



2018

THE 8<sup>TH</sup> INTERNATIONAL MACADAMIA SYMPOSIUM

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GREEN HOPE HEALTH SHARING

# An overview of the Australian macadamia industry

Speaker: Jolyon Burnett – CEO - Australian Macadamia Society



# Australian growing regions

Macadamias are grown along the eastern coast of Australia from Nambucca Heads in the south to Mackay in the north. There are small plantings in Western Australia. Total hectares planted are estimated to be around 28,000 with around 20,000 ha already yielding.

Region	Northern Rivers	Nambucca	South-east Queensland	Gympie	Bundaberg
Av ha/farm	16	9	12	12	60
Av tree age	24	19	23	23	14
Tonnes in shell	18,000	2,500	2,500	3,500	21,000
% of total	38%	5%	6%	7%	43%



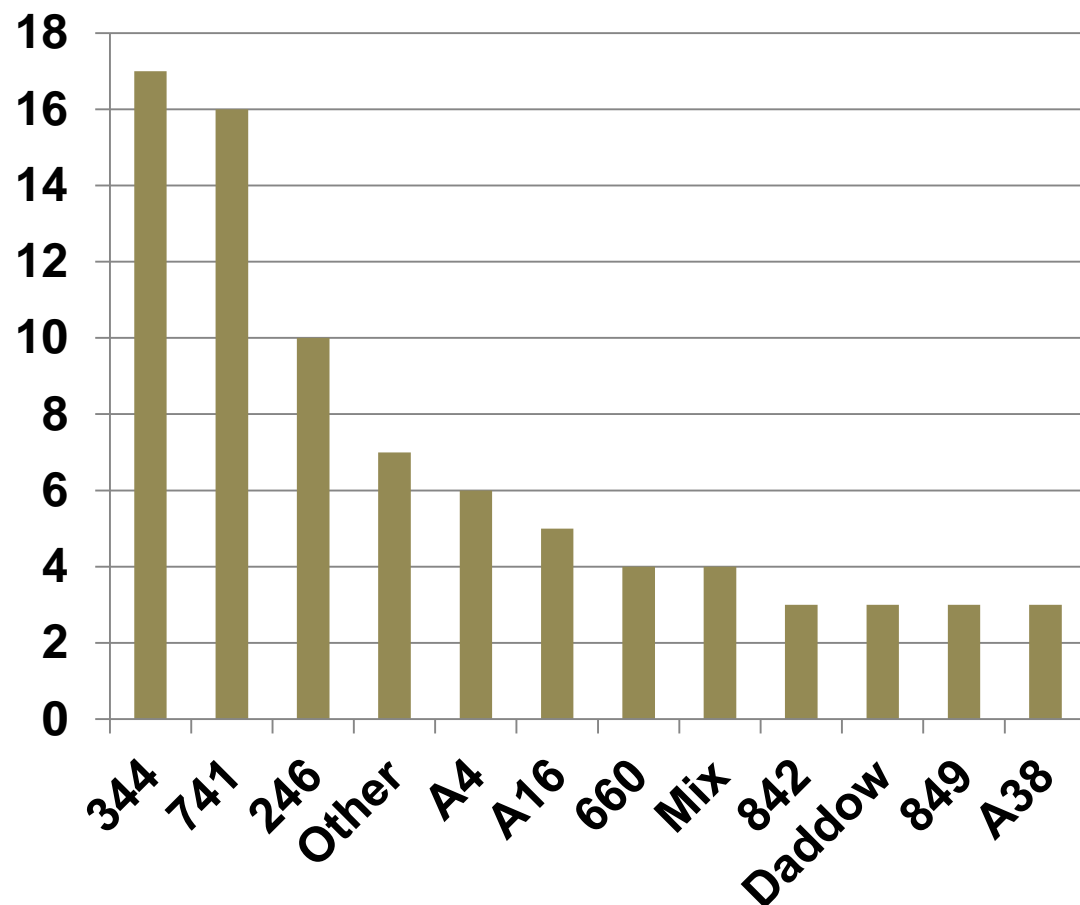
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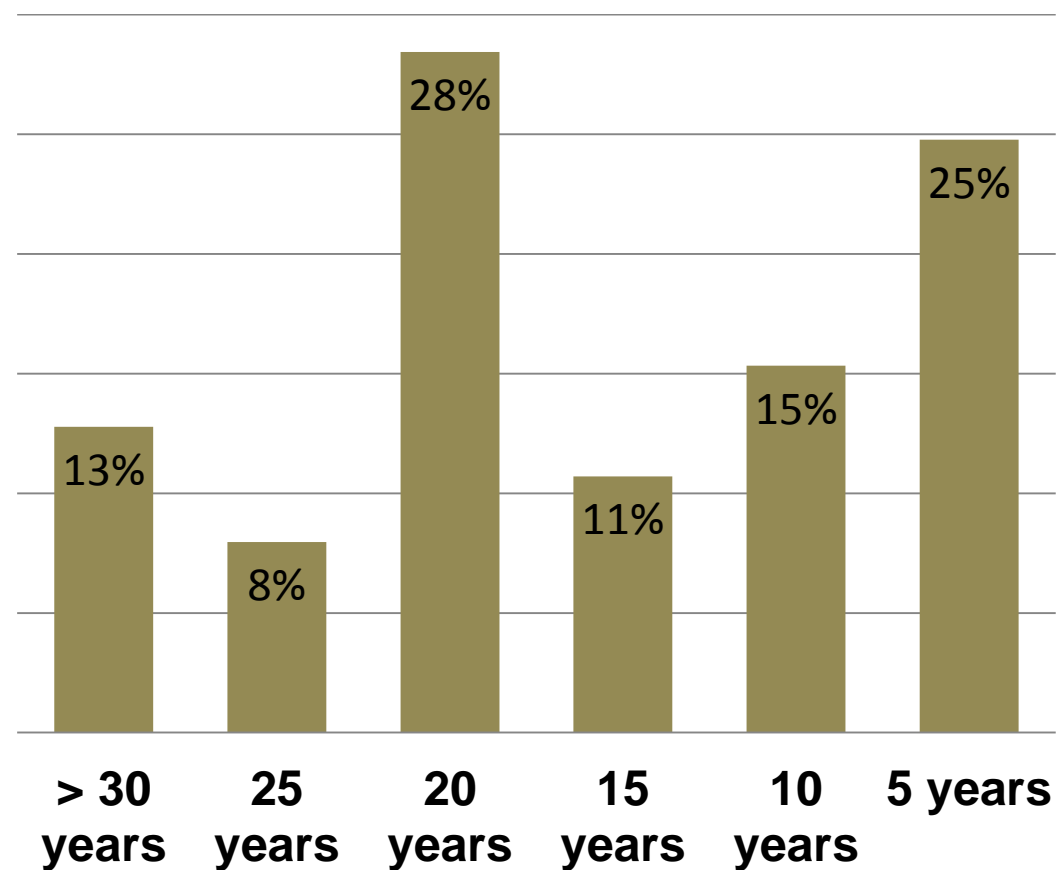
# Key Australian Industry Facts

<b>Production year</b>	<b>In shell production volume MT (at 10% moisture)</b>	<b>In shell average price \$/kg (at 10% moisture)*</b>	<b>SKR% (weighted avg)</b>	<b>USKR% (weighted avg)</b>
<b>2017</b>	<b>46,000</b>	<b>5.62</b>	<b>34.33</b>	<b>2.8</b>
<b>2016</b>	<b>52,000</b>	<b>5.51</b>	<b>33.32</b>	<b>3.14</b>
<b>2015</b>	<b>48,300</b>	<b>5.09</b>	<b>33.64</b>	<b>2.46</b>
<b>2014</b>	<b>43,600</b>	<b>3.83</b>	<b>33.66</b>	<b>3.16</b>
<b>2013</b>	<b>35,200</b>	<b>3</b>	<b>31.81</b>	<b>3.47</b>

## Historical plantings of varieties

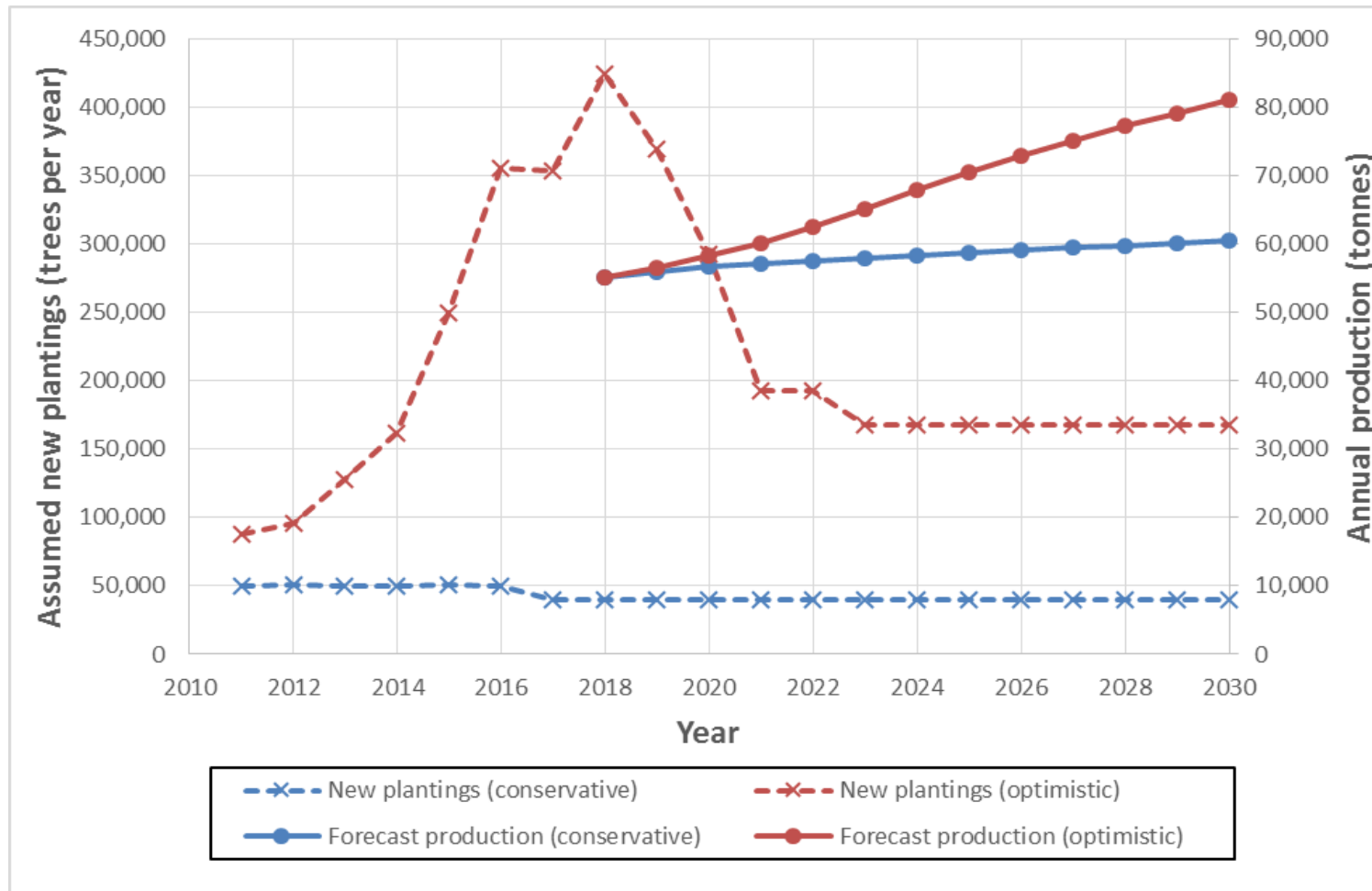


## Estimated % of plantings @ ages





# Growth in plantings & production





# Orchard floor management



**“Mohawks” of vegetation to support beneficial insects**



# Average Labour Use Per Bearing Hectare

Managed farms			Owner operated farms		
FTE*	Per ha	Per 50ha	FTE	Per ha	Per 50ha
Average	0.04	2.2	Average	0.07	3.4
Upper	0.13	6.4	Upper	0.18	9.0
Lower	0.00	0.1	Lower	0.00	0.0

\* Full time equivalent



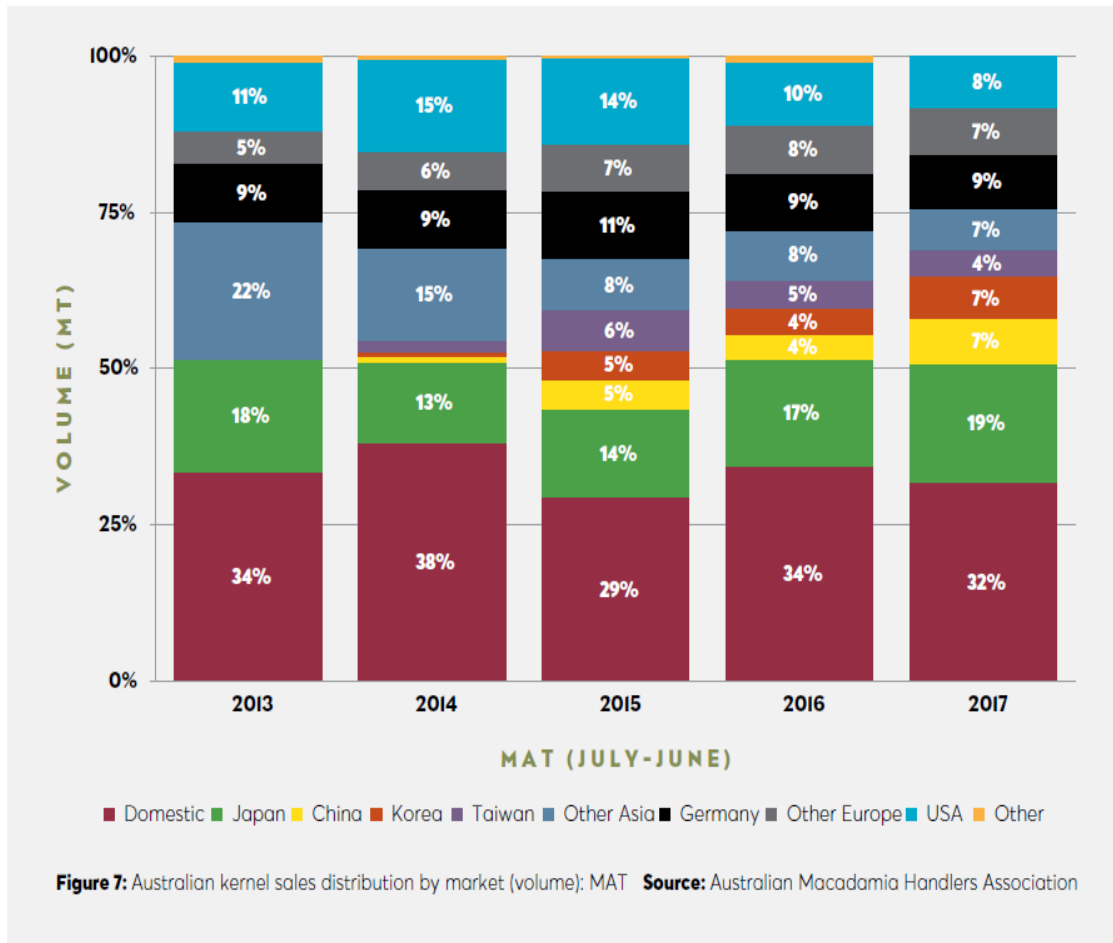
# Australian processing sector

There are 7 major processors, 2 smaller processors and 2 inshell handlers (<http://www.australian-macadamias.org/trade/suppliers>) in Australia that together process over 90% of the Australian crop. These processors currently have the capacity to process the entire Australian crop as kernel if required. All Australian processors are HACCP accredited as well as many other relevant global food safety certifications.

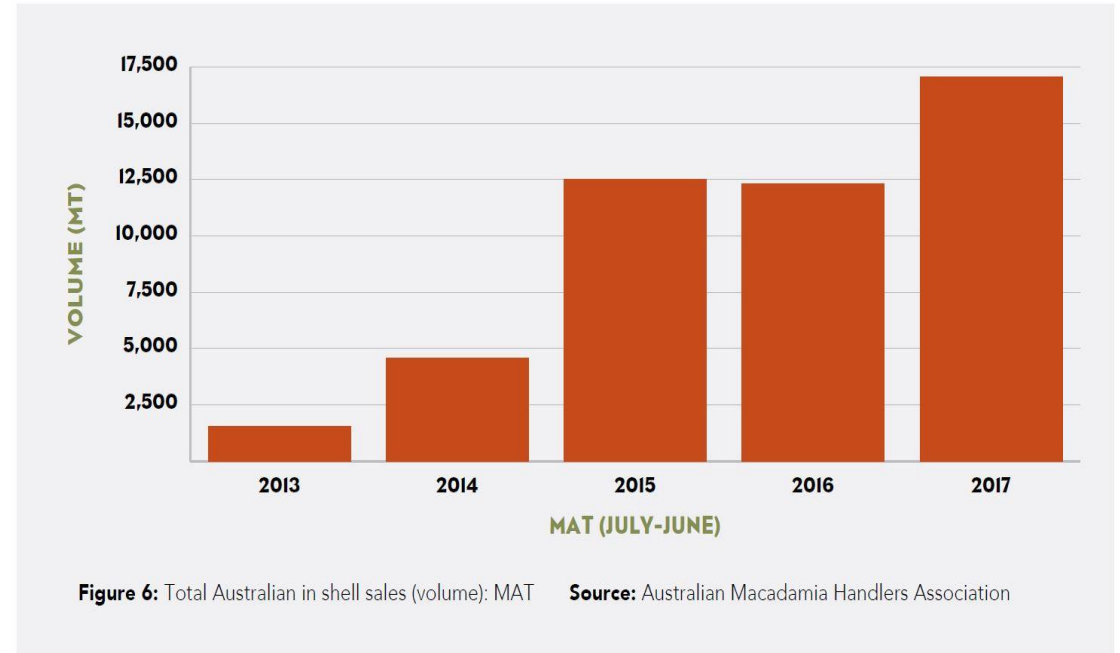


World class quality control

# Kernel sales by market



# In shell sales by year



**Approximately 30% of the total Australian crop has been sold as inshell in recent years**

# A strong united industry

The AMS is the only representative body for macadamias in Australia.

It was established over 40 years ago

The Society covers all sectors of the industry including growers, processors, input suppliers, researchers, service providers and value adders

It has 750 members of which around 650 are growers

Our members account for around 85% of production

The Society manages the industry communications and marketing programs and supports R&D with a comprehensive extension program.

The AMS worked with the Australian government to establish grower levies for marketing and research and development

Through this mechanism the Australian industry spends around A\$2.5 million annually on research and close to A\$3 million on marketing





# The Australian macadamia industry at a glance

# Thank you

## AUSTRALIA'S MACADAMIA INDUSTRY IN NUMBERS



### BUNDABERG

Fastest growing macadamia farming region



OVER  
**\$250M**

Farm-gate value of Australia's macadamia industry



ABOUT  
**22,000**

Number of hectares under planting



**700**

Number of Australian macadamia growers



ALMOST  
**\$650M**

Retail value of Australia's macadamia industry



**26,000**

Estimated hectares under planting by 2020



**30%**

Percentage of Australia's annual production sold as in-shell



OVER  
**48,000**

TONNES  
Volume of 2016 Aus macadamia crop (in-shell) / 3.5% moisture content



**\$2.5M**

Annual investment in Research & Development



**70%**

Proportion of Australian crop that is exported

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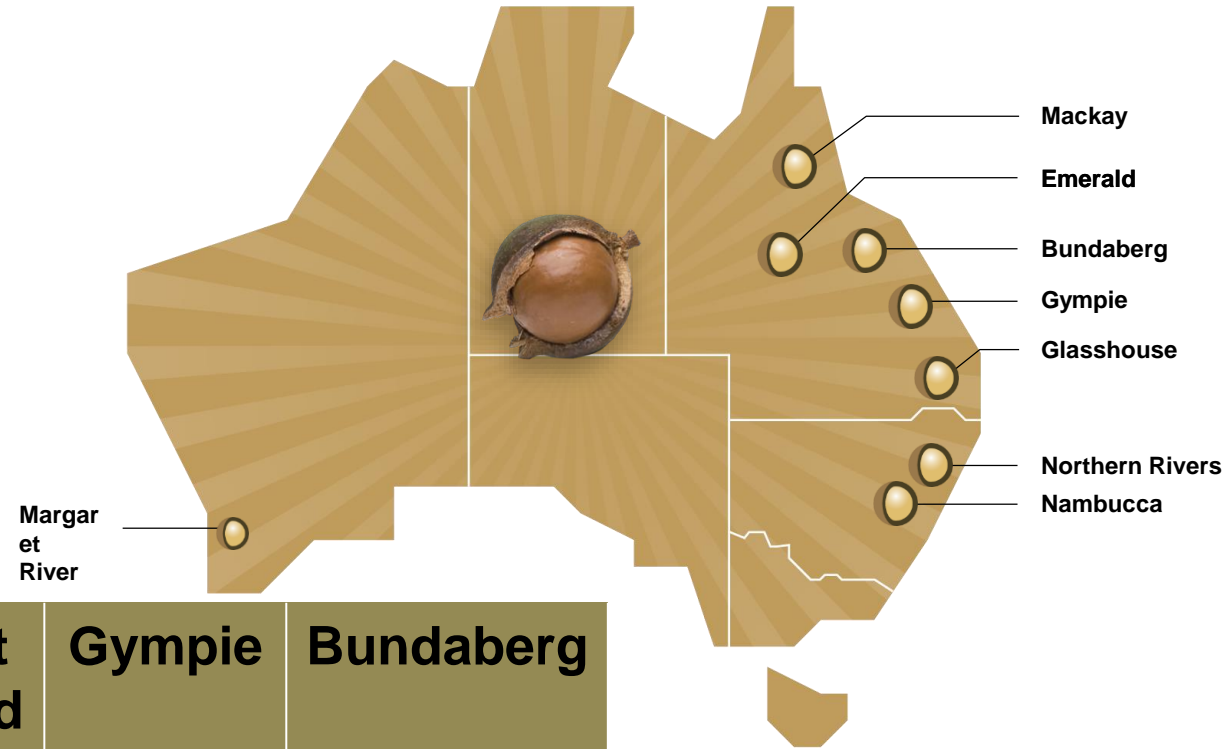
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