

Australian Macadamias



The teenage nut:
fresh
full of potential
but...
a little unpredictable



Still growing

Trees and planted area 2008/09



Age	Trees	Hectares
0 – 6 years	1.78 million	5,900
> 6 years	5.36 million	19,800
Total	7.17 million	25,700

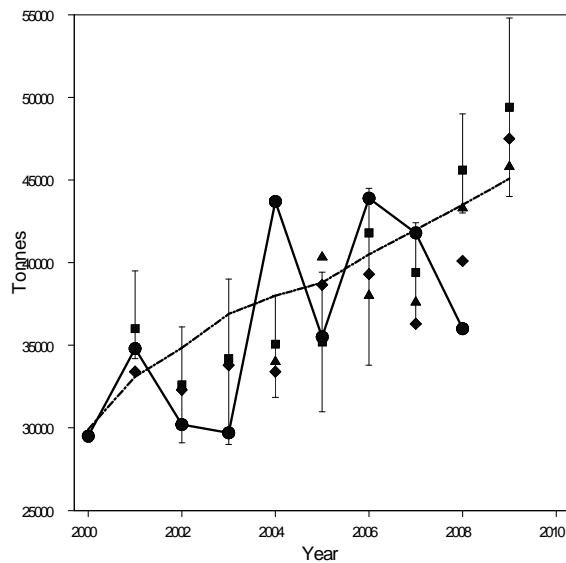


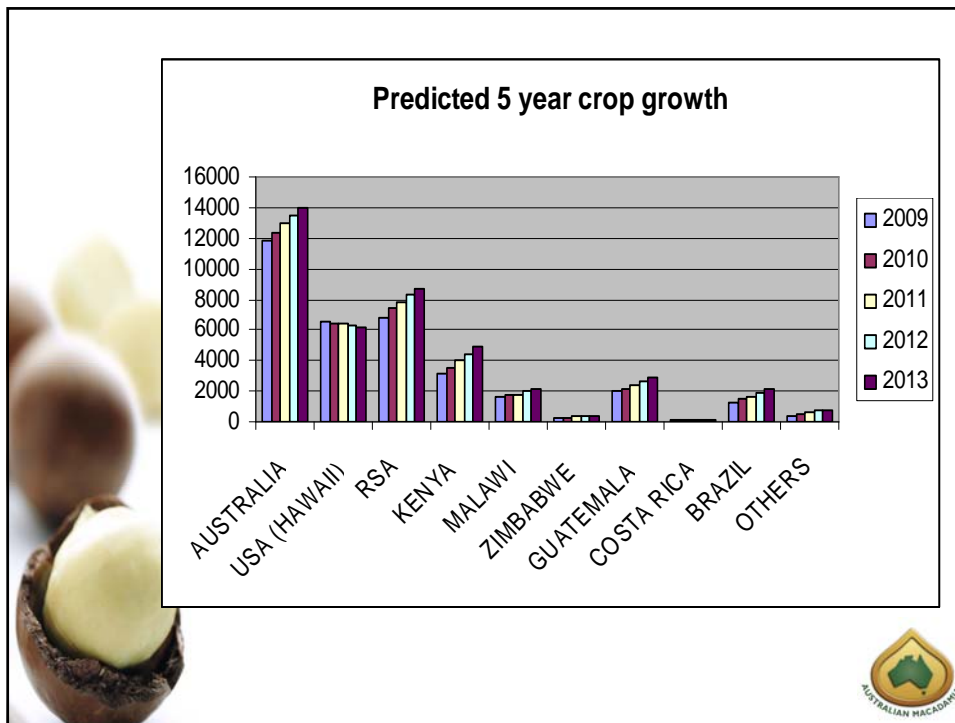
A developing maturity

- ~40,000 t NIS or 12,600 t kernel
- \$100 million at farm gate
- Global focus - 70% exported
- 900 growers – 85% AMS members
- ~ 12 processors
- Growing pains - variable yields
- Trying new things - \$2 million in R&D



Forecast vs actual crop



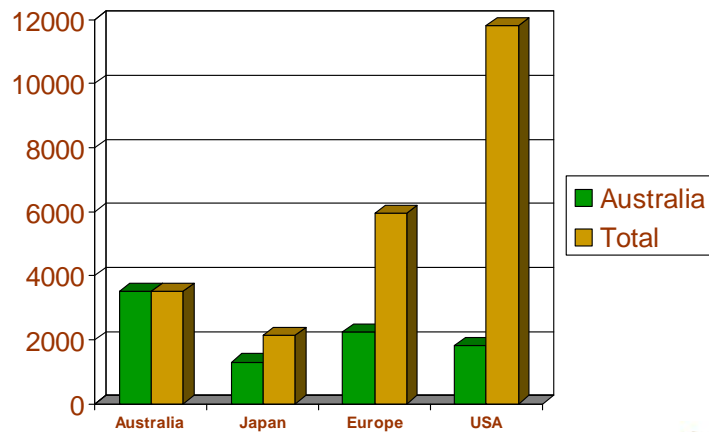


The world is our oyster

- Macadamias are ~ 2% of world tree nut trade
- Australia accounts for ~ 45%
- Market access issues are tariff not phytosanitary
- Strengthening domestic market
- Europe is snack & growing
- Japan is confectionary & building snack
- USA; identity crisis from bakery to ?
- \$2 million in marketing & promotion



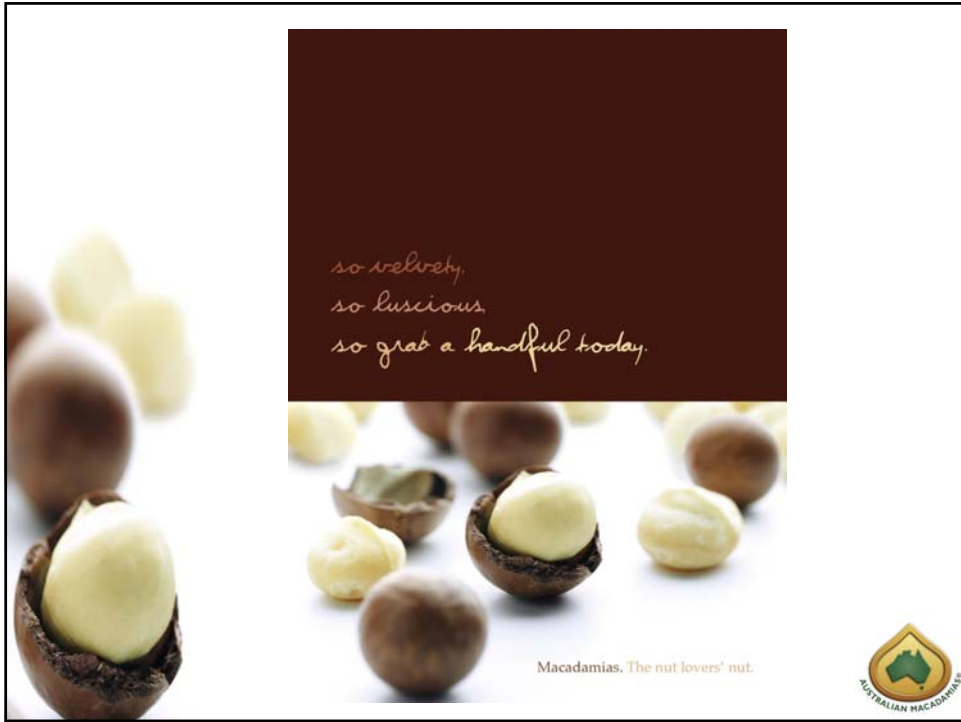
Market share for Australian kernel 2008

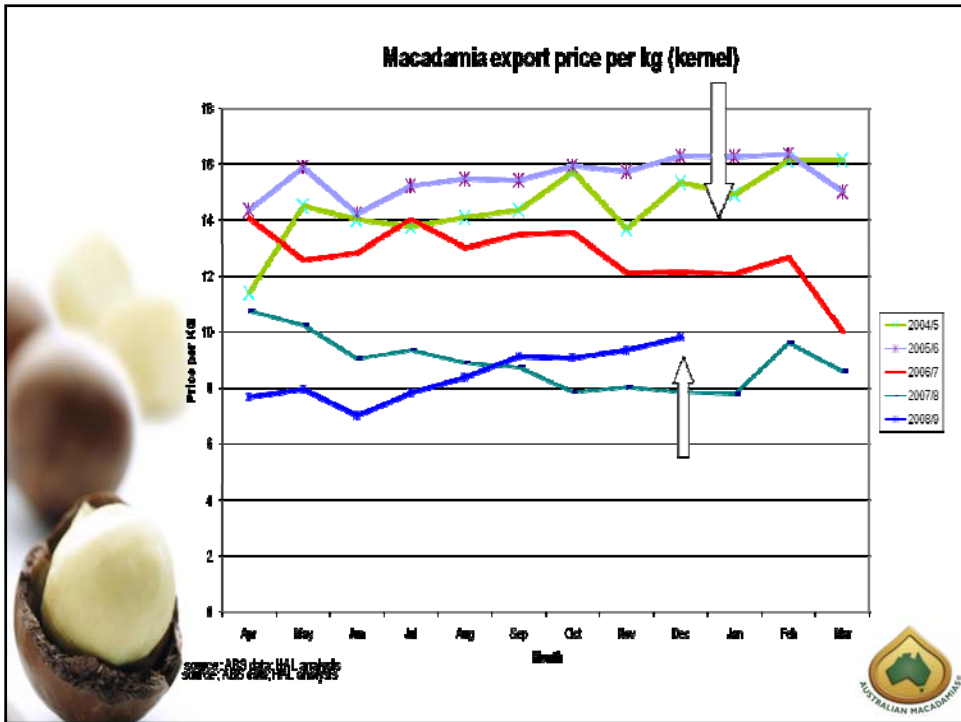
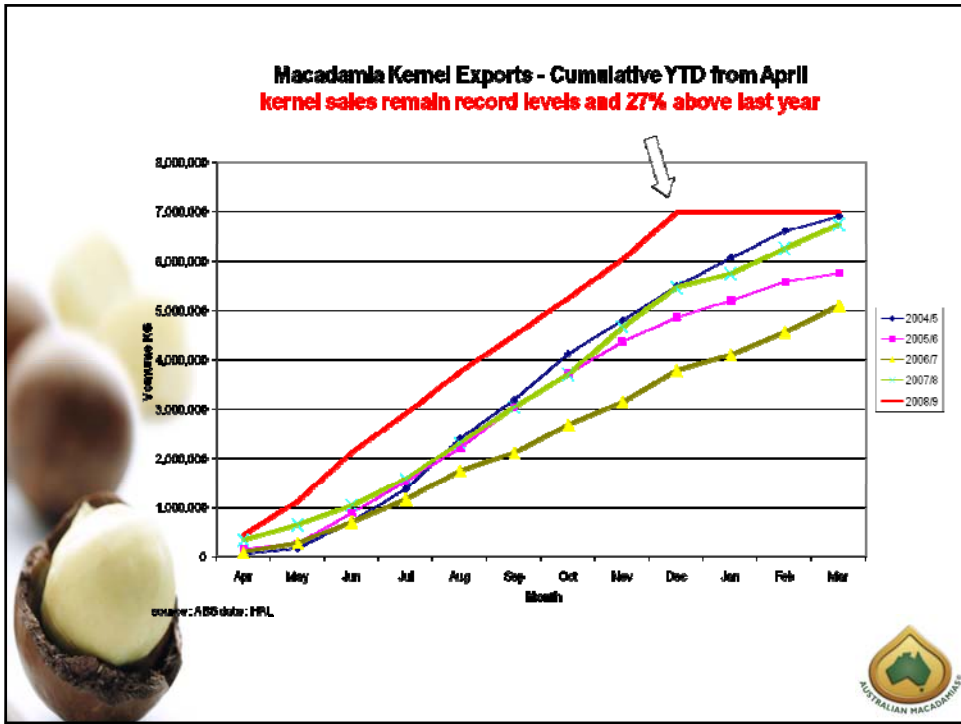


Future challenges

- Consistency of supply
- Environmental credentials
- Total orchard management
- Improved supply chain management
- Coordinated positioning
- Differentiating Australian kernel
- Structural adjustment
- Capturing the inherent potential

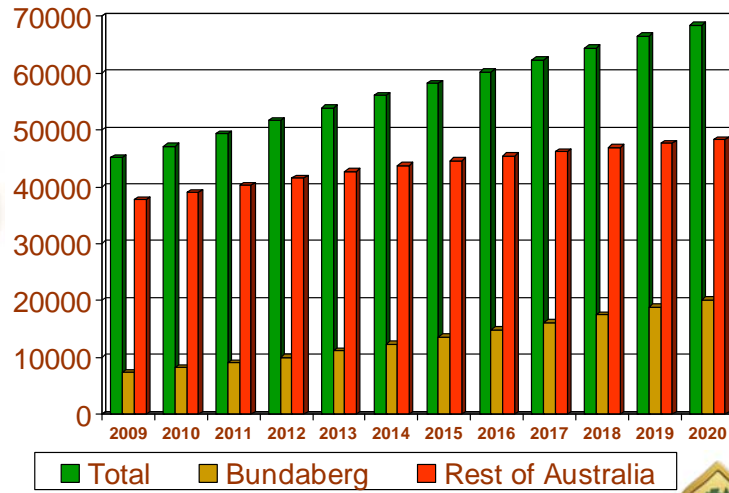






Forecast production

tonnes NIS @ 10% moisture



Cultivars planted by decade

