



Peekin into the Future

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Stahmann Farms Enterprises

2017 Australian Nut
Conference

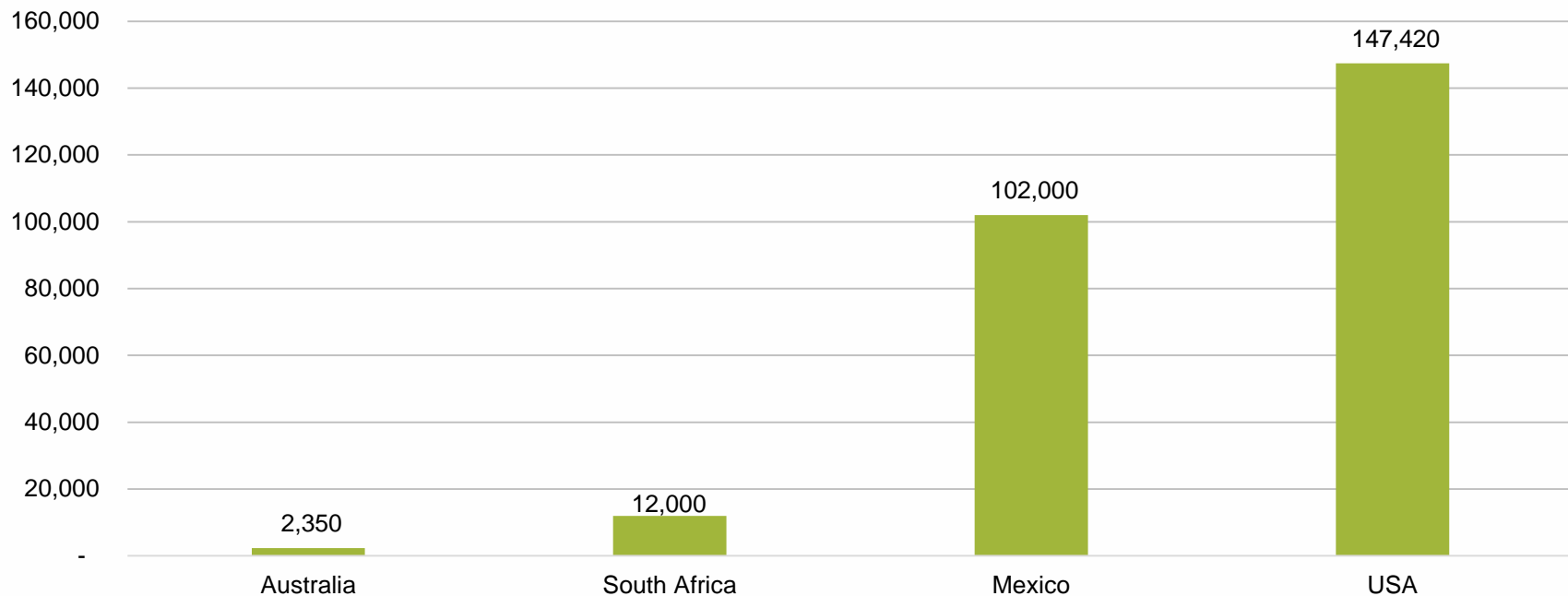
27 - 29 March 2017
Pullman, Melbourne, Albert Park



What would you like to know about pecans?

- The fundamentals:
Supply, price and consumption
- The marketplace:
Who eats pecans?
- The future of production...

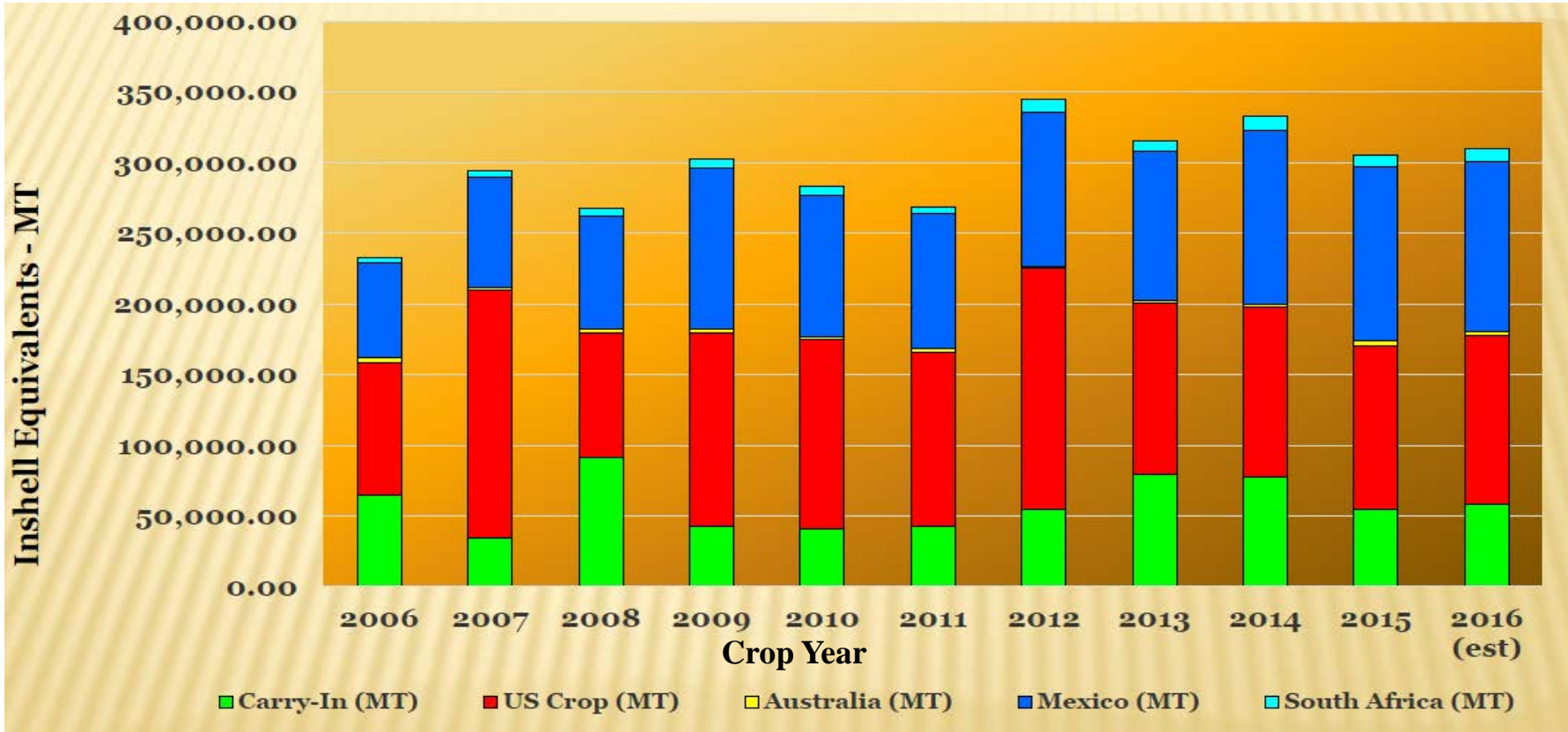
Global Pecan Production 2016



Source: *INC Statistics*

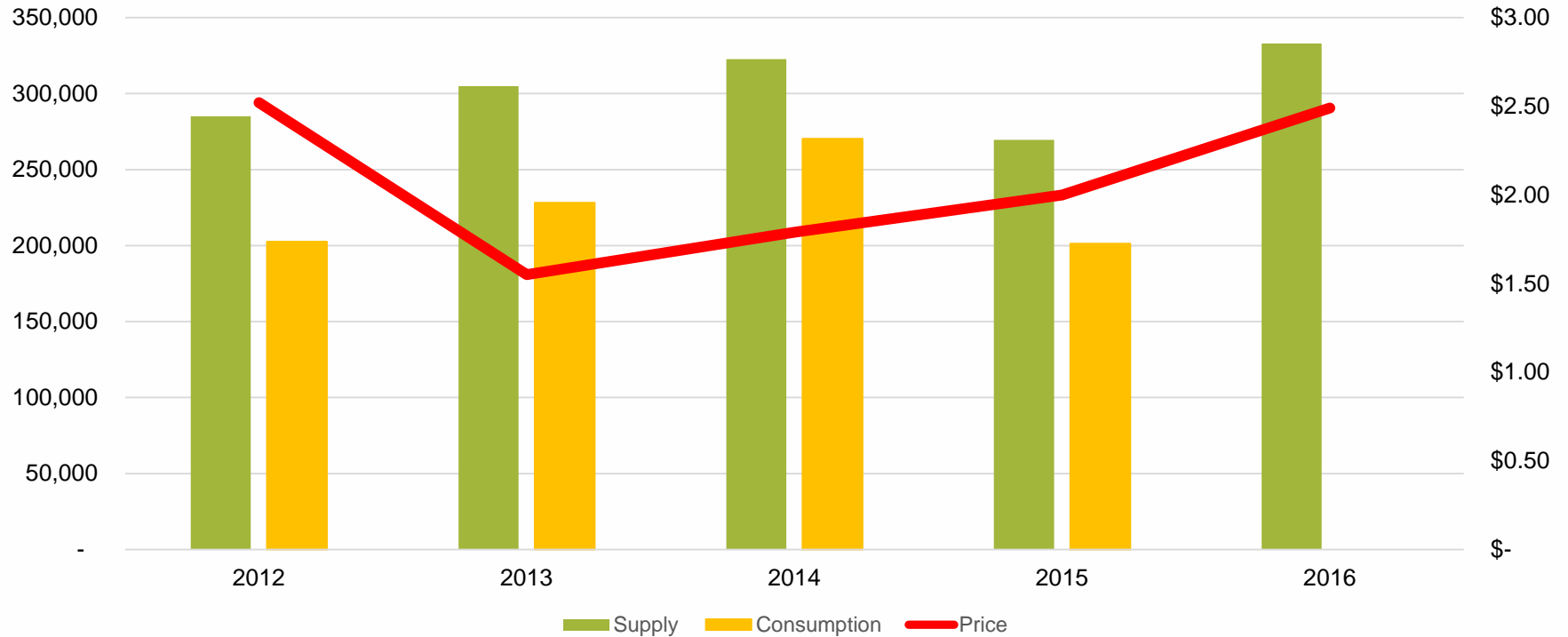
Metric Tonnes

World Pecan Supply



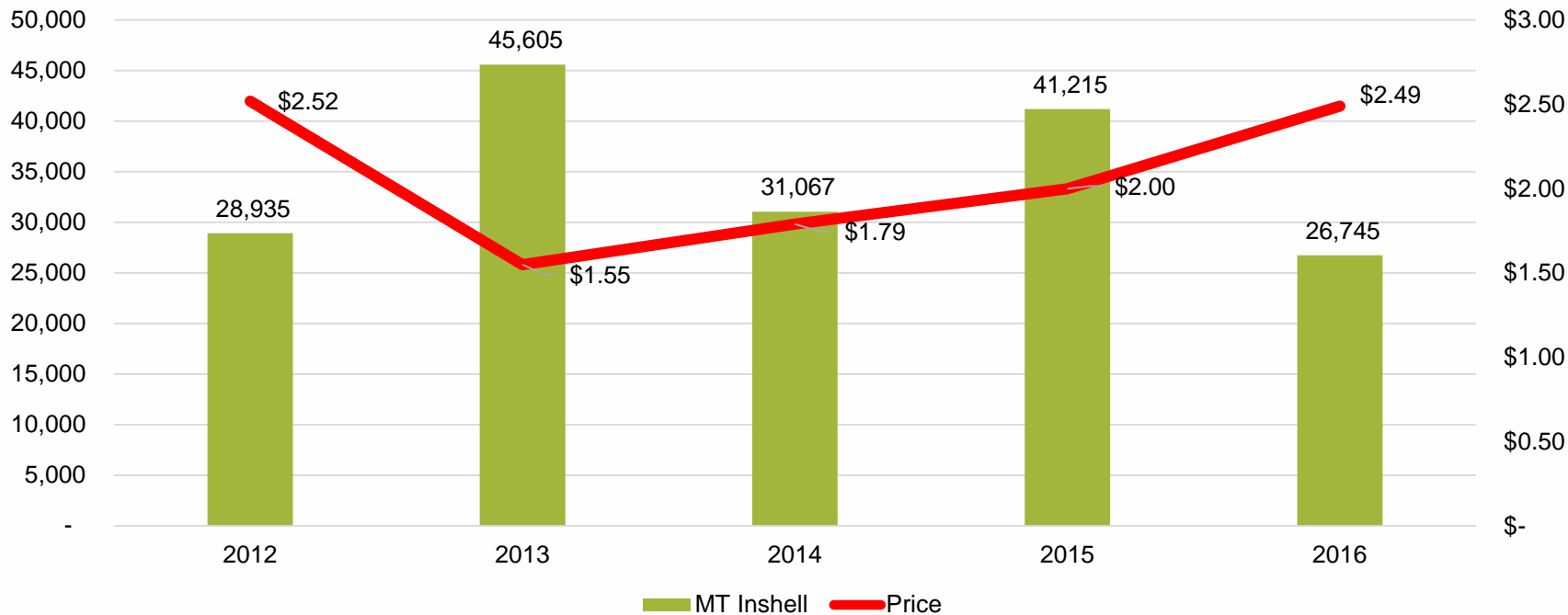
Recent US Market History

Supply + Consumption (Mt NIS) + Price (USD/lb ave.)



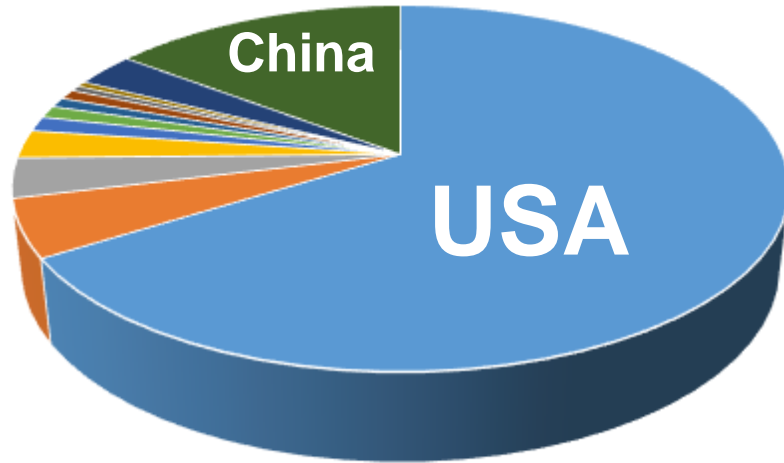
...the China effect

US Exports to China (Mt Inshell) V Price



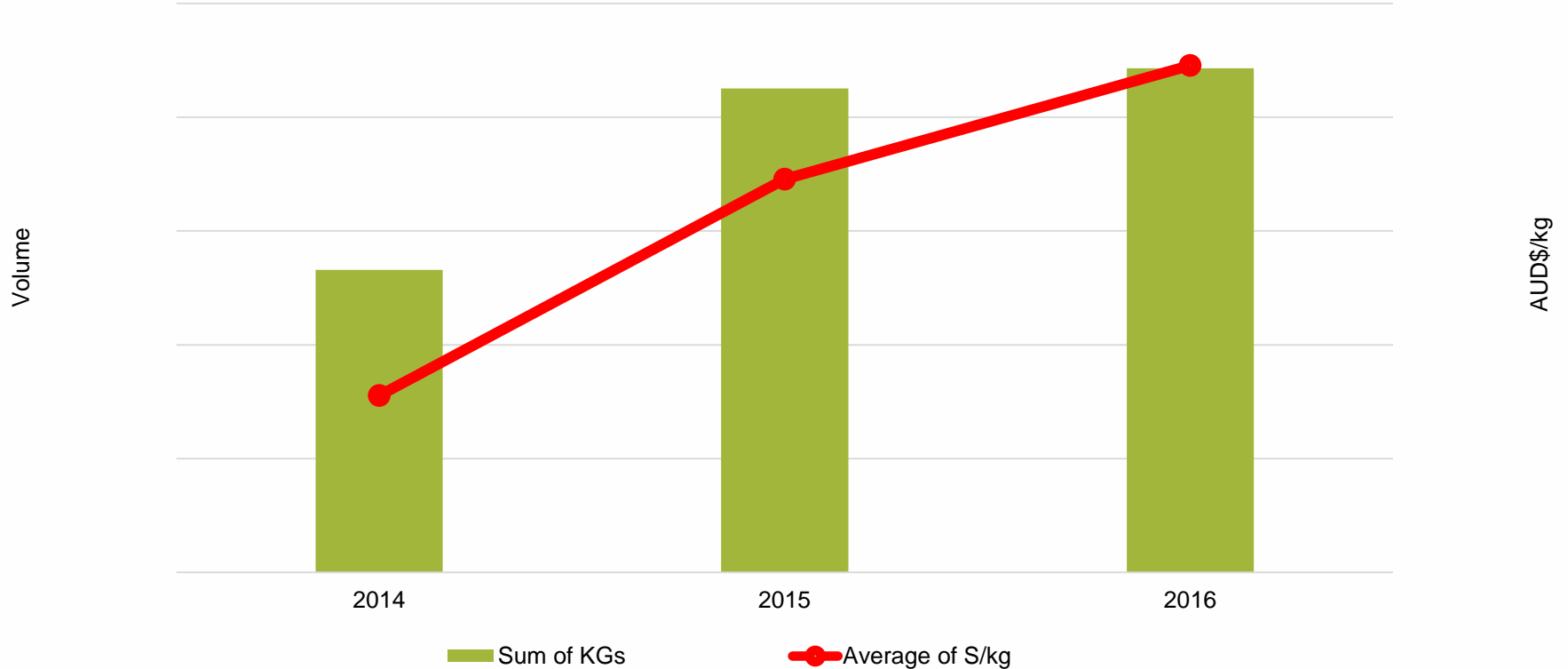
Who eats pecans?

Share of US crop



- | | | | |
|----------------|-------------|---------------|-------------------|
| ■ USA | ■ Canada | ■ Netherlands | ■ United Kingdom |
| ■ Israel | ■ Mexico | ■ France | ■ Germany |
| ■ Korea, South | ■ Hong Kong | ■ Others | ■ China (Inshell) |

Domestic (Pecan Halves) Sales



Australian Pecan Production

- 1,300 hectares currently planted
 - 90% in production at +/- 2,500Mt
- Orchard area expected to double by 2020 with new plantings by Stahmann (and others)
 - Australian crop to double by 2030
 - Approx. 6,000 tonnes NIS projected by then

Major Australian producer...

Early morning aerial fertilising at Australia's largest pecan orchard.

This orchard is grown without the use of pesticides, and is now trialling integrated weed management.



Future Australian production...

100 hectares planted in
2015/16 in the Gwydir
Valley

Trialling precocious Navajo
varietal along with
successful Wichita

Integrated weed
management program in
new plantings



Future Australian production...



Improved Budding
outcomes

.... High heat load
push a huge growth
burst in Feb' 2017



China Pecan Production

- 33,000 hectares planted;
- 2,000 - 3,500 hectares in production now;
- 10,000 new hectares planted each year;
- 2016 production - 1,500 to 2,500 MT

750kg / hectare is about 1/4 of established growing regions.

Global Pecan Production Projections

Producer	2016	2030	(Increase)	%
USA	140,000	200,000	60,000	43%
Mexico	150,000	220,000	70,000	47%
South Africa	14,000	40,000	26,000	186%
China	2,000	50,000	48,000	2400%
Australia	2,500	6,000	3,500	140%
Others	3,000	10,000	7,000	233%
TOTAL	311,500	526,000	214,500	69%

No nut does “indulgent” quite like a pecan



.....Sorry Lynne, but we're the *pecan* Queen of indulgent!

Questions



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