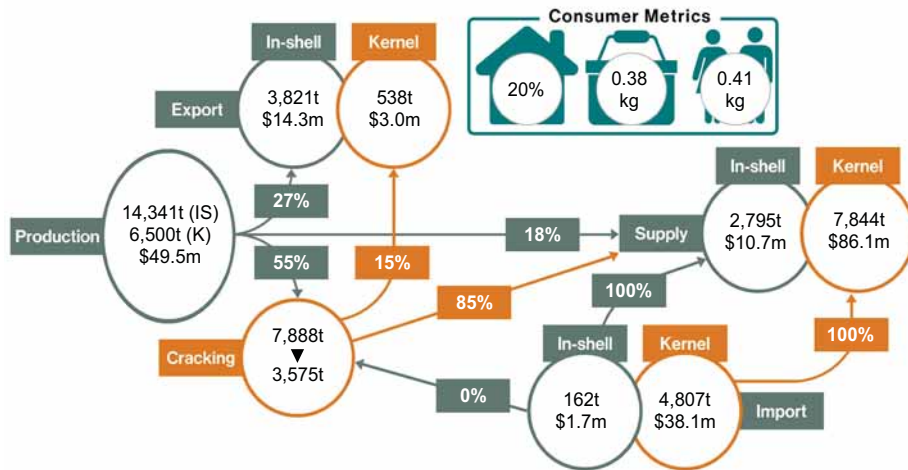


# Walnuts



# Walnuts Overview

## WALNUTS SUPPLY CHAIN – YEAR ENDING JUNE 2022



Sources: AC; CFVIWA; GTA; Australian Walnut Industry Association (AWIA); MP & DD (Freshlogic Analysis)

### TOTAL PRODUCTION:



# \$49.5M

14,341t (in-shell) and 6,500t (kernel) produced and valued at \$49.5M with 55% of production in shell sent to the cracking process.

### CONSUMER METRICS:



20% of Australian households purchased walnuts, buying an average of **380g** per shopping trip.

### PER CAPITA CONSUMPTION:



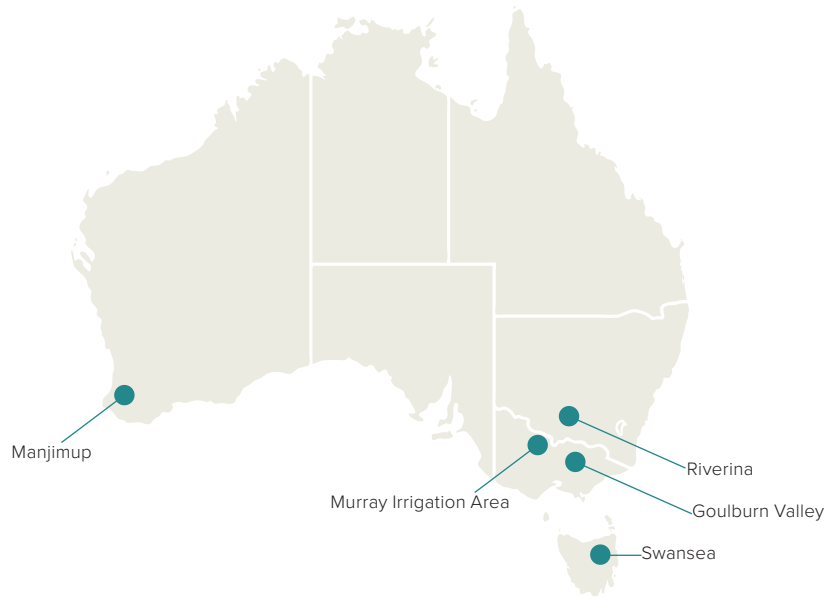
0.41kg in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (KWE t)	12,800	13,658	+7%	14,341	+5%
Production (\$m)	\$55.0	\$41.6	-24%	\$49.5	+19%
Production area (Ha)	4,022	4,022	-	4,022	-
Export Volume (KWE t)	3,036	5,699	+88%	4,359	-24%
Export Value (\$m)	\$14.6	\$19.1	+31%	\$17.2	-10%
Import Volume (KWE t)	4,609	4,787	+4%	4,969	+4%
Import Value (\$m)	\$44.2	\$38.3	-13%	\$39.8	+4%
Supply (KWE t)	10,058	8,572	-15%	10,639	+24%
Supply Wholesale Value (\$m)	\$104.4	\$70.7	-32%	\$96.9	+37%
Supply per Capita (kg)	0.39	0.33	-15%	0.41	+23%

Sources: AC; CFVIWA; GTA; Australian Walnut Industry Association (AWIA); MP & DD (Freshlogic Analysis)

# Walnuts Production

## MAJOR PRODUCTION AREAS



Source: *Wala*

Walnuts are grown across Australia, with the majority of production occurring in New South Wales. Walnuts have a strong export focus, with moderate volume of the Australian production being sold locally in-shell.

### PRODUCTION AREA:



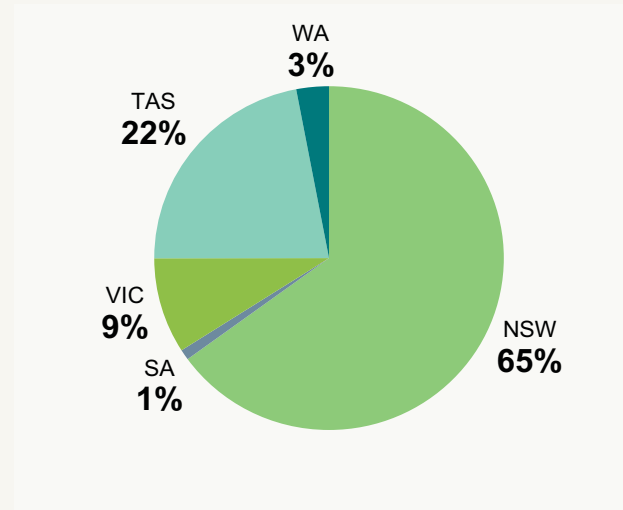
**4,022**  
Ha

### PRODUCTION WINDOW:



**Mar-Aug**

## 2021/22 WALNUTS PRODUCTION BY STATE



Source: *Wala*

## 2021/22 WALNUTS HARVEST SEASON BY STATE (IN-SHELL)

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	9,322	\$32.2	High	Medium	None	None	None	None	None	None	None	High	High	High
Tasmania	3,155	\$10.9	Medium	Medium	None	None	None	None	None	None	None	High	High	High
Victoria	1,291	\$4.5	Medium	None	None	None	None	None	None	None	None	None	High	High
Western Australia	430	\$1.5	Medium	None	None	None	None	None	None	None	None	High	High	Medium
South Australia	143	\$0.5	None	None	None	None	None	None	None	None	High	High	Medium	None

Availability legend: High (Dark Teal), Medium (Light Green), Low (Yellow-Green), None (Light Blue)

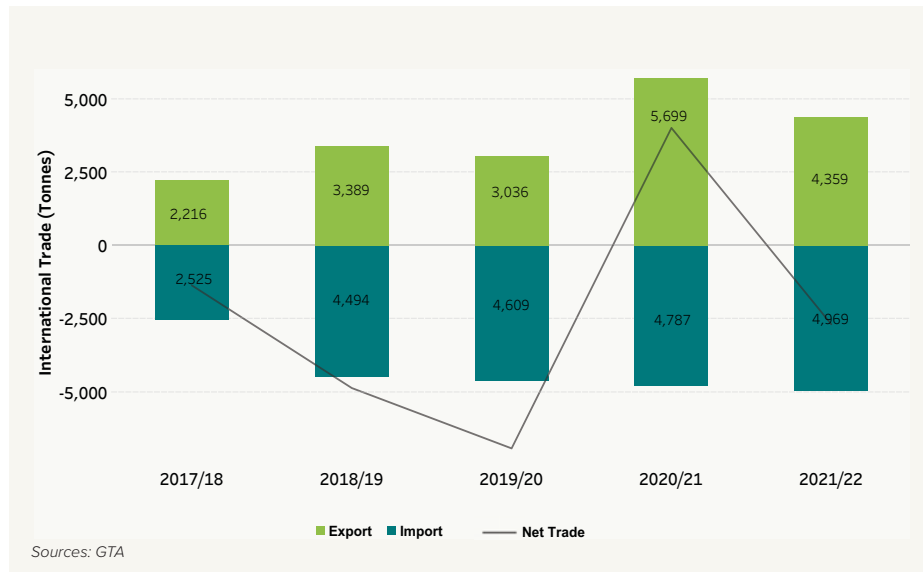
Source: *(Freshlogic Analysis)*



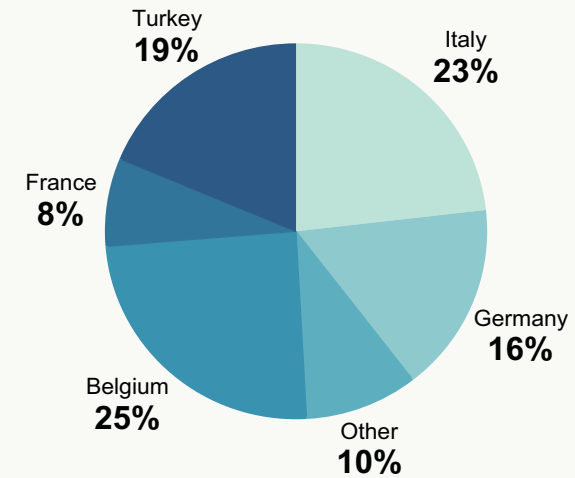
## Walnuts International Trade

### WALNUTS INTERNATIONAL TRADE

Australia has traditionally been a net importer of walnuts. For the year ending June 2022, Australia exported **3,821 tonnes** of in-shell walnuts (**88%** of walnuts exports) and **538 tonnes** of kernel walnuts (**12%** of exports), while importing **162 tonnes** of in-shell walnuts (**3%** of walnut import) and **4,807 tonnes** of kernel walnuts (**97%** of imports). The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes. A large proportion of imports are classified as to which country they are sourced from.



### 2021/22 WALNUTS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **25%** of exported walnuts were sent to **Belgium**, as profiled in the chart above.

### WALNUTS IMPORTS AND EXPORTS BY STATE (IN-SHELL AND KERNEL)

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
Victoria	2,666	2,566	3,067	New South Wales	2,988	5,671	4,282
New South Wales	1,345	1,569	1,225	Victoria	42	10	73
Queensland	346	306	427	Queensland	1	-	1
South Australia	160	230	181	Other	4	18	3
Western Australia	92	116	69	TOTAL	3,036	5,699	4,359
TOTAL	4,609	4,787	4,969				

### WALNUTS IMPORTS AND EXPORTS BY COUNTRY (IN-SHELL AND KERNEL)

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022	Year Ending June	2020	2021	2022
United States	3,506	3,636	3,796	Belgium	519	1,155	1,072
Vietnam	694	685	718	Italy	671	1,632	1,011
Chile	156	234	234	Turkey	229	1,844	815
China	160	193	205	Germany	485	631	712
Bulgaria	37	15	15	France	220	198	331
Other	55	24	1	Other	912	240	419
TOTAL	4,609	4,787	4,969	TOTAL	3,036	5,699	4,359

Source: GTA