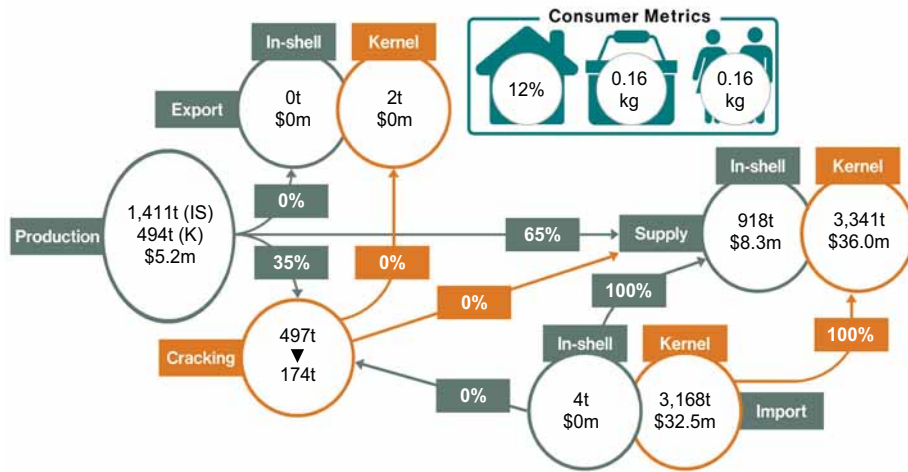





Hazelnuts

Hazelnuts Overview

HAZELNUTS SUPPLY CHAIN – YEAR ENDING JUNE 2022



CONSUMER METRICS:



12%

12% of Australian households purchased hazelnuts, buying an average of **160g** per shopping trip.

PER CAPITA CONSUMPTION:

0.16kg 

in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (KWE t)	350	380	+9%	494	+30%
Production (\$m)	\$3.7	\$4.4	+19%	\$5.2	+18%
Production area (Ha)	2,200	2,200	-	2,200	-
Export Volume (KWE t)	5	6	+20%	2	-69%
Export Value (\$m)	< \$0.1	< \$0.1	+24%	< \$0.1	-34%
Import Volume (KWE t)	3,496	3,172	-9%	3,170	>-1%
Import Value (\$m)	\$37.6	\$37.3	>-1%	\$32.5	-13%
Supply (KWE t)	3,841	3,546	-8%	3,662	+3%
Supply Wholesale Value (\$m)	\$46.6	\$47.1	+1%	\$44.2	-6%
Supply per Capita (kg)	0.17	0.16	-6%	0.16	+6%

Sources: Hazelnuts Growers of Australia (HGA); AC; CFVIWA; GTA; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION:



\$5.2M

1,411t (in-shell) and 494t (kernel) produced and valued at **\$5.2M** with 35% of production in shell sent to the cracking process.

Hazelnut Production

MAJOR PRODUCTION AREAS



Source: HGA

Hazelnuts are grown in the temperate areas of South-Eastern Australia, with production occurring in Victoria and New South Wales. The majority of hazelnuts are cracked and sold in kernel form.

PRODUCTION AREA:



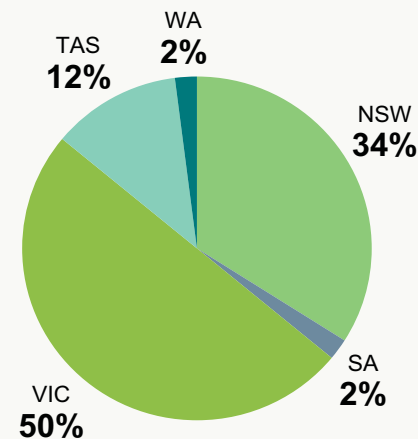
2,200
Ha

PRODUCTION WINDOW:



Feb-Mar

2021/22 HAZELNUT PRODUCTION BY STATE



Source: HGA

2021/22 HAZELNUT HARVEST SEASON BY STATE (KERNEL)

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	706	\$2.6								High	Medium			
New South Wales	480	\$1.8								High	Medium			
Tasmania	169	\$0.6								High	Medium			
South Australia	28	\$0.1								High	Medium			
Western Australia	28	\$0.1								High	Medium			

Availability legend: High Medium Low None

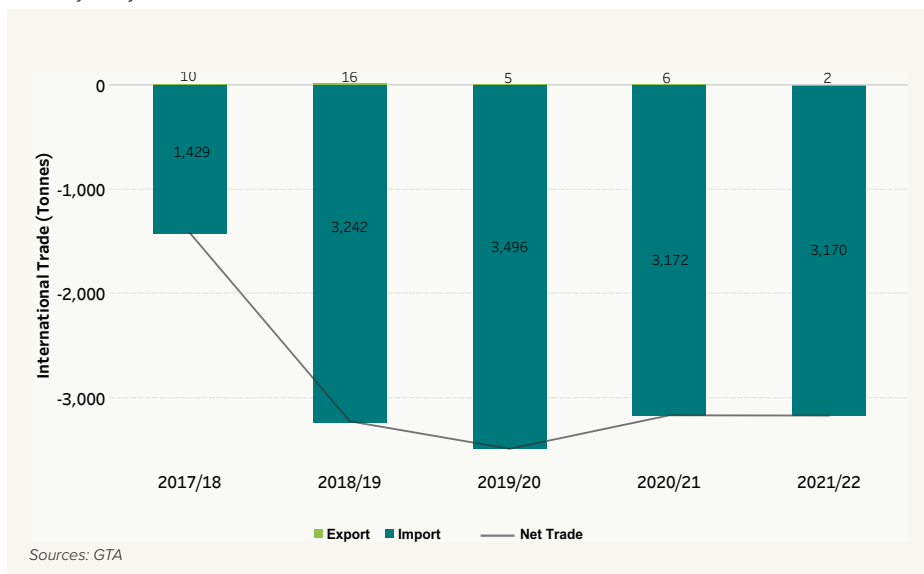
Source: HGA



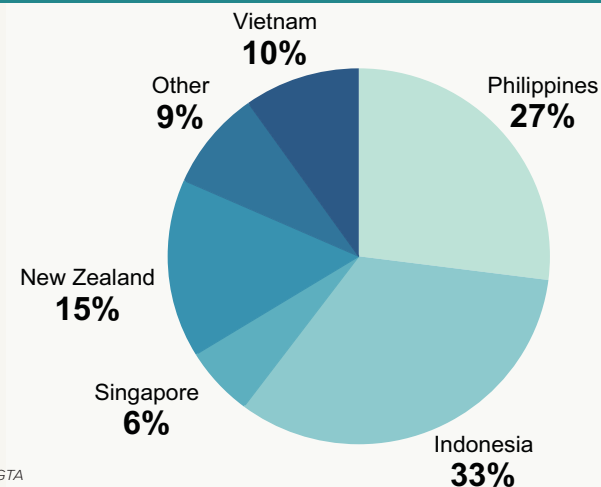
Hazelnut International Trade

HAZELNUT INTERNATIONAL TRADE

Australia is a net importer of hazelnuts, with the majority of imports being in kernel form. For the year June 2022, Australia exported **1 tonne** of kernel hazelnuts and **1 tonne** of in-shell hazelnuts, while importing **3,170 tonnes** of kernel hazelnuts. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes. The majority of imports are classified as to which country they are sourced from.



2021/22 HAZELNUT EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2022, **33%** of exported hazelnuts were sent to **Indonesia**, as profiled in the chart above.

HAZELNUT 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
New South Wales	2,190	2,229	2,230	New South Wales	1	1	-
Victoria	1,092	714	728	Victoria	1	4	-
Queensland	210	187	213	Others	3	1	2
Western Australia	3	4	3	TOTAL	6	6	2
Tasmania	-	40	-				
TOTAL	3,496	3,174	3,173				

HAZELNUT 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
Turkey	3,427	3,011	3,136	Philippines	-	-	1
United States	54	15	32	Indonesia	1	1	1
United Kingdom	-	-	3	Vietnam	-	1	-
China	-	-	1	New Zealand	3	3	-
Italy	-	120	-	Singapore	1	-	-
Other	14	28	-	Other	1	1	-
TOTAL	3,496	3,174	3,173	TOTAL	6	6	2

Source: GTA