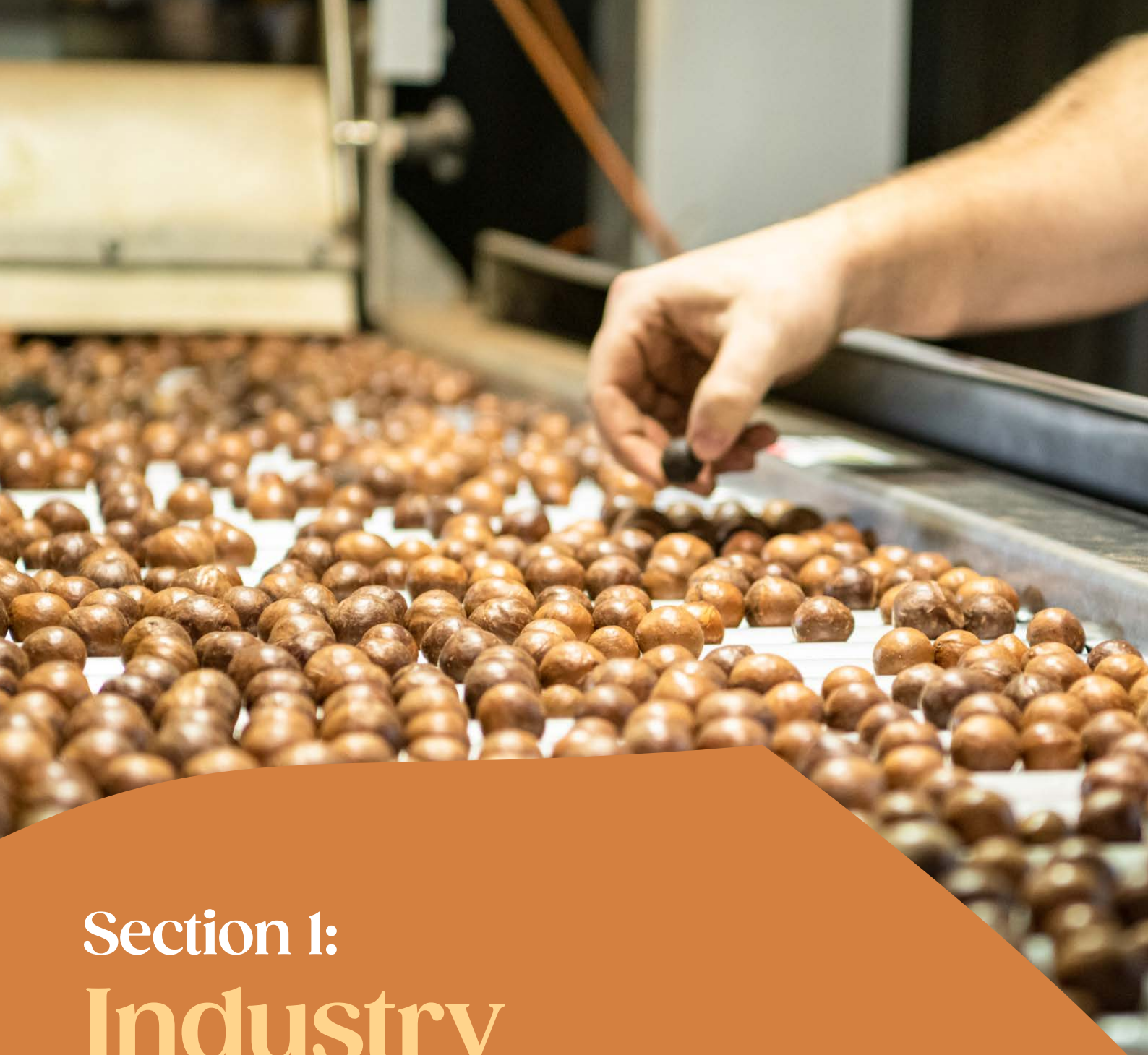


Australian Macadamias Yearbook 2025





Section 1: Industry Overview

Australia's macadamia industry in numbers

Current and forecast crop

43,800t

2025 crop
(in-shell at 3.5% moisture)

85,440t

2030 forecast crop¹
(in-shell at 3.5% moisture)

Area under production¹

46,487ha

Area planted
(as at Nov 2025)

37,987ha

Area bearing
(for the 2025 crop)

Industry footprint

800

Number of growers

\$275m

Export value
(last financial year)

668,571t

Carbon sequestered (CO₂e)
(in the 2025 season)

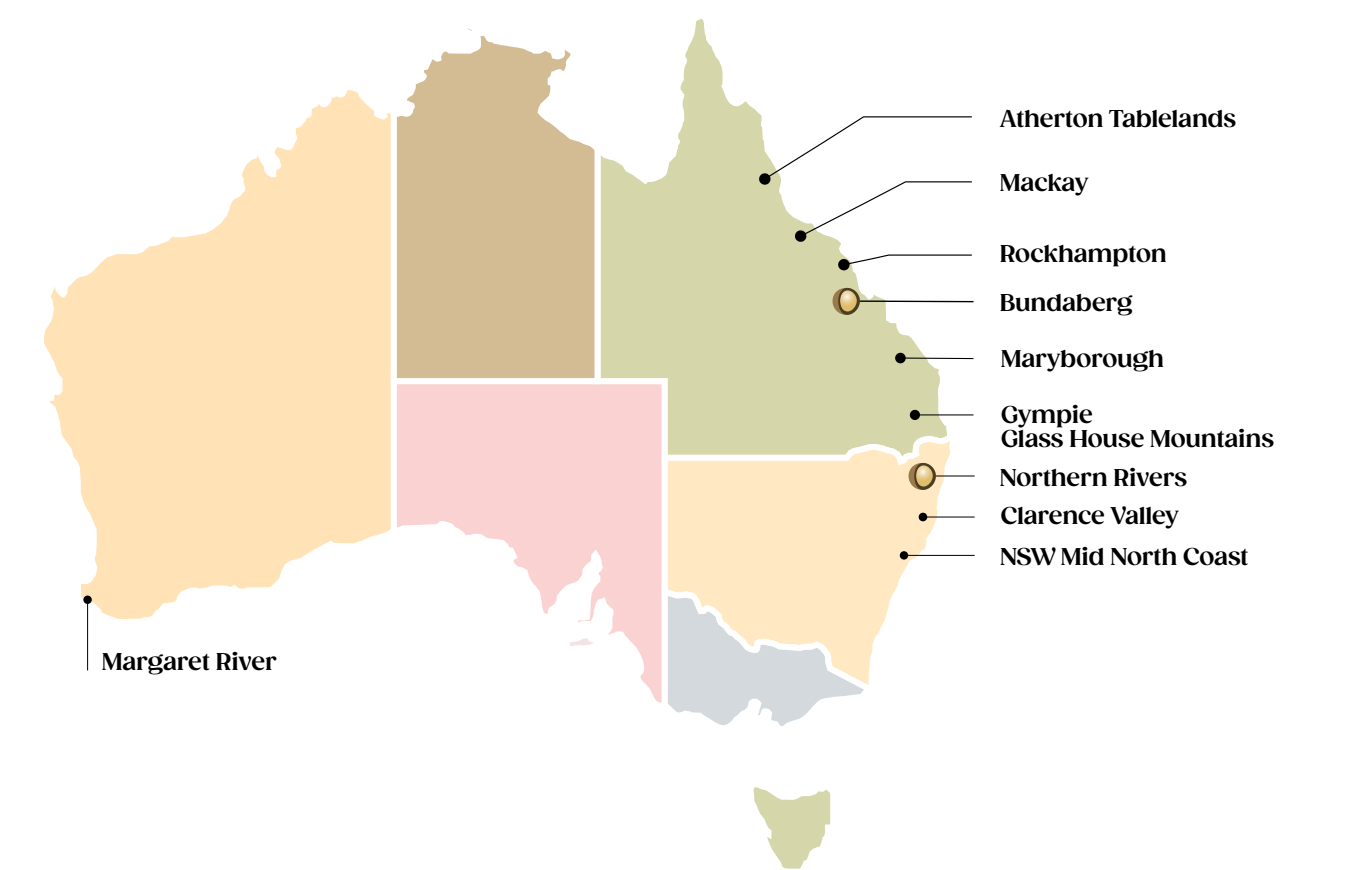
72%

Production exported

¹ Source: AARSC Tree Mapping and AMS Forecasting projects; 2030 forecast Crop from AMHA (referenced to AARSC Tree Mapping and AMS Forecasting projects)

Major Australian growing regions

Macadamias are grown along the eastern coast of Australia from the NSW Mid North Coast in the south to the Atherton Tablelands in the north. Collectively Bundaberg and the Northern Rivers region produce around 80% of the Australian crop.



Production by growing region:

NSW Mid North Coast	Clarence Valley	NSW Northern Rivers	SE QLD	Gympie	Maryborough	Bundaberg	QLD Tropical	WA	Total
1,122.4	248.4	7,741.3	2,630.7	1,836.2	1,227.3	27,924.7	1,037.8	9.3	43,778.1
2.6%	0.6%	17.7%	6.0%	4.2%	2.8%	63.8%	2.3%	0.02%	100%
NSW			QLD					WA	
9,112.1			34,656.7					9.3	
20.8%			79.2%					0%	

Table 1: Australian macadamia production by growing region for 2025 season. Tonnes in shell, 3.5% moisture content, with minor adjustments for final actual crop tonnage.
Source: Australian Macadamia Handlers Association

Australia is home to approximately 800 macadamia growers and as at November 2025 has 46,487 hectares planted. Australia produced a crop of 43,800 tonnes in shell at 3.5% moisture content for the 2025 season.

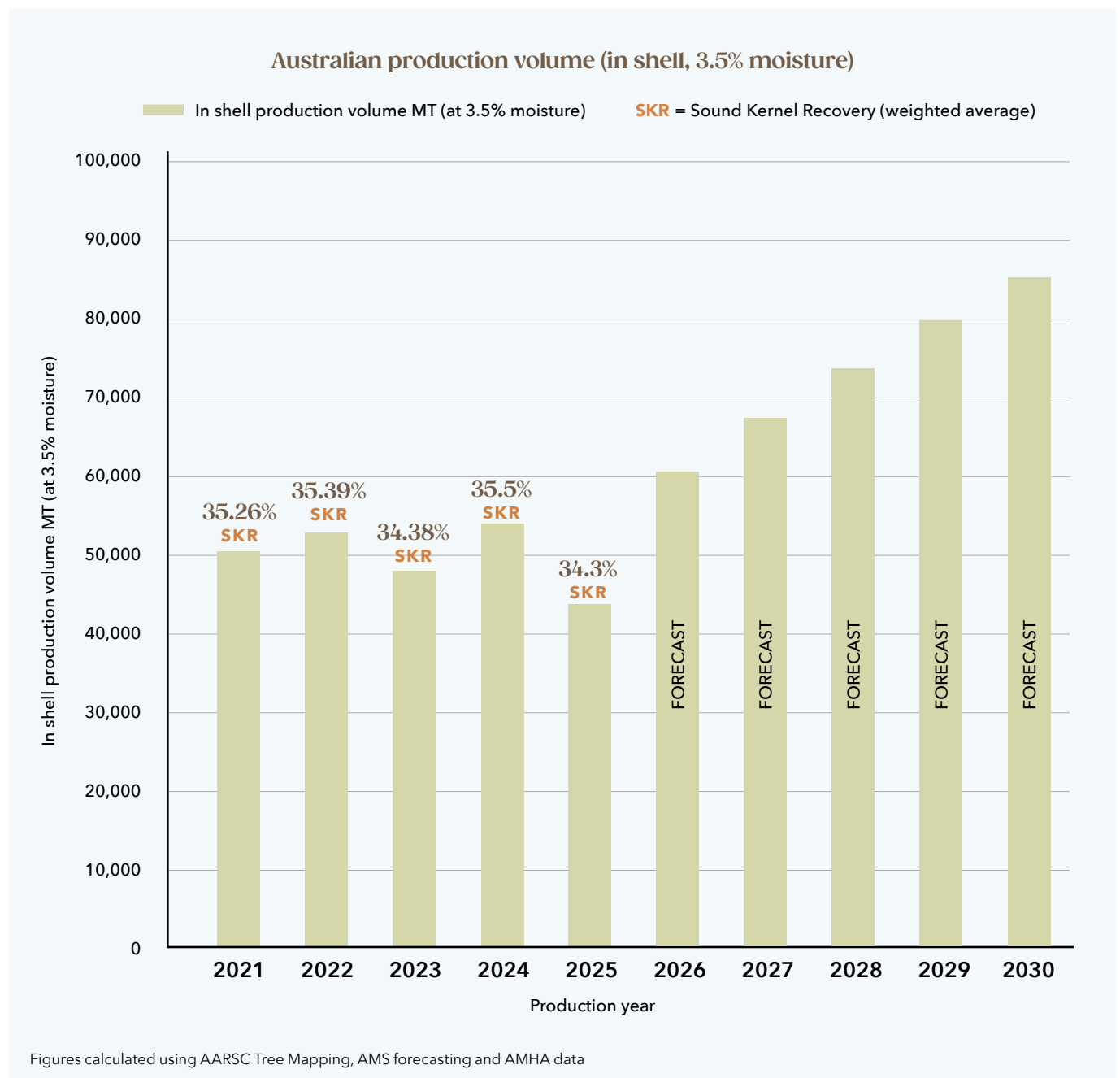
The 2025 harvest season saw severe weather events and associated impacts across all production regions, and the crop result reflected both the scale of the challenges and the determination shown across the industry. Heavy and

prolonged rainfall damaged crops, restricted access to orchards, and pushed harvest well beyond its usual end point. Many growers in both New South Wales and Queensland reported their lowest crops in more than a decade. However, Bundaberg stood out, recording its largest crop to date at close to 30,000 tonnes, driven largely by younger plantings now approaching full production.

Season and productivity

The macadamia growing season can be broken down into three main periods:

August - September:	Flowering begins
October - January:	Nuts begin to form in clusters, their shells harden, and oil rapidly accumulates
February - August:	Mature nuts fall to the ground and are harvested with purpose-built harvesting machinery



Industry insights

Global tree nut production

World tree nut production has been trending upwards over the past decade. Between 2015 and 2025, tree nut production (in-shell basis) experienced a compound average growth rate (CAGR) of 4.5%.

Production of total tree nuts for 2025 is forecast at 13,977,411 metric tonnes in-shell. This is a slight decline from 2024 of 1%.

Cashews and almonds were the largest crops in 2025 (in-shell), accounting for 36% and 22% of the global share, respectively, followed by walnuts (20%), hazelnuts (8.5%), and pistachios (8%). Given the differing kernel yields per nut, the share of production when viewed on a kernel weight basis presents a different picture for the top three nuts, with almonds the largest crop at 32% followed by walnuts (22%), cashews (20%), hazelnuts (10%) and pistachios (10%).

Source: International Nut & Dried Fruit Council (INC) 2025

Global macadamia production

Macadamias continue to account for less than 2% of global tree nut production, underscoring the category's significant long-term growth potential. Global macadamia supply is forecast to increase from around 346,000 tonnes (nut-in-shell) in 2025 to a range of approximately 459,000 to 559,000 tonnes by 2030, with a midpoint estimate of about 509,000 tonnes.

This represents a compound annual growth rate of between 5.8% and 10.1%, with a midpoint growth rate of around 8% per annum. The range reflects differing assumptions around orchard development, yields, climate impacts and investment timing across producing regions.

Macadamia production remains more evenly distributed than other major tree nut crops, with no single country expected to exceed 30% of global supply by 2030. While this geographic spread supports supply resilience, it does not fully insulate the industry from the impacts of major weather events or climate variability.

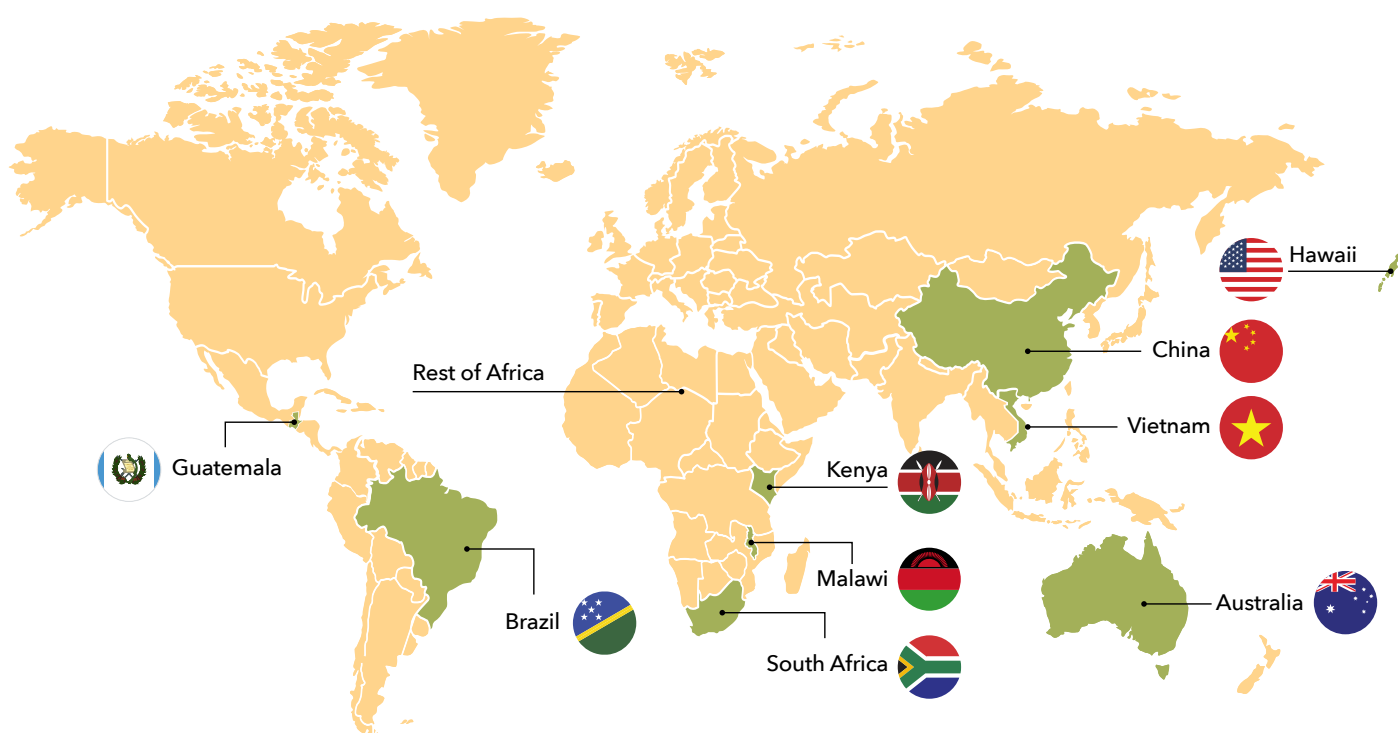
South Africa is forecast to remain the world's largest producer, with production projected to reach 115,000–130,000 tonnes by 2030, followed closely by China at 114,000–134,000 tonnes. Australia is expected to remain the third-largest producer, with output forecast in the range of 76,000–95,000 tonnes by 2030.

Strong growth is also forecast from Kenya, which is expected to continue consolidating its position as a major global supplier, alongside expanding production in Guatemala, Vietnam, Malawi and Brazil. Smaller producing regions collectively make an increasingly meaningful contribution to global supply growth.

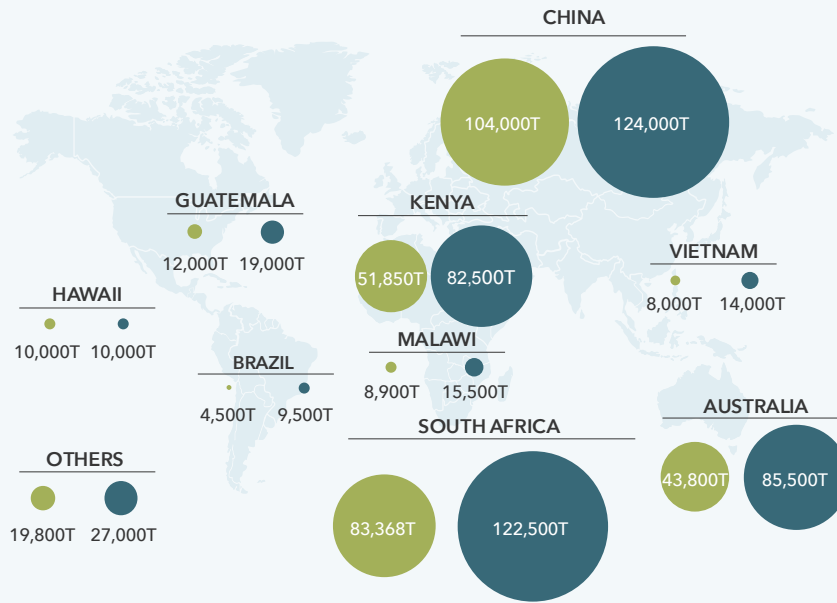
Source: WMO, International Nut & Dried Fruit Council and AMHA for 2025; industry estimates for 2030

Note: Nut-in-shell @ 3.5% moisture

Macadamia producing regions



2025 to 2030 supply map



Country	2030 forecast low (MT)	2030 forecast high (MT)
South Africa	115,000	130,000
China	114,000	134,000
Australia	76,000	95,000
Kenya	70,000	95,000
Guatemala	18,000	20,000
Vietnam	12,000	16,000
Malawi	14,000	17,000
Hawaii	8,000	12,000
Brazil	8,000	10,000
Others	24,000	30,000
TOTAL	459,000	559,000

World

2025F 346,218T

2030F 509,000T

8.0% Compound Annual Growth

● 2025F

● 2030 midpoint

Source: 2025 forecast - WMO Strategic Foundations Committee for South Africa, Australia, Kenya, Guatemala, Malawi, Brazil
2025 forecast - INC November 2025 Nutfruit publication for China; industry estimations for Vietnam, Hawaii, Others

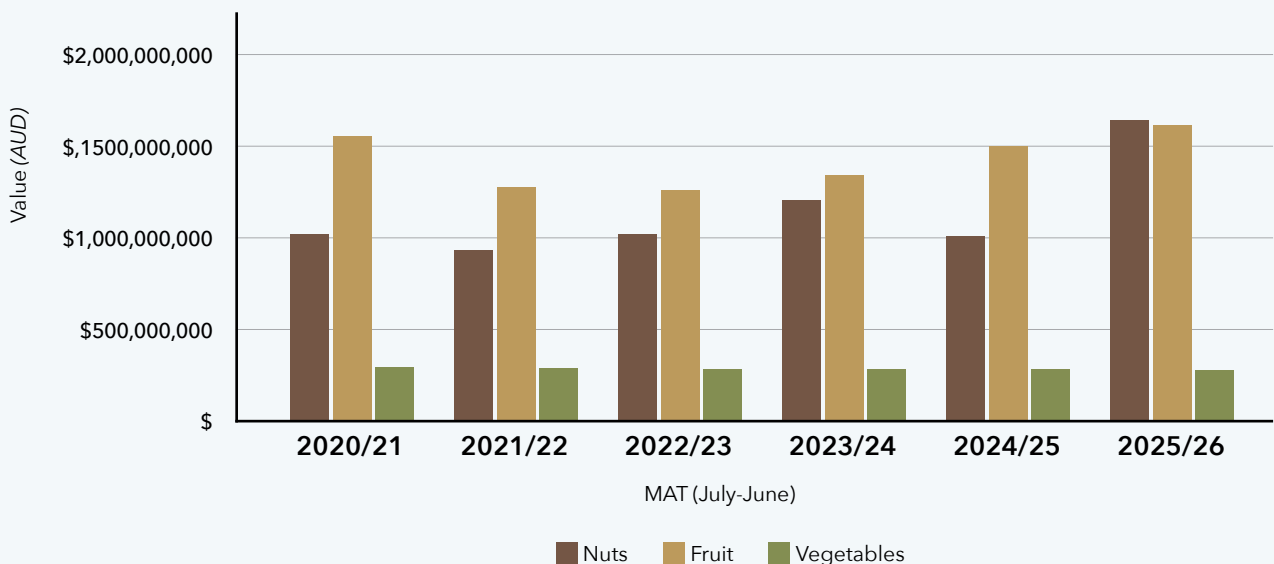
Note: Nut-in-shell @ 3.5% moisture. 2025 forecast subject to final validation by INC, May 2026. Industry estimates for 2030. Estimated low and high points in range, midpoint is average of the range. Others includes Colombia, Mozambique, Myanmar, Rwanda, Uganda, Zimbabwe, Zambia, and other macadamia growing countries.

Australian nut industry

Nuts play a vital role in Australia's horticultural export program, with exports valued at \$1.64 billion in the 12 months to June 2025. Almonds and macadamias represent the vast majority of Australia's nut export value at 94%.

Macadamias are Australia's fourth largest horticultural export and one of the leading horticultural exports from Queensland and New South Wales.

Australian horticultural exports



Source: Australian Bureau of Statistics

Australian macadamia industry

The Australian macadamia industry achieved a crop of 43,800 tonnes (in-shell at 3.5% moisture) for the 2025 season, with around 72% exported.

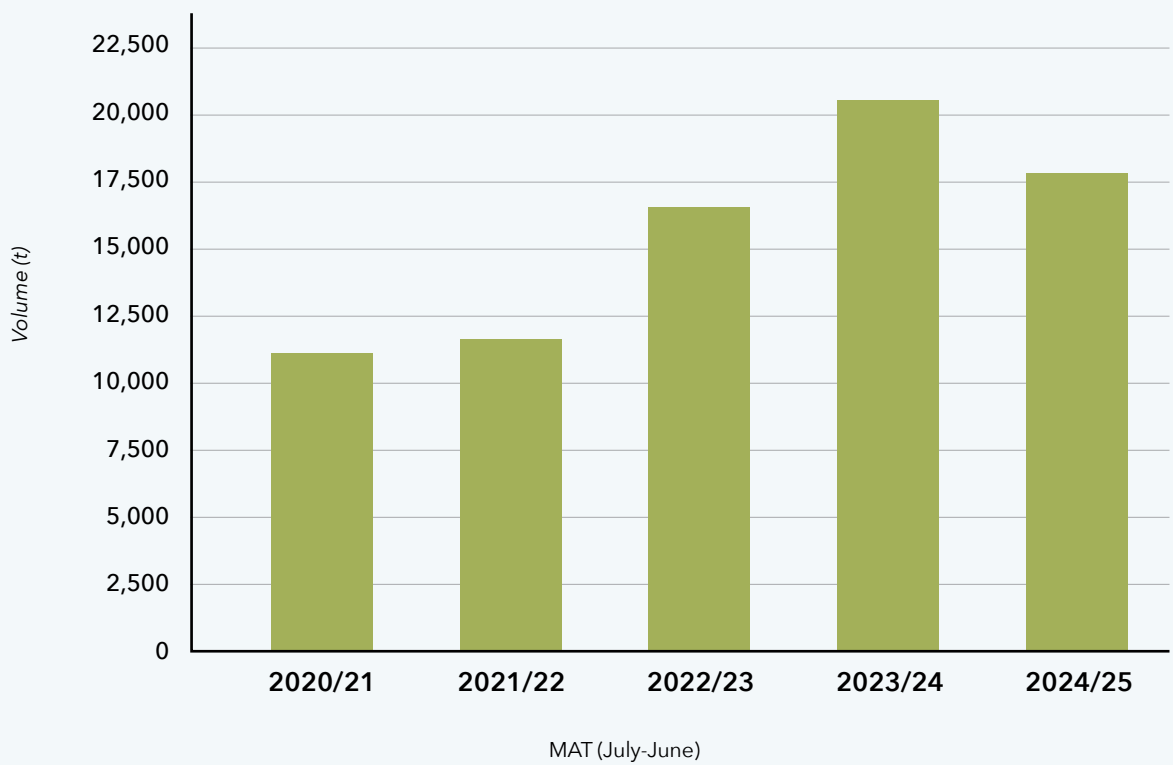
The last decade has seen substantial changes take place in terms of the size and demography of the industry, with an additional 20,000 hectares planted and an increase in professionalism and corporate investment. It's anticipated this will see the crop almost double to 85,440 tonnes (at 3.5% moisture) in 2030.

Australian macadamia sales

While the Australian macadamia industry experienced a challenging season on the production front, kernel sales were strong overall, up 5.6% on prior year. In-shell sales were down 15% from the prior year's record of 20,894 tonnes.

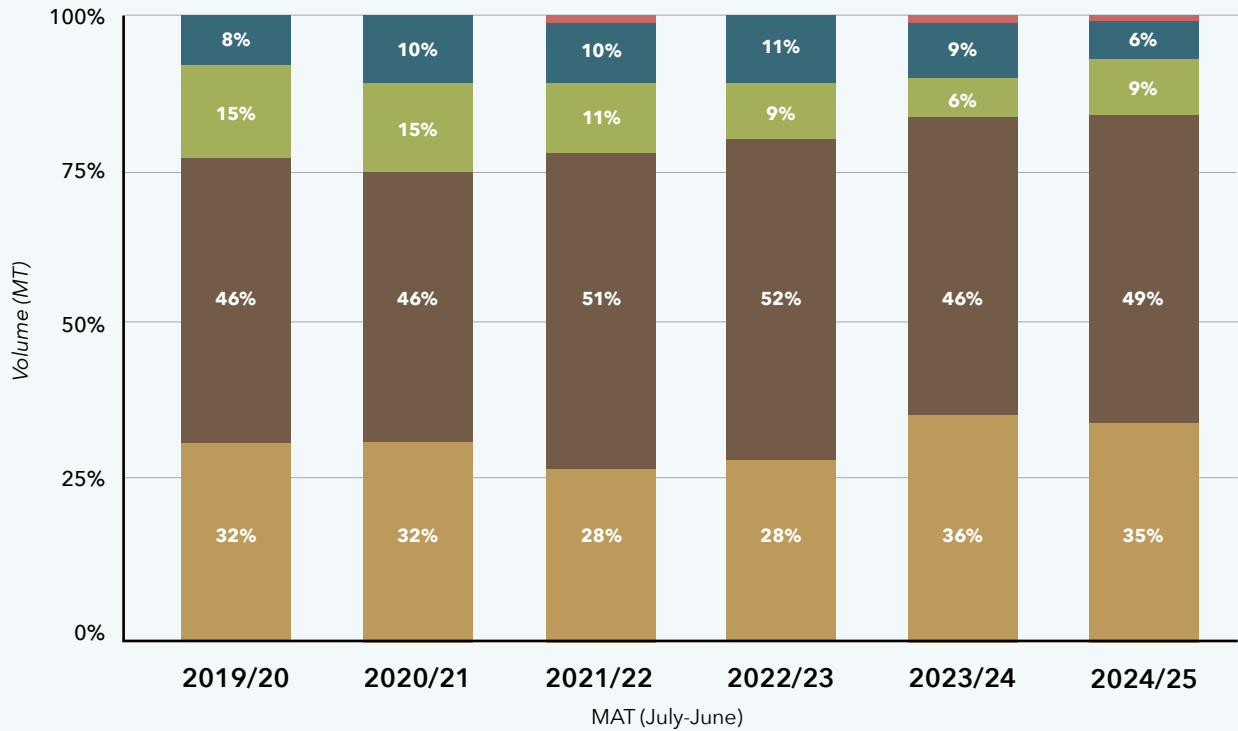
Kernel sales to the domestic market increased 1.7% from 3,993 tonnes in 2023/24 to 4,062 tonnes in 2024/25. Sales across export markets varied: Japan (-0.9%), Korea (+4.2%), USA (-29.4%). Strong growth was recorded in Germany (121%), Other Europe (46.5%), Other Asia (60%) and Taiwan (31%) albeit off smaller bases. 84% of Australia's kernel sales were to the Australian and Asian region.

Australian in shell sales (volume)



Source: Australian Macadamia Handlers Association

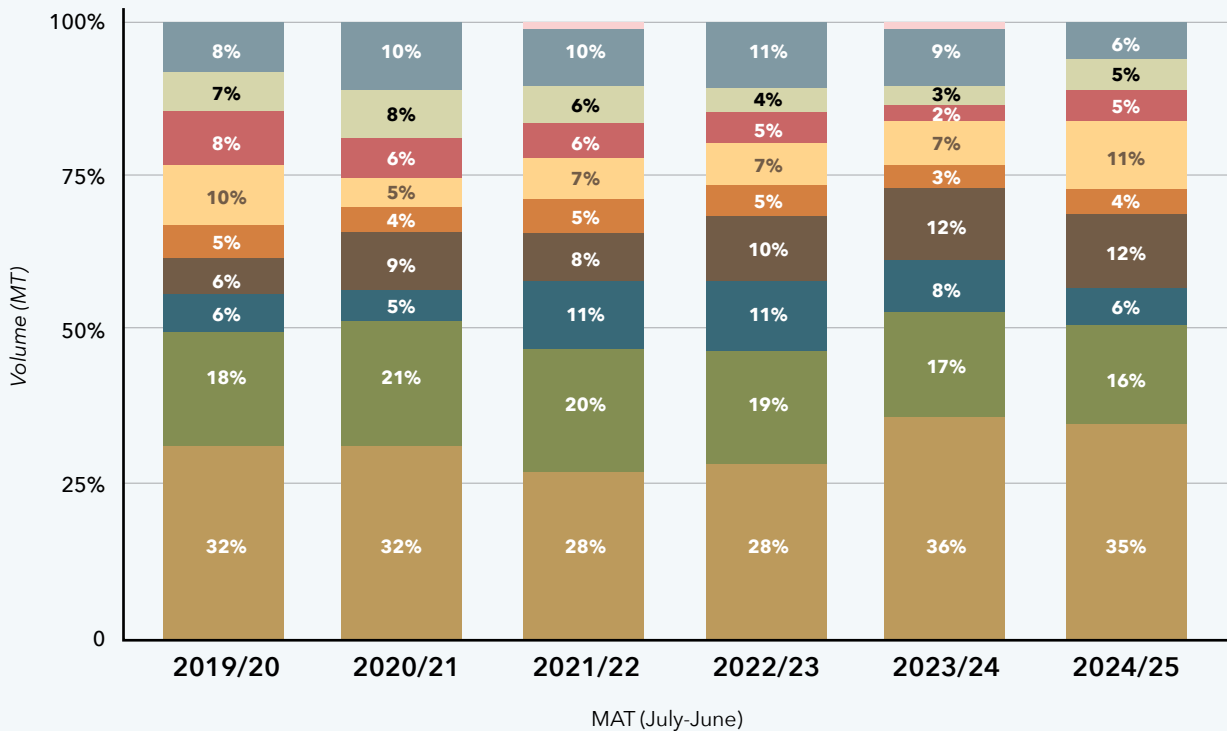
Australian kernel sales distribution by region (volume)



Source: Australian Macadamia Handlers Association

Domestic Asia Europe USA Other

Australian kernel sales distribution by market (volume)



Source: Australian Macadamia Handlers Association

Domestic China Taiwan Germany USA
Japan Korea Other Asia Other Europe Other

Working with nature for a sustainable future

Innovative thinking and a collaborative spirit continue to drive the Australian macadamia industry's pursuit of consistent high-quality yields and long-term sustainability.

With the call for sustainable production growing louder every year, the responsibility to produce the world's best macadamias as eco-sensitively as possible is felt and shared by everyone from the largest operators in the processing sector right through to new growers navigating their first season.

A deep commitment to sustainable farming

Australia is recognised internationally as a clean, green and reliable food producer. Australian macadamia growers are deeply committed to sustainable production and believe the actions they take on-farm today must benefit the environment and people in the future.

Feeling a true affinity for the land on which they farm, Australian macadamia growers take great care to develop and implement ecologically sensitive techniques to protect the natural environment. Our industry invests millions of dollars in research every year to ensure our practices are the world's best and that the natural resources on which our industry relies to grow this delicious wholefood are managed as efficiently as possible.

More Australian growers than ever are now actively monitoring and measuring their operation's sustainability practices, delivering the data and transparency that today's market demands.

Working with nature from the ground up

As growing and orchard management practices become more advanced, so too does understanding of the environment and how it is changing. Macadamia growers remain committed to conserving the natural resources on which their product relies, and now more than ever, are prioritising the protection of the water, soil, air, native vegetation and wildlife.

While growers have been challenged by a year of variable weather, they have continued to focus on working with nature to consolidate orchard fundamentals.



- **Soil health:** By increasing soil carbon, mulch and living ground cover to replicate a rainforest floor environment, growers are nurturing soils that take up and conserve water and creating a more resilient orchard floor that can stop evaporation and mediate soil temperature.
- **Biodiversity:** Macadamia orchards are living ecosystems. The trees themselves provide habitat and food sources for countless species, supporting biodiversity in ways few other crops can. Growers are planting diverse ground covers and native vegetation between tree rows and around orchards to build biological resilience, create refuges for beneficial insects and pollinators, and encourage natural predators that help keep pests in check.
- **Canopy management:** Sunlight and airflow are natural enablers of a healthy crop and help to maintain a balanced orchard ecosystem. Open, solarised trees through proactive management help suppress disease, support healthy groundcover and underpin efficient nut production.
- **Waterways and marine estates protection:** Growers continue to invest in diverse vegetation within and surrounding orchards, along riparian zones. By adopting natural orchard management practices they are protecting water quality, mitigating runoff and using inputs efficiently. Macadamias are also leading the way in Reef Certified farming in macadamia Reef catchments. This reflects the industry's strong stewardship of land and water in regions that border the Great Barrier Reef.

Macadamia trees are largely grown in the locations where they naturally evolved more than 60 million years ago, meaning it is a crop that has naturally adapted to its environment. This natural advantage and inherent resilience coupled with the ongoing improvements growers are making will ensure the industry can continue to produce a high quality, consistent crop.

Answering the call for sustainable ingredients

The era of meeting demand at any cost is well and truly gone as businesses, governments and consumers across the globe grapple with the environmental impacts of their choices large and small.

Once considered a secondary focus, sustainability is now central to ingredient innovation. As Mintel notes in *The Future of Ingredients 2025*, the food and drink industry is entering a period of "bold transformation" driven by climate change, resource scarcity and shifting consumer expectations.

Advances in regenerative agriculture, circular production models and biotechnologies are reshaping how ingredients are sourced, produced and consumed. This shift reflects rising consumer demand for transparency and accountability, alongside a long-term commitment to planetary health. These drivers are "redefining industry standards, paving the way for a future where food nourishes both people and the planet in harmony"¹.

Manufacturers already understand the taste, texture, health, luxury and plant-based cues macadamias can add to products. Macadamias grown in Australia deliver powerful, research-backed sustainability credentials too, from water use efficiency and carbon sequestration to minimisation of carbon outputs, recycling of by-products and world's best biological control.

1. Mintel, *The Future of Ingredients 2025*, February 2025.



A framework for the future

In the globalised supply chain, consumers are increasingly seeking transparency about where their food comes from and how products are produced. Similarly, supply chain companies and their shareholders, markets and investors are seeking evidence of high standards of product safety, workplace ethics and environmental care.

Hort Innovation has developed the Australian-grown Horticulture Sustainability Framework, a guide for understanding and measuring the many elements of sustainability of Australian-grown horticultural production and setting goals for the future. The Australian macadamia industry has started using this to develop its own industry approach.



The Australian-grown horticulture sustainability framework provides a logical process to measure how Australian horticulture is tracking on key sustainability issues. With this information, Australian horticulture, its industries and businesses can:

- Measure and track the sustainability of their production systems
- Work towards safe, ethical and environmentally sustainable production practices
- Find simplified ways to gather or model data on the sustainability metrics of production systems to meet supply chain needs and reduce burden on individual growers
- Work together on common challenges across the sector
- Target research
- Tell their story of sustainable production
- Protect and grow access to investment and finance
- Strengthen relationships and transparency with stakeholders.

Precision agriculture and mapping – tools for the future

Modern mapping and precision agriculture technologies are helping growers monitor orchards in real time, understand variability and make better resource decisions.

While large-scale industry mapping once focused on locating trees and assessing storm or flood damage, it's now used as a future-readiness tool that supports biosecurity response, efficient irrigation, and sustainability benchmarking.

The mapping of wild macadamias has also been critical for identifying and protecting this rare genetic heritage.

Using R&D to drive ongoing improvement

Australia's macadamia industry leads the world in terms of on-farm research and development. More than three decades of commitment to R&D has laid the foundation for growers to develop practical solutions that ensure consistent supply of premium quality macadamias.

The industry invests over \$5 million in R&D annually through levy and other industry and research agency investments. Recent years have seen a surge in grower-led innovation as well, with many growers investing in their own trials and implementing innovative new practices on farm as a result. Adoption of new technology, enviro-monitoring and more efficient, targeted and precise irrigation scheduling are paving the way for continued long-term growth in Australian macadamia production.

These important investments will help to improve productivity while aligning with environmental stewardship and sustainable practices.

Following completion of the Hort Frontiers Funded Tree Intensification initiative, the industry has reinvested in a new program, "Maximising Macadamia Yield", which focuses on understanding tree physiology and resource-use efficiency to improve productivity under variable climatic conditions.

Advances in pollination brought about by improved understanding of its importance and of which insects pollinate most effectively has resulted in cross-pollination becoming a significant consideration when planting new orchards. The Hort Frontiers Pollination Fund covers multiple crops including macadamias, and this has seen many growers adopting pollination services and redesigning their orchard landscapes to create a safe harbour for natural pollinators. Pollination contributes to greater yields and better kernel recovery, again proving that working with nature is often the best strategy.



2025 saw ongoing R&D investment in the following areas:

- Integrated pest management*
- Integrated disease management*
- Industry benchmarking which includes a sustainability pilot*
- Pollination practices, pollinator health studies and gap analysis*
- Multiple water quality projects including reef certifications and marine estuary health
- Macadamia physiology to understand how climatic signals influence the inner workings of the tree in response to climate variability*
- Macadamia orchard mapping

**These research projects have been funded by Hort Innovation, using the macadamia research and development levy and contributions from the Australian Government. Hort Innovation is the grower owned, not-for-profit research and development corporation for Australian horticulture.*

Serious about food safety and quality

Food safety is a top priority for Australia's macadamia industry. Its approach is underpinned by sophisticated production processes, generations of knowledge about quality on farm and in factory, a commitment to biological pest control, and Australia's reputation as a clean and green environment.

The Australian macadamia industry has rigorous food safety & quality standards, and testing protocols. Good agricultural practice (GAP) on farm underpins a quality and food safety focus that extends throughout the supply chain.

All processors are HACCP certified and most have additional quality management systems, to ensure compliance from orchard to end customer.

Advanced traceability systems across the supply chain ensure confidence in Australian macadamias delivering to customer expectations.

Australia's standing as the producer of premium quality macadamias is validated by the results of the Australian Government's National Residue Survey, a program that screens Australian crops for a range of chemical pesticides and environmental contaminants. Australia's macadamia industry has achieved strong compliance in the NRS, maintaining a superior record every year since the Survey's inception in 1996.

At a glance: the Australian macadamia industry's sustainability and productivity initiatives



Precision agriculture

Precision agriculture is helping the industry stay productive, resilient and climate-ready. Growers are embracing digital tools like mapping, soil monitoring probes, weather stations and remote sensing to make precise, evidence-based decisions. These technologies help fine-tune irrigation, fertiliser use and pest monitoring, cutting waste and improving resource efficiency. By tracking soil and climate variability in real time, growers can adjust quickly to seasonal changes, protect soil and water, and maintain consistent yields.



Integrated orchard management

Integrated management of canopy, orchard floor and drainage.

• CANOPY

Light and ventilation in the orchard improves productivity but also supports biodiversity - the beneficial insects and birds that keep pests at bay thrive in these conditions. Sunlight also acts as a natural solariser, helping control disease, maintain healthy groundcover and drive production.

• ORCHARD FLOOR

The orchard floor is the engine room for production - rich in organic matter, covered with diverse plants, holding adequate moisture and teeming with soil life that supports both biodiversity and yield.

• DRAINAGE

Effective drainage keeps precious soil where it's meant to be and helps orchards withstand extreme weather, making macadamia systems more climate resilient.



Integrated pest and disease management

Combining a range of strategies including biological controls and cultural farm practices, IPDM continues to be a significant investment for the industry. By creating a pest suppressive landscape and monitoring and understanding pest lifecycles, growers can better discern when intervention is needed.



Improved soil erosion management

Significant work has been undertaken to better mitigate soil erosion using whole farm planning and re-contouring that helps balance nutrients, prevent run-off, and monitor and manage water quality. The use of cover crops plays an important role in this area, encouraging beneficial insects while retaining soil and moisture levels.



Biological control and diversity

Collaborative research examining biological control is currently being undertaken by multiple research agencies. This will build on the industry's use of naturally occurring organisms to control pests and disease. Orchards are now boasting more diversity than ever, with many growers establishing inter-rows in their orchards to create habitats for beneficial insects, native bees and other pollinators such as flies and beetles. This is delivering production benefits as well as a more sustainable way of growing. Programs that support barn owl perches and hollows in orchards are strengthening ecosystem balance and reducing synthetic inputs.



Revegetation and restoration of riparian zones

Riparian zones are extremely sensitive to any activity occurring in and around them, with careful management required to ensure there is no adverse impact on the waterways. The industry is restoring these precious zones and planting more native vegetation to encourage biodiversity and natural resilience, control erosion and create a naturally pest-suppressive landscape.



Increase in use of European and native bees

Insect pollination by both managed and naturally occurring bees and other insects are beneficial to the crop.



Nothing wasted

The macadamia industry is making inroads to developing a circular economy. 100% of the harvested nut is used, with nothing going to waste. The husk is used as mulch and compost and the shell is used for co-generation of electricity in macadamia processing plants. Some macadamia processors are now repurposing their nutshell waste into biochar, which is the result of burning macadamia shells at a high temperature in a special, low oxygen environment. Used as a soil enhancer, biochar makes soils more fertile and stores carbon in the soil so it's not released as a greenhouse gas. Biochar production creates bio-oil and gas by-products that can be used as fuel for renewable energy plants.



Breeding programs

Macadamias are part of some long term breeding programs that capitalise on the selection of natural favourable characteristics, not genetic modification. The MCT1 macadamia cultivar was produced following a long breeding history and testing in multiple regions. It has gone on to become one of the most sought-after varieties in the industry. The levy-funded breeding program has produced four elite varieties which are starting to be planted more widely. It is anticipated these could be game-changing for productivity.

Wild Macadamia Conservation

To secure the industry's future, it's important to preserve the past. It's a little-known fact that macadamias are native to Australia.

They originated in the rainforests of the east coast 60 million years ago and Australia is the only country in the world where macadamias grow wild. From South Africa to Hawaii, China to Kenya, every single macadamia tree in the world can be traced back to the wild macadamia trees that still grow in the Australian rainforest.

Over millions of years macadamias retreated to favourable niches in the rainforests along the east coast from Gladstone in Queensland to northern New South Wales. But since European settlement, up to 90% of wild macadamias have been lost due to land clearing, with wildfires, grazing, weeds and climate change posing ongoing threats to their survival. There are four wild macadamia species, all of which are now classified as either vulnerable or critically endangered by the Australian government.

Conserving the genetic diversity found among all four endangered wild species plays an important role in securing the future of the macadamia industry. Wild macadamias offer a wealth of genetic diversity and many of the commercially grown macadamia cultivars the industry relies on today are from a very narrow genetic base. The DNA of wild macadamias holds significant untapped potential for development of the macadamia industry world-wide. It could hold the key to breeding commercial macadamia cultivars that are not only more productive, but better adapted to changing weather patterns, and emerging pests and diseases.

As the only home of wild macadamia trees, Australia is the guardian of this diversity. The Australian Macadamia Society (AMS) established the Macadamia Conservation Trust (MCT) in 2007 to work with community groups and government to conserve wild macadamia trees. This year, the Trust evolved into an independent environmental charity, Wild Macadamia Conservation, dedicated to supporting and conserving Australian wild macadamia trees and their native habitat.

Community planting includes Macadamia ternifolia in habitat restoration (Image courtesy of Hinterland Bush Links)





The challenging terrain in which *M. jansonii* grows
(Image courtesy of Keith Sarnadsky)



Precious potential for survival of critically endangered *M. jansonii*
(Image courtesy of Keith Sarnadsky)

Australia now has a National Recovery Plan to guide protection of wild macadamias.

The first Recovery Plan for macadamias, adopted in 2012, was commissioned by Horticulture Australia Limited and the AMS in recognition of the value of wild macadamias as genetic reservoirs for macadamia farmers both in Australia and internationally. The AMS is the only industry body in Australia to initiate a recovery plan for conservation of the wild species on which its industry is based.

2023 delivered a significant milestone in the form of a National Recovery Plan made jointly by the Federal and Queensland State Governments to guide the protection of Australia's precious but endangered wild macadamias. Just as we rely on other countries to safeguard genetic resources for most of the food we eat, Australia has an obligation to look after the genetic resources of our native nut. Protecting wild macadamias and their habitat will conserve high value forests including endangered and critically endangered ecological communities.



Wild *M. integrifolia* at Mount Cotton about to flower
(Image courtesy of Liz Gould)



M. integrifolia grows tall in the wild (Image courtesy of Liz Gould)

Wild Macadamia Conservation, an organisation dedicated to protecting Australia's wild macadamias and their habitat, would not have been possible without the support of the AMS. The two organisations will continue to work together to protect the genetic heritage of this remarkable nut.

In 2025 Wild Macadamia Conservation supported on-ground conservation efforts at Mount Cotton in Queensland's Redland Shire, along the Blackall Range on the Sunshine Coast and in Bulburin National Park near Bundaberg. A new version of the Wild Macadamia App was launched, allowing people to see if they live near wild macadamias, and identify which species they should be planting to maintain integrity of the original populations.

The organisation is also investing in research that will inform conservation strategies and expand industry understanding of this species and its requirements. Two new projects supported by Wild Macadamia Conservation focus on identifying and protecting genetic resources. Dr Alice Hayward leads a project to develop techniques for banking genetic resources that cannot be stored using

conventional methods, with the Critically Endangered *Macadamia janseni* one of the test species. Associate Professor Craig Hardner leads another project to develop a rapid, low-cost method for genotyping by sequencing, making it easier to check the genetic identity of individual macadamias and enabling targeted conservation efforts.

A new project funded by the Ian and Janet McConachie Macadamia Conservation Grant will pioneer the use of computer learning to locate additional wild macadamia trees in the Northern Rivers - the region most affected by historical clearing. Wild populations will then be monitored to identify which insects (both pests and beneficials) and pollinators visit the trees in their original habitat.

The Macadamia - Australia's Gift to the World, a book by Ian McConachie AM released in 2024 continues to raise funds for Wild Macadamia Conservation and build awareness of Australia's unique nut.

Section 2: Health



Macadamia health and wellbeing benefits

Macadamia nuts are a natural source of nourishment that support overall wellbeing and deliver specific health benefits, including heart health support and providing sustained energy.

Macadamias contain the highest levels of 'good' monounsaturated fats of any nut - and among the highest of any food. These healthy fats support heart health and can help reduce the risk of heart disease. They also provide a sustained energy release, making macadamias a satisfying ingredient or snack that can help support satiety and energy levels.

As an unprocessed, plant-based wholefood that comes directly from nature, macadamias offer nutritional benefits while aligning with the growing consumer preference for foods that are both good for people and the planet.

Good for you fats

Macadamias are the number one tree nut source of monounsaturated fats - the 'good' fats that are beneficial for heart health.

Gone are the days of believing that low fat is better. Today, the role of fat in both flavour and nutrition is widely recognised. Fat enhances the mouthfeel and taste of food, assists with the absorption of fat-soluble nutrients such as vitamin E, and helps maintain satiety. However, not all fats are equally beneficial. When referring to 'good fats,' it typically means unsaturated fats.

Macadamias are the leading tree nut source of the 'good' monounsaturated fats, which, together with polyunsaturated fats, are associated with supporting heart health and reducing the risk of heart disease.^{1, 2, 3}

'Good' versus 'bad' fats

The difference between 'good' and 'bad' fats lies in their chemical structure. Monounsaturated fats contain one double bond in the carbon chain that forms the backbone of the fatty acid. This single bond makes them very stable and resistant to oxidation. Oxidation can damage cells⁴ - which is why antioxidants play an important protective role - but the fats in Australian macadamias are naturally more resistant to this process.

The role of 'good' fats in overall health

Macadamias contain predominantly monounsaturated fats, with smaller amounts of polyunsaturated fats. The main monounsaturated fats are omega 7 and omega 9, while the polyunsaturated fats include a favourable ratio of omega 6 to omega 3. Together, these healthy fats support heart health, help maintain healthy cholesterol levels and assist the body in absorbing fat-soluble vitamins and other essential nutrients. This naturally balanced fat profile makes macadamias a valuable addition to a healthy diet, and enjoying a handful each day is a simple and satisfying way to increase intake of these beneficial fats.

Heart healthy

Macadamias are both delicious and naturally high in beneficial monounsaturated fats that support heart health.

The scientific evidence around macadamias and heart health continues to grow.

In 2025, a systematic literature review showed that regularly eating nuts is associated with a lower risk of cardiovascular disease (CVD).⁵

Macadamias and healthy cholesterol

Regular nut consumption as part of a balanced diet is associated with a reduced risk of death from heart disease and a reduction in risk factors for cardiovascular and coronary heart disease.^{5, 6} Regular consumption of nuts such as macadamias has been shown to improve the ratio of 'good' (HDL) and 'bad' (LDL) cholesterol.⁷

Heart-healthy plant sterols

Macadamia nuts are also rich sources of phytosterols - natural, cholesterol-like substances found in many plant foods. Plant sterols can reduce cholesterol levels by being absorbed instead of some of the 'bad' (LDL) cholesterol, resulting in lower blood cholesterol levels.⁸

Helping healthy blood pressure

Macadamias can also contribute to maintaining healthy blood pressure. They contain the amino acid arginine, which acts as a precursor to the chemical messenger nitric oxide that causes blood vessels to dilate and remain elastic. This can reduce blood pressure, among other benefits.⁹

Including macadamias as part of a balanced diet provides a natural way to support heart health into the future.

Nature's energy balls

The healthy fats, fibre and nutrients in macadamias provide an instant and sustained energy boost.

In today's fast-paced world, consumers are seeking convenient snacks that not only taste great but also deliver lasting energy. Macadamias are a naturally nutrient-rich snacking option that satisfy cravings while providing nourishment.

The ideal snack

Many common snack choices are energy-dense without being nutrient-dense. Confectionery, for example, is high in sugar but offers little nutritional value. Macadamias are different - they are both energy-dense and nutrient-dense¹, and they taste delicious as well.

A source of healthy fats, dietary fibre, plant protein and essential nutrients, macadamias help maintain satiety and keep energy levels steady. As a naturally low-carbohydrate food, they provide a slow, sustained energy release that supports fullness and helps curb excessive calorie intake. They also digest slowly and have minimal impact on blood glucose levels.

Macadamias are also convenient. They're easy to carry or store for a quick, wholesome snack at work, while travelling or between meals.



Long-lasting energy

Replacing typical afternoon snacks with a handful of macadamias offers a flavourful way to keep you going. Paired with fresh fruit and yoghurt, added to smoothies, or enjoyed as macadamia nut butter on wholegrain toast, they make an ideal option for a quick boost before an afternoon workout or evening exercise. These simple combinations provide a sustained release of energy to fuel activity and support overall wellbeing.



A natural choice

Free from additives, macadamias are a nourishing food direct from nature that fit easily into a balanced, healthy lifestyle.

Australian macadamias are more than just a snack – they are a pure wholefood with deep roots in their natural origins. Native to Australia, macadamias thrive in the regions where they evolved more than 60 million years ago, requiring minimal intervention to flourish.

Unprocessed and free from additives, they offer a natural way to support nutritional needs without compromising on flavour or satisfaction. Naturally gluten, grain and dairy free, macadamias suit a wide range of dietary preferences, from vegan and vegetarian to keto and Mediterranean.

A nutritional powerhouse

These creamy, buttery nuts are as naturally beneficial as they are sustainable. Containing healthy fats, fibre, antioxidants and essential nutrients – including manganese, which supports skin health and helps reduce inflammation – macadamias deliver exceptional nutritional value in every bite. Their healthy fats also assist the body in absorbing fat-soluble vitamins, making macadamias a genuine nutritional powerhouse for everyday wellbeing.

Nuts that nurture the earth

Choosing Australian macadamias supports a sustainable local industry. With more than 14 million trees across 46,000 hectares, orchards act as living forests – stabilising soil, fostering biodiversity and sequestering 17.6 tonnes of carbon per hectare each year.¹⁰ Grown in harmony with nature, macadamias are good for people and for the planet.

Diabetes friendly

With their healthy fats and low carbohydrate and sugar profile, macadamias have a GI lowering effect.

Macadamias offer a satisfying way to support balanced blood glucose levels without compromising on flavour. Enjoying macadamias alongside carbohydrate-rich foods such as breakfast cereals, rice dishes or fruit can also help lower the overall GI of a meal by slowing digestion and the release of glucose into the bloodstream.¹¹

Good for blood sugar control

Thanks to their low carbohydrate content and balance of healthy fats, protein and fibre, macadamias help moderate post-meal blood glucose spikes. Research shows that eating nuts can improve blood glucose levels in people with type 2 diabetes, while nutrients such as polyphenols and fibre in macadamias also support better insulin function. Their healthy fats work synergistically to reduce demand on insulin production, helping create a steadier insulin response.¹¹

Diabetes management and prevention

Macadamias are also rich in manganese – providing 28% of the recommended intake per serve – an important mineral linked to improved regulation of blood glucose levels. People with diabetes or pre-diabetes face a higher risk of heart disease, and the heart-healthy nutrients in macadamias help support cardiovascular wellness too.¹² Beyond management, regular nut consumption may reduce the risk of developing type 2 diabetes. A review of studies involving more than 500,000 people found that eating 30 grams of nuts at least four times a week lowered diabetes risk by 13%.¹³ This provides another compelling reason to include a daily handful of macadamias as part of a balanced diet.



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Nuts for Life

Nuts for Life is Australia's voice for the vital role nuts play in good health and nutrition

On behalf of the nut industry, Nuts for Life works closely with health and food professionals, government, and other bodies to improve the nutritional reputation of nuts.

Nuts for Life is facilitated by the Australian Nut Industry Council in partnership with Australian nut industry members, from all sectors of the supply chain.

It is funded through Frontiers developed by Hort Innovation, with co-investment from the Australian nut industry, and contributions from the Australian Government.

2025 Nuts for Life highlights

REFRAMING THE CALORIE EQUATION

Despite strong evidence that nuts support healthy body weight, misconceptions about their calories and weight gain persist. Nuts for Life addressed this throughout 2025 via three key stories:

1. **The Weighty Truth.** Nuts do not cause weight gain in the short term and likely support improved weight maintenance in the long term.
2. **The Vanishing Calorie.** Nuts reduce feelings of hunger, leading to fewer calories consumed later in the day. The true calorie content of nuts may be up to 26% lower than what is listed on nutrition labels.
3. **The Metabolic Advantage.** Calorie quality (not just calorie density) plays a key role in shaping metabolism, satiety, and weight outcomes. Nuts support metabolic function, in part due to their unique food matrix.

These stories have been shared widely with the Nuts for Life audience, including via a webinar, a podcast episode, and social media engagement. This activity was supported by new infographics outlining the evidence around the nuts-weight paradox.





NEW RESOURCES

Nuts and weight infographics

To support the new nuts and weight narrative, a series of new graphics were created to explain how nuts support a healthy weight.



'Everything you need to know about nuts' resource suite

A new fact sheet, magnet and large-format poster were released to help health professionals answer the most frequently asked questions about nuts.



HEALTH AND FOOD SERVICE PROFESSIONAL EDUCATION

Strong engagement with key audiences was maintained throughout the year, reaching nearly 6,000 health and food service professionals through:

- Sharing of new resources
- Trade exhibits at major conferences including General Practice Continuing Education and Foodservice Australia
- Delivery of two highly engaging webinars, one of which has been viewed more than 1,000 times (*Reframing the Calorie Equation*, hosted via Dietitian Connection)
- Monthly e-newsletter *NutENews* keeps almost 5,000 professionals up-to-date on the latest in nuts and health
- Nuts for Life website underpins all communication activities, with more than 281,000 page views across the year

INFLUENCING PUBLIC HEALTH POLICY

Australian Dietary Guidelines

Nuts for Life submitted 65 scientific research papers to the National Health and Medical Research Council in response to its call for evidence on protein-rich foods, plant proteins, and chronic disease management. The updated Australian Dietary Guidelines are expected to be published in late 2026.

Food Standards Australia and New Zealand (FSANZ)

Nuts for Life made a submission to FSANZ advocating for an automatic 5-star Health Star Rating (HSR) for nuts as part of its preparatory work to mandate the HSR system. In parallel, a campaign is underway to build broader support, from key policy influencers, for HSR reform.

Media outreach

In collaboration with a PR partner, Nuts for Life gained media cover that generated more than 500 million opportunities to see across online media and podcasts. This coverage centred on ground-breaking research showing that eating a handful of nuts daily can reduce premenstrual syndrome symptoms in women by 41%.

For further information on Nuts for Life activities

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Section 3: Consumer Insights



Understanding how consumers choose and enjoy macadamias

- ✓ A source of healthy fats
- ✓ Dairy-free ingredient
- ✓ Highly satiating
- ✓ A source of plant-based protein
- ✓ More luxurious than other nuts
- ✓ Indulgent and premium
- ✓ Suitable for gifting
- ✓ Suitable for casual gatherings
- ✓ Most popular nut for relaxing alone
- ✓ A healthy and delicious snack

Consumers continue to make food choices with health, taste and provenance front of mind. Snacking has become a key part of how people manage their wellbeing, while interest in functional benefits, natural ingredients and sustainably grown foods remains strong. Within this landscape, macadamias perform exceptionally well, combining indulgence with nutrition and a premium image that resonates globally.



Macadamias: more than a snack

Macadamias are firmly established as both a snack and a sought-after ingredient.

- **80%** of consumers have purchased a product *because* it contained macadamias.
- Top categories include **chocolate-coated nuts (33%)**, **baked goods (32.5%)**, **chocolate bars or blocks (28%)**, and **ice cream or gelato (24%)**.

Consumers want to see more macadamia innovation.

More than a quarter of consumers want to see macadamias featured more often in:

- **Baked goods (36%)**
- **Chocolate-coated nuts (35%)**
- **Chocolate bars (32%)**
- **Ice cream and gelato (28%)**
- **Cereals or granolas (26%)**

Snacking for energy, mood and nutrition

As a healthy, delicious and energy-boosting nut, macadamias can cater to the snacking needs of today's consumers.

- **60%** of consumers snack multiple times a day
- **75%** snack to boost energy
- **68%** snack to manage their mood
- **Three in four** are seeking ways to snack healthier
- Nutritional value and taste are the biggest influences on snack choice
- **70%** of consumers snack on nuts daily or weekly

Premium, indulgent and delicious

Macadamias hold a unique position among nuts as a symbol of quality and luxury.

- **33%** of consumers associate macadamias with *luxury* - higher than any other nut.
- **34%** regard them as *premium*, and more than one in four say they're the *best nut for gifting*.
- The strongest associations overall are *healthy*, *tasty* and *indulgent*, with **taste (58%)** and **nutritional value (43%)** the top reasons for consumption.

How people are enjoying macadamias

- **34%** as a snack on their own
- **32%** to boost health and wellbeing
- **29%** as an ingredient in a product
- **27%** in baking
- **22%** added to meals

They also feature strongly in treat occasions, with people choosing macadamias as:

- **A healthy treat (44%)**
- **An occasional treat (44%)**
- **A mood boost (33%)**

Food is about more than just hunger

Consumers are seeking a broad spectrum of functional benefits from the food they eat. Macadamias are well placed to meet many of these needs.

- **48%** prioritise healthy snacks
- **42%** look for foods that boost energy
- **42%** focus on maintaining a healthy body weight
- **42%** want fibre for digestion and gut health
- **39%** seek foods that support healthy ageing

Consumers continue to value where and how their food is grown

The Australian macadamia provenance story remains important to consumers

- **59%** say country of origin is important when buying macadamias
- **65%** of respondents globally know that macadamias are grown in Australia
- **69%** believe Australian macadamias taste better
- **73%** believe Australian macadamias are superior quality
- More than half (**51%**) of consumers know macadamias are native to Australia

Which nut and why?

Taste is the #1 factor that determines consumers' nut choice globally.

Macadamias are considered one of the **top 3 tastiest** nuts



Source: Consumer insights research commissioned by Australian Macadamias and carried out by independent research agency Focus Insights in October 2024.

Section 4: Marketing Highlights





The Australian Macadamias marketing program maintained strong momentum in 2025, delivering a diverse mix of creative, insight-driven activity designed to build awareness and trial among consumers and spark ingredient innovation within the food and beverage sector.

Targeting trade and consumer audiences across Australia, China, India, Japan, South Korea and Taiwan, the program continues to be shaped by local insights and delivered by in-market teams who understand how to connect the brand's story with regional trends and opportunities. Each initiative demonstrates the versatility and appeal of Australian macadamias from everyday enjoyment in home cooking and snacks to their use as a premium ingredient in new product development.

The following pages showcase some of the year's key achievements across these markets.



Australia

Short video content for bite-sized storytelling

A new suite of short video content was rolled out across domestic social media channels this year, designed to communicate key macadamia benefits quickly and clearly. From snacking to gifting, these fast, focused clips proved an effective way to cut through and connect with time-poor audiences. They're also widely used across our export markets.



New recipes keep inspiration fresh

Continued investment in recipe development helped strengthen the taste, texture and versatility story. A stream of new ideas joined the collection, offering consumers fresh inspiration for snacking, easy everyday meals and standout special-occasion dishes.

Competitions continue to perform

Competitions remain an effective way to drive engagement and build our email list. This year's summer competition drew more than 8,000 entries and the winter competition almost 6800 entries, growing the domestic database to over 35,000.

Domestic database
grew to over
35,000

Enjoy the last
of summer
with Australian
Macadamias

giveaway!

30 prize
packs to
be won.

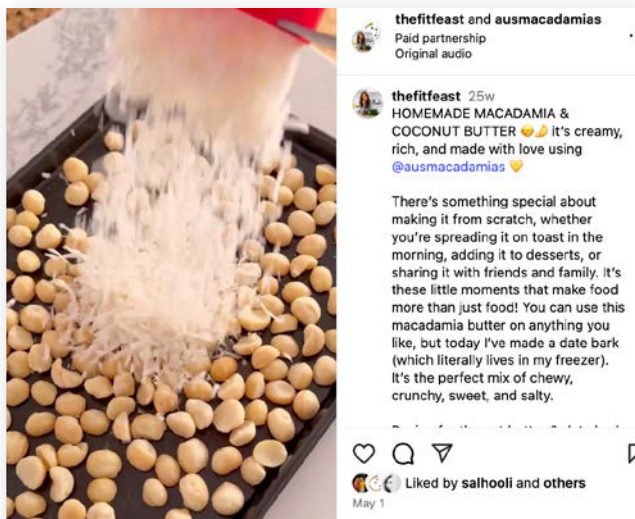
AUSTRALIAN MACADAMIAS



Enter for
your chance
to WIN

Grower stories strike a chord

Grower profiles continue to perform strongly across domestic digital channels. This year, six new stories featuring growers from the Bundaberg region were developed, showcasing the people, passion and expertise behind our premium product. Their popularity highlights the strong consumer appetite for authentic, human stories about the food they enjoy.



Inspiring creations from Australian food influencers

Collaborations with leading Australian food and lifestyle creators continued to showcase macadamias through approachable, creative recipes such as macadamia and coconut butter, macadamia ANZAC biscuits and blueberry and macadamia smoothie bowls. Campaigns featuring @littlekalegirl, @madebymandy and @thefitfeast helped Australian Macadamias reach new and substantial audiences on Instagram, positioning the nut as wholesome, versatile and indulgent. Pairing creativity with authenticity, these collaborations are keeping macadamias part of everyday food conversations.



Gelato World Cup China Selection

Macadamias were a medal-winning ingredient at the Gelato World Cup China Selection, held at SIGEP China 2025 in Shenzhen. As a silver sponsor, Australian Macadamias was proud to support the event and see our native nut featured in both the gold and silver medal-winning creations. Embraced for their creamy flavour, soft crunch and golden hue when roasted, Australian macadamias added premium appeal to some of China's most exciting new gelato concepts.



Perspectives from China's food industry leaders

To deepen the connection with the Chinese trade audience, a six-month interview series was conducted with some of the country's most respected chefs, brand managers and food media professionals. These interviews explored their views on Australian macadamias, from their rich flavour and texture to their potential in elevating both traditional dishes and innovative food products. The conversations also touched on broader food and health trends, offering valuable insights into the evolving Chinese culinary landscape. Published on the Australian Macadamias trade WeChat channel, the series helped reinforce macadamias' relevance and value to China's foodservice and manufacturing sectors.



Influencer collaborations amplify health and lifestyle messaging

Targeted collaborations with influencers at key times throughout the year highlighted the health benefits and sensory appeal of macadamias. The selected influencers authentically positioned macadamias as a source of energy and delight in everyday moments. These posts not only drove high engagement across Chinese social media platforms Weibo, WeChat and RED, but also successfully reinforced the role of Australian macadamias in enriching vibrant, health-conscious lifestyles among Chinese consumers.



Australian Macadamia Festival expands to Bangalore

Now in its third year, the Australian Macadamia Festival continues to grow with support from Austrade. Following successful events in Mumbai and Delhi, the 2025 festival took place in Bangalore, bringing together chefs, restaurants and patisseries for a week of activity that showcased the versatility and premium quality of Australian macadamias. 20 of the city's leading restaurants, cafés, patisseries and bars featured special macadamia menus, creative dishes and interactive workshops, while a dedicated trade forum attracted more than 100 senior food-industry leaders.



Paul and Mike collaboration showcases macadamias' premium appeal

Acclaimed Indian farm-to-bar chocolate maker Paul and Mike showcased Australian macadamias in a new limited-edition range that celebrates their rich flavour and buttery texture. Featured products included Fine Milk Chocolate with Australian Macadamias and Cranberry, Coffee and Australian Macadamia Cobbles, and a Macadamia and Chocolate Spread made with cocoa beans, brown sugar and golden acacia honey. The collaboration highlights how macadamias' distinctive crunch and creamy taste enhance indulgent chocolate creations while reinforcing their status as a premium ingredient in India's growing artisanal confectionery scene.



Inspiring new ways to cook with macadamias

Partnerships with top Indian Instagram creators Karan Sawhney, Culinary Chaser and Savoury Tales highlighted how macadamias can feature in both traditional Indian and global recipes. From macadamia and pea vegan risotto to macadamia rabri (a traditional Indian dessert), the content reached millions of food lovers and drove strong engagement.



Japan



Collaborative giveaways engage and educate consumers

Social media giveaways with iconic chocolate brand Meiji celebrated macadamias in a culturally relevant way in 2025, starting with a New Year campaign inviting followers to vote for their favourite new year macadamia dish. This activity shared inspiring usage ideas while offering consumers the chance to win a Meiji prize. Later in the year a spring promotion celebrating cherry blossom season encouraged users to guess the colour of macadamia flowers - a playful way to spark curiosity and share more about their natural origins. Both activities achieved strong engagement while reinforcing the connection between Meiji's beloved chocolate and Australian macadamias.

A collaboration with Australian brand Brookfarm showcased the natural pairing of macadamias and muesli, positioning macadamias as a wholesome, premium ingredient. The promotion also provided a platform to highlight Brookfarm's rainforest regeneration efforts, providing a tangible example of how Australian macadamia growers protect the natural environment on which they farm.





South Korea



Successful brand partnership drives product development

An exciting development in the collaboration with popular South Korean dessert brand Kokorokara saw new Australian macadamia products launch across CU, South Korea's largest convenience store chain with a network of 19,000 stores. The partnership began in September 2024 with limited-edition macadamia desserts created by Kokorokara that were extended due to strong consumer demand. One of these - the Macadamia Brittle Pudding - was released through CU this year as a limited-edition product and remained on shelves for around four months due to its success and popularity. CU has since expanded its lineup beyond the Kokorokara collaboration, introducing additional macadamia products such as the Macadamia Chocolate Cookie, Macadamia Matcha Cookie and Macadamia Brittle Ice Cream Bar, all highlighting the Australian origin of the macadamias.



Influencers bring macadamias into Korean kitchens

Monthly collaborations with South Korean food and lifestyle creators helped introduce macadamias to new audiences and highlight their health, versatility and sustainability credentials. The most successful posts featured simple, visually striking recipes that were easy to recreate at home, amplified through creators with large and loyal followings. By combining creativity with authenticity, these collaborations positioned macadamias as both a premium and approachable ingredient, reinforcing their appeal in everyday Korean cooking.



Giveaways tie macadamias to moments of celebration

Two seasonal campaigns in Taiwan helped deepen consumer awareness of macadamias while tapping into cultural celebrations. A Lunar New Year giveaway invited followers to tag friends and answer “Where are macadamias grown?” - a fun and engaging way to reinforce their Australian origin. Later in the year, a 520 Day campaign connected macadamias’ heart health benefits with the social media celebration of love, encouraging followers to share the benefits of eating macadamias for a chance to win prizes. Both activities achieved strong engagement and substantial reach, ranking among the top-performing posts of the year.



Trade engagement through Taste of Queensland Showcase

Australian Macadamias also participated in the Taste of Queensland Showcase in Taipei, hosted by Austrade and Trade and Investment Queensland. The event provided opportunities to meet key importers and highlight Australian macadamia products alongside other premium Queensland exports. Guests enjoyed macadamia-inspired desserts such as Orange Australian Macadamia Cheesecake, Cocoa Puff with Australian Macadamias and Pistachio Cake with Australian Macadamia Nuts, reinforcing their versatility and appeal in high-end culinary applications.

Influencers spark curiosity and conversation

Collaborations with popular Taiwanese influencers proved highly effective in showcasing macadamias to new audiences. Using humorous, relatable video content, creators highlighted everyday eating occasions and sparked strong sharing and interaction among food enthusiasts. The top-performing posts achieved substantial reach and helped position macadamias as a wholesome, premium ingredient aligned with modern lifestyles.

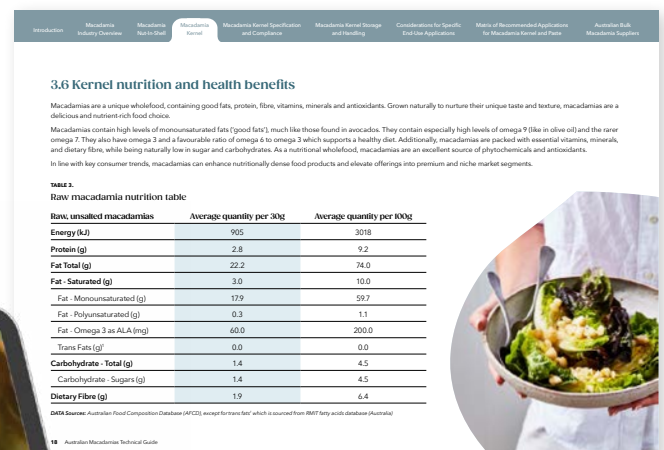


Technical resources helping drive global ingredient innovation

2025 saw the launch of a suite of landmark resources created specifically for food industry professionals, marking the next step in Australian Macadamias' long-term commitment to supporting innovation and growing demand for macadamias as a food ingredient.

Australian Macadamias Technical Guide

The Australian Macadamias Technical Guide is a comprehensive resource designed to help food industry professionals understand the features, benefits and technical attributes of macadamias as an ingredient. Bringing together the latest technical knowledge and best-practice insights, the guide supports product developers in unlocking macadamias' full potential across a wide range of food applications.

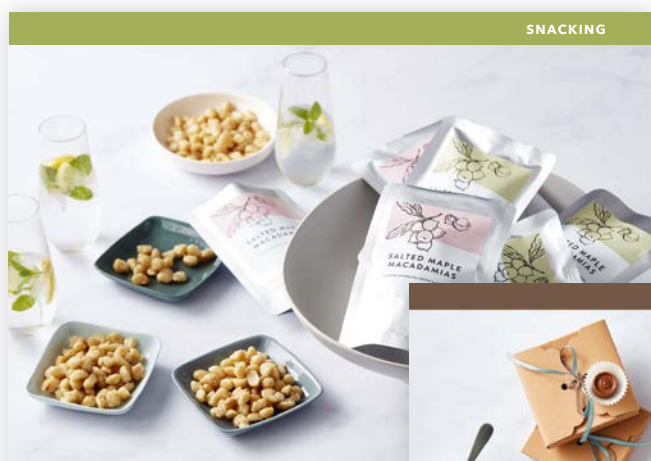


Application Solutions Guides

The Application Solutions Guides offer practical, ready-to-use macadamia product formulations that help brands, manufacturers and product developers bring new ideas to market faster and with greater confidence.

The suite includes 13 commercially viable macadamia product concepts spanning five key categories: bakery, snacking, nut pastes, praline fillings and dips. Each guide features a fully tested base formulation, processing flowcharts, manufacturing considerations, and recommendations for macadamia format, dosage and treatment – along with flavour variations and concept ideas to inspire further innovation.

All resources were developed in partnership with the Food Innovation team at the Queensland Department of Primary Industries and are available in English, Simplified Chinese, Traditional Chinese, Japanese and Korean. A targeted LinkedIn campaign supported their launch, driving awareness and downloads among food innovation, product development and procurement specialists.



SNACKING

Wet Coated Macadamias



Concept
Macadamias with
wet flavour coating



Steam cook suitability
No



Processing method
Roast and coat



Nut raw/roasted
Raw



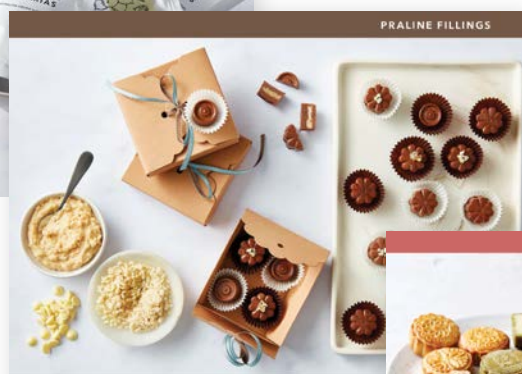
Shelf life
Long



Nut recommended
usage rate (%)
70-80%

AUSTRALIAN MACADAMIAS

The Technical Guide and Applications Solutions Guides are available via the Technical Resources section of the trade website: trade.australian-macadamias.org/technical-resources/



PRALINE FILLINGS

Macadamia Praline Chocolates



Concept
Macadamia praline
filling for chocolate



Processing method
Shear or mill



Thermal treatment suitability
Yes



Nut raw/roasted
Roasted



Shelf life
Long



Nut recommended usage
35%-40% paste with 35%
style 7 kernel in the praline

AUSTRALIAN MACADAMIAS



BAKERY

Macadamia Mooncakes

Macadamia
kernel style
6:7
part



Concept
Mooncake



Steam cook suitability
Yes



Processing method
Bake



Nut raw/roasted
Raw or roasted



Shelf life
Short, medium, long



Nut recommended
usage rate (%)
15%-35% kernel
5%-10% oil

AUSTRALIAN MACADAMIAS

**Keep up to date with our latest news by
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Trade.Australian-Macadamias.org/newsletter

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