

International Macadamia Symposium 2023



IMS'23

MOVING FORWARD TOGETHER

South African Macadamias NPC  
(SAMAC)

Outlines of Macadamia Industry  
Development in China

Session 2 The Global Industry

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# I. General Conditions in China

## 中国产业概况

# General Growing Conditions 种植概况



## Distribution 分布

**5 Provinces** with macadamia planting by totally covering

area of **309,000 Hectares**. 5个主要省区，种植面积达30.90万公顷

## Major Growing Province 主要种植省区

**Yunnan province** is the largest macadamia planting area with area of **253,000 Hectares**. 云南是最大的种植省，面积达到25.30万公顷。

## Other Majors 其他种植区

Besides Yunnan and Guangxi, other provinces in China like Guizhou, Guangdong and Sichuan are also actively developing Macadamia industry. 除云南、广西外，贵州、四川、广东也有夏果种植。

# Growing & Yield Details in Yunnan 云南概况

Major Cities 主要州市	Area (Ha) 种植面积 (公顷)	Estimated Yield of 2023 (ton) 2023年预估产量 (吨)
Lincang 临沧	176,667	27,195
Pu'er 普洱	29,333	5,513
Dehong 德宏	25,000	28,075
XishuanbanNa 西双版纳	10,000	7,400
Baoshan 保山	10,000	2,220
Honghe 红河	1,333	37
Wenshan 文山	400	22.2
Nujiang 怒江	333	11.1
In Total 合计	253,067	70,473

In July, the Survey team organised by YMAC to implement the production site survey all around Yunnan Province on each major growing city. The total production volume in Yunnan is expected around **70,473 MT at M.C of 10%. However I need to point out this figure is estimation because we are still within the harvest season. The final accurate quantity could be released at the end of the season.**

2023年7月，云澳达公司组织调查组，针对云南各主产州市今年的产情进行了现场走访、摸底。预计10%水份的亮果原料会超过7万吨。因为目前仍在省内的收获季中，所以最终的产量将在产季结束后做详细统计。

Source:来源

Datum Collected by International Macadamia Science Research & Development Committee 国际澳洲坚果研究与发展促进会

Yunnan Macadamia Industry Development Co.,Ltd 云南云澳达坚果开发有限公司

Yunnan Macadamia Society 云南坚果行业协会



# Growing & Yield Details in China 中国概况

Major Provinces 主要省区	Area (Hec) 种植面积 (公顷)	Yield of 2022 (ton) 2022年产量 (吨)	Estimated Yield of 2023 (ton) 2023年预估产量 (吨)
Yunnan 云南	253,067	32,080	70,473
Guangxi 广西	46,667	8,765	12,840
Guangdong 广东	10,000	1,500	2,140
In Total合计	309,734	42,345	85,453

The output of macadamia NIS @ MC of 10% in China **in 2022 achieved 42,000 tons and more than 85,000 tons in 2023 with MC of 10%**. In the next coming five years, the output will be increasing gradually. **The figure is also the estimation, and the actual quantity would be released at the end of the crop season.**

2022年中国的产量以10%水份计超过4.2万吨。2023年全中国的产量将**超过8.5万吨（10%水份计）**。未来五年，中国的产量将会逐年上升。中国的产量数据也是预测值，实际产量将在产季结束后汇总统计公布。

Source:来源

Datum Collected by International Macadamia Science Research & Development Committee 国际澳洲坚果研究与发展促进会

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# Processing & Production 生产加工



Along with the growth of kernel consumption in China, more and more state of art equipments are used by Chinese processors.

为应对中国市场果仁消费上升的需求，越来越多的加工商采用先进的机械进行生产。

X-ray Machine for sorting the defects; advanced crackers for higher wholes rate as well as the A.I.color sorter for grading the kernels after cracking to increase the sorting efficiency.

比如：采用X光机剔除缺陷原料；新一代的破壳机提高整仁率；以及智能色选机提高果仁的分选效率。





## II. Consumption Market in China

## 中国消费市场





# General Nuts Consumption 坚果消费概况



The size of the leisure food market has exceeded **1 trillion yuan**.

中国的休闲食品消费市场达到**10,000亿元**。

The market size of tree nuts is close to **50 billion yuan**.

坚果消费市场达到**500亿元**。

According to the "Chinese Residents' Balanced Diet Pagoda (2022)", the intake of soybeans and nuts per person should be **25-35g/day**, so there is still **significant room for improvement**.

《中国居民膳食宝塔2022年》报告指出，中国人每天的大豆坚果摄入量只有**25—35克**，相较欧美等国家仍有**很大的提升空间**。

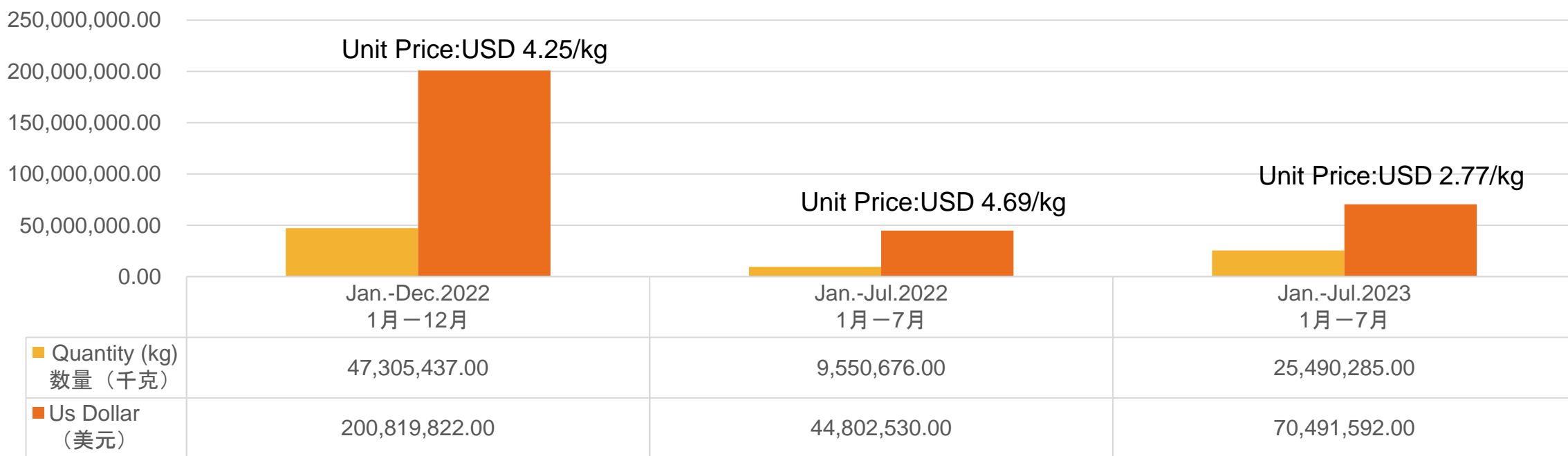
**Lower average per capita daily consumption of macadamia in China makes huge potential in the future !**

较低的夏果人均消费量，造就中国未来巨大的消费潜力！

# Growth of Macadamia NIS Import in China 中国夏果壳果进口增长

Comparison of Macadamia Nut in shell imported to China Jan-Jul 2022 & 2023

2022年与2023年1-7月中国夏果壳果进口对比



As per the Customs statistics, **Macadamia NIS is still the major raw material imported to China** with totally **47,305.437MT** imported to China in 2022! The import quantity from Jan to July this year were higher than same period in 2022, however, the unit price was lower more.

根据海关统计，2022年**进口到中国的夏威夷果仍以壳果原料为主**，达**47,305.43吨**。2023年1月至7月进口量虽然比2022年同期上升，但单价却大幅下跌！

# Growth of Macadamia Kernels Import in China 中国夏果仁进口增长



Prompted awareness of **macadamia kernels**, more quantities of kernels imported abroad was achieved with **totally 5,077.567MT** imported to China in 2022! And the quantity imported from Jan to July in 2023 were also higher than same period in 2022. However, the unit price was still decreased a bit.

随着消费者对果仁的认知逐步加升，2022年进口到中国的夏威夷果果仁达**5,077.56吨**。我们可以看到2023年1-7月的果仁进口量相较2022年同期有所上升，但单价仍然出现了下跌。

# Growth of Macadamia Consumption Volume 夏果消费量的增长

Summary of Macadamia Consumption per capita and Total volume in Major Countries (Regions) in 2014  
2014年主要国家(地区)坚果人均消费/消费总量统计

No. 序号	Country/Region 国家/地区	Per Capita(g) 人均消费量(克)	Volume (Kg) 消费总量(千克)
1	Australia 澳大利亚	137.1	3,141,000
2	United States 美国	36.2	11,420,118
3	Taiwan, China 中国台湾	25.4	590,351
4	Germany 德国	21.8	1,784,100
5	Japan 日本	20.3	2,572,445
6	Mainland China 中国大陆	1.3	1,790,349

Source: Australian Macadmaia Society  
数据来源: 澳大利亚澳洲坚果协会

There were 95,990 MT macadamia consumed in China in 2022 as per the Customs statistics.

海关统计22年中国夏果消费量为95,990吨。

There were 1.4 billion population in China in 2022.

2022年中国人口14亿。

So, the consumption volume per capita in China in 2022 was raised to 67.98g which is 52 times than that in 2014.

2022年人均夏果消费量为67.98克, 较2014年增长了52倍。

# Variation of Consumption Style in China 中国消费方式变迁



Traditional Online Marketing Channels in China

中国零食市场的传统线上渠道

New Media Channels Outbreak

新媒体渠道爆发



New Channels in China leading More Sales

渠道增加, 销量上涨

Shopping on E-Commerce transferred from traditional Channels to New Media Sections  
Covering 1.1 billion population in China

中国11亿人口线上消费从传统电商向新媒体兴趣、内容电商迭代!

# Variation of Macadamia Consumption Scene 夏果消费场景的演变



Family party

家庭聚会



Body fitness

健身



Health diet

健康代餐



Baby Nutrition

母婴营养



Leisure time

休闲时光



Coffee mate

咖啡伴侣

Various Consumption scenes changed from the pure consumption snacks!

简单的零食消费演变到多场景消费！

# Our Efforts 我们的努力



Nan san Factory of YMAC



As the pioneer of Macadamia industry in China, Yunnan Macadmaia Industry Develoment Company grabs the chance based on our growing advantage for more than two decades as well as the huge Chinese population.

作为中国夏果产业的开创者，云澳达公司依托20年的种植优势以及中国的广阔市场，紧跟市场和消费的变革。

Along with the kernel consumption increased since 2020 in China, YMAC developed new types of products to meet the consumers well.

2020年果仁消费开始提速，云澳达公司开发了多款符合市场需求的新产品。



# Poverty Alleviation Industry in Yunnan 云南的扶贫产业

In Yunnan, **macadamia industry is not only the commercial field but also poverty alleviation project in Yunnan.** YMAC introduced macadamia to the local farmers decades ago achieving poverty reduction by growing macadamia. In addition, the technical trainings are organized by YMAC to help the farmers increase production annually.

夏果产业在**云南不单涉及经济领域，还是一项重要的脱贫产业。**云澳达公司数年前将夏果引进到云南，引导当地农户种植，实现了脱贫致富。此外，云澳达公司每年还组织开展种植技术培训，帮助农户提高产量。



**On site trainings for local farmers annually**

每年为当地农户举办技术培训



# Our Jobs at Business clients side 我们在B端的工作

## To Business Clients 针对B端市场

- Based on our own farms and processing factories, establishment good relationship with domestic clients and Cooperation with major business clients all over China by providing premier quality raw materials for many years.
- 扎根自有农场和加工厂，与国内客户建立良好关系，与头部商家合作多年，提供优质原料。



# Our Jobs at Consumer side 我们在消费端的工作

## To Consumer Side 面对C端市场

- Cooperation with several top sales influencers & companies due to premier quality & reasonable price
- 物美价优，与国内多家头部线上主播合作推广。
- 185g Natural flavor Kernel Achieved NO.1 at TIKTOK E-commerce of Most Welcome NUTS SALES LIST
- 185克自然味果仁获得抖音“坚果炒货爆款榜”第一名。



In order to cope with the market variation, YMAC and YMS are always on the way to change for the premier macadamia.

为提供优质夏果以应对市场的变革，云澳达公司与云南坚果行业协会一直在迭代！

# Our Products 我们的产品



185g Wholes



20g flavored Harvles



Packed kernel Gift

**Developing new kernel products by both wholes & halves for various consumers !**

针对不同消费者的需求，开发新款半仁、整仁产品！

# Donation & Public Welfare in China 国内捐赠和公益事业

In addition, YMAC also takes any chances to join the donation and public welfare activities to help the people locally. Macadamia makes people in China not only economic rich but also spirit rich.

此外，云澳达公司还利用各种机会，参会国内的各种捐赠和公益活动，让当地居民从夏果中获得实实在在的益处。夏果在中国不只让人民经济富裕，也使用人们在精神上富足起来。



# III. Opportunities & Challenges

## 机遇与挑战



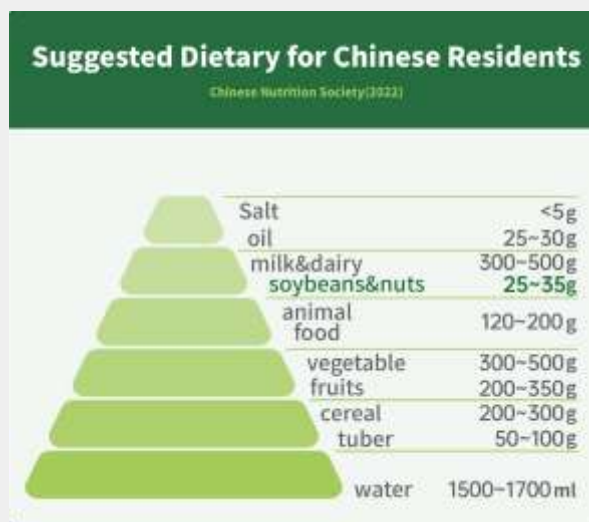
# Opportunities in China 中国的机遇



Based on the GACC statistics, **more quantities of macadamia** are imported abroad from major growing countries including RSA, Australia, Kenya, Guatemala etc.

根据海关数据统计，中国从南非、澳大利亚、肯尼亚、危地马拉等主产国的坚果进口量在逐年上升。

Recommended Nutrient Intake Of Nuts	
Dietary Guidelines for Chinese Residents (2022)	
50-70g/ week	Adults
10g/day	Pregnant and nursing mothers
50g/week	aged 6-10
50-70g/week	aged 11-17
20-30g/day	vagan
15-25g/day	lacto-ovo



*The White Paper on Nutrition and Market Development of Chinese Nuts* proposes the upgrading of the nut industry towards **quality& health**.

《中国居民平衡膳食宝塔（2022）》指出，中国的坚果消费正向着“品质”和“健康”方向升级。

Kernel consumption responds this trend which means much more values of macadamia to be created.

果仁的消费正好呼应这个趋势，同时也意味着坚果将产生更大的价值。



# Challenges in China 中国的挑战

From the point on above, it shows Chinese consumers will care about the **Quality** more than before so how to make the **Quality & Cost balanced** become most important among suppliers and processors.

从上述中国市场的机遇看出，中国消费者比以往任何时候都关心产品的**品质**。所以，供应商、加工商需要更多的考虑**品质与价格的平衡**。



**Balance of premier quality and good price of macadamia should be most important in the future in Chinese market!**

未来的中国市场将是注重高品质、友好价格的性价比市场！



# IV. Future Perspective 未来展望





# Perspective in future 展望未来

Let us work together 让我们共同努力！



Macadmaia is our common cause. We share the same opinion, same value, and same target under macadamia. We can not stop exploring the new field then we could achieve the success.

澳洲坚果是我们共同的事业。在此之下，我们有共同的理念，共同的的价值观以及共同的发展目标。我们需要不断探索，方能取得成功。



# Perspective in future 展望未来

Let us move forward together 让我们携手共进！



We develop macadamia industry not only meeting the differential demands but also cooperating with partners of home & abroad to overcome the barriers and boost the development of global industry.

夏果产业发展不但为了满足人们的各种需求，还要与国际同行共同携手合作克服遇到的各种困难，使全球的夏果产业蓬勃发展！

**We are Macadamia Family !**

