

International Macadamia Symposium 2023



MOVING FORWARD TOGETHER

Macadamias South Africa (NPC)
(SAMAC)



Guatemala Update



Guatemala Macadamia Industry

Macadamia industry was established over 60 years ago by a group of Hawaiians and local farmers

Many growers are originally coffee growers looking to diversify the volatility from the futures market by having an alternative crop

Rich volcanic soils with various microclimates permit the cultivation of macadamias throughout the year



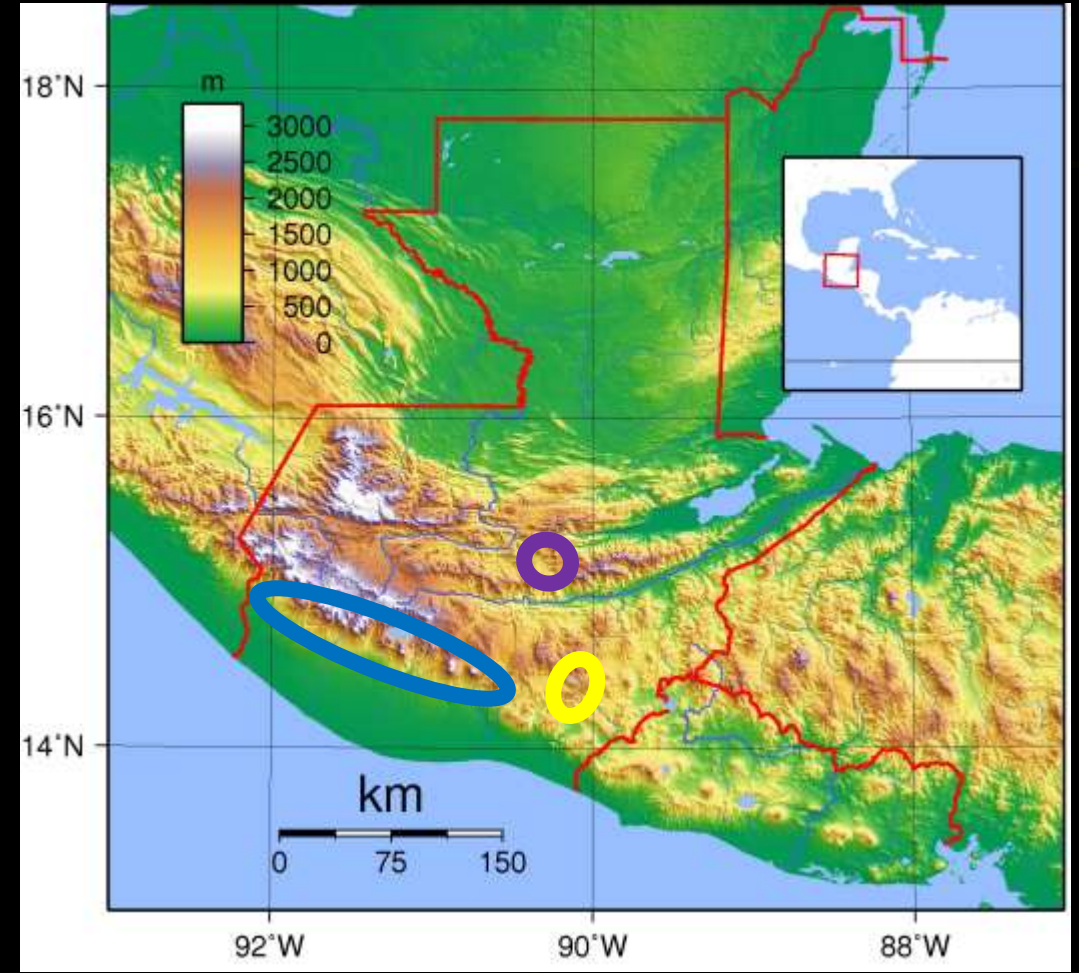
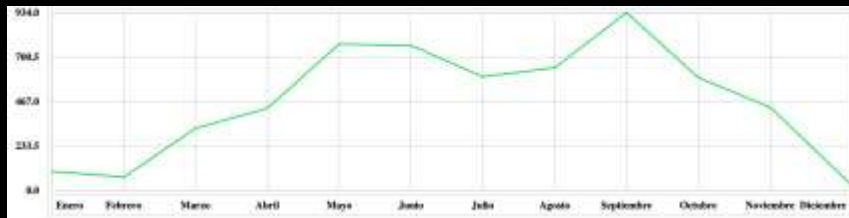
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Where are the macs grown?

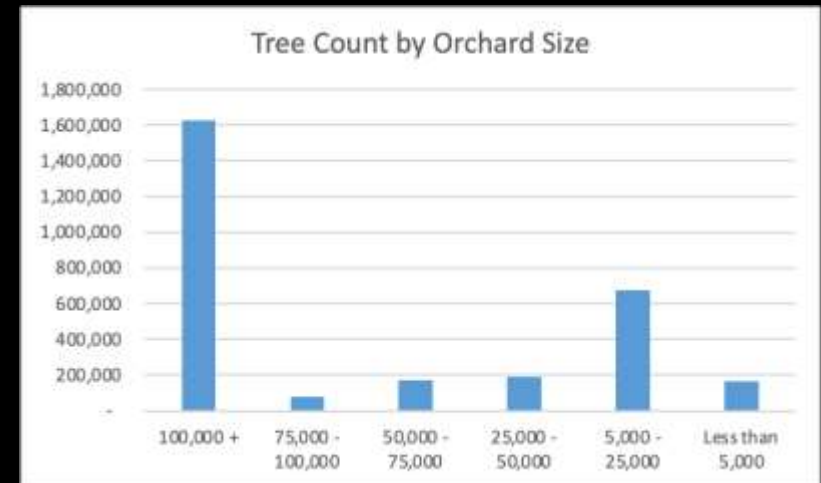
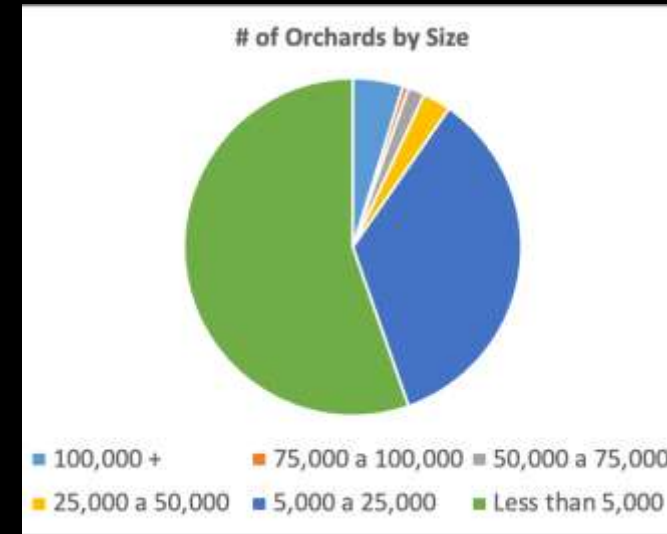
- Orchards can be found anywhere between 600-1,600 mts elevation, elevation required to get the appropriate cold temp to promote flowerings
- Usually interplanted with coffee and in some cases bananas/plantains
- Guatemala is rich in volcanic soils with plenty of organic material that are well draining.
- Rainfall varies by region, some dryer areas receive only 1,200 mm, however, the bulk of the macadamias are planted in regions with annual rainfall up to 6,000 mm



23

Grower Distribution in Guatemala

- 186 total growers identified
- Estimated 18,118 hectares planted with macadamias (2,900,000 trees)
- About 45% of planted area is in “production age”, the rest will come into production in the coming years
- Recently established Grower Association, with 53 growers participating, promote best practices for both farming and post harvest handling of macadamias
- 3 processors/exporters, and some farmers exporting throughout the year directly NIS

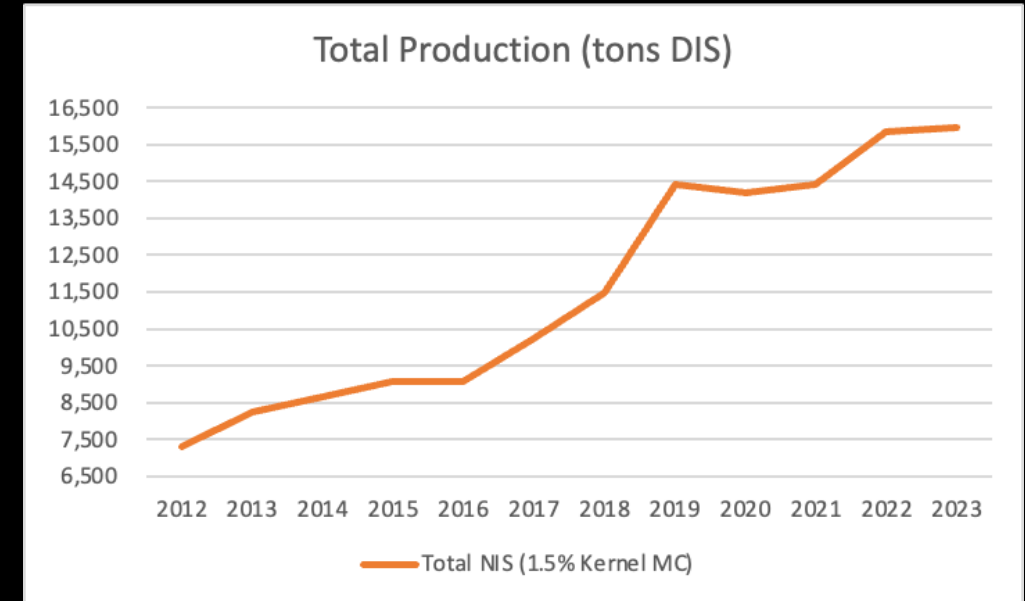
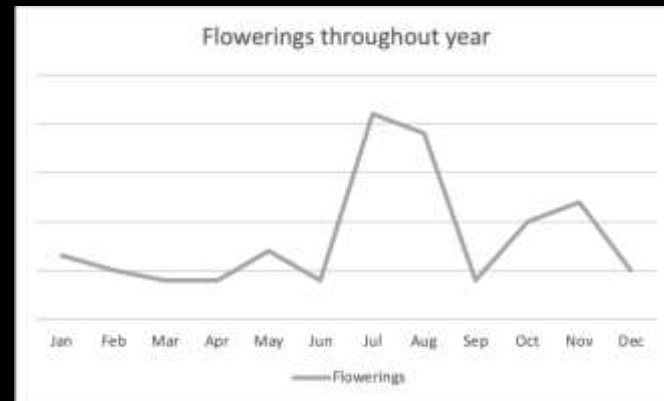
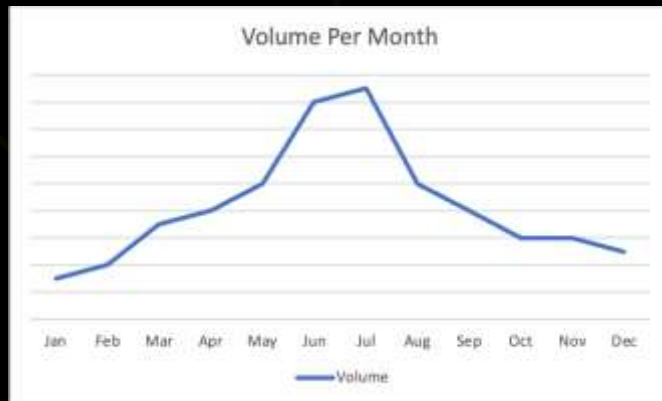


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Macadamia Crop Behavior

Harvest & Mac Behavior

- Year round harvest
- Fluctuated recently due to higher temperatures especially at lower elevation orchards
- Flowering throughout the year
- Strong plantings took place between 2015-2020
- Very little if any new plantings today



- Average 8% growth



23



Current Farming challenges

- Labor shortages (migration to US)
- Topography
- Nut Borer
- Quick tree decline
- Tree replanting 0.5-1.5% per year
- Post harvest handling



Farming macadamias

What could impact Guatemalan growers the most?

Hand Harvest Costs

- \$0.25-0.50/kg WIS
- Impacted by in-husk to in-shell yield as well as time of year and availability of labor
- Migration to the US continues
- Remittances to family members (\$1.5+ billion per month)

Weather

- Extremes (temperature and/or rainfall), currently El Nino, affecting stress on trees and flowerings due to higher temperatures
- Devastating Winds



Future for macs in Guatemala

- With the current area and trees planted, Guatemala is producing an average of 0.87 ton per hectare (2.0 ton per "producing" hectare)
- This value will increase and if all things remain as it is today, current mature plantations are averaging 2.5-5.0 ton per hectare per year NIS.
- A good first goal would be to get the country producing 3.0 tons per hectare (based on varied farming practices and intensities)
- A lot of the future volume from Guatemala, especially from the smaller growers, will depend on pricing and how quickly it will recover.



23



QUESTIONS ?