



Strategic Blueprint 2030



The Mission

Why ANIC was formed and exists today: its 'raison d'être'

NUT INDUSTRY CORE PURPOSE

Delivering superior Australian nuts and nut products.

- superior** As a niche-scale industry by global standards, we compete by consistently growing and delivering world-leading products.
- Australian** We export a significant portion of our production to the world and we enable Australians to buy world-standard local products.
- nuts** Almonds, chestnuts, hazelnuts, macadamias, pecans, pistachios and walnuts are the seven varieties of tree nuts grown at commercial scale in Australia.
- nut products** In addition to shipping fresh nuts, we add value by processing nuts into more usable and less perishable products that best fit customers' needs and lifestyles.

ANIC CORE PURPOSE

To unify, strengthen, support and represent the production, marketing and consumption of nuts within Australia and internationally.

- Unify** Operating as a Federation formed by and representing the seven tree nut Industries, through their industry representative bodies. Coordinating information and facilitating collective action with mutual benefit that maximises returns to growers.
- strengthen** Building cooperation for sharing resources, experience and ideas. Building capability, improving productivity and sustaining the profits necessary to strengthen the industry and reinvest in its ongoing development.
- support** Proactively representing the Industries through professional advocacy plus facilitating collective action in farm research and marketing, with mutual benefit that maximises returns to growers.
- Specific areas of support include:
- To represent the nut industry to Australian and international governments when appropriate for each nut industry
- production**
- Constantly improving the understanding and practice of growing high quality nuts in Australian conditions, developing both on-farm and distribution channel processes.
- marketing**
- Promoting the superior quality and value of Australian-grown nuts.
- consumption**
- Supporting Australians' awareness of the health benefits of regular nut consumption.
- nuts** Serving Australia's seven commercial tree nut industries: almonds, macadamias, walnuts, pecans, pistachios, chestnuts and hazelnuts.
- Australia** Building cooperation and competitiveness locally viz-a-viz other food products.
- internationally** Building global competitiveness

TOTAL STRATEGIC SITUATION

A snapshot of ANIC's current condition and key external forces.

Historical View and Projections for Planting, Production, Value and Exporting of Australian Nuts

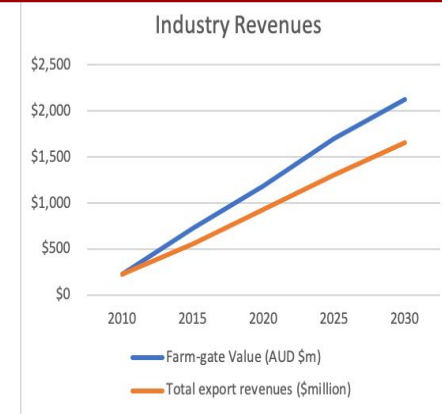
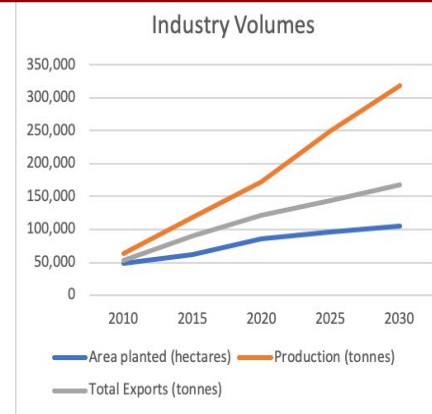
Exporting of Australian Nuts

	2010	2015	2020 f	2025 f	2030 p
Area planted (hectares)	48,837h	61,723h	85,546h	96,540h	105,402h
Production (tonnes)	63,578t	118,488t	172,948t	249,614t	318,552t
Farm-gate Value (A\$m)	\$230m	\$ 726m	\$1,190m	\$1,698m	\$2,124m
Total Exports (tonnes)	53391 t	90897t	121663t	144299t	167430
Total export revenues (A\$m)	\$232 m	\$ 556m	\$ 937m	\$1309m	\$1657m

Note:

f. 2021 and 2025 forecasts prepared by ANIC and its member Associations, based on growers' reports..

P. 2030 projections are a linear extrapolation of projected trends, which assumes sustaining the same rate of growth, maintaining farm productivity and the same farm-gate pricing.



Australian Nut Industry

In the future, it is anticipated that:

Opportunities Increasing Australian orientation towards plant-based eating. 'Nuts for Life' will increase awareness of nuts' health benefits.

Global demand growth at 4%pa: particularly in India, China, Eastern Europe and the Middle East

Risks Competing demands for and increasing costs of water. Inconsistent value for R&D funding. Diminishing social license due to growing water & chemical usage.

Increasing foreign production and Australian imports. Exotic pests and diseases will enter Australia.

While within the Industry today:

Constraints Development activities are primarily technical. Nuts for Life message has yet to achieve per person consumption targets.

Relatively high production input costs.

Advantages Counter seasonal production High quality fresh and processed products. Nut health benefits are well known. Higher farming yields than other countries.

Highly mechanised production processes. World class horticultural skills in farming R&D.

ANIC

In the future, it is anticipated that:

Opportunities The industry has forecast continuing growth, which would support increased ANIC resourcing and thus greater technical and service professionalism.

Risks Competing interests of member industries may undermine ANIC cohesion.

While within ANIC today:

Constraints Limited collaboration between member industries. ANIC operates at arms length from the member industries. Lack of deep industry experience in staff..

Advantages High quality agri-political support for the Sector and for growers across each industry.

VISION 2030

Where ANIC will be, and how ANIC will operate in 2030

Nut Industry Vision 2030

Australia's leading agricultural industry, delivering an outstanding consumer experience, with exceptional productivity, profitability and ROI

Australian Nut Industry Strategic Blueprint

<p>^ Financial Performance</p>	<p>Export Revenues: \$1.6bn pa. LVP: \$8bn Industry revenue: \$2.1bn; Top-quartile Agriculture sector ROE.</p>
<p>^ Customers & Consumers</p>	<p>Australian consumers embrace nut health benefits and consume their 30g daily. International purchasers value Australia's consistently superior fresh and processed products.</p>
<p>^ Industry Systems & Structures</p>	<p>Strong export performer Effective systems and structures supporting trade and market access Globally superior product quality and leading farming and processing efficiency Socially responsible and environmentally sustainable systems. Continuous learning and improvement are apparent across the industry. Professional RD&E maintains strategic advantage.</p>
<p>^ People & Culture</p>	<p>High level skills supporting trade and market access Members collaborate to achieve mutually beneficial development and growth. Across the Industry, people are proactive and creative, with an inter-dependent and pluralistic mindset.</p>
<p>^ Leadership & Governance</p>	<p>Across all seven industries, dynamic leadership constantly promotes, guides and supports development. Timely renewal of each of the Industry Boards. A 'pipeline' of leaders in each Industry.</p>

ANIC Vision 2030

A responsive service enabling the nut industry to collaborate in progressive and innovative R&D in nut production and marketing.

ANIC Strategic Blueprint

<p>^ Financial Performance</p>	<p>ANIC earns modest surpluses, and maintains modest reserves.</p>
<p>^ Members</p>	<p>Members are noticeably advantaged by ANIC support and perceive significant value for money. Members interact regularly in sharing, problem-solving and co-learning.</p>
<p>^ Systems & Structures</p>	<p>Proactive, systematic advocacy maintains a positive profile. Proactive working committees guide and support targeted industry development.</p>
<p>^ People & Culture</p>	<p>ANIC displays a dynamic mindset, constantly pursuing learning, development and growth. ANIC maintains full capacity in professional advocacy, R&D, biosecurity and marketing support.</p>
<p>^ Leadership & Governance</p>	<p>ANIC is funded to provide superior quality services. Systemic and pluralistic approach to Industry governance. A 'pipeline' of Industry leaders, enables timely renewal of the ANIC Board.</p>

ANIC Business Model

Summarising key aspects of the ANIC Business Model

Key Partners

Nuts for Life Management Committee

APVMA

NFF / Horticulture Council

DFAT (Foreign Affairs & Trade)

DAWE (Dept. of Ag / Water / Environment)

Austrade

Hort Innovation

Key Activities

Advocating Nut Industry interests to politicians and bureaucrats.

Promoting the value and health benefits of nut consumption and maintaining *Nuts for Life*' legal framework.

Developing industry leadership.

Promoting and sustaining effective cross-industry communications.

Reporting Industry Reporting Industry scope and demographics.

Publishing the Nutgrower Journal.

Organising the International Nut Congress and the Australian Nut Conference.

Publishing statistics on nut production and sales.

Maintaining the ANIC Website.

Key Resources

Board Members

Nuts for Life Program Mgr

Executive Officer

ANIC Accounts Officer

Value Proposition

Unity and collective strength across the tree nut sector.

Valuable R&D, as required from time to time.

Effective market positioning and promotion of nuts and nut products.

Nut Industries' needs and interests understood by key Politicians and bureaucrats

Industries' needs are accommodated in trade negotiations.

Beneficiary Relationships

The National Australian Nut Conference provides a biennial event where Industry stakeholders can convene to discuss common whole-industry issues and keep up with commercial dynamics and best practices.

The Nut Grower Journal informs growers in all industries

Channels

Publications: Journal, Sector / Industry reports

Industry conferences.

ANIC website

ANIC Board meetings

Beneficiaries

Directly: the seven Australian Nut Industry sector bodies:

Almond Board of Australia

Chestnuts Australia Inc.

Hazelnut Growers of Australia Inc.

Australian Macadamias Society

Australian Pecan Association

Pistachio Growers Association Inc.

Australian Walnut Industry Association

(and only indirectly to their members)

Expenses

Operating an Executive Office Travel and accommodation

Publishing & Conferences Marketing

Revenues

Nut Grower Journal

Conference Fees

Grant applications

Member subscriptions

2030 STRATEGY MAP

*Summarising the key strategic initiatives
towards realising the ANIC Vision by about 2030*

ANIC Strategy Map

