

The European market potential for macadamia nuts

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In the long term, the European market for macadamia nuts is expected to show stable growth. This growth is likely to be driven by changes in the consumption patterns of European consumers, including the rising demand for healthier snacking options and vegetable sources of protein. Also, consumers are seeking new experiences in consumption, which macadamia nuts can offer. Germany, the Netherlands, Spain, France, the UK and Poland offer the best opportunities for developing country suppliers by volume.

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The popularity of nuts contributes to the increasing demand for macadamia nuts on the European market. Macadamia nuts are mainly consumed as salty snacks, but they are also increasingly being used as ingredients in different products. Particularly the use of macadamia nuts in ice cream toppings and in spreads/butters is growing.

Macadamia nuts are the fruit (edible seed) of the evergreen macadamia tree, which belongs to the genus *Macadamia* of the Proteaceae family. Only three of the species are of commercial importance, namely *Macadamia integrifolia*, *Macadamia ternifolia*, and *Macadamia tetraphylla*. Macadamias are native to Australia, but today, they are grown in many areas in the world. The macadamia largest producers nuts are Australia and South Africa (50% of total world production), followed by China, Kenya, USA (Hawaii), Guatemala, Vietnam, and Malawi.

Once planted, the macadamia trees need five years before being able to carry their first fruit – their maximum carrying capacity is reached after ten years. Macadamia trees require warm temperatures and good annual rainfall to yield a good crop. The biggest threats to annual production come from droughts and extreme temperatures during the flowering and early nut development phases.

The nuts themselves grow encased in a hard, woody shell, which is protected by a green-brown fibrous husk that splits open as the nut matures. Macadamia nuts are harvested mechanically or gathered from the ground in different periods throughout the entire year, depending on the country of origin. Because flowering occurs over several months, macadamia nuts mature and drop to the ground over an extended period, so they have to be harvested regularly. Due to long-term maturity, it is possible for flowering and harvesting to overlap. In the European winter months, they are harvested in Africa and Hawaii, while during the spring and summer months, harvesting occurs in Australia and Central and South America.

The kernels undergo a lengthy drying process over the course of several months. Dried shells are very hard and are typically removed with cracking machines that have steel rollers or rotating knives. Production of macadamia nut kernels typically includes the following steps:

- Dehusking (removing the outer husk right after harvesting, commonly on the farm with dehusking machines)
- Preparing the nuts for shelling (sorting and drying)
- Shelling (with specially constructed machines)
- Grading (hand sorting and machine sorting)
- Packing

The ratio of macadamia nut kernel vs in-shell nuts after processing depends on the weather condition and implemented production technology, but it is usually 0.25 to 0.33. Types of macadamia nuts and quality categories are described in more detail in the market entry part of this study.

While in Australia, the United States and Japan the product is frequently used as an ingredient, in Europe macadamia nuts are still mainly used as a snack product (usually roasted and salted). However, as the world supply is growing, the interest in various industries in Europe is increasing, with macadamia nuts increasingly being used for the production of butter, for chocolate coating and as an ingredient in the confectionery industry.

This study covers general information regarding the market of shelled macadamia nuts in Europe that is of interest to producers in developing countries. Macadamia nuts are traded under two different Harmonised System (HS) codes. The HS code for in-shell macadamia nuts is 080261, while the HS code for shelled macadamia nuts (kernels) is 080262. As the European import of in-shell macadamia nuts is insignificant, this study only uses the code for macadamia nut kernels for statistical analysis.

Europe is the second-largest importing region of macadamia nut kernels, after the United States. Europe accounts for around a 30% share of the total world's imports. On average, European imports of macadamia nuts increased in volume by 9% per year in between 2017-2021. Nearly 82% of all imports from outside Europe come from developing countries.

In the next five years, the European market for macadamia nuts is likely to increase with a compounded annual growth rate (CAGR) of **11.3%**. This rate is higher than that of most other nuts. The main reasons for the expected market growth are the attractive and unique taste of macadamia nuts as well as the health benefits they provide. Another driver for the growth is the increasing usage of macadamia nuts by the food processing industry in Europe. Cereal and protein bars, fruit and nut bars and ice cream toppings are the fastest-growing categories using macadamia nuts as an ingredient in Europe.

Regular changes in import volumes will continue to happen, but these are influenced by the harvested crop volumes and price situation, rather than changes in demand. Although the demand for macadamia nuts in the European market is stable, it is influenced by irregular price changes on the supply side. Macadamia nuts are considered luxury nuts, with the highest price of all commonly consumed nuts on the European market. A price increase can deter consumers from purchasing more macadamia nuts, as they are perceived as expensive (macadamias are, on average, 50% more expensive than cashews and 6 times more expensive than peanuts).

Between 2017 and 2021, European imports of macadamia nuts grew by on average 7% in value and 9% in volume every year, to a value of €156.7 million and a volume of 10.7 thousand tonnes in 2021. The greater growth in volume than value indicates a decrease in import prices over this period. Over the long term, macadamia nut prices are expected to decrease, as production is increasing at a higher rate than demand.

Intra-European trade was estimated at 3,273 tonnes in 2021. Internal European trade consists of simple re-exporting of imported raw macadamia nut kernels, but also includes added-value processing, such as roasting. The value of European imports from developing countries increased by €33.3 million over the past five years, from €55.1 million in 2017 to €88.4 million in 2021.

Note: The figure above represents apparent consumption (the difference between imports and exports). Exact data about consumption per country do not exist. A rough calculation is available from the [International Nuts](#)

and Dried Fruit Council (INC).

Between 2017 and 2021, the average annual growth rate of macadamia nut consumption in the top six European countries was 18% in volume and 20% in value. In 2021, the top six economies consumed 6.1 thousand tonnes of macadamia nuts, valued at €90.5 million. As macadamia nuts are not produced in Europe and re-export outside Europe is insignificant, total European consumption is almost the same as imports. Germany, Spain, the Netherlands, Poland, France and Italy are the largest markets. According to the [INC](#), estimated per capita consumption in Germany is the highest in Europe, at [147 g/year in 2020](#).

European consumers are becoming increasingly aware of nuts' health benefits. Macadamia nuts are promoted as specifically rich in fibre, magnesium, copper, manganese and thiamine. Another driving force for the increased consumption of macadamia nuts is their taste. Many European consumers find the taste of macadamia nuts appealing and different than other nuts, mostly because of the buttery flavour.

As Europe's main importer and consumer of macadamia nuts, Germany is an interesting focus market. Germany also provides the best opportunities for organically certified macadamia nuts. Germany and the Netherlands are also important trade hubs, with significant re-export of imported macadamia nuts. Other European countries that are large net importers that consume most of the imported macadamia nuts, are Spain, France, the UK and Poland.

Significant quantities of macadamia nuts are also imported into Italy and Luxembourg. This may seem surprising since Luxembourg is one of the smallest European countries, with very limited consumption. The reason for this is the processing and packing capacities for edible nuts that are installed in Luxembourg. So, Luxembourg mainly acts as a transit country.

Germany: the largest European importer and consumer

Germany is Europe's largest importer of macadamia nuts. In 2021, the total German import value was €66.0 million, accounting for 43% of total EU imports. German imports increased by on average 17% in volume annually between 2017 and 2021, reaching 4.4 thousand tonnes in 2021. Consumption of macadamia nuts in Germany increased from 1,389 tonnes in 2017 to 3,481 tonnes in 2021.

Germany is also a large transit country for imported macadamia nuts. On average, Germany re-exports one third of all imported macadamia nuts to other European markets every year. Re-export activities are performed by the specialised traders and agents, many of them located in Hamburg ([the main port of Germany](#)). The main target market for German export in 2021 was the Netherlands, with a 48% export share, followed by France (10%), Slovakia (10%), Poland (7%) and Switzerland and Italy (6% each).

In 2021, Germany imported 30% of its macadamia nuts from the Netherlands, a transit country, followed by South Africa, with a 29% share, transit country Belgium (13%), Kenya (9%), and Malawi and Australia (5% each). Over the past five years, direct imports from producing countries, especially South Africa and Malawi, have been increasing, and the share of imports from transit countries such as the Netherlands and Belgium has decreased. This trend offers better opportunities for emerging suppliers. South Africa is also the fastest growing supply country, increasing its export from 428.8 tonnes in 2017 to 1,295 tonnes in 2021.

Australia, although still the leading exporter of macadamia nuts in the world, is not the strongest supplier on the German market. Australian exports to Germany are relatively stable and have fluctuated around 2 thousand tonnes over the last five years. It is expected that, in the medium to long term, China can become an important macadamia nut supplier to Germany and other European destinations. This expectation is based on the significant increase in growing areas and investments in processing capacities. Currently, Chinese supply has started to increase (181 tonnes in 2021 compared to 16 tonnes in 2017).

German consumption of macadamia nuts is boosted by the healthy snacking trend. Until recently, the macadamia nut has been positioned in the German market mainly as a luxury roasted and salty snack.

However, macadamia nuts are also increasingly being used as an ingredient, especially in spreads (such as [Vitaquell](#), [Nutfields](#), [BioGourmet](#) or [Rapunzerl](#)) and as an ice cream topping. Some examples of the macadamia nut products in the German market are shown in the photos below. Consumption of organic macadamia nuts is also increasing in Germany, led by promotion by specialised suppliers such as the German-Kenyan macadamia nut company – [Limbua](#).

Examples of German macadamia nut importers include [Seeberger](#), [Horst Walberg Trockenfrucht Import](#), [Kluth](#) or [PALM Nuts & More Nuß und Trockenfrucht](#). Some retail brands are [Max](#) (by Max Kiene), [Seeberger](#) or [Farmer's Snack](#). Apart from independent brands, a lot of cashew nuts are sold under the brands of retailers (private labels). Leading private labels include Alesto (by Lidl), Trader Joe's (by Aldi Nord), Farmer (by Aldi Süd), K-Classic (by Kaufland), ja and REWE Beste Wahl (by REWE) and Gut & Günstig and EDEKA (by EDEKA).

Tips:

Find German traders of macadamia nuts on the websites of the specialised German Association - [Waren-Verein](#) and in the [German company directory](#) - Wer Liefert Was.

Learn about how to promote macadamia nut consumption in the German market from the German Edible Nuts Promotion Organisation - [Nucis](#) (website in German only).

The Netherlands: trade hub

The Netherlands is an important importer of macadamia nuts in Europe, accounting for 32% of total European imports in 2021. Its imports increased by on average 10% in volume annually between 2017 and 2021. In 2021, Dutch imports of macadamia nuts reached 3.5 thousand tonnes, accounting for €48.9 million in value. The Netherlands plays an important role as a trade hub in Europe, as 60% of all imported macadamia nut kernels are re-exported to other European countries. Germany is the leading destination of Dutch re-exports of macadamia nuts, importing more than 1 thousand tonnes per year. Between 2017 and 2021, Dutch consumption of macadamia nuts increased from 556 tonnes to 832 tonnes.

The Netherlands imports 70% of its macadamia nuts from developing countries. The leading supplier to the Netherlands in 2021 was Kenya, with a 35% share, followed by South Africa (32%), Australia (18%), Malawi (9%) and Germany and Guatemala (2% each).

Similar to other European countries, consumption of macadamia nuts in the Netherlands is increasing, driven by the healthy snacking trend and the usage of nuts as a substitute for animal proteins. They are mainly used as snacks, and very frequently sold in a mixture with other tree nuts in 150-200g packaging containers. Most of the quantities are sold as private labels packed by specialised companies (for example [Foodtrend](#)). Apart from snacking, macadamia nuts are increasingly being used as an ingredient, especially in cookies.

Dutch consumers and traders of nuts are increasingly demanding sustainable and ethical sourcing. Sustainable sourcing in the Netherlands is strongly supported by several initiatives such as [Sustainable Nut Initiative](#), [Woord en Daad](#) and [Fair Match Support](#). One macadamia nut producer in Kenya ([Jungle nuts](#)) is a member of the Sustainable Nut Initiative, while Woord en Daad is [launching a project](#) to support macadamia nut farmers in Mozambique.

Examples of Dutch macadamia nut importers include [Catz International](#), [Global Trading and Agency](#), [Delinuts](#), [Rhumveld](#) and [Nutland](#). The Netherlands is a highly demanding market, as the majority of macadamia nuts is sold to consumers as private label brands (brands of retailers), such as of [Albert Heijn](#) or [Jumbo](#). The consumption of unbranded, freshly roasted nuts (such as ones sold in paper bags) is also significant. An important shift is seen also in the usage of sea salt vs table salt and roasting vs frying in oil.

Tip:

To learn more about the Dutch macadamia nut market contact the [Dutch Association for trade in dried fruit, nuts, spices and related products](#).

Spain: growing market

Spain is the third-biggest consumer of macadamia nuts in Europe. Spain is a very attractive market for new suppliers, as it consumes most of the imported quantities within the country, without significant re-export. The Spanish supply is very concentrated, with only two big suppliers. South Africa represented 52% of Spanish imports in 2021, followed by Kenya (32%), Australia (6%), the Netherlands (5%) and Belgium and Germany (2% each).

Spanish import levels increased by 19% in volume annually between 2017 and 2021. Imports of macadamia nuts to Spain reached 983.1 tonnes and €15.3 million in 2021. Macadamia nut consumption in Spain increased from 560 tonnes in 2017 to reach 907 tonnes in 2021.

The majority of macadamia nuts in Spain are consumed as a snack. Retail sales are dominated by private labels (retail chain own brands). The leading independent retail brand is [Frit Ravich](#). Some examples of importers include [Importaco](#), [Levantex](#) and [Calconut](#).

Tip:

Visit the website of the [Spanish Sweet Association](#) to find potential users of macadamia nuts as an ingredient on the Spanish market.

France: increase in imports and significant ingredient usage

French imports of macadamia nuts have, on average, increased by 39% in value and 44% in volume annually between 2017 and 2021. The import of macadamia nuts to France reached 350.8 tonnes and €5.6 million in 2021. In 2021, the leading supplier of macadamia nuts to France was the Netherlands, with a 51% volume share, followed by Germany (14%), South Africa (12%) and the United States (10%).

Consumption of macadamia nuts in France increased from 190 tonnes in 2017 to reach 290 tonnes in 2021. The leading suppliers of macadamia nuts to France in 2021 were the Netherlands, with a 35% share, followed by South Africa (32%), Australia (18%), Malawi (9%) and Germany and Guatemala (2% each).

Macadamia nuts in France are mostly consumed as a salty roasted snack, but they are increasingly being used as an ingredient, especially in ice creams. A very popular ice cream brand, which uses macadamia nuts in several ways, is [Häagen Dazs](#). Häagen Dazs is an international brand (with headquarters in the United States), but for the European market it is produced in the French factory of General Mills in Tilloy-lès-Mofflaines.

Tips:

To learn more about the French macadamia nuts market, contact the [French association for the research in fruit and vegetable sector](#) (CTIFL).

If you are not from a French-speaking country, consider investing in French-speaking staff, for easier access to the French market for macadamia nuts.

The United Kingdom: innovative market

The United Kingdom is the fifth-largest importer and consumer of macadamia nuts in Europe. In 2021, the UK's imports reached 318 tonnes and apparent consumption was estimated at 257 tonnes. The import value was estimated at €4.2 million. The United Kingdom re-exports a very small share of imported macadamia nuts (61 tonnes in 2021). This means that the United Kingdom is a net importer of macadamia nuts, and the majority of imported nuts is consumed within the country.

The UK's macadamia nut imports decreased by 10% in value and 7% in volume between 2017 and 2021. The UK is mainly supplied by direct imports from South Africa (203 tonnes in 2021), Australia (34 tonnes in 2021) and Kenya (28 tonnes). Transit countries such as the Netherlands and Italy together contributed 51 tonnes in 2021.

The UK market for macadamia nuts is still developing, with only a couple of direct importers. Macadamia nuts are mainly sold as snacks, but a few companies are also producing fruit and nut bars with macadamia nuts. Other companies use nuts as topping on ice creams (such as the recent launch of ice cream [with salted caramel and Australian macadamia](#) by the company Nuii). Examples of importers are [C.G. Hacking & Sons](#) and [Freeworld Trading](#). One South African exporter of Macadamia Nuts, Green Farms Nut Company, has established a sales office in London.

Tip:

To find macadamia nut importers in the United Kingdom, check the member list of the [UK Nut Association](#). Besides members from the United Kingdom, you can find contact details of companies from France, the Netherlands and Germany.

Poland: an emerging market

Poland is a significant importer and consumer of macadamia nuts in Europe. In 2021, imports reached 314 tonnes, and consumption was estimated at 305 tonnes. Poland re-exports a very small share of imported macadamia nuts. This means that Poland is a net importer of macadamia nuts, and the majority of imported nuts is consumed within the country. In 2021, the leading supplier of macadamia nuts to Poland was Germany, with a 84% volume share, followed by the Netherlands (9%), Spain (3%) and Slovakia (2%).

Annually, imports increased by 34% in value and 40% in volume between 2017 and 2021. Imports of macadamia nuts to Poland increased in volume from 118 tonnes in 2017 to 314 tonnes in 2021. In terms of value, Poland's imports increased from €2.1 million in 2017 to €4.8 million in 2021.

The Polish market for macadamia nuts is still developing, with only a couple of direct importers. Macadamia nuts are mainly sold as snacks, but a few companies are also producing fruit and nut bars with macadamia nuts. Other companies use nuts as topping on ice creams (such as the recent launch of ice cream [with salted caramel and Australian macadamia](#) by the company Nuii). Examples of importers are [Biomika Spolka Z Ograniczona](#) and [KCCP](#).

The increasing demand for healthy snacking combined with the need for stable and sustainable sourcing are the leading driving forces behind the growing consumer interest in macadamia nuts in Europe. With an increase in

interest for vegan diets, the consumption of salty nuts ('healthy snacking') and nut spreads (such as macadamia nut butter) is on the rise. This is because consumers must satisfy their protein needs and deal with lactose intolerances in the absence of animal proteins.

To find out more about general trends, read our study about [Trends on the European Processed Fruit and Vegetables Market](#).

Healthy snacking

Nuts enjoy a good reputation among European consumers. Consumption of nuts is expected to have the highest growth in the snack segment. In major consuming countries, macadamia nuts are considered a healthier alternative to other savoury snacks, such as crisps and extruded snacks, and more beneficial to health than peanuts.

According to research by market research firm [IRI](#), analysis of six markets – the UK, France, Germany, Italy, Spain and the Netherlands – showed that consumers are opting for healthier or lighter products. With busy lifestyles, European consumers are substituting traditional lunch breaks with healthy snacks, with nuts as an important ingredient.

In 2021, the [World Macadamia Organisation \(WMO\)](#) was officially launched to drive greater consumer demand for macadamia nuts. According to the WMO, there are huge opportunities for macadamia nuts in the dairy-alternative category due to the nut's natural buttery taste and indulgent texture. Macadamia nuts' nutritional profile can also help consumers meet certain dietary requirements. WMO further highlighted that these health and texture characteristics put macadamia nuts at the intersection of health and luxury.

Macadamia nuts as ingredient

Macadamia nuts are also increasingly becoming an ingredient in various healthy food and functional food products, such as macadamia fruit and nut bar ([Eat Natural](#)), breakfast cereals ([Byron Bay](#)), macadamia nut butter ([Alnatura](#)), nut bars ([Primal Pantry](#)) and chocolate products with macadamia nuts ([Ritter Sport](#)). Several other applications are also mentioned and illustrated in the chapters above. A particularly high increase in usage is seen in the ice cream industry. Macadamia nuts give a pleasant buttery flavour and specific texture to the ice cream.

The use of macadamia nut oil in cosmetic products is already established in the European market, with plenty of new products and brands. In order to increase the global consumption of macadamia nuts, the Australian Macadamia Society is organising a [Macadamia Challenge](#) competition.

Sustainable sourcing

Sustainability certification in edible nuts trade was once used to target niche markets (such as FairTrade), but now sustainability claims and certification are one of the main trends in the mainstream market. In 2020, the EU established an official policy called the [European Green Deal](#), which includes the [Farm to Fork Strategy](#) and the [Biodiversity Strategy](#). Both policies influence food production and trade. Aspects of the European Green Deal relevant for sourcing macadamia nuts and other nuts from developing countries are: reducing the use of pesticides, increasing organic production, and switching to sustainable packaging materials.

In the edible nuts sector, several large traders joined the [Sustainable Nut Initiative](#) with the objective of stimulating traceability and sustainability. Among many tools to reach this goal, the initiative provides a management information system (3S — Sustainable Supply System). The aim of the system is to stimulate productivity and quality and to create traceability and transparency in the supply chain.

By joining the sustainable nut initiative, developing country suppliers can become more competitive in the European market. The risk assessment helps companies focus on the sustainability risks that are most urgent. Very important competitive advantages can be achieved when taking care of farmers and improving their

livelihood.

One good example of sustainable partnership is the German-Kenyan company [Limbua](#), which has become one of the largest suppliers of organic macadamia nuts in Europe. Limbua is cooperating with 5 thousand small-scale farmers. Instead of buying only raw material in centralised processing facilities, like the majority of the processors do, Limbua operates modern, decentralised production facilities directly at the locations of the small-scale farmers. This approach helps small-scale farmers to add value to their products. Limbua also established a [foundation](#), which supports research and education that promote rural development through sustainable small-scale farming and crop processing.

Tips:

Promote the various applications and nutritional properties of macadamia nuts. However, avoid health or nutritional claims that are not substantiated by scientific evidence. [Check the Health Research Database of INC](#) to find studies that have been published in scientific journals.

Read the [CBI Market Statistics and Outlook study on Processed Fruit, Vegetables and Edible nuts](#) to learn more about the general trade trends and size of specific market segments.


Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fair in Europe that are relevant for macadamia nut trends and trade are [SIAL](#), [Anuga](#) and [BioFach](#)


[Visit SIAL innovation online](#) to gain insight about the latest food innovations in 2020. The physical trade fair is postponed due to the impact of COVID-19, but the organisers of the trade fair have organised an online innovation competition.


This study has been carried out on behalf of CBI by [Autentika Global](#) and updated in 2022 by [M-Brain](#).

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