

# Macadamia Nuts Market Forecasts to 2032 – Global Analysis By Product (In-shell and Shelled), Grade, Nature, Processing Method, Distribution Channel, Application and By Geography

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## Abstracts

According to Statistics MRC, the Global Macadamia Nuts Market is accounted for \$1.86 billion in 2025 and is expected to reach \$3.43 billion by 2032 growing at a CAGR of 9.13% during the forecast period. Macadamia nuts are edible seeds obtained from the evergreen trees of the genus *Macadamia*, primarily native to Australia and now widely cultivated in regions like South Africa, Hawaii, and Latin America. Known for their rich, buttery flavor and creamy texture, they are often consumed raw, roasted, or incorporated into baked goods, confectionery, and savory dishes. Macadamia nuts are highly nutritious, being an excellent source of healthy monounsaturated fats, dietary fiber, vitamins, and minerals such as magnesium and manganese. Their delicate taste and high oil content make them a premium nut in global markets, valued for both culinary and health benefits.

Market Dynamics:

Driver:

Growing health consciousness

Macadamia nuts are rich in healthy fats, antioxidants, and essential nutrients, making them attractive to health-conscious individuals. Rising awareness about heart health, weight management, and plant-based diets further boosts their demand. The trend of clean-label and minimally processed snacks also supports macadamia nut consumption. Moreover, their use in healthy confectionery, bakery, and dairy

alternatives is expanding rapidly. As people prioritize wellness, macadamia nuts are becoming a preferred premium health snack worldwide.

#### Restraint:

##### High production & processing costs

The trees require several years to mature, demanding significant investment before yielding returns. Additionally, specialized labor and advanced processing techniques add to overall expenses. These high costs make macadamia nuts more expensive compared to other nuts, reducing affordability for price-sensitive consumers. As a result, demand growth is restrained, especially in developing markets. This challenge also discourages new entrants, slowing market expansion.

#### Opportunity:

##### Growing online retail & global distribution

E-commerce platforms provide consumers with convenient access to premium and specialty nut products worldwide. Online channels also allow producers to reach niche markets and health-conscious consumers more effectively. At the same time, global distribution partnerships are enhancing supply chain efficiency and ensuring wider product availability. These developments are increasing brand visibility and consumer trust across regions. As a result, both online retail growth and global distribution expansion are propelling the overall market demand for macadamia nuts.

#### Threat:

##### High regulatory burdens & trade complexity

Strict quality, safety, and labelling requirements increase compliance costs, reducing profit margins. International trade regulations and tariffs often make exports less competitive in global markets. Lengthy certification and inspection processes delay shipments and disrupt supply chains. Smaller producers face difficulties meeting these standards, limiting their market access. Overall, these challenges slow down global expansion and restrict growth opportunities for the macadamia industry.

#### Covid-19 Impact

The Covid-19 pandemic had a mixed impact on the macadamia nuts market. Disruptions in global supply chains, labour shortages, and restrictions on trade initially hampered production and distribution. Foodservice closures reduced demand, while retail sales saw an uptick as consumers sought healthy and immunity-boosting snacks. Export challenges and shipping delays affected international trade, impacting growers and processors. However, rising consumer interest in plant-based and nutritious foods supported long-term growth prospects. E-commerce and direct-to-consumer channels also gained traction, helping the market recover gradually.

The shelled segment is expected to be the largest during the forecast period

The shelled segment is expected to account for the largest market share during the forecast period by offering convenience and ready-to-eat options, attracting health-conscious consumers. Its versatility in snacks, confectionery, and bakery products boosts demand across food industries. Higher consumer preference for premium and value-added nut products enhances the growth of this segment. Shelled nuts also reduce processing effort for end-users, strengthening their appeal in retail and foodservice channels. Overall, the segment drives market expansion by meeting modern lifestyle and consumption trends.

The cosmetics & personal care segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cosmetics & personal care segment is predicted to witness the highest growth rate, due to the nut's rich oil content, which is highly valued for skin and hair care products. Macadamia oil is a natural source of essential fatty acids and antioxidants, making it a popular ingredient in moisturizers, shampoos, conditioners, and anti-aging creams. Rising consumer preference for natural and organic personal care products further drives demand for macadamia-based formulations. The oil's lightweight texture and quick absorption enhance its appeal in premium skincare and haircare solutions. Consequently, growing applications in beauty and wellness industries propel market expansion for macadamia nuts worldwide.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to rising consumer preference for healthy snacks and plant-based protein sources. Increasing urbanization, changing dietary habits, and the popularity of premium nuts in confectionery and bakery applications are driving demand. Expanding

retail channels, online platforms, and awareness of macadamia's nutritional benefits further support the market. Countries such as China, Japan, Australia, and South Korea are key contributors, with Australia being a leading producer. The region's focus on exports also strengthens market expansion.

#### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to strong consumer awareness about premium nut varieties. Growing applications in gourmet foods, bakery products, and dairy alternatives are boosting utilization. Health-conscious consumers prefer macadamias for their rich taste and nutritional benefits. The presence of established brands, widespread retail penetration, and innovation in value-added macadamia-based products foster growth. Imports primarily fulfil demand, as domestic production is limited, with Hawaii as a notable contributor. Sustainability and clean-label trends further shape market developments.

#### Key players in the market

Some of the key players profiled in the Macadamia Nuts Market include Marquis Macadamias, Golden Macadamias, Mauna Loa Macadamia Nut Corp, MacFarms, Hamakua Macadamia Nut Company, Nambucca Macnuts Pty Ltd, Wondaree Macadamias, Kenya Nut Company Ltd, Buderim Group, Hawaiian Host Group, Royal Macadamia (Pty) Ltd, Ivory Macadamias, Eastern Produce, Alimentos Selectos S.A. and MWT Foods Australia.

#### Key Developments:

In December 2023, Marquis Macadamias, into joint venture restructuring, acquired full ownership of Marquis Marketing and exited its South African partnership. It established Global Macadamias to handle regional sales, enhancing operational control, customer responsiveness, and shareholder value while preserving global scale efficiencies.

In April 2023, MacFarms acquired by Hawaiian Host Group for \$26 million included 240,000 macadamia trees across 4,000 acres in Kona. This strategic move positioned HHG as the world's largest branded macadamia company, ensuring seamless farming and processing continuity under unified operations.

#### Products Covered:

In-shell

Shelled

Grades Covered:

Whole (Style 0/1)

Halves (Style 2/4)

Chips (Style 5/6/7)

Broken & Industrial Grades

Natures Covered:

Conventional

Organic

Processing Methods Covered:

Raw

Roasted

Salted

Flavored

Macadamia Oil

Macadamia Butter

Other Processing Methods

Distribution Channels Covered:

Offline Retail

Online

Applications Covered:

Food & Beverage

Cosmetics & Personal Care

Nutraceuticals

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

## Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

### **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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