

Horticulture Innovation Australia Ltd

The Almond Board of Australia

Almond Industry Outlook – The Californian Perspective

Richard Waycott, CEO Almond Board of California

18th Australian Almond Conference

Pullman Hotel Melbourne, Albert Park, Victoria October 30th - November 1st, 2018

WHAT DO YOU SEE WHEN YOU GET TO THE TOP OF MT. KOSCIUSZKO?

WHEN YOU GET TO THE TOP OF MT. WHITNEY, ELEVATIONS TEND TO RISE MUCH FASTER.





G EOC BY BETH KOWITT **BIG FOOD UNDER FIRE** New demands for...

trust and transparency food safety food quality

More and nore shoppers a for fresh a d that organic, a najor is costing

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anies some serious market share. Can the giants win you back? Fortune gets inside

GRASPING FOR THE FUTURE

















ENVIRONMENTAL CHALLENGES

SGM Sustainable Groundwater Management

Ingredients:

Deboned Chicken, Chicken Meal, Turkey Meal, Potatoes, Peas, Tomato Pomace, Dried Ground Potatoes, Ground Exseed, Chicken Fat (preserved with Mixed Tocopherols), Natural Chicken Flavor, Pea Fiber, Potas am Chloride, Spinach, Broccoli, Vitamin E Supplement, Carrots, Parsley, Apples, Blueberries, Kale, r Potatoes, Taurine, L-Carnitine, Mixed Tocopherols added to preserve freshness, Zinc Proteinate, W cosamine Hydrochloride, Chondroitin Sulfate. Zinc Sulfate. Calcium Carbonate. Niacin. Ferrous Sulfate.

Ingredients:



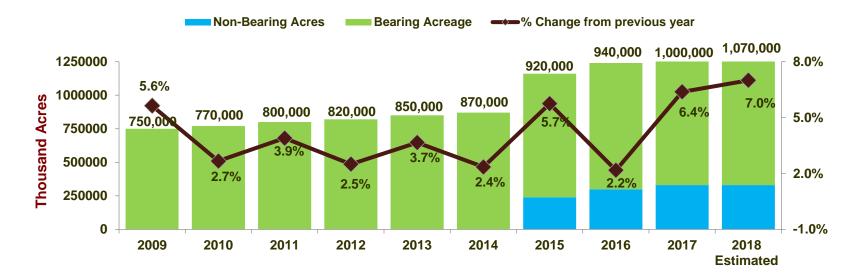




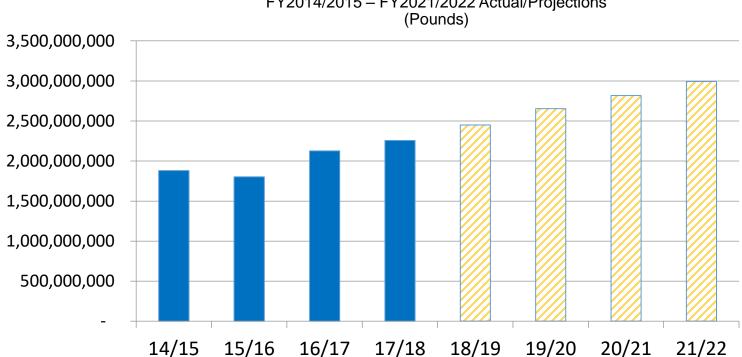


LEADING FOR THE FUTURE MT. WHITNEY 14,505 FEET

CALIFORNIA ALMOND ACREAGE



CALIFORNIA ALMOND PRODUCTION



FY2014/2015 - FY2021/2022 Actual/Projections

+30%

+ 700 MILLION POUNDS (320,000 MT) Increase in Californian Supply

CY 17/18 - CY 21/22

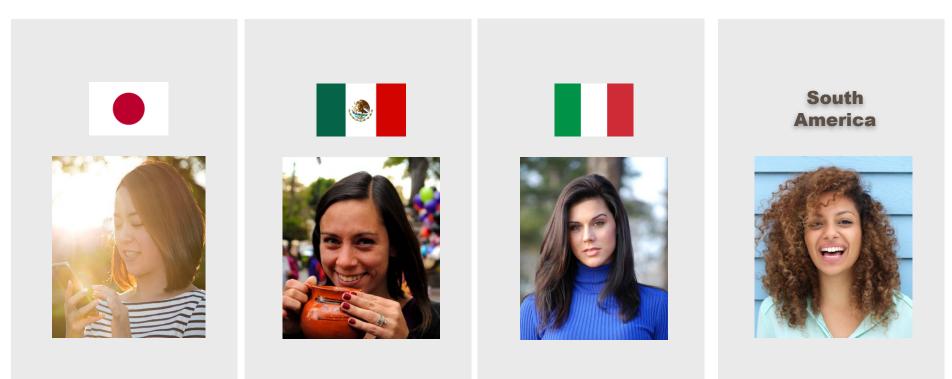


- 1. Creating demand ahead of increased supply
- 2. Accelerated Ag Innovation
- 3. Transforming the consumer landscape

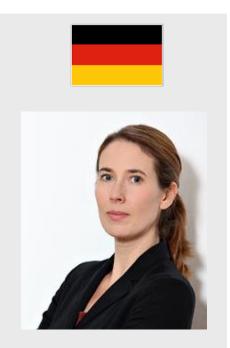
ADDITIONAL GROWER FUNDING \$67 MILLION USD

CY 16/17 - CY 18/19

EXPANSION INTO NEW MARKETS



INCREASING CURRENT MARKETS



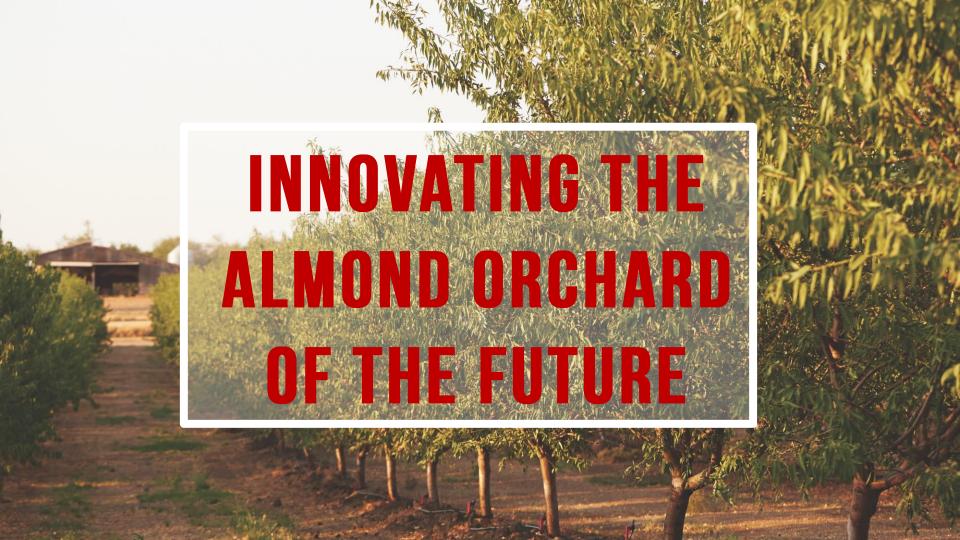








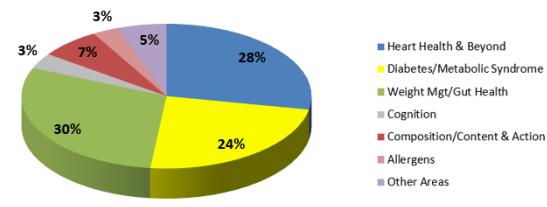








NUTRITION RESEARCH FOCUS



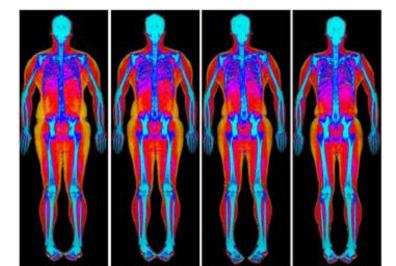
Research Area	# Projects	# Papers
Heart Health & Beyond	22	32
Diabetes & Metabolic Syndrome	19	15
Weight Management, Satiety & Gut Health	25	42
Cognition	3	_
Composition – Content & Action	14	33
Allergens	7	22
Other Areas	15	17
Tota	al 105	161

WEIGHT MANAGEMENT

Does inclusion of almonds in an energy restricted diet enhance weight loss and protect against weight regain?

Principal Investigator: Alison Coates/UNISA, Australia





BODY COMPOSITION AND SATIETY

The effect of almonds on body weight and satiety

Principal Investigator: R. Brown/Univ. of Otago, New Zealand





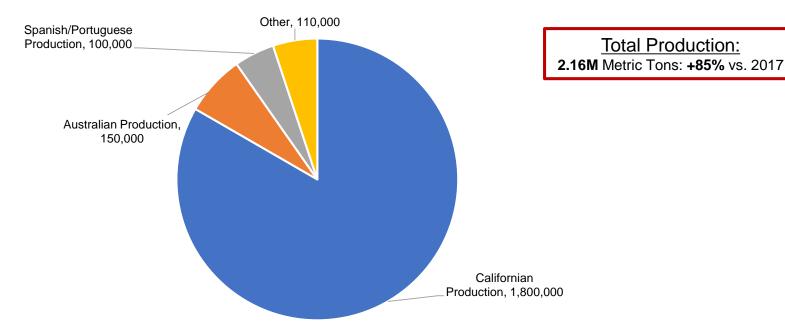






RESPONSIBLE MARKETING MANAGEMENT OF SUPPLY 2018-2030

PRODUCTION (METRIC TONS)



Californian Production = Australian Production = Spanish/Portuguese Production = Other

INVESTING FOR THE LONG TERM





OPPORTUNITY TO WORK TOGETHER



australian almonds

