

# Guide to Australian Almonds 2021

Blossom in August and Harvest in February



# Growing Regions

Where do we grow our Australian almonds? Total area planted to almonds has grown from 3,546 hectares in 2000 to 53,014 hectares in 2019.

## Current almond plantings by variety (hectares)

Variety	TOTAL	Non Bearing	Maturing	Fully Mature	% of Plantings
Butte	54	-	5	49	0.1%
Capella	0.5	-	0	-	0.0%
Carina	305	211	93	-	0.6%
Carmel	12,804	2,694	856	9,254	24.2%
Chellaston	11	-	-	11	0.0%
Fritz	65	-	-	65	0.1%
Independence	544	217	327	0	1.0%
Johnston	36	1	0	35	0.1%
Keane	72	0	2	69	0.1%
Maxima	66	20	46	-	0.1%
Milo	1	-	-	1	0.0%
Mira	31	26	6	-	0.1%
Mission	10	-	-	10	0.0%
Monterey	5,798	3,504	1,789	505	10.9%
Ne Plus	151	-	3	148	0.3%
Nonpareil	24,487	6,603	3,712	14,172	46.2%
Other	1,881	618	1,246	17	3.5%
Padre	50	-	5	45	0.1%
Peerless	437	4	53	381	0.8%
Price	4,130	288	442	3,400	7.8%
Rhea	16	-	16	-	0.0%
Somerton	15	-	-	15	0.0%
Wood Colony	2,042	926	1,113	3	3.9%
<b>Grand Total</b>	<b>53,014</b>	<b>15,111</b>	<b>9,713</b>	<b>28,190</b>	<b>100.0%</b>

**2019 Industry Total 53,014 hectares**

29% of orchard planting are not yet bearing.

Regions shown on map: Swan, Adelaide, Riverland, Sunraysia, Riverina.



Sunraysia (VIC)  
**47%**  
24,786 HA



Riverina (NSW)  
**31%**  
16,234 HA



Riverland (SA)  
**20%**  
10,571 HA



Swan (WA)  
**1%**  
753 HA



Adelaide Plains (SA)  
**1%**  
669 HA

# Production

Australian almonds are a Southern Hemisphere crop, harvesting in February



2019-20  
Production by Variety



Nonpareil 46%  
24,487 T

Carmel 24%  
12,804 T

Price 8%  
4,130 T

Monterey 11%  
5,798 T

2020  
Crop Estimate  
110,780  
tonnes



2021															120,000**
2020															110,780*
2019															104,437
2018															79,901
2017															79,477
2016															82,333
2015															82,509
2014															65,060
	5,000	15,000	25,000	35,000	45,000	55,000	65,000	75,000	85,000	95,000	105,000	115,000	125,000		

Tonnes \* ESTIMATE based on marketers' assessments. \*\* FORECAST based on plantings data.

# Our Almonds

Where Australian almonds are graded as:  
Fancy, Extra Supreme, Supreme, Select Sheller Run & Manufacturing.



## Value-Added Almond Range:



## Kernel Size

Kernel Size Varies across varieties and dictates the number of almonds per ounce.

### Nonpareil



### Carmel



### Price



# Major export regions 2019-20

The key features of the Australian Almonds export development program are our major trade exhibitions.

2019-20 marketing year  
total export value  
\$772 million



Country Region	QTY Kernel	Value Kernel	QTY Inshell	Value Inshell	Value Total	Percent
Asia Pacific & Oceania	23,951	\$253,828,081	47,182	\$345,246,394	\$599,074,475	77.5%
Europe	13,742	\$125,460,115	42	\$343,551	\$125,803,666	16.3%
Middle East & Africa	3,768	\$35,669,461	52	\$245,762	\$35,915,223	4.6%
Americas	1,960	\$11,300,939	61	\$514,700	\$11,815,639	1.5%
<b>Total</b>	<b>43,421</b>	<b>\$426,258,596</b>	<b>47,337</b>	<b>\$346,350,407</b>	<b>\$772,609,003</b>	

# Australian Export Markets 2019-20 Marketing Year

		INSHELL (TONNES)	KERNEL (TONNES)	TOTAL KWE (TONNES)	TOTAL KWE (SAUD)	% CHANGE FROM 2018 MY	
Asia Pacific	NORTH EAST ASIA	CHINA (EXCLUDES SARS AND TAIWAN)	33,786	16,212	39,862	\$ 423,064,746.00	236%
		HONG KONG (SAR OF CHINA)	20	1	15	\$ 184,516.00	-94%
		JAPAN	2	637	638	\$ 6,920,261.00	-23%
		KOREA, REPUBLIC OF (SOUTH)	-	100	100	\$ 1,106,165.00	10196%
		TAIWAN	-	47	47	\$ 504,678.00	5213%
	<b>TOTAL NORTHEAST ASIA</b>		<b>33,808</b>	<b>16,996</b>	<b>40,661</b>	<b>\$ 431,780,366.00</b>	<b>214%</b>
	SOUTH EAST ASIA	BRUNEI DARUSSALAM	-	0.0	0.0	\$ 955.00	-78%
		CAMBODIA	-	11	11	\$ 142,161.00	-2%
		INDONESIA	-	337	337	\$ 3,369,131.00	20%
		MALAYSIA	-	40	40	\$ 386,583.00	-36%
		PHILIPPINES	0	148	149	\$ 1,856,290.00	99%
		SINGAPORE	-	314	314	\$ 4,489,291.00	35%
		THAILAND	-	1,255	1,255	\$ 12,715,235.00	11%
		VIETNAM	805	2,226	2,789	\$ 26,798,781.00	-69%
	<b>TOTAL SOUTHEAST ASIA</b>		<b>805</b>	<b>4,332</b>	<b>4,895</b>	<b>\$ 49,758,427.00</b>	<b>-54%</b>
	SOUTH/CENTRAL ASIA	INDIA	12,283	1	8,599	\$ 85,168,223.00	-43%
		PAKISTAN	-	529	529	\$ 5,051,187.00	
		<b>TOTAL SOUTH/CENTRAL ASIA</b>		<b>12,283</b>	<b>530</b>	<b>9,129</b>	<b>\$ 90,219,410.00</b>
	AUSTRALASIA/OCEANIA	FIJI	-	12	12	\$ 131,555.00	68%
		NEW ZEALAND	286	2,081	2,281	\$ 27,169,348.00	30%
PAPUA NEW GUINEA		0	0	1	\$ 14,212.00	5%	
<b>TOTAL AUSTRALASIA/OCEANIA</b>		<b>286</b>	<b>2,093</b>	<b>2,294</b>	<b>\$ 27,316,272.00</b>	<b>31%</b>	
<b>TOTAL ASIA PACIFIC</b>		<b>47,182</b>	<b>23,951</b>	<b>56,979</b>	<b>\$ 599,074,475.00</b>		
Europe	WESTERN EUROPE	BELGIUM	-	113	113	\$ 1,126,836.00	-53%
		DENMARK (INCLUDES GREENLAND AND FAROE ISLANDS)	-	1,054	1,054	\$ 9,275,129.00	18%
		FRANCE (INCLUDES ANDORRA AND MONACO)	-	535	535	\$ 4,958,820.00	-49%
		GERMANY	22	5,516	5,531	\$ 52,238,541.00	53%
		GREECE	20	154	168	\$ 1,591,270.00	-2%
		ITALY (INCLUDES HOLY SEE AND SAN MARINO)	-	367	367	\$ 3,347,560.00	-58%
		NETHERLANDS	-	1,294	1,294	\$ 12,632,506.00	11%
		NEW CALEDONIA	-	1.7	1.7	\$ 17,872.00	526%
		SPAIN	-	3,179	3,179	\$ 25,661,501.00	-19%
		SWEDEN	-	60	60	\$ 535,658.00	0%
		SWITZERLAND (INCLUDES LIECHTENSTEIN)	-	255	255	\$ 2,599,399.00	-13%
		UNITED KINGDOM, CHANNEL ISLANDS AND ISLE OF MAN, NFD	-	810	810	\$ 7,690,324.00	-30%
	<b>TOTAL WESTERN EUROPE</b>		<b>42</b>	<b>13,339</b>	<b>13,368</b>	<b>\$ 121,675,416.00</b>	<b>0%</b>
	CENTRAL & EASTERN EUROPE	CROATIA	-	76	76	\$ 913,079.00	-21%
		POLAND	-	310	310	\$ 3,047,415.00	-34%
		<b>TOTAL CENTRAL &amp; EASTERN EUROPE</b>		<b>-</b>	<b>403</b>	<b>403</b>	<b>\$ 4,128,250.00</b>
	<b>TOTAL EUROPE</b>		<b>42</b>	<b>13,742</b>	<b>13,771</b>	<b>\$ 125,803,666.00</b>	<b>-2%</b>
Middle East & Africa	MIDDLE EAST	LEBANON	0	0	0	\$ 2,192.00	-100%
		QATAR	0	292	292	\$ 3,013,351.00	100%
		SAUDI ARABIA	1	382	382	\$ 3,396,417.00	-15%
		TURKEY	-	1,396	1,396	\$ 13,693,983.00	56%
		UNITED ARAB EMIRATES	-	963	963	\$ 9,235,852.00	-11%
	<b>TOTAL MIDDLE EAST</b>		<b>1</b>	<b>3,034</b>	<b>3,034</b>	<b>\$ 29,341,795.00</b>	<b>-7%</b>
	NORTH AFRICA	ALGERIA	-	20	20	\$ 126,202.00	-61%
		EGYPT	-	214	214	\$ 1,970,386.00	44%
		LIBYA	52	224	260	\$ 1,833,072.00	22%
	<b>TOTAL NORTH AFRICA</b>		<b>52</b>	<b>458</b>	<b>494</b>	<b>\$ 3,929,660.00</b>	<b>19%</b>
SUB-SAHARAN AFRICA	SOUTH AFRICA	-	277	277	\$ 2,643,768.00	1%	
	<b>TOTAL SUB-SAHARAN AFRICA</b>		<b>-</b>	<b>277</b>	<b>277</b>	<b>\$ 2,643,768.00</b>	<b>-3%</b>
<b>TOTAL AFRICA &amp; MIDDLE EAST</b>		<b>52</b>	<b>3,768</b>	<b>3,805</b>	<b>\$ 35,915,223.00</b>	<b>-4%</b>	
Americas	LATIN AMERICA & CARIBBEAN	ARGENTINA	-	34	34	\$ 326,583.00	-87%
		<b>TOTAL LATIN AMERICA/CARRIBBEAN</b>		<b>-</b>	<b>34</b>	<b>34</b>	<b>\$ 326,583.00</b>
	NORTH AMERICA	CANADA	-	25	25	\$ 254,766.00	481%
		<b>TOTAL NORTH AMERICA</b>		<b>-</b>	<b>25</b>	<b>25</b>	<b>\$ 254,766.00</b>
	UNITED STATES	UNITED STATES OF AMERICA	61	1,902	1,944	\$ 11,234,290.00	-2%
		<b>TOTAL UNITED STATES</b>		<b>61</b>	<b>1,902</b>	<b>1,944</b>	<b>\$ 11,234,290.00</b>
<b>TOTAL AMERICAS</b>		<b>61</b>	<b>1,960</b>	<b>2,002</b>	<b>\$ 11,815,639.00</b>	<b>-13%</b>	
<b>World Total</b>		<b>47,336</b>	<b>43,421</b>	<b>76,556</b>	<b>\$ 772,609,003.00</b>	<b>26%</b>	

Source: ABS, ABA



# ALMONDCO

PREMIUM AUSTRALIAN ALMONDS



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## Our quality commitment

Our point of difference is quality. We know this because our customers consistently tell us. We are proudly accredited under the British Retail Consortium (BRC), and our in-house 'Almondco Quality System' (AQS) incorporates ISO and HACCP, surpassing national and USDA industry standards.

## We are proud of our technology

- # Dedicated, purpose built processing plant.
- # State of the art, in-line, chemical free pasteurisation technology
- # Optimal food safety treatment of each, individual almond
- # Maintains the same great taste, essential nutrients & sensory appeal

## A name synonymous with premium quality

Exporting to over 40 countries, we are committed to consistently delivering premium Australian almond products to our customers.

## About Almondco

Established in 1944, Almondco Australia has grown to become a leading marketing strength of the Australian almond industry, processing a major share of Australian almond production at our world-class facility in Renmark, South Australia.

## Grower focus

Almondco sources product from over 85% of Australian almond growers, located throughout Australia's finest almond growing regions: Adelaide, Riverland, Sunraysia and Riverina.





**Bright  
Light**  
AGRIBUSINESS

### Bright Light Agribusiness

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## Bright Light Agribusiness

Is the largest and fastest growing private company in Australia. We grow our almonds with the latest irrigation infrastructure & technologies. The orchards contain trees ranging in age from recently planted through to full maturity, with increasing production as the younger trees develop.

Our almonds are grown throughout the Sunraysia region of Victoria. One of our great advantages is that we offer our new season Australian almonds to the world at their freshest when the Northern Hemisphere growers are in their off season.

Our range of almonds consists of Nonpareil, Carmel, Monterey and Price varieties, which we harvest utilising highly mechanised equipment. We export to the World.







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When you deal with NPA, you deal direct with the grower and the processor. There is no middle man. We are able to control everything from tree to trade.

NPA is one of the major processors of almonds in Australia. We can provide all major varieties and sizes of Australian grown almonds and we specialise in the supply of brown kernels and inshell. The Riverland region of Australia is recognised as having an ideal climate for almond growing. Our NPA almonds are sold under the Riverland Almond brand.



Our modern factory, located at Loxton, South Australia, is modelled on world best practice and utilises up to date sorting technology. We pack our almonds to international standards, whilst still having the flexibility to meet specific customer requirements and specifications.

## About NPA

The vast majority of NPA almonds are grown by its shareholders and directors. They are pioneers of the Australian almond industry, with almost 150 years of combined experience in the growing, processing and marketing of Australian almonds. At NPA, we endeavour to understand your nut business, so we can best serve your requirements. Being a dynamic organisation, we can react quickly to the needs of our customers, by tailoring our products to suit the peculiarities of the markets within which they operate.



**The NPA almond range includes natural brown almond kernels, inshell almonds, blanched and value-added almonds.**

## Our Quality Promise

NPA Almonds has a well established quality culture. Our employees are committed and strictly adhere to quality control procedures, HQF2000 accreditation and complies with Australian grocery retailer vendor quality management systems.

Almonds are supplied fresh from the orchards and our finished product is sampled and independently tested. All growers maintain externally audited quality management systems.





# Olam Edible Nuts

## Olam Orchards Australia

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[www.olamonline.com](http://www.olamonline.com)



Olam is the largest grower of almonds globally with over 37,000 acres of orchards in Australia and over 9,500 acres in California.

All almonds that Olam supplies from Australia are grown on our own orchards. Almonds require a Mediterranean climate and are therefore commercially produced in very few locations around the world.

Olam is the only company globally growing almonds in both hemispheres. Hence, Olam is able to deliver new season almonds to consumers on a constant basis.

Our orchards predominantly grow Nonpareil, Carmel and Price varieties across 12 farms totalling 37,000 acres in the prime almond growing regions in Southern Australia. The farms have state of the art irrigation infrastructure and technology and incorporate high levels of mechanisation. We adopt the latest agronomy practices to produce excellent yields and quality of almonds. Olam has built one of the world's largest hulling, shelling and processing facilities to accommodate our entire production in Australia. This state of the art facility will ensure consistent product quality, traceability and food safety. Olam is the only company to invest in our own marketing and distribution offices in all major almond consuming regions, which enables us to provide superior customer service in all these markets.

## Olam Middle East & Africa DMCC

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# SELECT HARVESTS



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Select harvests has a modern processing plant based in northern victoria with state of the art technology.

## About select harvests

Select Harvests is a grower, processor and marketer of quality Australian almonds based in North West Victoria. We process our almond varieties, Nonpareil, Carmel and Price on State of the art electronic machinery, providing the customer with quality assured material. In addition to packing natural almonds, we also specialise in inshell almonds, blanched almonds and consumer packs. We service a range of export markets including India, Asia, the Middle East and Europe and we sell branded and non branded consumer products to Australian supermarkets.

## Robinvale processing facility

A key component of our integrated business model is our state-of-the-art Robinvale processing facility. Robinvale has the capacity to process up to 40,000 tonnes of almonds. The latest automation technology ensures maximum efficiency, flexibility, product quality and food safety management.

## Quality

This facility helps drive the company's continuous quality improvement program. Investing in leading electronic sorting equipment ensures a highly accurate grading process. Climate controlled warehousing ensures product freshness and improved shelf life. An on-site chemical testing laboratory undertakes quality analysis prior to shipment. Our accreditations include HACCP and SQF. We also have pasteurisation technology available to further enhance product safety and quality. Select Harvests operates under an approved sustainability program.

Contact: Laurence Van Driel    lvandriel@selectharvests.com.au

## Value added processing

Select Harvests undertakes a range of value added processes to meet the needs of its customers from food manufacturers, distributors, retailers and consumers. Activities include blanching, roasting, flavouring, cutting, blending, and packaging to satisfy a number of retail and industrial requirements.



# Australian Almond Processors and Exporters



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