



# ALMOND 2020-21 INSIGHTS

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**The Almond Board of Australia is pleased to provide this publication that gives a statistical insight into the story of Australia's almonds.**

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## ABA ROLE


The Almond Board of Australia is guiding the industry's development by producing and implementing the almond industry's strategic plan that addresses a wide range of productivity and market development challenges and opportunities.

These include yield improvement and risk management, surety and cost of inputs and their efficient and sustainable use, better management of pests and diseases, building domestic and export consumption, and brand awareness of Australian Almonds in export markets.

The overall aim is to enhance the viability of industry participants and provide an efficient operating environment.

To achieve these strategies, the ABA relies on the knowledge of its Board, staff, industry members, research providers, suppliers, and experts in specialist areas.

The ABA Board, comprising an independent Chair, seven grower directors and four marketer directors, oversees the operations of the ABA. The diverse programs undertaken by ABA staff and contracted consultants are supported by a voluntary marketing levy, project funding, and commercial activities.



AUSTRALIAN EXPORTS =  
**\$545.3**  
**MILLION**  
2020/21





## INTRODUCTION

The growth of the Australian almond industry continued in 2020-21 with an additional 1,672 hectares planted taking the total orchard area to 58,523 hectares. The 2020-21 Australian almond crop represented steady growth at 114,427 tonnes which is 10% higher than the previous year. Production is forecast to be 127,000 tonnes in 2021.

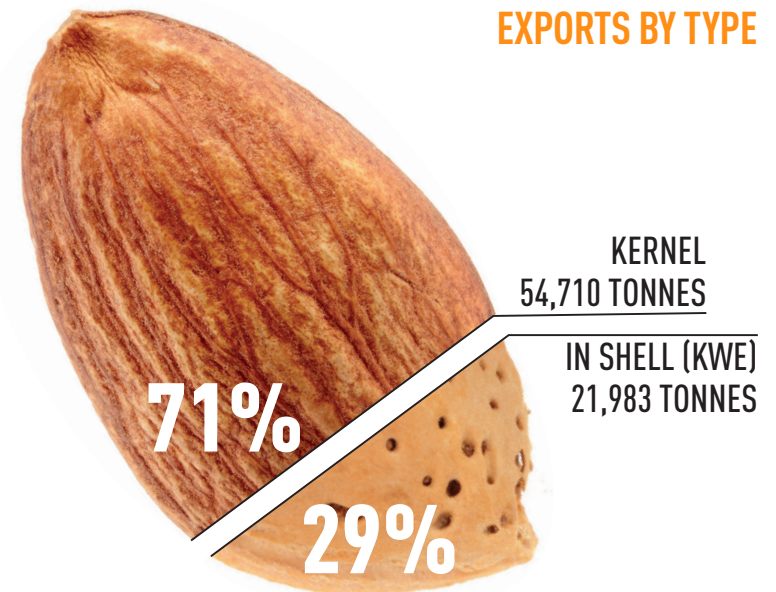
This year's Almond Insights covers a year like no other due to the COVID-19 pandemic and a large increase in global almond supply due to a 17% increase in the Californian almond crop. Global almond pricing fell sharply to clear the increased 2020 production. This price reduction has seen almond demand surge with US marketers setting new record monthly shipments. The capacity of the Californian industry to maintain production levels in the face of the extreme drought and heatwave conditions will likely move global supply and demand back to a balanced position at more viable pricing.

Apart from reduced product pricing, the prospect for global almond demand growth lies in three major trends: sustainable food production for a growing world population in a changing climate; good nutrition and good health; and food innovation driving growth in plant-based foods. These three drivers are the basis for our industry's market development program.

The domestic sales of almonds during 2020-21 maintained Australia's strong per capita average consumption figure. Total almond sales in Australia, including imports, were 31,603 tonnes giving an average per capita consumption of 1.24 kilograms, one of the highest in the world.

Australian almond export sales at 76,693 tonnes for 2020-21 remained steady with last year. The major trade movements were shipment growth to India (36%), Europe (24%) and the Middle East (43%). Exports of Australian almonds to China decreased by 35%. Despite the fall in tonnage shipped, the Chinese demand for Australian almonds remained strong at 26,019 tonnes

## AUSTRALIAN ALMOND EXPORTS BY TYPE



## INDUSTRY OVERVIEW

The history of the Australian almond industry reaches back to 1836 when the first almonds were planted in Australia on Kangaroo Island. They soon spread to private gardens throughout Adelaide and other South Australian towns.

Currently, Australian almond production occurs from the Northern Adelaide Plains to the Riverland, Sunraysia and Riverina regions. The most recent area to be planted commercially is the Swan region in Western Australia.

In the past twenty years, the Australian almond industry has grown significantly. From plantings of 3,546 hectares in 2000, production has grown to 58,523 hectares in 2020. 19% of these orchards are not yet bearing crop and a further 33% are not yet mature. Sunraysia produces the largest volumes of almonds followed by the Riverland then the Riverina that has a high percentage of new plantings and will soon be a large contributor to the national crop.

This sixteen-fold increase in plantings since 2000 has taken the number of almond trees planted to more than 17 million. It is important to note that the farming inputs for our orchards such as water and the work of bees produce value in multiple ways: from the almond kernels for human nutrition and health, to the almond hull and shell for animal stockfeed, to the carbon stored by the trees and oxygen released back into our environment.

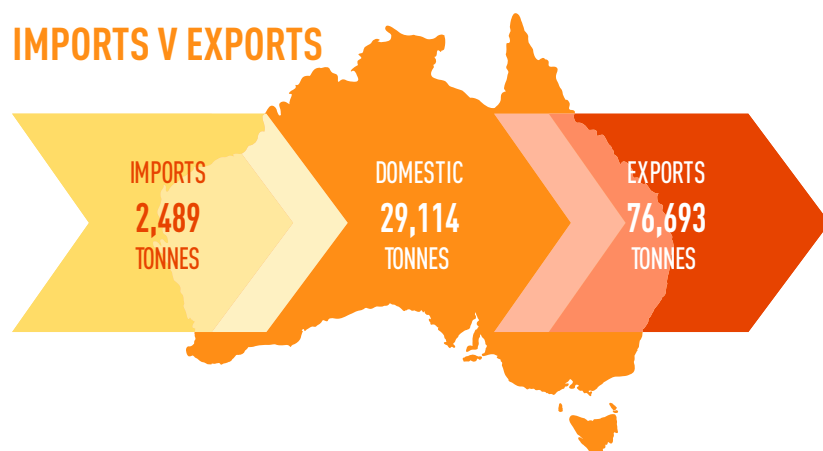
Recent economic modelling by RMCG highlights the substantial contribution the Australian almond industry makes to our Murray River communities and to the Australian economy more broadly. In 2020, the economic contribution of the Australian almond industry was \$1.633 billion. This means that one dollar in every thousand dollars of Australia's GDP is the product of growing Australian almonds. The Australian almond industry also contributes around 10,000 jobs to the Australian economy with this figure increasing as the industry's crops are rapidly growing in size.

The almond value chain is comprised of four segments: growing, hulling and shelling, sorting and packing, and value adding. Once almonds have been packed or processed for use in further food manufacturing, the products are ready for the wholesale, food service, retail, or export markets. The largest growers are vertically integrated to encompass processing, packing, domestic and export marketing of their own almonds.

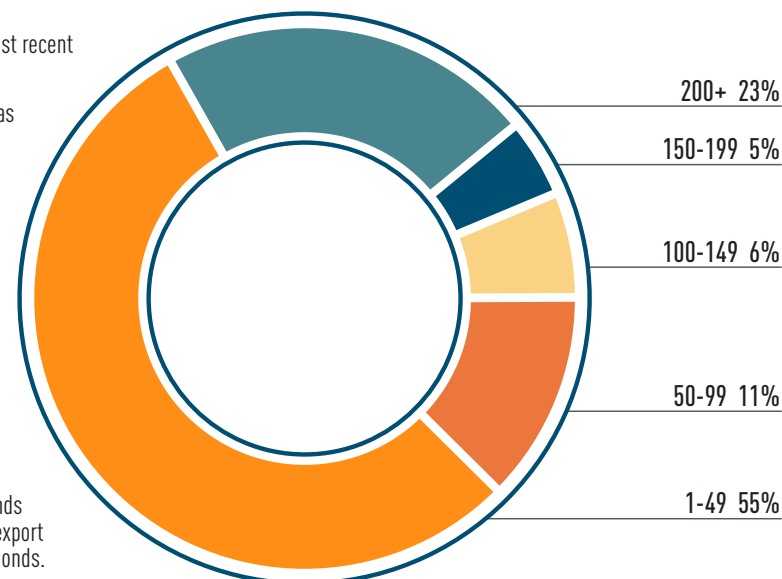
In 2020 Australia harvested 114,426 tonnes of almonds. Exports during the 2020-21 marketing year (March to February) were valued at \$545 million. Most of Australia's exported almonds were sent to Asia Pacific and Oceania (67%) and Europe (22%). In terms of almond types exported, 54,710 tonnes (71%) were almond kernels, and 21,983 tonnes (29%) were inshells. Over the last 10 years total exports have increased from 21,315 tonnes (kernel weight equivalent) to 76,693 tonnes in the 2020-21 marketing year. The domestic market has increased over the same period from 15,631 to 31,603 tonnes.

Quality and food safety are key elements underpinning worldwide demand for Australian almonds. This aspect is addressed through on-farm management practices, biosecurity and quarantine, and development and implementation of industry quality standards and testing programs. The importance of quality is addressed through the entire supply chain.

## IMPORTS V EXPORTS



## INDUSTRY

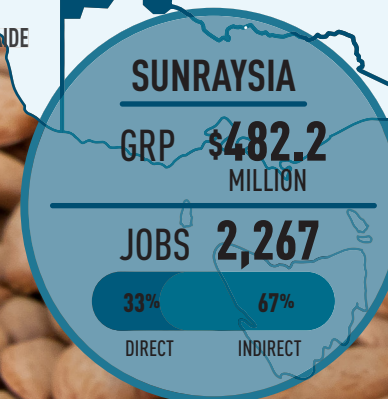
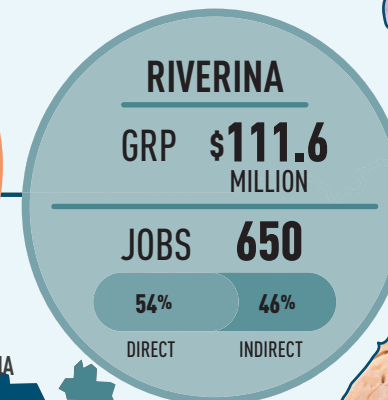
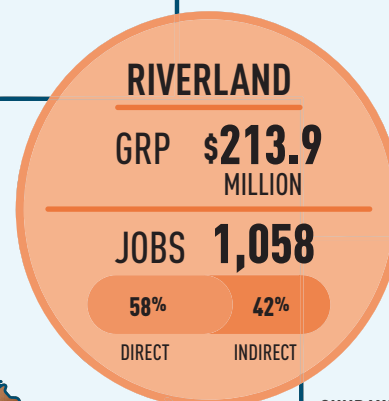
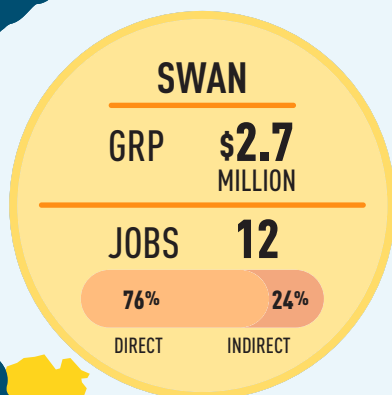


**66%**  
AUSTRALIAN ALMOND  
PROPERTIES ARE LESS  
THAN **100ha**

# ECONOMIC CONTRIBUTION OF THE ALMOND INDUSTRY



THE TOTAL AREA PLANTED WITH  
ALMONDS INCREASED FROM  
**3,500HA** TO **58,000HA**  
IN 2000 IN 2020



## PLANTINGS

VARIETY	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Grand Total
BAXENDALE															9.04
BUTTE	39.59	7.12						9.86							60.86
CAPELLA							0.48								0.48
CARINA							0.62		3.64	89.41	107.35	108.12	3.21	22.97	335.32
CARMEL	2,229.40	633.28	90.18	180.42	463.11	34.35	87.94	146.30	231.46	760.49	1,354.40	1,025.59	944.95	351.65	13,955.32
CHELLASTON															11.31
DAVEY															0.21
FRITZ															61.10
GATHERCOLE															0.06
INDEPENDENCE		0.40						71.56	77.98	177.19	132.47	60.01	24.04	22.93	566.58
JOHNSTON		0.12	0.15	1.21	0.19				0.04			1.21			35.97
KEANE	14.36	4.79	1.78	2.23			1.46			0.89	0.19				66.58
MAXIMA							0.62			48.81	4.68	16.30		0.81	71.22
MILO															0.57
MIRA							0.53			5.37	3.00	22.75			31.65
MISSION															13.92
MONTEREY	53.01	13.18	80.85	61.97	171.32	17.59	71.04	88.06	522.15	1,302.41	1,795.94	1,079.92	970.40	307.50	6,636.90
NE PLUS					0.19	0.51			2.60	0.30					155.23
NONPAREIL	3,148.16	939.57	171.87	254.52	734.79	64.68	181.62	335.36	995.17	2,825.32	3,144.40	2,210.17	2,255.94	770.57	26,728.11
OTHER		0.00	2.93						49.23	2,208.98	172.94	92.47	351.83	95.06	2,987.44
PADRE	39.27	2.86						9.86							56.27
PEERLESS	52.89	10.04	1.81	2.01	1.79	1.94	2.16	13.22	8.03	42.01	3.63				458.29
PRICE	785.43	265.01	12.23	19.13	94.56	10.61	14.94	46.45	124.79	270.41	141.24	146.25	1.81	6.06	4,096.78
RHEA							0.62			15.00					15.62
SAURET															0.20
SOMERTON				0.40						0.00					15.35
WOOD COLONY					3.10		0.20	28.44	120.35	963.57	645.85	92.21	205.00	94.10	2,152.83
GRAND TOTAL	6,362.12	1,876.36	361.79	521.89	1,469.05	129.67	362.22	749.09	2,135.44	8,710.16	7,506.09	4,855.01	4,757.18	1,671.66	58,523.22

4,097

PRICE

6,637

MONTEREY

13,955

CARMEL

26,728

NONPAREIL

7,106

OTHERS

58,523

TOTAL HECTARES

46% OF AUSTRALIAN PLANTINGS ARE NONPAREIL

## TREES BY STATE

THERE ARE OVER  
**17.1 MILLION**  
ALMOND TREES  
PLANTED IN AUSTRALIA

1%  
223,395

20%  
3,374,776

34%  
5,833,521

45%  
7,643,807

## PLANTINGS BY REGION

669

ADELAIDE

17,612

RIVERINA

11,163

RIVERLAND

28,326

SUNRAISIA

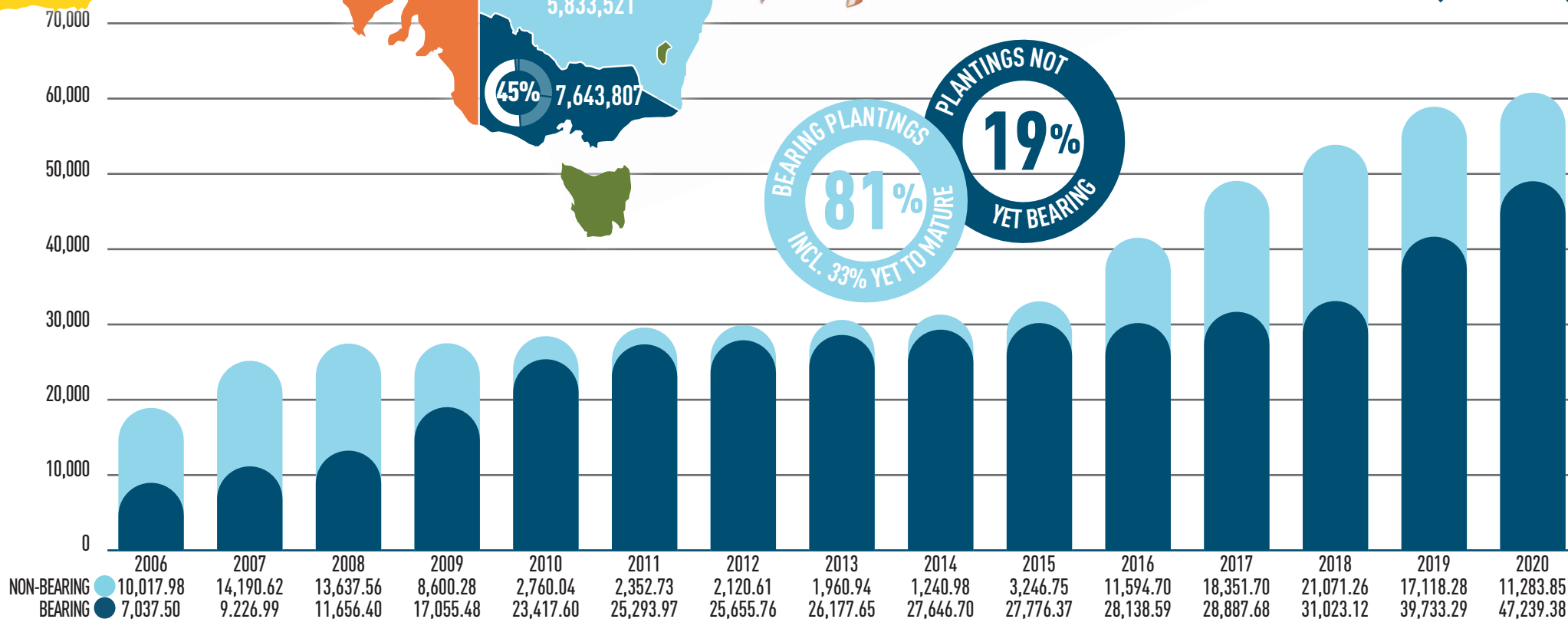
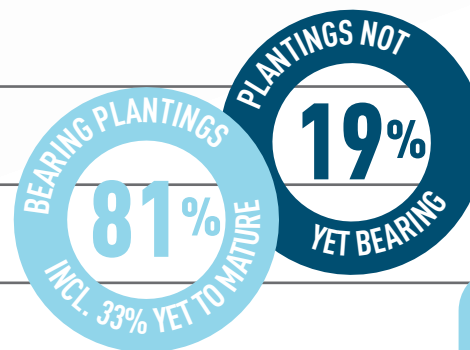
753

SWAN

58,523

TOTAL HECTARES

## TOTAL AUSTRALIAN ALMOND AREA PLANTED (HECTARES)



## ENVIRONMENT

### THE AUSTRALIAN SUSTAINABLE ALMONDS PROGRAM

The past twenty years of growth reflects an Australian almond industry that is innovative, efficient and responsive. The industry is committed to reducing our environmental footprint, maximising value and ensuring the sustainability of almond growth and production in Australia.

As part our commitment to a sustainable industry, a new program has been initiated called the Australian Sustainable Almonds Program. The objectives of this Program are to create an industry-wide, holistic program of continuous improvement in relation to the environmental sustainability of the Australian almond industry; to generate industry-wide engagement to identify strengths, weaknesses, and opportunities; and to use the industry responses as credentials of key industry achievements.

The Australian Sustainable Almonds Program uses the 'Australian-Grown' Horticulture Sustainability Framework, initiated and funded by Hort Innovation, as our foundation. Our program's structure is built around four key pillars: Nourish and Nurture, People and Enterprise, Planet and Resources, and Less Waste.

To support the development of this program, the ABA has established a Sustainability Committee with representation across the grower, processing and marketing segments of the industry.

### WATER USE EFFICIENCY

Australian almond growers are world leaders in the efficient use of water. Almonds are one of Australia's highest value, efficient and environmentally aware irrigation industries.

The Almond Board of Australia continues to implement our water policy which aims "To ensure the Murray Darling Basin river system and its environs are healthy and can sustainably support a prosperous, diverse irrigated agricultural sector and its communities".

The ABA has supported this objective by leading the call for a moratorium on State governments in the Murray Valley issuing new water use licences that threatens the future capacity to deliver water to existing irrigators thereby maintaining a diversity of farm production. In 2019, the Victorian government acted on this and amended its approval process on selling annual use limits to new irrigation developments and has called on other States to do likewise.

Without all States acting to restrict further water use in the mid to lower Murray ongoing development will occur at a time when floodplain harvesting of water destined for the Darling River and limits on water volumes that can be sent through the Barmah Choke on the Murray River already means delivery surety in Summer is very uncertain.

Water is a vital input into food production whether that be raising animals or growing crops. The Australian almond industry is committed to continuous improvement in its water use efficiency. Many significant growing operations are reporting that they have reduced water applied to 12.5 megalitres per hectare. Along with reduced water application, the average industry yield per hectare has risen to 3.4 tonnes of kernel, thereby continuing to improve the water use efficiency of the Australian almond industry.

The almond industry has invested heavily in sophisticated irrigation systems with 95% of orchards using drip irrigation. Water application rates are closely controlled through precise timing and irrigation rates to meet tree requirements whilst also minimising environmental impact. The remaining 2% of orchards use low level and micro sprinklers.

### BEES AND POLLINATION

Almonds and honeybees are vital to one another. Almond blossoms provide one of the first natural sources of food for bees each spring and healthy hives arriving at orchards continue to strengthen during their stay. The almond industry used over 240,000 hives during the 2020 pollination season with this number rising as young trees mature.

Hives begin to arrive at the almond orchards just before the trees begin to blossom in July and continue to enter as flower numbers in the orchards increase. Whilst the bees move from tree to tree, they cross pollinate blossoms with pollen from other varieties. In almonds, nuts will only develop when a flower has been correctly pollinated, so the bees are very important and are treated with care. Hives are placed in open spaces to allow the sun to warm the bees, water is distributed throughout the orchard and growers are now planting flowering cover crops between trees to give the bees a more diverse diet.

Hives arriving on almond orchards benefit from the almond blossoms that are an excellent source of nutrients for bees. After almond bloom many beekeepers split the hives to increase their hive numbers. After almonds, beekeepers move their bees to pollinate other crops or to produce honey.

The almond industry in paying beekeepers to bring their hives during orchard bloom is supporting honeybee numbers and the viability of beekeepers.

### HIGH HEALTH BUDWOOD PROGRAM

The ABA produces high health status varietal budwood for nurseries to ensure plantings have the best start possible. This material is produced at ABA managed mother planting sites that are tested annually for a wide range of viruses.

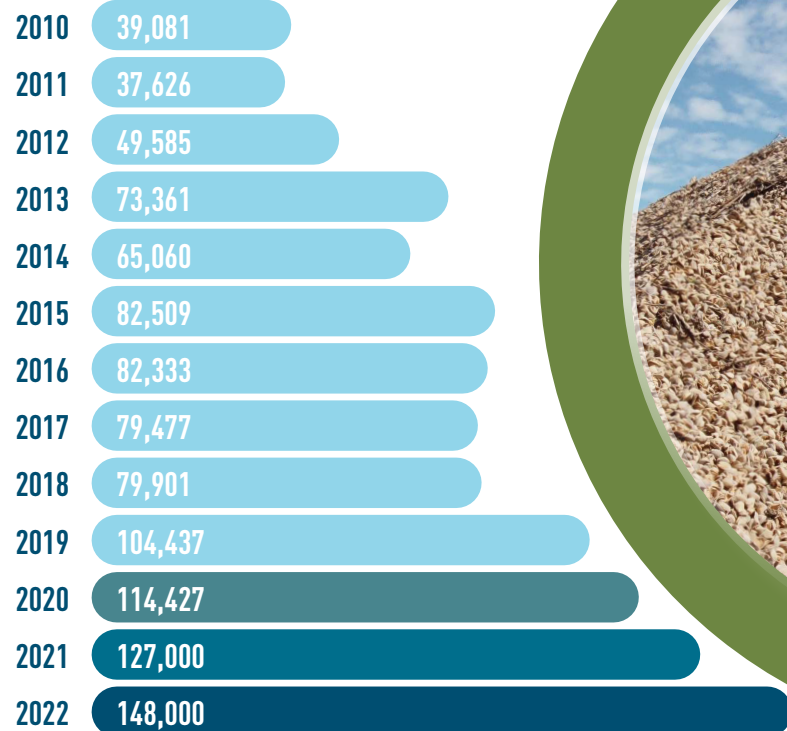
Approximately 340,000 virus tested buds were delivered by the ABA to nurseries in 2020/2021 for grafting to produce healthy trees.

The commercial life of an almond tree is approximately 30 years, and some orchards are now in a replanting phase and growers are making decisions on a broader range of rootstocks and varieties that are now available from Australian and overseas breeding programs.



## PRODUCTION

### ALMOND PRODUCTION PAST & PRESENT (KERNEL TONNES)

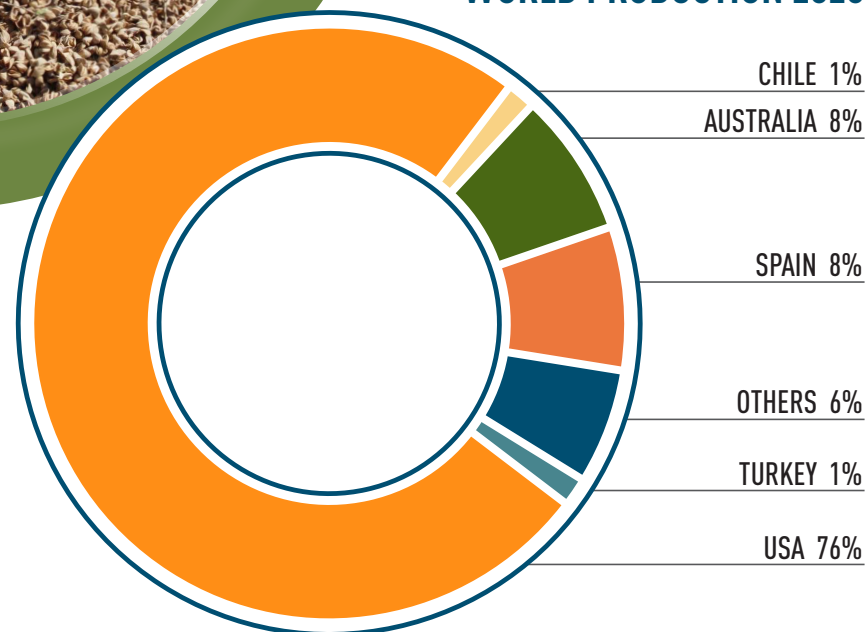


### 2020 PRODUCTION BY STATE (TONNES)

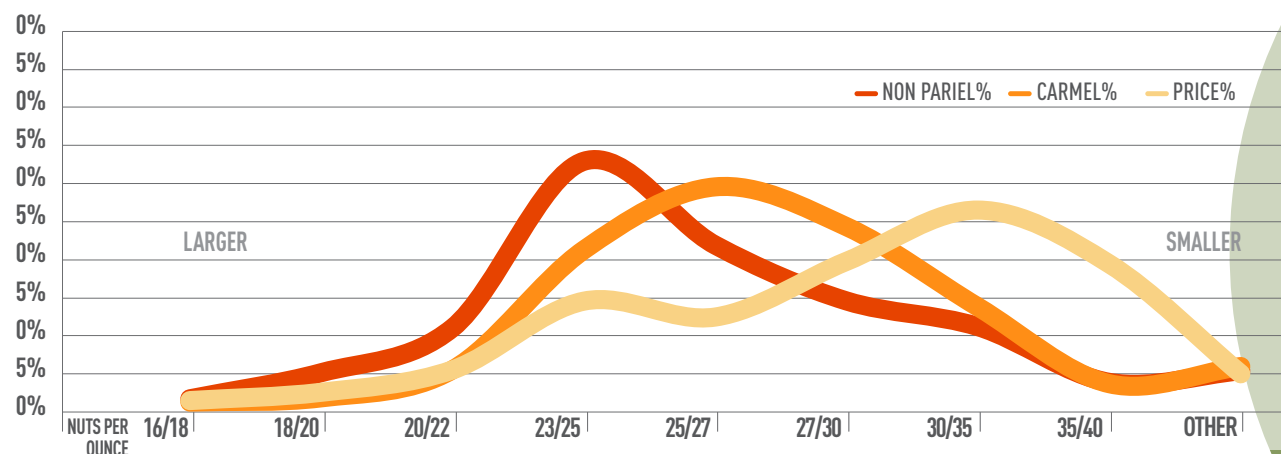


AUSTRALIAN  
2020 TOTAL CROP  
**114,427  
TONNES**

### WORLD PRODUCTION 2020



## 2020 CROP KERNEL SIZE BY VARIETY (KERNELS PER OUNCE)



## CONTRIBUTION TO AUSTRALIAN TREE NUT PRODUCTION % (2020 INSHELL TONNES)

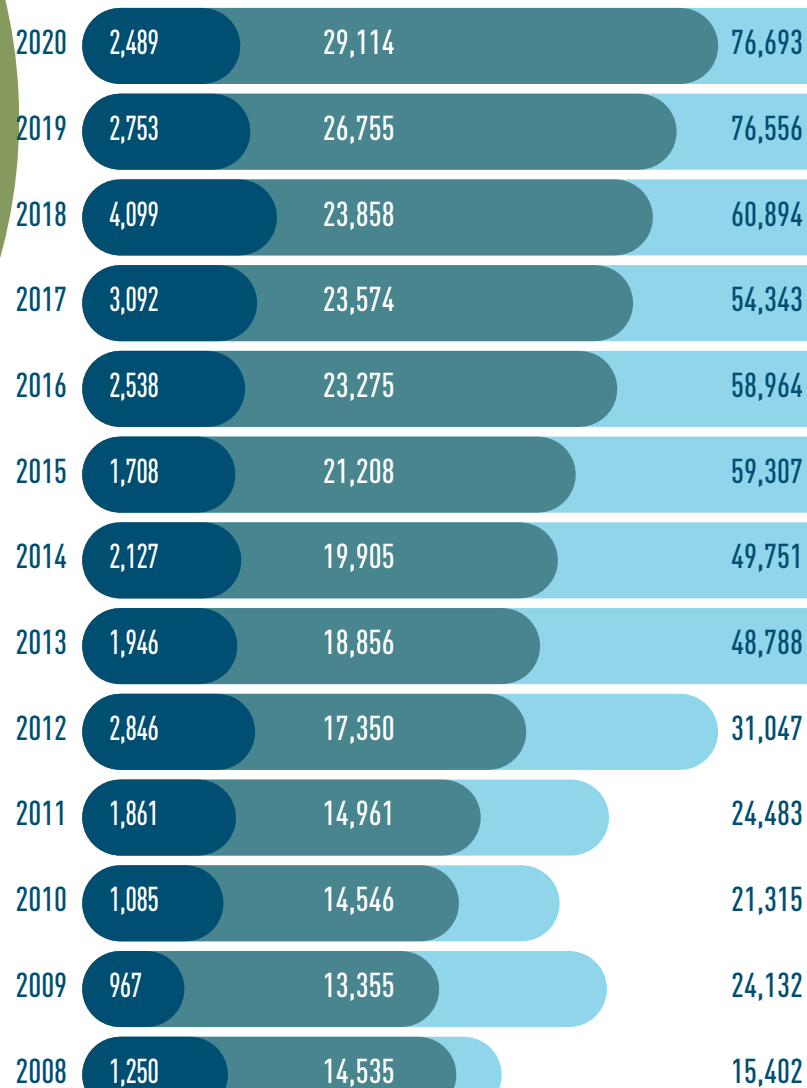


## PRODUCTION BY VARIETY (KERNEL TONNES)

	2010		2011		2012		2013		2014		2015		2016		2017		2018		2019		2020	
VARIETY	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%	TONNES	%
BAXENDALE	160		105		21		118		1,103	2%	97		55		45		27		12			
CAPELLA														1				2		1		
CARINA													1		1		1		29		151	
CARMEL	10,561	27%	14,091	37%	15,718	32%	26,922	37%	19,834	30%	28,495	35%	28,471	35%	27,654	35%	27,172	34%	34,087	33%	36,944	32%
CHELLASTON	15		24		4		18		3		7		2		4		3		4		2	
FRITZ	198	1%	85		108		99		108		87		118		86		57		94		76	
INDEPENDENCE															24		67		422		722	1%
JOHNSTON	24		36		13		31		11		24		11		26		8		18		7	
KEANE	79		65		71		112		103		141		98		162		124		200		142	
MAXIMA															1		2		43		77	
MIRA													1		1		1		7		14	
MISSION	156		146		23		133		43		75		49		31		29		15		7	
MIXED/BROKEN					246		55				2,381	3%	503	1%	1,429	2%	405	1%	1,702	2%	1,563	1%
MONTEREY	181		328	1%	429	1%	689	1%	704	1%	1,146	1%	1,217	1%	1,290	2%	1,682	2%	3,772	4%	7,499	7%
NE PLUS	425	1%	290	1%	276	1%	409	1%	453	1%	278		328		264		263		366		249	
NONPAREIL	21,219	54%	17,154	46%	25,766	52%	36,305	49%	33,772	52%	40,523	49%	39,788	48%	40,120	50%	39,565	50%	51,562	49%	53,048	46%
ORGANIC																						
OTHER	697	2%	321	1%	387	1%	285		825	1%	976	1%	1,042	1%	495	1%	1,669	2%	883	1%	2,972	3%
PEERLESS	747	2%	765	2%	715	1%	949	1%	970	1%	757	1%	777	1%	717	1%	675	1%	985	1%	1,107	1%
PRICE	3,936	10%	4,196	11%	5,796	12%	7,212	10%	7,124	11%	7,506	9%	9,865	12%	7,111	9%	8,145	10%	10,192	10%	9,780	9%
RHEA															1				6		20	
SOMERTON	682	2%	19		12		24		5		16		7		14		8		15		7	
VELA																			20		38	
GRAND TOTAL	39,081	100%	37,626	100%	49,585	100%	73,361	100%	65,060	100%	82,509	100%	82,333	100%	79,477	100%	79,901	100%	104,437	100%	114,426	100%

## SUPPLY AND DEMAND

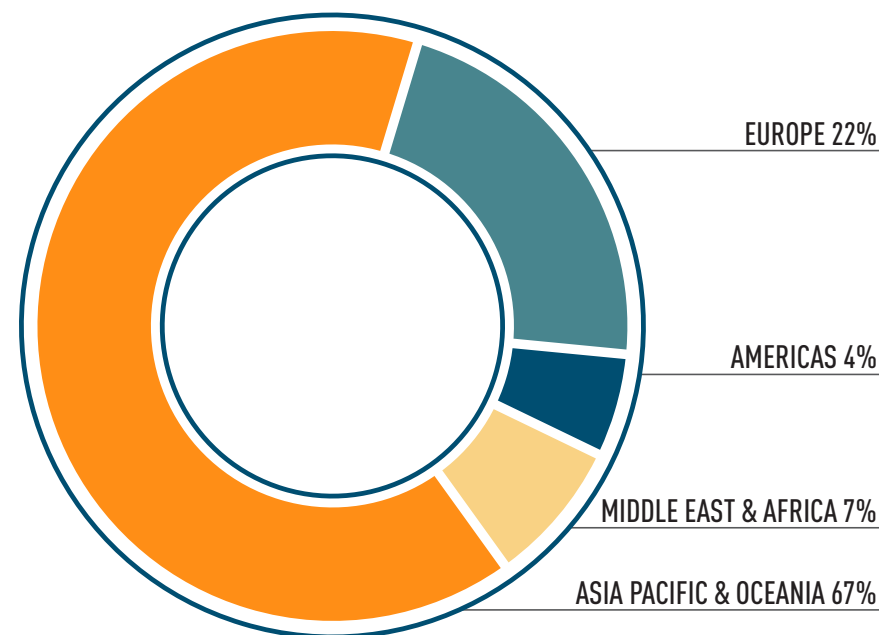
### AUSTRALIAN EXPORT AND DOMESTIC SUPPLY (MARKETING YEAR) KERNEL WEIGHT EQUIVALENT



TOTAL IMPORTS ● DOMESTIC SUPPLY ● TOTAL EXPORTS ●

**2ND** AUSTRALIA IS THE EQUAL  
LARGEST PRODUCER  
OF ALMONDS IN THE  
**WORLD**

### EXPORTS BY REGION (MARKETING YEAR)



# CONSUMPTION

Sales of Australian almonds in 2020-21 were impacted by several key issues: the export trade disruption caused by the COVID-19 pandemic, the significant growth in global supply due to a record Californian almond crop and the pricing pressure that ensued.

The domestic sales of Australian almonds have been calculated at 31,603 tonnes for the 2020-21 marketing year. This comprises 29,114 tonnes of Australian grown almonds and 2,489 tonnes of imported almonds. The average per capita consumption of almonds in 2020-21 is 1.24 kilograms.

Almonds were the most frequently used nut ingredient in new products launched into the Australian food market in the 2020-21 marketing year. Four hundred and two new products with almonds as an ingredient were launched in the 2020-21 year which is a significant increase on the 294 new products featuring almonds in the previous year. The 2020-21 NPDP almond result was also significantly above the next two most popular nut types: peanuts and cashews.



NUT TYPE	2020-21	2019-20
ALMONDS	402	294
CASHEWS	180	140
HAZELNUTS	119	101
MACADAMIA	60	56
PEANUTS	204	194

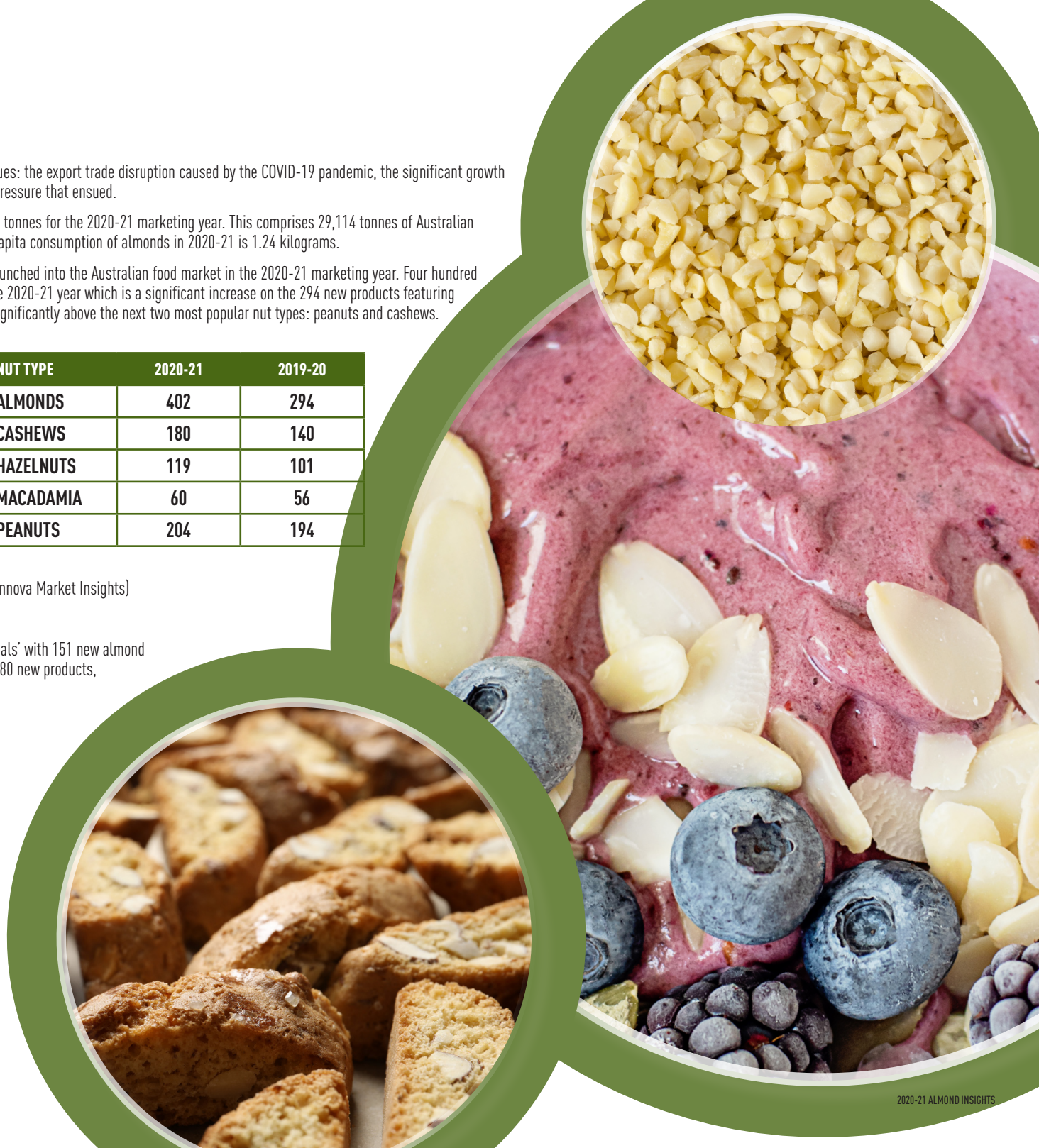
(Innova Market Insights)

The largest product category for new almond products last year was 'Cereals' with 151 new almond inclusions. This category is segmented into 'Cereal and energy bars' with 80 new products, 'Cold cereal' with 64 new products and 'Hot cereal' with 7 new products.

The Innova research also indicates that 385 products featuring almonds contained a health message on-pack. This compares to 377 almond inclusions that communicated a 'convenience' position and 194 products with an 'ethical' message on-pack.

The three key content pillars of the Australian Almonds marketing program are: sustainable farming, health and nutrition, and versatility and food innovation. The last twelve months has seen the continuing rise of sustainability as a major driver for both the industry's trade customers and end consumers.

**AVG AUSTRALIAN CONSUMPTION PER PERSON 1.24KG**



## EXPORTS

**AMERICAS**  
**\$22.6 MILLION**  
**4.1%**

**EUROPE**  
**\$120.9 MILLION**  
**22.2%**

**AFRICA &  
MIDDLE EAST**  
**\$35.3 MILLION**  
**6.5%**

**OCEANIA &  
ASIA PACIFIC**  
**\$366.6 MILLION**  
**67.2%**

The export volume of Australian almonds remained steady against the previous year. The total export sales for 2020-21 were 76,693 tonnes compared to 76,556 tonnes for 2019-20. The trading port shutdowns of the first four months of the COVID-19 pandemic in 2020 were particularly difficult for export sales. Global pricing declined significantly as the market reacted to the increased Californian almond supply.

Californian almond receipts for the May 2021 Year-to-date period are 3.102 billion pounds. This is an increase of 22% over their 2019-20 crop of 2.536 billion pounds. The additional supply is approximately 256,000 tonnes. The low pricing has contributed to the growth in world demand for almonds as the growth in Californian shipments are tracking at 21.4% for the August 2020 to May 2021 period.

From an Australian almond export perspective, sales to India have grown from 8,599 tonnes in 2019-20 to 11,655 tonnes in 2020-21. Conversely, exports to China declined from 39,862 tonnes last year to 26,019 tonnes in 2020-21. The reduced level of Australian almond exports to China was not unexpected as the 2019-20 result was driven by the China-US trade and tariff dispute. The reduction in the retaliatory China-US tariffs combined with lower almond pricing enabled a resumption of trade in Californian product.

Australian almond sales to other key Established Markets grew in the 2020-21 year. Sales to Europe grew by 24% to 17,018 tonnes and by 43% to the Middle East with 4,352 tonnes.

While face-to-face export trade promotions were not possible last year due to COVID-19 travel restrictions, a range of new online communication options were developed and utilised. These included a virtual trade exhibition platform and the use of webinars and video conferences. A special online trade mission to India was conducted in November 2020. The feature was a webinar that provided an Industry Update and Q&A with the Australian almond exporters as well as an interview with the Australian cricket captain, Tim Paine.



# WORLD EXPORT DESTINATIONS 2020-21 MARKETING YEAR

		INSHELL (TONNES)		INSHELL (\$AUD)		KERNEL (TONNES)		KERNEL (\$AUD)		TOTAL KWE (TONNES)	TOTAL KWE (\$AUD)	% CHANGE FROM PREVIOUS MT	
ASIA PACIFIC	NORTH EAST ASIA	CHINA (EXCLUDES SARS AND TAIWAN)	14,222	\$	81,779,473	16,063	\$	128,373,746	26,019	\$	210,153,219	119%	
		HONG KONG (SAR OF CHINA)		\$	7,278		\$	12,813		\$	20,091	100%	
		JAPAN		\$		315	\$	3,277,200	315	\$	3,277,200	62%	
		TOTAL NORTH EAST ASIA	14,222	\$	81,786,751	16,379	\$	131,663,759	26,335	\$	213,450,510	103%	
	SOUTH EAST ASIA	BRUNEI DARUSSALAM				0.4	\$	16,302	0.4	\$	16,302	70%	
		INDONESIA				269	\$	1,891,598	269	\$	1,891,598	4%	
		MALAYSIA					\$	222		\$	222	100%	
		PHILIPPINES				89	\$	978,873	89	\$	978,873	20%	
		SINGAPORE				255	\$	2,319,328	255	\$	2,319,328	9%	
		THAILAND				1,142	\$	9,777,244	1,142	\$	9,777,244	1%	
		VIETNAM	44	\$	244,560	6,586	\$	34,983,245	6,617	\$	35,227,805	26%	
		TOTAL SOUTHEAST ASIA	44	\$	244,560	8,342	\$	49,966,812	8,373	\$	50,211,372	22%	
	SOUTH/CENTRAL ASIA	INDIA	16,650	\$	74,763,019		\$		11,655	\$	74,763,019	23%	
		PAKISTAN	87	\$	278,805	413	\$	3,179,592	474	\$	3,458,397		
		TOTAL SOUTH/CENTRAL ASIA	16,815	\$	75,148,119	428	\$	3,200,719	12,198	\$	78,348,838	20%	
	AUSTRALASIA /OCEANIA	FIJI				12	\$	120,753	12	\$	120,753	64%	
		NEW ZEALAND	1	\$	10,884	2,611	\$	24,447,246	2,611	\$	24,458,130	49%	
		PAPUA NEW GUINEA			\$	245		\$		\$	245	97%	
		TOTAL AUSTRALASIA/OCEANIA	1	\$	11,129	2,622	\$	24,567,999	2,623	\$	24,579,128	49%	
TOTAL ASIA PACIFIC			31,082	\$	157,190,559	27,771	\$	209,399,289	49,528	\$	366,589,848	22%	
EUROPE	WESTERN EUROPE	BELGIUM				233	\$	1,703,276	233	\$	1,703,276	4%	
		DENMARK (INCLUDES GREENLAND AND FAROE ISLANDS)				1,337	\$	9,428,781	1,337	\$	9,428,781	50%	
		FRANCE (INCLUDES ANDORRA AND MONACO)				702	\$	4,675,494	702	\$	4,675,494	33%	
		GERMANY	60	\$	327,945	5,633	\$	44,752,816	5,675	\$	45,080,761	56%	
		GREECE				108	\$	710,543	108	\$	710,543	37%	
		ITALY (INCLUDES HOLY SEE AND SAN MARINO)				274	\$	1,738,758	274	\$	1,738,758	68%	
		NETHERLANDS				3,884	\$	26,194,289	3,884	\$	26,194,289	232%	
		NEW CALEDONIA				3.4	\$	47,617	3.4	\$	47,617	1162%	
		SPAIN				3,270	\$	19,271,853	3,270	\$	19,271,853	16%	
		SWEDEN				75	\$	615,247	75	\$	615,247	25%	
		SWITZERLAND (INCLUDES LIECHTENSTEIN)				146	\$	1,477,767	146	\$	1,477,767	50%	
		UNITED KINGDOM, CHANNEL ISLANDS AND ISLE OF MAN, NFD				828	\$	6,182,846	828	\$	6,182,846	28%	
		TOTAL WESTERN EUROPE	60	\$	327,945	16,508	\$	116,889,051	16,550	\$	117,216,996	23%	
	CENTRAL & EASTERN EUROPE	BULGARIA				69	\$	736,541	69	\$	736,541	322%	
		CROATIA				20	\$	188,670	20	\$	188,670	79%	
		POLAND	22	\$	169,675	364	\$	2,519,368	379	\$	2,689,043	20%	
TOTAL CENTRAL & EASTERN EUROPE		22	\$	169,675	453	\$	3,444,579	468	\$	3,614,254	25%		
TOTAL EUROPE			82	\$	497,620	16,961	\$	120,333,630	17,018	\$	120,831,250	21%	
AFRICA & MIDDLE EAST	MIDDLE EAST	JORDAN				55	\$	397,704	55	\$	397,704		
		KUWAIT	1	\$	8,920		\$		1	\$	8,920	99%	
		LEBANON			\$	203	95	\$	604,718	95	\$	604,921	1%
		QATAR	1	\$	14,448	346	\$	2,423,125	347	\$	2,437,573	138%	
		SAUDI ARABIA	1	\$	4,000		\$			\$	4,000	100%	
		TURKEY	131	\$	429,987	1,451	\$	11,983,875	1,542	\$	12,413,862	72%	
		UNITED ARAB EMIRATES	87	\$	296,299	2,251	\$	15,377,203	2,312	\$	15,673,502	113%	
		TOTAL MIDDLE EAST	221	\$	753,857	4,198	\$	30,786,625	4,352	\$	31,540,482	34%	
	NORTH AFRICA	ALGERIA				80	\$	502,710	80	\$	502,710	54%	
		EGYPT				36	\$	310,139	36	\$	310,139	75%	
		LIBYA				18	\$	134,957	18	\$	134,957	91%	
		TOTAL NORTH AFRICA				135	\$	947,806	135	\$	947,806	68%	
	SUB SAHARAN AFRICA	SOUTH AFRICA		\$	349	400	\$	2,829,676	400	\$	2,830,025	46%	
		TOTAL SUB SAHARAN AFRICA		\$	754,206	400	\$	2,829,676	400	\$	2,830,025	40%	
TOTAL AFRICA & MIDDLE EAST			221	\$	754,206	4,733	\$	34,564,107	4,887	\$	35,318,313	24%	
AMERICAS	LATIN AMERICA & CARIBBEAN	ARGENTINA	10	\$	78,162	767	\$	5,445,399	774	\$	5,523,561	197%	
		BRAZIL				18	\$	114,268	18	\$	114,268	51%	
		ECUADOR				91	\$	507,903	91	\$	507,903	355%	
		URUGUAY				17	\$	105,487	17	\$	105,487		
		TOTAL LATIN AMERICA/CARRIBBEAN	10	\$	78,162	911	\$	6,293,460	919	\$	6,371,622	189%	
	NORTH AMERICA	CANADA				4	\$	74,277	4	\$	74,277	2%	
		TOTAL NORTH AMERICA				4	\$	74,277	4	\$	74,277	2%	
UNITED STATES	UNITED STATES OF AMERICA	10	\$	12,634	4,329	\$	16,126,756	4,336	\$	16,139,390	119%		
	TOTAL UNITED STATES	10	\$	12,634	4,329	\$	16,126,756	4,336	\$	16,139,390	119%		
TOTAL AMERICAS			20	\$	90,796	5,245	\$	22,494,493	5,259	\$	22,585,289	129%	

# GLOBAL

## USA PRODUCTION

While Australian almonds are typically harvested during the months of February to April each year, harvesting of northern hemisphere almonds typically occurs between August to October. Californian almond shipments (sales) for each crop marketing year are recorded from August through to July each year. California grows nearly all the almonds produced in the US. The production from their 2020 harvest is 1,381,700 tonnes. This represents an increase of more than 20% over the previous year.

It is important to note that because of the increased supply, global demand has grown significantly during the 2020-21 Californian marketing year. For the period from August 2020 to May 2021, shipments of Californian almonds have grown by 21.4%.

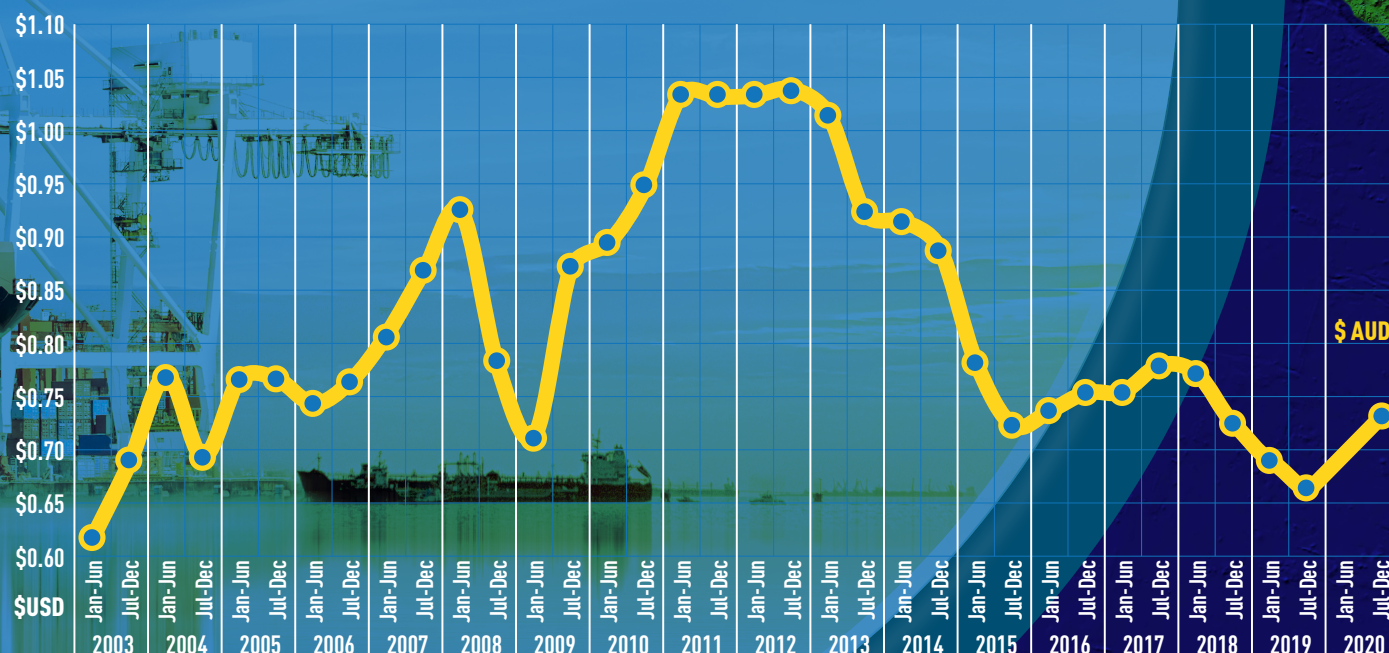
## SPANISH PRODUCTION

Spain is Europe's largest almond producer with 2020 production at 115,600 tonnes being slightly larger than Australia's. The Spanish industry produces from large areas of non irrigated orchards as well as an increasing area of irrigated trees. The varieties grown in Spain are different to those planted in California and Australia and have a harder shell and a darker coloured kernel.

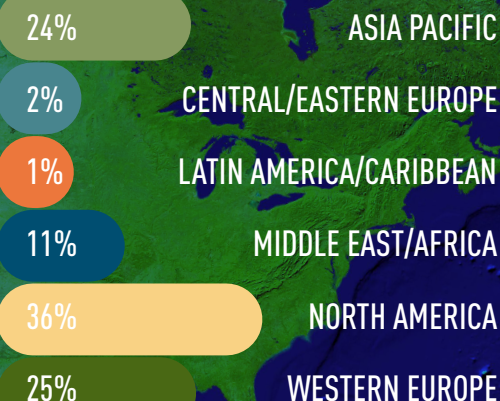
## COMPARATIVE \$AUD VS \$USD EXCHANGE RATES

As the US industry sells 80% of the world's almonds the global price is quoted in US dollars per pound. The return for Australian almonds in our local currency is heavily influenced by the prevailing exchange rate between the Australian dollar and the US dollar.

During the 2020-21 Australian almond marketing year, the value of the Australian dollar has risen against the US currency. This currency movement, while having a positive impact on the cost of imported inputs such as fertilizer and orchard machinery, has a negative impact on the value returned from Australian almond sales.



## US SHIPMENTS BY REGION



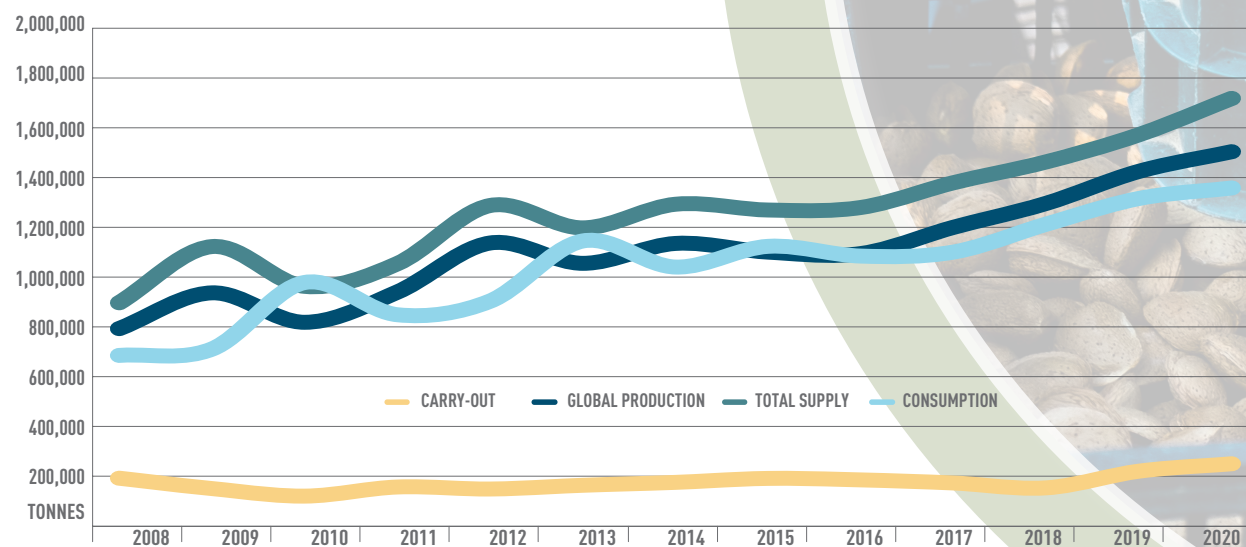
## US NEW PLANTINGS & TOTAL HECTARES

YEAR	NEW PLANTINGS	TOTAL HECTARES
2009	12,397	339,936
2010	11,108	346,006
2011	12,386	354,100
2012	10,924	376,358
2013	11,861	404,686
2014	13,784	445,154
2015	16,011	481,576
2016	13,651	513,951
2017	12,391	550,372
2018	8,354	562,513
2019	6,849	569,362
2020	14,208	583,570
*2021	14,293	597,863

## GLOBAL GLOBAL ALMOND PRODUCTION (KERNEL)

COUNTRY	2014		2015		2016		2017		2018		2019		2020	
	LBS (MILL)	TONNES	LBS (MILL)	TONNES	LBS (MILL)	TONNES	LBS (MILL)	TONNES	LBS (MILL)	TONNES	LBS (MILL)	TONNES	LBS (MILL)	TONNES
CHILE	22.0	10,000	28.7	13,000	26.5	12,000	30.9	14,000	24.0	10,894	21.2	9,596	23.1	10,500
GREECE	11.0	5,000	8.8	4,000	16.5	7,500	6.6	3,000	19.8	9,000	8.8	4,000	15.4	7,000
IRAN	33.1	15,000	33.1	15,000	33.1	15,000	33.1	15,000	33.1	15,000	33.1	15,000	36.6	16,600
ITALY	19.8	9,000	16.5	7,500	16.5	7,500	16.5	7,500	22.1	10,000	39.7	18,000	22.0	10,000
MOROCCO	19.8	9,000	24.3	11,000	24.3	11,000	24.3	11,000	30.9	14,000	28.7	13,000	30.9	14,000
OTHER	66.1	30,000	66.1	30,000	66.1	30,000	66.1	30,000	66.1	30,000	66.1	30,000	66.1	30,000
SPAIN	133.9	60,750	145.4	65,957	101.1	45,866	117.1	53,119	165.4	75,000	172.2	78,089	254.9	115,633
TUNISIA	30.9	14,000	33.1	15,000	33.1	15,000	33.1	15,000	35.3	16,000	26.5	12,000	35.3	16,000
TURKEY	22.0	10,000	28.7	13,000	28.7	13,000	17.6	8,000	37.5	17,000	44.1	20,000	44.1	20,000
<b>TOTAL</b>	<b>358.8</b>	<b>162,750</b>	<b>384.6</b>	<b>174,457</b>	<b>345.8</b>	<b>156,866</b>	<b>345.3</b>	<b>156,619</b>	<b>434.1</b>	<b>196,894</b>	<b>440.2</b>	<b>199,685</b>	<b>528.5</b>	<b>239,733</b>
UNITED STATES	2,010.0	911,721	1,868.0	847,311	1,894.4	859,285	2,136.0	968,873	2,260.0	1,025,119	2,485.7	1,127,507	2,551.0	1,157,114
AUSTRALIA	143.4	65,060	181.9	82,509	181.5	82,333	175.2	79,477	176.2	79,901	230.2	104,437	252.3	114,426
<b>TOTAL</b>	<b>2,512.2</b>	<b>1,139,530</b>	<b>2,434.5</b>	<b>1,104,277</b>	<b>2,421.7</b>	<b>1,098,485</b>	<b>2,656.5</b>	<b>1,204,969</b>	<b>2,870.2</b>	<b>1,301,914</b>	<b>3,156.2</b>	<b>1,431,633</b>	<b>3,331.8</b>	<b>1,511,274</b>

## WORLD ALMOND SUPPLY VS DEMAND



## ALMOND MARKETERS

2020 GLOBAL PRODUCTION  
**1.5**  
MILLION TONNES



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