



ALMOND BOARD
OF AUSTRALIA



Australian Almond Industry

*Mr Tim Jackson, Chief Executive Officer
Almond Board of Australia*

Snapshot

2023 crop down 30% or 47,000 tonnes

Poor weather

Terrible pollination

Flooding impact water quality

Biggest shortfall in industry's history

Global prices low and flat

Cost of production high increased

Uncertainty over water security due to buyback plans

Our key issues:

- Cost of production
- Low returns
- On-farm storage and drying
- Chemical toolkit
- Pollination
- Water surety
- Processing capacity
- Disease pressures
- Pest pressures
- Labour – skilled and unskilled
- Sustainability verification
- Growing in Riverina v Rest of Industry

On the horizon:

1. Interstate movement – Varroa not over
2. Biosecurity charges to growers
3. Murray Darling Basin Plan – reduced volume available
4. Barmah Choke – water availability in summer
5. Bumper crops next year
6. Plant based innovation

In a nutshell

Australian almond industry plantings

2000-01: 3,500 ha

2022-23: 62,412 ha - LandIQ

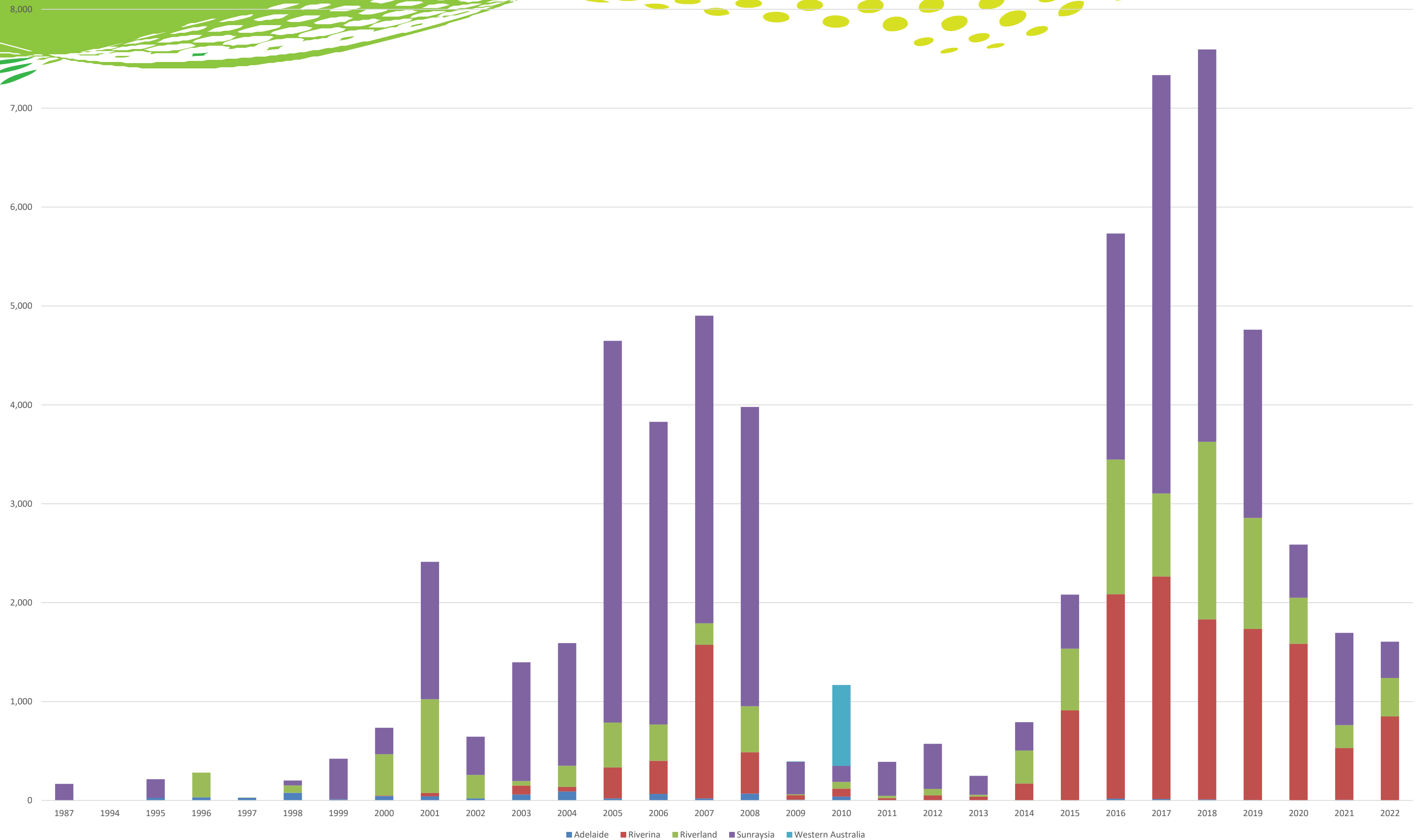
2026-27: 70,000 ha?

Riverina

Goulburn Valley

Riverland and WA

Land IQ plantings data: All regions



Recent plantings by ha per region

<i>Region</i>	<i>2015</i>	<i>2016</i>	<i>2017</i>	<i>2018</i>	<i>2019</i>	<i>2020</i>	<i>2021</i>	<i>2022</i>	<i>Grand Total</i>
Adelaide	2	19	14	10	5	1	6	0	715
Riverina	910	2,067	2,251	1,820	1,729	1,584	523	849	14,938
Riverland	623	1,361	838	1,796	1,124	465	232	389	11,039
Sunraysia	546	2,286	4,231	3,968	1,904	538	934	367	34,897
WA	0	0	0	0	0	0	0	0	822
Grand Total	2,081	5,732	7,334	7,594	4,761	2,588	1,695	1,605	62,412
%	3.3%	9.2%	11.8%	12.2%	7.6%	4.1%	2.7%	2.6%	

40.8% of total plantings



Growing Regions

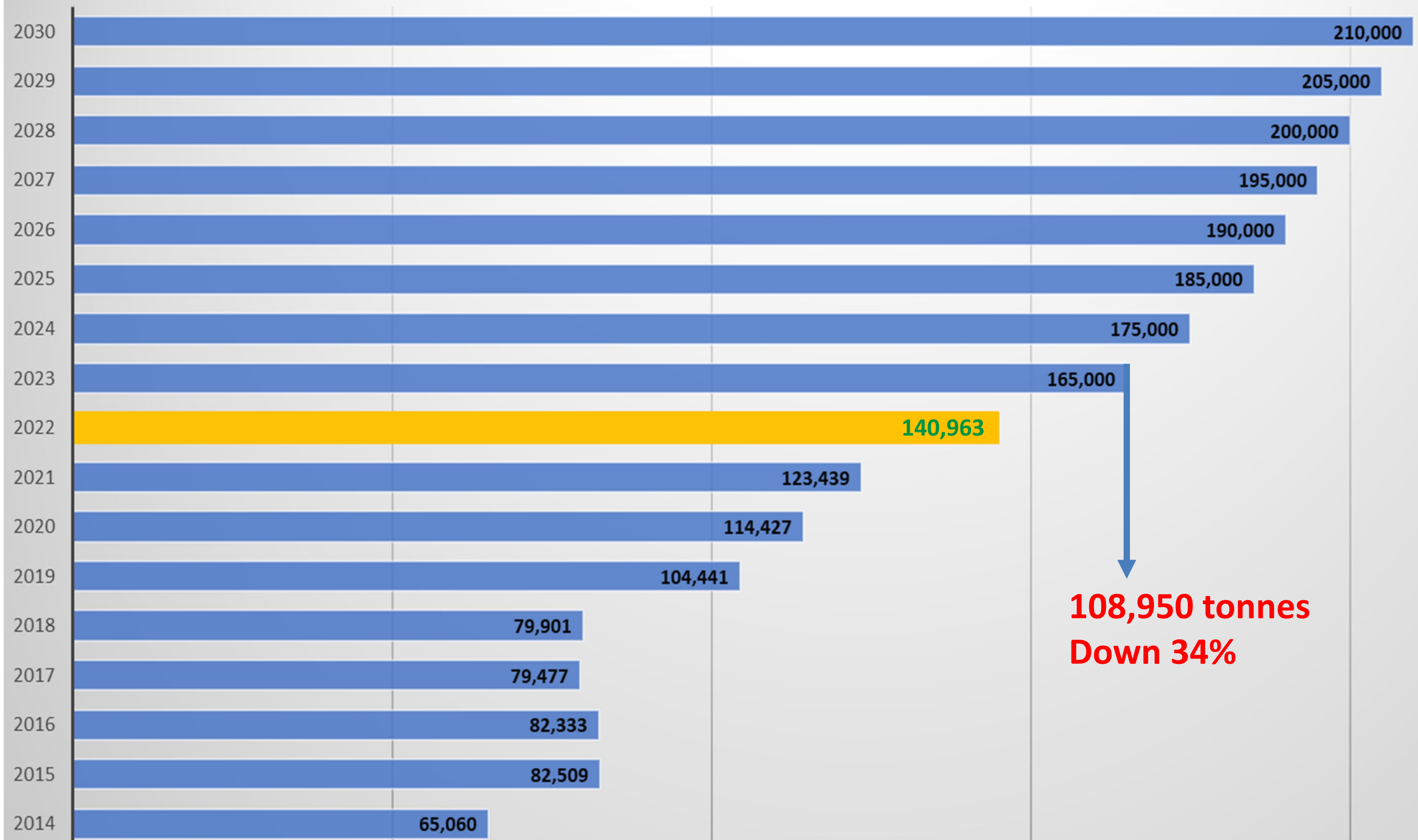
- Two thirds of Australian almond properties are 100 hectares or less.

Major planting regions

- Riverland, South Australia 19%
- Sunraysia, Victoria 56%
- Riverina, New South Wales 25%



Australian almond production tonnage

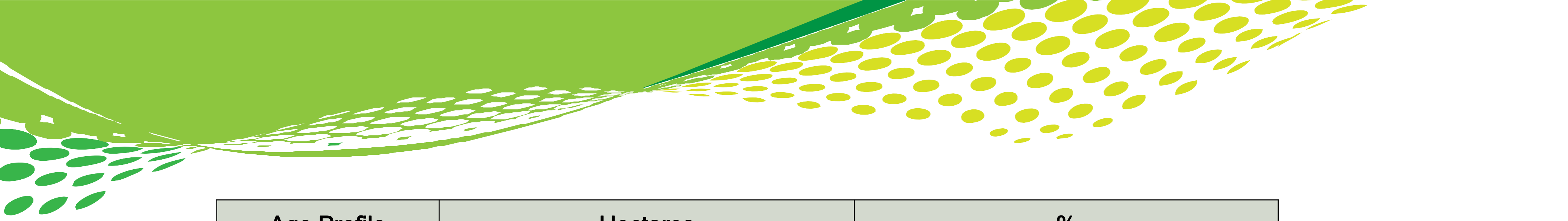


**108,950 tonnes
Down 34%**

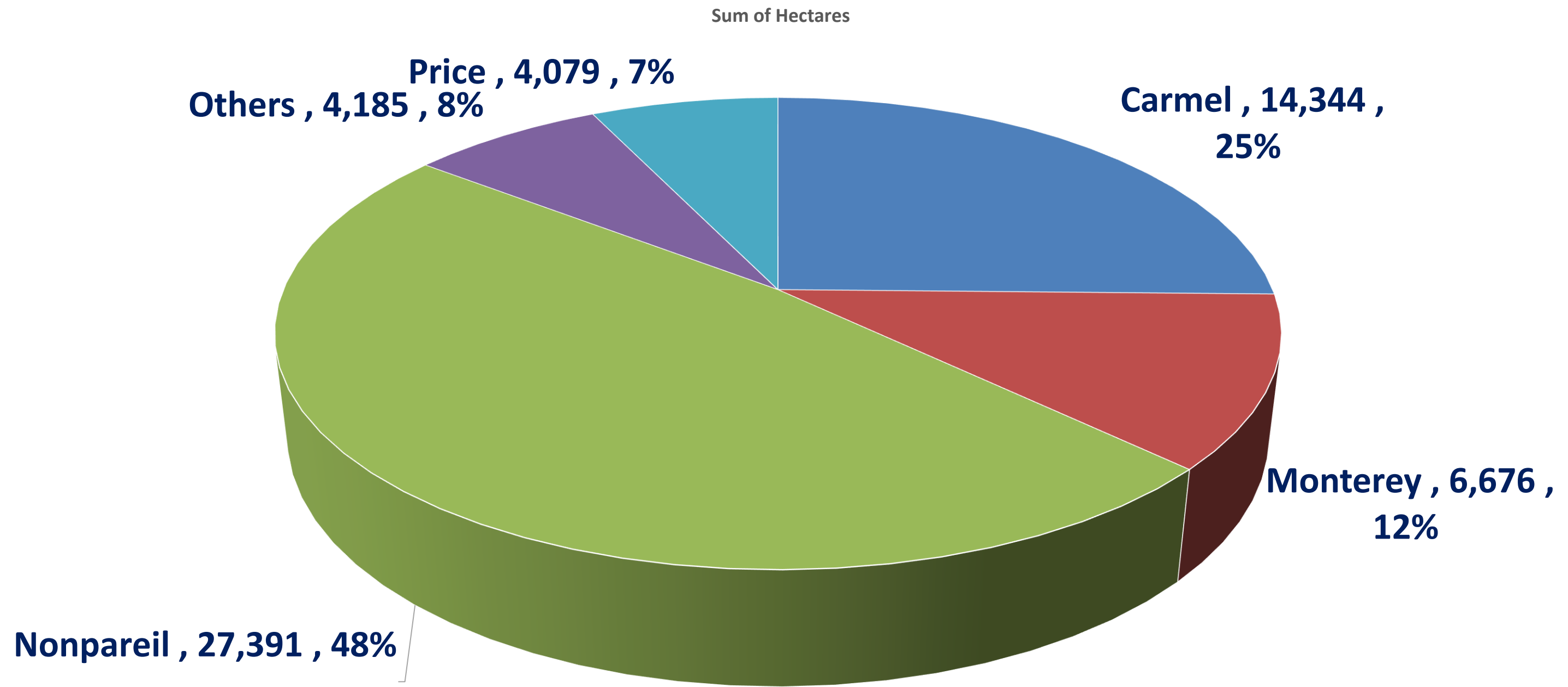
Production forecast by region

Forecast tonnage by region	
Adelaide	2,000
Riverina	48,000
Riverland	35,200
Sunraysia	112,000
Western Australia	2,000
Grand Total existing plantings	199,200
<i>Plus known potential extras</i>	
Riverland	8,000
Riverina	6,400
Goulburn Valley	6,400
Estimate by 2032	220,000

* Tonnage based on industry average of 3.2mt

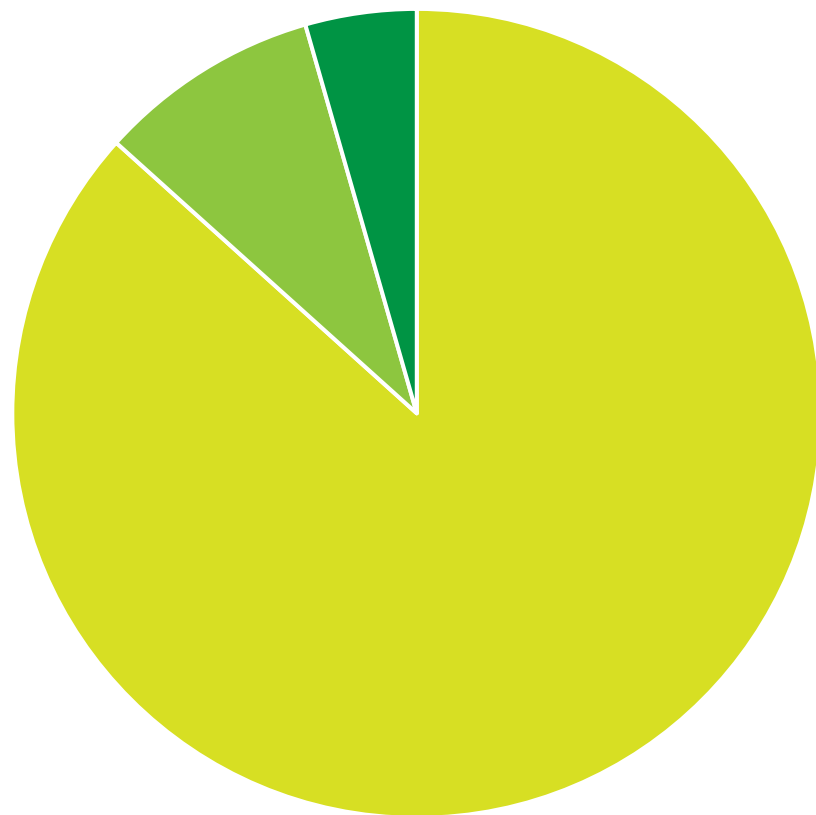


<u>Age Profile</u>	<u>Hectares</u>	<u>%</u>
1-3 Years	5,888.69	9%
4-10 Years	28,543.28	46%
11-20 Years	22,868.50	37%
21-25 Years	4,417.69	7%
>25 Years	695.53	1%
TOTAL	62,413.69	100%



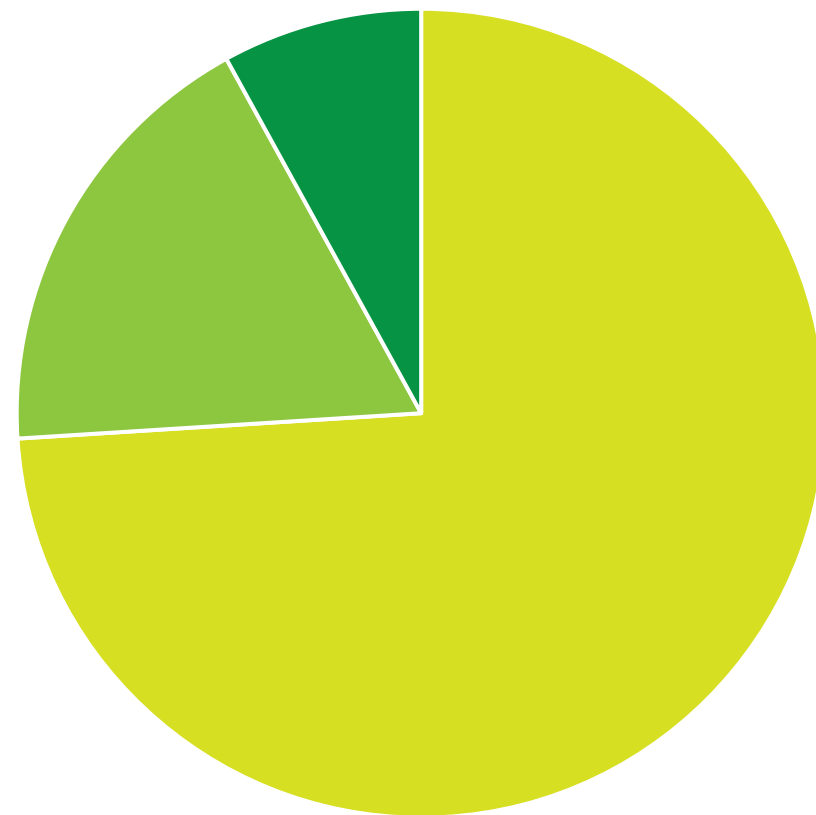
Industry Plantings

Global Almond Production



■ California 78% ■ Australia 8% ■ Spain 4%

Australian Nut Industry



■ Almonds 74% ■ Macadamias 18% ■ Other 8%



Bee requirements

Australian almond orchard bee needs in August:

2000-01: 17,500 hives

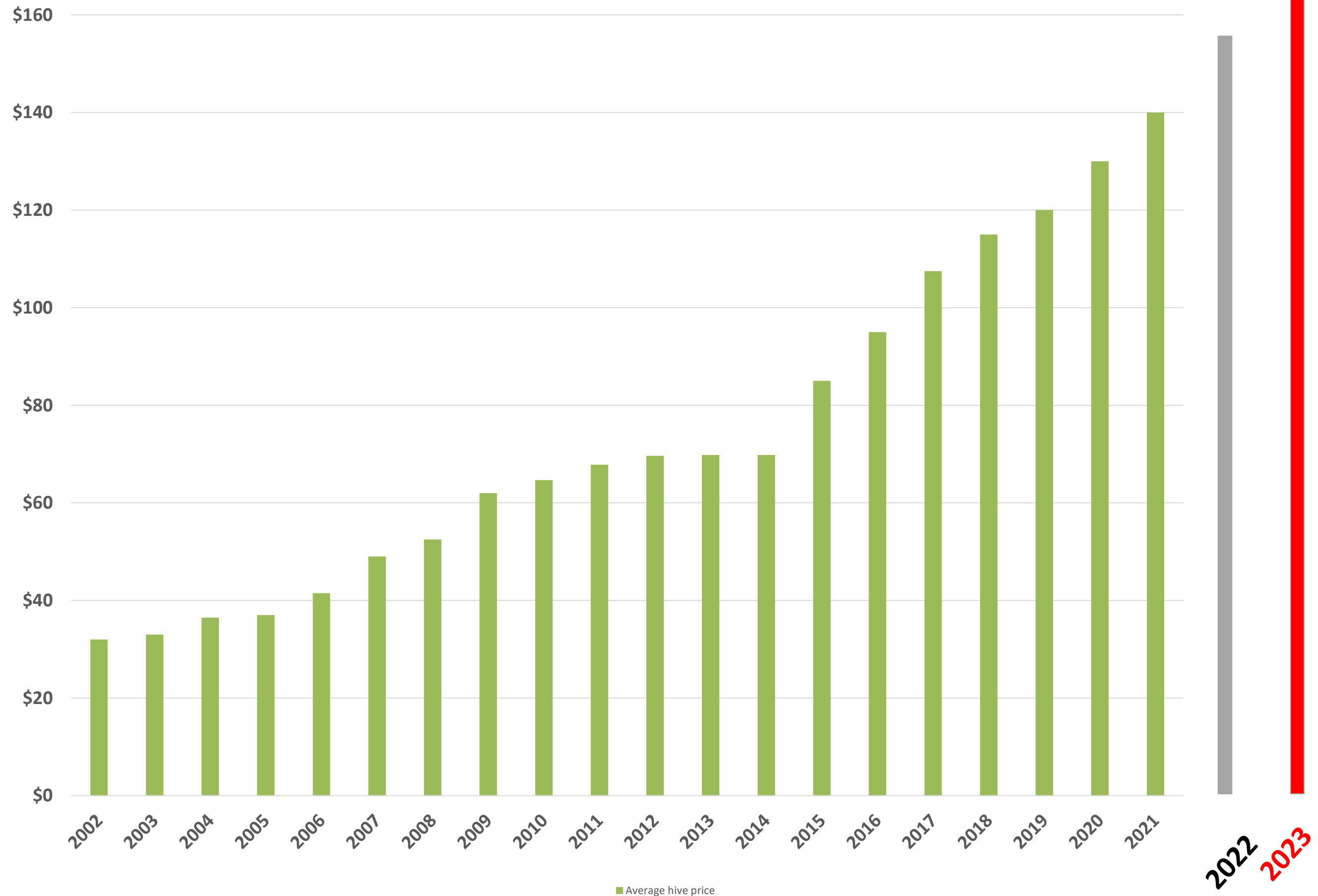
2021-22: 250,000 hives

2026-27? 375,000 hives

Costs

Hive price – 2002 to 2023

Increase in hive price 338%
Average annual increase of 18%



What does the future hold?

- **NSW DPI kudos – Movement permit system, effective zoning**
- **EPPRD signatories**
- **2022 almond pollination at least 80,000 hives short**
- **Re-categorisation approved**
- **Interstate movement harmonized**
- **Eradication v Management**
- **New biosecurity tax– **Equity plea****

Future production in Australia

- Investment in production capacity
- Plantings continuing
- Upgrading technology
- Water availability assured for next season
- Dry weather forecast – El nino
- Blossom in full swing with full beehive stocking rates



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Key dates

ABA Annual General meeting – October 19 9am online

ACE Open Day – November 14

2024 ABA Conference – Adelaide Convention Centre October 2-4

2024 Memberships - open now

China sales growth

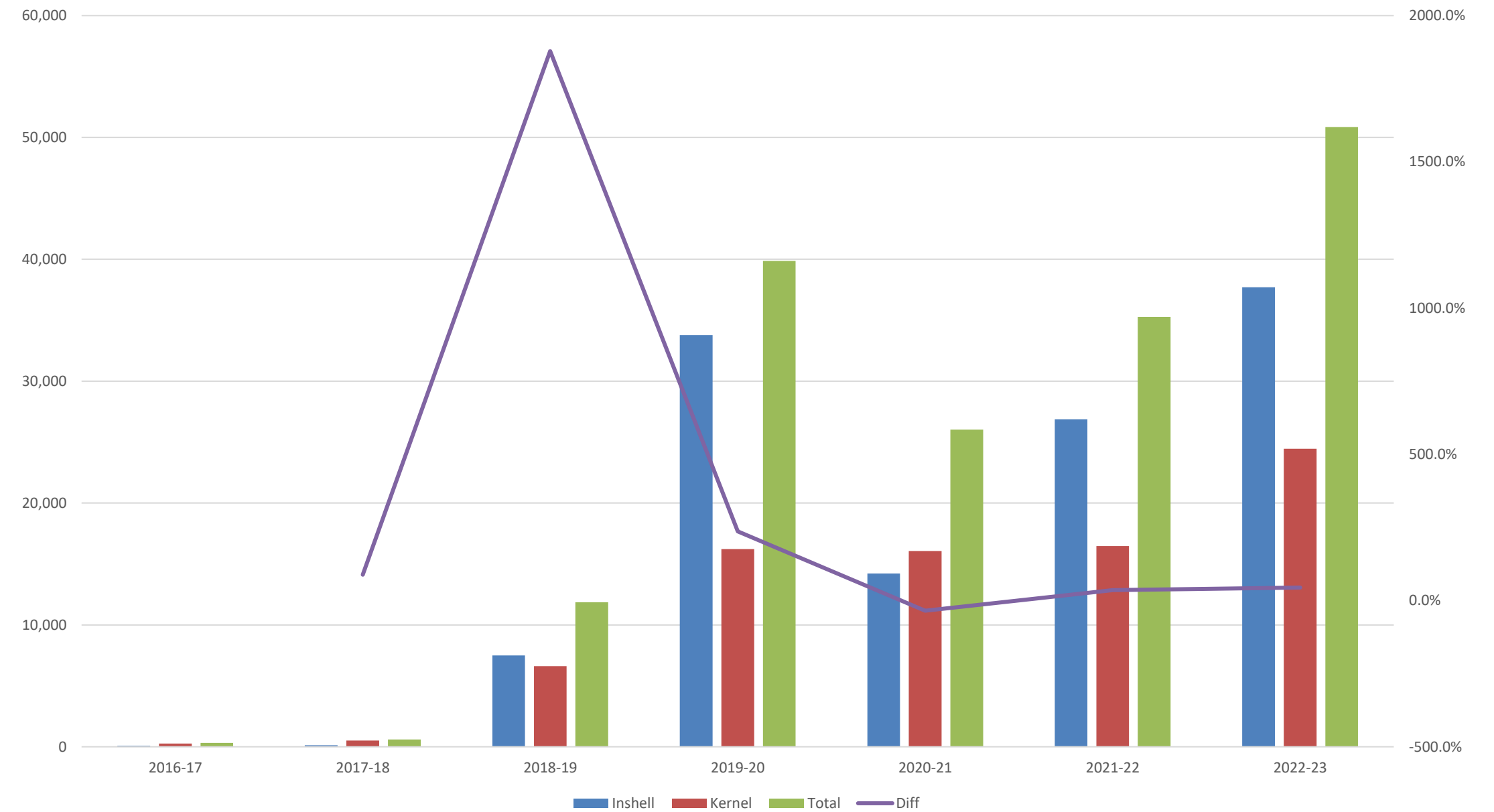
China and Australia formally sign free trade agreement

Deal aims to remove barriers to exports but Australian opposition vows to scrutinise detail on settling disputes



Australian almond sales to China (tonnes)				
	<i>Inshell</i>	<i>Kernel</i>	<i>Total</i>	<i>Diff</i>
2016-17	88	257	319	
2017-18	128	510	600	88.2%
2018-19	7,490	6,617	11,860	1878.0%
2019-20	33,786	16,212	39,862	236.1%
2020-21	14,222	16,063	26,018	-34.7%
2021-22	26,870	16,461	35,270	35.6%
2022-23	37,701	24,457	50,848	44.2%

Australian almonds sales to China (kwe)



Exports 2022-23 season

Record 22-23 season – up 22%

China 48% share

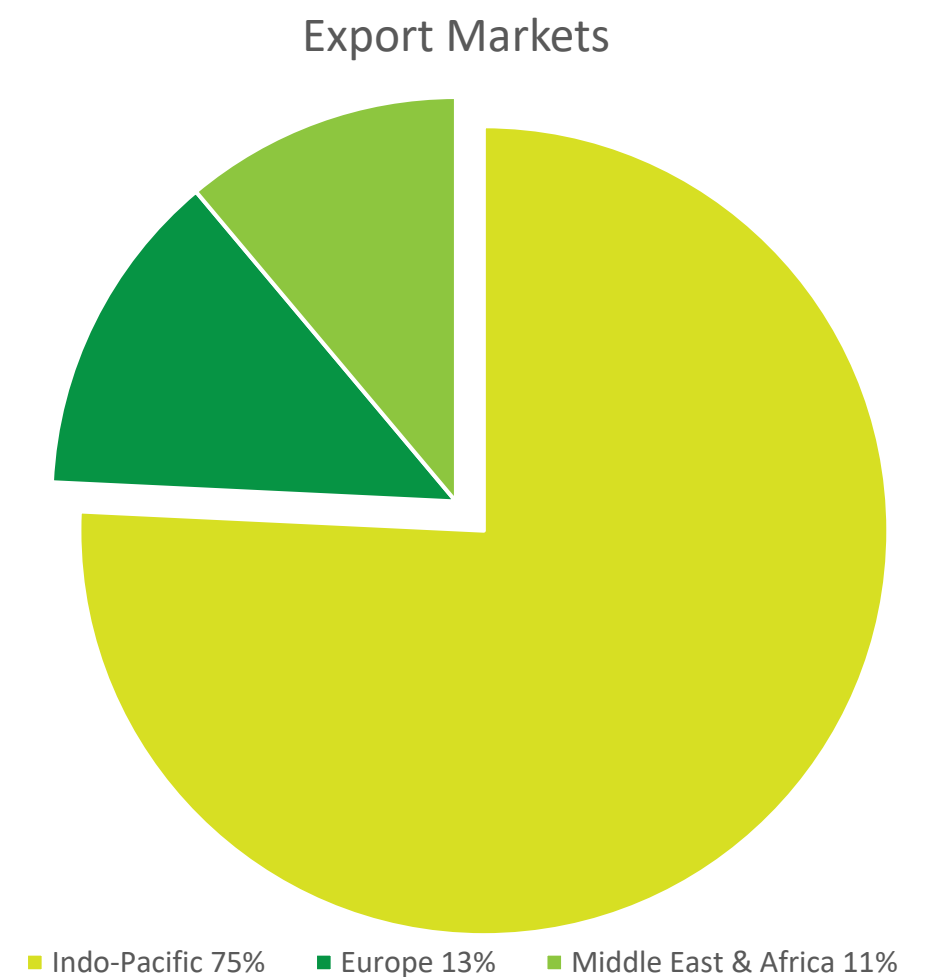
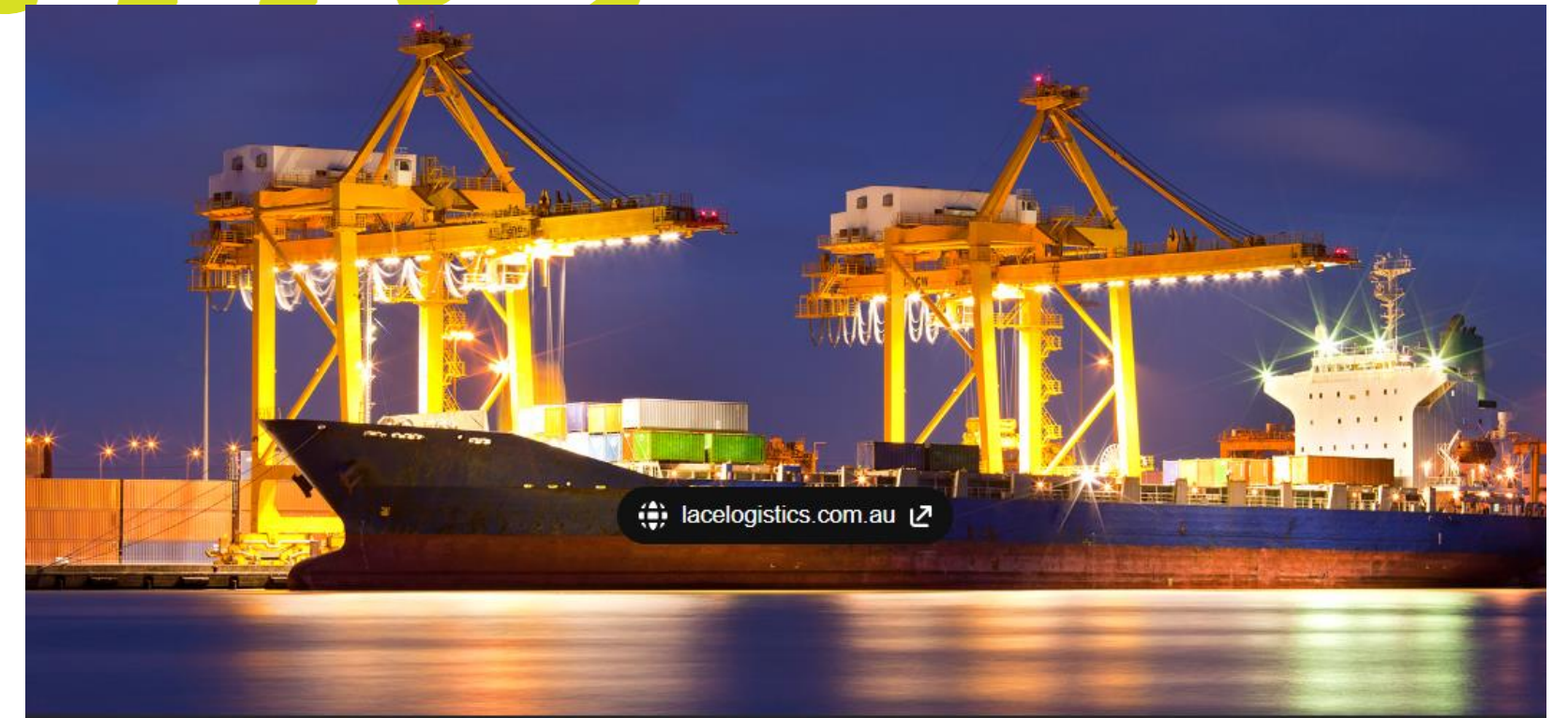
China sales **up 44%** on previous year

China inshell sales 37,701mt (**up 32%**)

China kernel sales 24,457mt (**up 48.5%**)

Inshell sales export share (kwe) = 34%

China inshell sales = 74.4% of all inshell sales



New Indian TRQ

Australia-India Economic Co-operative and Trade Agreement

December 29, 2022





Almond Ashes: 2-2

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**ALMOND BOARD
OF AUSTRALIA**

50% reduction in almond inshell and kernel import duties

Quota of 34,000 tonnes

2023-24 so far

...up 111%

California almond exports to India v Australia exports

	<i>Pounds</i>	<i>Tonnes</i>	<i>Oz</i>	<i>Oz share</i>
2016-17	167,075,494.00	75,784.95	14,771.00	16.31%
2017-18	199,517,359.00	90,500.48	18,194.00	16.74%
2018-19	231,347,488.00	104,938.53	15,154.00	12.62%
2019-20	255,772,032.00	116,017.43	8,598.00	6.90%
2020-21	362,066,700.00	164,232.38	11,655.00	6.63%
2021-22	352,670,244.00	159,970.17	16,710.00	9.46%
2022-23	306,815,967.00	139,170.81	8,236.00	5.59%

6,435.00

Our marketing challenge



 **australian almonds** **\$3.5 million pa**

 **california almonds** **\$100 million pa**

Market Development funding

- Voluntary marketing levy = \$20/tonne
- 20% reserve for company specific marketing activities through Marketing Initiative Program (MIP).
- Two streams – market development and direct to consumer.
- Market development leveraged \$1 for \$1 via Hort Innovation through co-funding mechanism Collective Industry Fund.
- ABA secured \$7 million marketing funding package for 2023-2026.

- Industry sustainability framework
- Hort 360
- Social, community and economic contribution
- Proper stewardship of use of the planet and its resources.
- Driving towards Zero Waste.
- Global trend toward compulsory accreditation.
- New certification obligations likely



Health Wellness

- Improve cognitive function
- Improves recovery
- Reduces risk of obesity
- Reduce risk of diabetes
- Improves heart health
- Protein source
- Vitamin E - antioxidants
- Improves skin
- Gluten free
- High in fibre



New generation of almond consumers

