



Tuesday, October 20, 2025

2025 R and D Forum

- Industry update

- *Tim Jackson, CEO
Almond Board of Australia*



australianalmonds.com.au

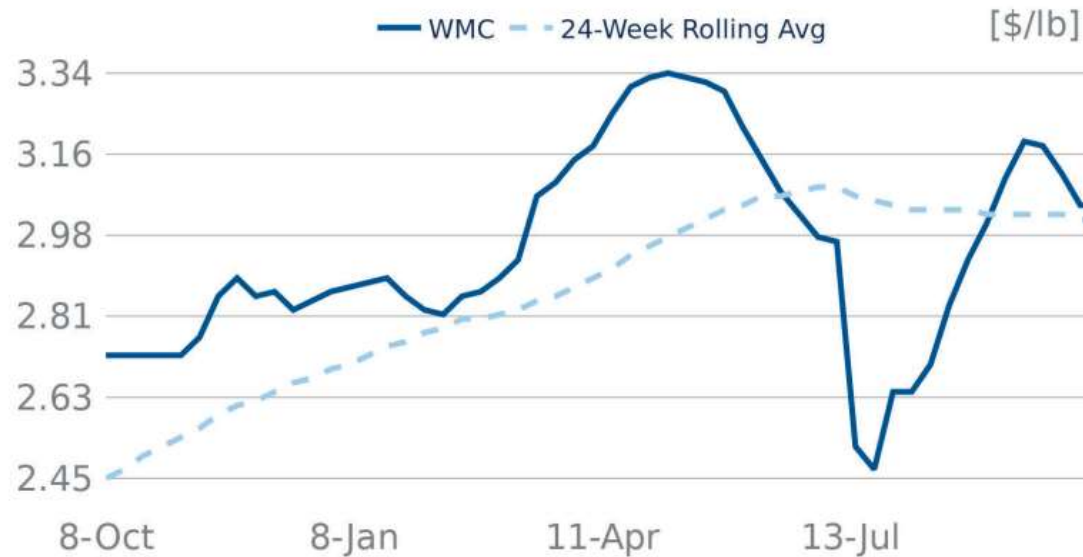
Snapshot

- Aussie almond demand at an all time high
- Pre-crop estimate of **155,531 tonnes** (**2024 = 163,181 tonnes**)
- Varroa mite takes hold
- Carpophilus beetle
- Monterey leaf failure widespread, yields impacted (*10% of plantings*)
- *Chemical tool kit*
- Hort360 – Accountability becomes real. Measure to manage
- Leadership focus
- Biosecurity threats keep coming

Strong market recovery

Rebound from Objective Estimate collapse

STRATAMARKETS INDEX PRICES, FAS CA, \$/LB



NPK INDEX - PK INDEX SPREAD | FAS CA



Global pricing, low USD rate

COMPARATIVE \$AUD VS \$USD EXCHANGE RATES & AUD/KG

As the Californian industry sells almost 75% of the world's almonds, the global price is quoted in US dollars per pound. The return for the Australian almonds in our local currency is heavily influenced by the prevailing exchange rate between the Australian dollar and the US dollar. A strong Australian dollar delivers lower returns while a comparatively weaker Australian dollar delivers better returns once the US dollar price is converted. During 2024-25, the Australian dollar remained stable in the mid to low US\$0.60s which was the lowest average in many years. It should be noted that with farm inputs sourced from overseas such as fertilizer and orchard machinery, the cost of production increased due to a weaker Australian dollar.

US/lb v AUD/kg Pricing Comparison NPX 2010-2025

The chart below plots the US dollar price per pound of Nonpareil Extra No. 1 grade 2010-2025 against the Australian dollar price per kilogram for the same product.



Exports and Demand

- Record 25-26 Aus exports – **up 2%**
- **STD Exports up 3%**
- China sales **up 6%** on previous year
- China 57% share of exports - **up from 53%**
- **Heightened interest** due to trade sanctions
- **Enhanced value proposition** against land cost
- **Global market uncertainty continues**
- **Demand, sales up in India (12%), Turkiye (31%)**



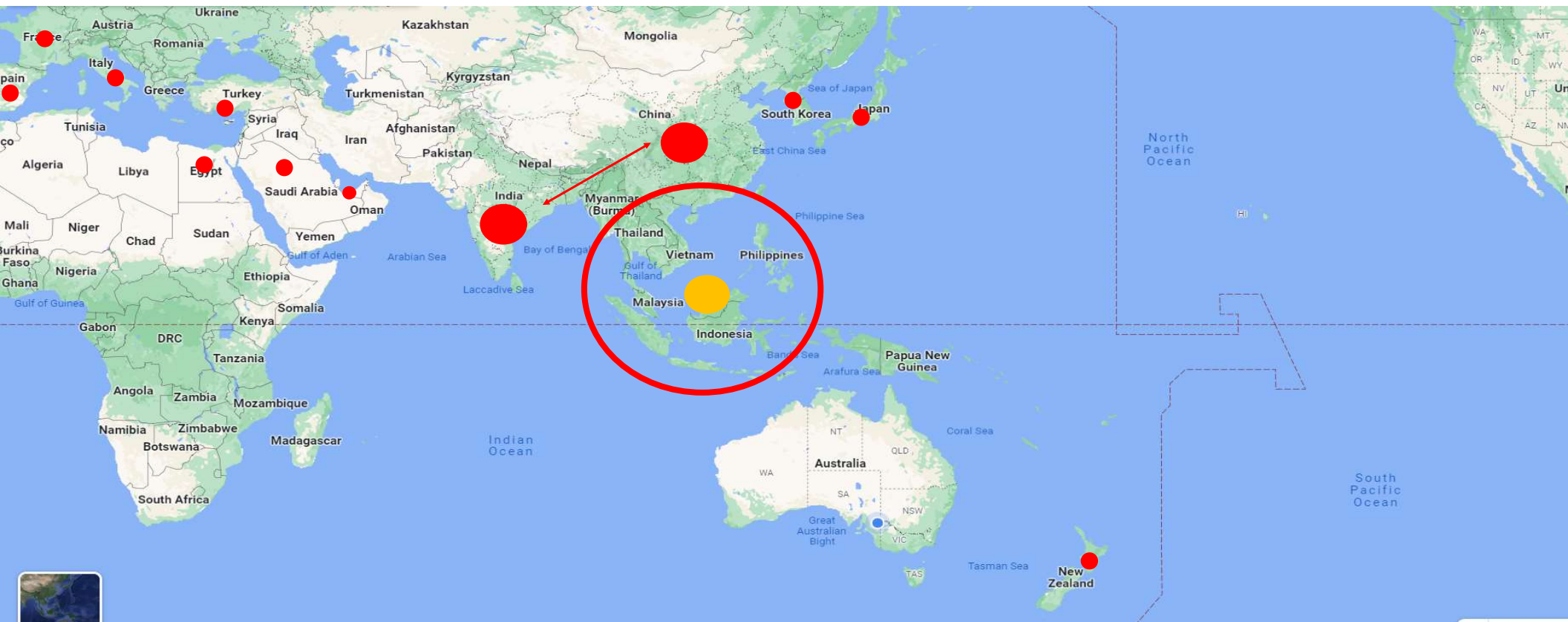
Ambassadors (+ Murray the Mascot)

The Australian Almonds Ambassadors will build trust, humanise the product, and extend the brand's reach through authentic, relatable storytelling that connects with diverse audiences.



Marketing

Targeting existing, emerging and new markets



Strategic Focus

KEY MARKETS

● CHINA, INDIA, SE ASIA, AUSTRALIA

OPPORTUNITY

● Growth into SE ASIA

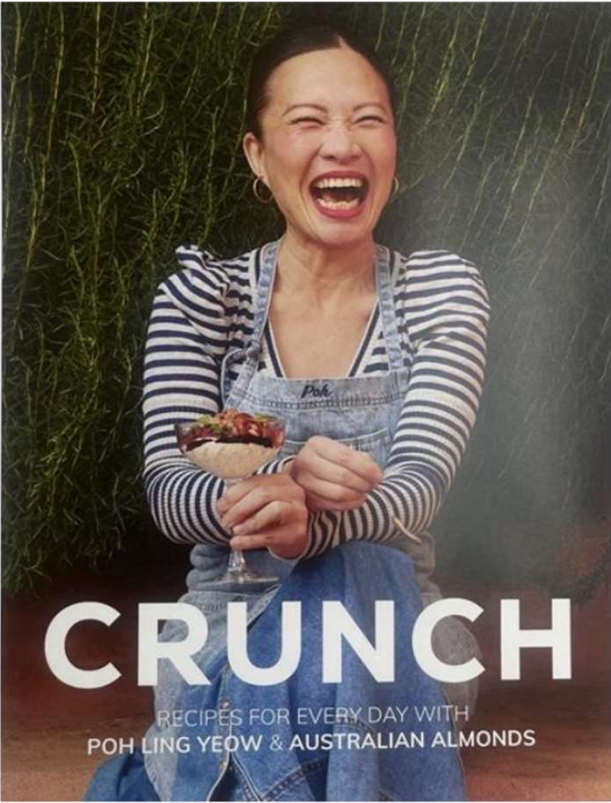
ATTRIBUTION

● 82% Export / 18% Domestic

GROWTH

● Drive premium for Australian Almonds in established markets and educate growth markets on premium position.

Cookbook First Look



ALMOND BOARD
OF AUSTRALIA

International focus



Strategic Planning

ABA Strategic Plan 2022-2025



| | | | | | | |
|-----------------------------|--|--|--|---|--|-----------|
| Vision | Australia's leading and most respected horticultural peak industry body. | | | | | |
| Purpose | Deliver a collective platform to communicate and promote the interests of our members and industry stakeholders. | | | | | |
| Strategic Priorities | ESG | Member Services | People | Market Development | RD&I | |
| | Action towards Zero impacts Water and Crop Optimisation Planet, Resource and Biosecurity Leadership | Knowledge and Education Member Advocacy Industry Resources and Reporting | Zero Harm Workforce Engagement Development and Diversity | Generate Demand International Trade and market access Market Insights and Promotion | Best Management Practice (BMP) Plant improvement Research and innovation funding | |
| Our Values | Leadership | Accountability | Safety | Innovation | Planet + | Team Work |

Almond

STRATEGIC INVESTMENT PLAN 2022-2026

AT A GLANCE

The overarching strategic intent of the almond Strategic Investment Plan (SIP) is to embrace innovation to maintain and strengthen profitable growth in export and domestic markets with sustainable and efficient production and processing of consistent quality almonds.

This abbreviated version of the almond SIP provides details on the outcomes, strategies and key performance indicators for the industry for the 5-year period of the SIP. More information is provided in the SIP full document, which is available at www.horticulture.com.au/almond/.

| OUTCOME | STRATEGIES | KPIs |
|--|--|---|
| Industry supply, production and sustainability | | |
| <p>Outcome 1: The Australian almond industry has increased profitability, efficiency and sustainability through innovative research and development (R&D) focusing on an integrated approach to plant improvement, orchard productivity, soil health, water-use efficiency, pollination, integrated pest and disease management (IPDM) and emerging technologies.</p> | <p>1. Develop and evaluate superior scion varieties and rootstock varieties suitable to current and future climates and production systems (Horizon 2 and Horizon 3), and evaluate superior rootstock varieties and maintain high-health mother trees for varieties.</p> | <ul style="list-style-type: none"> • Demonstration sites with superior scion and rootstock varieties • Availability of new scion varieties suitable for current and future Australian conditions with superior traits • New knowledge on the performance of superior scion and rootstock varieties under Australian conditions • Almond variety true-to-type, high-health mother trees maintained |

Continued >>

Industry feedback

Current ABA Risk Register

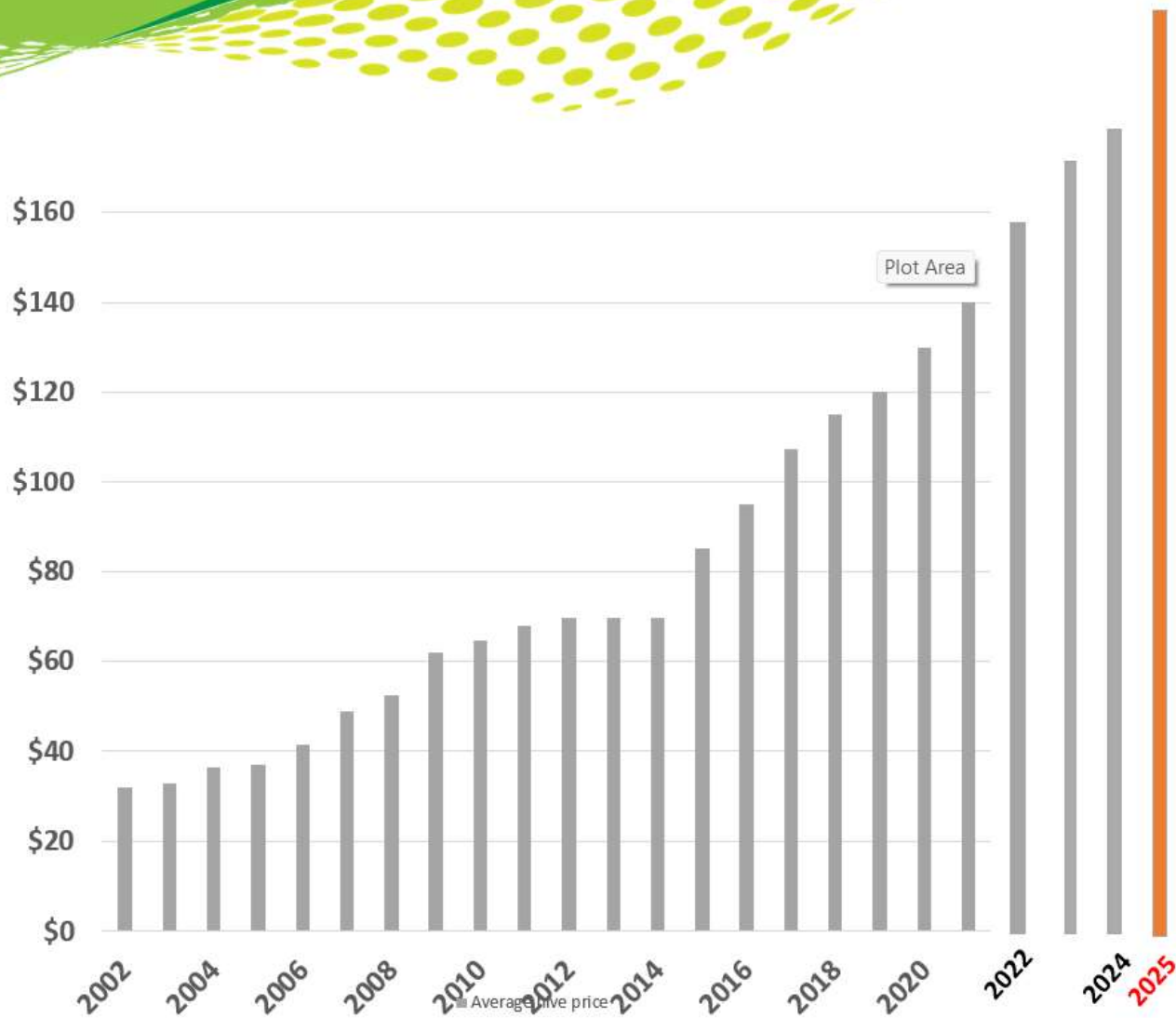
| | | |
|----|---|---|
| 1 | Carpophilus beetle damage | Trapping and chemical solutions |
| 2 | Crop damage due to on-farm storage | New |
| 3 | Hive shortage due to varroa mite – price hike, availability | Self fertile trial, artificial pollination |
| 4 | Monterey leafing failure | New study commissioned in Riverina |
| 5 | Shake and catch technologies | Ongoing |
| 6 | Social licence to grow – Water use | Advocacy investment |
| 7 | Wet harvest (Drying on farm) | Ongoing |
| 8 | Chemical toolkit - reducing | Ag-wide challenge with APMVA |
| 9 | Hull and shell stockpile fires | Ongoing |
| 10 | Biosecurity threats - preparedness | Eg: Brown marmorated stinkbug, Xylella and Khapra Beetle. |

Industry challenges

- **Pollination**
- **Budwood integrity**
- **Viability** – productivity, robotics.
- **Measure to manage** – Hort 360, benchmarking, water use, profitability
- **Attracting skilled and non-skilled labour**
- **Benchmarking**
- **Carmel** – our best producer despite NIBF
- **Replanting decisions**
 - Self fertile
 - Rootstocks
 - Location – climate/soil

Costs

- Hive price – 2002 to 2025



Ongoing issue

2022 arrival of varroa mite impacting beekeeping industry

Increased interest in self fertile varieties

Estimated industry hive requirement: 300,000+ hives

2025 pollination season complete

- **Drought**
- **Varroa impacting hive health**
- **Exiting older beekeepers**
- **SA bee supply in limbo**

Biosecurity threats and costs come into focus

How project are initiated

 **Strategic Investment Advisory Panel**



Almond Industry Advisory Committees (AIACs)

- 1. Pollination
- 2. Water
- 3. Chemistry
- 4. Sustainability
- 5. ACE Orchard
- 9. Market development
- 7. Processing
- 8. Productivity
- 9. Plant improvement

Projects

29 projects ongoing
18 industry specific
11 multi-industry

Delivery partners:

ABA (10 projects)
Plant Food Research
SARDI
Adelaide Uni
Agriculture Victoria

Riverina-centric research key consideration.



R&D projects

Discover Almond levy investments into Almond Fund R&D initiatives

The almond levy has been invested into following Hort Innovation Almond Fund R&D initiatives, together with Australian Government contributions.

Discover the projects that you want to see by refining the list by ongoing, completed, and historical R&D projects as well as projects by R&D portfolio type. You can also filter the projects by areas of extension and communications, international trade, and data and insights.

1-10 of 28 results

Newest - Oldest

Refine project listing

Filter by R&D project status and final report

- Completed project
- Final research report
- Historical document
- Ongoing project



ONGOING PROJECT

Consumer usage and attitude tracking 25/26 (MT24201)

This project is delivering a comprehensive consumer tracking program across the Australian horticulture sector.

18 June 2025

Consumer and market research

In a nutshell

Australian almond industry plantings

2000-01: 3,500 ha

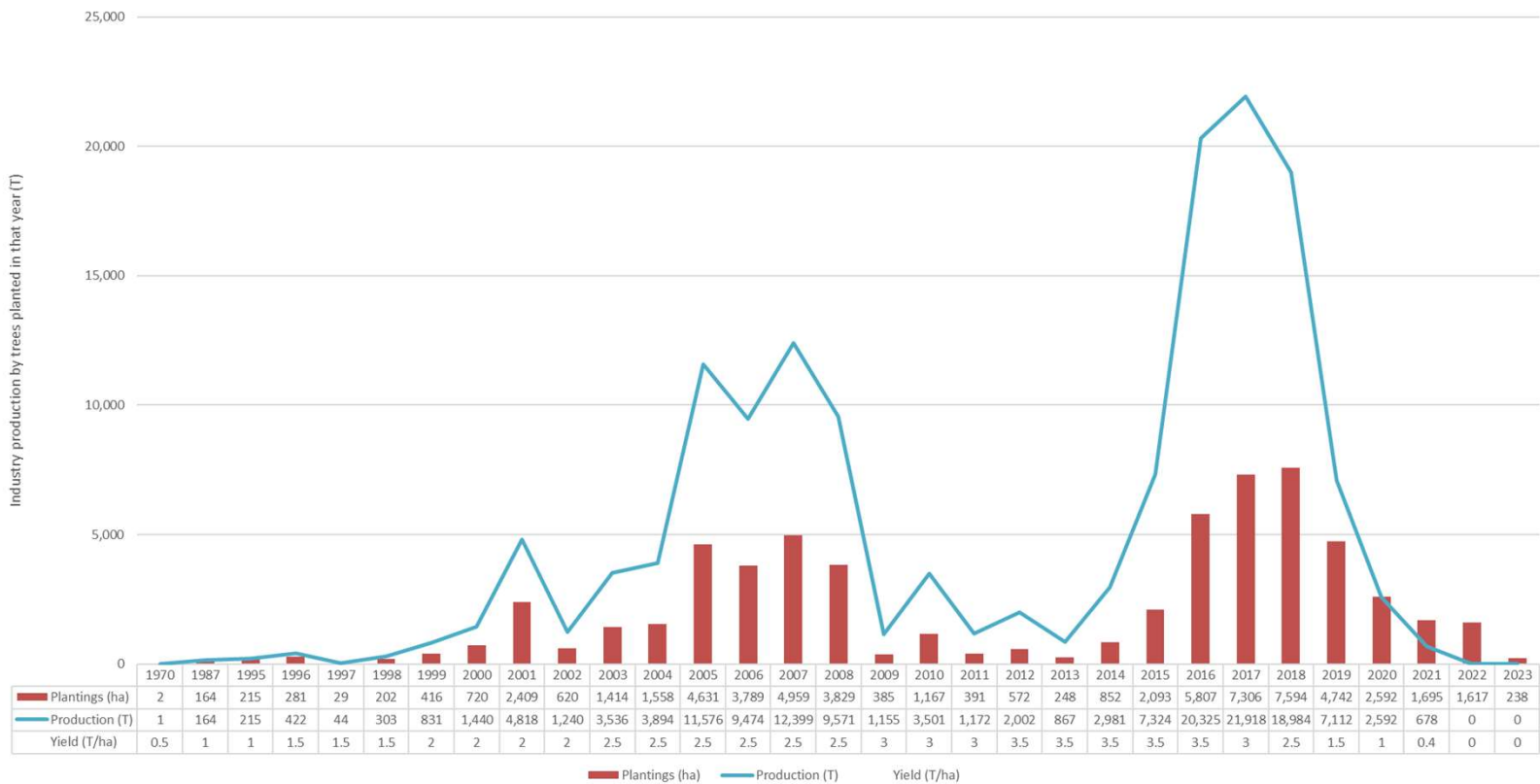
2023-24: 63,462 ha

2024-25: 66,096 ha (new)

Up to 40% of plantings due to be replaced in next 5-7 years
Growth? Renewed interest from winegrape growers

Planting timeline

Production distribution by age



What's next ...

You can't manage what you can't measure

[View in browser](#)

Request for Tender

Hort
Innovation

almond hort³⁶⁰

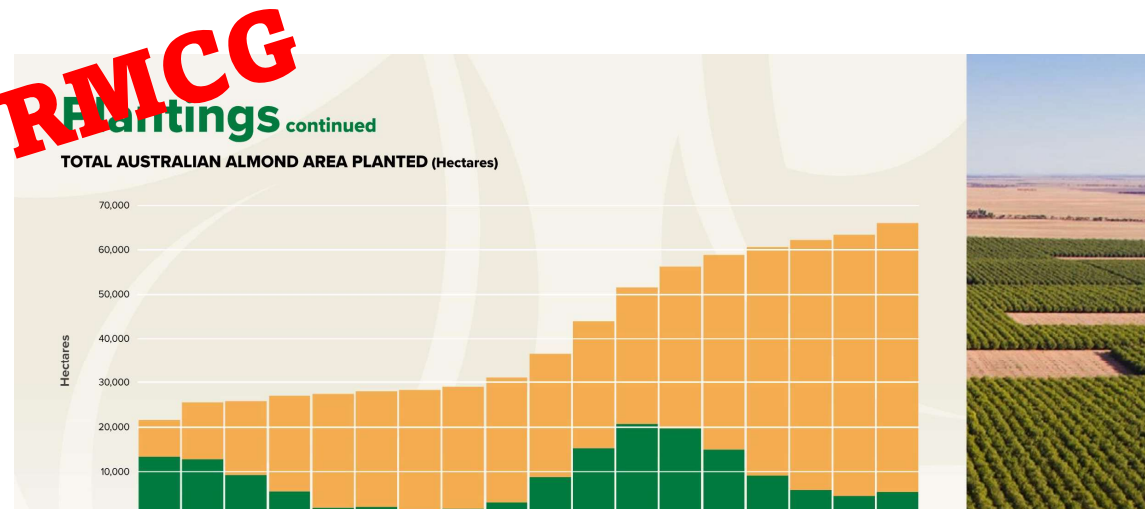
**Request for Proposal: Almond Industry
Statistics and Benchmarking (AL25003)**

Hello Tim

Hort Innovation is seeking a suitably qualified, experienced and capable delivery partner for the project: Almond Industry Statistics and Benchmarking (AL25003).

The objectives of this service being sought are:

- Collection of accurate and robust almond industry data and statistics suitable for industry strategic planning activities and to demonstrate insight to industry
- Enable almond growers and stakeholders to make timely and effective decisions to aid in industry planning and resource prioritisation, providing a supportive operative environment for industry participants
- Facilitate industry sustainability positioning through the continued delivery of environmental sustainability credentials that will, once collected, provide credible industry



Secured: ABA and RMCG



Grower resources



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CONSUMERS



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Almond Centre of Excellence

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Almond growth and development

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Climate and energy

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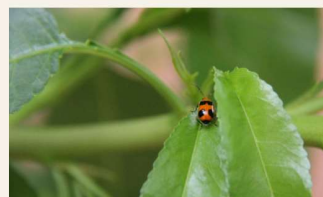
Food quality and safety

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Integrated disease management

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Integrated pest management

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Irrigation

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Pollination

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Soil and nutrition

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Sustainable chemical use

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Varieties and rootstocks

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Almond Centre of Excellence



Grower resources

Almond Fund snapshot

\$6.73 million

Invested in R&D in 2023/24
See the investments

\$3.6 million

Levy collected in 2023/24
See how we manage the fund

Quick links

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Consumer usage and attitude tracking 25/26 (MT24201) [View](#) 
- ONGOING PROJECT
Regulatory support and response co-ordination (pesticides) (MT24008) [View](#) 
- FINAL RESEARCH REPORT
Almond Centre of Excellence experimental and demonstration orchard (AL19000) [View](#) 
- ONGOING PROJECT
Horticulture Impact Assessment Program 2023/24 to 2025/26 (MT24005) [View](#) 
- FINAL RESEARCH REPORT
Regulatory support and coordination (pesticides) (MT20007) [View](#) 

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Grower resources

- Social media – LinkedIn and Facebook
- Website – www.almondboard.org.au
- SMS messaging
- WhatsApp groups
- Almond Bytes
- Grower Notices
- In the Nutshell
- Email







Our Industry

The horticultural unicorn



Thank you

Your ABA team

