

INDUSTRY STATS

Almonds in Australia

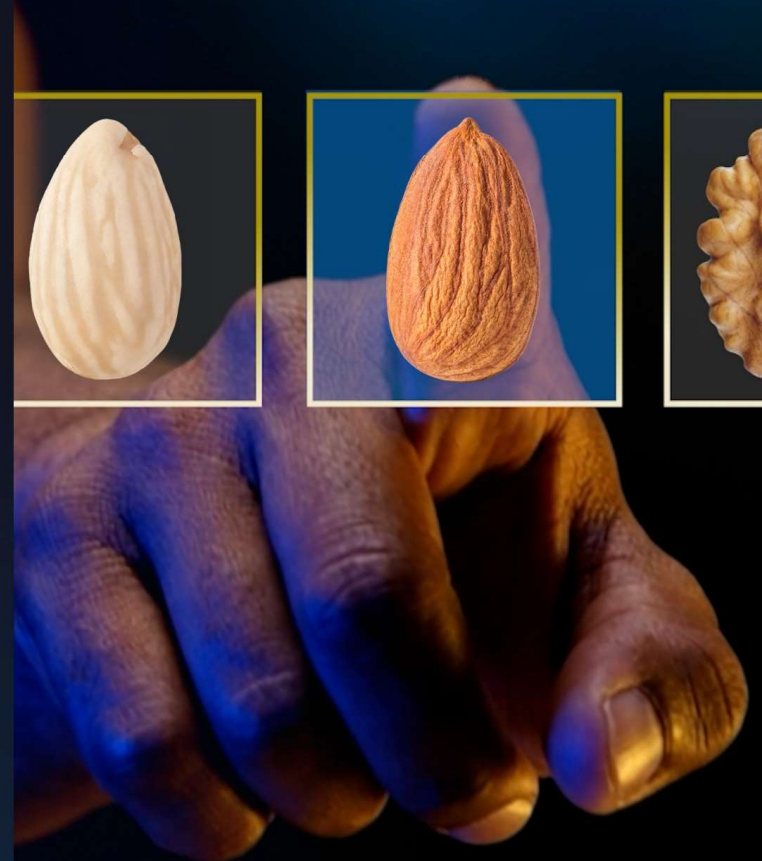
The 2025 season against 2026 year-to-date, read from 151,456 kernel samples across five crop years.

AUTHOR

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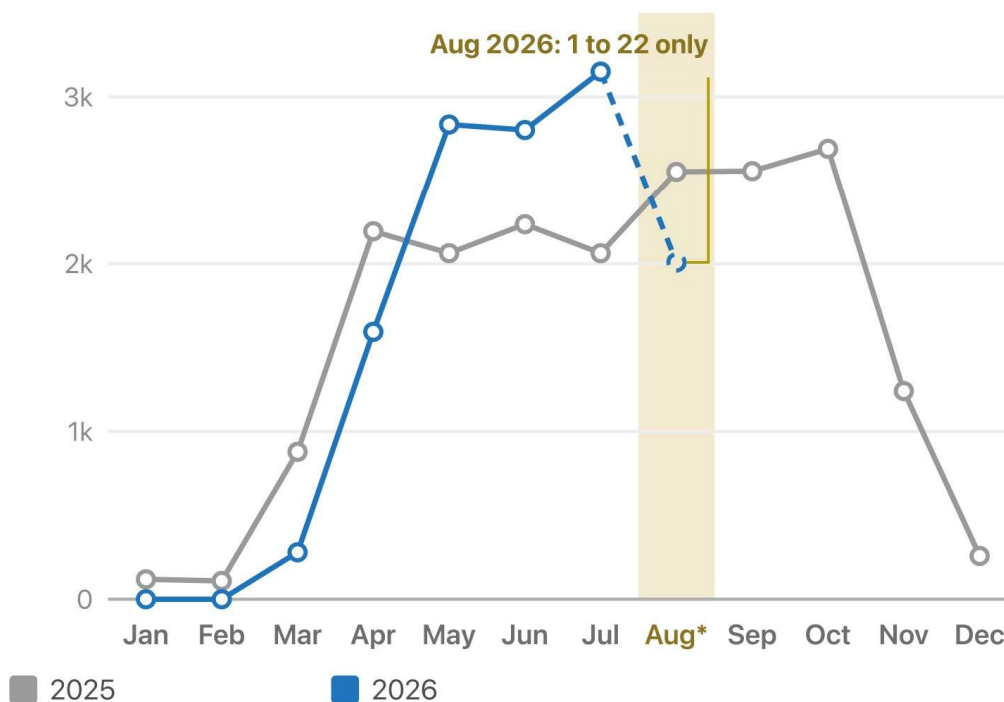
DATA THROUGH

22 August 2026



VOLUME AND SEASON TIMING

2026 started later, then pulled ahead from May



Behind through April

No January or February activity in 2026. March ran 280 against 879, and April 1,594 against 2,194.

Ahead from May onward

May 2,836 against 2,063, June 2,803 against 2,236, July 3,151 against 2,063.

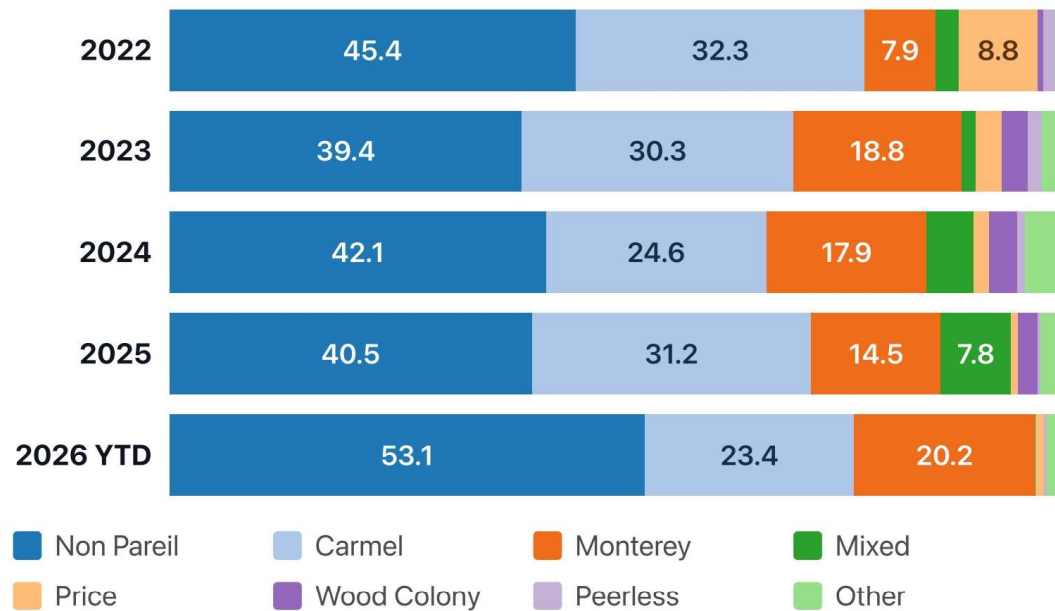
Net effect, plus 9.6%

12,672 samples against 11,565 on the same window. July 2026 is the highest single month recorded.

* August 2026 covers the first 22 days only, so it is not comparable with the full month in 2025. September to December 2026 are still ahead.

VARIETIES

The varietal mix shifted substantially



Non Pareil up 12.6 pp

At 53.1%, this is the only year in the dataset where a single variety exceeds half of all samples.

Monterey up 5.7 pp

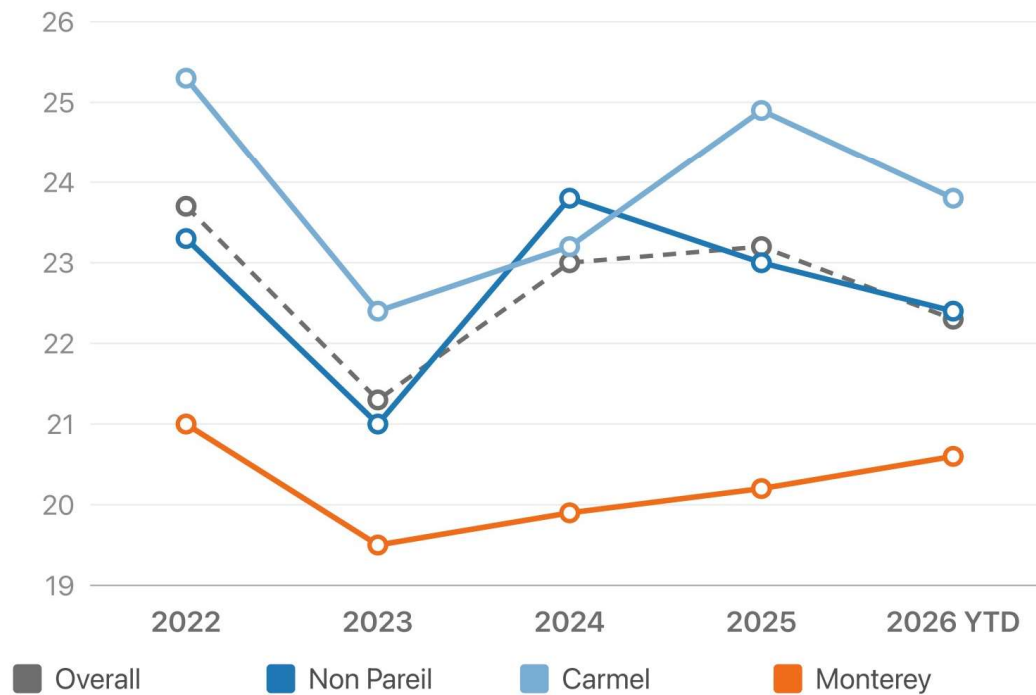
20.2% is its highest share on record, and second place for the third year running.

Carmel down 7.8 pp

23.4% breaks the roughly 30% band it held from 2022 to 2025. Mixed, Price and Wood Colony have all but disappeared.

SIZE

Kernels are modestly larger in 2026



Median down to 22.3

From 23.2 in 2025. A lower kernel count means larger kernels. Non Pareil and Carmel both move that way, Monterey is flat.

Monterey is largest every year

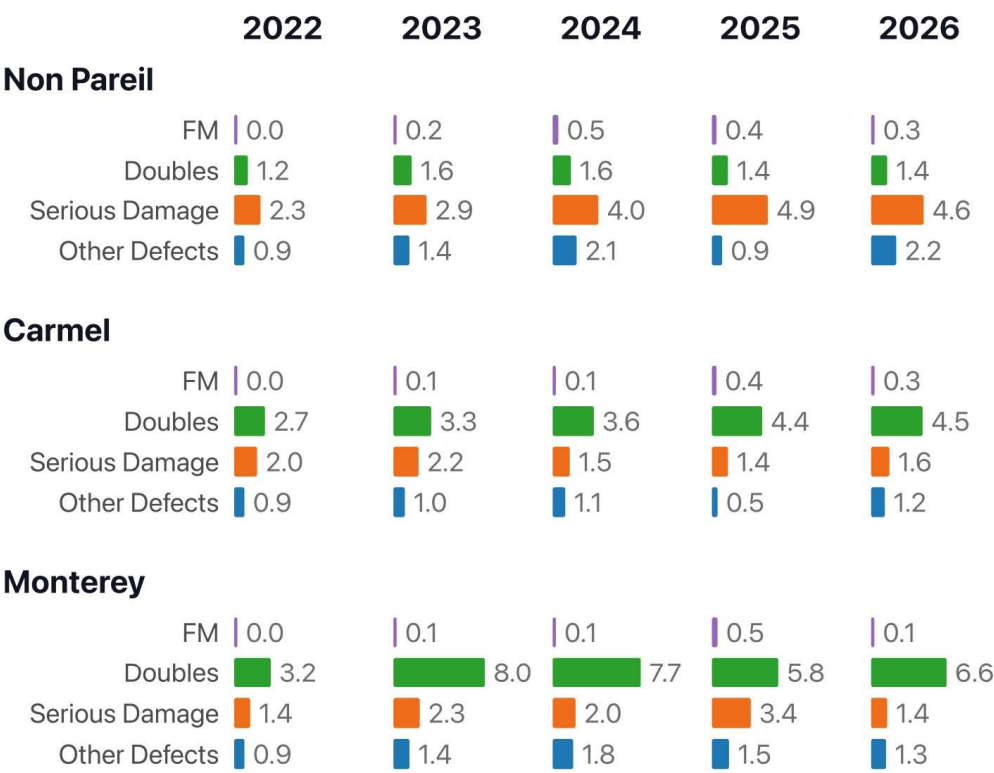
By a clear margin. Non Pareil and Carmel sit close together and swap places once, in 2024.

No multi-year trend

The median has moved between 21.3 and 23.7 without direction since 2022. Read 2026 as a one-season shift.

DEFECTS BY VARIETY

Serious Damage and Doubles carry the story



Non Pareil Serious Damage, 4.6%

Up from 2.3% in 2022 to a 4.9% peak in 2025, easing only slightly. Roughly three times the Carmel and Monterey rates.

Monterey improved most, 3.4% to 1.4%

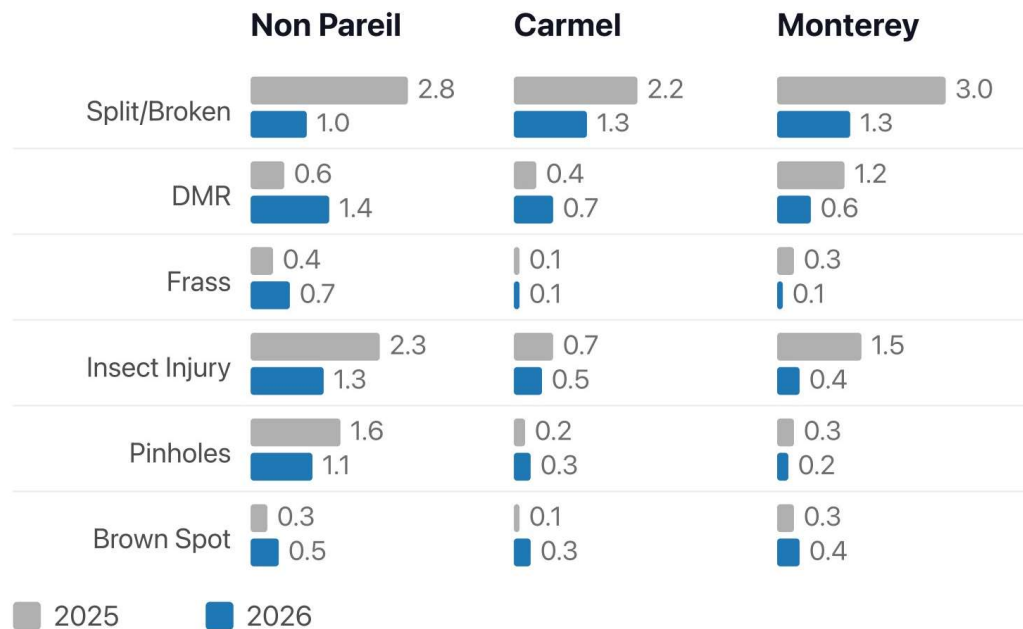
Back to its 2022 level after a one-year spike. The largest move of any general-defect rate.

Doubles persist elsewhere

Carmel has risen every year, 2.7% to 4.5%. Monterey sits at 6.6%. FM stays negligible throughout.

SPECIFIC DEFECTS

Split/Broken reverses, DMR does not



Split/Broken fell in all three

Non Pareil 2.8% to 1.0%, Carmel 2.2% to 1.3%, Monterey 3.0% to 1.3%, after rising every year from 2022 to 2025.

Insect pressure eased

Non Pareil Insect Injury 2.3% to 1.3% and Pinholes 1.6% to 1.1%, the two worst readings in the dataset.

DMR moved the wrong way

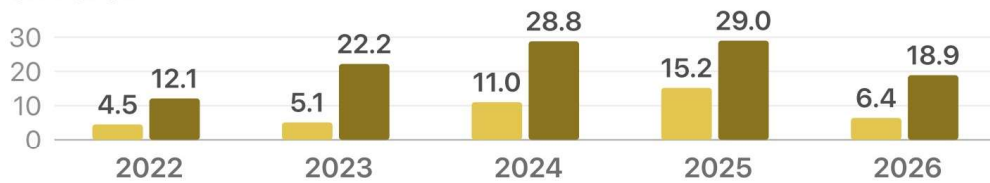
Up in Non Pareil, 0.6% to 1.4%, and Carmel, 0.4% to 0.7%. Down only in Monterey. Worth watching as a drying or handling signal.

Embedded Shell, Shrivell and Gum are omitted from the chart. All three sit at or below 0.2% in both seasons.

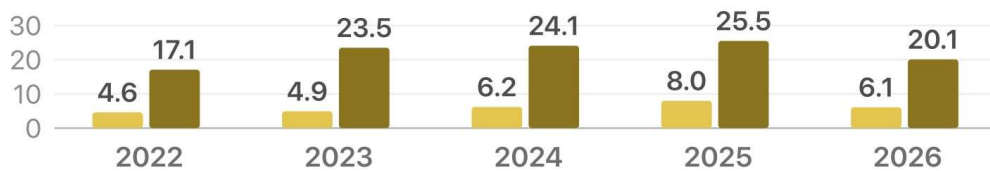
CHIP AND SCRATCH

Surface damage fell in every variety and both grades

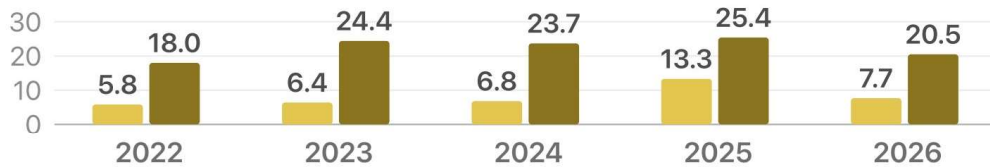
Non Pareil



Carmel



Monterey



■ CS64 ■ CS32

The most consistent improvement

The only measure in the report that moves the same way for every variety.

CS64 fell in all three

More than halving in Non Pareil, 15.2% to 6.4%. Monterey 13.3% to 7.7%, Carmel 8.0% to 6.1%. CS32 fell 4.9 to 10.1 pp.

A reversal, not a continuation

Rates climbed from 2022 through a 2025 peak. Whether the break holds through the rest of the season is the thing most worth watching.

SUMMARY

2025 and 2026 YTD differ meaningfully

- 1** **Volume is up about 9.6%** year-to-date, measured on the same calendar window in both years.
 - 2** **The season started later and slower**, then led every completed month from May.
 - 3** **The varietal mix shifted substantially.** Non Pareil up 12.6 pp, Monterey up 5.7 pp, Carmel down 7.8 pp.
 - 4** **Kernels are modestly larger**, a one-season shift inside the range seen since 2022.
 - 5** **Surface damage improved everywhere**, the first break in a climb that ran from 2022 to 2025.
 - 6** **Two measures warrant continued attention:** Serious Damage in Non Pareil and DMR.
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CONNECTING THE DOTS

Questions on any figure in this deck?

Reach out to support@qcify.com and we will be glad to help.

