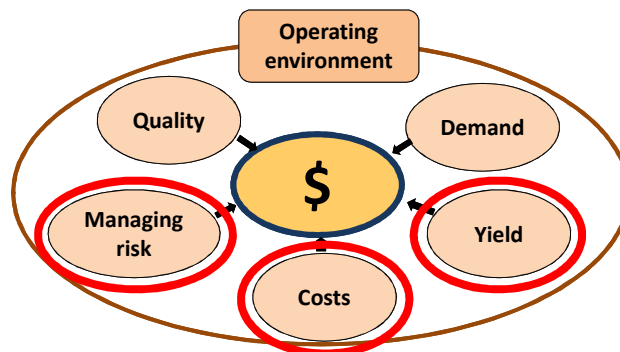




Australian Almond Industry



The Almond Board of Australia is charged with guiding the development of the industry through implementing our Strategic Plan. The aim of the Plan is to grow the industry in profitable and sustainable manner.





Australian Almond Industry

Industry Snapshot 2018



Almond production is mainly located in the Murray Darling Basin with a single commercial orchard in the Swan Region of WA.

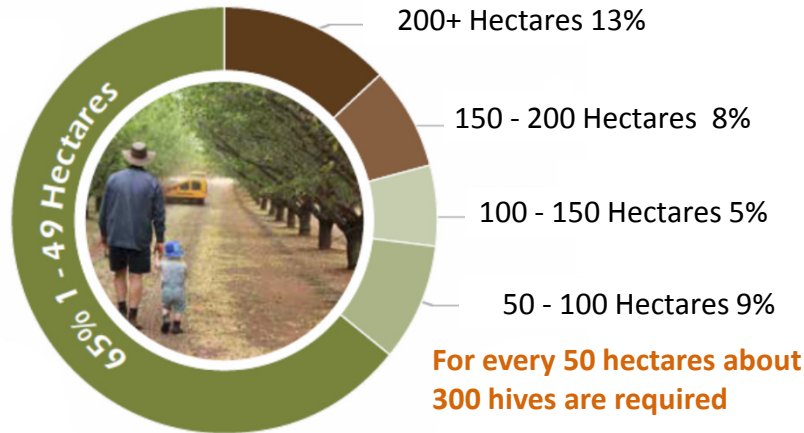


Australian Almond Industry



Industry Snapshot 2018

There are fewer than **200** almond producers in the Australian almond industry.



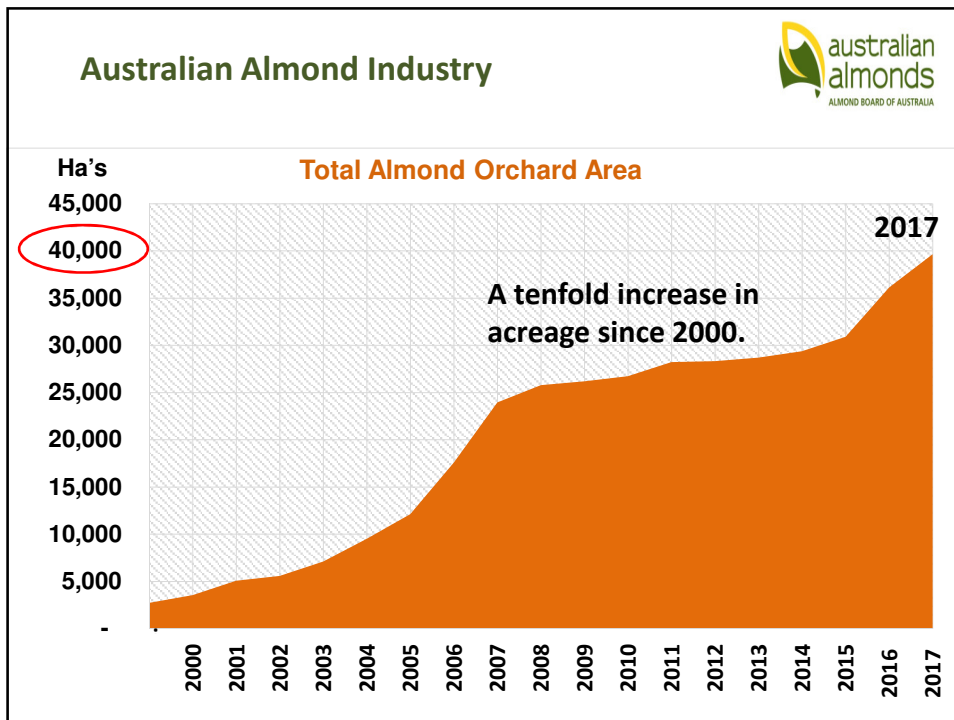
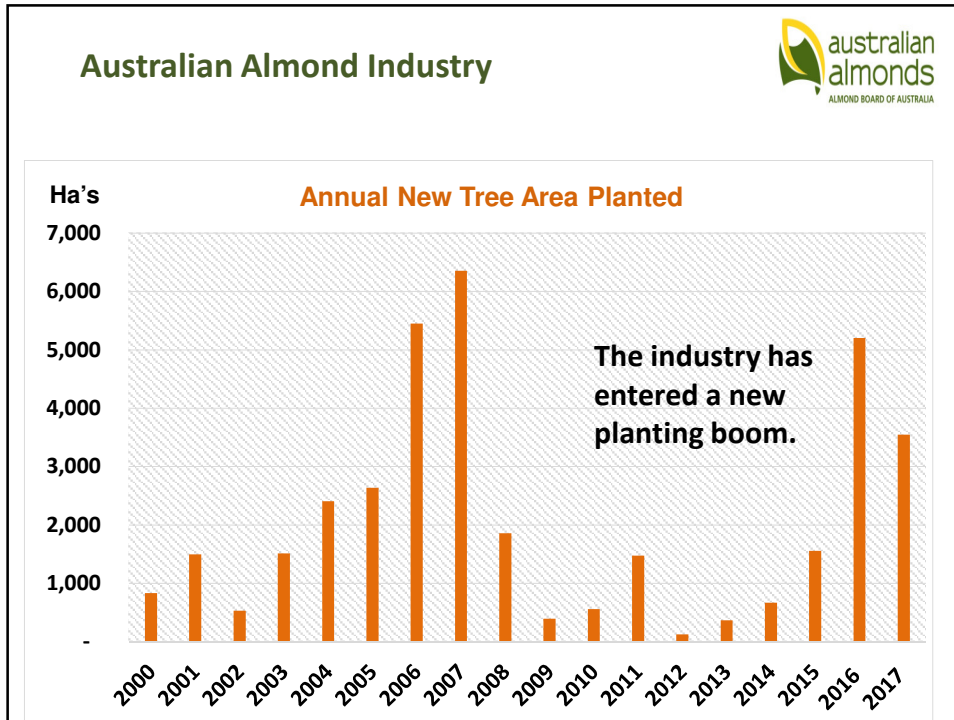
Australian Almond Industry

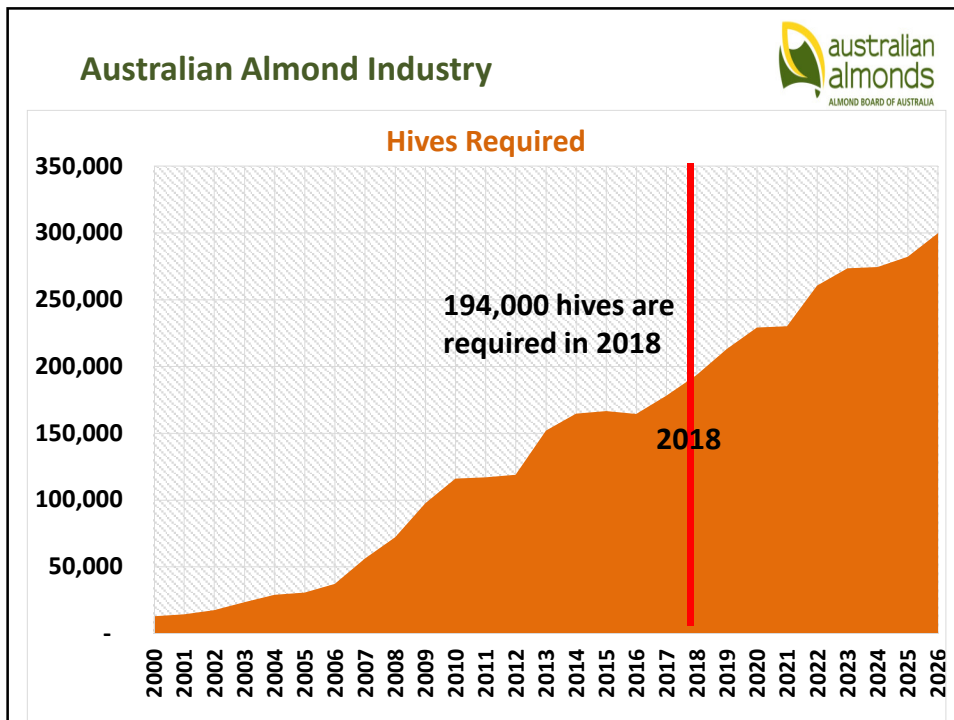
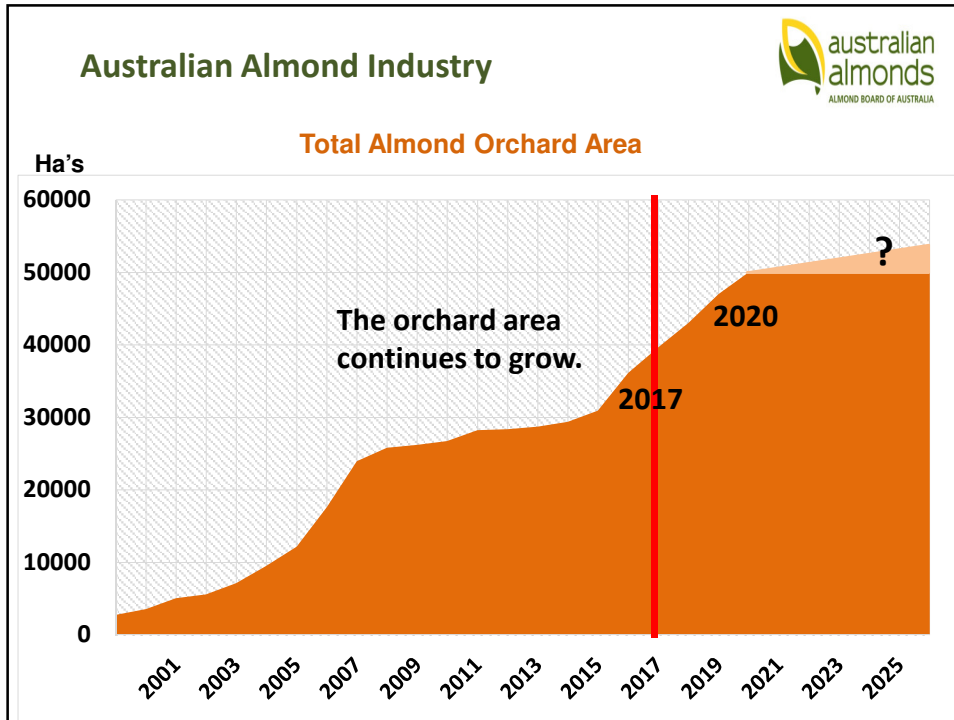


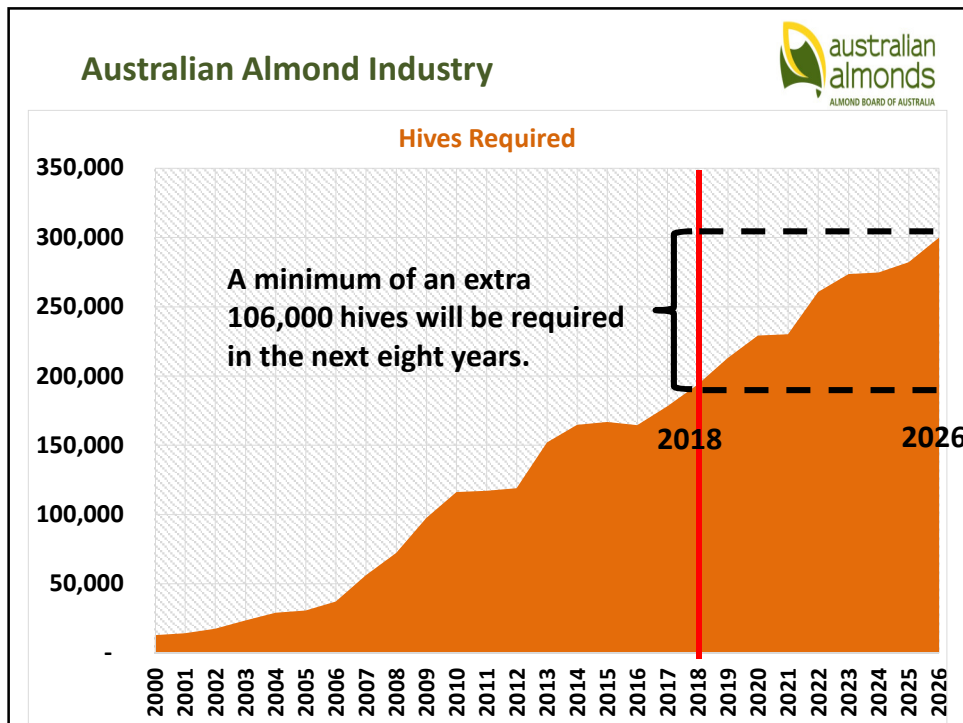
Industry Snapshot 2018

In the past three years, major new corporate orchard plantings have commenced and family enterprises are also investing in almond orchards.





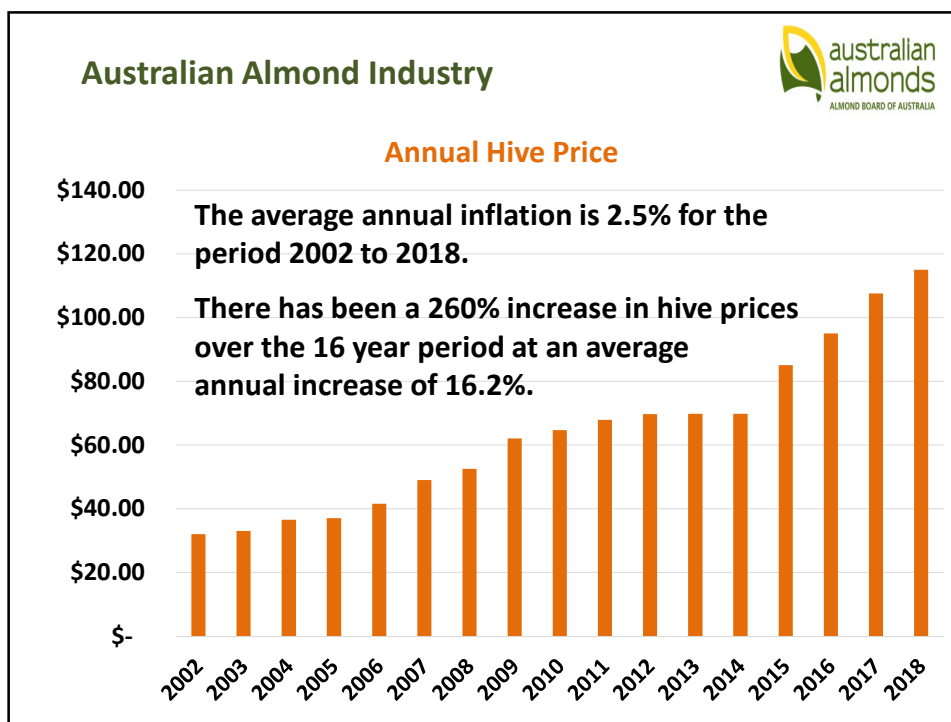




Australian Almond Industry

Pollination & water availability are keys to more orchard growth.

2016 - 30,000 hectares	
Hive Requirements: 164,000 hives	
Water Requirement: 450,000 megalitres	
2018 - 40,000 hectares	
Hive Requirements: 194,000 hives	18% increase
Water Requirement: 600,000 megalitres	
2026 - 50,000 hectares	
Minimum Hive Requirements: 300,000 hives	55% increase
Water Requirement: 750,000 megalitres	



Australian Almond Industry



ABA Pollination Committee

Pollination surety is a concern due to increased almond plantings and alternate use in August to produce honey, potentially reducing supply.

Committee members:

- Neale Bennett, ABA Chair is the Committee Chair
- Ian Zadow - IM & MJ Zadow
- Doug Somerville - NSW Dept of Primary Industries
- Ben Brown - Select Harvests Ltd
- Robert Wheatley - Olam Orchards Australia
- Peter Cavallaro - Walker Flat Almonds
- Drew Martin - Omega Orchards
- Brett Rosenzweig - Almond Board of Australia

Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers



The ABA supports bee keepers access to State and National Parks to enable an expansion of the honey bee industry.

Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns about mixing hives



Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns
- **Addressing biosecurity concerns**



Sentinel hive at Port Kembla

The almond industry is supporting the sentinel hive program through Hort Innovation levy funding of \$375,000 until 2021.

Australian Almond Industry

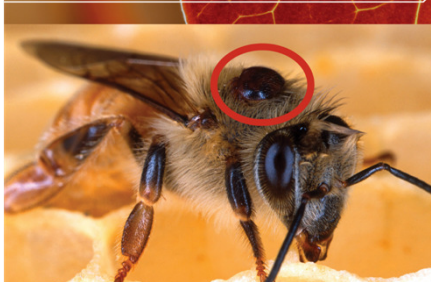


ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns
- Addressing biosecurity concerns
- **Management and funding of biosecurity eradications**

Varroa Eradication



The almond EPPRD Levy has been activated at \$1.33 per tonne for three years to pay the almond industry proportion (\$317,000) for the eradication of the Varroa Jacobsoni incursion.

Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns
- Addressing biosecurity concerns
- Management and funding of biosecurity eradications
- **Facilitating interstate hive movement**



The ABA supports a single biosecurity zone for southern Queensland, NSW, Victoria and SA (excluding Tasmania and Kangaroo Island)

Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns
- Addressing biosecurity concerns
- Management and funding of biosecurity eradications
- Facilitating interstate hive movement
- **Promoting orchard best practices such as:**
 - weed free sites
 - placement and hive drop sizes for optimising pollination
 - staged build up and withdrawal of hives
 - supplementary flowering covercrops / vegetation
 - chemical spray program management

Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns
- Addressing biosecurity concerns
- Management and funding of biosecurity eradications
- Facilitating interstate hive movement
- Promoting orchard best practices
- **Finding alternative pollinators and / or pollination technologies**
 - mechanical application
 - new production systems with smaller trees
 - self fertile varieties

Australian Almond Industry



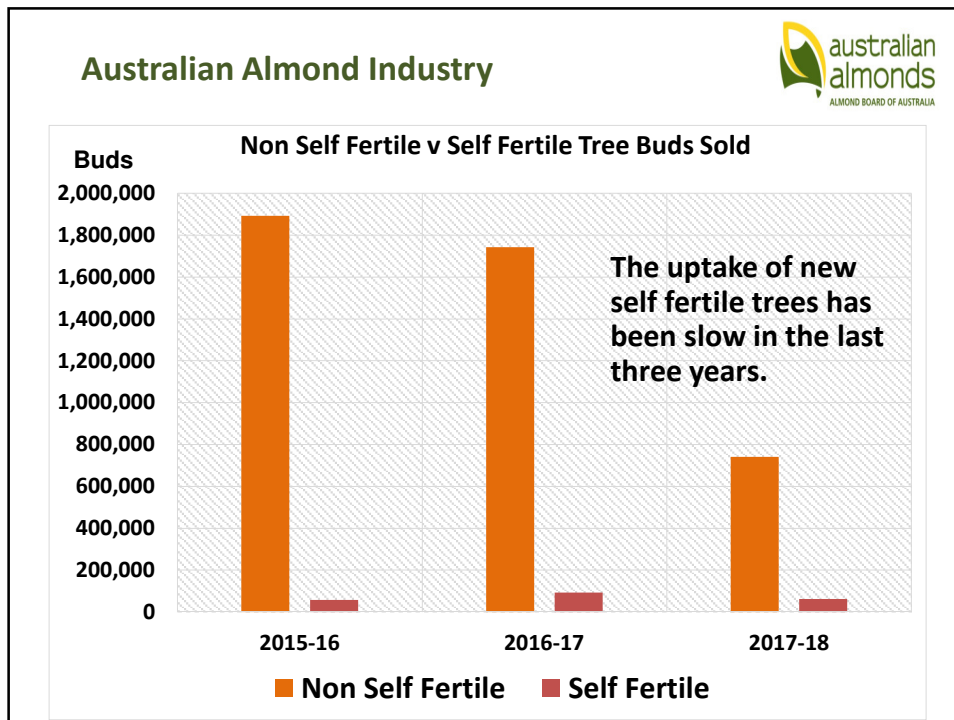
ABA Pollination Committee

Carina

Origin: seedling derived from the cross "Nonpareil" x "Lauranne" made in 1998.

A self fertile variety





Australian Almond Industry



ABA Pollination Committee

The ABA Pollination Committee is addressing:

- Increasing hive numbers
- Improving hive health and address beekeeper concerns
- Addressing biosecurity concerns
- Management and funding of biosecurity eradications
- Facilitating interstate hive movement
- Promoting orchard best practices
- Finding alternative pollinators and / or pollination technologies
- **Building strong relations with beekeepers as the wellbeing of both industries are intertwined.**



Australian Almond Industry



Marketing Snapshot


EXPORTS



2017/18 MARKETING YEAR
TOTAL EXPORT VALUE
\$428,537,771 MILLION







- Domestic almond sales are worth around \$200 million
- Australian almonds were exported to 46 countries 2017
- Almonds are Australia's most valuable hort export product
- East Asia is an emerging market for Australian almonds

Australian Almond Industry



Market Development

Free Trade Agreements

		
<p>Korea was 8% Tariff Now 0%</p>	<p>Japan was 2.4% Tariff Now 0%</p>	<p>China was 10% Tariff Now 2% but US tariff increased to 25%</p>
		
<p>Indian FTA has stalled but US tariff increased.</p>	<p>EU FTA talks are underway.</p>	<p>UK FTA talks are underway.</p>

