What the almond industry expansion means for the beekeeping industry

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.
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.

For every 50 hectares about 300 hives are required

In the past three years, major new corporate orchard plantings have commenced and family enterprises are also investing in almond orchards.
The Australian Almond Industry has entered a new planting boom. Annual new tree area planted has increased significantly since 2000, with a tenfold increase in acreage.
The orchard area continues to grow.

194,000 hives are required in 2018
A minimum of an extra 106,000 hives will be required in the next eight years.

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

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**Annual Hive Price**

The average annual inflation is 2.5% for the period 2002 to 2018.

There has been a 260% increase in hive prices over the 16 year period at an average annual increase of 16.2%.
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
The ABA Pollination Committee is addressing:

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

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

Australian Almond Industry

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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

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• 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
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- Promoting orchard best practices
- Finding alternative pollinators and/or pollination technologies
  - mechanical application
  - new production systems with smaller trees
  - self fertile varieties

Carina
Origin: seedling derived from the cross “Nonpareil” x “Lauranne” made in 1998.

A self fertile variety
The uptake of new self fertile trees has been slow in the last three years.

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- 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

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

Marketing Snapshot

- 3% in [Country A]
- 33% in [Country B]
- 9% in [Country C]
- 55% in [Country D]

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

Market Development

Free Trade Agreements

- Korea was 8% Tariff
  - Now 0%
- Japan was 2.4% Tariff
  - Now 0%
- China was 10% Tariff
  - Now 2% but US tariff increased to 25%
- Indian FTA has stalled but US tariff increased.
- EU FTA talks are underway.
- UK FTA talks are underway.
Australian Almond Industry

World Almond Actual & Projected Demand vs Supply

- Carry-out
- Global Production
- Total Supply
- Consumption

Thankyou
Thankyou