



The Australian Almond Industry

Current 2008



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Almond Industry Overview

Growing Regions

- Australian almonds are predominantly grown along the Murray River corridor.
- Major Australian almond growing regions include:
 - Sunraysia, Victoria
 - Riverina, New South Wales
 - Riverland, South Australia
 - Adelaide, South Australia



Industry Growth

- The Australian almond industry has undergone rapid expansion, becoming one of Australia's fastest growing horticulture sectors.
- On a percentage basis, Australia is the fastest growing almond industry in the world.
- Australia currently produces around 3% of world almonds, which is heavily dominated by California (82%).
- It is forecast that Australia will surpass Spain to become the world's second largest almond producer by 2015.

Almond Plantings

- Currently there are more than 27,300 hectares (67,500 acres) of almonds are planted in Australia.
- Less than 20% of all Australian almond plantings have reached full maturity (eight years and older).
- More than half of total Australian almond plantings are non-bearing (less than three years).

Almond Production

- Australian almond production in 2008 totalled 26,000 tonnes (kernel).
- Future production increases will occur as young plantings reach full maturity, bringing future productive capacity to 80,000 tonnes by 2015, a three-fold increase over current production.

Demand for Almonds

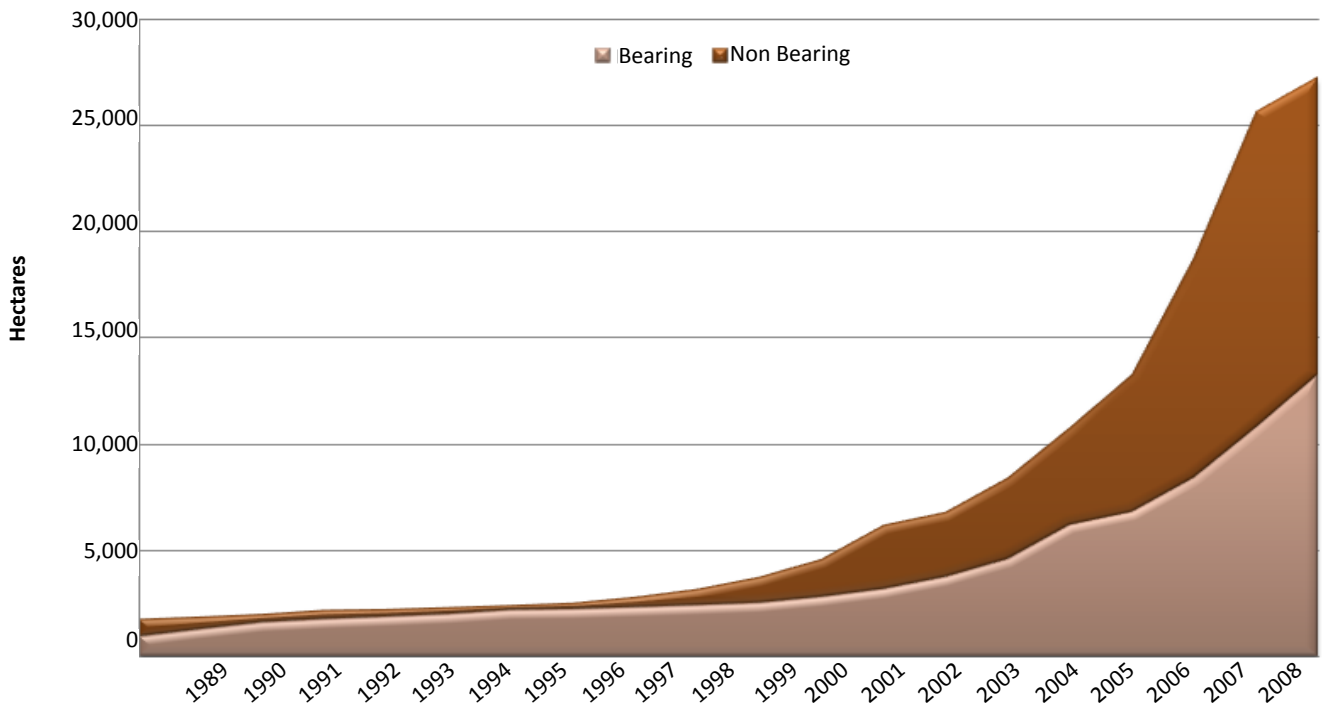
- Consumer demand for almonds has increased globally, with world almond consumption doubling in the past decade.
- This demand growth trend is expected to continue, being led by dominant world producer, California where the value of almonds exceeds \$2.3 billion.
- Taste, versatility and health benefits of almonds have been major factors behind this growth.



Almond Plantings

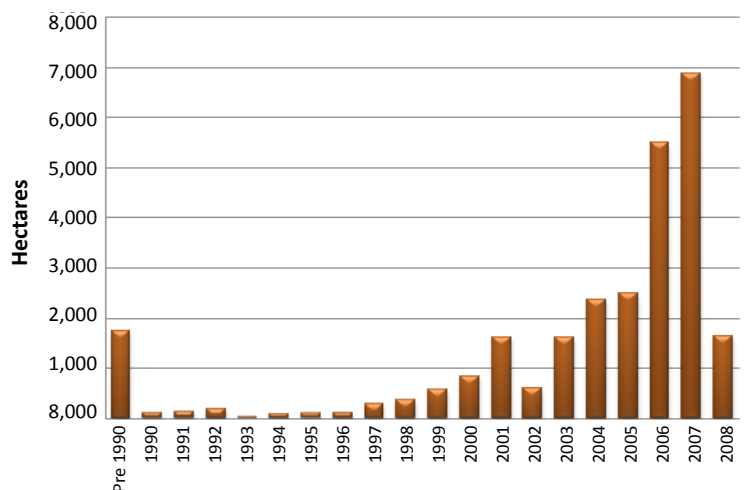
- Australian almond plantings have increased over the past nine years: from 3,750 hectares (9,000 acres) in 1999 to 27,300 hectares (67,500 acres) in 2008.
- Less than 20% of Australian almond plantings have reached full maturity (eight years and older).
- More than half of plantings are non-bearing (less than three years).

Australian Almond Plantings



Australian State	Non-bearing acres
New South Wales (NSW)	76%
Victoria (VIC)	57%
South Australia (SA)	19%

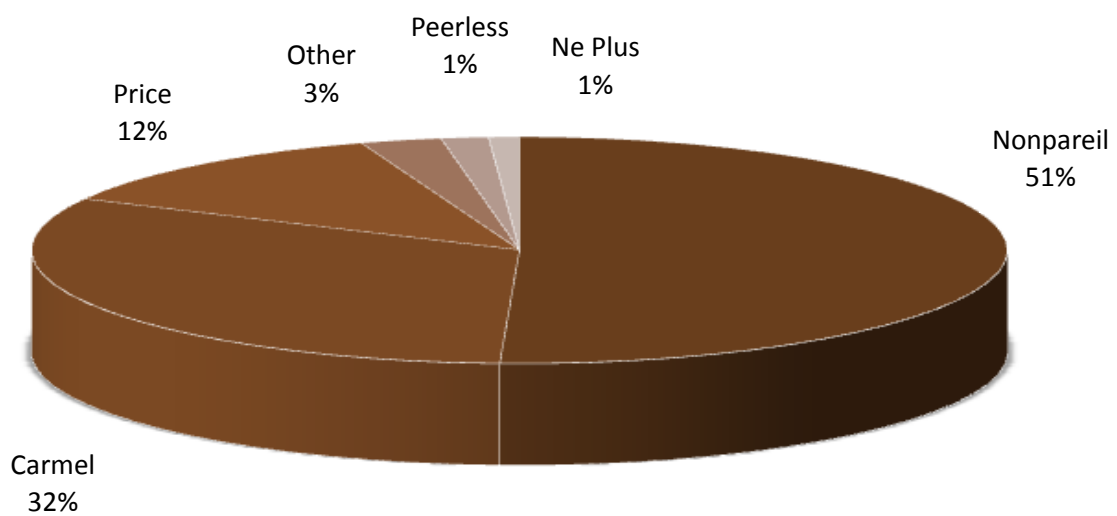
Age of Almond Plantings



Almond Plantings

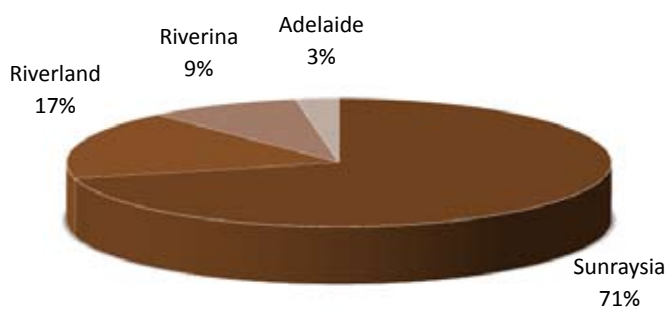
- Nonpareil is currently the dominant variety, with over 50% of plantings.
- Carmel is the most popular pollinator, with 32% of plantings, followed by Price (12%).
- Other pollinators include Ne Plus, Peerless, Mission, Monterey and Fritz.

Almond Plantings by Variety

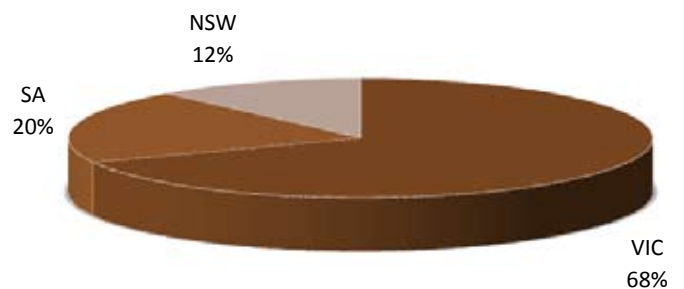


- Sunraysia (Victoria) is the largest Australian almond growing region, with more than 70% of plantings, followed by the Riverland (South Australia) and Riverina (New South Wales).

Almond Plantings by Region

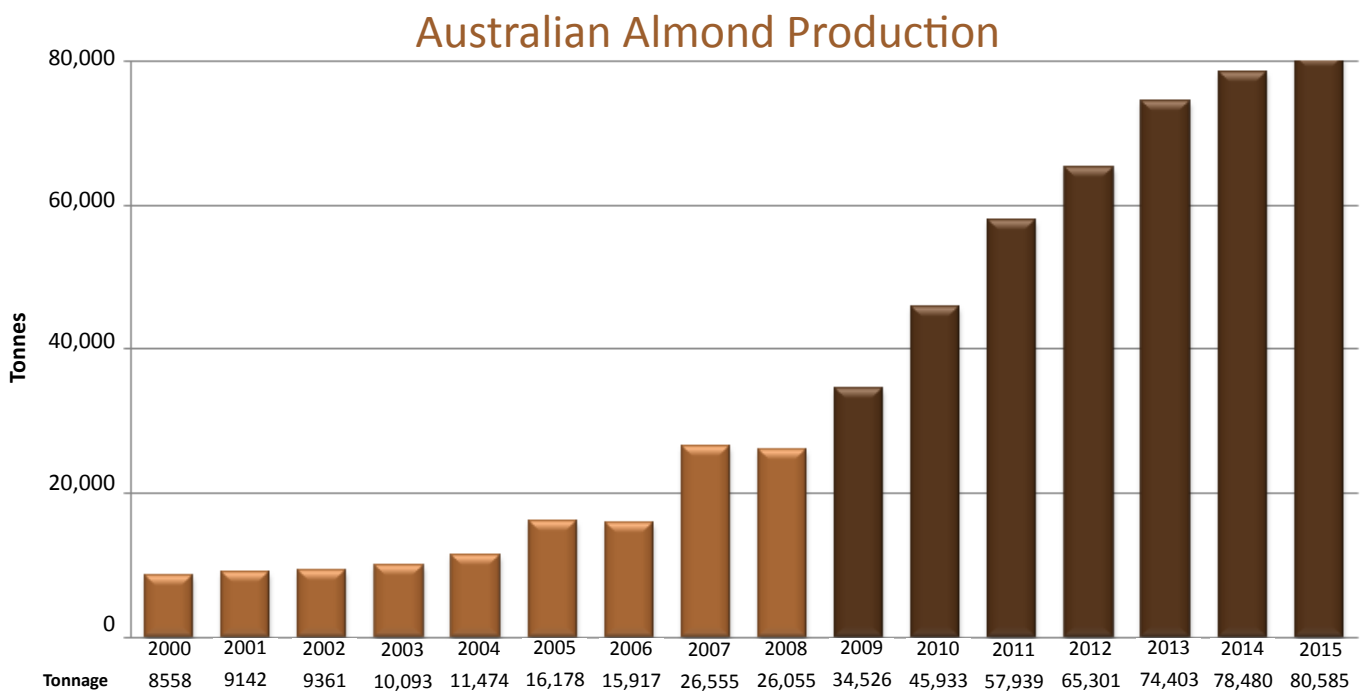


Almond Plantings by State

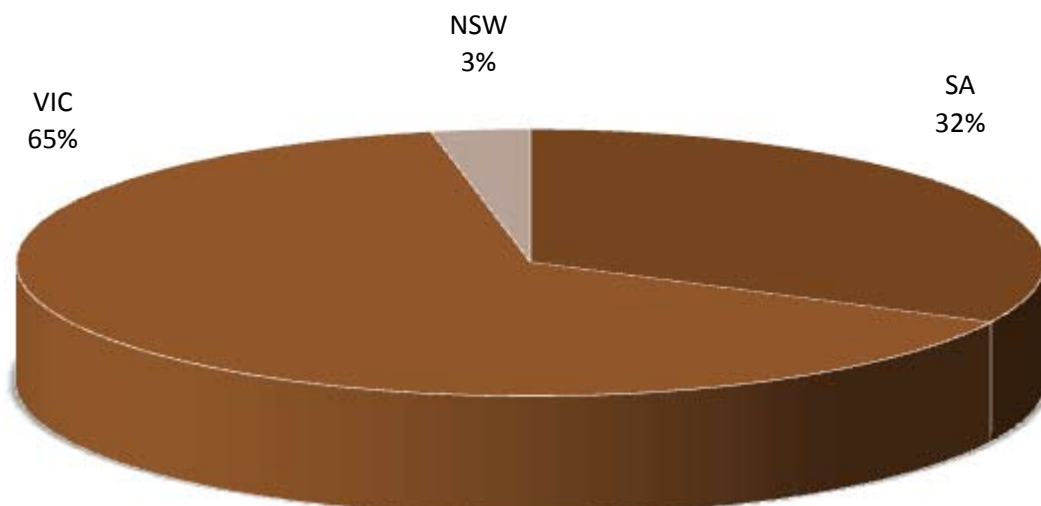


Almond Production

- Australian Almond production in 2008 totalled more than 26,000 tonnes kernel (57.32 million pounds).
- Future production increases will occur as young plantings reach full maturity.
- Based on existing plantings, productive capacity is expected to reach 80,000 tonnes of kernel (176 million pounds) by 2015, a three-fold increase of current production.



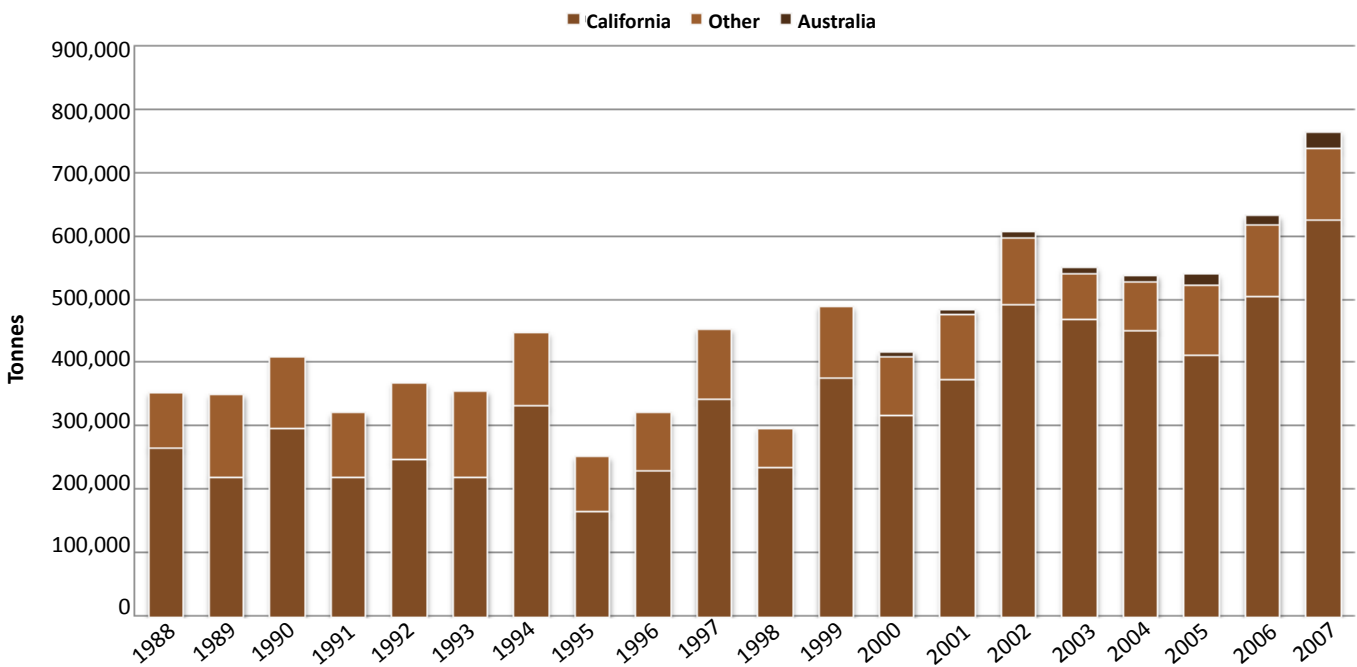
Almond Production by State - 2008



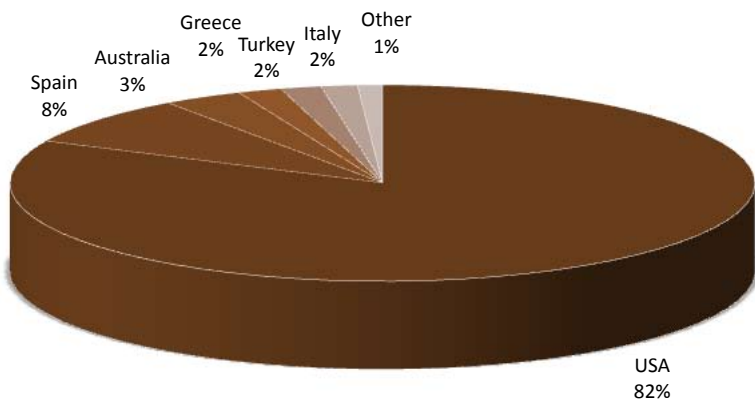
Almond Production

- Australia is the third largest producer of almonds in the world, currently producing around 3% of world almonds, behind dominant global leaders USA (82%) and Spain (8%).
- Based on existing plantings reaching full maturation, Australia will overtake Spain and become the second largest producer by 2012.
- On a percentage basis, Australia is the fastest growing almond industry in the world.

Australia's Contribution to Global Almond Production



Global Almond Production - 2007



2007	Tonnes
USA	627,318
Spain	62,596
Australia	26,555
Greece	14,515
Turkey	13,608
Italy	12,020
Chile	6,600
China	1,636
India	1,089
Total	765,937



AUSTRALIAN ALMONDS –

Nonpareil

Inshell

Cross Section

Front

Side

Number of almonds per 18/20



Carmel



Australian Grades

Nonpareil Fancy Grade

Nonpareil Extra Supreme

Nonpareil Supreme



Other Almond Varieties

Price

Fritz

Mission



Processed Almonds

Blanched Whole

Natural Sliced

Blanched Sliced

Blanched Sliced



Naturally the best!



per 28.35 grams

20/22 22/24 23/25 25/27 27/30 30/32



Carmel Extra Supreme

Carmel Supreme

Manufacturing Grade



Inshell
Varieties

Peerless Inshell

Peerless Cross Section



Slivered

Natural Diced

Blanched Diced

Natural Meal

Blanched Meal



From a
healthy, clean
environment

Blossom
in August

Harvest
in March

Available
'Fresh'
in April



Almond Lifecycle

Dormancy

Almond trees are dormant over the colder winter period, around May to July in Australia.

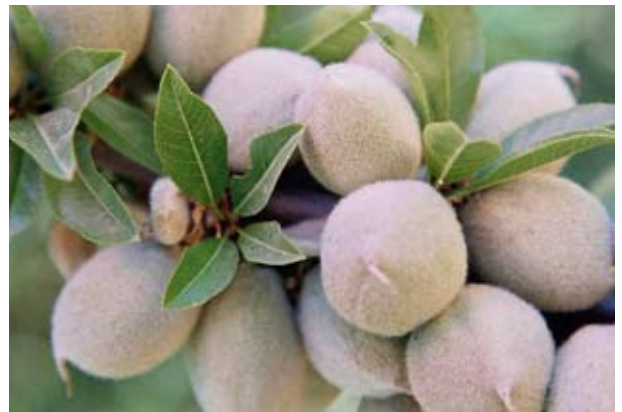


Blossom

Blossom usually occurs in late July to early August. At the start of blossom in almond orchards, you will often see alternate rows in bloom. This is because almonds are not self-pollinating, so there are always 2-3 varieties interplanted in an orchard. Bees are used to cross-pollinate the blossoms.

Maturing Nuts

During September and October, blossom petals fall and leaves begin to form on the trees. The fuzzy greyish-green fruit starts to form, and grows rapidly in size over spring. The hulls which cover the growing nuts continue to mature and harden.



Almond Lifecycle



Hull Split

The hardened hulls usually start to split over summer, around January and February. Over the next month the splits widen and open further. The almond shell is now visible through the split in the husk, and the nut itself begins to dry out. Eventually, the nut separates from its stem and the hull opens completely.

Harvest

Harvest occurs between February and April, when the kernel is at an acceptable moisture level. Mechanical harvesting requires that orchard floors be clear of large weeds and swept of all foreign material. Shakers are used to vibrate the tree trunk, so that the husks, shells and nuts inside fall to the orchard floor. After drying, they are swept into rows and picked up ready for storage.



Processing

The first step in processing almonds is to remove the hull and shell of the almond. This is known as either hulling and shelling, or cracking.

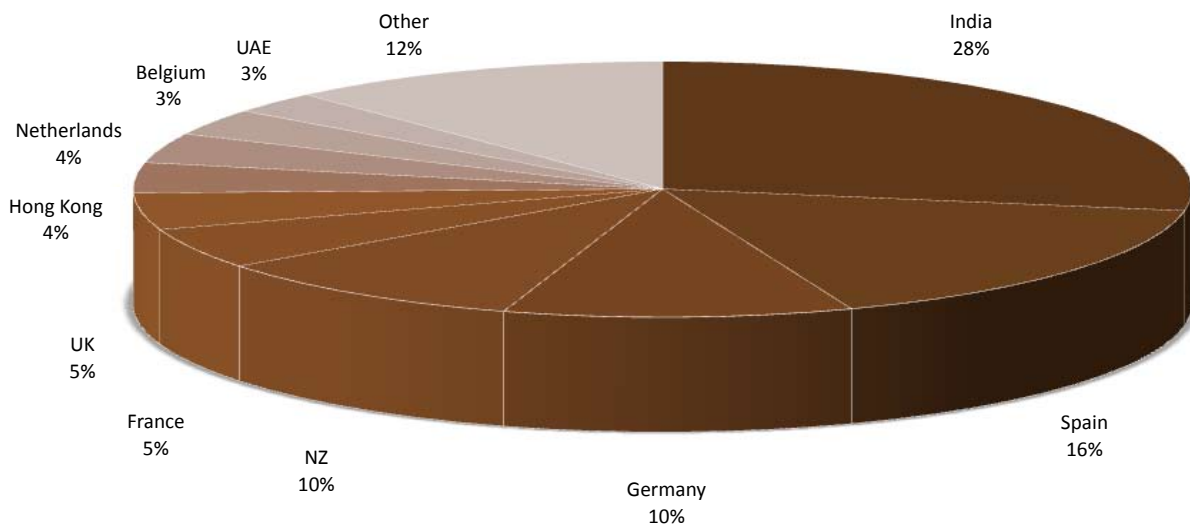
Almonds can be slivered, sliced, diced, split, left whole or ground (meal/flour) depending on application.



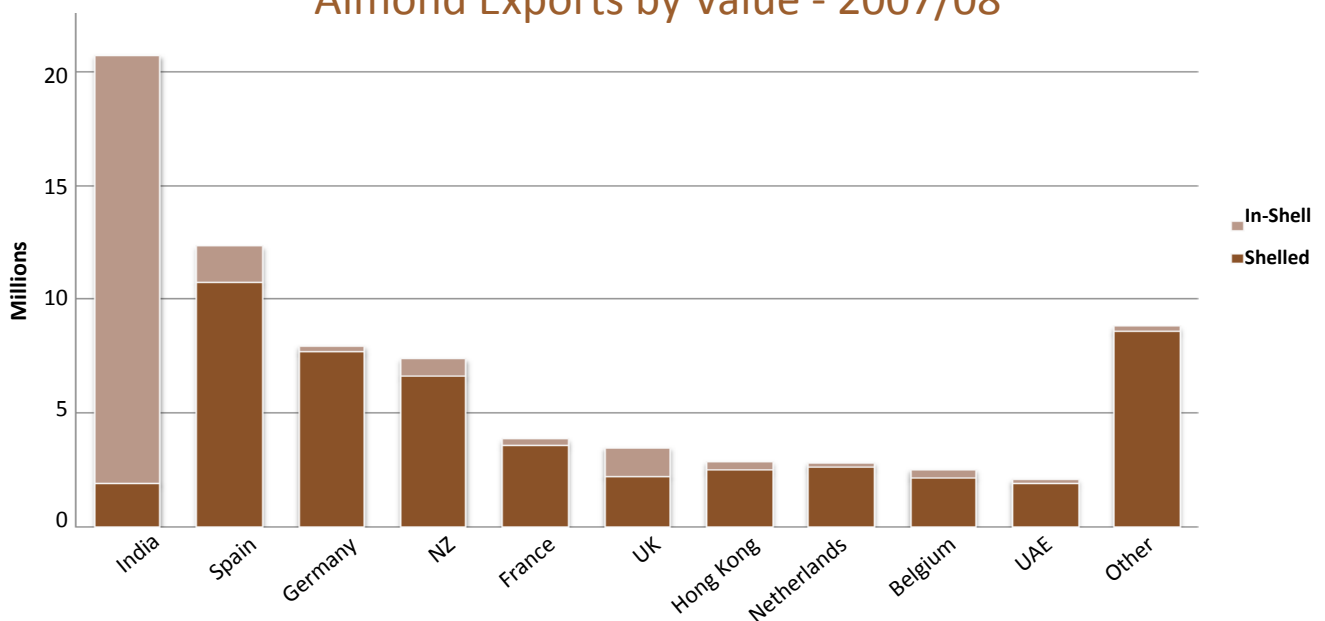
Almond Sales

- Australian almonds are currently exported to more than 40 countries. Exports represented 50% of 2007/08 Australian almond sales.
- In 2007/08 Australia exported \$75 million of almonds: 9,200 tonnes (20.3 million pounds) of kernel and 5,800 tonnes (12.8 million pounds) of in-shell almonds.

Almond Exports by Value - 2007/08



Almond Exports by Value - 2007/08



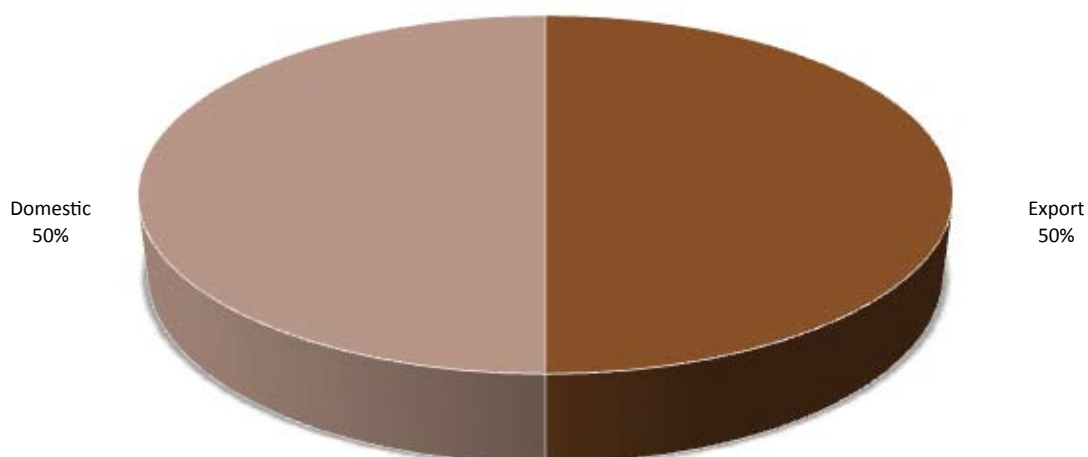
Almond Sales

- As an exporter, Australia has 3% of the world market share.
- Export sales accounted for 50% of Australian almond sales in 2007/08.

Australian Almond Sales 2007/08	Tonnes (kernel weight)
Domestic Almond Sales	11,130
Export Sales	11,300
Total Australian Almond Sales	22,430

Imports	2,600
Domestic Almond Consumption	13,730

Australian Almond Sales - 2007/08



Almond Nutrition & Health

Nutritional Benefits

- Note that almonds are extremely high in Vitamin E.
- They also contain folate, essential for women of childbearing age.
- Almonds are very low in sugar and are a low GI food. Eating low-GI foods helps in regulating weight and blood sugar.
- Almonds are Gluten free.

Almonds and a healthy heart

- Almonds contain “good” monounsaturated fat - also found in olive oil and avocados. Studies show that diets which replace saturated fat with “good” monounsaturated fat, are beneficial for the heart* and almonds are a natural source of phytosterols, which are plant compounds that also help to keep a healthy heart.

* National Heart Foundation of Australia. Position statement on dietary fat. November 1999

A handful of Almonds everyday* is good for your heart.

* When replacing foods higher in saturated fat.

- Natural or unsalted almonds are Heart Foundation Tick approved



Nutrient	Units	Value per 100 grams	Per 1 cup whole almonds
Water	g	5.25	7.51
Energy	kcal	578	827
Energy	kJ	2418	3458
Protein	g	21.26	30.40
Total lipid (fat)	g	50.64	72.42
Carbohydrate	g	19.74	28.23
Dietary fibre	g	11.8	16.9
Sugars, total	g	4.80	6.86
Minerals			
Calcium, Ca	mg	248	355
Iron, Fe	mg	4.30	6.15
Magnesium, Mg	mg	275	393
Phosphorus, P	mg	474	678
Potassium, K	mg	728	1041
Sodium, Na	mg	1	1
Zinc, Zn	mg	3.36	4.80
Copper, Cu	mg	1.110	1.587
Manganese, Mn	mg	2.535	3.625
Selenium, Se	mcg	2.8	4.0
Vitamins			
Vitamin C	mg	0.0	0.0
Riboflavin	mg	0.811	1.160
Niacin	mg	3.925	5.613
Vitamin B-6	mg	0.131	0.187
Folate, total	mcg	29	41
Folic acid	mcg	0	0
Vitamin B-12	mcg	0.00	0.00
Vitamin A, IU	IU	5	7
Vitamin A, RAE	mcg_RAE	0	0
Vitamin E (alpha-tocopherol)	mg	25.87	36.99
Vitamin E, added	mg	0.00	0.00
Lipids			
Fatty acids, total saturated	g	3.881	



Almond Sellers

There are three major sellers of Australian almonds:

Almondco Australia

Sturt Highway, PO Box 1744
Renmark, South Australia, 5341
Telephone: +61 8 8595 1770
Facsimile: +61 8 8595 1559
sales@almondco.com.au
www.almondco.com.au



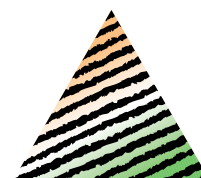
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