

# Australian Almond Statistics Report



# 2009 Report



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Information in this report has been sourced from the ABA's internal data collection activities, the Almond Board of California (ABC), the United States Department of Agriculture (USDA), Horticulture Australia Limited (HAL) and the Australian Bureau of Statistics (ABS).

In 2005 the Almond Board of Australia (ABA) embarked on an Industry Statistics Collection Program to facilitate the production of accurate and timely information with respect to the Australian Almond Industry.

A major component of this program is an annual survey of Australian almond growers, intended to collect and update planting data.

This report provides an overview of planting survey results. **It should be noted that this planting data does not account for plantings in previous years that have since been removed.**

## Procedure

The source of planting data summarised in this report is an Australian Almond Planting Survey, distributed to all known Australian almond growers. More than 160 surveys were distributed in September 2009.

Surveys contain pre-printed data previously reported of almond plantings by variety, irrigation type, acreage, age, tree spacing and location. Survey participants are requested to provide updated information of any new plantings, removals and corrections. New growers were also issued with blank surveys for completion.

Greater than 95% survey response was received in 2009. It is estimated that the remaining 5% collectively represents 225 hectares (556 acres) of almond plantings, less than 1% of total plantings.

## Results

Total Australian almond plantings are estimated at 27,903 hectares (68,950 acres). Detailed survey data totals 27,678 hectares (68,394 acres), comprising 18,668 bearing hectares (46,129 acres) and non-bearing plantings of 9,010 hectares (22,265 acres). Consequently non-bearing plantings equate to one third of current plantings.

Nonpareil continues to be the most predominant variety, comprising approximately half of total plantings, followed by Carmel (32%) and Price (12%). Collectively these three varieties represent 95% of total Australian almond plantings.

## Acknowledgements

The Almond Board of Australia wishes to extend appreciation to all almond industry members who have participated in the ABA's data collection activities.

This process was partially funded by the Australian Government through Horticulture Australia Limited (HAL).



**ALMOND  
BOARD OF  
AUSTRALIA**

Almond Board of Australia (ABA) is a non-profit, membership based organisation representing the interests of Australian almond growers, processors and marketers.

As the Australian Almond industry's peak body, the ABA facilitates further growth of the industry, seeks to maximise its profitability and ensure its sustainability by providing a platform for industry members to collectively respond to industry wide issues, invest in research and marketing, share knowledge, and interact with government and other stakeholders.



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# Australian Almond Overview



## Almonds Worldwide

- Consumer demand for almonds has increased globally and this trend is expected to continue due to the positive nut health message.
- Taste, versatility and health benefits of almonds have all been major factors behind increasing worldwide consumption.
- Global almond consumption has doubled over the past decade.
- This demand growth trend is expected to continue, being led by major world producer: California, where the value of almonds exceeds US\$2.3 billion.
- Almonds are California's largest tree nut crop in total dollar value and acreage. They rank as the largest US specialty crop export, as well as the top agricultural export of the state of California with exports value of US\$1.9 billion.

## Industry Growth

- The Australian almond industry has undergone rapid expansion since 2001.
- On a percentage basis, Australia is the fastest growing almond industry in the world.
- In 2008, Australia produced 3% of world almonds, with major world producer being California (85%).
- It is forecast that Australia will surpass Spain (6%) to become the world's second largest almond producer within the next few years.

## Producing Regions

Australian almonds are predominantly grown along the Murray River corridor, across three states:

- New South Wales (NSW)
- South Australia (SA)
- Victoria (VIC)

Australia has four major almond growing regions:

- Adelaide
- Riverland
- Riverina
- Sunraysia



## Value of Almonds

- The Australian almond industry has a current estimated value of greater than \$250 million, with related exports of \$121 million.
- Additional production from newly planted orchards is expected to double the industry's current value to an estimated \$570 million by 2015.
- The growing, harvesting, transporting, storage, processing, value adding and marketing of almonds is a major contributor to the economic and social wellbeing of the Sunraysia district in Victoria and the Riverland of South Australia.

## Almond Plantings

- Total Australian almond acreage has increased six-fold over the past nine years: 4,595 hectares (11,352 acres) in 2000 to more than 27,678 hectares (68,394 acres) in 2009.
- Approximately one quarter of Australian almond plantings have reached full maturity (eight years and older). One third of total Australian almond plantings are non-bearing (less than three years).
- 90% of total almond plantings are drip irrigated, with less than 10% under sprinkler irrigation.

## Almond Production

- Australian almond production in 2009 totalled just over 36,500 tonnes (kernel).
- Future production increases will occur as young plantings reach full maturity, bringing productive capacity to greater than 80,000 tonnes by 2015, more than double that of 2009 production.

## Investment in Almonds

- Almonds have become an attractive crop for investors because the industry has proven to be profitable and stable over the longer term.
- Reasons for this include the ability to develop and manage orchards on a larger scale, together with the development of new growing technologies that have enhanced profitability and maintained international competitiveness.

# Almond Plantings

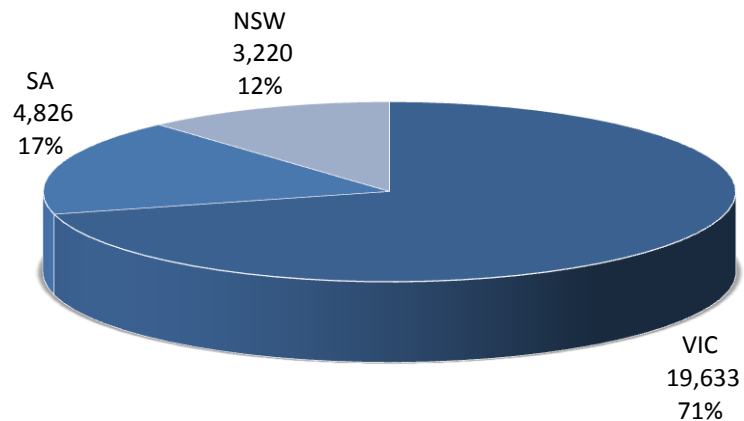


## Almond Plantings by Variety (Hectares)

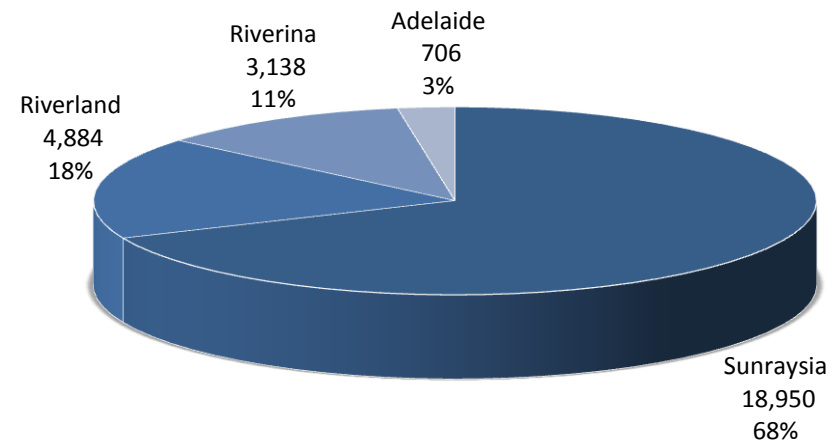
Variety	Pre 2000	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Bearing	Non-B	Total	%
Baxendale	89											89	0	89	0%
Butte	0							3	35	3		3	38	41	0%
Carmel	726	259	536	177	506	801	810	1,900	2,383	606	89	5,715	3,078	8,792	32%
Fritz	120	4	2									126	0	126	0%
Johnston	34	2	2					0				38	0	38	0%
Keane	14	2	7	5	17	7		4	14	4	2	56	20	76	0%
Mission	104											104	0	104	0%
Monterey	0			7	1	6	15	66	70	16	65	95	151	246	1%
Ne Plus	228	16	10		1	0	0	0				254	0	254	1%
Nonpareil	1,908	409	815	323	831	1,223	1,274	2,757	3,417	856	229	9,542	4,502	14,044	51%
Other	44	1	3	0	0	0	0	0	0	0	3	48	3	51	0%
Padre	0							3	35	3		3	38	41	0%
Peerless	141	46	21	23	29	31	24	54	53	8	2	367	62	429	2%
Price	238	91	211	75	229	288	363	735	871	235	12	2,230	1,118	3,349	12%
<b>TOTAL</b>	<b>3,648</b>	<b>829</b>	<b>1,608</b>	<b>609</b>	<b>1,614</b>	<b>2,356</b>	<b>2,480</b>	<b>5,516</b>	<b>6,878</b>	<b>1,731</b>	<b>401</b>	<b>18,668</b>	<b>9,010</b>	<b>27,678</b>	<b>100%</b>
%	13%	3%	6%	2%	6%	9%	9%	20%	25%	6%	1%	67%	33%	100%	

Note: Totals may not add due to rounding

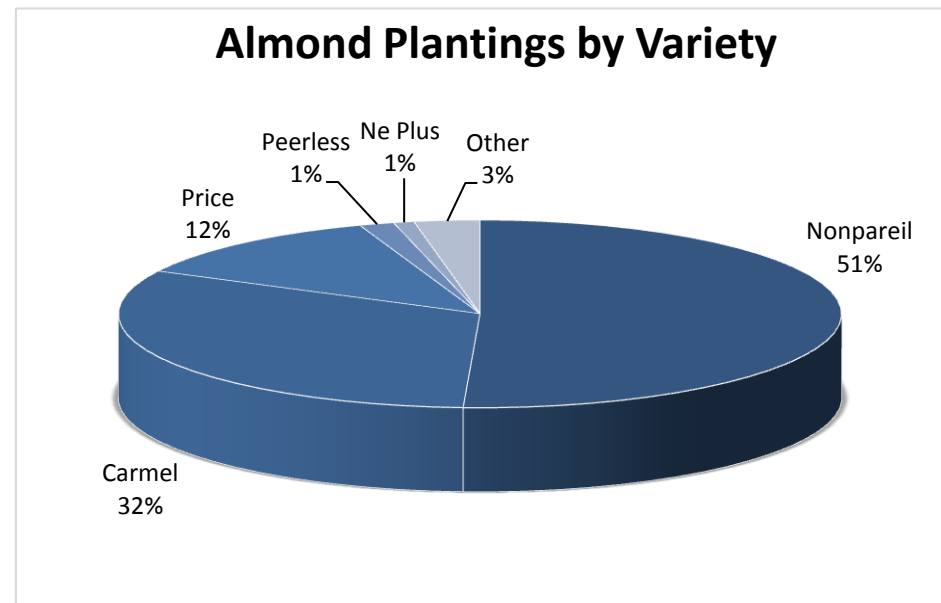
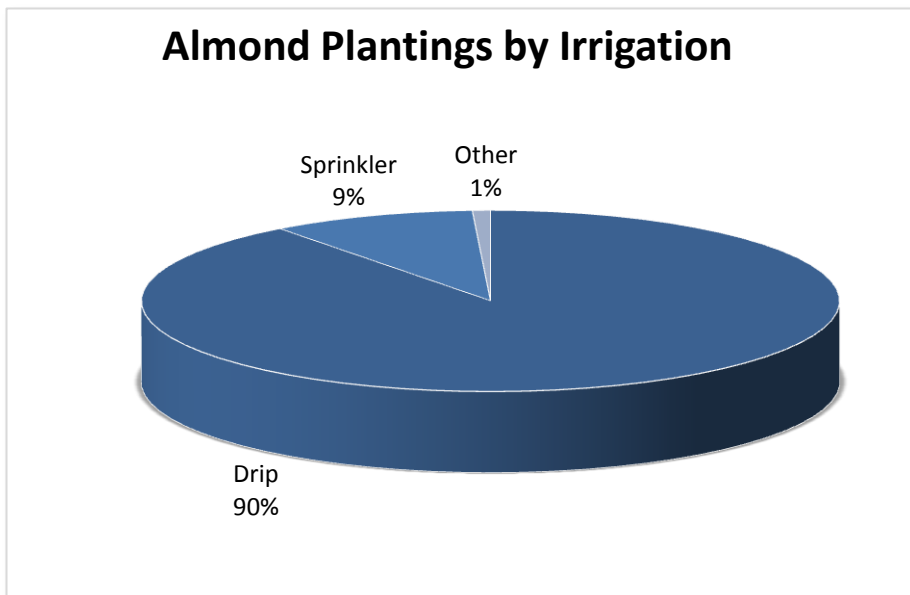
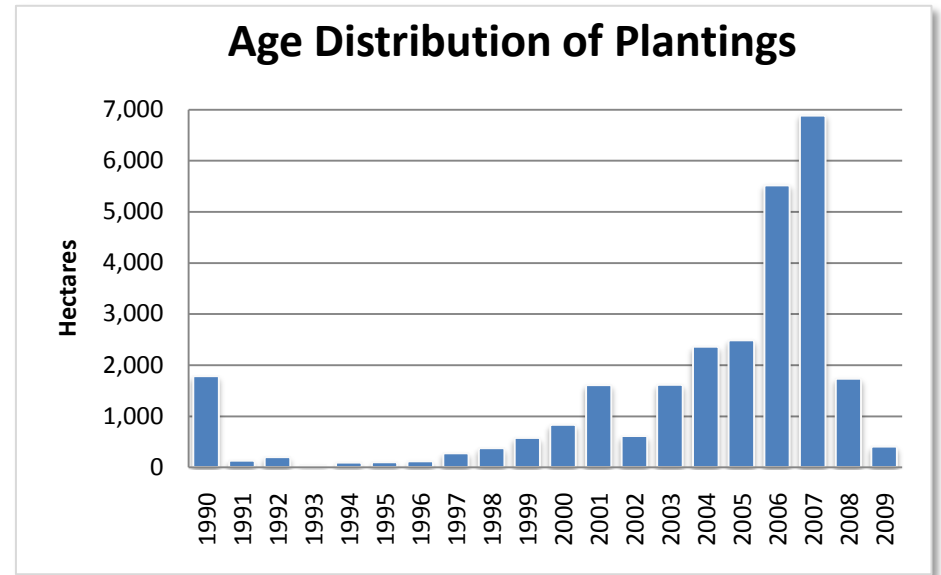
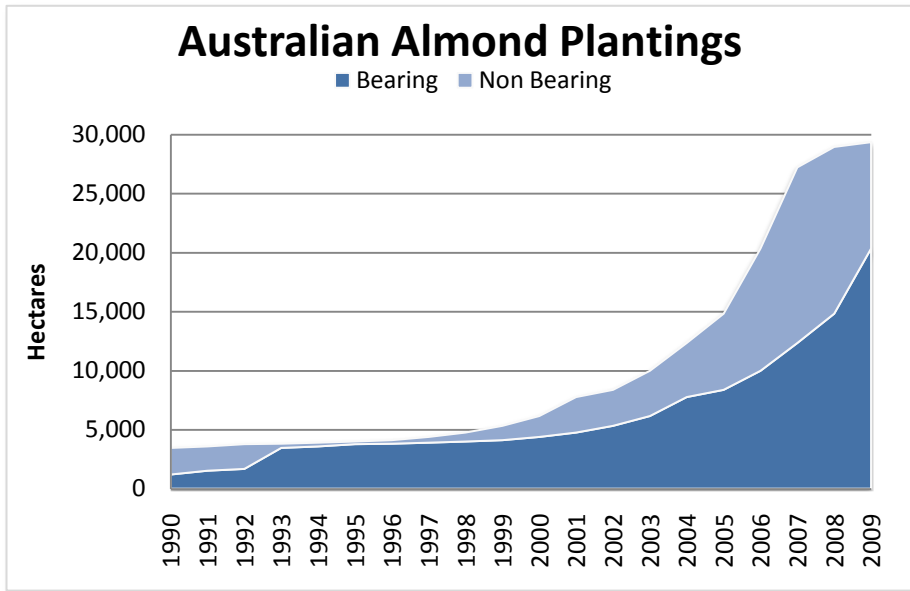
### Almond Hectares by State



### Almond Hectares by Region



# Almond Plantings



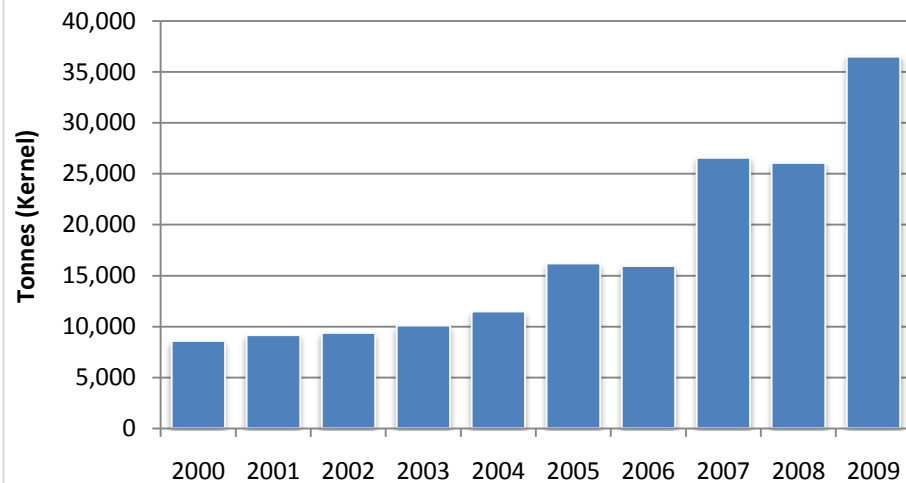
# Almond Production



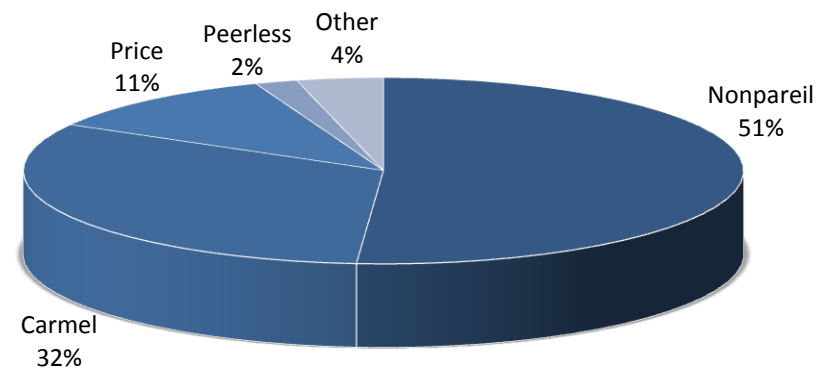
## Almond Production by Variety (Tonnes Kernel)

Variety	2002		2003		2004		2005		2006		2007		2008		2009	
Baxendale	250	3%	221	2%	189	2%	210	1%	163	1%	230	1%	168	1%	173	0%
Carmel	1,577	17%	1,840	18%	2,483	22%	3,807	24%	4,246	27%	7,383	28%	7,996	31%	11,681	32%
Chellaston	51	1%	43	0%	43	0%	42	0%	59	0%	62	0%	23	0%	33	0%
Fritz	284	3%	309	3%	288	3%	321	2%	249	2%	331	1%	240	1%	151	0%
Johnston	23	0%	24	0%	20	0%	16	0%	30	0%	36	0%	35	0%	47	0%
Keane	46	0%	58	1%	62	1%	79	0%	112	1%	132	0%	70	0%	69	0%
Mission	322	3%	325	3%	293	3%	333	2%	273	2%	314	1%	250	1%	196	1%
Monterey	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	42	0%	97	0%
Ne Plus	585	6%	635	6%	593	5%	616	4%	594	4%	823	3%	527	2%	443	1%
Nonpareil	5,265	56%	5,427	54%	6,028	53%	8,691	54%	7,989	50%	13,751	52%	13,430	52%	18,686	51%
Peerless	340	4%	384	4%	558	5%	466	3%	491	3%	609	2%	597	2%	693	2%
Price	318	3%	399	4%	474	4%	936	6%	903	6%	2,037	8%	2,338	9%	4,023	11%
Other	300	3%	429	4%	442	4%	660	4%	802	5%	848	3%	342	1%	209	1%
<b>TOTAL</b>	<b>9,361</b>	<b>100%</b>	<b>10,093</b>	<b>100%</b>	<b>11,474</b>	<b>100%</b>	<b>16,178</b>	<b>100%</b>	<b>15,917</b>	<b>100%</b>	<b>26,555</b>	<b>100%</b>	<b>26,060</b>	<b>100%</b>	<b>36,500</b>	<b>100%</b>

## Australian Almond Production



## 2009 Almond Production by Variety



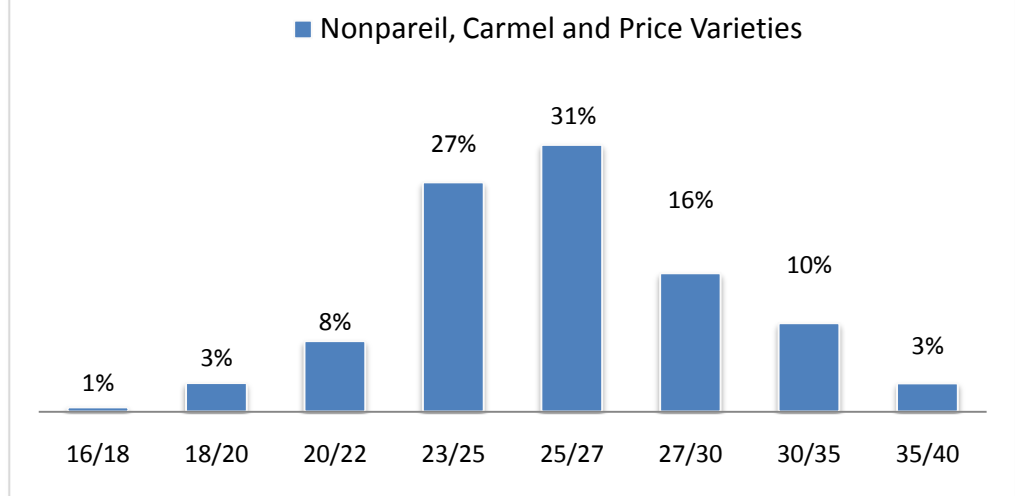
# Almond Sizing



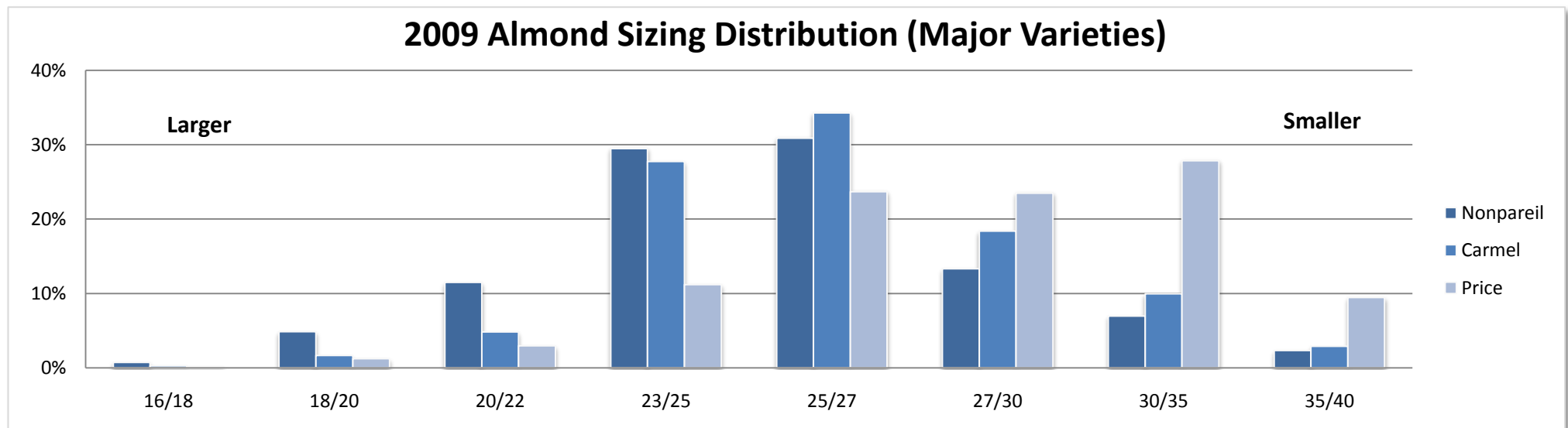
2009 Almond Sizing Distribution

VARIETY / SIZE	AVG COUNT	NONPAREIL	CARMEL	PRICE	WEIGHTED TOTAL
16/18	17.0	1%	0%	0%	1%
18/20	19.0	5%	2%	1%	3%
20/22	21.0	11%	5%	3%	8%
23/25	22.0	29%	28%	11%	27%
25/27	26.0	31%	34%	24%	31%
27/30	28.0	13%	18%	23%	16%
30/35	32.5	7%	10%	28%	10%
35/40	37.5	2%	3%	9%	3%
<b>TOTAL</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>AVERAGE SIZE</b>		<b>24.83</b>	<b>25.85</b>	<b>28.67</b>	<b>25.61</b>

2009 Almond Sizing Distribution



2009 Almond Sizing Distribution (Major Varieties)



# Almond Projections



## Australian Almond Projections

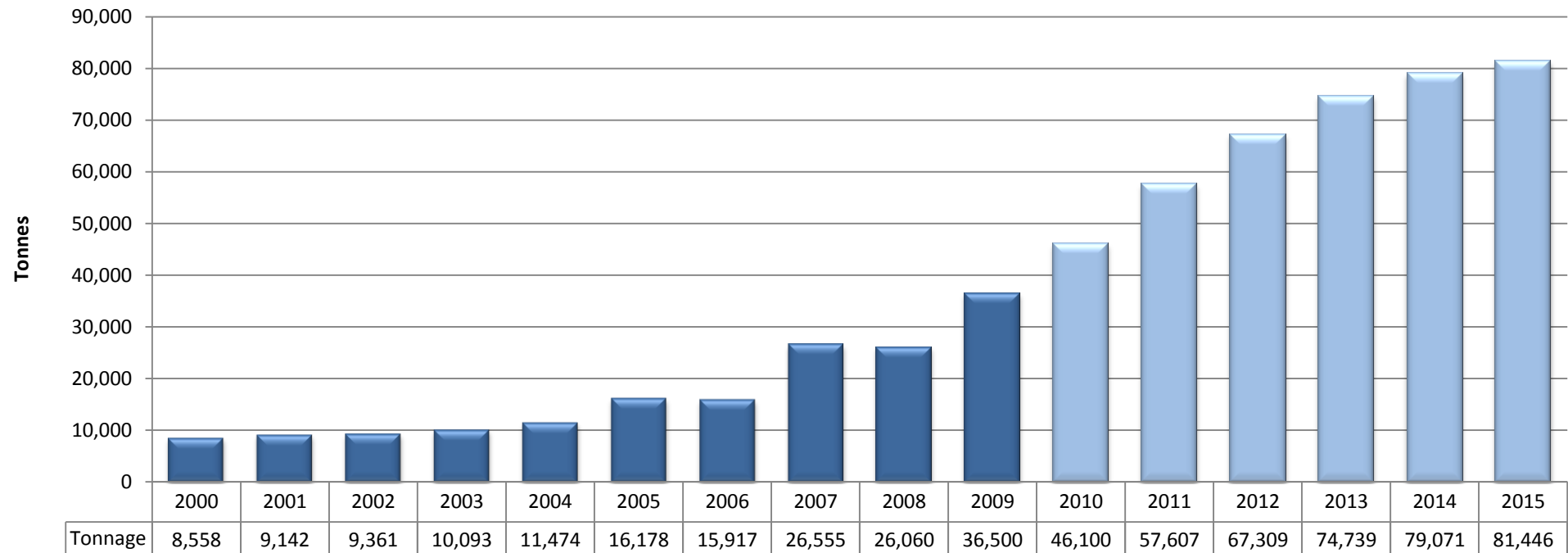
(based on current plantings only)

Bearing Plantings	2009	2010	2011	2012	2013	2014	2015	2016	2017
Hectares	18,668	25,546	27,277	27,678	27,678	27,678	27,678	27,678	27,678
Acres	46,129	63,125	67,402	68,394	68,394	68,394	68,394	68,394	68,394
Production, Tonnes	36,500	46,100	57,607	67,309	74,793	79,071	81,446	81,973	82,073
Value, \$m	\$256	\$319	\$403	\$471	\$523	\$553	\$570	\$574	\$575

## Industry Average Production Factors

Tree Age (Yrs)	Tonnes/Acre	Tonnes/Hectare
8+	1.20	2.97
7	1.10	2.72
6	1.00	2.47
5	0.75	1.85
4	0.55	1.36
3	0.20	0.49
2	0.00	0.00
1	0.00	0.00
Planting	0.00	0.00

## Australian Almond Production (Actual and Projected)



# Almond Exports

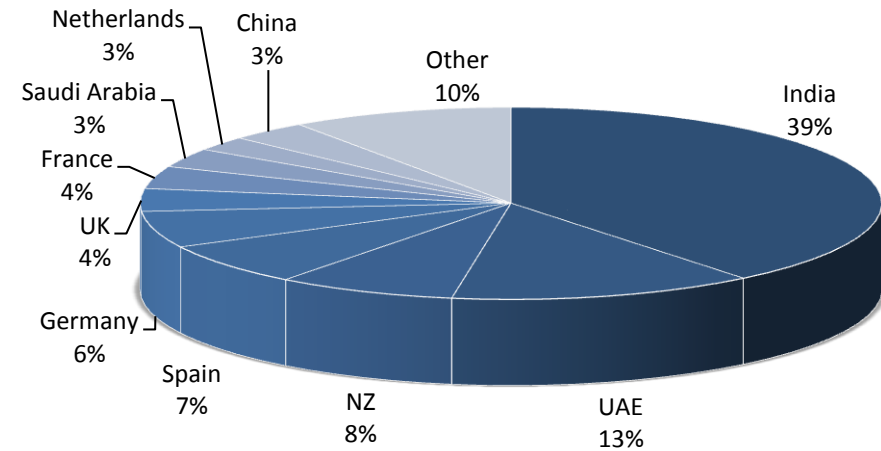


## Australian Almond Exports 2008/09

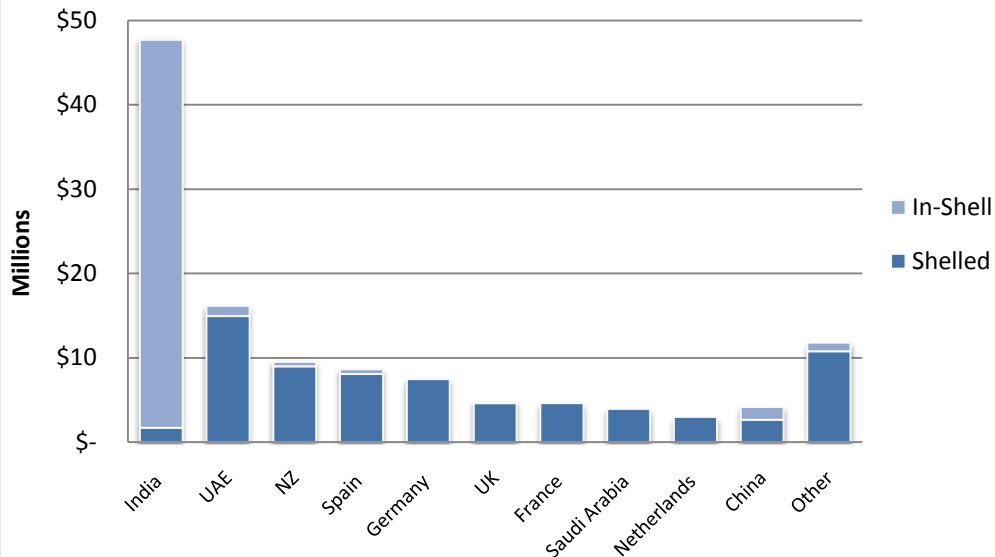
Top 10 Export Markets	Shelled (Kg)	AU\$ Value	In-Shell (Kg)	AU\$ Value	Total AU\$ Value
India	341,470	\$1,691,385	12,491,814	\$45,999,849	\$47,691,234
UAE	3,099,894	\$14,934,012	271,482	\$1,223,187	\$16,157,199
NZ	1,345,837	\$8,984,122	178,950	\$519,689	\$9,503,811
Spain	1,822,180	\$8,062,013	128,783	\$547,289	\$8,609,302
Germany	1,321,737	\$7,469,073			\$7,469,073
UK	751,694	\$4,617,357	10,659	\$21,124	\$4,638,481
France	1,031,634	\$4,604,853			\$4,604,853
Saudi Arabia	851,359	\$3,921,470			\$3,921,470
Netherlands	576,714	\$2,959,997			\$2,959,997
China	481,946	\$2,648,221	431,800	\$1,510,043	\$4,158,264
Other	2,098,800	\$10,760,307	196,801	\$1,028,398	\$11,788,705
<b>Total Exports</b>	<b>13,723,266</b>	<b>\$70,652,810</b>	<b>13,710,289</b>	<b>\$50,849,579</b>	<b>\$121,502,389</b>

Source: ABS

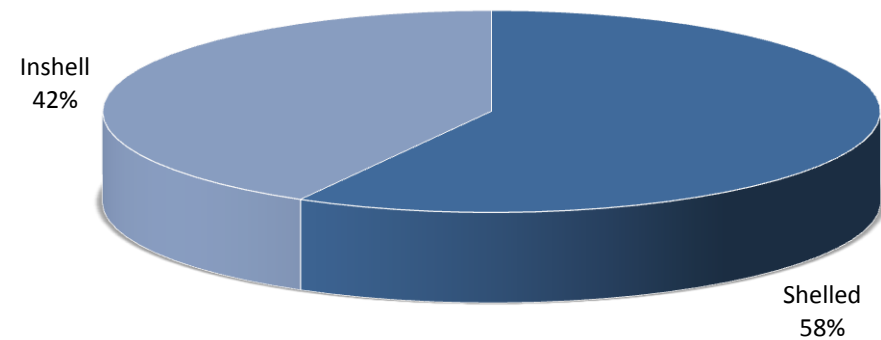
## 2008/09 Almond Exports (Value)



## 2008/09 Almond Exports (Value)



## 2008/09 Almond Exports (Value)



# Global Almonds



## Commercial Almond Production in Major Producing Countries

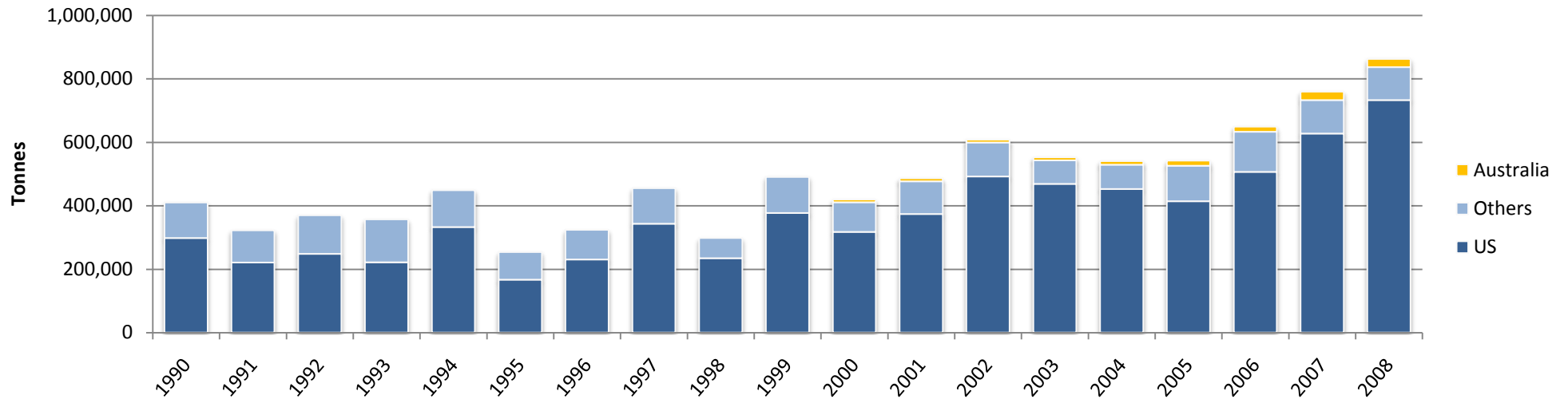
YEAR	AUS		CHINA		CHILE		GREECE		INDIA		ITALY		SPAIN		TURKEY		USA		TOTAL		% USA	% AUS
	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	lbs (mill)	Tonnes	%	%
1990	0.0	0	0.0	0	0.0	0	34.2	15,500	0.0	0	41.9	19,000	137.8	62,500	33.1	15,000	656.1	297,602	903.0	409,602	72.66%	0.00%
1991	0.0	0	0.0	0	0.0	0	24.3	11,000	0.0	0	24.3	11,000	142.2	64,500	33.7	15,300	485.9	220,401	710.3	322,201	68.40%	0.00%
1992	0.0	0	0.0	0	0.0	0	35.3	16,000	0.0	0	39.7	18,000	158.7	72,000	34.6	15,700	545.9	247,616	814.2	369,316	67.05%	0.00%
1993	0.0	0	0.0	0	0.0	0	44.1	20,000	0.0	0	33.1	15,000	185.2	84,000	35.3	16,000	488.2	221,444	785.8	356,444	62.13%	0.00%
1994	0.0	0	0.0	0	0.0	0	35.3	16,000	0.0	0	30.9	14,000	154.9	70,260	34.6	15,700	732.9	332,438	988.5	448,398	74.14%	0.00%
1995	0.0	0	0.0	0	0.0	0	28.7	13,000	0.0	0	33.1	15,000	99.9	45,300	30.2	13,700	366.7	166,332	558.5	253,332	65.66%	0.00%
1996	0.0	0	0.0	0	0.0	0	28.2	12,800	0.0	0	13.2	6,000	132.3	60,000	31.5	14,300	507.5	230,198	712.8	323,298	71.20%	0.00%
1997	0.0	0	0.0	0	0.0	0	32.0	14,500	0.0	0	24.3	11,000	165.3	75,000	24.3	11,000	756.5	343,143	1,002.3	454,643	75.48%	0.00%
1998	0.0	0	0.0	0	0.0	0	26.5	12,000	0.0	0	19.8	9,000	66.1	30,000	26.5	12,000	517.0	234,507	655.9	297,507	78.82%	0.00%
1999	0.0	0	0.0	0	0.0	0	37.5	17,000	0.0	0	37.5	17,000	145.5	66,000	30.9	14,000	829.9	376,436	1,081.2	490,436	76.76%	0.00%
2000	18.9	8,558	0.0	0	0.0	0	34.2	15,513	0.0	0	22.0	9,979	116.8	52,980	34.2	15,513	698.4	316,789	924.5	419,331	75.55%	2.04%
2001	20.2	9,142	0.0	0	0.0	0	28.7	13,018	2.2	998	39.7	18,008	125.7	57,017	30.9	14,016	824.1	373,805	1,071.5	486,004	76.91%	1.88%
2002	20.6	9,361	0.0	0	0.0	0	37.5	17,010	2.4	1,089	19.8	8,981	145.5	65,998	30.9	14,016	1,083.7	491,558	1,340.4	608,012	80.85%	1.54%
2003	22.3	10,093	0.0	0	0.0	0	22.0	9,979	2.2	998	11.0	4,990	97.0	43,998	30.2	13,698	1,032.9	468,516	1,217.6	552,272	84.83%	1.83%
2004	25.3	11,474	0.2	91	16.5	7,500	37.5	17,000	2.4	1,089	26.5	12,000	57.7	26,181	27.1	12,300	998.0	452,685	1,191.2	540,319	83.78%	2.12%
2005	35.7	16,178	2.2	1,000	15.4	7,003	30.9	14,016	2.5	1,152	26.5	12,000	140.0	63,484	30.2	13,698	911.7	413,540	1,195.1	542,072	76.29%	2.98%
2006	35.1	15,917	0.4	200	15.2	6,913	33.1	15,014	2.6	1,197	13.2	6,000	182.0	82,554	31.7	14,400	1,116.7	506,527	1,430.2	648,721	78.08%	2.45%
2007	58.5	26,555	2.9	1,334	19.4	8,818	22.0	9,997	2.2	1,016	26.5	12,038	125.0	56,717	34.2	15,513	1,383.0	627,318	1,674.0	759,306	82.62%	3.50%
2008	57.5	26,060	0.9	408	20.9	9,480	26.5	12,020	2.6	1,179	26.5	12,020	116.0	52,617	35.3	16,012	1,614.6	732,370	1,900.8	862,167	84.95%	3.02%

Source: ABC, UDSA

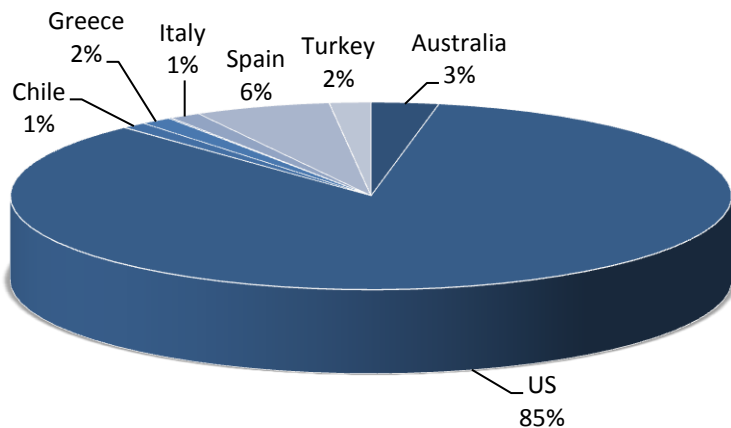
# Global Almonds



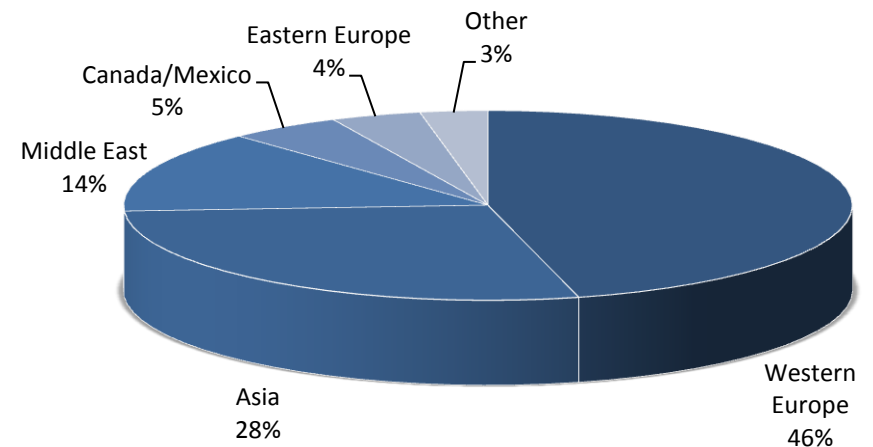
## Australia's Contribution to Global Almond Production



## World Almond Production 2008



## US Almond Exports 2008/09





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