



AUSTRALIAN  
ALMONDS

# *Australian Almond Statistics*

2010 Report





# Introduction

Introduction	2
Almond Overview	3
Almond Plantings	4
Almond Production	6
Almond Sizing	7
Almond Projections	8
Almond Exports	9
Global Almonds	10

## Data Collection

In 2005, the Almond Board of Australia (ABA) embarked on an Industry Statistics Collection Program to facilitate the dissemination 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 current 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.**

## Results

Total Australian almond plantings are estimated at 29,500 hectares (72,896 acres), being a 5% increase over 2009's acreage of 27,903 hectares (68,950 acres). Detailed survey data totals 29,200 hectares (71,826 acres), comprising 10,339 bearing hectares (25,548 acres) and non-bearing plantings of 1,478 hectares (3,652 acres). Consequently bearing plantings equate to 87% of total plantings.

Nonpareil continues to be the most predominant variety, comprising just over half of total plantings, followed by Carmel and Price varieties.

## Acknowledgements

The Almond Board of Australia wishes to extend appreciation to all 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.

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The 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 industry body, the Almond Board of Australia 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.

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).

## Procedure

The source of planting data summarised in this report is an Almond Planting Survey, distributed to all known Australian almond growers. More than 170 surveys were distributed in September 2010.

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

Greater than 95% survey response was received in 2010. It is currently estimated that the remaining 5% collectively represents approximately 300 hectares (740 acres) of almond plantings, being approximately 1% of total plantings.



## Demand for Almonds

- 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 more than doubled over the past decade from nearly 291,000 tonnes in 1998 to 583,000 tonnes in 2008.
- This demand growth trend is expected to continue, being led by dominant world producer, California, where the value of almonds exceeds US\$2.3 billion.
- Almonds are California's largest agricultural export and the major US horticultural export, valued at greater than US\$1.9 billion.

## Industry Growth

- The Australian almond industry is undergoing rapid expansion, to become one of the fastest growing horticulture sectors in Australia.
- On a percentage basis, Australia is the fastest growing almond industry in the world.
- Australia currently produces around 3% of world almonds, heavily dominated by California (82%).
- It is forecast that Australia will surpass Spain (8%) to become the world's second largest almond producer within the decade.

## Growing Regions

Australian almonds are predominantly grown across four Australian states:

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

Australia has five major almond growing regions:

- Adelaide
- Riverland
- Riverina
- Sunraysia
- WA



## Value of Almonds

- The industry has a current farmgate value of greater than \$250 million, with related exports of \$98 million.
- Additional production from newly planted orchards is expected to increase the industry's value to \$600 million by 2016.
- The growing, harvesting, transporting, storage, processing, value adding and marketing of almonds is a major contributor to the economic and social wellbeing of the regional production areas.

## Almond Plantings

- Total Australian almond acreage has increased more than six-fold over the past ten years: from 4,595 hectares (11,352 acres) in 2000 to more than 29,200 hectares (71,826 acres) in 2010.
- Approximately one quarter of Australian almond plantings have reached full maturity (eight years and older). 13% of Australian almond plantings are non-bearing (less than three years).
- 90% of almond plantings are drip irrigated, with less than 10% of plantings being sprinkler irrigated.

## Almond Production

- Australian almond production in 2010 totalled 38,370 tonnes (kernel).
- Future production increases will occur as young plantings reach full maturity, bringing productive capacity to more than 86,500 tonnes by 2017, more than two-fold increase over 2010 almond 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.

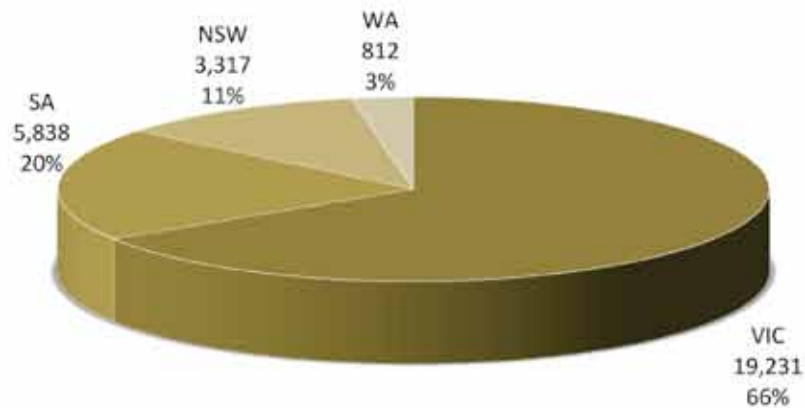


# Almond Plantings

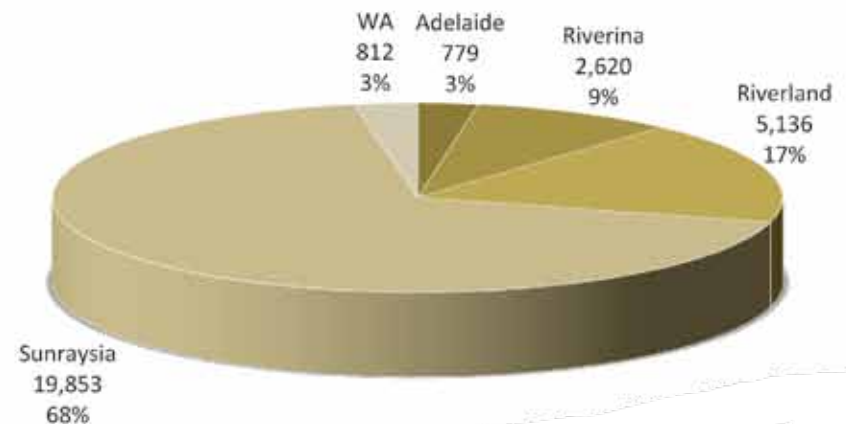
## Almond Plantings by Variety (Hectares)

Variety	Pre 2002	2002	2003	2004	2005	2006	2007	2008	2009	2010	Bearing	Non-B	Total	%
Baxendale	88										88	0	88	0%
Butte	0					3	35	3			38	3	41	0%
Carmel	1,502	177	505	799	809	1,905	2,399	651	99	444	8,097	1,194	9,291	32%
Fritz	116										116	0	116	0%
Johnston	33					0				0	34	0	34	0%
Keane	30	5	17	8		4	14	5	2	1	77	8	85	0%
Mission	103										103	0	103	0%
Monterey	0	7	1	6	15	66	68	15	66	77	163	158	322	1%
Ne Plus	242		1	0	0	0					243	0	243	1%
Nonpareil	3,095	324	828	1,221	1,264	2,787	3,431	937	244	668	12,950	1,849	14,799	51%
Other	48	1	0	2	0	0	1	0	0	0	53	0	53	0%
Padre	0					3	35	3			38	3	41	0%
Peerless	208	23	29	31	24	54	53	9	2		421	10	431	1%
Price	558	75	230	289	363	740	871	273	14	140	3,126	426	3,552	12%
<b>TOTAL</b>	<b>6,023</b>	<b>612</b>	<b>1,611</b>	<b>2,356</b>	<b>2,475</b>	<b>5,563</b>	<b>6,907</b>	<b>1,895</b>	<b>427</b>	<b>1,330</b>	<b>25,547</b>	<b>3,651</b>	<b>29,199</b>	<b>100%</b>
%	21%	2%	6%	8%	8%	19%	24%	6%	1%	5%	87%	13%	100%	

## Almond Hectares by State



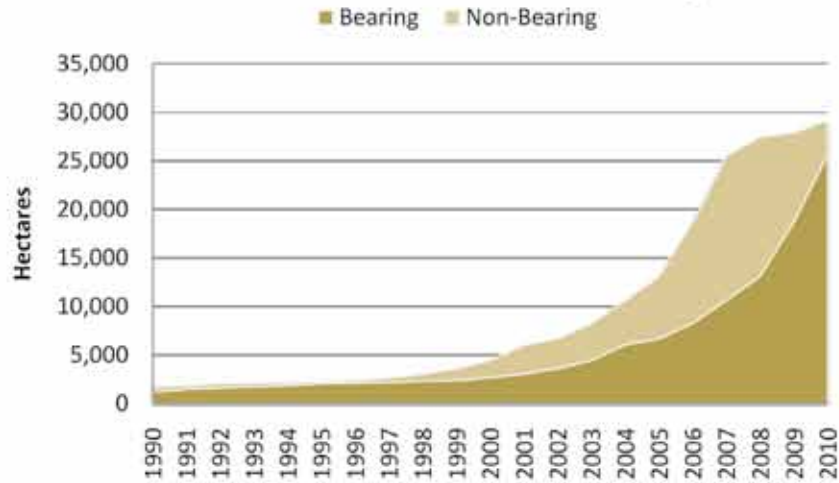
## Almond Hectares by Region



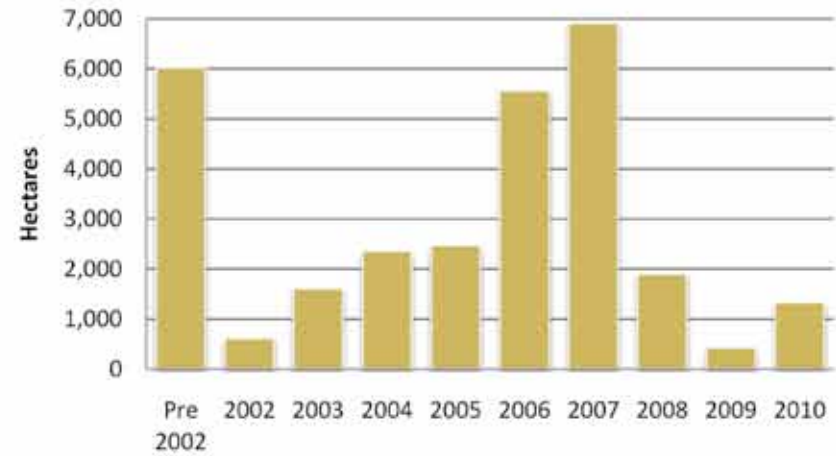
# Almond Plantings



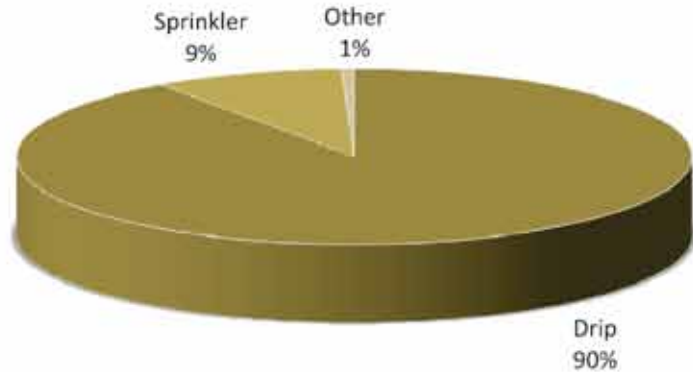
## Australian Almond Plantings



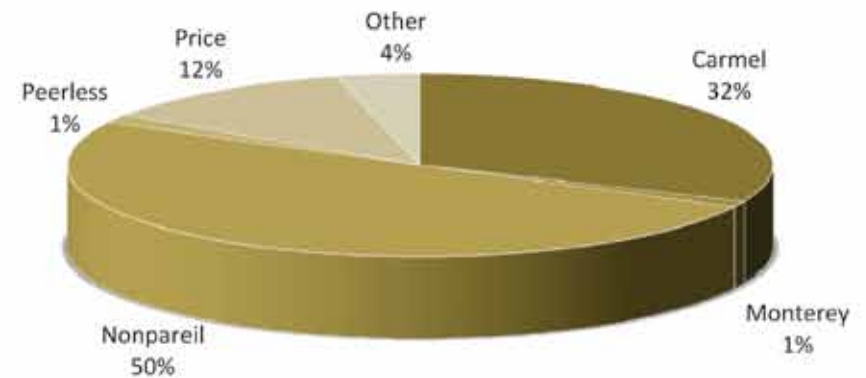
## Age Distribution of Plantings



## Almond Plantings by Irrigation



## Almond Plantings by Variety



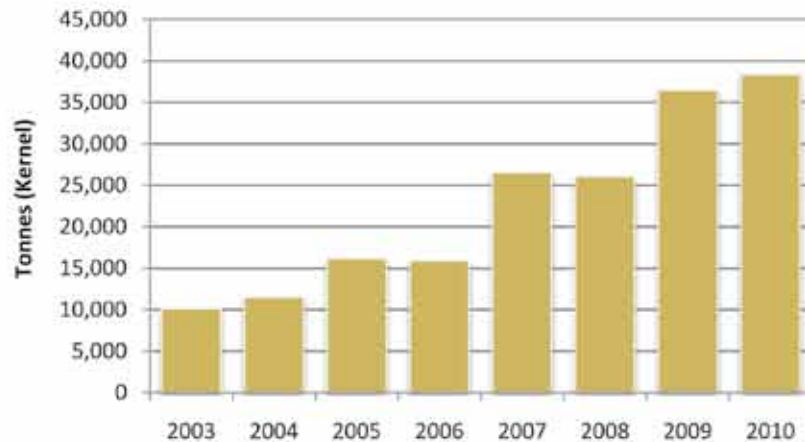


# Almond Production

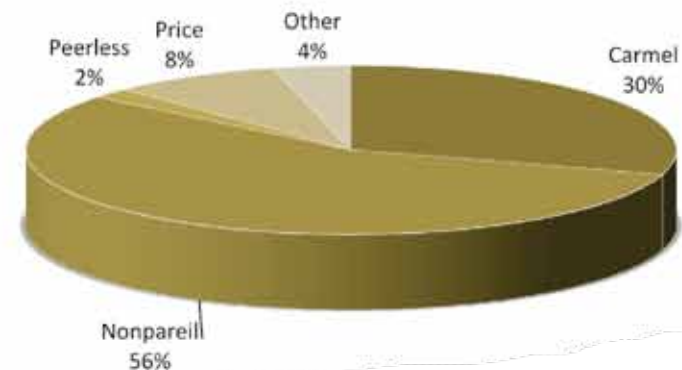
## Almond Production by Variety (Tonnes Kernel)

Variety	2002		2003		2004		2005		2006		2007		2008		2009		2010	
Baxendale	250	3%	221	2%	189	2%	210	1%	163	1%	230	2%	168	1%	173	0%	159	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	31%	11,401	30%
Chellaston	51	1%	43	0%	43	0%	42	0%	59	0%	62	0%	23	0%	33	0%	17	0%
Fritz	284	3%	309	3%	288	3%	321	2%	249	2%	331	1%	240	1%	151	0%	199	1%
Johnston	23	0%	24	0%	20	0%	16	0%	30	0%	36	0%	35	0%	47	0%	24	0%
Keane	46	0%	56	2%	62	1%	79	0%	112	1%	132	0%	70	0%	69	0%	79	0%
Mission	322	3%	325	3%	293	3%	333	2%	273	2%	314	1%	250	1%	196	1%	155	0%
Monterey	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	42	0%	97	0%	181	0%
Ne Plus	585	6%	635	6%	593	5%	616	4%	594	4%	823	3%	527	2%	443	1%	424	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%	21,496	56%
Peerless	340	4%	384	4%	558	5%	466	3%	491	3%	609	2%	597	2%	693	2%	750	2%
Price	318	3%	399	4%	474	4%	936	6%	903	6%	2,037	8%	2,338	9%	4,023	11%	3,236	8%
Other*	300	3%	429	4%	442	4%	660	4%	802	5%	848	3%	342	1%	209	1%	223	1%
<b>TOTAL</b>	<b>9,361</b>	<b>100%</b>	<b>10,094</b>	<b>100%</b>	<b>11,473</b>	<b>100%</b>	<b>16,177</b>	<b>100%</b>	<b>15,911</b>	<b>100%</b>	<b>26,556</b>	<b>100%</b>	<b>26,058</b>	<b>100%</b>	<b>36,501</b>	<b>100%</b>	<b>38,344</b>	<b>100%</b>

## Australian Almond Production



## 2010 Almond Production by Variety



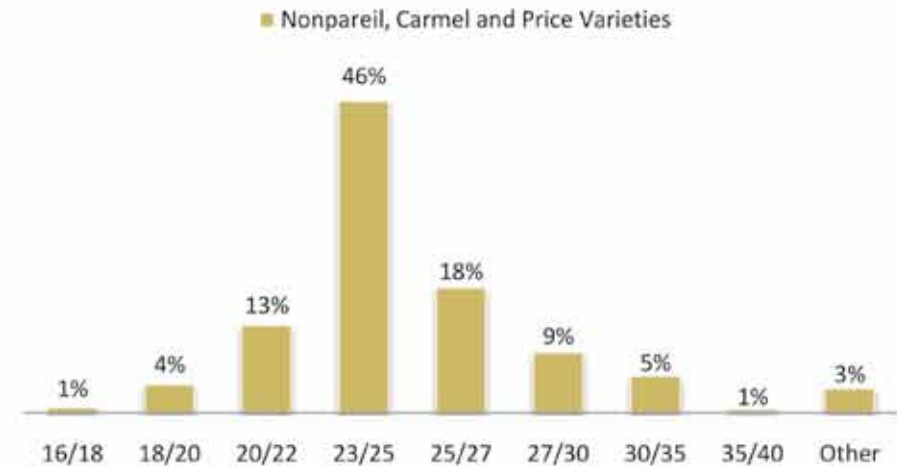
# Almond Production



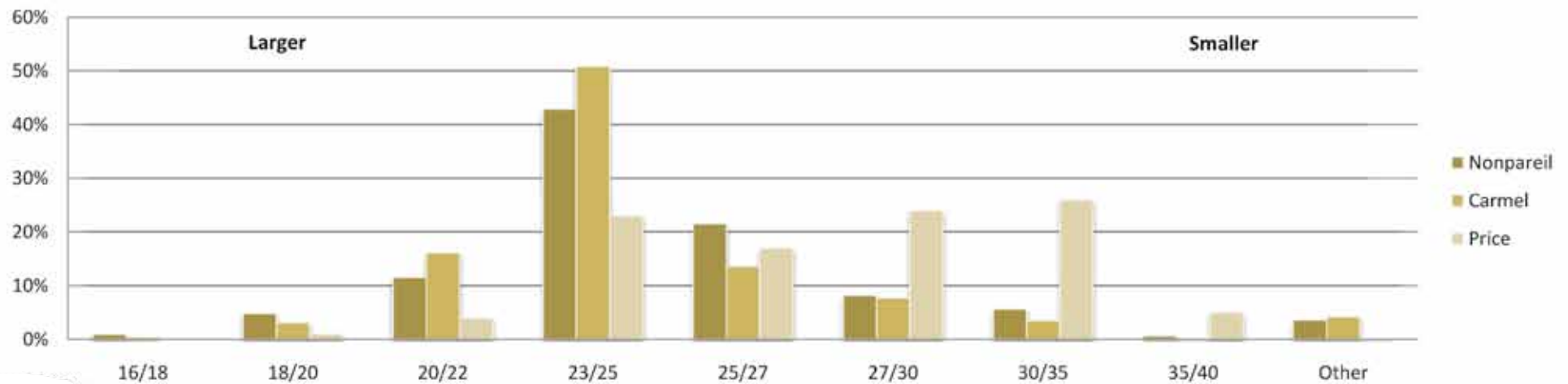
### 2010 Almond Sizing Distribution

VARIETY / SIZE	AVG	NONPAREIL	CARMEL	PRICE	TOTAL
16/18	17	1%	0%	0%	%
18/20	19	5%	3%	1%	4%
20/22	21	12%	16%	4%	13%
23/25	22	42%	51%	23%	46%
25/27	26	21%	14%	17%	17%
27/30	28	8%	8%	24%	9%
30/35	32.5	6%	4%	26%	5%
35/40	37.5	1%	0%	5%	1%
Other	-	4%	4%	0%	4%
<b>TOTAL</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

### 2010 Almond Sizing Distribution



### 2010 Almond Sizing Distribution (Major Varieties)





# Almond Projections

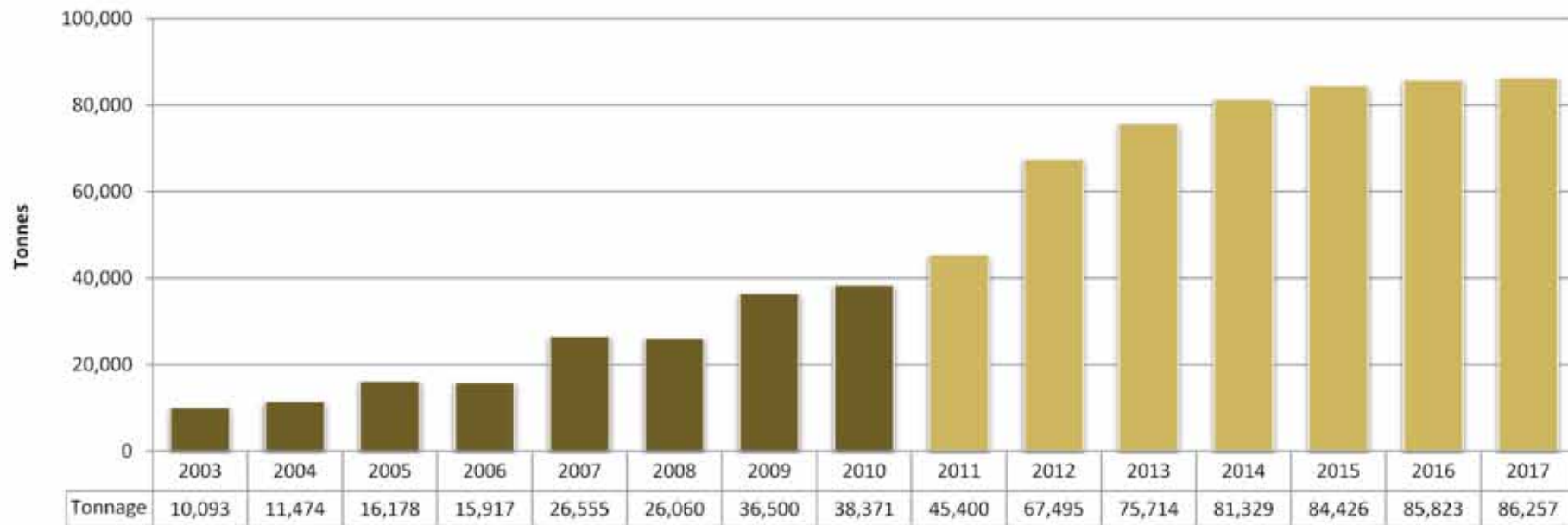
**Australian Almond Projections** (based on current plantings only)

Bearing Plantings	2008	2009	2010	2011	2012	2013	2014	2015	2016
Hectares	13,281	18,668	25,548	27,440	27,870	29,200	29,200	29,200	29,200
Acres	32,818	46,130	63,130	67,806	68,868	72,155	72,155	72,155	72,155
Production, Tonnes	26,060	36,500	38,371	45,400	67,495	75,714	81,329	84,426	85,823
Value, \$m	\$182	\$256	\$269	\$318	\$472	\$530	\$569	\$591	\$601

**Industry 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 Projections**



# Almond Exports



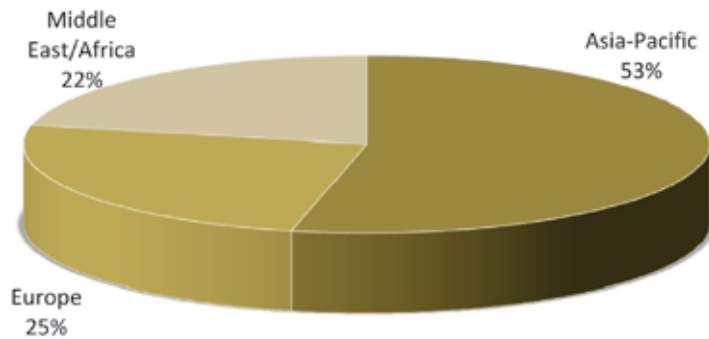
## Australian Almond Exports 2009/10

Top 10 Export Destinations	In-Shell (Kg)	AUS Value	Shelled (Kg)	AUS Value	Total AUS Value
India	8,122,842	\$33,286,746	504,237	\$2,884,236	\$36,170,982
UAE	0	0	1,728,591	\$10,055,394	\$10,055,394
New Zealand	240	\$20,084	1,123,482	\$8,567,482	\$8,587,566
Germany	0	0	918,058	\$5,548,933	\$5,548,933
United Kingdom	0	0	779,007	\$4,539,317	\$4,539,317
Spain	17,000	\$84,899	952,559	\$3,865,465	\$3,950,364
Pakistan	0	0	575,805	\$3,491,766	\$3,491,766
Hong Kong	215,460	\$787,539	469,109	\$2,528,051	\$3,315,590
Saudi Arabia	0	0	418,872	\$2,627,853	\$2,627,853
France	0	0	520,252	\$2,838,136	\$2,838,136
Other	113,402	\$616,799	2,855,430	\$16,098,012	\$16,714,811
<b>Total</b>	<b>8,468,944</b>	<b>\$34,796,067</b>	<b>10,845,402</b>	<b>\$63,044,645</b>	<b>\$97,840,712</b>

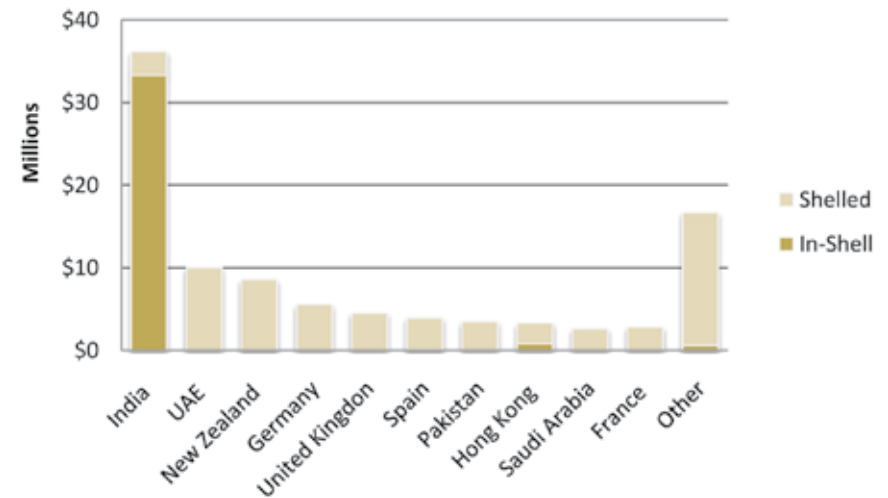
## 2009/10 Almond Exports (Value)



## Almond Exports by Region 2009/10



## 2009/10 Almond Exports (Value)



Source: ABS



# Global Almonds

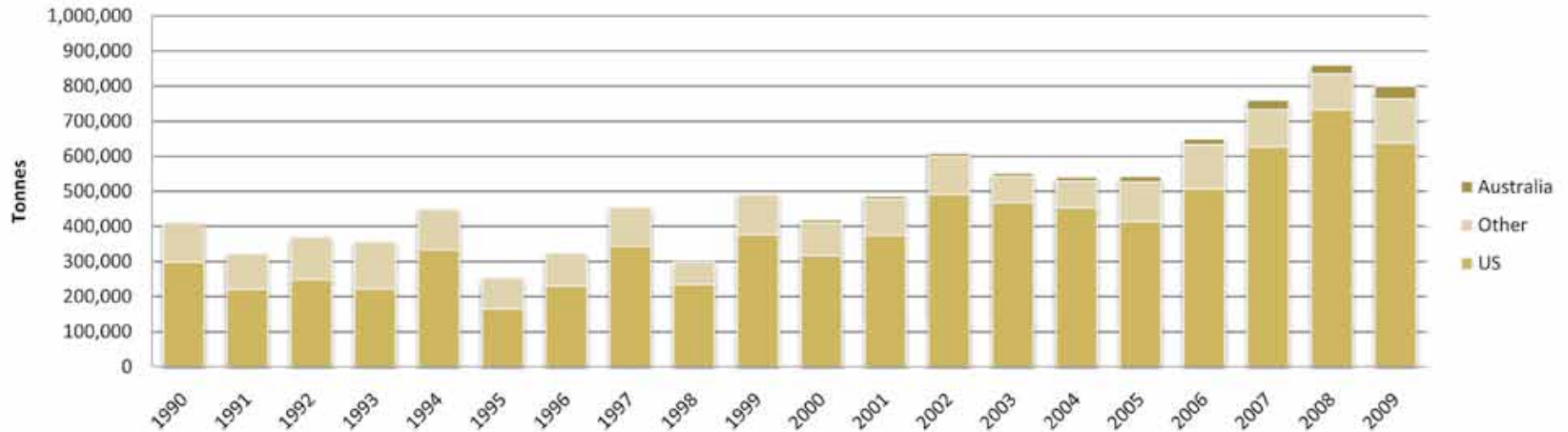
## Global Almond Production

YEAR	AUS		CHILE		CHINA		GREECE		INDIA		ITALY		SPAIN		TURKEY		US		TOTAL		% US	% AUS
	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	lbs (mil)	Tonnes	%	%
1990							34.2	15,513			41.9	19,006	137.8	62,505	33.1	15,014	656.0	297,557	903.0	409,595	72.65%	0.00%
1991							24.3	11,022			24.3	11,022	142.2	64,501	33.7	15,286	486.0	220,446	710.5	322,277	68.40%	0.00%
1992							35.3	16,012			39.7	18,008	158.7	71,985	34.6	15,694	546.0	247,661	814.3	369,360	67.05%	0.00%
1993							44.1	20,003			33.1	15,014	186.2	84,005	35.3	16,012	488.0	221,353	785.7	356,387	62.11%	0.00%
1994							35.3	16,012			30.9	14,016	154.9	70,261	34.6	15,694	733.0	332,483	988.7	448,467	74.14%	0.00%
1995							28.7	13,018			33.1	15,014	99.9	45,314	30.2	13,698	366.0	166,015	557.9	253,059	65.60%	0.00%
1996							28.2	12,791			13.2	5,987	132.3	60,010	31.5	14,288	508.0	230,425	713.2	323,501	71.23%	0.00%
1997							32.0	14,515			24.3	11,022	166.3	74,979	24.3	11,022	757.0	343,369	1,002.9	454,907	75.48%	0.00%
1998							26.5	12,020			19.8	8,981	66.1	29,982	26.5	12,020	517.0	234,507	655.9	297,510	78.82%	0.00%
1999							37.5	17,010			37.5	17,010	145.5	65,998	30.9	14,016	830.0	376,482	1,081.4	490,516	76.75%	0.00%
2000	18.9	8,573					34.2	15,513			22.0	9,979	116.8	52,980	34.2	15,513	698.4	316,789	924.5	419,347	75.54%	2.04%
2001	20.2	9,163					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	486,025	76.91%	1.89%
2002	20.6	9,344					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	607,996	80.85%	1.54%
2003	22.3	10,115					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	552,294	84.83%	1.83%
2004	25.3	11,476	16.5	7,484	0.2	91	37.5	17,010	2.4	1,089	26.5	12,020	57.7	26,172	27.1	12,292	998.0	452,685	1,191.2	540,319	83.78%	2.12%
2005	35.7	16,193	15.4	6,985	2.2	998	30.9	14,016	2.5	1,134	26.5	12,020	140.0	63,503	30.2	13,698	911.7	413,540	1,195.1	542,087	76.29%	2.99%
2006	35.1	15,921	15.2	6,895	0.4	181	33.1	15,014	2.6	1,179	13.2	5,987	182.0	82,554	31.7	14,379	1,116.7	506,527	1,430.0	648,638	78.09%	2.45%
2007	58.5	26,535	19.4	8,800	2.9	1,315	22.0	9,979	2.2	998	26.5	12,020	125.4	56,880	34.2	15,513	1,383.0	627,318	1,674.1	759,358	82.61%	3.49%
2008	57.5	26,082	17.6	7,983	0.9	408	22.0	9,979	2.6	1,179	26.5	12,020	120.3	54,567	35.3	16,012	1,614.6	732,370	1,897.3	860,600	85.10%	3.03%
2009	60.5	36,514	14.3	6,486	3.3	1,497	18.7	8,482	2.6	1,179	13.2	5,987	188.5	85,502	35.3	16,012	1,405.9	637,706	1,762.3	799,365	79.78%	4.57%

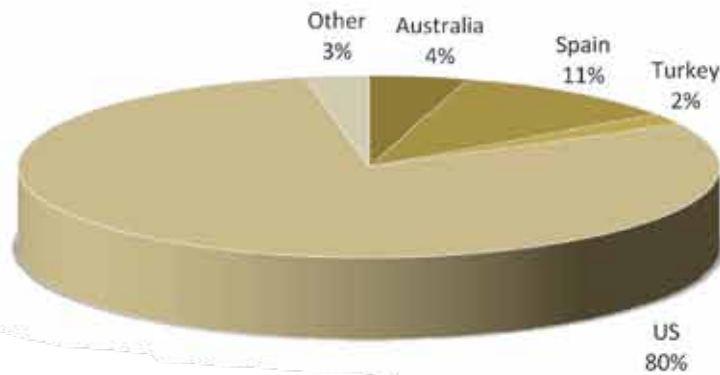
Source: ABC, USDA



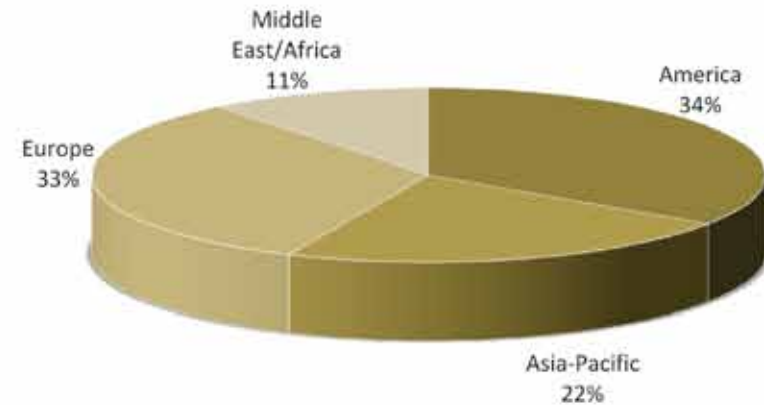
## Australia's Contribution to Global Almond Production



## Global Almond Production 2009



## 2009/10 US Almond Sales by Region





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