

Final Report

Almond Industry Statistics and Data Collection 2017-2019

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Ross Skinner

Delivery partner:

Almond Board of Australia

Project code:

AL16003

Project:

Almond Industry Statistics and Data Collection 2017-2019 AL16003

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Summary

This project underpins the industry's statistics collection and dissemination program, which is critical in developing and implementing industry strategies to maximise the competitiveness of the Australian almond industry. Australia is the world's second largest producer supplying 6% of the global crop of almonds but well behind the US who produces 80%. The Almond Board of Australia (ABA) represents 99% of Australia's rapidly expanding almond production, processing and marketing sectors. This project has funded the provision of statistics during a particularly dynamic period for the industry and has facilitated the cohesive development of the industry.

Data is sourced from industry contacts (both domestic and international) and from the Australian government. The data is updated regularly to maintain a current industry database. It is collated, formatted and analysed by ABA staff before presentation to the ABA Board and Committee members who provide further insights based on the statistics. The reports are distributed to all industry members and the wider community, including government and Hort Innovation.

Relevant data and statistics are distributed by the following means:

- board and Committee briefing notes
- quarterly newsletter (*In A Nutshell*)
- e-blasts, media releases
- monthly email news (*Almond Bytes*)
- monthly position reports
- annual *Almond Insights* publication
- crop forecast reports
- industry ABA website and those of other industry participants
- social media
- presentations to various industry stakeholder forums.

Industry statistics collection and distribution activities link closely to the CEO, Market Development Manager, and Industry Development staff roles, who undertake liaison with multinational corporates through to small producers in providing business case information.

This close team co-operation combined with the knowledge sharing of industry producers, marketers, government bodies and international participants enables the ABA to efficiently source data. Much of this data is provided on a confidential basis for aggregation and release as a whole industry statistic. By producing this information, Australian industry members are well positioned to make informed decisions.

A prime example of this has been the development of the industry's water policy that has sought and achieved a moratorium on the issuing of new water use licences until a review of water deliverability was undertaken. The expansion of the almond industry in the Southern Basin from 30,000 hectares in 2016 to nearly 50,000 hectares in 2019 brought into question water input surety for all irrigators, given the further draw of 280 gigalitres for irrigation once these new orchards matured. An understanding of the industry's growth path is also driving the market development strategies of the industry, as the current productive capacity of the industry will double to 160,000 tonnes during the period 2018 to 2026.

The extensive and trusted relationships developed by the ABA facilitates access to confidential data. These relationships aid both the collection of reliable information and the development and implementation of the ABA's Australian Almond Industry Strategic Plan.

This project has built and continuously improves data initiatives for the almond industry. This improvement is guided by the ABA Board and Market Development Committee that meet quarterly and are key users of the data and analysis reports. The following improvements have been implemented during the period of this project:

- ensuring industry statistics are up to date by moving from quarterly to monthly shipment reports
- aligning the formatting of the shipment report to that of the Almond Board of California report to facilitate ease of comparison
- provision of price comparison with other nut varieties to assess risk of product substitution
- developing infographics for the annual almond industry statistics report *Almond Insights*
- assessing future water, bee, nutrient and processing capacity requirements based on plantings data
- monitoring planned developments in addition to actual planted orchard data
- collecting annual yield data from major producers to revise industry average yield tonnages for crop predictions.

Keywords

Almond industry; statistics; information distribution; production; crop; export; position report.

Introduction

The Australian almond industry is a dynamic one having grown from producing 8,558 tonnes in 2000 to 103,700 in 2019. Plantings have increased from 5,951 hectares in 2000 to just under 50,000 hectares in 2019. These production related statistics lead onto challenges for the industry in terms of input surety and market development.

This project has provided key data and analysis during a period of rapid growth of 20,000 hectares from 2016 to 2019. These plantings will deliver an additional 64,000 tonnes of production requiring processing and marketing and will need a further 280 gigalitres of water and 120,000 bee hives. The monitoring of where this development is occurring also has implications for input requirements.

This project links with the AL16000 “Almond Industry Communications Programme”, AL16001 “Australian Almond Industry Innovation and Adoption Program”, AL16700 “Australian Almond Industry Conferences and Field Days 2017 – 2021”, and AL16701 “Almond Study Tour (International Networking)”.

A major component of this project is the annual Australian almond grower survey, capturing current plantings information (new plantings, removals), variety, state, region, tree spacings, irrigation type and pollination requirements.

The project also covers as a key deliverable, production and sales both domestically and internationally which is crucial to the strategic planning of industry stakeholders. Information is provided to Hort Innovation for their Strategic R&D Investment Plan with crop figures and estimates used for annual investment planning and the benefit cost evaluations.

The ABA’s industry database has been designed to store and report statistical data. Reports from this data are aggregated and published in the Almond industry publication *Almond Insights*. This publication includes information on almond plantings, production, sales and consumption. This industry overview provides production by tonnes, state, region and variety and a forecast of future crops.

Production and sales data is collected from almond processors/marketers, with this data recorded in tonnes for domestic and international sales in kernel and inshell product. This information is supplemented by analysis of Australian Bureau of Statistics (ABS) data relating to almond exports by volume and value.

The ABA is well positioned to undertake industry statistics and data collection through the relationship with industry growers, processors and marketers and international connections. The database aids with the gathering and dissemination of industry information and statistics.

Methodology

The structure of the industry facilitates an effective data collection and dissemination program, providing the foundation for the industry statistical communication activities. The information requirements are routinely reviewed with revised reporting formats and analysis to ensure accuracy and relevance.

Our industry marketers sit on the ABA’s Market Development Committee (MDC) and the four major marketers are represented on the ABA Board of Directors. The Board also has seven grower Directors representing the growing regions and chairing Committees covering Production, Water, Pollination, and Planting Material. The ABA also has a Processing Committee. The Board, MDC, and ABA staff oversee the industry’s statistical requirements from the following perspectives:

- plantings (domestic and international)
- orchard technologies (varieties, rootstocks, irrigation system, hives)
- production and end of year inventory (domestic by region and international)
- forecast supply (domestic by region and international)
- demand (domestic and international sales and shipments by volume and value)

- domestic imports
- crop quality parameters
- pricing (almond grades and other nuts)
- product developments
- input requirements current and in future (water, power, bees, nutrition, labour, chemicals, transport, waste packaging recycling)
- processing capacity and biomass byproduct.

The ABA is uniquely equipped to collect, collate and analyse industry data, much of which is provided on a confidential basis from parties who trust the ABA following nearly two decades of relationship building.

The initial analysis of the data is undertaken by:

- the ABA CEO, Ross Skinner B. Ec., who has 39 years experience in horticulture involved in strategic planning and industry development
- the ABA Market Development Manager, Joseph Ebbage, who has been a member of the Australian Market and Social Research Society for more than 15 years and has been awarded the senior industry rating of 'Qualified Practising Market Researcher' by the Society.

This project's data is supplemented by market research information from Innova, Nielsen and specifically funded work undertaken to better understand both the domestic and export markets.

Industry Database – The database of industry statistical information has been developed and maintained over an extended period with continuous development. These improvements have enhanced data input and collection, report production and distribution.

Industry participant information is constantly updated. Information for this is collected from the ABA membership process and attendance at our conferences, forums, field days, trade forums and requests to be added. Reviews of the database are conducted three times per annum to ensure correct contact details are maintained.

The statistical data stored on the ABA database includes the Marketers' domestic and export sales, varietal production, crack out information, quality grades and regional production data. The Marketers' data is collated monthly on a confidential basis. This information is distributed as aggregated whole industry figures.

Data is also collected and collated from sources external to ABA membership including Australian Bureau of Statistics, Department of Agriculture and Water Resources, International Nut Council, Australian Nut Industry Council, Almond Board of California and United States Department of Agriculture.

Annual Almond Planting Survey – The Australian almond planting survey assesses almond plantings by age, variety, state, region, tree spacing, irrigation type and pollination needs. These surveys are distributed to all Australian almond growers containing preprinted data from previous updated planting surveys. However, if the planting is a new or different property, a new (blank) planting survey is supplied. All responses are updated annually, the data is then consolidated and industry yield averages for tree ages are used to determine future production estimates by industry, state, region and variety.

The ABA has been able to collect planned future orchard expansion from industry participants and bodies involved in the approval process. The aggregated data is provided to industry members, all levels of government, water authorities, investors, and suppliers. Forecasts of future supply benefit processing capacity considerations and market development planning.

Production based levy revenue estimates for the ABA and Hort Innovation can be produced with a high degree of accuracy. This survey is a major undertaking involving most ABA staff.

Annual Crop Estimates- Annual crop estimates are produced for the Australian almond industry. Subjective estimates provide an early indication of the coming crop after it has set, based on growers' seasonal outlooks provided to their industry processor/marketer. Further crop estimates are produced with one prior to harvest, one following receipt when crack out information is better known, and the last following the completion of hulling by all processors.

This data is disseminated as a whole of industry figure, including the 1,000 tonnes of non ABA member production,

[illegible]

Market trends are analysed and compared against that of the US almond industry. This information guides the industry's marketing program directed by the Market Development Committee.

Further analysis is provided prior to the Market Development Committee meetings. The members add their insight from their day to day involvement in the trading of almonds and other nuts.

The processors use these reports when reporting to their grower suppliers. The ABA also communicates with growers as well as traders, government, Hort Innovation, Australian Nut Industry Council, the Almond Board of California, and the broader community. Media releases are provided on industry planting information, crop forecasts, and sales. The information is also uploaded to the ABA website, provided by E-blast and circulated to the ABA's opt-in audience of domestic and international contacts.

Annual Almond Industry Statistics Report - *Almond Insights* details almond plantings, production by variety and size, imports, domestic and export sales, world production and consumption. Information is displayed in charts and tables, with infographics throughout. The booklet is printed and distributed on an annual basis.

The production and sales data are fundamental to this publication. Data is collected throughout the year from processors as is reported on a marketing year basis from March to February to align with the availability of the new crop.

Outputs

The outputs of this project are:

Maintenance of an industry database - The almond industry database holds sensitive information that is held in confidence. This information includes growers' almond plantings and domestic and export sales provided by processors/marketers. External data is obtained from the Department of Agriculture, Australian Bureau of Statistics, the Almond Board of California, International Nut Council, and the United States Department of Agriculture. This data is entered into the database monthly.

Food safety testing results – These are held separate to the industry database. This testing is completed and filed annually.

Market analysis reports x 4 – These are prepared by the CEO and Market Development Manager with input from Market Development Committee members.



The ABA CEO and Directors' presentations – These have been presented at major almond and nut conferences and trade and community forums utilising the project's data and analysis. - The Australian Almond Conference program is attached. (Appendix 1)

Development of a stakeholder engagement/communications plan at Milestone 102 - The engagement plan was developed and submitted at Milestone 102. (Appendix 2)

Annual planting survey - In August of 2017, 2018, and 2019 the planting surveys were distributed and the information entered, collated and reported.

Annual industry statistics report produced - Each year the *Almond Insights* publication has been produced and distributed. <https://industry.australianalmonds.com.au/almond-board/almond-insights/>

Annual industry crop forecast produced - The annual crop forecast is prepared and updated three times during the year and distributed to relevant industry participants and uploaded to the ABA website. <https://industry.australianalmonds.com.au/marketing/crop-update/>

Position report produced per quarter - The frequency of producing the position report was changed to monthly. These are distributed and uploaded. <https://industry.australianalmonds.com.au/marketing/export-position-reports/>

Media releases per year relating to crop estimate and statistical collection outcomes – The ABA Chair and CEO act as industry media contacts. The information derived from the statistical program is used in electronic and print media articles. Other industry members rely on the statistics produced by the ABA for their own media releases.

Program Logic and Monitoring and Evaluation plan with linkage to Hort Innovation and industry/fund objectives at Milestone 102 - This plan was developed and submitted at Milestone 102. (Appendix 2)

Program risk register and how risks will be managed at Milestone 102- This register was developed and submitted at Milestone 102. (Appendix 2)

Outcomes

This project enabled deeper insights into production and trade performance of Australian almonds. It has provided all Australian almond growers, processors/marketers, trade contacts, industry service providers and government agencies with pertinent information relating to almond industry plantings, production (current and future), sales, consumption and product information relevant to their business in a timely manner to enable better business decisions to be made.

The key outcomes of this project have been:

- providing up to date information supporting industry strategic planning and actions regarding current industry issues, including market development, new processing capacity and improved surety of inputs such as water and pollination services
- optimised returns to growers due to enhanced information for market analysis
- a well-informed industry community for the period 2017- 2019 facilitating sound business decisions
- an efficient contact management system
- a fact based understanding of the nature and value of the Australian almond industry in Government and the broader community
- improved mutually beneficial relationships with the Almond Board of California and the International Nut Council.

The short-term outcome of this project is responsible for improving knowledge regarding the industry statistics.

This project has contributed to improved strategic planning for the industry and implementation of plans and resource investment by a thorough understanding of supply, demand and market factors and trends. It has provided better business decisions, current viability and sustainability for the Australian almond industry.

The government and associated organisations to the almond industry have better information to address important issues such as water infrastructure, annual water use limits, and state allocation caps.

Suppliers have an accurate understanding of the future input needs of the industry including nursery trees, fertilizer, chemicals, water, on farm irrigation systems, harvesting equipment, pollination hives and processing equipment. Input surety is now better understood by almond producers and growers of other crops as well.

The annual plantings survey enabled the adoption of some key technologies of the R&D investment program to be measured such as the uptake of new varieties, rootstocks and orchard design.

Monitoring and evaluation

The project had a mid-term review as part of the project Monitoring and Evaluation (M&E) for statistical requirements of the Australian almond industry in addition to the continuous ongoing development of the industry's statistical program.

The statistical knowledge gained from this project is also communicated via AL16000 "Almond Industry Communications Programme", AL16001 "Australian Almond Industry Innovation and Adoption Program", AL16700 "Australian Almond Industry Conferences and Field Days 2017 – 2021", and AL16701 "Almond Study Tour (International Networking)".

Ongoing evaluation of the key project outputs occurs at each quarterly meeting of the Market Development Committee and the ABA Board. As prime users of the statistical information, this ensures the data and reports remain relevant and well presented.

The key outputs have been:

- media release distributed
- industry database updated from statistical and data collection activities
- crop estimates disseminated and uploaded to the ABA website
- monthly industry position reports disseminated and uploaded to the ABA website
- *Australian Almond Insights* publication prepared and printed.

The Almond Board of California provides a valuable guide on the structuring of reports. Their website and publications are carefully monitored for improvements that can be incorporated into the statistical program for the Australian almond industry. The M&E plan covers key evaluation questions, indicators and data collection methods and sources.

The monitoring & evaluation activities have been:

- review of data and reports by the ABA Board, Committees and staff
- continue to update the database and extend mailing / email lists for almond statistics reports and other key mail-outs to include other interested stakeholders e.g. government and all key wholesalers and media
- revisions of contact information will continue to be conducted annually to capture new and amended growers / levy payers and stakeholder details
- continual monitoring and evaluation of information to ensure data is accurate and consistent
- verification of planting survey responses with personal phone calls to ensure accuracy of data reported
- continue to develop the *Almond Insights* booklet to include new and relevant statistical analysis of the Australian and global almond industry in relation to production, consumption and sales data
- monitoring the uptake of media stories created from the distribution of the monthly position reports and crop forecasts through Meltwater.

Recommendations

Industry Position Reports released - In 2016, the quarterly Position Report was changed to a monthly report, aligning to the formatting of the report produced by the Almond Board of California to facilitate market analysis by the ABA Board of Directors and ABA Market Development Committee. Monthly position reports are compiled and distributed for almond export statistics with each report sent via eblast to an 'opt-in' mailing list.

Media monitoring upgraded – The ABA has upgraded the service provided by Meltwater in monitoring media.

Refereed scientific publications

None to report.

References

None to list.

Intellectual property, commercialisation and confidentiality

No project IP, project outputs, commercialisation or confidentiality issues to report.

Acknowledgements

The ABA Staff, Board and Committees facilitated the collection of information critical to this project and provided a monitoring of reporting format and insights valuable to the analysis of the data.

ABA Board of Directors

Almond Industry Market Development Committee Members

Almond Industry Processing Committee Members

Almond Industry Production Committee Members

Almond Industry Water Committee Members

Almond Industry Plant Material Committee Members

Almond Industry Pollination Committee Members

Almond Board of California

International Nut Council

Australian Nut Industry Council

Horticulture Australia Limited Staff

Appendices

1. Conference Programs
2. Milestone 102



Tuesday, October 30th

6:00pm Australian Almond Conference Welcome Function:
Pullman Lobby and Atrium Bar, Pullman Hotel

Sponsored by:



Wednesday, October 31st

8:00am	Conference Registration	Grand Atrium
8:30am	Almond Board of Australia Annual General Meeting	Neale Bennett - Chairman Ross Skinner - Chief Executive Officer
9:20am	Conference Registration, Morning Tea & Trade Exhibition Session	Grand Lobby
9:50am	Conference Opening	Neale Bennett and Peter Hayes
10:00am	Word from the Signature Sponsor	Trevor Dennis - Haifa
10:10am	Whole Almond Orchard Recycling and the Effect on Second Generation Tree Growth, Yield and Fertility	Dr. Brent Holtz - University of California
10:35am	Controlling Carpophilus Beetle	Paul Cunningham - Agriculture Victoria
10:55am	Carob Moth: The Forgotten Grub	Blair Grossman - Agriculture Victoria
11:10am	Practical Farm Processes to Conquer Orchard Pests	Scott McKenzie - Century Orchards
11:25am	California's Experience with Navel Orangeworm	David Haviland - University of California
11:50am	Sustainability: The California Almond Journey	Dr Jacqueline Edwards - Agriculture Victoria
12:10pm	Panel Discussion	Greg Buchanan - Almond Board of Australia
12:25pm	Word from the MC	Peter Hayes
12:30pm	Lunch & Trade Exhibition Session	Grand Lobby
1:30pm	Word from the Platinum Sponsor	Richard Emery - Stoller Australia
1:40pm	Market Access Challenges and being Trumped	Julie Adams - Almond Board Of California
2:10pm	The Indian Trade Strategy	Paul Myler - Department of Foreign Affairs and Trade.
2:40pm	Australian Free Trade Agreements	Chris Joyce - Australian Nut Industry Council
3:00pm	Afternoon Tea & Trade Exhibition Session	Grand Lobby
3:30pm	Navigating a Changing Australia	Bernard Salt - The Demographics Group
4:00pm	The Californian Almond Industry 2018 - 2025	Richard Waycott - Almond Board of California
4:25pm	Almonds, Other Horticultural Sectors and Consumers	Hayden Higgins - Rabobank
4:50pm	Word from the MC	Peter Hayes
5:00pm	Day Close	

Australian Almond Conference Dinner

6.30pm Pre-Dinner Canapes - **The Park** (Opposite the Pullman Hotel)
36 Lakeside Dr, Albert Park, Melbourne

7.00pm Sponsor Presentation, 2018 Almond Industry Hall of Fame Induction
& Entertainment by Dave O'Neil



Session Sponsor
HAIFA Group

Session Sponsor
STOLLER Australia

Session Sponsor
TAYPER Enterprises

Master of Ceremonies

Peter Hayes

Peter Hayes has extensive experience across education and training, R&D investment and management, viticultural operations, irrigation sector and government and industry affairs in a 40 year career in the wine industry. Working across the public and private sector, career appointments include Lecturer/Senior Lecturer/Vice Principal, Dookie Agricultural College; State Viticulturist, Victoria; Executive Director, Grape and Wine Research and Development Corporation; Acting CEO, Cooperative Research Centre for Viticulture; Director of Viticulture, Rosemount Estates; and National Viticulturist and Industry Affairs Manager, Southcorp Wines. Industry positions held include Council Member, Australian Wine Research Institute; President, Australian Society of Viticulture and Oenology; President of the International Organisation of Vine and Wine; Chair, CRC for Irrigation Futures, and Independent Chair of McLaren Vale Grape Wine & Tourism Association amongst others. He is currently Deputy Chancellor at Charles Sturt University and a board member of Irrigation Australia Ltd. Peter operates as an independent Wine Industry Strategist and Advisor with activity in Australia, India and the UK. He is also Business Editor of the International Journal of Wine Economics and Policy. Qualifications held are B.Sc. (University of Melbourne), Dip.Ed. (Monash University), B.App.Sci.-Wine Science (Riverina College/CSU); MS-Horticulture (UCD). Peter was also awarded an AM in the Australia Day Honours list in 2016.



Program

Thursday, November 10th

Session Sponsor
OMNIA Specialities Australia

Session Sponsor
E. E. MUIR & Sons

9:00am	Conference Registration & Trade Exhibition Session	Grand Lobby
9:10am	Water and Energy: Taking Control	Gavin McMahon - National Irrigators' Council
9:30am	Choke or Bottleneck on Development	Dr. Mark Bailey - Goulbourn Murray Water
9:50am	Pollination Services Worth Paying For	Danny Le Feuvre - Australian Bee Services
10:10am	Recycling a Requirement of the Right to Farm	Stephen Richards - Farm Waste Recovery
10:30am	Morning Tea & Trade Exhibition Session	Grand Lobby
11:10am	Marketing Australian Almonds: 15 Years Strong	Joseph Ebbage - Almond Board of Australia
11:30am	Relationships Between Nut Consumption and Vascular and Cognitive Function	Assoc. Prof. Alison Coates - University of SA
11:50am	Almond Nutrition News	Aranya Changkaoprom - Nutrition Australia
12:05pm	The Market for Australian Almonds	Tim Jackson - Almondco Australia
12:25pm	Deep Dive into Australian Almonds	Chanel Day - Nielsen
1:00pm	Lunch & Trade Exhibition Session	Grand Lobby
1:45pm	The Almond Centre of Excellence Experimental Orchard	Video
1:50pm	Characterising Constraints to Alternate Production Systems	Tim Pitt - SA Research and Development Institute
2:10pm	AgVic's Field Laboratory: A Platform for Current and Future Production Systems	Michael Treeby - Agriculture Victoria
2:30pm	Next Generation Growing and Handling Systems for Almonds	Dr. Grant Thorp and Dr. Michael Coates - Plant and Food Research
2:50pm	Closure	Peter Hayes and Neale Bennett
3:00pm	Conference Close	

The Conference Program may be subject to change at any time prior to the event.





**australian
almonds**

ALMOND BOARD OF AUSTRALIA

COMMUNICATIONS & STAKEHOLDER ENGAGEMENT PLAN

PROJECT AL16003

Australian Almond Statistics & Data Collection 2017-2019

OUR MISSION:

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.



AUSTRALIAN ALMONDS
www.australianalmonds.com.au



Summary

The Almond Board of Australia (ABA) is the lead organisation providing industry communications to the Australian almond industry. It is the peak industry body and as such, represents the interests of all almond grower / levy payers across all growing regions in Australia. The ABA has extensive experience in exploiting a range of communication tools dedicated to empowering and informing growers / levy payers and participants within the supply chain so that they can make better business decisions.

This report provides details of the Review and Strategy as it relates to activities that are funded by HIA Ltd under Project AL16003 'Australian Almond Industry Statistics & Data Collections 201-2019'. This project is an integral part of the broader industry development program aimed at implementing the almond industry's strategic plan.

The Australian Almond industry in 2015 was Australia's most valuable single commodity horticultural industry worth \$1billion at the farmgate. This represents more than 10% of the value of the total Australian horticultural industry's GVP. It is still a young industry with a sixfold increase in plantings during the 2000s. After a brief hiatus, the industry is again rapidly expanding, with a 50% expansion in orchard area underway involving a billion dollars of investment from a broad spectrum of producers and corporate investors.

The industry's statistics collection and dissemination program plays a critical role in developing and implementing industry and management strategies to maximise the competitiveness of the Australian almond industry. The industry must compete against the Californian almond industry, which in 2015 was worth more than the entire Australian horticultural industry. The Almond Board of Australia is charged with representing 98% of Australian production, processing and marketing and is responsible for implementing the industry strategic plan covering many facets of the supply chain. Collecting, analysing and communicating statistics is crucial if the industry is to continue to work in the cohesive manner that has been the hallmark of its successful development to date. Horticulture Innovation Australia Limited's research program aims to deliver in part the knowledge required for the ABA to implement the industry strategic plan, but information is also sourced from industry producers, marketers, government bodies and participants around the world to ensure Australian industry members are well placed to make strong business decisions.

This project provides industry with objective measures of Australian and global supply and demand, and an estimate of future production. This facilitates early planning for input surety and necessary market development to maintain viability.

Purpose

Industry statistics collection and information flow is ranked as a high priority in the Australian Almond Industry Strategic R&D Plan 2011 – 2016, and aims to deliver the following outputs:

- Maintenance of a comprehensive, up to date database of contact details for industry participants for distribution of communication material including biosecurity incursion actions, planting information and other industry correspondence.
- Ensuring industry statistics are up-to-date and readily available in a range of formats
- Australian and international almond statistics published in the industry newsletter *In A Nutshell*.
- An Annual Almond Planting Survey, conducted, collated, and aggregated results published in the ABA publication *Almond Insights* which is widely distributed and forms the basis for informed industry planning.
- Ongoing collection and dissemination of industry statistics with associated press releases and export trade missions as necessary
- Almond industry statistics report *Almond Insights* – Prepared annually, published and distributed and also be available on the website containing aggregated and collated information from:
 - o Sales and production data from Australian Almond Processing and Marketing companies
 - o Annual Australian almond planting surveys
 - o The Australian Bureau of Statistics
 - o Homescan data provided by HIA Ltd
 - o Australian Nut Industry Council
 - o Nuts for Life
 - o International statistics data from the International Nut and Dried Fruit Foundation, Almond Board of California and United States Department of Agriculture
- Industry position reports published and disseminated to industry stakeholders and interested participants and uploaded to the ABA website
- Crop forecasts produced at least annually and distributed.

Statistical data and its associated publications are intended for a wide-ranging audience including:

- Almond growers, processors and marketers
- ABA Board and sub-committees
- Industry investors
- Hort Innovation
- National and international nut traders
- Researchers
- Industry service providers such as nurseries, beekeepers, water organisations
- Politicians and Government agencies
- The Australian Bureau of Statistics
- Partner organisations including SARDI, DEDJTR, PIRSA, PHA, ANIC, RIRDC, Universities and Nuts for Life

The tools used to disseminate statistical information will include:

- Board and sub-committee briefing notes
- Presentations to various industry stakeholders
- Almond Insights publication
- E-blasts
- Quarterly Position reports
- Crop forecast reports
- In A Nutshell publication
- Website
- Social Media
- Press Releases

The methodology by which this project will be delivered is multi-dimensional, and target audiences will be able to access information from a range of sources. This new statistics and data collection project will continue the improvement of the service previously provided by incorporating enhancements determined through project reviews.

Background, Objectives & Scope

Background

This project follows and builds on from the project “AL11005 Almond Industry Communications” and links with the Hort Innovation funded project “AL16000 Almond Industry Communications Programme”. It focuses on providing timely statistical information and analysis to all Australian almond industry stakeholders and interested parties.

In 2005, the Almond Board of Australia 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. Greater than 98% survey response was received in 2015, and it is currently estimated that non reported data collectively represents approximately 1% of total plantings. The scope of data collection activities has been extended to encompass comprehensive worldwide production, sales (domestic, export, import) and consumption figures. This data is crucial for industry planning and also provides key information for Hort Innovation’s Strategic R&D Investment Plan, preparation of budgets for annual investment planning and benefit cost projects.

The industry database has been developed and is maintained and extended as required, for statistical data entry and analysis. The information contained within this database is aggregated, collated and printed as the Annual Almond Industry Statistics Report *Almond Insights* and includes information with respect to almond plantings, production, sales and consumption. Annual survey data is collected, collated, analysed and reported annually to assess almond plantings by age, variety, state, region, post code, tree spacing and irrigation type. This data is then consolidated and used to determine future production estimates: total, by state, by region and by variety. The plantings data provides the basis for crop forecasts for industry and the Hort Innovation R&D planning program. Production and sales data is collected from almond processor / marketers, including production forecasts and actual production by variety and by state. Sales data is collected by tonnage of exports and domestic sales, both in-shell and kernel. This information is supplemented by analysis of ABS data relating to almond exports and then used to calculate Australian almond production.

The ABA is well positioned to undertake industry statistics and data collection activities as it has developed a skilled, dedicated staff, and close connections with industry growers and processors. The ABA also maintains a comprehensive, confidential database of industry participants which is an essential tool in both the collection and distribution of statistics information.

Furthermore, the ABA utilises its close connections with Australian almond processors to capture confidential production information that would not be possible by any other source. The ABA’s established networks enable highly accurate input into the Australian Almond Statistics Collection program, with 98% response in 2016 to the annual grower survey of almond plantings. This information allows industry planning from capital expenditure on processing facilities to calculating future R&D levy income to the knowledge of what varieties are being planted for calculating pollination needs through to being able to assess impacted orchards surrounding a biosecurity incursion.

In addition, the rapid growth of the Australian almond industry and high level of corporate investment has significantly increased the participation of professional managers who have high-level communication needs. This project provides a broad range of statistical data publications and enables access to information in the most suitable way.

Objectives

The purpose of this project is to provide an effective statistics collection, analysis and dissemination programme to enable industry participants to improve their knowledge and make informed decisions to better enable them to compete in a sustainable manner. The Australian almond industry is a very dynamic one; wherein participants are reliant on the up to date data supplied by the project in both planning and implementation of their production, investment and marketing plans.

The project aims to deliver the following:

- Maintenance of an up to date, comprehensive database of industry participants including orchard and production statistics.
- An annual plantings survey sent to all known Australian almond growers.
- Regular statistical collection from Australian almond marketers and processors encompassing production, import and export figures by state and variety.
- Collection of data from external sources including the Almond Board of California (ABC), International Nut Council (INC), Australian Nut Industry Council (ANIC), Nuts for Life, Australian Bureau of Statistics (ABS), United States Department of Agriculture (USDA) and other reputable and reliable data collection agencies.
- Analysis of planting, production and marketing data for reporting to the ABA Board, subcommittees and levy payers.
- Publication and distribution of an annual industry statistics publication *Almond Insights* to almond growers, processors, media outlets, government and politicians and the broader community.
- Industry crop forecasts produced following fruit set, prior to harvest, following receivals by processors and following completion of hulling.
- An industry website encompassing readily available monthly statistics reports and information.
- Media releases promoting key industry statistics including crop estimates, planting information and import/export data.

Scope

The scope of this document is to prepare a Communications Strategy and Action Plan for the ABA for the life of project AL16003. This includes:

- Communications plan for key audiences
- The content/messages/activities for each audience
- The channels/tools required
- Inclusion of electronic and social media as appropriate
- Priorities across audiences, content and channels
- Nominations of resources required including staffing and infrastructure – in-house resource and external
- An action plan for implementation

Key Audiences & Communications Channels

Audiences

A fundamental consideration in undertaking the development of the Communications Strategy was an assessment of the needs of the target audiences of almond industry statistics. These audiences were assessed to include:

- | | |
|---|---|
| 1 Internal Audience <ul style="list-style-type: none">o ABA Staff, Board Members & Committees | 4 Statutory & Government: <ul style="list-style-type: none">o Horticulture Innovation Australiao Minister for Agriculture, Fisheries and Forestryo Parliamentary Secretary to the Minister for Agriculture, Fisheries and Forestryo Ministers such as Trade, Regional Development, Water, Natural Resourceso Australian Government Department of Agriculture and Water Resources;o State departments of primary industrieso Australian Quarantine and Inspection Serviceo National Residue Surveyo Australian Bureau of Statistics |
| 2 Primary audiences <ul style="list-style-type: none">o All almond growers (levy payers)o Supply chain participantso Industry Investors | |
| 3 Secondary audiences: <ul style="list-style-type: none">o Agronomistso Researcherso Input supplierso Consumers / communityo Media | |

There are regular messages which are critical to the success of the almond industry, these messages will be woven into activities defined by this plan and consist of the following:

- Communicate industry information - communicate issues such as supply and demand statistics, consumer trends, market opportunities, input requirements such as water, nursery trees, and labour, environmental and natural resource management
- Benefits of industry data and initiatives to collect relevant industry data - outline benefits to industry and mechanism that will be used to collect data
- Topical industry issues – communicate major issues that are impacting on industry and consequences / actions required by industry participants
- Promote the Australian almond industry to the broader community, consumers and government

During the life of the project the concept and value of the Australian Almond Industry needs to be understood by a wide variety of sectors, industry and stakeholders. These stakeholders will ultimately play a role in achieving a commercially sustainable almond industry.

The table below identifies the information that the defined list of ABA target audiences needs to receive through the ABA statistics and data program.

Target Audience	Media/Delivery Channels
Internal	All ABA communications activities
Primary	Newsletters, emails, website, meetings with ABA and industry representatives, media releases, publications, statistical reports
Secondary	Newsletters, emails, website, meetings with ABA and industry representatives, media releases, publications, statistical reports
Statutory & Government	Newsletters, emails, website, meetings with ABA and industry representatives, media releases, publications, statistical reports

There is the need for a holistic approach to be taken within the Australian almond Industry and its stakeholders both internally and externally. The almond industry must ensure it is seen a proactive industry catering for the needs of its growers, and stakeholders both here in Australia and overseas.

Key factors for this to occur are:

- Strong analysis of supply and demand statistics in Australia and globally as the basis for market development activities
- ABA website to be regularly updated and contain key statistical documents and reports from the ABA and HIA
- Encourage more stakeholders to utilise the website Ensure that all material is available in a number of formats such as electronic, printed and in plain speak
- Set up feedback systems to ensure all stakeholders can provide information and ideas for new publications and ideas for the benefit of the industry into the future
- ABA Board and value chain committee structure
- ABA staff linkages to growers, processors and marketers, Hort Innovation, government and media

Annual Plantings Survey

The Australian almond planting survey is distributed to all Australian almond growers and updated annually to assess almond plantings by age, variety, state, region, tree spacing, irrigation type and pollination needs. This data is then consolidated and used to determine future production estimates by industry, by state, by region and by variety. In the past two years, the ABA has also collected planned future orchard expansion as a means of providing all of industry data to all levels of government, water authorities, investors, producers and suppliers. It also provides a basis for estimating future supply and market development planning. Production based levy revenue estimates can also be produced with a high degree of accuracy. This survey and collation is a major undertaking involving most of the ABA staff.

Recommendations:

- Research cloud platforms to gather and house data enabling easier access and less manual tasking by ABA staff, growers, processors and marketers
- Further research industry participants to ensure the few remaining grower enterprises not captured in the plantings data are included in future

Almond Insights Publication

A detailed report with respect almond plantings, production, sales and consumption collected is designed and printed annually. The production and sales data collected throughout the year is the basis for the annual snapshot on an almond marketing year basis, March to February; that is from crop to crop.

The *Almond Insights* publication summarises and consolidates industry information in a format that is easy to understand, encompassing almond plantings, production, domestic sales, varieties, sizing, import and export, world production and consumption and global position. ABA Communications Manager, Jo Pippas is responsible for data collection and management, publishing, design and layout of all almond industry communication documents, including this booklet. The booklet provides a summary document utilised in planning, communication and relationship building.

Concerns that relate to Almond Insights include:

- Data validation from international sources; it is difficult to accurately determine production and consumption figures from some international sources which could lead to data inaccuracy over time
- Some grower information and plantings is not accounted for; A limited number of growers enter the industry and market their own product may not be included in the plantings or production information which impacts slightly on data accuracy. An adjustment of 500 tonnes is made to Australian annual production figures to account for these grower/marketers.

Almond Insights is a primary tool to inform stakeholders and participants within the supply chain so that they can make better business decisions. Specifically, Almond Insights is the key channel for the dissemination of:

- Statistical data relating to plantings, production, imports, exports and domestic consumption and comparative data between international almond producing countries
- Information including trends in domestic and international markets, trade requirements, climate change and environmental issues.

Recommendations:

- Continue to develop the Almond Insights booklet to include new and relevant statistical analysis of the Australian and global almond industries in relation to nut production, consumption and sales data.
- Monitoring the uptake of news stories to gauge the effectiveness and reach of this publication

ABA Media Relations & Press Releases

The ABA Chairman and Chief Executive Officer are the official industry spokespeople to ensure the messages they convey are consistent, relevant and accurate. The Market Development Manager may occasionally comment to media on specific activities as part of a targeted media strategy. This is another effective means of reinforcing information to media outlets. The interaction by a few ABA spokespeople has enabled a strong and trusting relationships to be established with the media. This is done in a proactive manner with ABA press releases stimulating wide media interest in industry matters. The type of media activity outside the norm is directed by the ABA Board. In doing so, the ABA is mindful that media activity can impact heavily on the time of the Chair and CEO.

Review of communications infrastructure / processes and future requirements

The ABA will conduct a mid-term review (as part of project M&E) of the statistical requirements of the Australian almond industry in addition to the ongoing development of the industry's statistical program. The statistical knowledge gained from this project is also communicated via the Communications project AL16000. Findings from the monitoring and evaluation of the Communications project will also be relevant to this project's assessment.

Ongoing evaluation of the key project outputs occurs at each quarterly meeting of the Market Development Committee and the ABA Board. As the prime users of the statistical information, this ensures the data and reports remain relevant and presented well.

The Almond Board of California also provides a valuable guide on the structuring of reports, and their website and publications are carefully monitored for improvements that can be incorporated into the statistical program for the Australian almond industry. The M&E plan will cover key evaluation questions, indicators and data collection methods and sources.

Industry Database

A database of industry statistical data has been developed over an extended period and is maintained and extended as required. The maintenance of the industry database is crucial to collecting, producing and distributing information.

This database is continually updated by ABA Staff from contact with industry participants and members and further review of the database is conducted three times per year by phone, email and following industry events to ensure contact details for each person listed are accurate.

In addition to contact information, the database contains statistical information including marketers' domestic and export sales, varietal production, crack out information, quality grades and regional production data. Marketers sales data is collected on a monthly basis and is provided on a confidential basis to the ABA to be used to compile aggregated whole of industry statistics. In addition, where necessary to address food safety issues, the marketers provide quality assurance data including bacterial and mycotoxin test results on a confidential basis. Data is also collected and collated from sources external to ABA membership including the Nielsen Homescan (facilitated through a Third Party Agreement as required by Hort Innovation and Nielsen), Innova, Australian Bureau of Statistics, Department of Agriculture and Water Resources, International Nut Council, Australian Nut Industry Council, Almond Board of California and United States Department of Agriculture.

Situation Analysis

The current Strategic R&D Plan for the Australian almond industry highlights that: Australia has a worldwide reputation as a supplier of quality almonds. Few countries can efficiently produce the high-quality almonds that Australia provides. This gives Australia a powerful competitive position as an international supplier.

As the Peak Industry Body (PIB) for the almond industry, ABA's role is to:

- Provide recommendations on behalf of industry to HIA Ltd regarding the expenditure of almond levies
- Communicate back to growers the outcomes from HIA Ltd and industry investment
- Provide services to almond growers / levy payers and the supply chain to improve their business decision making and enhance their day to day operations. This includes:
 - o A provision of extension and industry development services
 - o Dissemination of regulatory and policy changes eg chemical, environmental and labour
 - o Dissemination of key messages and learning points from levy funded research and extension.
- Represent the interests of almond growers to policy-makers and regulators across Government

This project will enable deeper insights into the production and trade performance of Australian almonds and provide all Australian almond growers, processors, marketers, trade contacts, industry service providers and government agencies with pertinent information relating to almond industry plantings, production (current and future), sales, consumption, product information relevant to their business in a timely manner to enable better business decisions to be made.

The short-term outcome this project is responsible for is improving knowledge about industry statistics. This project will also contribute to improved strategic planning for the industry and implementation of plans and resource investment by a thorough understanding of supply, demand and market factors and trends. By making better business decisions the current viability and sustainability of the Australian almond industry is enhanced. The government and those organisations associated with the industry will also have better

information to address important issues such as water infrastructure, annual water use limits, state allocation caps, fertiliser and chemical imports, chemical registrations and pollination hive strategies to meet future needs. The value of the information provided through this project (e.g data quality, usefulness) and how it has been used in decision making will be evaluated through feedback from the ABA Board, Market Development Committee members and other key stakeholders. The annual plantings survey will enable the uptake of some key technologies of the R&D investment program to be measured such as the uptake of new varieties, orchard design, etc. This project will provide benchmarks that can be used in M&E and establishing indicators for other R&D projects.

The ABA is best placed to aggregate and communicate relevant information, to provide necessary services to growers and the supply chain to empower them to make the best business decisions.

Communications Objectives

All ABA communications activities are designed to support the organisation's key business objectives in the Strategic Research and Development Plan:

- Develop & maintain market opportunities (volume sold)
- Improved efficiency & sustainability (costs & risks)
- Increase product value (quality & price)
- Provide a supportive operating environment (skills & communication)

More specifically Statistics Collection & Data activities align directly with:

Objective 1: Develop & maintain Market Opportunities (volume sold)

Understand consumer and customer needs in domestic and export markets to increase demand for Australian almonds

Strategy	Actions	Outputs	Industry Outcomes
Strategy 1.1 Enhance the capability to build the Australian Almond Brand through market & consumer research	• Identify priority markets and/or market segments • Conduct analysis of key markets including customer specifications, government/trade requirements & consumer preferences • Develop strategies for marketing Australian almonds in selected markets based on research findings • Collect & analyse ongoing market intelligence & scan data	• Market strategy for prioritised markets based on ongoing market intelligence	• Australia's share of the targeted export markets increases to accommodate the increase in almond production. • Domestic consumption of Australian almonds grows
Strategy 1.2 Identify & develop new market opportunities	• Encourage commercial investment in confidential projects to scope research & test new market opportunities	• Confidential information that supports the development of new market opportunities	• New & existing markets are developed for Australian almonds
Strategy 1.3 Research & educate key influencers about the health benefits of almonds	• Initiate research with respect to health benefits associated with almonds • Undertake education programs targeting key influencers	• Information packages and educational materials	• Health professionals & other key influencers promote almonds as a part of a healthy diet

Objective 4: Provide a supportive operating environment (skills and communication)

Support industry development through enhancement of the operating environment (i.e. leadership, skills development, partnerships, communication, extension, R&D resources).

Strategy	Actions	Outputs	Industry Outcomes
Strategy 4.1 Enhance skills & capacity to support current & future industry needs	• Facilitate & support initiatives to develop: • Young leaders • Research capacity • Skills base across the industry • Secondary & tertiary students following a career in horticulture • International study trips organised and industry involvement encouraged	• Scholarships to support tertiary institutional research • Training programs for industry stakeholders • Career days, field days & information sessions to promote almonds & horticulture to students & teachers • International study trips	• Industry capacity is enhanced through increased skills development
Strategy 4.2 Develop & deliver effective R&D programs that support the Strategic Plan	• Prioritise strategies & actions requiring R&D projects • Calculate projected funds from statutory levies & voluntary contribution funds • Identify strategic partners to better leverage funds • Implement the plan by appointing R&D providers for priority R&D projects • Monitor and evaluate implementation of the R&D Strategic Plan via a formal review	• Strategic Plan for the Australian Almond Industry • Project briefs for all priority strategies within each Objective • Processing sub-committee established • Evaluation Reviews of R&D Strategic Plan (Years 3 & 5)	• The industry has a strong R&D plan • The R&D projects commissioned achieve the Outputs.

	• Monitor skills required for each of the strategic committees & address any gaps		
Strategy 4.3 Support adoption of R&D outcomes by effective extension	• All R&D projects to include an adoption plan, budget & resource allocation for extension & technology transfer • ABA is to be written into all project applications to ensure active involvement in the extension process • Develop demand driven publications, products & services	• Extension publications, products & services, including fact sheets, field days, workshops and training sessions • Project updates included in newsletters • Final project reports available on the ABA website • Regular survey of stakeholders to evaluate technology transfer • Analysis of technology transfer	• High level uptake of R&D outcomes by industry
Strategy 4.4 Facilitate the two-way flow of information through the value chain	• Ongoing collection and dissemination of industry statistics • Develop & implement a communication strategy • Fostering opportunities for value chain interaction including the Annual Almond Conference and Research & Development Forum • Evaluate the effectiveness and appropriateness of communication practices	• Publications disseminating industry statistics • Communication initiatives developed & delivered, including website updates and e-newsletters • Almond Conferences and Research & Development Forums • Annual communication effectiveness survey	• Proportion of stakeholders accessing the ABA's website increases • All stakeholders across the value chain are informed & engaged • Decision making across all areas of the almond supply chain are supported through access to timely and relevant information • Industry statistics are up-to-date and readily available in a range of formats

Methodology

The cohesive nature of the industry has enabled the establishment of an effective statistics collection system, which provides the basis for much of the industry statistical communication and data collection activities. This information requires regular updating and analysis to ensure that it remains accurate and relevant.

The ABA's Market Development Committee comprising Brendan Sidhu of Jubilee and Century Orchards, Damien Houlahan of Olam International, Laurence Van Driel of Select Harvests, Tim Jackson of Almondco Australia, Grant Birrell of Nut Producers Australia and ABA CEO, Ross Skinner, and Market Development Manager, Joseph Ebbage undertake the analysis and oversee the statistical requirements from a production, supply, demand, sales and shipment perspective. The industry marketers control the entire Australian almond industry supply chain both domestically and export apart from an estimated 500 tonnes that is directly marketed by growers at farmers markets and to health food shops.

The ABA is uniquely positioned to garner data as its day-to-day business activities span the breadth of the industry and has strong, trusting relationships with producers, processors and marketers that allows confidential information collection that is not accessible to third parties until aggregated by the ABA.

ABA Communications Manager, Jo Pippas is responsible for the development and maintenance of the database and for statistical data entry that is also undertaken by the ABA Finance and Business Manager, Shannon Harkins. Database design and purpose is continually monitored, and changes are completed as needed.

Different communication methods are suited to different audiences, and this project utilises a range of communication methods including in person presentations, print, digital and written media as outlined below. Communication methods are integrated so each contains links with others and encourages feedback and information sharing. It is essential that these communications are readily available to all participants and service providers in a variety of formats to suit the diverse nature of each audience.

With these objectives in mind, the communications project aims to achieve key outcomes including:

- Maintenance of an up to date, comprehensive database of industry participants including orchard and production statistics.
- An annual plantings survey sent to all known Australian almond growers.
- Regular statistical collection from Australian almond marketers and processors encompassing production, import and export figures by state and variety.
- Collection of data from external sources including the Almond Board of California (ABC), International Nut Council (INC), Australian Nut Industry Council (ANIC), Nuts for Life, Australian Bureau of Statistics (ABS), United States Department of Agriculture (USDA) and other reputable and reliable data collection agencies.
- Analysis of planting, production and marketing data for reporting to the ABA Board, Subcommittees and levy payers.
- Publication and distribution of an annual industry statistics publication *Almond Insights* to almond growers, processors, media outlets, government and politicians and the broader community.
- Industry crop forecasts produced following fruit set, prior to harvest, following receivals by processors and following completion of hulling.
- An industry website encompassing readily available monthly statistics reports and information.
- Media releases promoting key industry statistics including crop estimates, planting information and import/export data.

Principles for engagement

The ABA uses five key principles to guide stakeholder engagement activities. The principles set the standards to which we aspire in building consistent, open and respectful relationships. The principles have been tested against and are consistent with current stakeholder engagement standards and practices across the public and private sectors, locally and internationally.

Purposeful	We begin every engagement with a clear understanding of what we want to achieve • While our engagement will be driven by strategic priorities, we must be aware of our stakeholders' objectives, environment, expertise and level of influence. • When we know why we need to engage and we agree on what success looks like, it is easier to conduct focused and meaningful engagement. • By planning our communication and managing expectations, we aim to build lasting goodwill with stakeholders participating in the process and develop an understanding about their capacity to engage.
Inclusive	We identify relevant stakeholders and make it easy for them to engage • We identify and enable the participation of those people and organisations who contribute to, influence, or are affected by our work. This includes those that may be harder to reach for reasons such as language, culture, age or mobility. • We provide our stakeholders with the information they need to participate in a meaningful way
Timely	We involve stakeholders from the start and agree on when and how to engage • We will clearly identify and explain the engagement process, and negotiate with stakeholders, where possible, as to timelines. • This includes meeting schedules, and response times for information requests or feedback.
Transparent	We are open and honest in our engagement and set clear expectations • We will provide information so stakeholders can participate in a meaningful way and will foster a culture of sharing ideas. • We will clearly identify and explain the engagement process, the role of stakeholders in the engagement process, and communicate how their input will inform the project.
Respectful	We acknowledge and respect the expertise, perspective, and needs of stakeholders • We understand that engagement is a two-way process. We take care to be open to alternative views and to listen as well as speak. • We respect our stakeholders' expertise and appreciate the benefits of mutual learning. • We recognise the different communication needs and preferences of stakeholders and endeavor to meet these wherever possible.

Process for engagement

The ABA's model for stakeholder engagement has been adapted from the international standard developed by the Institute of Social and Ethical Accountability (2005).

This five-step process is structure to support thorough planning, preparation, action and evaluation of every engagement activity. The process is a dynamic and ongoing cycle, which supports a comprehensive approach to engagement and will, over time, build an evidence based platform for continuous improvement.



Think

Develop an overall consideration of strategic objectives, how these relate to stakeholders and specific issues, and conduct an initial prioritisation of stakeholders and issues for further analysis.

Plan

Introduce different levels of engagement, and guide the analysis of existing relationships, available resources and organisational constraints. Learn more about specific stakeholder's representatives, and to decide on what kind of relationship to develop with these stakeholders.

Prepare

Address questions of internal and external competencies and capacities to engage, and ensure that all parties to an engagement can join and take part effectively.

Engage

Address and outline different engagement techniques, and – building on the previous steps – design an approach that suits the needs of the specific situation to reach your objectives.

Evaluate

Follow-up on the outputs of engagement, and ensure that stakeholders feel assured regarding the quality of efforts.

How this process is applied will be driven by the purpose, level and type of engagement undertaken. It is also important to note that the process will operate at the strategic and operational ends of stakeholder engagement activities and more than one step in the process at any time, with different stakeholders, depending on the nature of the engagement.

Communications Matrix

ID	Event	Description	Medium (Channel)	Audience	R&D Objective	Frequency
1	Industry Database	Regularly updated information by ABA Staff from contact with industry participants through the ABA membership process and details provided at attendance at producer and trade forums.	Face to Face, Telephone, Email	1	4.4	Continuously
2	Annual Planting Survey	Annual survey distributed to all Australian almond growers to assess almond plantings by age, variety, state, region, tree spacing, irrigation type and pollination needs	Mail, Telephone, Email	1	1.2, 4.1, 4.2, 4.3, 4.4	Annually
3	Almond Insights	Detailed report with respect almond plantings, production, sales and consumption reported on an almond marketing year basis	Print, Email, Mail, Website, Social Media, Face to Face	1,2,3,4	1.1, 1.2, 1.3, 4.1, 4.2, 4.3, 4.4	Annually
4	Annual Crop Forecasts (Media Releases & Media Relations)	Media information and comment on crop forecast based on growers' seasonal outlooks obtained provided to their industry processor/marketers	Industry Presentations, Email, Social Media, Website, News Media	1,2,3,4	1.1, 1.2, 1.3	Quarterly
5	Almond Export Position Reports	Almond sales data report for each month, by product by export market destination	Digitally	1,2,3,4	1.1, 1.2, 1.3	Monthly

Communications Responsibilities

Key:

A = **Accountable** for communication event, takes part in meetings

C = Provides information and **content** for communications material/event

E = **Evaluates** and approves communications material

P = **Publishes** information/communications material

M = **Monitors** communications process and provides feedback

Event ID	CEO	Market Development Committee	Comms Manager
1	A/C	C	A/C/M
2	A	-	A/C/P/M
3	A/C/E	C/E	A/C/P/M
4	A/C/E	C/E	A/E/P/M
5	A/E	C	A/E/P/M

Monitoring, Feedback & Evaluation

Monitoring, feedback and evaluation is key to measure the ongoing effectiveness of communications. By monitoring and responding to feedback regularly, communications can continue to address the needs and concerns of key stakeholders.

Monitoring and evaluation mechanisms will include:

- **Direct feedback** – face to face communications will provide an opportunity for the audience to give feedback directly on communications identified in the communication matrix
- **Formal feedback** – formal communication will be conducted via communications evaluation surveys conducted via email, online and telephone.
- **Informal feedback** – informal feedback will be obtained via word of mouth through ABA Staff and Committee members.
- **Email Campaign Monitoring** – monitoring of accumulated data and data on individual emails including list subscribers, unsubscribes, open rates, forward rates, bounce rate, click and conversion rates.
- **Website Metrics (Google Analytics)** – Quantitative website data such as number of visits, page views, unique views, return rate, time spent and bounce rate.
- **Social Media Monitoring** (All social media channels) – Third party and inbuilt monitoring including mentions, likes, reach, engagements, views, click-through rate, comments, shares, re-tweets, impressions and reactions.
- **Media Monitoring** – Uptake of ABA created press releases and quantitative data including reach, influence, coverage patterns, share of voice and sentiment

Project performance indicators are as follows:

- Prompted and unprompted awareness of the Almond Insights publication, Industry Position reports and Crop Forecast information releases
- At least 80% of industry to continue to collectively rate statistics communication from ABA as “Good”, “Very Good” or “Excellent.”
- Industry participants rate at least one of these publications as a valuable tool for assisting with decision making in their business
- A comprehensive and up to date data/information base which supports the industry in forward planning, communications and advocacy and levy investment.
- All stakeholders across the value chain are informed & engaged
- Decision making across all areas of the almond supply chain are supported through access to timely & relevant information
- Industry statistics are up-to-date & readily available in a range of formats

The success of communications activities will be measured by:

- Does the communication activity create an acceptance of change and a greater understanding of the information provided?
- Does the communication increase awareness of the goals of the ABA?
- Is the communicated information relevant?
- Does the information support ABA and HIA objectives?
- Are we effectively managing stakeholder and target audience expectations?
- Are we encouraging and responding to feedback?
- Is the frequency of communication appropriate to the level of the intended audience?
- To what extent are the new service delivery options being used?

Next Steps

This review and strategy will provide the basis upon which a plan can be further developed to deliver effective and timely information and know-how to meet needs into the future (next three to five years). Effectively, this engagement plan is to ensure that priorities and content as well as tools, activities and infrastructure provide the best possible outcomes for the money invested in the project.

The ABA remains committed to providing new and enhanced tools and resources to the almond industry. The ABA has the capacity to deliver improvements mentioned in this plan as well as other methods that may be identified in future program reviews.

This Engagement Plan provides the ABA with a direction to progress forward. The ABA has a small but highly experienced team to deliver the new statistics and data collections program to meet the needs of industry stakeholders.

The new program is targeted for commencement from January 2017.



australian
almonds

ALMOND BOARD OF AUSTRALIA

PROJECT RISK REGISTER

PROJECT AL16003

**AUSTRALIAN ALMOND INDUSTRY STATISTICS & DATA
COLLECTION 2017 - 2019**

OUR MISSION:

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.



AUSTRALIAN ALMONDS
www.australianalmonds.com.au



Overview

The Almond Board of Australia (ABA) is the lead organisation providing industry communications and statistics to the Australian almond industry. It is the peak industry body and as such, represents the interests of the almond industry across Australia. The ABA has extensive experience in exploiting a range of communication tools dedicated to empowering and informing industry participants within the supply chain so that they can make better business decisions.

The Australian Almond industry in 2015 was Australia's most valuable single commodity horticultural industry worth \$1billion at the farmgate. This represents more than 10% of the value of the total Australian horticultural industry's GVP. It is still a young industry with a sixfold increase in plantings during the 2000s. After a brief hiatus, the industry is again rapidly expanding, with a 50% expansion in orchard area underway involving a billion dollars of investment from a broad spectrum of producers and corporate investors.

The industry's statistics collection and dissemination program plays a critical role in developing and implementing industry and management strategies to maximise the competitiveness of the Australian almond industry. The industry must also compete against the Californian almond industry, which in 2015 was worth more than the entire Australian horticultural industry. The Almond Board of Australia is charged with representing 99% of Australian production, processing and marketing and is responsible for implementing the industry strategic plan covering many facets of the supply chain. Collecting, analysing and communicating statistics is crucial if the industry is to continue to work in the cohesive manner that has been the hallmark of its successful development to date. Horticulture Innovation Australia Limited's research program aims to deliver in part the knowledge required for the ABA to implement the industry strategic plan, but information is also sourced from industry producers, marketers, government bodies and participants around the world to ensure Australian industry members are well placed to make strong business decisions.

Statistical collections, like all other projects, do not always go to plan. Statistical collection may suffer from uncertainties which can arise at any stage in any form. For example, large scale non-response to a survey, loss of vital data from computer malfunction, loss of skilled staff during the collection process can all impact on the collection process or the continuity of the project itself. While it is not always possible to avoid all such risks, it is important to recognise potential risks and develop plans to identify, analyse, avoid, eliminate, minimise or manage adverse impact of risks to the project.

Accountabilities & Responsibilities

The ABA is Australia's almond Peak Industry Body and trusted statistical information source, providing official statistics on a wide range of almond related data including, plantings, production, varietal information, trade information and comparative analysis to competing markets. The ABA also has an important statistical leadership role.

The ABA has a responsibility to:

- identify risks to their deliverables
- make reasonable and realistic assessments of risk
- accept and manage reasonable levels of risk
- consult with staff and other stakeholders to understand and manage risks
- work together to manage shared risks
- exercise good judgement and make decisions.

If the Almond Board of Australia does not engage fully with it's stakeholders, they may not realise the full potential of the data the ABA holds and therefore may not provide the ABA with insights around its risks.

If key statistics are wrong, or not available when they are needed to support good decision-making, this can have serious consequences for the almond industry and associated decision makers.

If there is a gap between capability and business requirements, the ABA will lack the agile and diverse work force needed to be able to respond to changing priorities.

Risk Management Strategy

Risk management is a set of activities concerned with identifying potential risks, analysing impacts, and devising and implementing responses to ensure objectives are achieved.

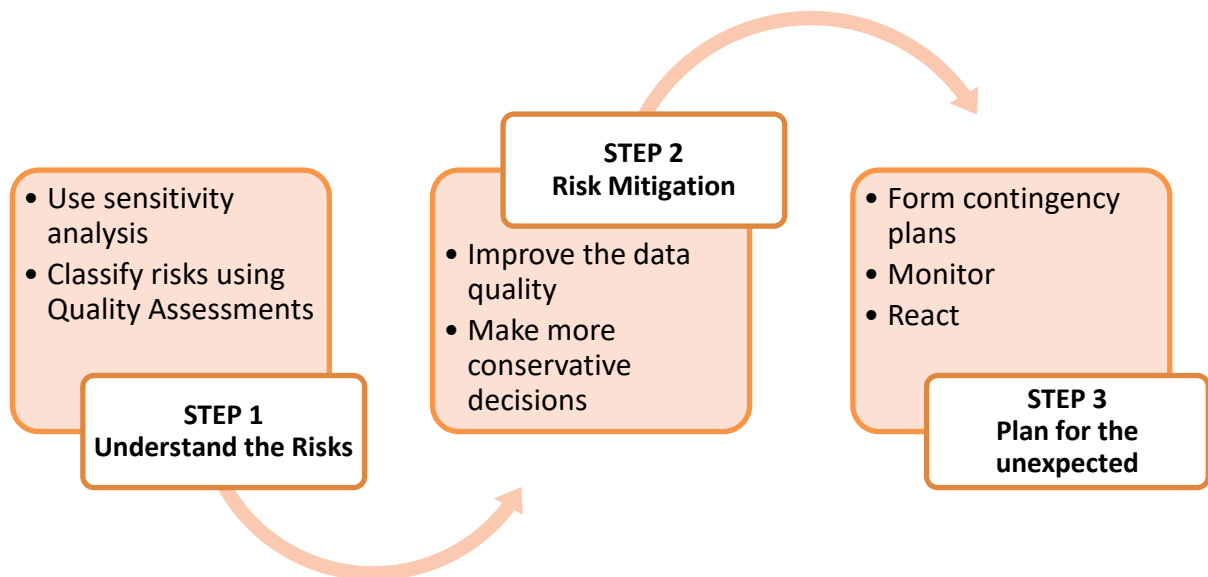
Risk management can be applied at every level. However, the effort needs to be commensurate with the associated risk. At some levels the process can be informal process, while at others it needs to be formalised, documented and managed. Risk management is an essential element of good corporate governance and a management tool to assist strategic and operational planning.

Risk Management Process

The risk management process is the systematic application of management policies, procedures and practices to the activities of communicating, consulting, establishing the context and identifying, analysing, evaluating, treating, monitoring and reviewing risk. Risk management should be part of the way the ABA does its work and risk management activities will be aligned with existing approaches where these exist.

Characteristics of an effectively run risk management process include:

- Everyone involved in a risk management process is clear about their role and any ongoing responsibility that they have, including any responsibility for implementing controls. There is one risk owner (decision maker) clearly nominated for each risk.
- The right people are involved at the right time. Complex objectives and risks may require a broad diversity of opinions and experience to ensure enough information is gathered to inform decision making. Less complex processes are frequently managed through standard corporate processes and line management decisionmaking processes.
- Documentation is produced, maintained and supports current and future processes. It needs to be practical and add value. It should reflect the contributing factors and outcomes of a decisionmaking process.



Step 1: Understanding Risks

The first step in risk management understanding risks, and this involves two key steps: sensitivity analysis, and classifying risks.

The purpose of sensitivity analysis is to identify the various levels of risk associated with using a specific data source for a given data need. This is achieved by examining the data against the data quality analysis framework and criteria and understanding the potential impact on the underlying decision of using the data.

As a result of this analysis, each characteristic is classified according to the degree of match between the data need and the data source, ranging from 'the data collection significantly falls short of requirements' to 'the data collection significantly exceeds requirements'.

Sensitivity analysis can be as simple as going through a process of asking two key questions:

- How different would the data need to be for me to make a different decision?
- How likely is it that the data would be that different as a result of the mismatch between my data need and the data source?

Step 2: Mitigating Risks

This step involves investigating options for reducing the level of risk. Two avenues have been identified here for application in statistical collections:

- Improving the data quality; and
- Making conservative decisions.

Improving data quality

Improving the data quality primarily deals with looking for opportunities to improve the match between the data need and the data source. There are a range of opportunities to improve the quality of the data source

1. Apply data collection to only part of the problem

This option accepts that the data source is sufficient for answering part of the question, but not all of it. For example, the scope of the data collection might only cover specific States but information is required for all States and Territories.

2. Accessing multiple data sources

Accessing multiple data sources provides the opportunity to either validate existing data sources or use each data source for its respective strengths and alternative data sources to cover the weaknesses. This may be particularly useful when data collection has been found to be suitable to apply to only part of the problem. Multiple data sources may also provide information for small area estimates where these are not otherwise available.

3. Deciding more information on the data collection is required

Risks that are identified in the Quality Assessment with the rating of 'There is insufficient information to judge the suitability of this characteristic' can be mitigated by undertaking further research to provide sufficient information to assess the suitability of the characteristic in question. These risks can then be adequately assessed and identified.

4. Modifying an existing data source

Any decision to modify the data collection will need to assess the cost of implementing changes against the benefits. The Quality Assessment should provide a key indication of the type and extent of modification required. The data characteristic measured against the Quality Assessment, as set out below, will identify the issues that need to be answered.

- a. The data collection significantly falls short of requirements: the data collection may require a significant structural change to better meet data need requirements. For example, the scope of the data collection might be changed to include a broader geographical scope or the sample size might be increased to meet specific ABA and industry requirements.
- b. The data collection is sufficient with some areas of reservations: the assessment has already identified that the data collection is already nearly sufficient to meet needs so this may indicate a smaller structural change to the collection or minor alterations to collection processing or procedures.
- c. The data collection is sufficient for the requirements: while the data collection may meet the specific needs of the industry, industry may have identified some potential areas for improvement, which may involve only marginal additional costs or allow for the data to be used more effectively across a wider range of purposes.
- d. The data collection significantly exceeds requirements: this rating may indicate that some savings might be achieved by reducing what is being offered. For example, the amount of editing might be reduced or the sample size might be reduced.
- e. There is insufficient information to judge the suitability of this characteristic: this reflects a need to improve the level of metadata available to provide a better mechanism to assess the quality of the collection and provide a suitable assessment.

5. Deciding a new data source is required

It may be decided that the risks associated with existing data sources are too high and cannot be sufficiently mitigated. In this case, it might be necessary to develop a new data source. The same process of assessing the proposed data source against the specified data need using the data quality framework should be followed.

While the above options are available to enhance the overall quality of any given data source, resource limitations may mean that compromises need to be made to achieve an 'affordable level of quality'. However, in making these compromises, two issues need to be considered:

- Where compromises should be made?
- Once compromises have been made, will the data still meet data requirements sufficiently?

Decision Making Issues

Having identified the risks, it is important that the underlying decision takes these risks into account. In other words, these decisions should take into account the quality of the data as well as the value of the data. It is difficult to provide specific options, as they are dependent on the underlying decision and the corresponding areas of risk.

Step 3: Plan for the Unexpected

Form Contingency Plans

In Understanding the Risks, Quality Assessment was used to classify the risks. The areas which were identified as higher risks are the same areas where contingency plans are required (unless the risks were later mitigated sufficiently).

Contingency plans are simply strategies of what to do if certain risks eventuate. For example, a low response rate for a survey generates a risk that the survey results are significantly influenced by non-response bias. As a result, inappropriate decisions might be made on the basis of the biased results. A contingency plan will have answers in place to solve problems associated with a higher than expected degree of non-response bias.

These contingency plans should relate to the underlying decision. A contingency plan might be to reduce or drop the program if uptake proves to be much lower than expected. These plans can be very similar to those considered early at the risk mitigation stage. However, instead of mitigating the risk immediately through making a more conservative decision, the decision might not fully take into account the associated risks. Rather, the risk mitigation option would only be implemented if further information suggested that the risks had been realised.

Monitor and React

Monitoring is a key part of planning for the unexpected. Having formed contingency plans, it is important that the information is available which will trigger the implementation of them.

While it may be possible to continue to monitor data from a regular survey or an ongoing administrative data system, this will not always be possible. As such, other ways to monitor the impact on the underlying decision should also be considered.

Dashboard - Issues & Risks

Issue Summary

Open	0
Closed	0
In Progress	0
Monitoring	0
Resolved	0
Low Impact	0
Med Impact	0
High Impact	0
Low Priority	0
Med Priority	0
High Priority	0
Total Issues	0

Issue Type Summary

Strategic	0
Financial	0
Regulatory	0
Management	0
Operational	0

Risk Summary

Open	8
Closed	0
In Progress	0
Monitoring	0
Resolved	0
Low	0
Moderate	1
High	5
Extreme	3
Total Risks	8

Risk Type Summary

Strategic	1
Financial	1
Regulatory	0
Management	1
Operational	5

Issue Status

☐ Open
 ☐ Closed
 ☐ In Progress
 ☐ Monitoring
 ☐ Resolved

0%

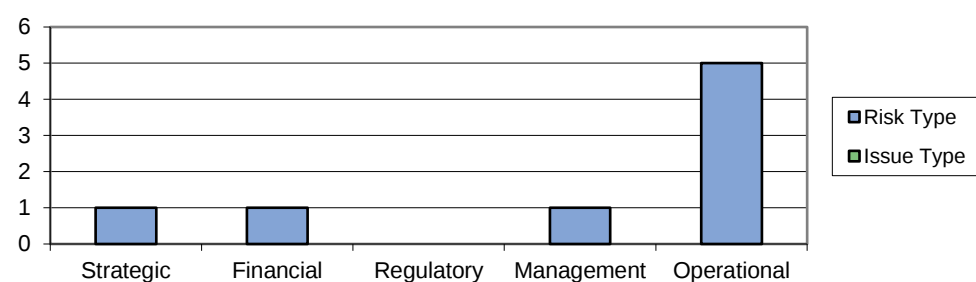
Risk Status

☐ Open
 ☐ Closed
 ☐ In Progress
 ☐ Monitoring
 ☐ Resolved

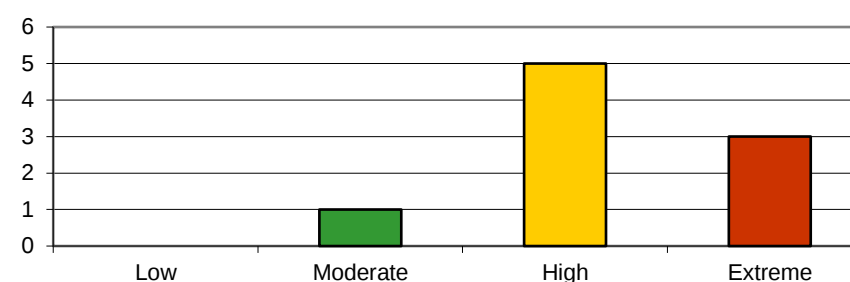
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100%

Risk & Issue Types



Total Risk Ratings



AS/NZ Standard 4360:2004 Risk Management



Each risk has been rated in terms of it’s resulting likelihood of occurrence and the potential impact, using the rating system specified in AS/NZ STANDARD 4360:2004 Risk Management. These are explained in the tables below.

Table 1 - Types of Issues/Risks

Type	Description
Strategic	Related strategic mission and objectives.
Financial	Related to economic impact (costs, revenues, budgets).
Regulatory (Compliance)	Related to legal and contractual obligations. Political legislative impacts.
Management	Related to decision making, resources, policies, etc.
Operational (Technical)	Related to ICT delivery, support or management services.

Table 2 - Qualitative Measure of Consequences of Likelihood

Level	Descriptor	Description	
A	Almost certain	Is expected to occur in most circumstances.	More than once per year
B	Likely	Will probably occur in most circumstances.	1 in 1 - 3 years
C	Possible	Might occur at some time.	1 in 3 - 5 years
D	Unlikely	Could occur at some time.	1 in 5 - 10 years
E	Rare	May occur in exceptional circumstances.	1 in 10 years

Table 3 - Qualitative Measure of Consequences of Impact

Level	Description	Example detail description
1	Insignificant	No injuries, low financial loss, no risk to reputation.
2	Minor	Minor First aid treatment, on-site release immediately contained, medium financial loss, some customer dissatisfaction.
3	Moderate	Medical treatment required, on-site release contained with outside assistance, high financial loss and public visibility.
4	Major	Major Extensive injuries, loss of production capability, invocation of disaster recovery with no detrimental effects, major financial loss.
5	Catastrophic	Death, off-site with detrimental effect, huge financial loss.

Table 4 - Quantitative Measure of Consequences of Impact

Level	Description	Example detail description
1	Insignificant	Nil – Negligible
2	Minor	5% - 10% Loss or Financial Loss \$1,000 - \$9,999
3	Moderate	10% - 50% Loss or Financial Loss \$10,000 - \$99,999
4	Major	50\$ - 75% Loss or Financial Loss \$100,000 - \$999,999
5	Catastrophic	Total Loss or Financial Loss in excess of \$1M

Table 5 - Qualitative Risk Analysis Matrix

	Consequences				
	Insignificant	Minor	Moderate	Major	Catastrophic
Likelihood:	1	2	3	4	5
A (almost certain)	H	H	E	E	E
B (likely)	M	H	H	E	E
C (possible)	L	M	H	E	E
D (unlikely)	L	L	M	H	E
E (rare)	L	L	M	H	H

Key	Description
E	Extreme Risk: Immediate action required to mitigate the risk.
H	High Risk: Action should be taken to compensate for the risk.
M	Moderate Risk: Action should be taken to monitor the risk.
L	Low Risk: Routine acceptance of the risk.

Table 6 - Issues/Risks status types

Type	Description
Open	New item identified and awaiting action.
Closed	Item closed e.g. no longer a concern, rejected, etc.
In progress	Item undergoing treatment/mitigation activities.
Monitoring	Treatment/Mitigation activities complete and being monitored.
Resolved	Item resolved through treatment/mitigation actions and resolution accepted by stakeholders.

ABA Statistics Program Risk Register

Ref No	Risk Type	Date Logged	Risk Control Area	Issue	Action Owner	Likelihood Rating	Likelihood	Impact Rating	Impact	Risk Rating	Risk Mitigation Actions	To Be Reviewed	Status
R1	Financial	03-Jan-17	Insufficient Funding	Insufficient funding available to support the Statistics collection program which could lead to costs overruns, damage to ABA reputation and compromised goals regarding coverage, response rates and overall quality	ABA	C	Possible	3	Moderate	H	Budget Monitoring & Planning; Regular financial updates from Finance Manager; Establish monitoring framework to ensure overall quality within budget; Re-negotiate with Hort Innovation Australia	01-Jul-17	Open
R2	Operational	03-Jan-17	Undercoverage of Data	New orchards and grower information not identified by the end of reporting period will not be included in yearly dataset, resulting in lower data accuracy.	ABA	C	Possible	2	Minor	M	ABA to work with current growers and regional representatives to reduce undercoverage based on local intelligence; Implement advertising and targeted communications to raise awareness of ABA and direct public toward ABA for more information	01-Jul-17	Open
R3	Operational	03-Jan-17	Maintaining Response Rates	The power of the accuracy of ABA data lies in its current relationships with growers and processors/marketers. If the reputation of the ABA is not maintained this may result in unwillingness to share data.	ABA	C	Possible	4	Major	E	ABA to work closely with stakeholders to maintain relationships; raise general awareness of statistical program and it's importance to leveraging position of Australian almond industry within Government mindset; Ensure accuracy and timeliness of data release to maintain consistency and reliability	01-Jul-17	Open
R4	Operational	03-Jan-17	Quality Standard Maintenance	Changes to question wording, mode of collection, process or society have the potential to create incoherent data. Some planned enhancements for future surveys include; number of FTE staff employed and number of seasonal workers employed in a 12 month period	ABA	B	Likely	2	Minor	H	Help to be made available from ABA staff to support respondents complete surveys accurately and in a timely manner; Information sheets to be distributed with 2017 survey to explain changes; AB Testing and checks for data entry into statistical database conducted and training given to appropriate staff prior to sending new surveys	01-Jul-17	Open
R5	Management	03-Jan-17	ABA Staffing	Unable to recruit and/or retain skilled staff for ABA statistical program	ABA	C	Possible	4	Major	E	Use of external agencies to collate and manage data; investigate cloud based data centre and reporting; outsourcing of publication design; Initiate contingency plans such as shift work, flexible working arrangements, external contractors;	01-Jul-17	Open
R6	Operational	03-Jan-17	IT Systems Fail	Key system(s) fail at critical times causing significant disruption to operations	ABA	B	Likely	3	Moderate	H	Multiple backups of data kept in multiple locations; Operations procedures that are well planned, have strong monitoring and response procedures; Data validation procedures in place to proactively find data issues; Sufficient staffing capacity over production periods	01-Jul-17	Open
R7	Strategic	03-Jan-17	External Events	External events (covering growing areas) have a major effect on data collection activities (i.e. Natural Disaster)	ABA	C	Possible	3	Moderate	H	Establish continuity plans; Adopt flexible plans for areas affected by natural disasters; Explore and develop alternate statistical methods for producing data for affected areas (eg imputation, alternate data sources); Develop appropriate communication campaign messaging to emphasise the value of data collection activities;	01-Jul-17	Open
R8	Operational	03-Jan-17	Security Breach	Unauthorised access/privacy security breach on ABA systems; Inappropriate use of systems by ABA staff	ABA	D	Unlikely	4	Major	H	Digital security system reviewed; operations monitoring to ensure security has been well planned, has strong alerting and response procedures; good programming and logging practices that reduce risk of security incidents; Strong process for access to data including simple and secure approach; security checks for non-ongoing staff	01-Jul-17	Open
R9	<select>	3/01/2017	Data Unavailability	Sources of data such as NASS, USDA, INC no longer available or deemed inaccurate	ABA	C	Possible	4	Major	E	Backups of data used in previous years kept in hard copy and digitally; Relationships to be formed with international reporting agencies for data provision; Reduce ABA reporting against international sources and refer only to known quantities	01-Jul-17	<select>

Activity: Communications Program						
Output	Support industry development through enhancement of the operating environment	Target Audience /s	Monitoring Method /s	Reporting Cycle	Responsibility	Method
Intermediate Outcome	Deliver effective communications that are valued highly by stakeholders	All stakeholders	- Email monitoring metrics - Website traffic metrics - Social media metrics - Biennial grower surveys - Media monitoring - Direct, Formal and Informal	Quarterly	Communications Manager	ABA, HIA (Milestones)
End of Program Outcome	ABA is the mainstay of the almond industry's information sources and statistics					

Activity: Australian Almond Insights Publication						
Output	Annual Almond Insights publication distributed to stakeholders	Target Audience /s	Monitoring Method /s	Reporting Cycle	Responsibility	To Whom
Intermediate Outcome	Industry and other identified targets are well-informed on all matters relevant to industry R&D programs as well as ABA operations and activities	- Internal - Primary - Secondary - Statutory & Government	- Email monitoring metrics - Website traffic metrics - Social media metrics - Biennial grower surveys - Media Monitoring - Direct, Formal and Informal	Quarterly, Mid Term Review	Communications Manager	ABA, HIA (Milestones)
End of Program Outcome	Improved strategic planning for the industry and implementation of plans and resource investment by a thorough understanding of supply, demand and market factors and trends					

Activity: Press Releases & Media Interviews						
Output	ABA Media releases and comment regarding crop status, plantings, production and trade matters	Target Audience /s	Monitoring Method /s	Reporting Cycle	Responsibility	To Whom
Intermediate Outcome	Development of regular information exchange of almond industry events and updates	- Internal - Primary - Secondary - Statutory & Government	- Email monitoring metrics - Website traffic metrics - Social media metrics - Media Monitoring - Direct, Formal and Informal	Monthly	Communications Manager	ABA, HIA (Milestones)
End of Program Outcome	Increase of almond related news stories appearing on media channels across Australia and internationally.					

Activity: Annual Almond Planting Surveys						
Output	Updated almond planting, production and pollination collection activities	Target Audience /s	Monitoring Method /s	Reporting Cycle	Responsibility	To Whom
Intermediate Outcome	Awareness of uptake of key technologies of R&D investment to be measured such as the uptake of new varieties, orchard design	- Internal - Primary	- Biennial grower surveys - Direct, Formal and Informal	Quarterly, Mid Term Review	Communications Manager	ABA, HIA (Milestones)
End of Program Outcome	Improved strategic planning for the industry and implementation of plans and resource investment by a thorough understanding of supply, demand and market factors and trends.					

Activity: Almond Export Position Reports						
Output	Export Position Reports	Target Audience /s	Monitoring Method /s	Reporting Cycle	Responsibility	To Whom
Intermediate Outcome	Stakeholders and other identified targets are well-informed on all matters relevant to almond export statistics	- Internal - Primary - Secondary - Statutory & Government	- Email monitoring metrics - Website traffic metrics - Social media metrics - Media Monitoring - Direct, Formal and Informal	Monthly, ongoing	Communications Manager	ABA, HIA (Milestones)
End of Program Outcome	All stakeholders in across the value chain are informed and engaged					

IMPACT
Longer term Accomplishment
Improved protocols and access to new markets
Reduced regulatory costs
Increased export volumes
Increased profitability
Reduced regulatory burden
Improved reputation for reliability
Increased export volumes
Reduced tariffs
Greater trade volumes
Improved returns
Continued trade
Improvements to phytosanitary conditions
Industry adoption of new requirements
Reduced compliance costs
Trade continues without disruption
Maintain reputation
Increased trade volumes
Higher market returns
Higher market returns
Maintain reputation
Increased trade volumes
Higher market returns
Increased trade volumes
Australian almonds become nut of choice
Increased sales volumes
Almond consumption increases

PRIORITIES	INPUTS	OUTPUTS		OUTCOMES		IMPACT
		Strategies	Participation	Short Term accomplishment	Medium term accomplishment	Longer term accomplishment
Objective 4: Provide a Supportive Operating Environment (Skills & Communication) Support industry development through enhancement of the operating environment (i.e. leadership, skills development, partnerships, communication, extension, R&D resources). Strategy 4.1 Enhance skills and capacity to support current and future industry needs Strategy 4.2 Develop and deliver effective R&D programs that support the Strategic Plan Strategy 4.3 Support adoption of R&D outcomes by effective extension Strategy 4.4 Facilitate the two-way flow of information through the value chain	Hort Innovation funding Findings from R&D projects ABA market development team ABA management and administration ABA Communications: • website • grower database • email database • Grower Forums • 'In A Nutshell' e-zine • Best Practice Fact Sheets • Video communications • Email blasts • Press Releases • Media Interviews • Social Media • Annual Report • Almond Insights • Seasonal updates & export reports Communities of practice: • Hort Innovation • Researchers • Laboratories • Growers / levy payers • Processors / marketers • Exporters • Retailers • Importers • Govt regulators • Govt negotiators • RTO's • Nurseries • Media • IPM experts • NRS program • Agrichemical companies • Transport	Coordinate and hold regular meetings with network of Industry Development Professionals	• All stakeholders	Identification of new and emerging issues and priorities	Identify solutions and R&D projects Set strategic direction for the almond industry	Industry capacity is enhanced through increased skills, development and investment
		Publish and provide input and collaboration on ABA publications and communications	• Hort innovation • Researchers • Laboratories • Processors / marketers • RTO's • Nurseries • IPM experts • NRS program • Agrichemical companies	All stakeholders across the value chain are informed and engaged	Data delivered in publications and communications is used in decision making	Industry capacity is enhanced through increased skills, development and investment
		Provide input to enable publishing and dissemination of seasonal updates and export reports on a regular basis	• Growers / levy payers • Processors / marketers • Exporters • Importers	Extension & of R&D outcomes	High level uptake of R&D outcomes by industry	Proportion of stakeholders and value chain participants accessing ABA publications and communications increases
		Conduct annual workshops/forums in the major almond growing regions	• Hort innovation • Researchers • Laboratories • Growers / levy payers • Processors / marketers • Exporters • IPM experts • NRS program • Agrichemical companies	Enhanced forward planning ability	Decision making across all areas of the almond supply chain are supported through access to timely & relevant information	All stakeholders across the value chain are informed and engaged
		Provide input/present/attend industry Research & Development forums and Conferences	• Hort innovation • Researchers • Laboratories • Growers / levy payers • Processors / marketers • Exporters • Retailers • Importers • Govt regulators • Govt negotiators • RTO's • Nurseries • Media • IPM experts • NRS program • Agrichemical companies • Transport	Development and information exchange of R&D outcomes solutions and priorities to address regional issues	All stakeholders across the value chain are informed and engaged High level uptake of R&D outcomes by industry	Industry capacity is enhanced through increased skills, development and investment
		Contribute to the development of the almond industry strategic R&D plan (2017 -2022)	• All stakeholders	R&D results reported to industry	All stakeholders across the value chain are informed and engaged High level uptake of R&D outcomes by industry Investment in Australian almond industry increases	Industry capacity is enhanced through increased skills, development and investment
				Identification of new and emerging issues and priorities	Prioritisation of industry issues Identification of R&D solutions	Industry has a strong R&D plan R&D projects commissioned achieve outputs