

Final Report

Almond industry statistics and data collection 2020-2022

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Delivery partner:

Almond Board of Australia

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Almond industry statistics and data collection (2020-2022)

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Public summary

The Almond Industry Statistics and Data Collection Project is the cornerstone of verifying the growing and marketing credentials of the Australian almond industry.

Two key publications, the Annual Almond Industry Statistics Report and the Monthly Sales Position Report, contains data and statistics that encompass the production, export and domestic sales of Australian almonds. Along with global comparisons, the services delivered in this project form a critical benchmarking role that assists in guiding investment decisions at all levels. The Almond Board of Australia plays a fundamental and trusted role in collecting and aggregating sensitive supply chain information from growers and processors as well as reputed global sources, by way of annual surveys, estimates, monthly reports and strategic alliances.

These reports, which are underpinned by the co-operation of industry stakeholders, are regarded within the industry and beyond to be among the most informative and comprehensive in Australian horticulture.

During the course of the project, the content of the monthly Position Reports was enhanced to include domestic sales figures for the first time and provide a whole-of-industry sales update, similar to that published by the Almond Board of California. This has provided meaningful comparisons and helped stakeholders identify potential trends as well as areas of opportunity and threat.

Keywords

Australian Almond Industry Statistics and Data Collection

Introduction

The Australian almond industry continues to grow exponentially, having gone from just over 8,500 tonnes of production in 2000 to 143,805 tonnes in the 2022-23 season. Over the same period, plantings have increased from 3,500 hectares in 2000 to over 60,463 hectares by 2022. In 2021-22 Australian almond exports were valued at \$609 million – making it the highest valued export crop in Australian horticulture.

The Almond Board of Australia has had a long history in developing accurate and reliable industry statistics and data. These production statistics have proven to be a fundamental resource to manage growth at an industry level as well as at the various stakeholder levels: growers, processors, service providers, marketers, research or buyers. However, the value of this project extends well beyond the supply chain. In an age where reliable data is regarded as one of the most valuable resources in any business, the Almond Industry Statistics and Data Collection Project continues to compile data that is utilised even beyond the farm gate. The industry data collected through this project underpin crucial research and development funding decisions, facilitate access to key decision makers at all levels of government, along with playing an increasing influential role on the global stage.

During the project period, the industry has continued to grow unabated and is on the precipice of another growing boom that could see plantings exceed 75,000 hectares.

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. Crucial for stakeholders as part of strategic industry planning, the project also delivers domestic and international production and sales data. Processing capacity has become an issue within the industry due to the ongoing growth and the Project has contributed to investment decisions around the expansion or establishment of new infrastructure to address the shortfall.

Research and development investment plans, underpinned by the statutory R&D levy managed by Hort Innovation, also relies heavily on the Project deliverables to help budget, priorities and allocate expenditure of grower funds.

During the latter half of this project, the Australian almond industry was in crisis when NSW beehives were locked down during a biosecurity emergency that followed the discovery of varroa mite in northern NSW. The industry utilised the project deliverables in a wide range of meetings to advocate for lifting beehive movement sanctions and quantifying the impacts of the restrictions. Industry statistics were often quoted by representatives in countless media interviews to educate both the journalists and the public on the size of the problem.

Aside from the two aforementioned publications, other areas where the Project's deliverable have been used include:

- Board and Committee briefing notes
- Quarterly industry newsletter (In A Nutshell)
- e-blasts, media releases
- Monthly email news to industry (Almond Bytes)
- Crop forecast reports
- International Nut Congress global production reports
- Social media
- Presentations to various stakeholder forums
- Government briefings
- Advocacy with government agencies (eg: DAFF, Murray Darling Basin Authority)
- Hort Innovation staff

Methodology

The collaborative nature of the Australian almond industry and its advisory structure facilitates an effective data collection and dissemination program and provides a strong foundation for the industry statistics 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 four of the five major marketers are represented on the ABA Board of Directors. The Board also has seven grow Directors representing the growing regions and chairing Committees covering Production, Water, Pollination, Processing and Plant Improvement.

The Board, MDC and ABA staff oversee the industry's statistical requirements from the following perspectives.

- Plantings
- Tree varieties and rootstocks
- Beehive requirements
- Water efficiency and availability
- Production volumes
- Forecast supply
- Demand (domestic and international sales and shipments by volume and value)
- Domestic imports
- Crop quality parameters and challenges (eg: wet season)
- Global pricing
- Product development
- Input requirements – current and in future)
- Processing capacity

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 across the supply chain.

The initial analysis of the data is undertaken by:

- The ABA CEO, Tim Jackson. Tim has 14 years' experience in the almond industry, including a long-term stint on the Market Development Committee and as a Board director, as well as the former Group Sales and Marketing Manager of the nation's largest almond co-operative, Almondco.
- The ABA Finance Manager, Shannon Harkins. Shannon has been with the organisation for 12 years and manages the industry database and accounts.
- The ABA Market Development Manager, Joseph Ebbage. Joseph has been a member of the Australian Market and Social Research Society for more 17 years.

The project's data is supplemented by market research from Innova, Nielsen and specifically funded work undertaken by a range of specialist external contractors as required by the ABA.

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 collection and input, report production and distribution.

Industry participant information is constantly updated. Information is collected through the ABA membership process and attendance at ABA conferences, forums, field days, trade forums and ad hoc requests to be added. Reviews of the database are conducted regularly 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 confidential and collated on a monthly basis, with information distributed as aggregated, whole of 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. During 2022 the ABA initiated work to upgrade the database to further enhance targeted communication with specific groups within the supply chain. It is hoped this will also include an online portal for grower surveys and will encourage greater interaction with the ABA website.

Annual Almond Planting Survey – The Australian almond planting survey assesses almond plantings by age, variety, state, region, tree spacing, irrigation type and pollination needs. The surveys are distributed to all Australian almond growers and request growers update their plantings from the previous' years planting survey. If the planting is a new or different property, a new blank planting survey is supplied, and 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 benefits 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 provides an early indication of the upcoming crop after it has set, based on growers' seasonal outlooks provided to their industry processor/marketer. Further crop estimates are produced, one prior to harvest, one following receipt when crack-out information is more informed and the last following the completion of hulling by all processors.

Please note that due to the uncertainty around the impact of flooding late in 2022, the opening forecast for 2023 was postponed until January, 2023 instead of December 2022.

The annual crop estimates are disseminated as a whole of industry figure, including the 1,000 tonnes of non-ABA member production, to maintain commercial in confidence arrangements. This information is used for harvest and processing logistics, the development of domestic and export marketing plans and passed onto the International Nut Council for inclusion in the global production update.

Monthly Position Reports – Monthly almond sales information is reported to the ABA from marketer members. Information provided is by variety, product type, and tonnes for the domestic and export market destinations. A monthly position report is produced for domestic and export markets and distributed to the ABA Board and Market Development subcommittee whose members trade 99% of the total industry's crop.

This would not be possible without the full co-operation and transparency of the five marketers who submit their sales data to the ABA on the understanding that the specifics will remain confidential and be aggregated to project an industry position. The information helps guide the industry's marketing program directed by the Market Development Committee. In California, the almond Position Report collects its data via the USDA which records all sales as part of its legislative reporting obligations. Market trends are analysed and compared against that of the US almond industry.

Export reports contain both in-shell and kernel tonnages, with the aggregated total of the kernel weight basis aligning with production weight terminology. The domestic market report provides data on imports into Australia on a monthly basis. Both reports include tables to highlight trends and provide comparisons against previous years.

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, ANIC, 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, tables, and with infographics throughout the report. For the first time, the 2022 publication was been designed as an e-booklet in 2022 to ensure the document remains a live up to date version and can include footage of the various aspects covered in the publication. To reduce landfill, the publication has not been printed, but offered as a downloaded printable PDF version. QR codes will be used at Trade Shows for those wishing to obtain a copy.

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

Photos/images/other audio-visual material



Results and discussion

The 2020-2022 Statistics and Data Collection Project has continued to evolve and become a flagship initiative for the Almond Board of Australia. It provides information that is being used more widely than ever before. As almond production continues to grow and heads towards 200,000 tonnes in the next 3-5 years, it has never been more important to harvest as much industry wide data as possible to assist stakeholders throughout the supply chain and beyond make informed decisions on investment. The Australian almond industry is a relatively young industry compared to many other commodities grown in the country, but its expansion has driven the need for further research and development to improve product quality and on-farm efficiencies with a range of inputs including water and chemicals. This project serves to help identify areas of Research, Development and Innovation but also provide a level of confidence that it has the critical mass to resource long term industry-driven research projects. Just as the industry grows, so has the appetite for data, and it is inevitable that the Project's brief will continue to evolve and incorporate more measures. The obvious new horizon will be capturing independently verifiable sustainability metrics to meet the consumer demand for a better understanding on where the industry sits on its Environmental, Social and Governance (ESG) commitments. It has never been as important to be able to deliver positive results across this triple bottom line of People, Planet and Prosperity.



Above and below: Insights planting data. Varieties used as expansion continues has become critical.

PLANTINGS

VARIETY	HECTARES
PRICE	4,096
MONTEREY	6,738
CARMEL	14,251
NONPAREIL	27,543
OTHERS	7,835
TOTAL HECTARES	60,463

46%
OF AUSTRALIAN
PLANTINGS ARE
NONPAREIL

ALMOND PLANTINGS BY VARIETY (Hectares)

VARIETY	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	GRAND TOTAL
BAXENDALE												9.0
BUTTE				9.9								60.9
CAPELLA			0.5									0.5
CARINA			0.6		3.6	89.4	107.4	108.1	3.2	86.2	78.5	477.1
CARMEL	463.1	34.4	87.9	146.3	231.5	760.5	1,354.4	1,025.6	945.0	558.4	100.9	14,251.2
CHELLASTON												7.7
FRITZ												61.1
INDEPENDENCE				71.6	78.0	177.2	132.47	60.0	24.0	22.9	1.2	567.7
JOHNSTON	0.2				0.0			1.2				30.7
KEANE			1.5			0.9	0.2				0.2	66.6
MAXIMA			0.6			48.8	4.7	16.3		0.8		71.2
MIRA			0.5			5.4	3.0	22.8		1.8		33.5
MISSION												13.9
MONTEREY	171.3	17.6	71.0	88.1	522.2	1,302.4	1,795.9	1,079.9	970.4	406.4	2.0	6,737.6
NE PLUS	0.2	0.5			2.6	0.3					0.2	149.6
NONPAREIL	734.8	64.7	181.6	335.4	995.2	2,765.8	3,144.4	2,210.2	2,255.9	1,459.5	221.2	27,543.4
OTHER					49.2	2,209.0	172.9	92.5	351.8	319.3	242.5	3,454.2
PADRE				9.9								56.3
PEERLESS	1.8	1.94	2.2	13.2	8.0	42.0	3.6				34.0	487.3
PRICE	94.6	10.61	14.9	46.5	124.8	270.4	141.2	146.3	1.8	6.1	0.2	4,096.1
RHEA			0.6			15.0						15.6
SOMERTON						0.0						14.5
WOOD COLONY	3.1		0.2	28.4	120.4	968.4	645.9	92.2	205.0	193.0		2,256.6
GRAND TOTAL	1,469.1	129.7	362.2	749.1	2,135.4	8,655.5	7,506.1	4,855.0	4,757.2	3,054.5	680.8	60,463.3

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PRODUCTION

ALMOND PRODUCTION PAST & PRESENT (KERNEL TONNES)

2022	143,805**
2021	124,499**
2020	114,427
2019	104,437
2018	79,901
2017	79,477
2016	82,333
2015	82,509
2014	65,060
2013	73,361
2012	49,585
2011	37,626
2010	39,081

* ESTIMATE based on marketers' assessments. ** FORECAST based on plantings data.

AUSTRALIAN PRODUCTION BY STATE

VIC	73,841	59%
SA	28,348	23%
WA	347	0%
NSW	21,936	18%



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Production and Sales data are critical considerations for a range of Research and Development and Marketing investments.

AUSTRALIAN EXPORT AND DOMESTIC SUPPLY (MARKETING YEAR)
KERNEL WEIGHT EQUIVALENT



ASIA PACIFIC OCEANIA 76%

ASIA PASIFIC OCEANIA 76%

EUROPE 16%

MIDDLE EAST & AFRICA 7%

AMERICAS 1%



Source: IMF.

[illegible]

EXPORT

November
2022

POSITION REPORT

World Destinations		2022			2021			2020			2019			2018			2017			2016			2015			2014			2013			2012			2011			2010			2009			2008			2007			2006			2005			2004			2003			2002			2001			2000			1999			1998			1997			1996			1995			1994			1993			1992			1991			1990			1989			1988			1987			1986			1985			1984			1983			1982			1981			1980			1979			1978			1977			1976			1975			1974			1973			1972			1971			1970			1969			1968			1967			1966			1965			1964			1963			1962			1961			1960			1959			1958			1957			1956			1955			1954			1953			1952			1951			1950			1949			1948			1947			1946			1945			1944			1943			1942			1941			1940			1939			1938			1937			1936			1935			1934			1933			1932			1931			1930			1929			1928			1927			1926			1925			1924			1923			1922			1921			1920			1919			1918			1917			1916			1915			1914			1913			1912			1911			1910			1909			1908			1907			1906			1905			1904			1903			1902			1901			1900			1899			1898			1897			1896			1895			1894			1893			1892			1891			1890			1889			1888			1887			1886			1885			1884			1883			1882			1881			1880			1879			1878			1877			1876			1875			1874			1873			1872			1871			1870			1869			1868			1867			1866			1865			1864			1863			1862			1861			1860			1859			1858			1857			1856			1855			1854			1853			1852			1851			1850			1849			1848			1847			1846			1845			1844			1843			1842			1841			1840			1839			1838			1837			1836			1835			1834			1833			1832			1831			1830			1829			1828			1827			1826			1825			1824			1823			1822			1821			1820			1819			1818			1817			1816			1815			1814			1813			1812			1811			1810			1809			1808			1807			1806			1805			1804			1803			1802			1801			1800			1799			1798			1797			1796			1795			1794			1793			1792			1791			1790			1789			1788			1787			1786			1785			1784			1783			1782			1781			1780			1779			1778			1777			1776			1775			1774			1773			1772			1771			1770			1769			1768			1767			1766			1765			1764			1763			1762			1761			1760			1759			1758			1757			1756			1755			1754			1753			1752			1751			1750			1749			1748			1747			1746			1745			1744			1743			1742			1741			1740			1739			1738			1737			1736			1735			1734			1733			1732			1731			1730			1729			1728			1727			1726			1725			1724			1723			1722			1721			1720			1719			1718			1717			1716			1715			1714			1713			1712			1711			1710			1709			1708			1707			1706			1705			1704			1703			1702			1701			1700			1699			1698			1697			1696			1695			1694			1693			1692			1691			1690			1689			1688			1687			1686			1685			1684			1683			1682			1681			1680			1679			1678			1677			1676			1675			1674			1673			1672			1671			1670			1669			1668			1667			1666			1665			1664			1663			1662			1661			1660			1659			1658			1657			1656			1655			1654			1653			1652			1651			1650			1649			1648			1647			1646			1645			1644			1643			1642			1641			1640			1639			1638			1637			1636			1635			1634			1633			1632			1631			1630			1629			1628			1627			1626			1625			1624			1623			1622			1621			1620			1619			1618			1617			1616			1615			1614			1613			1612			1611			1610			1609			1608			1607			1606			1605			1604			1603			1602			1601			1600			1599			1598			1597			1596			1595			1594			1593			1592			1591			1590			1589			1588			1587			1586			1585			1584			1583			1582			1581			1580			1579			1578			1577			1576			1575			1574			1573			1572			1571			1570			1569			1568			1567			1566			1565			1564			1563			1562			1561			1560			1559			1558			1557			1556			1555			1554			1553			1552			1551			1550			1549			1548			1547			1546			1545			1544			1543			1542			1541			1540			1539			1538			1537			1536			1535			1534			1533			1532			1531			1530			1529			1528			1527			1526			1525			1524			1523			1522			1521			1520			1519			1518			1517			1516			1515			1514			1513			1512			1511			1510			1509			1508			1507			1506			1505			1504			1503			1502			1501			1500			1499			1498			1497			1496			1495			1494			1493			1492			1491			1490			1489			1488			1487			1486			1485			1484			1483			1482			1481			1480			1479			1478			1477			1476			1475			1474			1473			1472			1471			1470			1469			1468			1467			1466			1465			1464			1463			1462			1461			1460			1459			1458			1457			1456			1455			1454			1453			1452			1451			1450			1449			1448			1447			1446			1445			1444			1443			1442			1441			1440			1439			1438			1437			1436			1435			1434			1433			1432			1431			1430			1429			1428			1427			1426			1425			1424			1423			1422			1421			1420			1419			1418			1417			1416			1415			1414			1413			1412			1411			1410			1409			1408			1407			1406			1405			1404			1403			1402			1401			1400			1399			1398			1397			1396			1395			1394			1393			1392			1391			1390			1389			1388			1387			1386			1385			1384			1383			1382			1381			1380			1379			1378			1377			1376			1375			1374			1373			1372			1371			1370			1369			1368			1367			1366			1365			1364			1363			1362			1361			1360			1359			1358			1357			1356			1355			1354			1353			1352			1351			1350			1349			1348			1347			1346			1345			1344			1343			1342			1341			1340			1339			1338			1337			1336			1335			1334			1333			1332			1331			1330			1329			1328			1327			1326			1325			1324			1323			1322			1321			1320			1319			1318			1317			1316			1315			1314			1313			1312			1311			13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- Values represented as a "+" are an absolute zero
- Values represented as a "-" contain figures past the decimal heading to what they appear to be abnormal percentages

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This project has been funded by Fiat Innovation using the shared research and development levy and funds from the Innovation Voucher scheme.

Export Shipments Monthly Totals (Marketing Year)

KWE Shipments	% Change From Prev Yr	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
March	49%	2,832	1,899	1,306	1,279	1,378	1,547	1,666	3,626	3,172	2,163	1,835
April	4%	5,178	4,987	3,321	5,200	4,148	4,042	3,366	3,878	4,821	2,478	2,739
May	-28%	7,035	9,791	6,017	9,634	7,287	7,312	6,797	7,589	7,514	4,009	4,486
June	3%	9,780	9,506	8,017	13,754	7,148	7,481	8,562	9,765	7,370	5,227	3,630
July	-19%	12,461	15,311	8,919	13,997	11,398	9,451	9,273	10,308	7,537	7,093	3,786
August	16%	13,935	11,978	10,214	11,707	8,902	10,263	7,114	8,456	6,242	6,254	3,397
September	50%	14,348	9,085	9,214	6,144	6,743	5,269	6,214	5,961	3,788	6,995	3,105
October	83%	11,570	6,339	10,078	4,735	3,941	3,463	6,056	4,080	2,990	4,500	3,173
November	37%	9,262	6,749	8,569	4,918	3,663	1,921	3,553	2,658	1,505	2,857	2,076
December	-	-	5,664	5,619	2,325	4,412	1,731	2,599	1,473	2,100	2,877	940
January	-	-	2,789	2,674	1,417	1,104	1,056	2,106	923	1,340	1,928	814
February	-	-	2,486	2,545	947	772	806	1,658	590	1,362	2,406	1,065
Total MT		86,402	86,584	76,693	76,556	60,894	54,343	58,964	59,307	49,751	48,788	31,047

Domestic Shipments Monthly Totals (Marketing Year)

KWE Shipments	% Change From Prev Yr	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
March	14%	2,375	2,089	2,190	2,149	1,880	1,660	2,012	1,793	1,724	966	1,292
April	-2%	1,893	1,940	1,970	1,886	1,739	1,248	1,997	1,657	1,735	1,203	1,090
May	-18%	1,895	2,319	2,369	2,122	1,915	2,076	1,252	1,978	1,481	1,605	1,329
June	-8%	2,079	2,265	1,953	2,135	1,883	1,472	2,107	1,746	1,259	1,271	1,392
July	-9%	2,002	2,205	2,731	2,103	1,959	1,994	1,801	1,763	1,711	1,692	1,440
August	-22%	1,971	2,537	2,672	2,510	2,094	2,394	1,956	1,969	1,858	1,732	1,540
September	-14%	2,209	2,562	2,586	2,283	2,151	2,252	2,094	2,112	2,136	1,953	1,457
October	-16%	2,304	2,741	2,696	2,702	2,168	2,263	2,160	1,802	1,955	2,135	2,064
November	5%	2,103	2,004	2,928	2,265	2,432	2,204	2,345	2,034	1,963	2,056	1,865
December	-	-	1,961	2,159	1,546	1,619	2,040	1,370	1,391	1,036	1,168	1,184
January	-	-	1,866	1,825	2,157	1,671	1,441	1,432	984	1,348	1,311	847
February	-	-	1,973	2,037	1,896	1,347	1,530	1,749	1,479	1,220	1,262	1,149
Total MT		18,831	26,463	28,114	25,755	22,858	22,574	22,775	20,708	19,405	18,356	16,850

Combined Shipments Monthly Totals (Marketing Year)

KWE Shipments	% Change From Prev Yr	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
March	31%	5,207	3,988	3,496	3,428	3,258	3,207	3,678	5,419	4,896	3,129	3,127
April	2%	7,071	6,927	5,491	7,586	5,887	5,290	5,362	5,535	6,555	3,681	3,829
May	-26%	8,930	12,110	8,386	11,756	9,202	9,388	8,549	9,567	8,995	5,615	6,015
June	1%	11,859	11,771	9,970	15,889	9,030	8,953	10,669	11,511	8,629	6,499	5,022
July	-17%	14,463	12,516	11,649	16,100	13,357	11,446	11,074	12,072	9,248	8,785	5,226
August	10%	15,906	14,516	12,887	14,217	10,996	12,658	9,070	10,425	8,101	7,986	4,938
September	42%	16,557	11,647	11,798	8,427	8,894	7,520	8,308	8,072	5,934	8,948	4,562
October	53%	13,875	9,080	12,774	7,437	6,109	5,726	8,216	5,882	4,925	6,635	5,236
November	30%	11,364	8,753	11,497	7,183	6,095	4,125	5,899	4,693	3,468	4,914	3,942
December	-	-	7,625	7,722	3,871	6,051	3,772	3,968	2,864	3,136	4,045	2,124
January	-	-	4,655	4,500	3,574	2,774	2,496	3,538	1,908	2,688	3,239	1,661
February	-	-	4,459	4,582	2,843	2,119	2,336	3,407	2,069	2,581	3,668	2,214
Total MT		105,233	113,048	104,807	102,312	83,752	76,918	81,739	80,015	69,156	67,144	47,897

Position Reports are calculated on a marketing year basis (March - February). Totals are reported on Kernel Weight Equivalent - where kernel product is converted to % to kernel weight. All reports are in Metric Tons (MT). Kernel product is reported that has had the hull removed but not the shell. Kernel product has had both hull and shell removed.

PRODUCED IN AUSTRALIA

100 Bushel per Metric Ton (MT)
 1 MT = 1.1023 TON
 1 TON = 0.907 MT

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Hort
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ALMOND
FUND

This project has been funded by Hort Innovation using the almond research and development levy and funds from the Australian Government. For more information on the fund and strategic levy investment visit horticulture.com.au

A new innovation in the Monthly Position Reports has been the inclusion of Domestic Sales data for the first time.

Outputs

The ABA has delivered the required outputs as outlined in the Project Framework and has utilised the data in hundreds of media reports and internal briefings during the Project life. The key resources have been the monthly Position Report and the annual Insights publications, which are still available online. As stated below in the Meltwater media monitoring data, the Almond Board of Australia has featured in 470 media reports during 2022 and in many of the articles, the statistical data provides invaluable background and perspective to the issues of the day. Ongoing work as well as upcoming research and marketing initiatives, both locally and aboard, have been borne out the necessity to meet the increasing supply that the statistical data has revealed.

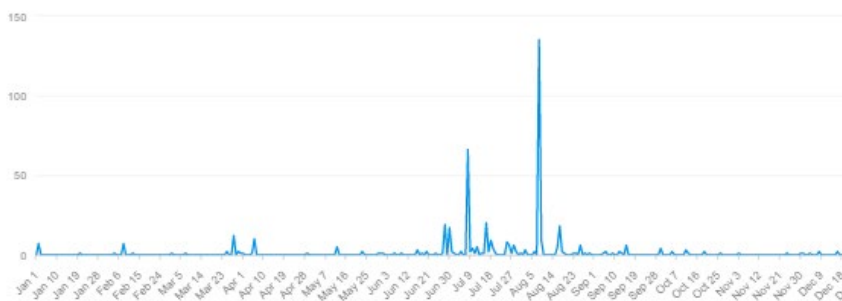
Table 1. Output summary

Output	Description	Detail
A program logic and monitoring evaluation plan with linkage to Hort Innovation and industry/fund objectives	As per the 2022-26 industry HIA Strategic Investment Plan (SIP) the project has strived to meet the fundamental need to ensure it provides the type of data that ensures the ABA has “an informed industry that adopts R&D outcomes and has the capacity to support current and future industry needs”.	The ABA helps fund almost 30 projects and most have in part required some type of statistical justification and are aligned with the 2022-2026 SIP. The ongoing support of stakeholders is a strong indicator of the ABA structure and has ensured the accuracy and validity of the data and statistics. A range of advisory committees including Market Development and Production, serve as critical evaluation forums in upholding the credibility of the data presented. It should be noted that the ABA, in co-operation with Hort Innovation, have also helped facilitate an independent evaluation of this project delivered by AgEcon, which involved consultation with a range of internal and external stakeholders to provide feedback by way of a one-on-one interview. The results of this project are due this month (February 2023) and should provide further insights into the value of the project. Key areas covered across participants were: • Project delivery (KEQ: appropriateness, efficiency) • Data collection processes (KEQs: appropriateness, efficiency) • Industry and project involvement/awareness (KEQs: engagement, accessibility [suggested additional KEQ]) • Benefits of the project (KEQs: relevance, effectiveness, benefits) • Project development (KEQs relevance, benefits)
A project register and how risks will be managed	A risk matrix providing solutions, perceived risk levels and identifying parties responsible for managing the risk.	Obtaining inaccurate or unreliable data was identified as the key risk in this project. The risk was identified was low to medium. The experienced ABA team saw the risk levels as acceptable given the team’s experience and knowledge to sense check the credibility of the data. • See Attachments for Project Risk Register.
Annual planting survey	The hand-written survey is mailed to all growers in the industry.	The level of detail in this survey is critical to maintaining up to date information. The ABA plans to take the annua survey online, providing growers with a more expedient way to complete the survey and also assist staff with aggregating data through a database in the future. The current surveys are administered manually after hand-written forms are submitted. Growers who have made changes to their orchard are requested to submit their changes. It was noted that some growers had not responded the previous year

		but had included two years of data. In the future this will be “ground-truthed” by the ABA’s commitment to biennially spatial map all plantings in the industry.
Annual statistics publication	Insights	The annual publication is the bible of the industry and covers almost every aspect of growing and marketing almonds. Link: Almond Insights 2021-22 (joomag.com) Almond Insights 2018-19, Almond Insights 2019-20 (PDF format)
Monthly Position Reports	Position Reports	The monthly position reports aggregate Australian Bureau of Statistics data with Marketer and Processor data to produce export and, as of March, 2022, domestic sales numbers by type and market were included. This is the first time that the report has included domestic sales and the Position Reports are published within 24 hours of the Almond of California Position Report. These reports are published across the industry and beyond. 36 monthly reports were produced during the course of the project. Link: Publications - Australian Almonds
Media releases x 6	Crop forecasts, End of Season results and Industry Insights announcements	Media releases around the crop forecasts, insights data, export, plantings, as well of end of season insights, have been the subject of various media releases.
Support to broader communications plan	Data and statistics have been cited in almost all broader communications during the project period.	During 2022, the ABA was quoted almost 300 days out of 365 (source: Meltwater Monitoring service) in one form of media or another, both locally and abroad. In almost all articles, some aspect of data or statistical information produced through this project was quoted to make a point or educate the reader. •See Meltwater diagram of ABA media coverage during 2022 next page.

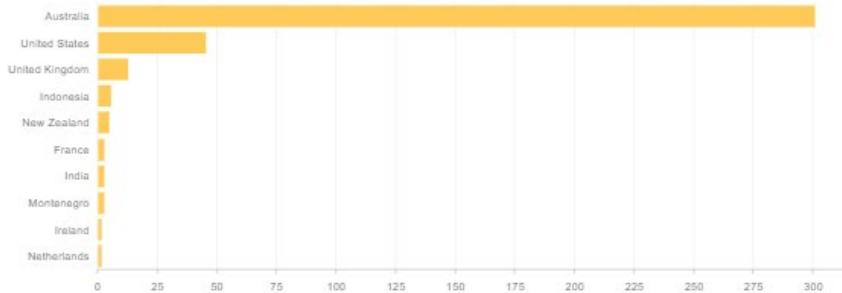
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Mentions Trend ⓘ



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Outcomes

The Project outcomes are closely aligned with the Hort Innovation current and previous Almond Strategic Investment Plan. It is clear that the data collected and published is a critical resource for a wide range of stakeholders associated with the Australian almond industry. It is also clear that this process has become a core activity for the Almond Board of Australia, having developed a reputation as a trustworthy and credible representative body. Its success is also dependent on the collaborative and co-operative nature of all major stakeholders within the industry supporting such activities. Due to the success of the Project, stakeholders have demonstrated a willingness to share further key information that assists in raising the data quality provided. An example of this would be the inclusion of domestic sales in the Position Reports. This relies on marketers sharing their highly sensitive company sales data so it can be aggregated into an industry position.

Table 2. Outcome summary

Outcome	Alignment to fund outcome, strategy and KPI	Description	Evidence
Collection and delivery of timely accurate and robust data providing industry and market intelligence for the almond industry.	In line with meeting strategic outcomes and key performance indicators as cited in parts of the Hort Innovation 2022-2026 Strategic Investment Plan Outcomes 2, 3 and 4. SIP, Outcome 2 – Demand creation is based on understanding the current market spread and formulating marketing strategies of existing, emerging and new markets to absorb increased production. The data compiled in the monthly Position Reports is the foundation of this process. SIP, Outcome 3 – The justification process of investing in improved capability and an innovative culture involves the use of benchmarking data generated through this project on plantings, market development. SIP, Outcome 4 – Making the Australian almond industry more profitable through informed decision-making using consumer knowledge and tracking, trade data, production statistics and forecasting – is underpinned by the core	Over the course of the Project, the data collected has clearly demonstrated the ongoing growth of production and export sales growth.	The 'Supply and Demand' section of the Insights program and the monthly Position Reports have provided annual and more regular "score updates" of the performance of the industry on the international stage. Link: Publications - Australian Almonds Over the project period, export sales have grown from 76,693 tonnes in 2020 to 86,584 tonnes in 2021. The 2022-23 export figures had already exceeded 2021-22 levels with three months remaining as of November 2022. In a global market where our main competitor, California, has been struggling to maintain sales momentum, this data and the destinations involved, have been critical to devising marketing strategies at an industry and individual marketer level.

	activities of this Project.		
Increase in coverage of almond growers through the annual almond plantings survey	SIP, Outcome 3 KPI – ‘Demonstrated growth in co-operation within industry and across industries leading to business and industry innovations. (ie: survey data)’	As the industry has continued to grow with new entrants, a critical component of the statistical review is the ABA staff, directors and committee members developing a network that allows the board to keep abreast of new developments and make contact with key staff to ensure they become part of the data collecting process.	In the past year there has been a concerted process to engage industry newcomers and their key staff and raise awareness of the resources available to them. The ABA staff has also broadened the organisational database to not only include farm owners and senior executives, but also to include key on the ground personnel in new and established companies to ensure a greater level of interaction and awareness on industry matters. At the ABA Conference in October 2022, senior executives from four new entrants to the industry spoke during a panel session on their learnings and have subsequently all become members of the ABA and been recruited to various advisory committees within the organisation. This involvement helps build an understanding and collaborative “whole of industry approach” fostered by the ABA over a long period of time.
Provision of industry data that facilitates efficient industry strategic planning and resource prioritisation at both the industry and enterprise level through identification of production and market trends and forecasting outcomes. By making better business decisions the current viability and sustainability of the Australian almond industry	In line with meeting strategic outcomes and key performance indicators as cited in parts of the Hort Innovation 2022-2026 Strategic Investment Plan Outcomes 2, 3 and 4.	The ABA Market Development Committee relies on the data provided by this Project to make informed decision around creating demand in existing, emerging and new export markets.	The growing reliance on export sales to China and price premium, has led to the ABA working with marketers, DFAT and Hort Innovation in the development of an export marketing diversification plan. Emerging opportunities in the Middle East along with new frontiers in South-East Asia.

will be enhanced.			
Delivery of data, statistics and insights leverages the industry communications program to maximise industry engagement and awareness and provides increased depth and rigor to communication materials delivered to industry stakeholders.	SIP, Outcome 3 – Delivering extension and communication capabilities and business insights to support positive change in the areas of productivity and demand. By establishing a baseline and then consistently updating the data, the project has allowed the industry to demonstrate growth and drive positive change in knowledge, attitude, skills and aspiration within the industry and beyond.	The Almond Board of Australia has featured in media reports on a wide range of topics. In the final year of the project alone, Meltwater media monitoring revealed that the ABA had featured in almost 300 media reports around the world. Almost all of these reports cited statistical data generated by this Project.	During the height of the beehive lockdown that occurred in the middle of 2022, the ABA were advocating for Victorian growers to have access to NSW beehives. The statistical data, specifically production rates by state and pollination stocking rates, were critical to calculating the shortfall and the potential economic impact to growers and their communities. It was clear from the ABA CEO's experience in managing the media enquiries, that the knowledge of the industry was very low. Providing inquisitive journalists with a one stop resource on almond production assisted in accurate, credible data being reported.

Monitoring and evaluation

The most effective evaluation of the data collection process is the internal scrutiny the work is subjected to by industry stakeholders throughout the supply chain. While the ABA is committed to continual improvement and has plans to further enhance the project sources in the future, the current process is viewed widely as reliable and integral to the industry and beyond. A higher level of interaction with data (ie. offering the report in an editable Excel spreadsheet) to assist stakeholders with tailored analysis of the Position Report is being considered for the 2023-24 season.

There is also plans to introduce an online portal to improve efficiencies around the annual Growers Plantings Survey which currently involves completing hand-written survey sheets.

Table 3. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
To what extent has the project achieved its expected outcomes?	The two key publications generated through the work of this Project have evolved to meet the increasing demand for more information about the industry. The Insights publication continues to evolve as a one-stop shop for all statistical information about the industry.	The Insights publication has been switched to an e-document to ensure it can be updated throughout the year with new materials. Using specialized publication software, the document can be downloaded as a printable PDF but also be viewed online and feature video inserts on a range of topics. It is

	- An additional feature implemented in the Insights publication was the findings of a regional economic impact study of the industry in its growing regions (AL19004 Economic Analysis RMCG). - Position Report were also bolstered by the inclusion of monthly domestic sales numbers for the first time. Before the 2022 season, this report was exclusively an export sales report that did not portray the full extent of the industry's sales activities.	intended that these will be updated during the year and include insights around sales trends, sustainability initiatives and crop forecast. It would also move away from printing glossy colour brochures that may or may not be used or current. By producing a live document, the Insights publication becomes an ongoing up to date resource for users instead of the traditional date in time record.
How relevant was the project to the needs of intended beneficiaries?	The ongoing growth of the industry means stakeholders at all levels rely on the statistical data provided to guide investment decisions at all levels: industry, processing and on-farm. It aims to capture the key metrics in all these fields. What we grow, how we grow it, what impact is that having on growers and their communities and where the marketing opportunities are emerging.	Greater information on the sustainability initiatives on farm and in processing has been recognised as a key component of any statistical document showcasing the industry. Metrics around carbon footprint, water efficiency, chemical use and bee friendly behaviours will need to be captured in future projects to help fortify the industry's ESG credentials.
How well have the intended beneficiaries been engaged in the project?	The success of the project relies on the participation of industry stakeholders. The planting survey process relies on growers reporting back their orchard changes. At a marketing level, the support and co-operation of the five marketing companies is the lynchpin to provide credible Position Reports.	An online portal to reduce the impost on time spent relaying key data for the planting survey has been identified as the way forward. This will hopefully reduce time spent at a grower level but also speed up the aggregation process within the ABA. It is hoped this portal is operational for the 2024 reporting project.
To what extent were engagement processes appropriate to the target audience(s) of the project?	In an industry with less than 200 growers, the engagement is often personal. At a grower level, our team have relationships with many established growers and there has been a concerted effort to acquaint new entrants to the industry with the importance of participating in this project. In some cases this has involved on-farm visits and follow up phone calls by ABA staff.	We recognise that growers have a lot of pressures on their time, so improving the engagement by streamlining the process via a portal that reduces handwritten submissions will assist in building the relationship. A new CRM module within our database will also allow us to communicate directly with growers from specific region to tailor engagement and ABA visits.
What efforts did the project make to improve efficiency?	Taking the Insights program online and promoting it through various communication channels ensured that the production phase of the document did not require additional printing and distribution logistics. It	Taking the planting survey online will be a huge step forward in streamlining the information gathering process. The ABA has also engaged a spatial mapping consultant to ground truth the

	also presented in a preferred electronic format for ease of distribution and storage.	accuracy of the planting survey. California-based LandIQ will this year produce a comprehensive guide of the number of hectares and the age of the orchards planted. If the Californian experience is any indication this will ensure newcomers to the industry are captured in the data earlier.
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Recommendations

- To make participation in Planting Surveys more convenient and online to streamline data collection.
- To establish and capture key industry-wide sustainability metrics like carbon footprint.
- To make the Insights Statistical Review a live e-document that is updated throughout the year.
- To implement any potential improvements that emerge from the independent evaluation conducted by AgEcon.

Intellectual property

No project IP or commercialisation to report' if there are none to report.

Appendices

1. Position Reports

<https://australionalmonds.com.au/publications/?v=6cc98ba2045f>

January 2022 report

February 2022 report

March 2022 report

April 2022 report

May 2022 report

June 2022 report

July 2022 report

August 2022 report

September 2022 report

October 2022 report

November 2022 report

December 2022 report

The above link provides all position reports across the period of the Project.

2. International data via International Nut Council – Example of stats being used on the global stage.

https://www.nutfruit.org/files/tech/1651218761_Statistical_Yearbook_2021-2022.pdf

3. Example of global media interest in almond industry. The ABA's statistical data is the backbone of quoting credible information.

<https://www.bnnbloomberg.ca/bee-lockdown-to-ease-in-australia-ahead-of-pollination-season-1.1792703>

4. Crop estimates June 8, 2022 and 2023 version January 16, 2023– media releases:

Australian almond crop estimate revised

 Almond Board of Australia <communications@australionalmonds.com.au>
To: Tim Jackson

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.



Wed 8/06/2022 2:35 PM



Australian almond crop estimate revised

The Almond Board of Australia has revised the 2022 Australian crop size down to 138,650 tonnes of saleable product.

The almond industry had forecast a crop of 145,000 before the season earlier this year but ongoing challenges with wet weather across all growing regions has prompted an industry wide review of saleable volumes.

ABA chief executive officer Tim Jackson said ongoing unprecedented rainfall across the south Murray Darling Basin had hampered attempts to complete harvest and reduced the crop potential.



INDUSTRY UPDATE

2023 almond crop estimate announced

The 2023 Australian Almond crop pre-season estimate has come in at 156,200 tonnes (kernel weight equivalent).

This is below previous forecasts but above recent expectations due to the challenges around weather and pollination.

Harvest is expected to be 1-2 weeks late due to the mild growing conditions.
The Australian season extends from March, 2023 to February 28, 2024.