Final Report

Market access, maintenance and development program

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Delivery partner:

Almond Board of Australia

Project code:

AL17008

Project:

Market access, maintenance and development program (AL17008)

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Public summary

Project AL17008, Market Access, Maintenance and Development, made a critical contribution to sustainably growing the Australian almond industry. Australian almond growers, processors, marketers, and exporters working together with the Almond Board of Australia, successfully leveraged the opportunities provided by AL17008 to improved market access, maintain existing customer bases, and grow new market opportunities.

The growth trajectory of the Australian almond industry's planting and production underpins the importance of the Hort Innovation supported market access, maintenance, and development projects. Australian almond production has grown from 8,500 tonnes in 2000 to 143,805 tonnes in 2022-23. Plantings have increased from 3,500 hectares in 2000 to over 60,000 hectares in 2022.

While the over-arching theme of AL17008 was Market Access, Maintenance and Development, the key categories of activity for this project were international export trade missions and exhibitions as well as developing an export-focused website. The project's timeframe was from July 2019 to December 2022. This timeframe was extended by variation due to the disruptions and restrictions caused by the COVID pandemic.

The key project outcomes of AL17008 were achieved. Export sales grew from 60,894 tonnes in 2018-19 to 105,490 tonnes in 2022-23. This growth of 44,596 tonnes, or 73%, over the course of the project aligns with Outcome 2 of the Hort Innovation Strategic Investment Plan in creating demand in new, emerging, and existing export markets. The collaborative approach of the Australian almond industry exporters in relation to growing export markets was strengthened. The collaborative culture relating to export trade missions and exhibitions by Australia's almond growers, processors and exporters is unique in Australian horticulture. It allows the activities to optimize the market development opportunity for Australian Almonds as a trusted brand while providing each Australian exporter the opportunity for individual customer acquisition and growth. The 73% sales growth over the course of AL17008 highlights the achievement of another major project outcome: namely that the brand reputation of Australian almonds was strengthened.

Keywords

Introduction

The growth of the Australian almond industry over the past twenty years and its forecast future growth highlights the critical importance of collaborative industry programs to sustainably develop markets for the almonds the industry grows.

Australia's almond growers have increased the planting of almonds from 3,500 hectares in 2000 to over 60,000 hectares in 2022. This area under planting is forecast to continue to grow over the coming decade. As a result of this increase in planting, production of almonds has grown from 8,500 tonnes in 2000 to 143,805 tonnes for the 2022-23 marketing year. Australian almond production is forecast to grow to 175,000 tonnes in the 2025-26 marketing year and exceed 200,000 tonnes by 2027.

The objective of the Australian almond industry has been to grow its markets sustainably. This involves understanding the future needs of Australia's almond growers, processors, and exporters as well as their immediate requirements. A driving principle of the Australian almond industry's market development program from its inception in 2003 has been to develop demand for Australian almonds ahead of supply.

The principal category of activity within AL17008 was export trade missions. The disruptions and restrictions of the COVID pandemic during 2020-21 led to the extension of the timeframe of the project. It also led to the development of innovative digital communication programs involving online 3D digital exhibitions and video presentations.

The trade missions and exhibitions completed under AL17008 were:

- Sial Paris: October 2022
- Gulfood Dubai: February 2020, February 2021 and February 2022
- China International Tree Nut Conference: August 2019, 2020 and 2021
- Sial China: May 2021
- Supermarket Trade Show Tokyo: February 2020
- Food and Hotel Indonesia: July 2019 and July 2022
- Trade Mission to Kuala Lumpur Malaysia July 2022
- Food & Hotel Asia Singapore September 2022

Note, the exhibitions that took place after March 2020, through to February 2022, were managed by external agencies to represent the Australian almond industry as travel from Australia was restricted.

An export specific website was developed and launched (www.australianalmonds.com) to provide an ongoing communication resource that supports the portfolio of trade missions. During the course of AL19002, several key strategic market development decisions required an alteration to the direction of the export website implementation. Firstly, the serious change in the geo-political relationships between the governments of Australia and China during AL19002 and the impacts of these changes on Australian exporting industries such as the lobster and wine industries led the Australian almond growers, processors and marketers to take a conservative approach to public communications including a China-specific export website. Communication between Australian almond exporters and their Chinese customers was undertaken on a personal basis rather than broadcast publicly via a website. Secondly, as part of a broader strategic review of growing Australian almond exports to Southeast Asia, the view of the Australian almond growers, processors and exporters was to take a pan-regional approach to trade stewardship in Southeast Asia. While markets such as Indonesia, Malaysia and Thailand will be very significant components of this regional market development strategy, the Australian almond exporters indicated that there would be greater value in developing a pan-regional website for the whole of Southeast Asia, rather than just an Indonesia-specific site. (Note, this strategy will be communicated in more detail in the Final Report for project AL19002).

The trade missions and exhibitions highlighted above reflect the strategic market development priorities of Australia's almond growers, processors, and exporters. Over the course of AL17008, export volumes to China have grown significantly. The opportunity for Australia's exporters to focus on China was driven by the tariff advantage provided by the China-Australia Free Trade Agreement and the dispute between China and the USA, which impacted the tariff applying to imports of Californian almonds. The key trade missions to China over AL17008 centered around the China

International Tree Nut Conference and the Sial China trade fair. The Australian almond industry have been participating in these two key trade events for 3 to 5 years respectively, prior to the commencement of AL17008. This early trade development work initiated the customer relationships that were consolidated during AL17008.

India is the second largest, single-country market for Australian almond growers, processors, and exporters. Within AL17008, the Gulfood trade mission and exhibition in Dubai provided the principal opportunity to develop customer relationships with the industry's key Indian trading partners. Gulfood also provides an effective hub to meet with trade partners from the UAE and Türkiye, as well as the Middle Eastern region more broadly.

Europe remains a core regional market for the Australian almond industry. AL17008 provided for an annual exhibition at Sial in Paris and Anuga in Cologne. Note, these exhibitions are biennial. Unfortunately, due to COVID travel restrictions, the Australian almond industry was unable to attend the exhibitions in 2020 and 2021. The only European trade mission within AL17008 was Sial in Paris in October 2022.

Southeast Asia is an important strategic region for export market development for the Australian almond industry. The Covid pandemic highlighted the fragility of the global supply chain. The port closures and lack of freight capacity during the Covid years highlighted the trade advantages of the Southeast Asian market. The key trade exhibitions in this region for the Australian almond industry were Food & Hotel Indonesia, held in Jakarta, and Food & Hotel Asia, held in Singapore. A brief Trade Mission to Kuala Lumpur was also conducted prior to the 2022 Food & Hotel Indonesia exhibition.

AL17008 also provided an opportunity to grow Australian almond exports to Japan. The industry was able to participate in the Japan Supermarket Trade Show in February 2020, prior to the implementation of the Covid travel restrictions. The Australian almond growers, processors and growers were unable to participate in these exhibitions in 2021 and 2022.

To support the trade communication needs Australia's almond exporters, an export-focused website was developed and launched: www.australianalmonds.com. The technology utilized for this site is a 'multi-site, word press' platform. The advantage of this technology platform is that it can 'create and serve' additional market specific sites as required.

Methodology

The trade missions and exhibitions completed under AL17008 were:

- Sial Paris: October 2022
- Gulfood Dubai: February 2020, February 2021 and February 2022
- China International Tree Nut Conference: August 2019, 2020 and 2021
- Sial China: May 2021
- Supermarket Trade Show Tokyo: February 2020
- Food and Hotel Indonesia: July 2019 and July 2022
- Trade Mission to Kuala Lumpur Malaysia July 2022
- Food & Hotel Asia Singapore September 2022

Note, two exhibitions nominated above, Gulfood 2021 and Sial China 2021, were conducted by external agencies to represent the Australian almond industry as travel from Australia was restricted.

An export specific website structure was developed and launched: www.australianalmonds.com.

A key component of AL17008 was the ongoing evaluation of the range of activities undertaken. This evaluation was comprised of two forms: a qualitative evaluation and a quantitative measurement. Every trade activity is qualitatively assessed by the Australian almond exporters in terms of its contribution towards their individual and collaborative industry goals. The Australian almond growers, processors and marketers contribute these qualitative assessments as the conclusion of each activity and at the quarterly Almond Board of Australia (ABA) Market Development Committee meetings. The quantitative assessments are principally centered on the ABS export statistics. These statistics are analyzed on a monthly basis and at the quarterly ABA Market Development Committee meetings. A key measure is the comparison between Australian almond shipments to target markets with the volume of exports by the Californian almond industry.

Market Development: Europe

The only Australian Almonds exhibition in Europe during AL17008 was Sial in Paris in October 2022. The two major Fine Food Trade Fairs in Europe are biennial, alternating between Anuga in Cologne and Sial in Paris. Although AL17008 commenced in July 2019, the Australian Almonds exhibition at Anuga in October 2019 was supported by an earlier Hort Innovation project: AL16010.

The Australian Almonds location in Sial 2022 was a 24.75 sqm booth within Hall 5C. It was relatively close to the Californian almond exhibitors in the adjacent Hall 4. Sial Paris 2022 ran from October 15 to 19.

The Australian almond growers, processors and exporters who participated in the Australian Almonds exhibition were Select Harvests, Almondco and Olam Food Ingredients. These three Australian almond marketers represent more than 70% of Australian almond production.

The major European trade exhibitions such as Sial Paris and Anuga have played an important role in elevating the Australian Almonds brand and its Australian almond growers within the European market. Strategically, Europe remains a core industry priority due to both the volume of the shipments to the region and the strong counter-party credentials of European customers. Given the price volatility of the global almond market, customer-reliability is very important. Sial Paris 2022 was an important trade event as the disruptions caused by the Covid pandemic eased. The Australian Almond exporters were able to meet with customers personally for the first time in three years as Covid restrictions caused the cancellation of Sial Paris 2020 and prevented travel to Anuga 2021.

Market Development: Middle East and India

Gulfood was the only major trade exhibition in which Australian Almonds participated throughout the course of AL17008. Australian almond growers and exporters personally participated in Gulfood 2020 and 2022. An external promotions agency managed a stand for the Australian almond industry at Gulfood 2021.

Gulfood is one of the world's largest annual Fine Food trade events. It is held annually in Dubai in February. This event attracts both a large Middle East customer base and a significant number of Indian almond traders.

Gulfood 2020

The core of our Gulfoods program is a nine metre by three metre trade booth with executives from Almondco Australia, Olam Orchards Australia, Nut Producers Australia and Select Harvests participating. Our booth was a key feature of the Australian pavilion in the Fine Foods area of the trade exhibition. It should also be noted that the Australian pavilion at Gulfoods was the first international exhibition that used the new nation brand.

Gulfood Industry Update and Customer Networking Event

Another feature of our Gulfoods Trade Mission was our Australian Almonds Networking Event held on the third evening of the exhibition. The CEO of the Almond Board of Australia, Ross Skinner, presented an Australian Industry Update of our 2020 crop to more than 70 customers and members of the global almond trade. While attendance was a little down on the previous year due to health concerns around travelling, the event provided a valuable opportunity for our Australian almond exporters to network with their key customers.


Australia-India Indoor Cricket Event

To enhance our customer relationships with our Indian customers, a game of Indoor Cricket was held on the eve of Gulfoods. While the activity was highly enjoyable, it is worth noting the unique ability of the Australian almond industry to collaborate and play as a team and the cultural connection around the game of cricket to attract our Indian customers to play as a team also.


The members of the Indian almond cricket team were very significant almond importers and customers. This is a very valuable networking event that is unique to the Australian almond industry.

Gulfood 2021

The Australian almond industry exhibited at the 2021 Gulfood trade faire which ran from February 21 to 25, held at the Dubai World Trade Center. This was the industry's first exhibition since the COVID-19 pandemic cancelled most of the events planned for 2020. The industry's presence featured a 6 metre by 3 metre booth. This year's Gulfoods Fair was the first 'in-person' food and beverage sourcing event of the year. Exhibitors from 85 countries met with buyers and attendees from 156 countries within a COVID-19 safe environment.

As the Covid travel restrictions prevented any of the Australian almond growers and exporters from attending Gulfood 2021, a Dubai-based Communications Agency, Ymakan, was engaged to manage the trade stand. The Australian Almonds exhibition had two key features: a video highlighting the major elements of our industry covering our orchards and processing facilities and a video encouraging the visitors to our booth to register and enjoy our Virtual Trade Exhibition.

This virtual trade exhibition is hosted on our Australian Almonds website: www.australianalmonds.com.au/expo. These platforms are undergoing continuous improvement and being enriched with new content. With international travel restrictions likely for most of this year, there is a need to optimise the effectiveness of our digital engagement strategies.

The photos highlight some of the changes made due to COVID-19. Clear screens have been utilized on each table to keep visitors and staff safe. Also, the Gulfoods organisers did not allow distribution of printed promotional material. As a result, QR codes for each of our promotional resources were available for customers to use to download the Guides and Factsheets. Another QR code was featured on the backwall to assist visitors to register for the virtual trade exhibition. More than 140 customers registered and visited the virtual trade exhibition.

Gulfood 2022

The 2022 Gulfood trade exhibition ran from February 13 to 18 and was held at the Dubai Trade Exhibition Center. Our Australian Almonds booth was a 6 metre by 3 metre display within the World Fine Foods Hall. Although one of the first major global trade events for the year, the customer visitation and interest in the Australian almond industry at this year's Gulfood Fair was very positive. Australian marketers from OFI, Select Harvests and Almondco met with a range of customers and traders over the course of the five days.

In addition to the exhibition, the Trade Mission included participating in the following networking events:

- Austrade Networking Event at the Australian Pavilion at the Dubai 2020 Expo
- Global Victoria – Taste of Victoria – Networking Event
- INC Networking Event

The Gulfood event also provided an opportunity to conduct meetings with a range of key trade and national leaders. These included the Australian Ambassador to the UAE, Ms Heidi Venamore, and the Consul General and General Manager of the Middle East & Africa Region, Mr Ian Halliday

One of the key insights from the 2022 Gulfood Trade Mission was an enhanced understanding of the potential in the Saudi Arabian market. The Austrade Commissioner to Saudi Arabia, Mr Ross Bray, provided an overview of the growth opportunities in the Saudi market. Currently, the Australian almond industry's direct exports to Saudi are small by comparison to other key markets in the region. The Saudi government are supporting the development of a Saudi Food Expo to attract direct trade from supply-origin rather than purchasing through traders in Dubai. This opportunity will be included in future Australian almond industry export development planning.

Market Development: China

The Covid pandemic and the travel restrictions to China meant that the Australian almond exporters were only able to personally attend one of the scheduled trade missions to China. This trade mission was focused on the China Nut Industry Conference in August 2019. The Australian almond industry participated in trade conferences and exhibitions in 2020 and 2021 via recorded videos and the engagement of a third-party representative who managed the Australian almond industry's exhibition.

China International Tree Nut Conference: 2019

The China Nut Industry Conference is managed by the China Chamber of Commerce for Import and Export of Foodstuffs, Native Produce and Animal By-Products. This trade event includes hosted seminars, an exhibition and matchmaking meetings. Industry leaders shared their knowledge and views on the global tree nut market, and more specifically on production and consumption of almonds, cashews, hazelnuts, macadamias, pecans, pistachios and walnuts.

The 2019event was attended by more than 500 participants from over 20 countries, including the United States, Iran, Australia, India, Chile, Mexico, South Africa, Guinea-Bissau, Japan, Canada, Ghana, Italy, Netherlands, Singapore, Turkey and Zimbabwe.

The purpose of the Australian almond industry's participation and exhibition at the 2019 China Tree Nut Conference was to leverage the opportunity of the significant tariff difference between Australian and Californian almonds and to build relationships with Chinese nut buyers that will extend beyond the China-USA tariff dispute. Within the presentation session devoted to almonds, Toby Smith from Olam Orchards Australia and Joseph Ebbage from the Almond Board of Australia delivered an update on the Australian almond industry.

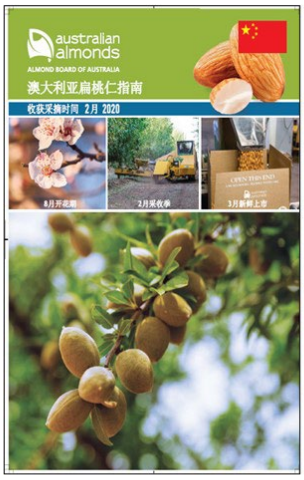
The Australian almond industry also had a booth in the exhibition hall to highlight our product quality and range as well as provide information resources about our Australian almond industry. The Australian almond exhibition stand at the 2019 China Tree Nut Conference was a three metre by three metre booth, located in the exhibition pavilion. The booth's creative featured an Australian almond orchard in blossom which reflected the blossom season currently under way in Australia at the time of the conference. This assisted in promoting the counter-seasonal nature of Australian almonds.

China International Tree Nut Conference 2020

The China Tree Nut Conference, originally scheduled for August 2020, was postponed to 9-11 September 2020. It was held in Qingdao, in the Shandong Province, China. Australian Almonds was promoted at this conference via an exhibition as planned within AL17008, albeit managed by the manager of Food South Australia's China Office as well as by video presentations during the Plenary Session devoted to almonds, from Toby Smith, Olam Orchards Australia, and Joseph Ebbage, Almond Board of Australia.

The Australian almond exhibition at the 2020 China Tree Nut Conference included a 3 metre by 3 metre booth and featured both almond kernels and value-added almond product. Visitors to the booth were provided with samples of almonds in custom printed 30-gram heart shaped snack tins.

Printed resources were developed in both Chinese and English for the delegates to take away**.**



The key Australian almond industry presentations were delivered by video. Toby Smith from Olam Orchards Australia presented an Australian almond industry update and Joseph Ebbage, from the Almond Board of Australia, presented on the almond market growth within China and future opportunities.

China International Tree Nut Conference 2021

Held in Hangzhou in September 2021: Sep 24-25, 2021.




Note, due to the very significant Covid restrictions in China during 2022, the China International Tree Nut Conference was cancelled.

Sial China 2021

The Covid restrictions led to the cancellation of the Sial China exhibition in 2020. However, the trade fair recommenced in 2021. Sial China 2021 was held in Shanghai from May 18 to 20. Food South Australia's China Office managed the Australian Almonds exhibition. This year's event covered more than 180,000 square metres, including snack foods, staple foods and condiments, beverages, meat, dairy products, seafood and aquatic products, fruits and vegetables, and food and beverage services. More than 4,500 exhibitors attended from 38 countries and regions, bringing with them a total of over 300,000 products.

The structure of the Australian Almonds exhibition was similar to the industry's presence at Gulfood 2021. QR codes were used for customers to register for the virtual trade exhibition and to download resources. The key resource, the Guide to Australian Almonds, was available in English and Mandarin versions. Approximately 300 customers visited the Food Australia-Australian Almonds exhibition.

Market Development: Southeast Asia

Food and Hotel Indonesia 2019

Food and Hotel Indonesia (FHI) is the premier food, beverage and hospitality event in Indonesia. It is run biennially at the JL Expo in Kemayoran Jakarta. The Australian almond industry exhibited at the 2019 FHI which ran from July 24 to 27. The Australian Almonds stand was a three metre by three metre booth in the international Fine Foods Hall. There was no dedicated Australian pavilion, nor was there a Victorian pavilion which had been a feature for several FHI events.

The key objectives of the Australian almond promotion were to continue to grow our understanding of the Indonesian nut market and to develop relationships with key nut importers and food manufacturers who use nuts and almonds in their product offerings. During the 2019 exhibition, the Australian almond industry engaged a Jakarta-based retail consultancy, Morelink Asia Pacific, to organise buyer meetings and assist with translation on the stand. The Australian almond booth at Food & Hotel Indonesia is shown below:

An important new feature of our Indonesian trade mission was a Seminar at the trade center on the first afternoon of FHI. This event was co-ordinated by the Austrade team in Jakarta. Approximately 30 trade visitors attended our Seminar.

Food and Hotel Indonesia 2022

Food & Hotel Indonesia 2022 was conducted at the Jakarta International Expo from July 25 to 28. While this edition of the exhibition was smaller than its pre-Covid editions, our Australian almond stand received more interest than our previous exhibitions.

The Australian Almond trade mission to Food & Hotel Indonesia included a Trade Seminar on Day Two which was well coordinated by the Jakarta Austrade team. More than 30 customers and potential customers attended our Seminar. The Australian Ambassador to Indonesia, Her Excellency Ms Penny Williams, visited our stand and spent some time asking about the future of the Australian almond industry and our growth plans for Indonesia.

As part of our trade mission, we had a tour of a major traditional market in Jakarta. The key insight was that the higher wealth families (upper middle class) had home help who performed the household shopping at the traditional markets. The nut and dried fruit stalls in these markets sell the vast majority of the category volume. One of our key industry tasks is to develop commercial relationships with the importers, re-packers and distributors who supply these traditional markets.

Trade Mission to Kuala Lumpur

Prior to the commencement of the 2022 Food & Hotel Indonesia exhibition, the Almond Board of Australia participated in a short trade mission to Kuala Lumpur which ran from 19-22 July. The Malaysian almond market presents a growth opportunity for Australian almond growers, processors and exporters.

Food and Hotel Asia 2022

Food and Hotel Asia was conducted at the Singapore Expo from September 5 to 8. We had a trade stand within the Australian pavilion which was the largest national pavilion in the whole exhibition. Our trade mission to Food & Hotel Asia included participating in networking events organised by Global Victoria, which featured our heart-shaped snack tins, and by Austrade, which included our Australian Almonds video within their agricultural compilation. Food & Hotel Asia is more a regional exhibition than FHI with customers and potential customers from Indonesia, Malaysia, Thailand, Vietnam, Philippines and Myanmar visiting our stand. A key insight from this exhibition relates to the education work required in this region where almond consumption is quite low. Conversely, this also point to the rising interest in almonds and the significant potential for growth.

Market Development: Japan

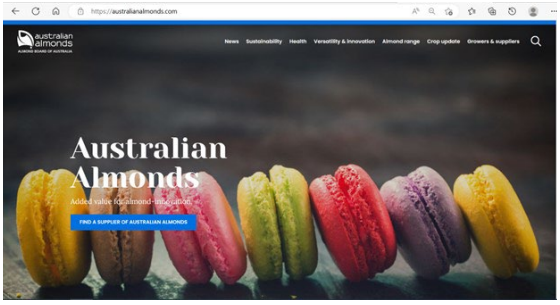
Japan Supermarket Trade Show 2020

Our February 2020 program commenced with a Seminar and Trade Exhibition at the Japan Supermarket Show. This trade fair ran from February 12 to 14 at the Makuhari Messe in Tokyo.

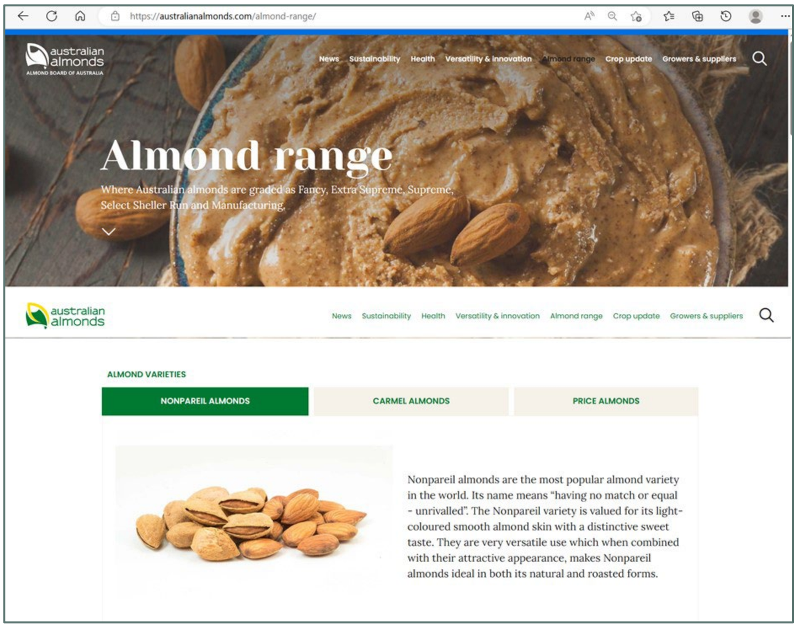
The feature of our Australian almond program during this exhibition was a Seminar held at the Exhibition Center on the first afternoon of the Trade Show. More than 50 Japanese almond industry trade representatives attended the Seminar. As in previous years, the Austrade Tokyo office and the Food South Australia Japan office assisted with the Seminar and trade exhibition. Damien Houlahan from Olam Orchards Australia, Tim Jackson from Almondco Australia and Joseph Ebbage from the Almond Board of Australia participated in the Seminar which included an Industry Update following by a Q & A session.

Trade Communication: an export focused industry website

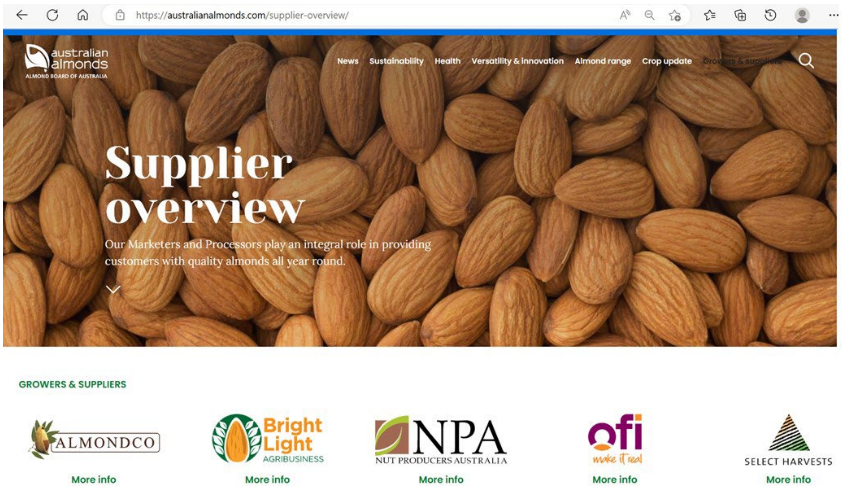
An important component of AL17008 was the development of an export focused trade website: www.australianalmonds.com. The role of this website is to provide information on key topics for the industry's trading partners including sustainability, health & nutrition, product innovation and versatility, product range, crop update and Australian almond suppliers.



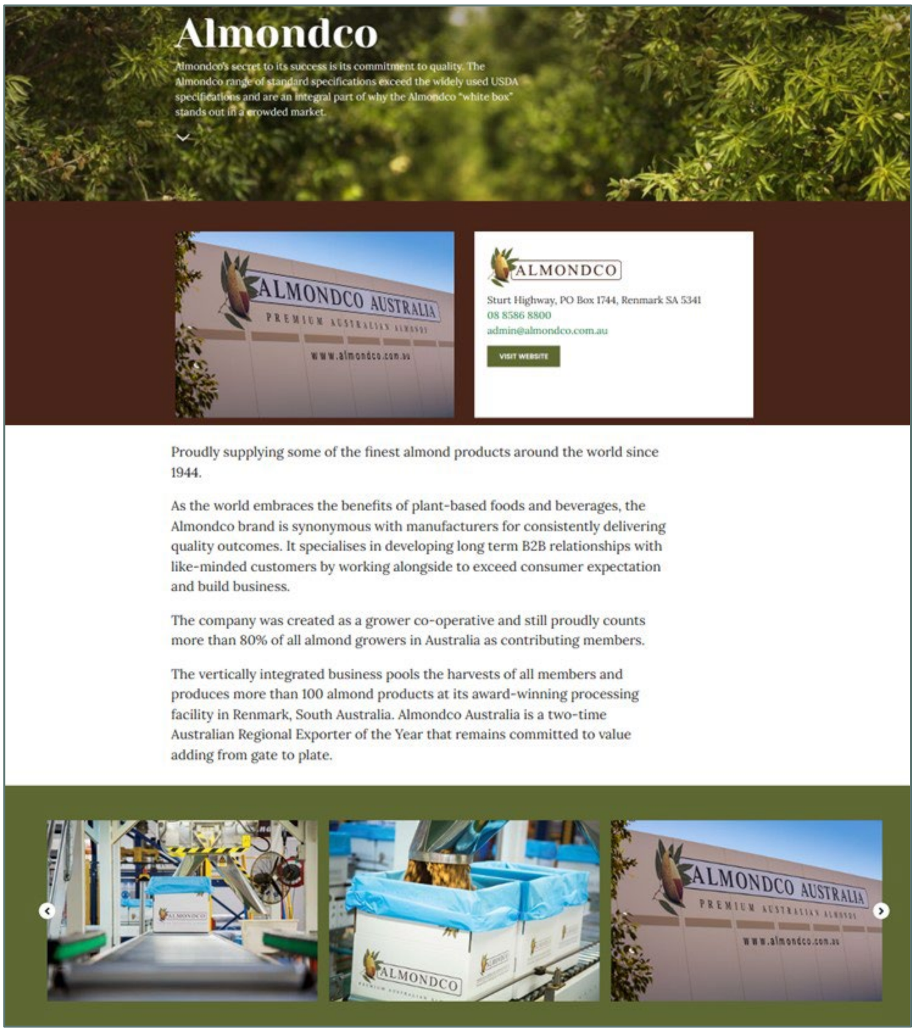
Two examples from the export website relate to the range of almond products grown and processed by the Australian almond industry. The ‘Almond range’ page details the key almond varieties grown in Australia as well as information of kernel sizing and the full value-added range of almond products available.



The export website also provides detailed information on each of the five Australian almond exporters and suppliers. It provides an industry overview as highlighted below.



The site also provides a separate page for each Australian almond exporter. An example of the Almondco page is below. Note a more detailed report on the export website will be included in the Final Report for AL19002 which is the second component of the Australian Almond industry’s export market access, maintenance and development program.

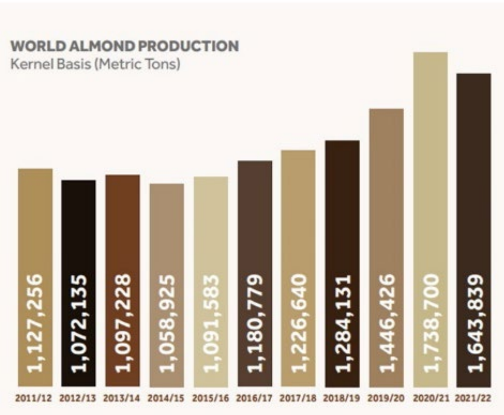


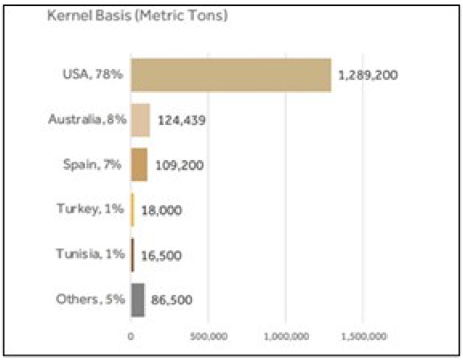
Results and discussion

Australian Almond exports as measured by the ABS indicate that the key objectives of AL17008 have been achieved. The total volume of Australian almonds exported in 2022-23 was 105,489 tonnes. This is an increase of 44,594 tonnes or a growth rate of 73% over the 2018-19 marketing year which was the year prior to the commencement of the AL17008 project.

Exports (Tonnes)	2018-19	2019-20	2020-21	2021-22	2022-23
Inshell	28,418	33,135	21,982	35,509	35,471
Kernel	32,476	43,421	54,710	51,075	70,018
Total	60,894	76,556	76,692	86,584	105,489

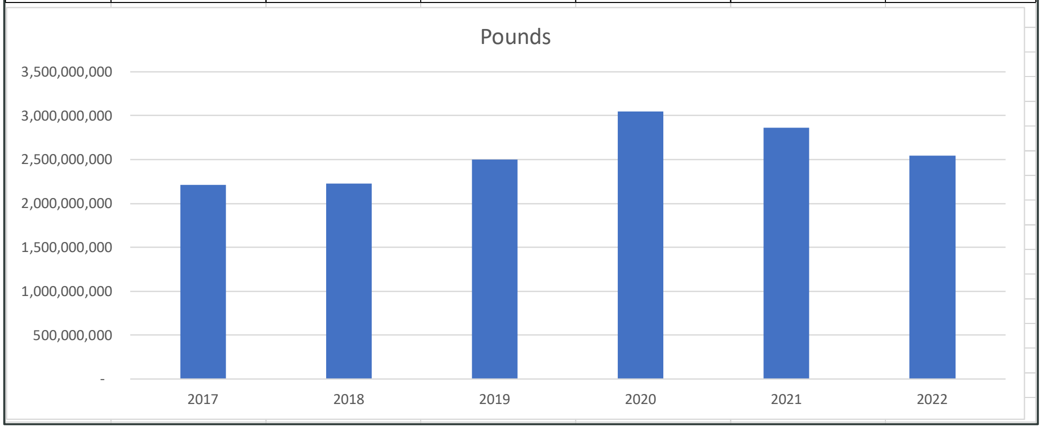
The table below outlines world almond production from 2011-12 to 2021-12. The major increase in 2020-21 was due to the significant growth in the Californian almond crop. The Australian almond industry remains the second largest growing region in the world followed by Spain.





The table and graph below highlight the growth of Californian almond production over the past six years noting that they are almost 80% of global almond supply.

Production	2017	2018	2019	2020	2021	2022
Pounds	2,215,266,687	2,224,179,360	2,500,190,903	3,044,812,896	2,863,561,374	2,548,000,000
Tonnes	1,004,838	1,008,881	1,134,079	1,381,118	1,298,903	1,155,765



In 2020, the global almond market was faced with a 22% increase in the Californian crop in one year. This volume growth equates to more than 250,000 tonnes of almonds.

Global Almond Pricing and Trading Conditions

Almond pricing deteriorated over the past three years due to the growing imbalance in supply and demand that was accentuated by a global shortage in sea freight. California grows 80% of the world's almonds and therefore dominates market pricing. Over the course of the past three years the Californians have produced their three largest almond crops. The all-time record 3.1-billion-pound crop in their 2020-21 marketing year proved to be a tipping point when combined with other headwinds being experienced across the world market. The most significant was a collapse in shipping availability.

Shipping delays, lack of shipping space and covid port shutdowns all conspired to reduce the ability of all almond growers to supply product. Sales opportunities were lost and despite aggressive marketing globally, the marketers could not sufficiently ramp up demand, resulting in record high inventory levels. This combined with the record 3.1-billion-pound crop further softened the market.

The table below provides the Australian almond industry's average export sales value per kilogram over the past five years. This data is made available through AL19005, the Almond

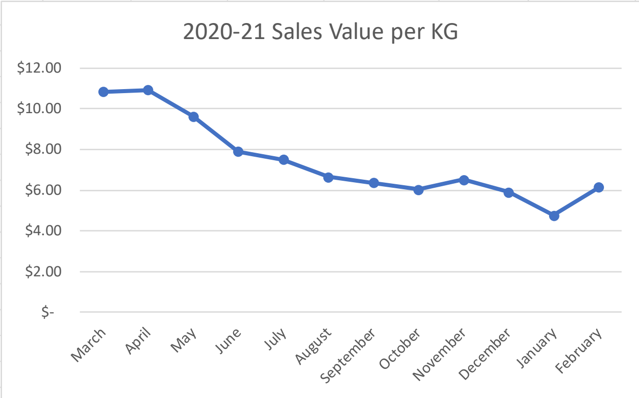
Industry Statistics and Data Collection Program

Aust Almond Export	2018	2019	2020	2021	2022
Inshell: $$ per kg	$ 9.68	$ 10.45	$ 7.21	$ 7.38	8.14
Kernel: $$ per kg	$ 8.54	$ 9.82	$ 7.07	$ 6.79	6.82
Total: $$ per kg	**$ 9.07**	**$ 10.09**	**$ 7.11**	**$ 7.03**	**7.27**

These sales statistics highlight the significant drop in global pricing experienced in 2020 which continued through most of the 2022-23 marketing year. It is important to note that these historically low values were ‘at or below’ the cost of production.

The graph below highlights the Australian almond export sales value per kilogram movements of the 2020-21 marketing year. (Note, the almond marketing period commences with Harvest in March and concludes the following February.)

March	April	May	June	July	August	September	October	November	December	January	February
$ 10.84	$ 10.92	$ 9.63	$ 7.89	$ 7.50	$ 6.64	$ 6.35	$ 6.04	$ 6.51	$ 5.90	$ 4.76	$ 6.15



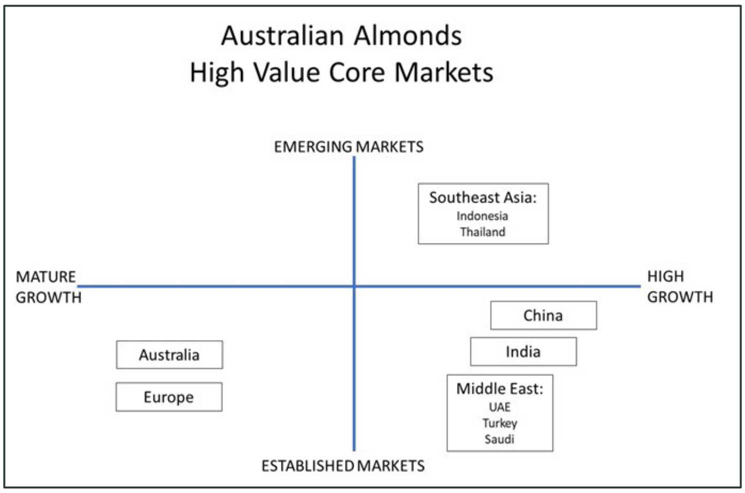
The Covid-induced trading disruptions commenced in March of 2020. However, the market’s understanding of the coming record Californian crop from June onwards resulted in significant pricing reductions.

Strategic Market Development Planning

A core objective of AL17008 is the continual development of the Australian almond industry’s collaborative approach to export market development. One way this commitment is manifested is through the industry’s collaborative strategic market development planning.

Over the period of AL17008, the industry’s understanding of its market development strategy has evolved. We commenced with a global distinction between Established and Emerging Markets from an Australian export volume perspective. This has evolved into a more sophisticated matrix where markets are distinguished by two axes: one axis measures Established and Emerging almond consumption and the other axis rates market growth potential for Australian almonds. This latter axis differentiates ‘mature growth’ markets and ‘high potential growth’ markets. The Australian almond industry exports to more than 50 country markets globally. The industry’s strategic market development plan looks to concentrate its resources in core, high value markets. The remaining markets are referred to as ‘exporter-specific’ markets.

The matrix below relates to the Australian almond industry’s core, high value markets.



The Established Markets of Australia, Europe, China, India and the Middle East share a broad consumer acceptance of almonds in their culture and cuisine. Australia has one of the world's highest almond consumption per capita rates of over one kilogram per person per year. The Indian market has consumed almonds since the time of the Silk Route. By comparison, the Emerging Markets of Southeast Asia present the opportunity to convert almond consumption from 'niche' to 'mainstream'.

However, from a growth perspective, Australia and Europe represent markets with a 'mature growth' outlook. As Australia's per-capita consumption is a global leader, it is envisaged that a target of 5% annual growth represents a stretch and is significantly above forecast population growth.

The potential growth for Australian almond exports to Europe is constrained by different factors: namely the promotional weight of the Californian almond industry and the production growth in Spain and Portugal. The 'food miles' advantage of Spain and Portugal in the European market is a significant sustainability issue.

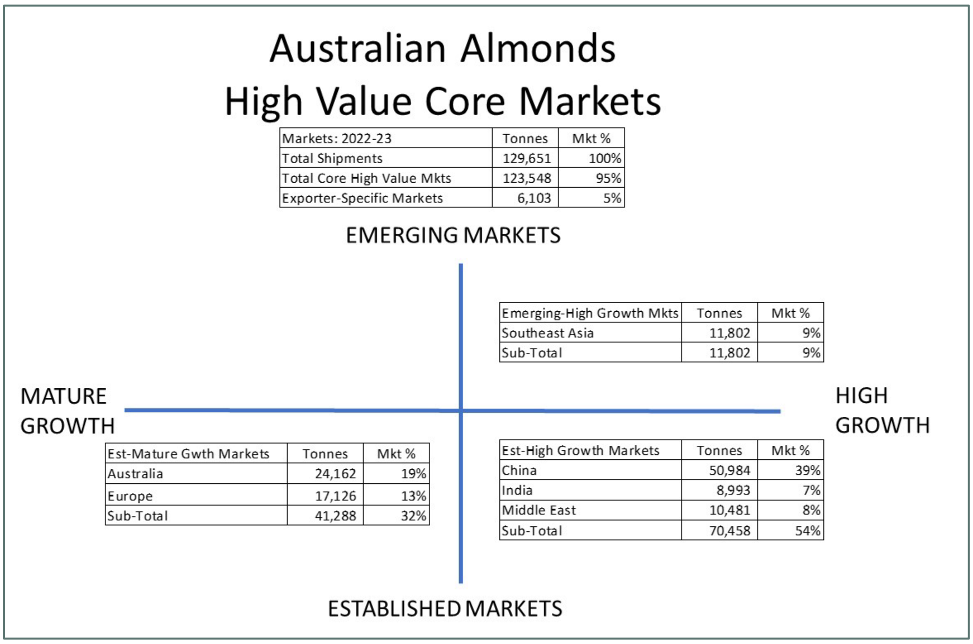
The Established almond consumption markets of China, India and the Middle East represent 'high growth' opportunities for the Australian almond industry. China and India have relatively low per-capita consumption rates. In relation to the Middle East region, the Australian almond industry's under-indexes in its share of global almond shipments and has the potential for significant growth.

The Emerging almond consumption market of Southeast Asia also represents a high potential growth opportunity for the Australian almond industry, albeit from a much lower shipment volume base.

The table below identifies the shipment volume of Australian almonds to each of these core, high value industry markets. They represent 95% of total Australian almond shipments for 2022-23: i.e. 123,548 tonnes. These markets were also the focus of the activities within AL17008. The success of AL17008 can be seen in the record export shipments in the 2022-23 year of 105,489 tonnes which was 81% of the industry's total shipments of 129,651 tonnes.

Markets: 2022-23	Tonnes	Mkt %
Total Shipments	129,651	100%
Domestic Mkt: Australia	24,162	19%
China	50,984	39%
India	8,993	7%
Europe	17,126	13%
Middle East	10,481	8%
South East Asia	11,802	9%
Total Core High Value Mkts	123,548	95%
Exporter-Specific Markets	6,103	5%

The Strategy-matrix can be reset to highlight shipment volumes. Importantly, the export markets that represent 63% of current shipments are in the 'high growth potential' category.



Evaluating the activities of AL17008 has been an essential component of the project. One of the key criteria centres on the sales value each major market delivers to Australia's almond growers, processors and exporters. The table below uses the ABS export statistics to identify export volume and value, differentiated between Australian almonds sold 'inshell' and 'kernel'. Note, the volume statistics are in 'Kernel Weight Equivalent' (KWE) values.

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
Total Exports	35,471	$ 288,648,345	70,018	$ 477,730,142	105,489	766,378,487	$ 8.14	$ 6.82	$ 7.27
China	26,391	$ 219,986,314	24,593	$ 200,880,322	50,984	$ 420,866,636	$ 8.34	$ 8.17	$ 8.25
India	8,841	$ 66,517,642	152	$ 1,036,205	8,993	$ 67,553,847	$ 7.52	$ 6.82	$ 7.51
Sub-Total	35,232	$ 286,503,956	24,745	$ 201,916,527	59,977	$ 488,420,483	$ 8.13	$ 8.16	$ 8.14
Europe	16	$ 131,612	17,110	$ 102,934,121	17,126	$ 103,065,733		$ 6.02	$ 6.02
Middle East	195	$ 1,625,770	10,286	$ 74,051,708	10,481	$ 75,677,478		$ 7.20	$ 7.22
Southeast Asia	15	$ 108,646	11,787	$ 64,225,704	11,802	$ 64,334,350		$ 5.45	$ 5.45

The total export value achieved in 2022-23 exceeded $766 million for a total volume shipped of 105,489 tonnes. This represents an industry average sales value per kilogram (kg) of $7.27. Australian almonds sold Inshell attracted a higher average shipment value per kg than almonds sold as kernels: namely $8.14/kg for inshell compared to $6.82/kg for kernels. One of the reasons for this differential is that the lower-priced, manufacturing grades of almonds are marketed as kernel. Nevertheless, Inshell almonds are premium value. There are only two major inshell markets in the world: China and India. The tariff advantage of Australian almonds over Californian product into China has driven the value-premium of Australian almonds sold both as inshell and kernel. The average sales value per kg of inshell almonds to China was $8.34 compared to inshell to India of $7.52.

Almond kernel value per kg was also led by China with $8.17. To understand the other markets, there is a need to take particular country-markets into account.

Europe is a core export region for the Australian almond industry. AL17008 provided major trade exhibitions annually to support this trade. The table below highlights both the volume and value of the key country-markets within the region.

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
Europe	16	$ 131,612	17,110	$ 102,934,121	17,126	$ 103,065,733		$ 6.02	$ 6.02
Spain			8,693	$ 41,248,091	8,693	$ 41,248,091		$ 4.74	$ 4.74
Germany			3,527	$ 29,095,886	3,527	$ 29,095,886		$ 8.25	$ 8.25
Netherlands			1,562	$ 10,769,640	1,562	$ 10,769,640		$ 6.89	$ 6.89
Denmark			948	$ 5,283,029	948	$ 5,283,029		$ 5.57	$ 5.57
France			787	$ 5,766,416	787	$ 5,766,416		$ 7.33	$ 7.33
Poland			297	$ 2,125,317	297	$ 2,125,317		$ 7.16	$ 7.16
UK			205	$ 1,302,799	205	$ 1,302,799		$ 6.36	$ 6.36

While the average sales value per kg across the region was $6.02, the largest country-market was Spain. 8,693 tonnes of Australian almonds were shipped to Spain in 2022-23. However, this is lower-grade, manufacturing product sold principally to Spanish almond processors who convert the kernels into a range of blanched almond products that are re-exported. The average sales value per kg of product sold to Spain was $4.74. When Spanish exports are extracted from total European shipments, the average value per kg of the region lifts to $7.33.

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
Europe	16	$ 131,612	17,110	$ 102,934,121	17,126	$ 103,065,733		$ 6.02	$ 6.02
Spain			8,693	$ 41,248,091	8,693	$ 41,248,091		$ 4.74	$ 4.74
Europe Less Spain			8,417	61,686,030	8,433	61,817,642		$ 7.33	$ 7.33

The focus of AL17008 and of the Australian industry's collaborative market development program is on the higher quality grades given their premium return to Australian almond growers, processors, and exporters.

The Middle East region returns an above-global average sales value per kg of $7.22. This region looks to buy larger-sized, high quality almond kernels. It is viewed as a high-growth potential market for the Australian almond industry.

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
Middle East	195	1,625,770	10,286	74,051,708	10,481	$ 75,677,478	$ 8.35	$ 7.20	$ 7.22
Turkiye	188	$ 1,538,178	5,864	$ 39,440,001	6,052	$ 40,978,179	$ 8.17	$ 6.73	$ 6.77
UAE	6	$ 82,041	3477	$ 27,246,486	3,483	$ 27,328,527		$ 7.84	$ 7.85
Qatar			346	$ 2,706,062	346	$ 2,706,062		$ 7.82	$ 7.82
Saudi			197	$ 1,583,441	197	$ 1,583,441		$ 8.04	$ 8.04

AL17008 provided for a major annual exhibition at the Gulfood Fine Food Fair in Dubai. This exhibition attracts buyers from the key markets highlighted above. The Türkiye market grew significantly over the course of the project. It is a significant manufacturing base in the region which explains the lower sales value per kg of $6.77. It should be noted that this return is significantly higher than the manufacturing grade sales to Spain. Saudi and Qatar are also high growth potential markets for Australia within this region. Their buying interest in larger sized Nonpareil points to their premium sales value of $8.04/kg and $7.82/kg respectively.

The sales value per kg of product exported to Southeast Asia needs context. Olam Food Ingredients (OFI) are the largest Australian almond grower, processor and exporter. Their processing plant for their value-added almond range such as blanched almonds, slivered and flaked almonds and almond meal, is in Vietnam. As such, the product exported to Vietnam is largely Olam product being transferred to further processing.

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
Southeast Asia	15	$ 108,646	11,787	$ 64,225,704	11,802	$ 64,334,350	$ 7.05	$ 5.45	$ 5.45
Thailand			2,073	17,261,356.00	2,073	$ 17,261,356		$ 8.33	$ 8.33
Indonesia			864	$ 5,536,767	864	$ 5,536,767		$ 6.41	$ 6.41
SE Asia without Vietnam			3,392	26,870,076	3,392	26,870,076		$ 7.49	$ 7.49
Vietnam	15	108646	8,395	$ 37,355,628	8,410	$ 37,464,274		$ 4.45	$ 4.45

When the Vietnam exports are removed from the total Southeast Asian shipments, the average sales value per kg for the region is $7.49.

Export shipments to the USA also require explanation. Almonds that cannot be processed in Australia due to quality issues are shipped to specific processors in California who have advanced sorting technology or who can convert into almond oil. The sales value of almonds shipped to the USA for further processing is only $3.03/kg.

The sales value of Australian almonds exported to High Value Core Markets can also be included in the matrix: see below. This matrix assists in clarifying the premium value markets that is the focus of the collaborative industry market development program.

Australian Almonds
High Value Core Markets

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
Total High Value Mkts	35,458	$ 288,369,984	63,928	$ 443,128,060	99,386	$ 731,498,044	$ 8.13	$ 6.93	$ 7.36

EMERGING MARKETS

2022-23	Total Ton	Total $$	Kernel $/kg
SE Asia without Vietnam	3,392	26,870,076	$ 7.49

MATURE GROWTH

HIGH GROWTH

2022-23	Total Ton	Total $$	Kernel $/kg
Australia	24,162	Not Reported	
Europe Less Spain	8,433	61,817,642	$ 7.33

2022-23	Total Ton	Total $$	Inshell $/kg	Kernel $/kg	Total $/kg
China	50,984	$ 420,866,636	$ 8.34	$ 8.17	$ 8.25
India	8,993	$ 67,553,847	$ 7.52	$ 6.82	$ 7.51
Middle East	10,481	$ 75,677,478		$ 7.20	$ 7.22

ESTABLISHED MARKETS

A final approach to understanding the strategic direction of export market development for Australia's almond growers, processors and exporters is compare the contribution of almonds sold inshell and as kernel.

The table below breaks down the Australian inshell market: 34% of total export volume was sold inshell but returned 38% of the sales value. The sales value per kg of inshell sold to both China and India was above the global average. China and India are critical markets for the sales return to Australian almond growers, processors, and exporters. Developing both these markets was a major objective of AL17008.

2022-23	Inshell Ton	Inshell $$	Kernel Ton	Kernel $$	Total Ton	Total $$	Inshell $/kg
Total Exports	35,471	$ 288,648,345	70,018	$ 477,730,142	105,489	766,378,487	$ 8.14
Share of Exports	34%	38%	66%	62%	100%	100%	
China	26,391	$ 219,986,314					$ 8.34
India	8,841	$ 66,517,642					$ 7.52
China & India Inshell	35,232	$ 286,503,956					$ 8.13

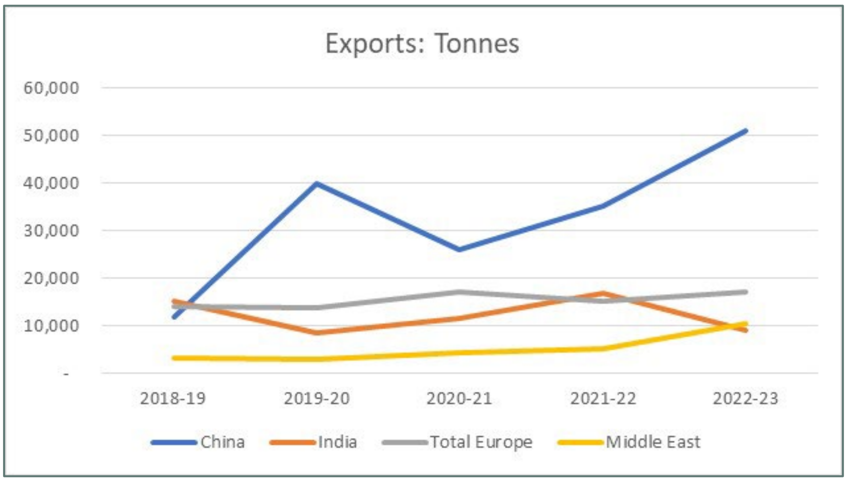
It is important to note that the quantity of Australian almonds capable to being processed and sold as inshell is limited. Kernel sales will always represent the majority of the export volume. As the Australian almond industry's production continues to grow, the tonnes of manufacturing grade product requiring export destinations will also grow. However, as the sales value analysis above indicates, developing export markets for the premium quality kernels is critical for Australian almond growers, processors, and exporters.
The table below removes the 'Hi/Lo' kernel markets to identify the average remaining sales value per kg of almonds exported as kernels. The 'Hi' market was China and the 'Lo' markets are Spain, Vietnam and USA.

2022-23	Kernel Ton	Kernel $$	Kernel $/kg
Total Exports	70,018	$ 477,730,142	$ 6.82
China	24,593	$ 200,880,322	$ 8.17
Spain	8,693	$ 41,248,091	$ 4.74
Vietnam	8,395	$ 37,355,628	$ 4.45
USA	2,914	$ 8,837,217	$ 3.03
Sub-Total of Hi/Lo	44,595	$ 288,321,258	
Kernel (non Hi/Lo)	25,423	$ 189,408,884	$ 7.45

More than 25,000 tonnes of kernel were exported outside of the 'Hi/Lo' markets returning sales value of almost $190 million. The average sales value per kg for these almonds was $7.45. This value serves as a useful benchmark when assessing individual export country-markets.

The principal activities of AL17008 were trade missions and exhibitions supported by the development of an export-oriented website for on-going trade communication. The discussion above examined in detail the result of the four years of work within AL17008 in terms of volume and value. The next set of tables and graphs look at the sales volumes for key markets within AL17008 that were achieved over the course of the project.

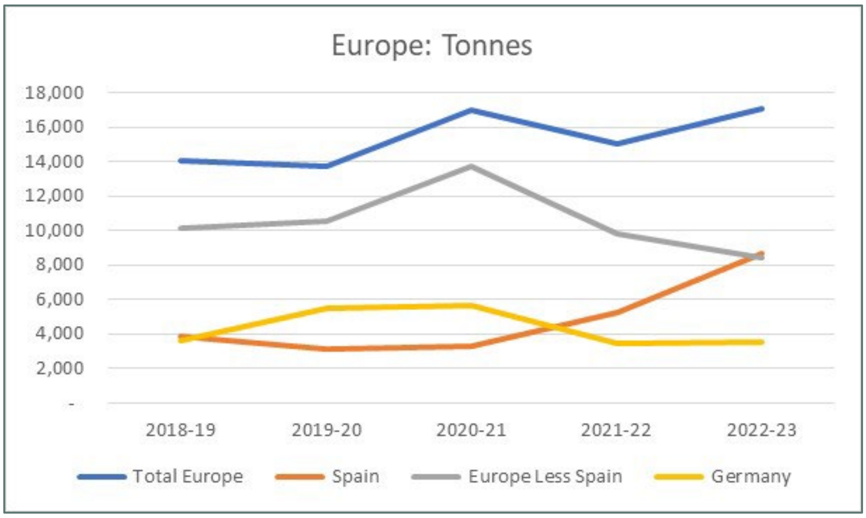
Exports: Tonnes	**2018-19**	**2019-20**	**2020-21**	**2021-22**	**2022-23**
China	11,860	39,862	26,019	35,270	50,984
India	15,155	8,599	11,655	16,711	8,993
Total Europe	14,052	13,771	17,018	15,091	17,126
Middle East	3,249	3,034	4,352	5,253	10,481



The table and graph above highlight the growth of the Chinese export market for Australian almond growers, processors, and exporters over the course of AL17008. This growth, driven by the tariff advantage of Australian almonds over Californian product, built on the foundation of trade development by the Australian almond industry over the previous decade. Sales of inshell almonds to India dropped over the last year of AL17008 due to the value differential of the Chinese market and weather-related quality issues of the 2022 inshell crop. The latter issue was due to some rain during the 2022 harvest that caused some staining on the shell of the almonds. The graph also highlights the growth in exports to the Middle East region, which was an important objective of AL17008. This region buys higher quality almond kernel contributing an average sales value per kg of $7.22.

Developing trade relationships in Europe was a core component of AL17008. The table and graph below highlight the growth of this market over the life of the project and differentiate the product sold to Spain and to Germany.

Europe: Tonnes	2018-19	2019-20	2020-21	2021-22	2022-23
Total Europe	14,052	13,771	17,018	15,091	17,126
Spain	3,907	3,179	3,270	5,296	8,693
Europe Less Spain	10,145	10,592	13,748	9,795	8,433
Germany	3,627	5,531	5,675	3,483	3,527



Europe remains a critical market for Australian almond growers, processors, and exporters. It was a key market within AL17008. Australian almonds shipped to Europe grew over the course of AL17008, driven in the last year of the project by sales to Spain. Exports to Germany are important as they deliver premium value per kg. During the 2022-23 marketing year, the average sales value of product exported to Germany was $8.25/kg compared to $6.02/kg for Total Europe and $4.74/kg for sales to Spain. The insight from the sales value achieved in Germany is the importance of premium quality kernels for snacking. For example, two of Europe's largest nut snack manufacturers are based in Germany: namely Intersnack and Seeberger.

Developing the export trade to Southeast Asia was also an important component of AL17008. The table below highlights the growth in export volume to the region. The discussion above relating to sales value per kg contextualized the exports to Vietnam.

Exports: Tonnes	2018-19	2019-20	2020-21	2021-22	2022-23
Southeast Asia	10,732	4,895	8,374	10,123	11,802
Vietnam	8,938	2,789	6,617	6,529	8,410
Thailand	1,131	1,255	1,142	1,908	2,073
Indonesia	281	337	269	1,141	864

Over the course of AL17008, export volumes to Thailand and Indonesia have grown significantly. The Australian almond industry has competitive advantages in both markets in tariffs due to FTA's and in freight and logistics.

Outputs

The table below outlines the trade missions and exhibitions executed within AL17008 and the export-focused website.

Table 1. Output summary

Output	Description	Detail
Sial Paris 2022	Trade exhibition at the Sial Paris trade exhibition.	Australian Almond exhibition and trade mission at Sial Paris which ran from 15-19 October 2022; attended by Almondco Australia, Select Harvests, Olam Food Ingredients and the Almond Board of Australia
Gulfood Trade Exhibition 2020	Trade exhibition at Gulfood 2020	Australian almond exhibition and trade mission at Gulfood 2020 which ran from 16-20 February 2020; attended by Almondco Australia, NPA, Select Harvests, Olam Food Ingredients and the Almond Board of Australia
Gulfood Trade Exhibition 2021	Trade exhibition at Gulfood 2021	Australian almond exhibition at Gulfood 2021 which ran from 21-25 February 2021. Managed by Ymakan Communications Agency in Dubai due to Covid travel restrictions.
Gulfood Trade Exhibition 2022	Trade exhibition at Gulfood 2022	Australian almond exhibition and trade mission at Gulfood 2022 which ran from 13-18 February 2022; attended by Almondco Australia, Select Harvests, Olam Food Ingredients and the Almond Board of Australia
China Tree Nut Conference 2019	Trade exhibition and conference presentation at China Tree Nut Conference 2019	Trade exhibition booth and Industry Presentation during the Conference Plenary Session focused on almonds. The Conference ran from 5-7 August 2019; attended by Almondco Australia, NPA, Select Harvests, Olam Food Ingredients and the Almond Board of Australia
China Tree Nut Conference 2020	Trade exhibition and conference presentation at China Tree Nut Conference 2020	Video presentation played during the Plenary session focused on almonds: China-only conference during Covid. Australian Almond exhibition managed by the China Office of Food South Australia.
China Tree Nut Conference 2021	Conference presentation at China Tree Nut Conference 2021	Video presentation played during the Plenary session focused on almonds: China-only conference during Covid.
Sial China Exhibition 2021	Trade exhibition at Sial China exhibition 2021	Trade exhibition booth managed by the China Office of Food South Australia due to Covid travel restrictions. The exhibition ran from 18-20 May 2021.
Food & Hotel Indonesia 2019	Trade exhibition and Seminar at Food & Hotel Indonesia 2019	Trade exhibition and seminar at Food & Hotel Indonesia 2019 which ran from 24-27 July 2019; attended by Almondco Australia, Select Harvests, Olam Food Ingredients and the Almond Board of Australia
Food & Hotel Indonesia 2022	Trade exhibition and Seminar at Food & Hotel Indonesia 2022	Trade exhibition and seminar at Food & Hotel Indonesia 2022 which ran from 25-28 July 2022; attended by Select Harvests, Olam Food Ingredients and the Almond Board of Australia.
Trade Mission to Kuala Lumpur Malaysia	Trade mission in Kuala Lumpur	First trade mission to Malaysia by the Australian almond industry. This mission ran from 19-22 July 2022. It was attended by the Almond Board of Australia and consisted of meetings with Austrade, the Victorian Government

		Trade office, selected potential almond customers and potential marketing agency partners.
Food and Hotel Asia 2022	Trade exhibition at Food & Hotel Asia 2022	Trade exhibition at Food & Hotel Asia in Singapore which ran from 5-8 September 2022. It was attended by Select Harvests, Olam Food Ingredients and the Almond Board of Australia
Japan Supermarket Show 2020	Trade exhibition and seminar at the Japan Supermarket Show 2020	Trade exhibition and seminar at the Japan Supermarket Show which ran from 12-14 February 2020. It was attended by Almondco Australia, Olam Food Ingredients and the Almond Board of Australia
Export-focused website	Developed and launched an export focused website: www.australianalmonds.com	Trade communication online resource providing information on key topics including sustainability, health & nutrition, innovation & versatility, product range, industry crop updates and supplier information.

Outcomes

Table 1. Outcome summary

Outcome	**Alignment to fund outcome, strategy and KPI**	**Description**	**Evidence**
Grow export sales in new, emerging and existing markets around the world.	This outcome aligns perfectly with Outcome 2 of the Hort Innovation Strategic Investment Plan in creating demand in new, emerging and existing export markets.	A range of events were staged in various markets and underpinned the growth in sales across the globe.	Export sales have grown from 58,964 tonnes in 2016 to more than 105,000 in 2022-23
The collaborative culture of the Australian almond industry exporters in relation to growing export markets strengthened	As above, this outcome aligns with Outcome 2 of the Hort Innovation Strategic Investment Plan	The collaborative approach to export trade missions and exhibitions by Australia's almond growers, processors and exporters is unique in Australian horticulture. It allows the activities to optimize the market development opportunity for Australian Almonds as a trusted brand while providing each Australian exporter the opportunity for individual customer acquisition and growth	The exhibition stands developed and utilized in AL17008 are solely focused on the Australian Almonds brand. All five Australian almond exporters that reflect more than 95% of total Australian almond production, work together under the single banner of the Australian Almonds brand.
The brand reputation of Australian almonds for safe, high-quality almond strengthened.	As above, this outcome aligns with Outcome 2 of the Hort Innovation Strategic Investment Plan	Australian almonds have a reputation for premium quality within the constraints of agricultural issues. For example, rain during the harvest season can result in unavoidable	The growth in export sales of Australian almonds from 64,894 tonnes in 2018-19 to 105,490 tonnes in 2022-23 indicate the acceptance of the global almond market that Australian

		staining on the shells of the almonds impacting its perception by inshell traders. The trade exhibitions and missions within AL17008 communicate the significant technological advances by Australian almond growers, processors, and exporters in continually improving product quality.	almonds are safe and high-quality.

Monitoring and evaluation

< Discuss overall project performance, answering the Key Evaluation Questions (KEQs) that were identified within the project's M&E Plan (if relevant). Areas for continuous improvement should be identified and discussed where relevant. For more information, refer to *Attachment A3: Final report guide* >

Table X. Key Evaluation Questions

Key Evaluation Question	Project performance	Continuous improvement opportunities
Trade Exhibitions		
Has the program met the end-of-project outcomes of increased export sales, a strengthened collaborative industry approach to export development and a strengthened Australian Almonds brand reputation?	The Australian almond industry's export sales were 105,490 tonnes for the 2022-23 marketing year. This is an increase of 16,320 tonnes or 19.4% over the previous year. This result meets the end-of-project outcome. The recommencement of physical trade missions and trade exhibitions in 2022 demonstrated the collaborative industry approach to export market development. The demand for Australian almonds across more than 50 countries highlight the strength of the Australian Almonds brand reputation.	Identify trade exhibitions to enhance with seminars and networking events Strengthen Australian Almonds brand reputation in selected markets through education of potential trade customers. EG: In Southeast Asia, where the almond trade is 'emerging', potential customers may not have purchased almonds from any market (California) and require education as to the process.
How can the program activities and resources be made more relevant to targeted trade customers	The industry's key Established Markets purchase the majority of Australian almonds exported. The activities and resources developed for these Established Markets are appropriate and effective.	The opportunity to improve program activities and resources lie in the high growth potential 'Emerging Markets' such as Southeast Asia and high growth country markets within Established Market regions such as China, India and the Middle East. The next stage of resource development for these high growth potential markets includes: (1) more comprehensive and richer educational tools around the export-import process for traders new to the almond industry in Southeast Asia; and (2) greater information around the five major Australian almond marketers for high growth potential country markets in Established Market regions such as China, India, and the Middle East.
Have the program activities been suitable for meeting the end-of-project goals	The collaborative approach of the Australian almond growers, processors and exports to exhibit under the single banner of 'Australian Almonds' is unique in	Insights from the trade missions and exhibitions from this project (AL17008) and the other aligned Hort Innovation supported project relating to the Almond industry's

	Australian horticulture. It represents the strength of the Australian almond industry in developing and executing cost efficient and effective market development activities. The placement of the trade exhibitions and trade missions is driven by the ongoing review and direction from the Australian almond growers, processors and exporters in consultation with the Hort Innovation Trade team.	market development (AL19002), identify opportunities to differentiate the industry's trade exhibitions and missions to Southeast Asia. These activities could provide more detailed trade education to potential customers not currently involved in buying almonds but who have the credibility to do so. The Fine Food exhibitions in Southeast Asia also have the opportunity to engage the food hospitality sector who are key leaders in developing new demand for Australian almonds in a broad portfolio of meals and snacks.
Is the project on-track to meet its end of project outcomes and deadlines	The project made a critical contribution to the growth in Australian almond exports that meet the end of project outcomes. Australian almond exports grew from 60,894 tonnes in the 2018-19 marketing year to 105,490 tonnes in 2022-23.	Timing and delivery of trade exhibitions and missions were significantly impacted by the Covid global pandemic in 2020 and 2021. New activity schedules needed to be developed and implemented.
Export-focused website		
Has the program met the end-of-project outcomes of increased export sales, a strengthened collaborative industry approach to export development and a strengthened Australian Almonds brand reputation?	An export-focused website was developed and launched to support the ongoing trade communication requirements of Australia's almond growers, processors, and exporters. It is located on www.australianalmonds.com. The website contains information on key trade topics including Sustainability, Nutrition, Food Innovation, the Australian almond range, Crop updates and an overview of Australian almond suppliers. The detailed information on each of the five Australian almond exporters reflect the collaborative approach of the Australian almond growers, processors, and exporters.	Insights from this project, AL17008 and an aligned market development project, AL19002, identify opportunities to create a pan-regional site customized to Southeast Asia. This site would provide richer educational resources targeted to potential customers who are not currently trading in almonds but who are credible prospective customers. Given the improvement in the geopolitical relationship with China, it will be prudent to develop a website specific for this market.
How can the program activities and resources be made more relevant to targeted trade customers	The key topics on our global export website, www.australianalmonds.com, address the principal issues raised at the Trade Exhibitions and Trade Missions.	The opportunity most clearly evident from the learnings of AL17008 is to develop a pan-regional site for Southeast Asian traders. It needs to provide more detailed educational resources for both current and potential almond traders. As almonds as a food are not part of the traditional culinary culture of Southeast Asia, there is a need to

		educate and engage new importers, distributors, food manufacturers and retailers to the sales and profit opportunities of trading in Australian almonds.
Have the program activities been suitable for meeting the end-of-project goals	The export website, www.australianalmonds.com, presents both key information and a sense of the collaborative approach to export market development that is unique to the Australian almond industry within Australian horticulture. This is evident in the detailed section on Australian almond suppliers with an overview page plus a detailed page on each exporter.	Key insights for further development include enriching each major topic area. For example, the Sustainability section could include a virtual reality experience of an Australian almond orchard outlining important aspects of sustainable almond growing; the specific pages on each Almond Supplier and exporter could feature videos from each of the major Australian almond grower, processor and exporter groups.
Is the project on-track to meet its end of project outcomes and deadlines	The global export focused website, www.australianalmonds.com, was developed and launched within the project.	Timings for the whole project were significantly impacted by the Covid global pandemic. New activity schedules and a project timing variation was required.

Recommendations

- To recommit to a collaborative approach to strategic market development planning by Australia's almond growers, processors, and exporters that delivers cost efficient and effective activities.
- To develop a single holistic global market development program that includes all the strategically important industry markets including the Australian domestic market.
- To evolve the marketing approach to Southeast Asia understanding its importance in developing an export trade diversification strategy.
- To customize the trade missions, exhibitions and communication resources for each strategic market for the Australian almond industry focusing on product quality, Free Trade Agreement advantages, and freight and logistic advantages.
- To leverage with analytical research within AL17008 in relation to market sales value to target premium value in each strategically important market: for example, inshell almonds to India and premium almond kernel to the European snack industry.

Refereed scientific publications

Not applicable

Intellectual property

No project IP or commercialisation to report