

Guide to Australian Almonds



australian
almonds

ALMOND BOARD OF AUSTRALIA

www.australianalmonds.com.au/trade

Blossom in August - Harvest in February - Fresh in March

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER



Harvest



Available fresh

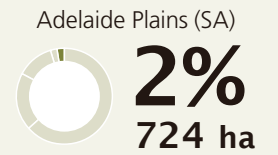
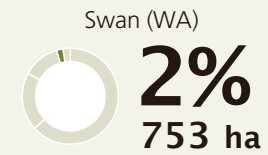
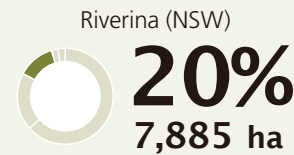
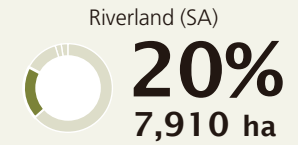
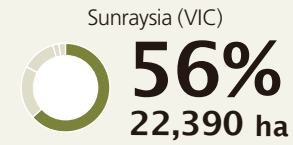
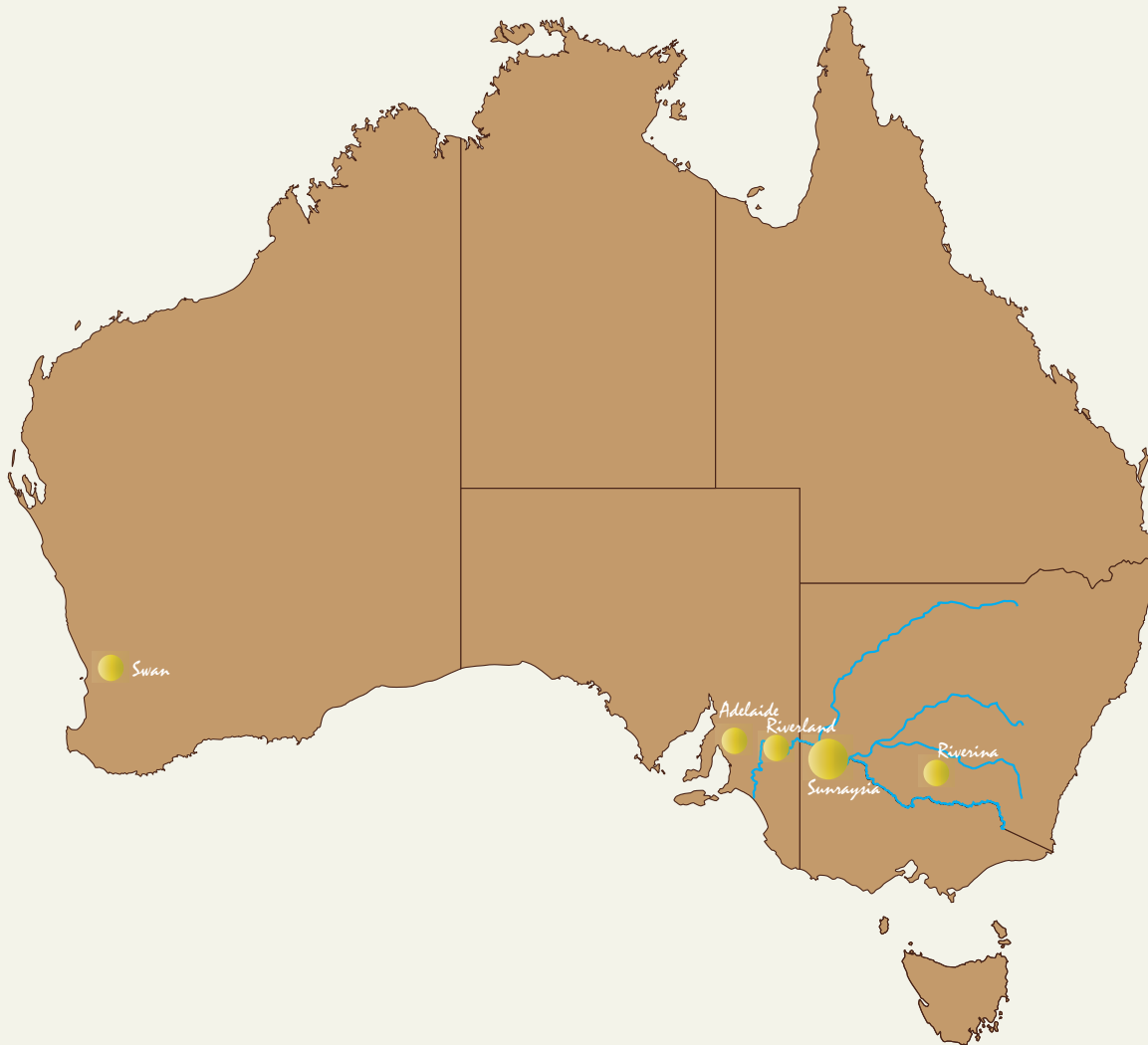


Blossom

Growing regions

Where do we grow our Australian almonds?

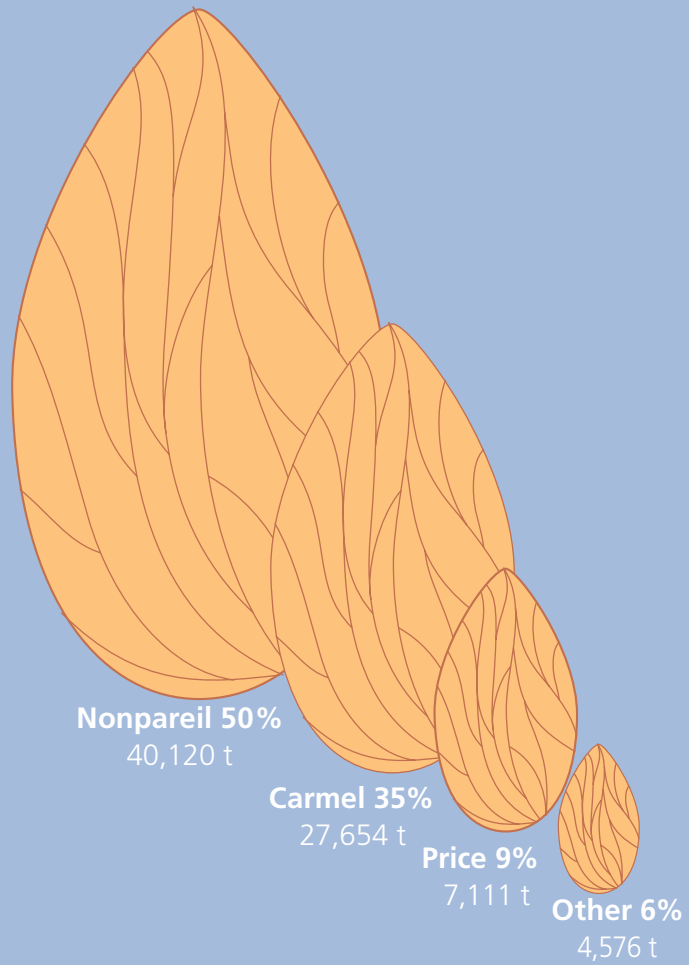
Total area planted to almonds has grown from 5,230 hectares in 2001 to 39,662 hectares in 2017.



Production

Australian almonds are a Southern-hemisphere crop – harvesting in February

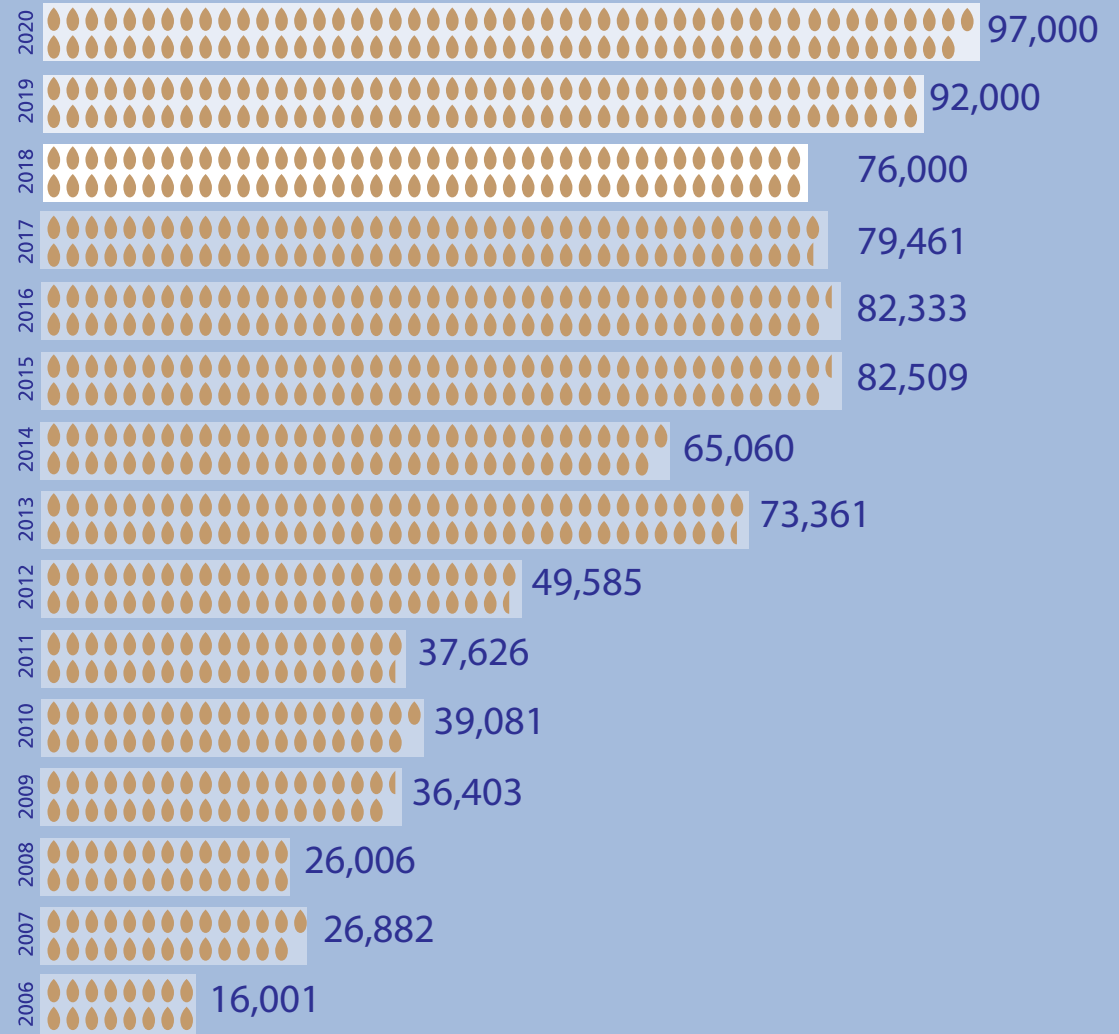
By Variety



2017 Total 79,461 t

By volume

Australian industry production – past & present (kernel tonnes)



= 1,000 t

Our almonds



Australian Nonpareil

Australian Nonpareil almonds have the 'classic' flavour and shape loved all over the world.



Australian Carmel

Australian Carmel almonds are known for their intense almond flavour.



Australian Price

Australian Price almonds taste sweet & buttery, great as a snack and as an ingredient.

Kernel Size

Varies across varieties and dictates the number of almonds per ounce.



18-20



20-22



23-25



25-27



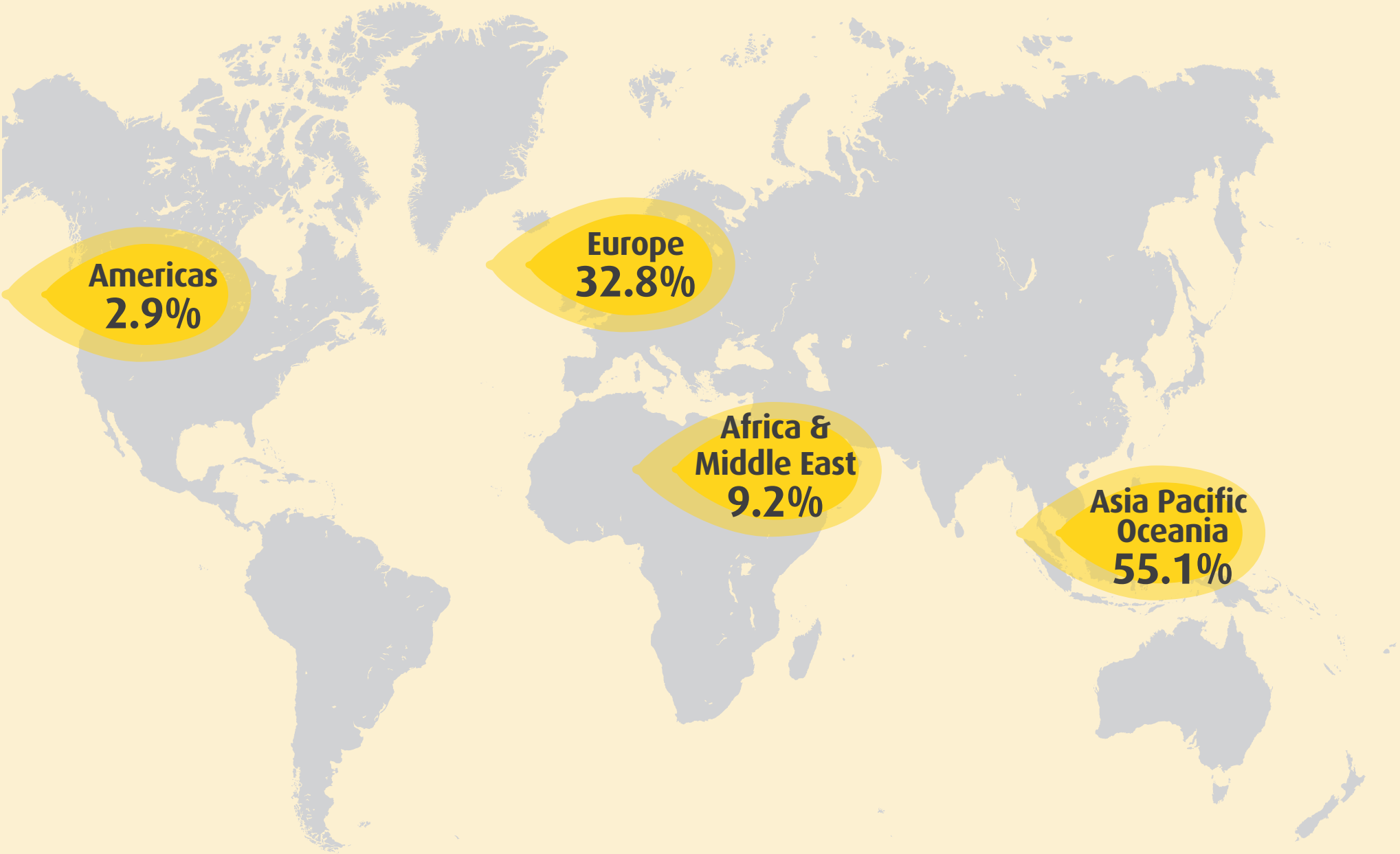
27-30



30-32

Australian almonds are graded as: Fancy, Extra Supreme, Supreme, and Manufacturing.

Major Export Regions 2017



Australian Export Markets - 2017 Marketing Year (March 2017 - February 2018)

Fifty countries now buy Australian almonds, with India being Australia's largest overseas market. Spain, Germany and the USA were also large markets for Australian almonds in 2017 and sales to the Asia Pacific Region increased substantially.

The Australian almond industry is positioned to grow strongly over the next five years. The growth in recent plantings means that the Australian almond industry will remain export focused.



| | | INSHELL (TONNES) | KERNEL (TONNES) | TOTAL (TONNES) | TOTAL \$ AUD | % CHANGE FROM 2016 MY |
|---|--------------------------------------|---------------------|--------------------|----------------------|----------------------|--------------------------|
| ASIA PACIFIC | NORTHEAST ASIA | | | | | |
| | CHINA (EXCLUDING SARs & TAIWAN) | 128 | 510 | 600 | \$5,573,983 | 88% |
| | HONGKONG (SAR OF CHINA) | 87 | 260 | 321 | \$2,420,946 | -83% |
| | JAPAN | 50 | 512 | 547 | \$4,851,034 | 58% |
| | KOREA, REPUBLIC OF | - | 60 | 60 | \$588,282 | -15% |
| | TAIWAN | - | 2 | 2 | \$29,136 | 29% |
| | TOTAL NORTHEAST ASIA | 265 | 1,343 | 1,529 | \$13,463,381 | -42% |
| | SOUTHEAST ASIA | | | | | |
| | BRUNEI DARUSSALAM | - | 0 | 0 | \$2,905 | -13% |
| | INDONESIA | - | 17 | 17 | \$163,062 | -94% |
| | MALAYSIA | 40 | 106 | 133 | \$1,083,772 | 264% |
| | PHILIPPINES | 1 | 19 | 19 | \$262,430 | -80% |
| | SINGAPORE | - | 253 | 253 | \$2,084,112 | 36% |
| | THAILAND | 155 | 780 | 889 | \$7,840,516 | -47% |
| | VIET NAM | 4,770 | 1,024 | 4,363 | \$29,945,673 | 46% |
| | TOTAL SOUTHEAST ASIA | 4,966 | 2,199 | 5,675 | \$41,382,470 | 7% |
| | SOUTH/CENTRAL ASIA | | | | | |
| INDIA | 22,727 | 2,286 | 18,195 | \$158,323,028 | 23% | |
| PAKISTAN | 258 | 401 | 582 | \$4,419,329 | 138% | |
| TOTAL SOUTH/CENTRAL ASIA | 22,986 | 2,687 | 18,777 | \$162,742,357 | 25% | |
| AUSTRALASIA/OCEANIA | | | | | | |
| FIJI | - | 15 | 15 | \$127,440 | -13% | |
| NEW ZEALAND | 113 | 1,992 | 2,071 | \$18,419,100 | 13% | |
| PAPUA NEW GUINEA | 0 | 0 | 0 | \$5,953 | -84% | |
| TOTAL AUSTRALASIA/OCEANIA | 113 | 2,007 | 2,086 | \$18,552,493 | 13% | |
| TOTAL ASIA PACIFIC | 28,330 | 8,237 | 28,068 | \$236,140,701 | 13% | |
| EUROPE | WESTERN EUROPE | | | | | |
| | BELGIUM | - | 318 | 318 | \$2,100,405 | -25% |
| | DENMARK | - | 1,072 | 1,072 | \$7,270,604 | -2% |
| | FRANCE | - | 1,060 | 1,060 | \$7,928,025 | 2% |
| | GERMANY | 34 | 3,809 | 3,833 | \$31,755,218 | -17% |
| | GREECE | 2 | 129 | 130 | \$998,578 | -36% |
| | ITALY | - | 1,215 | 1,215 | \$9,056,487 | -35% |
| | NETHERLANDS | 238 | 2,597 | 2,764 | \$20,912,436 | 35% |
| | NEW CALEDONIA | - | 1 | 1 | \$8,938 | 44% |
| | NORWAY | - | - | - | - | -100% |
| | SPAIN | 793 | 5,502 | 6,057 | \$39,419,538 | -49% |
| | SWEDEN | - | 297 | 297 | \$2,100,777 | -16% |
| | SWITZERLAND | - | 328 | 328 | \$3,035,308 | 20% |
| | UNITED KINGDOM | 40 | 1,376 | 1,404 | \$10,882,567 | 144% |
| | TOTAL WESTERN EUROPE | 1,107 | 17,704 | 18,479 | \$135,468,881 | -25% |
| | CENTRAL & EASTERN EUROPE | | | | | |
| | CROATIA | 16 | 102 | 113 | \$940,023 | -16% |
| | CZECH REPUBLIC | - | 20 | 20 | \$140,003 | - |
| | POLAND | - | 453 | 453 | \$3,675,915 | -6% |
| | RUSSIAN FEDERATION | - | 35 | 35 | \$352,942 | - |
| UKRAINE | - | - | - | - | -100% | |
| TOTAL CENTRAL & EASTERN EUROPE | 16 | 609 | 620 | \$5,108,883 | -2% | |
| TOTAL EUROPE | 1,124 | 18,313 | 19,099 | \$140,577,764 | -24 | |
| MIDDLE EAST & AFRICA | MIDDLE EAST | | | | | |
| | JORDAN | - | 55 | 55 | \$526,031 | 200% |
| | KUWAIT | 0 | 181 | 181 | \$1,664,316 | 20% |
| | LEBANON | 0 | - | 0 | \$2,330 | -100% |
| | QATAR | - | 37 | 37 | \$345,376 | - |
| | SAUDI ARABIA | 0 | 412 | 412 | \$3,389,299 | 222% |
| | TURKEY | 51 | 846 | 881 | \$7,133,389 | -39% |
| | UNITED ARAB EMIRATES | 168 | 2,404 | 2,522 | \$21,632,021 | 35% |
| | TOTAL MIDDLE EAST | 219 | 3,934 | 4,088 | \$34,692,762 | 3% |
| | NORTH AFRICA | | | | | |
| | EGYPT | - | 262 | 26 | \$2,330,599 | -26% |
| | LIBYA | - | 128 | 128 | \$810,497 | - |
| | TUNISIA | - | - | - | \$- | -100% |
| TOTAL NORTH AFRICA | - | 390 | 390 | \$3,141,096 | -60% | |
| SUB-SAHARAN AFRICA | | | | | | |
| MAURITIUS | 16 | - | 11 | \$146,865 | - | |
| SOUTH AFRICA | - | 202 | 202 | \$1,551,281 | 105% | |
| TOTAL SUB-SAHARAN AFRICA | 16 | 202 | 213 | \$1,698,146 | 117% | |
| TOTAL MIDDLE EAST & AFRICA | 236 | 4,526 | 4,691 | \$39,532,004 | -7% | |
| LATIN AMERICA /CARIBBEAN | LATIN AMERICA/CARIBBEAN | | | | | |
| | ARGENTINA | - | 217 | 217 | \$1,644,437 | 324% |
| | URUGUAY | - | 17 | 17 | \$87,057 | - |
| | TOTAL LATIN AMERICA/CARIBBEAN | - | 235 | 235 | \$1,731,494 | 357% |
| AMERICAS | NORTH AMERICA | | | | | |
| | CANADA | - | 2 | 2 | \$46,200 | -8% |
| | UNITED STATES | | | | | |
| UNITED STATES OF AMERICA | 19 | 2,235 | 2,248 | \$10,509,608 | -43% | |
| TOTAL AMERICAS | 19 | 2,472 | 2,485 | \$12,287,302 | -38% | |
| WORLD TOTAL | | | | | | |
| | | 29,708 | 33,547 | 54,343 | \$428,537,771 | -8% |

*Destinations with sales above 50 Tonnes Shown

Source: ABS, ABA

Our Marketers



ALMONDCO

A name synonymous with premium quality

Exporting to over 40 countries, we are committed to consistently delivering premium Australian almond products to our customers.

About Almondco

Established in 1944, Almondco Australia has grown to become a leading marketing strength of the Australian almond industry, processing a major share of Australian almond production at our world-class facility in Renmark, South Australia.

Grower focus

Almondco sources product from over 85% of Australian almond growers, located throughout Australia's finest almond growing regions: Adelaide, Riverland, Sunraysia and Riverina.

Our quality commitment

Our point of difference is quality. We know this because our customers consistently tell us. We are proudly accredited under the British Retail Consortium (BRC), and our in-house 'Almondco Quality System' (AQS) incorporates ISO and HACCP, surpassing national and USDA industry standards.

We are proud of our technology

- Dedicated, purpose built processing plant.
- State of the art, in-line, chemical free pasteurisation technology
- Optimal food safety treatment of each, individual almond
- Maintains the same great taste, essential nutrients and sensory appeal



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When you deal with NPA, you deal direct with the grower and processor.
There is no middle man. We are able to control everything from tree to trade.

NPA Almonds

NPA Almonds is one of the major processors of almonds in Australia. NPA Almonds sorts and packs its products to international standards, whilst still having the flexibility to meet specific customer requirements and specifications. The Riverland region of Australia is recognised as having an ideal climate for almond growing.

We can provide all major varieties and sizes of Australian grown almonds and we specialise in the supply of natural brown kernels and inshell.

Our modern factory, located at Loxton, South Australia, is modelled on world best practice and utilises up to date sorting technology.

Our experienced staff ensure the final product meets the expectations of our customers. All growers maintain independently audited quality management systems.

NPA almond products are sold under the Riverland Almonds brand.



NPA Almonds

Natural brown
almond kernels, inshell
almonds, blanched
and value added
almonds.



ABOUT NPA

The vast majority of NPA almonds are grown by its shareholders and directors. They are pioneers of the Australian almond industry, with almost 150 years of combined experience in the growing, processing and marketing of Australian almonds.

At NPA, we endeavour to understand your nut business so we can best serve your requirements. Being a dynamic organisation, we can react quickly to the needs of our customers, by tailoring our products to suit the peculiarities of the markets within which they operate.

OUR QUALITY PROMISE

NPA Almonds has a well established quality culture. Our employees are committed and strictly adhere to quality control procedures, HACCP program disciplines, food safety and hygiene protocols. Our Loxton processing facility has SQF2000 accreditation and complies with Australian grocery retailer vendor quality management systems.

Almonds are supplied fresh from the orchards and our finished product is sampled and independently tested.

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Olam is now the second largest grower of Almonds globally with over 30,000 acres of orchards in Australia and over 7,500 acres in California.

All almonds that Olam supplies from Australia are grown on our own orchards. Almonds require a Mediterranean climate and are therefore commercially produced in very few locations around the world. Olam is the only company globally growing almonds in both hemispheres. Hence, Olam is able to deliver new season almonds to consumers on a constant basis.

Our orchards predominantly grow Non Pareil, Carmel and Price varieties across 11 farms totalling 30,000 acres in the prime Sunraysia growing region in southern Australia.

The farms have state of the art irrigation infrastructure and technology and incorporate high levels of mechanisation. We adopt the latest agronomy practices to produce excellent yields and quality of almonds.

Olam has built one of the world's largest hulling, shelling and processing facilities to accommodate our entire production in Australia. This state of the art facility will ensure consistent product quality, traceability and food safety.

Olam is the only company to invest in our own marketing and distribution offices in all major almond consuming regions, which enables us to provide superior customer service in all these markets.



Olam Orchards Australia

Level 4/437 St Kilda Road, Melbourne, Victoria, 3004

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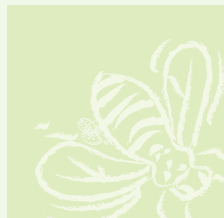
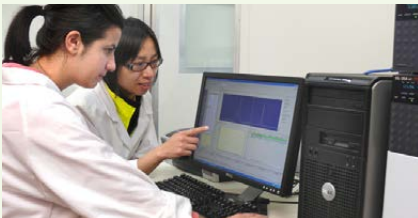


SELECT HARVESTS



Robinvale Processing Facility

A key component of our integrated business model is our state-of-the-art Robinvale processing facility. Robinvale has the capacity to process up to 40,000 tonnes of almonds. The latest automation technology ensures maximum efficiency, flexibility, product quality and food safety management.



About Select Harvests

Select Harvests is a grower, processor and marketer of quality Australian almonds based in North West Victoria.

We process our almond varieties, Non Pareil, Carmel and Price on State of the art electronic machinery, providing the customer with quality assured material. In addition to packing natural almonds, we also specialise in inshell almonds, blanched almonds and consumer packs.

We service a range of export markets including India, Asia, the Middle East and Europe and we sell branded and non branded consumer products to Australian supermarkets.

Select Harvests has a modern processing plant based in Northern Victoria with state of the art technology.

Quality

This facility helps drive the company's continuous quality improvement program. Investing in leading electronic sorting equipment ensures a highly accurate grading process. Climate controlled warehousing ensures product freshness and improved shelf life. An on-site chemical testing laboratory undertakes quality analysis prior to shipment. Our accreditations include HACCP and SQF. We also have pasteurisation technology available to further enhance product safety and quality.

Contact

Laurence Van Driel: lvandriel@selectharvests.com.au



Value added processing

Select Harvests undertakes a range of value added processes to meet the needs of its customers from food manufacturers, distributors, retailers and consumers. Activities include blanching, roasting, flavouring, cutting, blending, and packaging to satisfy a number of retail and industrial requirements.

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Bright Light Agribusiness is the largest and fastest growing private company in Australia. We grow our almonds with the latest irrigation infrastructure & technologies. The orchards contain trees ranging in age from recently planted through to full maturity, with increasing production as the younger trees develop.

Our almonds are grown throughout the Sunraysia region of Victoria. One of our great advantages is that we offer our new season Australian almonds to the world at their freshest when the northern hemisphere growers are in their off season.

Our range of almonds consists of non-Pareil, Carmel, Monterey and Price varieties, which we harvest utilising highly mechanised equipment. We export to the World.



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SELECT HARVESTS

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MEET our MARKETERS



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