

Australian Almond Industry Communications

Jo Ireland
Almond Board of Australia (ABA)

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AL08014

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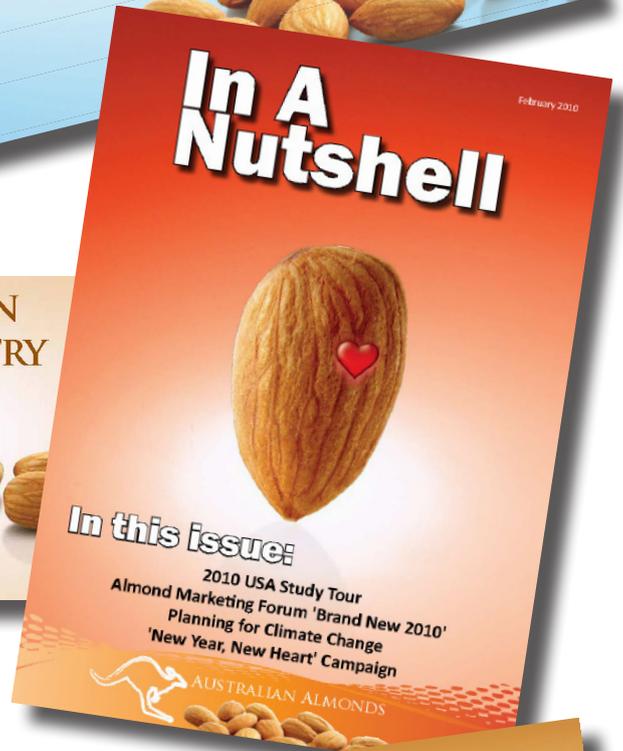
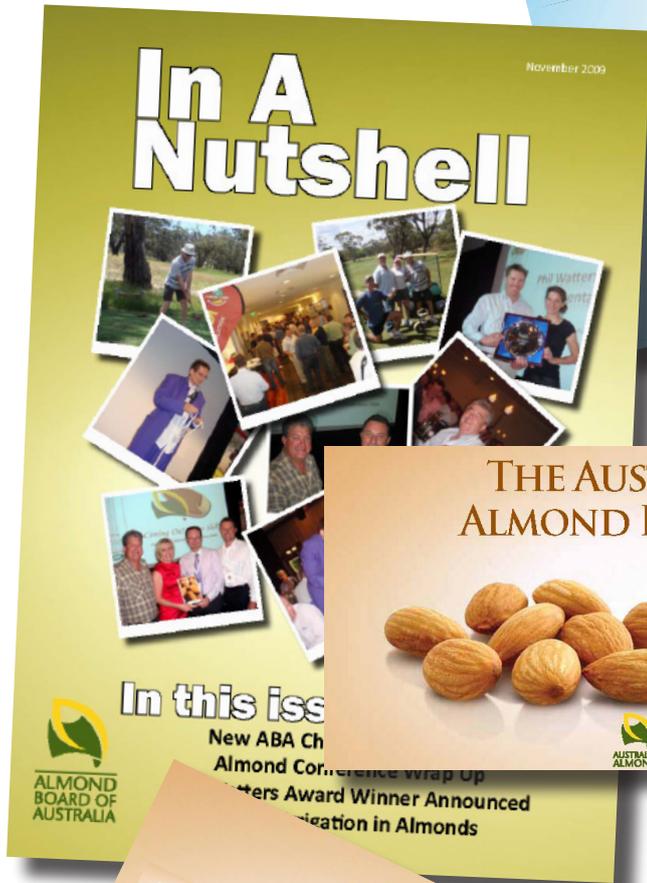
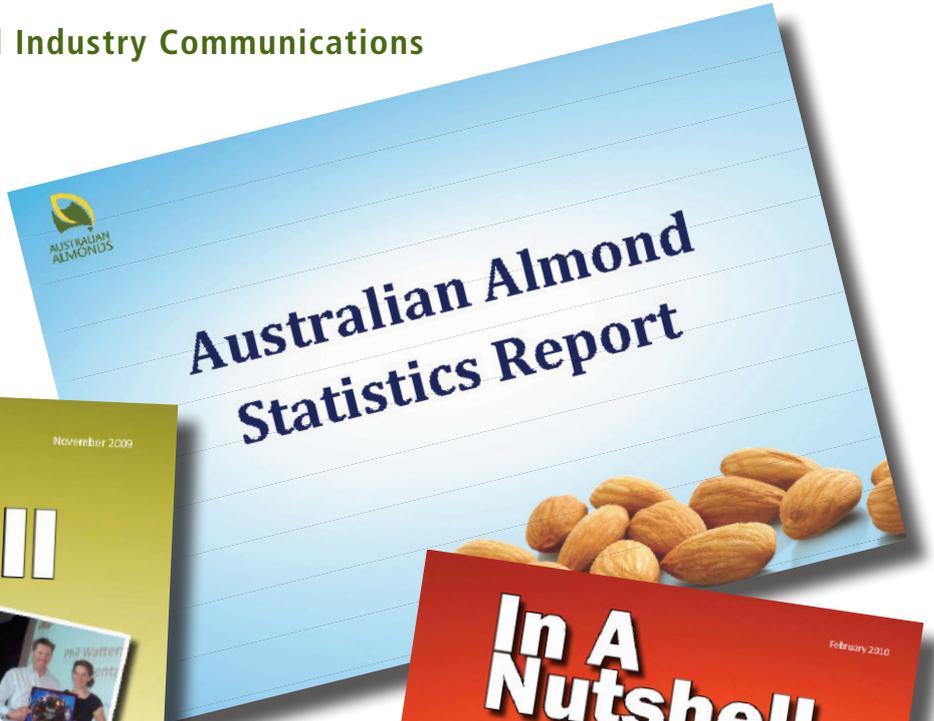
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FINAL REPORT

AL08014 - Australian Almond Industry Communications

Prepared by:

Jo Ireland
Communications Manager
Almond Board of Australia
30 June 2011





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Project Title: Australian Almond Industry Communications
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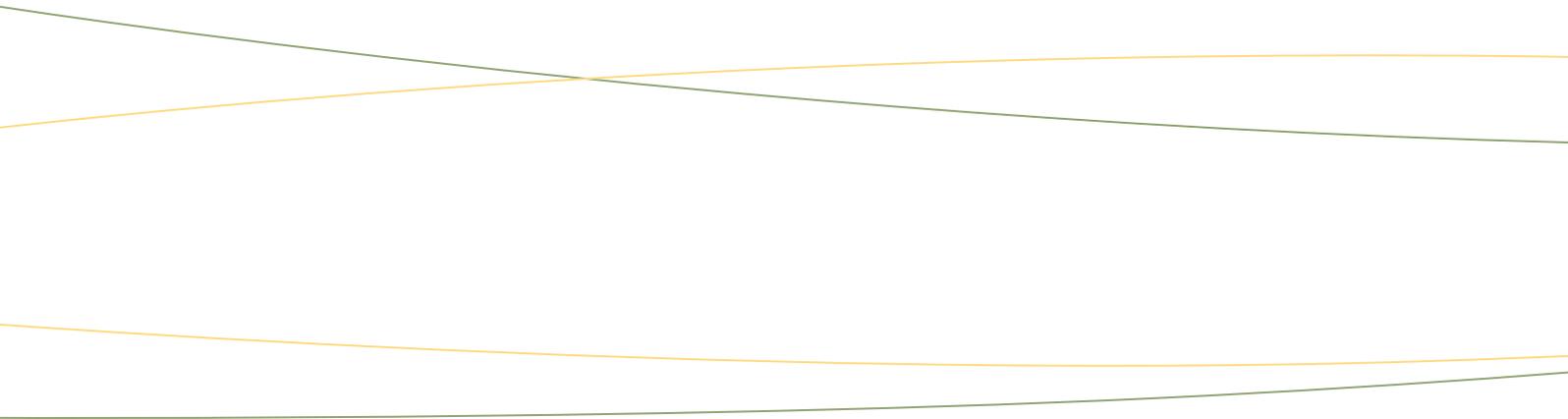
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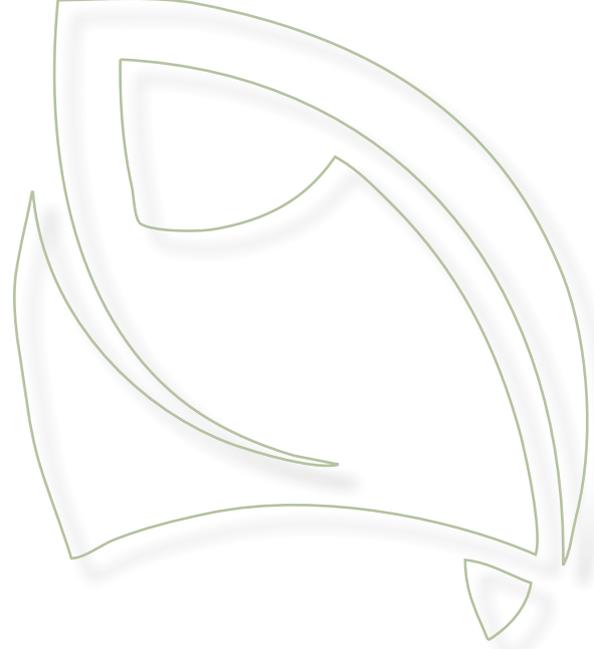
This report presents an overview of the
Australian Almond Industry Communications Project AL08014.

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Media Summary

The Australian Almond Industry Communications project focuses on providing a broad range of timely information to all Australian almond industry stakeholders and interested parties such as Horticulture Australia Ltd.

The almond industry in Australia is a vibrant, cohesive and rapidly expanding industry. Recent high level of corporate investment in the industry has brought an influx and expanding base of industry stakeholders. It is essential that communications are available to all industry participants and service providers in a variety of formats to suit the diverse nature of audiences.

The industry comprises many growers and people in associated businesses from a wide geographic and social cross section. Different communication methods are suited to different people and this project utilises a diverse range of mediums including electronic and written media, with integrated references so each contain links with others.

In response to a recognised lack of accurate statistical information regarding the Australian almond industry, the ABA facilitates and manages an Industry Statistics Collection program. Initially this program encompassed an annual planting survey, however scope of information collection was extended to encompass production, sales (domestic and export) and consumption figures. The cohesive nature of the Australian almond industry has contributed to an effective information collection system, providing the underlying basis for much of the industry's communication activities.



Introduction

The ABA is extremely well positioned to undertake and provide industry communications due to its broad membership base, comprising almond growers, processors and marketers, with grower membership currently representing 95% of planted acreage. Associate membership is also taken up by an extensive range of industry service providers including nurseries, beekeepers, banks, investors, chemical suppliers and researchers.

Furthermore, the ABA utilises its connections with almond processors to capture contact details of growers who are not members of the ABA. All of these contacts are included in communications distribution, capturing an estimated 98% of Australian almond growers.

This project encompasses a wide range of industry communication activities, including:

- “In A Nutshell” Quarterly Industry Newsletter
- Annual Almond Planting Survey
- Annual Almond Industry Statistics Report
- Quarterly sales and production data collection and collation
- Annually updated Australian Almonds Information Booklet
- Regularly updated Industry Website, encompassing levy payer log-in section
- Hard copy distribution of HAL Final Reports to Australian Almond levy payers

These communications are intended for and distributed to a wide range of audiences including:

- Almond growers
- Almond processors and marketers
- Distributors, wholesalers and retailers
- Researchers
- Investors in the industry
- Industry service providers, including nurseries and beekeepers
- Government agencies
- Export contacts
- Partner organisations

Evaluations of communications activities have been undertaken to assess the program and effectiveness of communications. These evaluations were distributed through individually preferred methods, including interactive email, fax or post. Survey questions were designed to assess the quality, timeliness, frequency, format, distribution method and relevance of information provided to our industry contacts. This process was supplemented by informal evaluation processes and discussion with individual members. Findings from this annual evaluation process are taken into account when planning each year’s communications program.



Materials & Methods

“In A Nutshell” Newsletter

In A Nutshell is the official voice of the Almond Board of Australia and the quarterly newsletter published in February, May, August and November dedicated to the Almond Industry within Australia. This publication provides a network of information including:

- Current production and import/export
- Consumption and statistical data
- Quality standards & control
- New crop information
- Trade issues and government regulations
- Information on new promotional ideas and marketing activities undertaken on behalf of industry
- Technical information on growing and industry research findings
- Annual Industry Conference updates & information

Distributed throughout Australia and overseas to more than 600 industry stakeholders and an estimated readership of over 1950 the 'In A Nutshell' newsletter is available to the general public and interested parties via the Almond Board of Australian website www.australialmonds.com.au allowing download of the document. Circulation encompasses the full supply chain: all known Australian almond growers / levy payers, processors, marketers, exporters, distributors, wholesalers, retailers, investors, researcher and service providers including nurseries, beekeepers, government representatives, partner organisations.

Former ABA CEO Julie Haslett, current ABA CEO Ross Skinner and ABA Communications Manager jointly collaborated on writing, research and editing of this publication. Articles and content suggestions on best practice are provided and reviewed by Almond Industry Liaison Manager, Ben Brown. Decisions on the contents for this publication were also determined through consultation with research providers and the following advisory committees: Almond IAC, Almond Plant Improvement Committee, Production Committee and Marketing Committee, in addition to the ABA Board.

Website Development & Maintenance

The Almond Board of Australia website (www.australialmonds.com.au) provides one main home page, allowing integrated access for almond growers and industry members, health professionals, consumers, almond buyers and distributors. It provides registered almond levy payers restricted access via a log-in section to download recent research results, information on workshop presentations and is source of current and past almond research. Research outcomes are loaded onto the website when available and industry participants notified by other communication methods of the availability of these reports. This method allows any industry participants access to the latest outcomes of research and access to further information if desired.



Almond Industry Statistics

In 2005, the Almond Board of Australia embarked on an Industry Statistics Collection Program to facilitate the dissemination of accurate and timely information with respect to the Australian almond industry. A major component of this program is an annual survey of Australian almond growers intended to collect and update current planting data. Greater than 95% survey response was received in 2010 and it is currently estimated that the remaining 5% collectively represents approximately 300 hectares (740 acres) of almond plantings, being approximately 1% of total plantings. An internal database has been developed and is maintained and extended as required, for statistical data entry and analysis. This information is collated and printed as the Annual Almond Industry Statistics Report and includes information with respect to almond plantings, production, sales and consumption. Annual survey data is collected, collated, analysed and reported annually to assess almond plantings by age, variety, state, region, post code, tree spacings and irrigation type. This data is then consolidated and used to determine future production estimates: total, by state, by region and by variety. The plantings data provides the basis for crop forecasts for industry and the HAL R&D planning program. Production and sales data is collected from almond processor / marketers, including production forecasts and actual production by variety and by state. Sales data is collected by tonnage of exports and domestic sales, both in-shell and kernel. This information is supplemented by analysis of ABS data relating to almond exports, and then used to calculate Australian almonds production.

Quarterly position reports were introduced in 2009, in consultation with almond industry processors, marketers and exporters and summarises almond sales for each quarter, by variety and break-up of domestic and export sales by destination. This report is assessed against the Monthly Position Report issued by the Almond Board of California, the world's major almond producer.

Australian Almonds Booklet

Annually updated, the Australian Almonds Booklet is an Information Brochure summarising basic industry information in a format that is easy to understand, encompassing almond plantings, production, sales, varieties, life cycle, almond nutritional information and contact details for industry stakeholders. ABA Communications Manager, Jo Ireland is responsible for desk-top publishing, design and lay-out of all Almond Industry Communication Documents, including this booklet.

Communications Evaluation Survey

A communications evaluation was conducted in 2008 and again in 2010. The survey comprised of questions surrounding the Almond Board of Australia's communications activities, industry field days and information dissemination, and was compiled in conjunction with HAL.

This survey was distributed as an interactive document via email to all industry contacts and members, to be completed and returned with ratings on the most valuable resources and information provided to them by the ABA. This reflection process gauges the effectiveness and life-span of communications to industry and provide a clear picture of any gaps, and to help plan for future communications activities.



Results & Discussion

Attached to this Final Report are copies of the publications and documents created during this project.

“In A Nutshell” Newsletter

Published quarterly in February, May, August and November the ‘In A Nutshell’ newsletter was distributed to all known almond industry contacts including growers / levy payers, processors, marketers, exporters, distributors, wholesalers, retailers, investors, researcher and service providers including nurseries, beekeepers, government representatives, partner organisations. Nine issues of the magazine were produced, spanning from November 2008 to November 2010.

A list of articles that appear in each edition is included in the appendix of this report, as well as full copies of each edition that were produced and distributed.

Website Development & Maintenance

The Almond Board of Australia launched a new look www.australialmonds.com.au in March 2009. Overall, the new site is more visually appealing with a sleek appearance, and additional imagery making the site more interesting to look at. This major upgrade better integrated the industry and consumer sections of the site, as well as enhancing many aspects of our current site design. A new look and feel gave the site a well deserved makeover, complimenting the Almond Board’s marketing and promotional activities, and boasts a great new range of features for visitors to experience.

The user-friendly site contains information on the ABA’s and the Australian Almond Industry’s backgrounds, marketing and research and development programs, news and events and other developments within the industry, whilst allowing login access for almond levy payers (growers) to technical and research articles. The industry pages also contain links to useful water, drought and industry partner pages, as well as industry statistical data and conference information. New pages added to the site specifically cater to different audiences including media, health professionals, foodservice and manufacturing and almond trade will allow visitors to navigate easily to find information.

‘Enjoying Almonds’ consumer pages contain recipes, nutrition and health information, and information on our almond ambassadors. The ‘All about Almonds’ section answers questions commonly asked by consumers such as “Where are Australian almonds grown?”, “When are almonds harvested?” and “How to store almonds”.

Sections tailored to almond trade, foodservice and manufacturing contain information such as key dates for export and domestic trade shows, almond processing and marketing companies within Australia, information on Almond Marketing Forums, and promotional activities such as the “Australian Almond Awards”, competitions and other events.

Media pages within the site include a ‘Royalty Free’ photography gallery, where images can be downloaded for use in a range of publications free of charge. Our media releases and health research information feature heavily on these pages. Dedicated Health Professionals pages were also added, with sections including research papers on heart health, healthy weight and nutrition tables available for download.

Specific shopping pages are available for access from any page of the site, allowing online purchase of ‘Almond Tins’ and almond specific publications such as the “Almond Pest & Disease Guide” and “Integrated Pest Management for Almonds” book.

Pages within the website are continually updated with new and relevant information and reports as they become available, with email notification sent to interested parties once these documents and sections are uploaded or created.

A new area within the ‘Buying’ section of the website was launched in March 2011, specifically to engage the wider supply chain. The core objective of this new login section called ‘Almond Market Drivers’ is to grow the knowledge of the market and production. We share valuable information from the Nielsen Homescan research reports which will help us measure consumer behavior as well as the latest products launched around the world in our Datamonitor updates. These reports are provided to help understanding of the latest consumer and health information in conjunction with



the use of the Almond Board of Australia's calendar of events. This program looks to involve all members of our supply chain as key partners in this growth strategy.

Almond Industry Statistics

The Australian Almond Industry Statistics report was produced and distributed in May 2009 and again in March 2011. Information in these reports was sourced from the ABA's internal data collection activities, the Almond Board of California (ABC), the United States Department of Agriculture (USDA) and the Australian Bureau of Statistics (ABS).

Reports were distributed via a linked email blast to almond growers, processors, marketers and all industry contacts, notifying them of the availability of the report and directing interested parties to download the report from the Almond Board of Australia website – www.australionalmonds.com.au. Detailed articles on results from these reports were printed in the ABA's quarterly publication "In A Nutshell" and copies of the full report are distributed as part of information packs given to new industry contacts, government representatives and potential sponsors and investors.

The new website was announced in the May edition of the Almond Board's quarterly newsletter "In A Nutshell". The article depicted images of each section of the site – Consumer, Industry, Trade, Food Service & Manufacturing, Media and Health Professionals.

Australian Almonds Booklet

The 'Australian Almonds Booklet' was distributed to industry investors, government representatives and passed directly to almond importers, distributors and retailers at international and national trade events participated in by the Almond Board of Australia. It is available electronically for download from the ABA's website www.australionalmonds.com.au for any interested parties. An email blast was sent directly to all almond industry contacts allowing them to link directly to this document download.

A new brochure entitled 'All About Australian Almonds' was created in December 2009, replacing the Australian Almonds Booklet. This 16 page booklet contains basic facts about the Australian Almond Industry in a format that is easy to understand, including basic industry information, encompassing almond plantings, production and industry wide marketing and promotional information.

The 'All About Australian Almonds' booklet was distributed to industry investors, government representatives and passed directly to almond importers, distributors and retailers at international and national trade events participated in by the Almond Board of Australia. It is also available electronically for download from the ABA's website www.australionalmonds.com.au for any interested parties.

Communications Evaluation Survey

A survey comprising questions surrounding the Almond Board of Australia's communications activities, industry field days and information dissemination was compiled in conjunction with HAL to be distributed in early 2009, and again in April 2010. This reflection process gauges the effectiveness of communications to industry and provide a clear picture of any gaps and to plan for future communications activities.

These surveys are distributed as an interactive document via email to all industry contacts and members, to be completed and returned with ratings on the most valuable resources and information provided to them by the ABA.

Reports are then compiled from the data collected in the survey and has helped to outline a number of communications areas that are seen as vital to our industry and others that may be outdated and no longer necessary. The 2010 survey indicated that 80% of respondents rate overall communications from the ABA as either 'Important' or 'Very Important', and they are happy with current levels of communications and the range that is provided to them.



Recommendations

The combination of activities within this project are designed to provide the industry with relevant and timely information supported by on-going expertise and consultation to enable the development of programs that meet the communication needs of industry.

Comprising a range of publications, our communications are designed to deliver comprehensive and timely information in a format that meet industry stakeholder requirements. The ABA is very aware of the diversity of needs within industry and is committed to assisting all businesses with the information required in the areas of technical expertise and knowledge, training and staff support, supply chain and business skills and effective communication of levy funded projects. The suite of communication tools developed as part of this project also combine to enable ABA to communicate updates on outcomes from Across Industry Programs developed by HAL and other key organisations that interface with the ABA.

The aim of this project, which published nine editions of In A Nutshell as part of a range of industry publications and resources, was to enable the ABA to keep Australian almond growers informed of research results relevant to current and emerging situations, and to deliver progress reports on continuing projects. It also informed industry of technology uptake by growers. The objective was to effectively transfer information, particularly research results, to the Australian almond industry and its relevant others, resulting in better informed industry participants, able to make better business decisions. Feedback suggested that readers were satisfied with the content of the magazine, finding it useful, informative, interesting and relevant.

The outcomes of this project will also continue to be used as the platform to ensure that communications, public relations and marketing addresses relevant issues imperative to the future growth of the industry.

The project also identified the need to encourage growers to adopt new technologies for communication, namely email, so that more growers can readily access information. The value of almond industry communications was recognised through the project and work continues to be done in to improve both the quality and the relevance of information provided to industry.

Acknowledgments

The Almond Board of Australia would like to acknowledge the contribution of Horticulture Australia Limited in facilitating this project.

The ABA also acknowledges the work of the following people:

- Julie Haslett, former CEO, Almond Board of Australia
- Ross Skinner, CEO, Almond Board of Australia
- Brett Rosenzweig, Industry Development Officer, Almond Board of Australia
- Ben Brown, Industry Liaison Manager, Almond Board of Australia
- Joseph Ebbage, Marketing Program Manager, Almond Board of Australia
- Almond Industry Advisory Committee

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Please note the Almond Board of Australia Office will be closed from:

Wednesday, December 24th
and re-open on
Monday, January 5th

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development. In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties. Please contact the Almond Board of Australia office to discuss your membership options.

Advertising/Editorial

The Almond Board of Australia acknowledges contributions made by private enterprise through placement of advertisements in this publication. Any advertising and/or editorial supplied to this publication does not necessarily reflect the views of the Almond Board of Australia and unless

otherwise specified, no products and/or services are endorsed by this organisation.

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These projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



The Future Focus Leadership Group met in Sydney on 12 November to discuss the final draft of the Future Focus Strategic Plan.

The Leadership Group has representatives from across the supply chain including growers, markets, retailers, exporters, research agencies, HAL and Government.

Future Focus identifies a potential \$2.45 billion of whole-of-industry profit by 2020 if the opportunities of Future Focus are realized. This is almost three times the extra \$0.9 billion of profit growth that is projected for Australian horticulture by 2020 if current conditions and approaches continue.

By 2020 the domestic market is expected to grow by the equivalent of another city the size of Melbourne and the world market is expected to grow by over "600 Melbournes". Even if Australian Horticulture was only to pursue a fraction of that global market there is still huge potential.

The means to achieving the \$2.45 billion in profit is for growth in domestic sales, more export sales and increased productivity.

The first stages of Future Focus put serious investment into developing a sophisticated economic modeling tool specifically for Australian Horticulture, the first of its kind. This model will allow industries to see the effect of possible investment decisions and guide effort to where there is the most return.

The report identifies where collective actions can provide industry benefit that will give support to private enterprises' commercial activity. The report details the benefits that can be achieved through developing three "engines": research, information and policy. These then support three key program areas: building consumer demand program, market access program and a resource use program.

It also identifies key sub programs for development including novel product development, consumer satisfaction, maintain clean and green, promotion, productivity, export access, market intelligence, water, climate change and labour.

Implementing Future Focus will require a whole of industry investment strategy to fund the priority innovations identified. It will also require industry collaboration and coordination.

The next step is an extensive program of industry consultation and discussion before Future Focus is launched in May 2009.

Industry members are encouraged to view the Future Focus documents on the website www.futurefocus.org.au

Edition	Advertising Deadline	Material Deadline
February	January 15th	February 1st
May	April 15th	May 1st
August	July 15th	August 1st
November	October 15th	November 1st



Almonds Adopt Industry Residue Testing Program

The Australian almond industry is soon to adopt a national residue testing program, facilitated by the National Residue Survey (NRS) together with funding support from the ABA's Marketing Program.

Ian Reichstein Director of the National Residue Survey will meet with ABA, Riverland Almonds, Almondco and Selct Harvest on 15-16 December to sign contracts and provide sampling equipment and instructions.

The NRS is an operational unit of the Department of Agriculture, Fisheries and Forestry (DAFF) and operates on a cost recovery basis, funded principally by levies from participating industries.

Currently the NRS undertakes residue testing programs for a range of meat products, fish products, honey, eggs, grains, pulses and oilseeds, and five other horticultural products.

Commencing 2009, the NRS will contract analytical laboratories to perform random residue analyses on Australian almonds.

These laboratories are proficiency tested in order to ensure the validity of analytical results. Samples will be collected from the pack houses in accordance with NRS procedures and protocols, for monitoring to confirm that residues are below the maximum residue limits (MRL) set by our

major domestic and overseas markets.

The NRS, in consultation with the ABA, will continually monitor and update the Almond Overseas MRL table to reflect requirements set by Australia's major almond destinations. This MRL table currently includes Australia, Codex, EU, France, Germany, Spain, Hong Kong, India, Japan, Malaysia, UAE and USA.

A compliance report for the industry will be provided annually by the NRS: www.daff.gov.au/nrs

For further information, contact Julie Haslett at the ABA office.

Almond Chemical Screen 2009

The chemicals, listed in the following table, include those that may be used on almonds in Australia, as well as those, which may be important in terms of international trade:

Fungicides	Azoxystrobin	Cyproconazole	Herbicides	Bromoxynil	Napropamide	
	Captan	Dithiocarbamates		Carfentrazone-ethyl	Norflurazon	
Insecticides	Carbendazim	Iprodione	Diflufenican	Oryzalin	Organochlorines	
	Chlorothalonil	Propiconazole	Diquat	Oxyfluorfen		
	Copper		Glufosinate	Paraquat		
	Carbaryl	Phosphine	Glyphosate	Pendimethalin		
	Chlorpyrifos	Piperonyl butoxide	Haloxypop	Simazine		
	Clorfentezine	Pirimicarb	Isoxaben	Trifluralin		
	Diazinon	Propargite	Metals	Aldrin		Endrin
	Dimethoate	Pymetrozine		Chlordane		HCB
	Fenthion	Pyrethrins		DDT and metabolites		HCH
	Maldison	Pyridaben		Dicofol		Heptachlor
Methidathion	Spinosad	Dieldrin	Lindane			
Methiocarb	Tetradifon	Endosulfan	Oxychlordane			
Parathion methyl	Trichlorfon	Cadmium	Lead			
		Copper	Mercury			



New Constitution & Board Adopted

A new Constitution was adopted by ABA members at the 2008 AGM held during this year's Annual Almond Conference, 31st October 2008.

Copies of the ABA's new constitution are available for download from the Industry section of the ABA website:

www.australionalmonds.com.au

At the same meeting, three appointments were made to the ABA Board:

- Brendan Sidhu – Riverland Representative (re-appointed)
- Neale Bennett – Sunraysia Representative (re-appointed)
- Grant Birrell – Marketing Representative (new appointment)

The ABA Board comprises seven members, with one marketing representative position remaining vacant. Dr Ben Robinson Chairman of

the Almond Industry Advisory Committee (IAC) also attends ABA Board meetings in an ex-officio capacity.

The new committee will meet for the first time in Adelaide on Thursday, 29th January 2009.

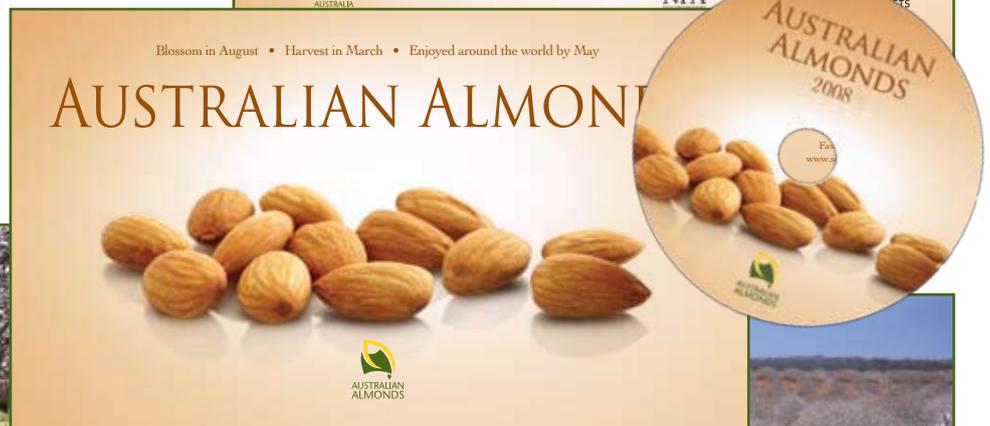
Almond Board Executive Committee	
Board Member	Position
Brenton Woolston	Chairman & Marketing Representative
Stephen Lynch	Deputy Chairman & Sunraysia Representative
Grant Birrell	Marketing Representative
Jim Pierson	Adelaide Representative
Brendan Sidhu	Riverland Representative
Tony Spiers	Riverland Representative
Neale Bennett	Sunraysia Representative
Dr Ben Robinson	Ex - Officio & IAC Chairman



Australian Almonds DVD Launched

The ABA recently launched an Australian Almond DVD, which highlights key facets of Australian almonds and the Australian Almond industry. This promotional DVD will be used across a wide range of audiences including export and domestic customers, government contacts and new industry entrants.

The DVD also features "Almond Ambassador" and award-winning Australian Chef, Stefano de Pieri and showcases footage of Australian almond orchards in blossom.



Stefano De Pieri talks about Australian almonds as part of the new ABA industry DVD



Latest Almond Figures Released

A new survey has revealed that Australian almond growers are among the most efficient irrigators in the Murray Darling Basin.

The ABA's 2008 grower survey has revealed that 90% of all plantings in the country are utilising drip irrigation systems, which is acknowledged as the most efficient method available.

The use of drip irrigation would be saving growers water and enhancing their chances of maintaining healthy trees during the drought. The survey also shows that only 9% of all plantings were still under traditional sprinkler systems.

Australia's total almond acreage, including non bearing acres, has increased six fold over the past eight years from 4,595 hectares in 2000 to more than 27,300 hectares in 2008. Future production increases are expected to reach 80,000 tonnes by 2015, being a three fold increase over current production.

The increased yield from maturing young orchards has compensated for the impact of severe water restrictions and has left the Australian almond industry well placed to help meet the increase in global demand for almonds.

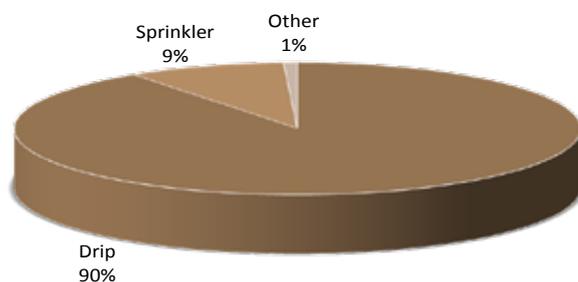
The ABA estimates that next year's national crop will be a record 36,100 tonnes. This revised estimate is an increase on the 2009 subjective forecast of 34,526 tonnes. This new estimate is up nearly 40% on 2008 production of 26,060 tonnes.

Australian almonds were shipped to more than 40 destinations in 2007/08, with exports totalling \$75 million. Australia is receiving increased demand from export markets such as India, Europe, Japan, Hong Kong, New Zealand and the Middle East. The increase in expected crop for 2009 will enable Australian suppliers to satisfy demand across all export markets.

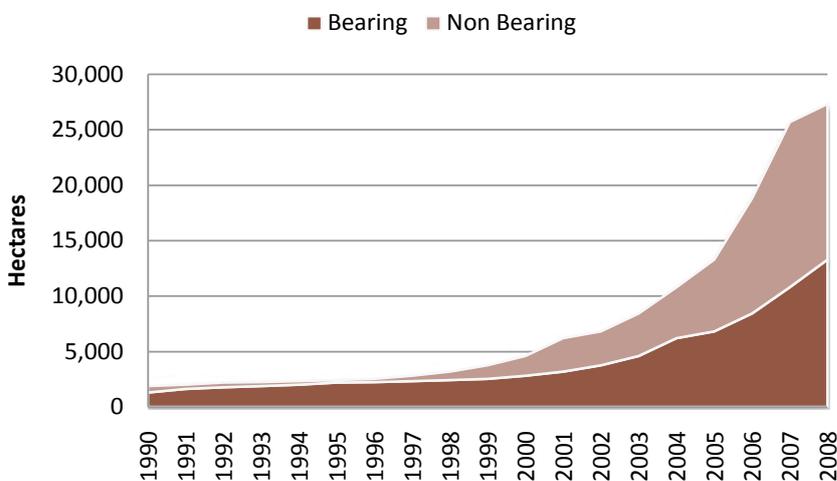
Copies of the Australian Almond Statistics 2008 Report are available from the ABA office, or for download from the Industry section of the ABA website: www.australionalmonds.com.au

- 24,400 hectares (90%) of Australia's almonds are irrigated drip, with less than 10% sprinkler irrigated
- Plantings have increased six fold over the past eight years: 4,595 hectares in 2000 to more than 27,300 hectares in 2008.

Almond Plantings by Irrigation Setup

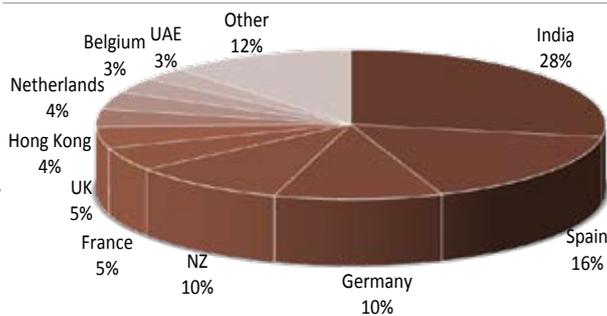


Australian Almond Plantings

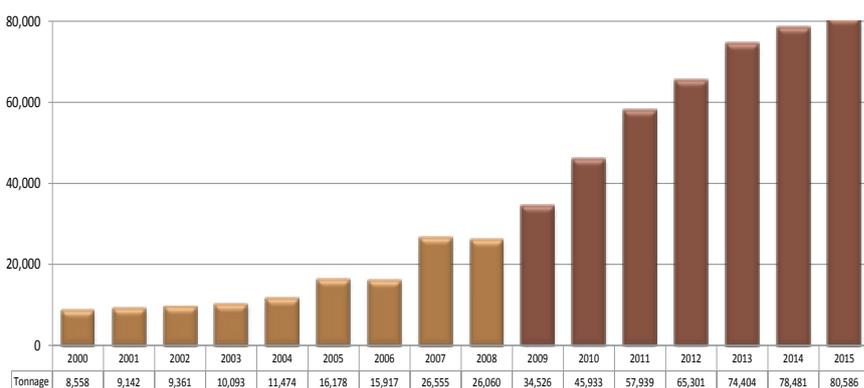


- Less than 20% of Australian trees have reached full maturity, with more than half of plantings non-bearing.
- Production totalled over 26,000 tonnes (kernel weight) in 2008.
- Australian almonds were shipped to over 40 destinations in 2007/08 with exports totalling \$75 million.

Top Ten Export Markets (Value) 2007/08



Australian Almond Production Projections





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We're Blossoming!

Conference Success!



The 2008 Australian Almond Industry Conference was hailed to be resounding success. Held at the award-winning Novotel Barossa Valley Resort, 29th – 31st October, the informative and entertaining conference program, impressive speaker line up and our largest ever industry exhibition attracted more than 200 delegates.

Day one of the program included a social golf day on the prestigious Tanunda Pines Golf course, sponsored by Select Harvests. Delegates enjoyed a memorable (although sometimes frustrating) chance to network with fellow industry members and partners.

The ambrose style day was well attended and competition was fierce with some avid golfers among the group. Overall winners for the day, 2 strokes under the card at 70 were Brendan Sidhu, Michael Costa, Geoff Ablett and William Snell, closely followed by John Gallard, Sholto Douglas, Matt Lloyd, Sam Tidhar and Andrew Meurant with a score of 73. Other winners on the day were 'Nearest the Pin' and 'Longest Drive' won by Michael Ward and Craig Wooldridge respectively.

The JackRabbit Welcome Function on Wednesday night provided a good chance for all to compare scores and discuss golfing techniques at a relaxing evening, preceding the official conference opening.

The 2008 conference was officially opened by the Honourable Rory McEwen, Minister for Agriculture SA.

Thursday morning's program then commenced with the Annual Levy Payer's Meeting and HAL update followed by results from the Almond Optimisation Trial and the latest findings from Almond Prune Rust and Breeding research.

The afternoon sessions focussed on irrigation research and pollination issues. Delegates were able to participate in an interactive panel session with pollination experts Dr Denis Anderson, Dr Mark Godwin, Dr Doug Sommerville and Trevor Monson (see page 8).

The Annual Almond Conference Dinner, sponsored by Netafim, on Thursday night

provided another chance for delegates to socialise with their industry peers.

Dinner included the announcement of the Phil Watters Memorial Award (see page 13 for details) and a chance for all to enjoy some fine food and wine.

The surprise entertainment was a light hearted and engaging performance by the amazing operatic voices of "The Three Waiters". Audience participation was fantastic to see, as everyone sang along and waived their napkins in the air!

The final day's program began with a comprehensive look at water and climate change, headed by the University of Adelaide's Professor Mike Young and Dr Penny Whetton from CISRO.

This was followed by an Australian Perspective session with ABA CEO, Julie Haslett and Joseph Ebbage, ABA's Marketing Program Manager. ABA's Annual General meeting was the final presentation before lunch, including discussion and adoption of a new ABA Constitution and appointment of new Board members (see page 4).

Jeff Oughton, Head of National Australia Bank's Economics division provided a light hearted look at the global economy, explaining the significance and recent volatility of financial markets.

The final presentation to round out the conference was from Shirley Horn, Global Marketing Manager of the Almond Board of California. Her presentation gave delegates a closer look at California's current marketing strategies. Shirley also provided an interesting look at almond news clippings worldwide on her 'Sizzle Reel' DVD.

A special thank you to all who participated, attended, or played a part in ensuring the success of this important industry event.

Copies of presentations from this year's conference are available for download from the Industry section of the Almond Board of Australia website:
www.australionalmonds.com.au.



Wayne Carroll, Anthony Wachtel, Julie Haslett and Dale O'Connell enjoy a round of golf.



The Annual Conference Dinner was a night to sing about - fine food, wine and entertainment.



Delegates were given a comprehensive look into Pollination issues in New Zealand by HortResearch's Dr Mark Goodwin.



'Charmed I'm Sure' - Shirley Horn of the Almond Board of California being wooed by the entertainment whilst Julie Haslett looks on.

We're Blossoming! Conference Success!



Bee king works on biological control

The CSRIO's Dr Denis Anderson is regarded as a world leader on bees.

He named the mite that could potentially wipe out Australia's native bee population *varroa destructor*.

Dr Anderson has tracked the Varroa mite from its origins in Asia and has learnt how it has evolved to be the deadly parasite that is wiping out honey bees all over the world.

The *varroa destructor* has infiltrated every honey bee country in the world except Australia.

He says it is inevitable that it will one day arrive on our shores. It has been in New Zealand since 2000 and was discovered in Papua New Guinea earlier this year.

It is on our doorstep and Dr Anderson concedes it is only a matter of time before it is discovered in Australia.

Dr Anderson's research team received the prestigious CSRIO Medal for their work on varroa last year. The \$50,000 research grant has been ploughed into helping Dr Anderson and his team develop a biological control for the mite.

Dr Anderson has discovered that the varroa is an instinctive creature that performs without choice certain tasks when it receives a certain signal. "We are working on switching off the signal that leads to them reproducing," he said. "I am not sure how long it will take, but I am convinced we are on the right track."

Dr Anderson said his research team have just embarked on the research to identify this crucial signal that he believes comes from the bee.

"We are only just starting down the discovery path and a lot of this is dependent on funding.

"But what we are saying is that we have opportunity now by doing all this research to actually switch off the Varroa mite. It's sort of like a genetic solution.

"We want to produce a bee that can't produce the signal at the critical point of the mite's life. If we do that we can wipe Varroa out of the bee world."

Living with varroa - The New Zealand experience

Dr Mark Goodwin has presided over the incursion of *varroa destructor* in New Zealand.

The devastating mite was first detected in the country in April 2000. Today, the country's feral bee population has been wiped out by the mite and commercial beehives are the only bees left.

Dr Goodwin told delegates at the conference that despite strict

exclusion zones being implemented across the country, nothing could stop the mite's advancement.

"I had the government asking me how much it would cost to eradicate Varroa, but in the end I had to say no amount of money would achieve such a result," he said.

"Bees can no longer survive in New Zealand without humans," Dr Goodwin said.

"Chemicals are used to eradicate Varroa from the beehives, while the feral populations have been wiped out."

Dr Goodwin said it is unclear how long it will be before the mite develops a resistance to the chemicals used, but suggested it was only a matter of time.

He also issued a devastating warning to Australia: "It is only a matter of time before Varroa reaches this country – it has reached places like Hawaii, Tonga, Papua New Guinea. How Australia does not have it is beyond belief actually."

Dr Goodwin indicated that the potential impact on Varroa in Australia could be far more extensive than in New Zealand.

"Even before Varroa (arrived in New Zealand) just about every crop was using paid beehives to come and pollinate them," he said. "From what I understand, that is not the case in Australia." It is estimated that only 20% of horticultural crops in Australia use paid beehives for pollination.



HortResearch New Zealand's Dr Mark Goodwin and Dr Doug Somerville from DPI New South Wales.



Record attendance at the Almond Board of Australia's Annual Industry Conference held in the Barossa Valley.

"We were rapt with the chance to showcase the range of products and services they can offer the almond industry."
John Gallard, Gallard Services

"It has been a very worthwhile event for our business,"
Andrew Brown, MAIT Industries

"The chance to support the industry and spend time with existing clients had been beneficial."
Nick Hall, NuFarm

"It is always a very worthwhile trip,"
Don Mayo, OMC

This is our first year we have been involved and I have been blown away with the professionalism and level of attendance. To be honest it has exceeded my expectations by a fair way and we will seriously look at increasing our involvement next year.
Stephen Flaherty, Landmark

Exhibitor Feedback

"We identified the value being involved several years ago and believe this is one of our 'must attend' conferences of the year."
Adam Lean, Netafim

"The ability to discuss and demonstrate some of the new technology that is available to help growers save water and fertilizer was invaluable"
"We will definitely be back."
Peter Keynes, AgriExchange

We're Blossoming! Conference Success!



Plenty of upside in the almond market

The woman responsible to selling California's almonds to the world believes she has only started scratching the surface of demand potential.

Global Marketing Manager, Shirley Horn, reports that the Almond Board of California (ABC) has just completed the first year of a bold new plan to make almonds the nut of choice across all major markets – which takes in North America, Europe, Japan, Taiwan, Korea, China and India.

"We have set ourselves two goals – to be the crop of choice on the production side and the nut of choice on the demand side.

"They are both tall orders, but that's where we are heading."

California produces 1.8 billion pounds of almonds a year, which represents 80% of the world crop. New plantings are set to increase that yield in the years ahead and Mrs Horn and her team have devised a multi-faceted marketing strategy to ensure they maintain the delicate balance between supply and demand.

"I am very optimistic about the upside potential of our industry," she said.

"Although we export 70% of our crop, the fact remains that if every North American in our target market – which is 51% of the population - ate an ounce of almonds a day, it would take our entire production to supply them."

Mrs Horn is realistic enough to acknowledge that isn't going to happen tomorrow, especially in the current

economic turmoil within the USA.

"We are facing difficult times and it may reach the point where all discretionary food spending may be cut. Now I don't think it will get to that, but we should never put all our eggs in one basket.

"That's why we need to focus on all our markets and identify the challenges and threats we may encounter so we can be prepared and anticipate market changes."

Observations from Shirley Horn

It's not all about a healthy eating

Almonds are perceived as a premium nut and that is where the ABC will focus a lot of its marketing energy.

"People all over the world – no matter what the economic conditions are – aspire to be more affluent.

"They aspire to be more premium, they aspire to be seen to be able to afford the nice things as life. And almonds are seen in almost all of our markets as a premium nut.

"We want to keep that.

"The challenge is going to be as we have recessions and depressions happening and whatever, to get people to continue to choose almonds even though they may carry premium price.

"Our challenge in the current economic crisis is to promote almonds as an essential indulgence."

Creating a sensual experience

Marrying almonds with dark chocolate will be a key plank in the

American marketing campaign.

"Our research is telling us that we need to make an emotional connection with consumers. By combining with chocolate we want to create an extra-sensory experience. People have an emotional attachment to chocolate already, so that's what we are going for."

Crunchability the key

The 'crunchability' of an almond is one of the most constant attributes that consumers talk about.

"Our research has shown that a strong element of the taste is the crunch. Those who love almonds refer to the 'crunch' time and time again.

"It seems to preserve its crunch when you marry it with things like ice cream, where other nuts absorb moisture more easily and lose something.

"Obviously 'crunchability' and the sensual side of almonds in chocolate are sub-conscious thoughts and it is our job to start talking them up and bring them into the consciousness so consumers can pinpoint why they love almonds over other nuts."



Dr Penny Whetton, Research Group Leader, Climate Change, CSIRO, during her presentation at the conference



Chairman Brenton Woolston, CEO Julie Haslett, Marketing Program Manager Joseph Ebbage and Almond Board of California's Global Marketing Manager Shirley Horn.

Congratulations and thanks for organizing another great conference (this was best so-far) - Excellent MC, guest speakers, entertainment and all run to schedule (should consider running an airline)! Well done! AF

It was a pleasure to meet you and your staff and to present at your conference. I appreciated the warm Australian hospitality, spirit of camaraderie and transparency of your industry members. A terrific event. Shirley Horn

A top program of speakers and a positive audience makes for a great conference, well done. Gerald Martin

Delegate Feedback

Thank-you for organising a very informative and interesting conference. The entertainment on Thursday night was also excellent! Greg White

Great Conference, it was well run well managed and interesting to say the least. The social benefits were the bonus, but in tough times to have a sense of cohesion between most parties involved probably is a new event for Almonds in Australia – well done!!! Chris Greig

We're Blossoming!



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Media Release - 4 November 2008

The Rudd Government has committed \$300,000 over the next two years to continue an important surveillance program for pests and disease in Australia's honey bee and pollination industries.

The National Sentinel Hive Program was established in 2000 at 27 sea ports around the country to monitor for honey bee parasites and exotic bees.

Recent outbreaks of bee diseases and pests have affected agricultural industries in a number of overseas countries.

A House of Representatives Standing Committee inquiry this year recommended the National Sentinel Hive

Program be continued to help protect the Australian industry.

Minister for Agriculture, Fisheries and Forestry Tony Burke met last month with key industry representatives and chair of the Standing Committee, Federal Member for Lyons Dick Adams, to discuss issues facing the industry.

"The Rudd Government recognises the importance of rigorous quarantine and biosecurity measures to protect our valuable agriculture, fisheries and forestry industries," Mr Burke said.

"The Australian honey bee industry is fortunate to be free so far of Varroa and other pests and disease affecting other countries – but we must remain vigilant.

"In addition to the \$300,000 commitment, I also asked Roger Beale AO to respond to the honey bee inquiry's findings in his report on our overall quarantine and biosecurity system."

According to figures released last week by the Australian Bureau of Agricultural and Resource Economics, the estimated gross value of honey and beeswax production in 2007-08 was \$75 million.

The figures show there were more than 1,700 commercial beekeepers in Australia during 2006-07.

Bees are also crucial for pollinating dozens of horticultural crops, as well as pastures, fodder and some broadacre crops.

Horticulture Industries Support Findings In New Report

Media Release

The evaluation report released this month by the Council of Rural Research and Development Corporations' Chairs confirms the value of Government and industry co-investment in primary production.

The most comprehensive evaluation of rural research and development ever undertaken in Australia, **Measuring economic, environmental and social returns from Rural Research and Development Corporations' investment**, has found for every dollar invested by the 15 Rural Research and Development Corporations (RDCs) projects return an average of \$11.

The undersigned, the peak industry bodies for Australian horticultural industries and members of Horticulture Australia Limited (HAL), support the co-investment model.

Rural R&D investment has been a key

factor in Australian farmers achieving among the highest productivity growth in the world for many years. The GVP for horticulture is currently \$8.5 billion, up from \$7.1 billion in 2005/06.

In addition to the direct benefit to rural industries, the evaluation shows RDCs generate significant economic, social and environmental benefits in areas rural industries and the Australian Government have determined as priorities.

In 2007/08 Horticulture Australia Limited invested \$73 million into more than 1100 projects in areas such as biosecurity, climate change, natural resource management, market access, productivity, value adding and improving the supply chain. While there are significant environmental and social benefits, because of the difficulty in measurement, these benefits are undervalued.

The evaluation sought out 32 randomly

selected projects across the 15 RDCs to give an indication of average returns across the portfolio and 36 highly successful projects to determine what sort of returns could be generated.

The sample of 32 randomly selected projects from a pool of 600 RDC projects delivered an average return of \$11 for each dollar invested in 2007 dollars, while the sample of 36 highly successful projects will return \$10.5 billion in quantified benefits. This is made up of \$5.5 billion in direct benefits to the rural sector and \$5 billion in spillover benefits to the wider community.

The evaluation also demonstrates the strong collaboration between RDCs, rural industry, Government and research partners and shows significant benefits are generated in areas targeted by the National Research Priorities and Rural Research and Development Priorities.



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Phil Watters Memorial Award

Dedicated To The Memory Of Phil Watters
(1974 - 2007)

A new industry award was announced at the Annual Almond Conference dinner on October 30th 2008.

The new award is dedicated to the memory of Phil Watters (1974 - 2007) - a widely respected individual, a dedicated Technical Officer, selfless employee and role model for young and upcoming horticultural students.

This award will be presented biannually at the Annual Almond Industry Conference dinner, commencing 2009.

The Phil Watters memorial award is open to any individual within the almond industry who contributes to almond production through either research and development, adoption of best practice and/or promotion of horticulture to the community.

Nominations are invited from people working in either the private sector or public sector. This includes (but is not limited to) owner-operated farms, corporate farms, private consultancy groups and government research institutions.

Nominations can be submitted by, or on behalf of, an individual. Nominations must focus on the contributions of that specific person.

Nominees must be based in Australia, or their contributions originate from an Australian origin.

Applicants must meet the minimum criteria established by the Selection Panel. Nomination forms must be fully completed.

Selection Criteria

The Phil Watters Memorial Award Selection Panel will consider the extent to which each nominee's contribution demonstrates any of the following criteria:

- Excellence and/or Innovation
- Adoption of best practice, or dedication to the improvement of almond production
- Positive influence on colleagues
- Community involvement in promoting horticulture to the wider community.

Eligibility

Any work, project, program or extension must have been undertaken or implemented between July 2007 and June 2009.

Nominees must have been working in their current position for at least 24 months.

Awards

The award to the successful individual winner of the Phil Watters Memorial Award will be decided by the Selection Panel and may vary from one ceremony to another. Examples of awards include an all expenses paid trip, domestically or abroad, to the value of \$10,000 AUD to:

- A related or relevant conference
- A workshop or short course
- A host almond orchard
- A host researcher and/or research institution



Philip James Watters

Phil graduated in Agricultural Science (BSc majoring in Horticulture) from the University of Adelaide in 1998. Following his graduation Phil was employed as the Technical Officer at Jubilee Almonds, Overland Corner, Century Orchards, Loxton and the Almond Board of Australia (ABA). During his employment with the ABA, Phil devoted himself to a world leading, almond trial at CT Farms, Loxton (CT Trial).

The CT Trial, "Optimisation of Australian Almond Growing in Australia" is a comprehensive experiment involving the high level management of a pulsed, drip irrigation system, optimum inputs of irrigation and nutrition, and canopy architecture. Without Phil's tireless efforts, the CT Trial would not have achieved its results, which exceeded existing Australian and world production standards.

Throughout Phil's employment he was extremely motivated in promoting the scientific field of Horticulture to young and upcoming, high school and tertiary students. His contagiously, enthusiastic approach to his work and the extension of this information, encouraged several students to consider horticulture as a career path.

How to Apply

For a copy of the nomination form please contact the ABA Office or visit

www.australionalmonds.com.au

Mail completed nominations, marked **Confidential** to:

Phil Watters Memorial Award
c/- Almond Board of Australia
PO Box 2246
BERRI SA 5343

Nominations must be received by Friday, 4th September 2009

Award will be presented at the 2009 Almond Conference Dinner.

How to Donate

To make a donation to the Phil Watters Memorial Award please contact the ABA Office or download a donation form from the ABA website:
www.australionalmonds.com.au



Nuts for Life

The end of the financial year saw Nuts for Life reviewing its activities in preparation for developing a new three year strategic plan 2009-2012.

Annual Report 2007/08

The full report and powerpoint presentation are available on the Nuts for Life website – contributors section for download.

External Evaluation

Nuts for Life program was evaluated in September by Lisa Cork from The Marketing Specialist agency. Her comments are as follows:

- The Nuts for Life program is adding real value to stakeholder investment. Over the next five years, Australian nut production is expected to nearly double - from 75,168 tonnes (2007) to 146,806 tonnes by 2012. While a majority of this growth will go export, there will be an increased volume of nuts to be sold in the domestic market. Increasing domestic consumption to keep up with production is imperative.

Nuts for Life has delivered real value in their Health Professional program through:

- The ongoing submission work with FSANZ for a high level health claim for nuts.
- The ongoing involvement in government diet and health initiatives (e.g. Core Food Groups Review) to ensure nuts health contribution is recognised.
- The strategic programs targeting Health Professional influencers have been well thought out and executed. As a result, Nuts for Life has contributed to changing the mindset of these targeted groups.
- Strategically, the Consumer program is the weakest program in Nuts for Life's total activity plan and for 2008/09 and beyond, this program needs to be re-worked to deliver more value. The consumer target market is too broad for the funds available.

Three Year Strategic Plan

A plan for the next three years has been developed and submitted to HAL for its funding call in November 2008. The Nuts

for Life Management Committee met twice over this period to finalise the plan. They requested that a similar proportion of funds be spent on R&D and consumer activities as has occurred over the last three years. A more targeted consumer campaign has been developed to target women 35 years plus who have been, or will be affected by heart disease. This plan will be available on the Nuts for Life website - contributors section – shortly.

Consumer PR Program

Our consumer PR program is in full swing with the following activities:

- Bimonthly food/ women's media releases – a quirky Christmas release has recent been distributed.
- Health based media releases – more scientific in nature to medical writers.
- Sponsorship of the 25th Australian Medical Writers Association conference 17-18th October 2008. Platinum sponsorship with the NHMRC - the only one to have a trade exhibition.
- Nut E Bytes – a quick snippet or tip is being emailed to media contacts – the first one highlighted the website and what's available.
- Nut E News – quarterly newsletter for media and health professionals highlighting research and stories of interest.
- Sponsorship of an issue of Your Newsletter – a newsletter written by GPs for GPs to provide to their patients.

Conferences

The final conferences and events for 2008 have taken place with Nuts for Life having a presence at:

- Natural Therapies Expo Sydney 21-22nd August and Melbourne 30-31st October 2008 with a trade exhibition and satchel inserts for both. Much different audience to the GPs and dietitian events with many expressing views on organics, GM, environmental impacts and surprisingly all copies of journal papers and literature review summaries were taken at each event.
- CSIRO Book Launch 25th September 2008 Parliament House Canberra – the launch of the CSIRO's new

book – The CSIRO Healthy Heart Program. Nuts for Life provided nut samples for the giveaway bags and was please to hear Dr Manny Noakes acknowledge the importance of nuts in her presentation.

- Rustic 08 26th October 2008 Vaucluse House Sydney – an old worldly experience – Nuts for Life provided show bags and assisted chef Liane Colwell with her recipe demonstration on nuts by offering the health benefits of nuts while she cooked and about 80 of the general public watched and listened.
- The University of Sydney Dietetic students' presentation 28th October 2008. Lisa Yates was asked to explain her role at Nuts for Life showcasing the variety of careers that dietitians can have while also educating them on the health benefits of nuts.

Australian Food Media Awards

Nuts for Life was a sponsor of the Food Media Club of Australia's Australian Food Media Awards Night on 27th September at the Sydney Convention and Exhibition Centre. It was a lavish affair and an exciting night for all. The *Age Epicure* section, took out the Nuts for Life Award for Best Food Section in a Metropolitan Newspaper. The Sydney Morning Herald *Good Living* food supplement was Highly Commended in this category. While the Geelong Advertiser GT section took out the Nuts for Life Award for Best Food Section in a Regional Newspaper and Bite, published in The Gold Coast Bulletin as highly commended. Unexpectedly Rosemary Stanton took out Ocean Spray Award for Best Nutrition Writing Highly Commended for her article "Spread the good word on nuts" published in Australian Doctor magazine.

Nuts for Life also participated in a "core foods" dessert area along with Meat and Livestock Australia, Australian Pork, Australian Egg Corporation and Dairy Australia and nuts samples were provided in the dessert area as well as in the show bag for guests. Nuts also featured in each course of the menu.

by Lisa Yates

Program Manager

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- 1/2 teaspoon salt
- 1/4 teaspoon chilli powder or cayenne pepper

Line a baking tray with baking paper. Place the almonds, brown sugar, and vinegar in a large heavy-bottom frying pan and cook over medium heat. Stir 3-5 minutes until the sugar melts, the almonds are well coated with the mixture, and there is no liquid at the bottom. If using salt or chilli powder, sprinkle evenly. Transfer the almonds to the prepared tray, separating the individual nuts. Set aside to cool before serving.

Makes two cups



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Julie Abbott
DMcMahon*

**from the staff of the
Almond Board of Australia**

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In A Nutshell



In this issue:



Almond Marketing Forum 2009

Almond Breeding & Evaluation

Indians want more Almonds

2008 Conference Evaluation

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Edition	Advertising Deadline	Material Deadline
May	15th April	10th May
August	15th July	10th August
November	15th October	10th November
February 2010	15th January 2010	10th February 2010

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development.

In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties.

Annual fees are:

Full Membership: \$180

Associate Membership: \$100

Nutgrower Subscription: \$80

Advertising/Editorial

The Almond Board of Australia acknowledges contributions made by private enterprise through placement of advertisements in this publication. Any advertising and/or editorial supplied to this publication does not

necessarily reflect the views of the Almond Board of Australia and unless otherwise specified, no products and/or services are endorsed by this organisation

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These projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



Diary Date



at the

Novotel on Collins

270 Collins Street, Melbourne

Thursday, 2nd April, 2009

you are also invited to attend dinner following the forum in the

Atrium Room, Novotel on Collins

270 Collins Street, Melbourne

dinner tickets \$75/pp

**To register your interest
please RSVP by Monday, March 23rd**

to Jo Ireland at the Almond Board of Australia
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Orchard Management Specialist Shares Insights

Dr Bruce Lampien Speaks With Local Almond Growers

By Ben Brown - Industry Liaison Manager

Dr Bruce Lampinen is an Integrated Orchard Management/Walnut and Almond Specialist who has responsibilities of coordination of extension teaching and research activities for almonds and walnuts on a statewide basis.

Dr Lampinen cooperates on three regional almond variety trials in Butte, San Joaquin and Kern Counties.

His research expertise and findings all originate from one primary area of orchard management - the role and affect of irrigation management. With a strong background on this topic Bruce's research has lead him to investigate the influence and inter-relationship of irrigation management on;

- light interception, canopy coverage (hedging vs non-hedged) and affect on yield,
- light interception, canopy coverage and affect on spur longevity,
- light interception, canopy coverage and affect on orchard micro climate and food safety issues such as salmonella, and
- irrigation management and its affect on the moisture level of almond fruit, stockpiling conditions, mould development and potential for aflatoxin.

Some of the main topics of discussion from Bruce's talk included:

- The use of a pressure bomb to provide a plant based measurement of stress. Pressure bombs are very complimentary to water use budgets, crop factors, and soil moisture monitoring equipment.
- Midday stem water potentials of -14 to -16 bars (i.e. pressure bomb readings) during hullsplit can lead to decreased incidence of hull rot without significant impacts on yield.

"Soil temperature is the most important factor influencing Salmonella survival"

- When an almond tree has maximised its vegetative growth and filled its allotted space there has to be a decision or trade-off made between;
 - slowing vegetative growth, maintaining 90-100% light interception/canopy cover and maintaining yield, and
 - maintain vegetative growth and introduce a pruning/hedging regime which will increase light interception, enable easier orchard access, reduce the risk of food safety issues, improve nut quality but reduce overall yield.



- Almond production potential is approximately 558kg/ha of kernel per 10% light interception with a theoretical maximum of approximately 5,500 kg/ha to 6,000 kg/ha.
- The orchard with Salmonella outbreak in California is a highly productive orchard, has maximum light interception and lots of shading, clay loam topsoil, micro-sprinklers, moderate levels of natural rainfall, and consequently a highly moist environment with very little drying of the orchard floor. The source of Salmonella has never been identified and still exists today.
- Soil temperature is the most important factor influencing Salmonella survival.
- Salmonella can migrate from the husk into the shell and kernel.
- Threshold for potential mould growth is >70% relative humidity in stockpiles (i.e. 0.7 water activity).
- Mould growth is more of a problem on the north and west facing slopes of a stockpile where water condenses and runs down tarps.
- Lower edges of stockpiles and unevenly made stockpiles with troughs are more conducive for conditions of mould growth.
- Long stockpiling of greater than 6 months are more at risk for mould growth.





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Minister Burke's Riverland Visit

Federal Agricultural Minister Learns About Almond Industry

Federal Agriculture Minister, Tony Burke spent time with ABA representatives during a recent visit to the Riverland, gaining an understanding of the Australian Almond Industry.

Brenton Woolston (ABA Chairman and Almondco Group General Manager) hosted a tour of Almondco's processing plant on Monday, 5th January.



Almondco Group General Manager, Brenton Woolston, Minister Tony Burke and Almond Board CEO Julie Haslett discuss the Australian Almond Industry

Minister Burke was accompanied by his advisor, Sophia Koutoulas and Peter Ottesen, DAFF General Manager Crops, Horticulture, Wine and Irrigation.

Following the tour, Julie Haslett (ABA CEO) presented an overview of the industry, highlighting the industry's growth and consequent reliance on a number of key factors:

- Water security
- Export growth
- Pollination, and
- Product quality as a major factor underpinning international competitiveness

The industry's reliance on effective quarantine and biosecurity procedures was also discussed, with specific relevance both to product quality and pollination.

Minister Burke was impressed by the level of cohesion evident within the



Brenton Woolston, Minister Burke and ministerial advisor Sophia Koutoulas during their tour of Almondco's processing plant

industry and the consequent level of information now available about the industry to assist in policy decision making and contingency planning.

During his visit the Minister also met with a number of growers in the region and leaders of horticulture commodity groups, irrigation trusts and local councils.

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Almond Breeding & Evaluation

New Partnership Established

By Ben Brown - Industry Liaison Manager

Since 1997, the Almond Board of Australia (ABA) in partnership with the University of Adelaide (UA) and Horticulture Australia Limited (HAL) have undertaken an almond breeding program.

The aim of the program is to produce new and improved cultivars (most particularly pollinator varieties) with characteristics such as increased production, self fertility and the following kernel characteristics: large size, oval shape, golden colour and good flavour.

To produce such a cultivar is a long-term and resource intensive process, involving two levels of evaluation:

1. primary evaluation and
2. secondary evaluation,

prior to any commercial release.

To date, project leader Dr Michelle Wirthensohn, has concentrated the majority of her efforts on the primary evaluation. To date, 82 parent cultivars and 303 different crosses have produced over 31,000 progeny in eleven years since commencement of the Australian almond breeding program.

The main objective of the primary evaluation is to rapidly screen the crosses and progeny to produce a dataset of results which are statistically

analysed for superior selections and priority parent cultivars for future crossing. Whilst all efforts are made to minimise planted hectares and capital investment, 31,000 progeny do require a lot of room. Consequently, over the last eleven years primary evaluation has occurred over two properties, Andrew Lacey's Lindsay Point property and more recently at the Riverland Vine Improvement Committee's property (RVIC) in Monash, South Australia.

Both of these relationships have been pivotal in the success of the project to date, and the effort, time and expense incurred by those people involved are greatly appreciated.

However, land restrictions have meant that since the last evaluation planting in 2007 at RVIC Monash, it has become necessary to find another property to undertake the future plantings.

This brought about a long term lease and formal relationship with the Victorian and Murray Valley Vine Improvement Association (VAMVVIA) and the New South Wales State Government (NSW DPI).

Land, infrastructure and labour has been accessed through this relationship to support a further five hectares of primary evaluation plantings.

Planting of an initial three hectares, encompassing 6,000 progeny took place in November 2008, a great success!

Due to the increase in land availability, tree densities have decreased and will ultimately allow for improved management and enhanced, more accurate assessment of the progeny.

The continuing relationship with Andrew Lacey and the new relationship with VAMVIA and NSW DPI will be critical to the future success of this project in undertaking future evaluations of both primary and secondary evaluation of new varieties



One of the new progeny planted at the new site - increased land availability has lead to decreased tree density.



The new almond breeding and evaluation site at Dareton in NSW planted in November 2008 with approximately 6,000 progeny over 3 hectares.

2008 Almond Conference Evaluation



We're Blossoming!



Overview

The 2008 Australian Almond Industry Conference was hailed to be a resounding success. Held at the award-winning Novotel Barossa Valley Resort, 29th – 31st October, the informative and entertaining conference program, impressive speaker line up and our largest ever industry exhibition attracted more than 200 delegates.

The Almond Board of California's global marketing manager Shirley Horn told conference delegates that their research indicated that the industry had "enormous" growth potential.

Mrs Horn said that if Australian industry could solve its water supply problems it was perfectly placed to capitalise on significant demand growth on the horizon. She cited China, India and Europe as key markets in her global "nut of choice" plan.

Mrs Horn was one of a number of guest speakers at the ABA Conference who gave timely insights into the issues facing the Australian industry. Others key speakers included water scientist Professor Mike Young, the CSRIO's chief bee researcher Dr Denis Anderson, former Reserve Bank economist Jeff Oughton, SA Agriculture Minister Rory McEwen and SARDI's drought irrigation project co-ordinator Mark Skewes.

Key conference messages included:

- Pollination and water security are the two biggest issues facing Californian and Australian industries.
- Australia is the only country in the world that has not been infiltrated by the deadly mite, varroa destructor, which will wipe out the feral (wild) bee population when it arrives. The mite has already been found in Papua New Guinea and New Zealand.
- The global financial crisis means growers should be 'stress testing their business' and keeping an eye on the global economy.

- The almond industry is one of the most efficient water users in the Murray Darling Basin, utilising the latest technology in fertigation, sub-surface drip irrigation and soil water monitoring equipment.

ABA chief executive Julie Haslett said the record attendance of over 200 delegates was a reflection on the quality of speakers who had committed to the conference.

91% of respondents rated the 2008 conference as 'Excellent' or 'Good'

"The Australian almond industry is winning widespread respect as an emerging force within the horticulture sector. Although we have several major issues to confront both individually and as an industry, we are fortunate that there is a level of co-operation and professionalism among our members that has allowed us to enhance our profile and be heard at all levels of government." She said.

Recommendations

The Almond Board of Australia is continually striving to improve the quality and relevance of the annual industry conference program it

provides. Feedback received from the 2008 Annual Industry Conference 'We're Blossoming!' was gained through a number of means including an interactive survey, telephone feedback and verbal interviews.

Delegates were emailed an interactive form to complete after this year's conference, asking them to rate various aspects of the event. 91% of respondents rated the 2008 conference as 'Excellent' or 'Good' overall. Broken down into two categories - 90% of delegates responded that the sessions included at the conference were 'Excellent' or 'Good'. Conference management, venue and organisation feedback indicated that 92% of delegates agreed that these aspects of the conference were 'Excellent' or 'Good'.

Future choice of venue will be aimed toward ensuring adequate space is available for plenary and break-out sessions, exhibitors, social events and catering.

An increase in delegate numbers it has become increasingly difficult to find regional venues that can cater for all of our conference requirements. Although the conference could be held in a capital city, it is felt that regional locations, in almond growing areas, are more suitable for delegates, and also helps to reduce costs.

Overall Conference Rating



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Promoting Australian Almonds

Good Food & Wine Shows

The Good Food and Wine Shows held in Melbourne, Sydney and Brisbane in 2008 again provided a key marketing platform for promoting almond consumption. A staggering 77,653 visitors attended the Melbourne and Sydney shows. With over 600 exhibits at each show, there were a multitude of things to see, try and buy. The 'Celebrity Theatre' this year was a major drawcard to the shows, patrons vying to catch a glimpse of the infamous chef Gordon Ramsay and see his antics in the kitchen first hand.

The ABA's "Australian Almonds" stand was extremely popular, with our new marketing materials giving the stand an added facelift. People were able to purchase almond snack tins, obtain copies of our recipe cards and most importantly, sample a handful of almonds. Our key message to consumers was well received, with many people keen to understand how better to include almonds in a healthy diet.

In 2009 will again see us exhibiting at the Good Food & Wine Shows in these three cities. A range of new materials will be launched at these shows, including a new almond tin design. The ABA's new marketing concepts will be highlighted at our upcoming Almond Marketing Forum on April 2nd in Melbourne. (See page 2 for more details regarding the forum).

GPCE Melbourne

GPCE (General Practitioners Conference and Exhibition) is Australia's premier primary care event, organised by GPs for GPs. It offers a program including informative seminars and hands-on workshops in a unique face-to-face format providing opportunities to assist GP's in attaining medical education and professional accreditation, as well as being integrated with Australia's largest primary care exhibition.

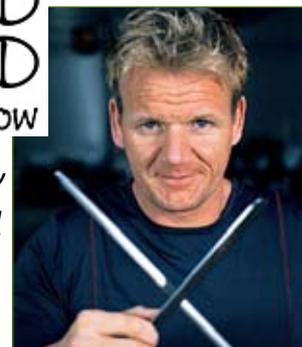
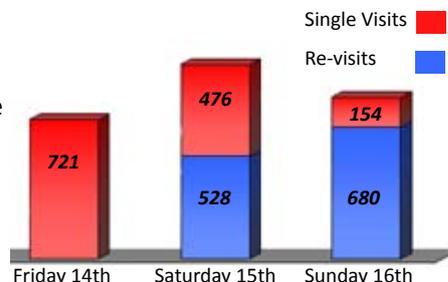
The opportunity exists for Australian almonds to become the 'first choice' of nuts for GP's when they are giving

nutritional advice to their patients and clients. Our aim is to raise the profile of Australian almonds as a good tasting, healthy snack, and to offer the GP's the opportunity to receive a free carton of our heart-shaped snack tins to give to their clients and patients.

Over 340 GP's attending the conference registered their names and addresses with our exhibition team, for inclusion on the ABA's database. This ever increasing list of health professional contacts will be an extremely valuable asset as we look to communicate findings from our key health research reports, currently under development. A good example of this is the 'Almonds and Lowering LDL cholesterol' report that we will email, prior our next exhibition at the Sydney GPCE conference in May 2009.

The ABA, staffed by an accredited dietitian for the shows entirety, proved very successful in communicating the nutritional science behind our almond health claims. It is envisaged that we will use an accredited dietitian for future health professional conferences.

This activity receives funding support through Horticulture Australia Limited (HAL) project AL07017: Educating Health Professionals as to the Health Benefits of Almond Consumption.



Infamous celebrity chef Gordon Ramsay appeared at the Sydney and Melbourne Good Food & Wine shows in 2008



The domestic "Australian Almonds" stand, where consumers can sample a handful of almonds and learn about some of the benefits of how to include almonds in a healthy diet.



Indians Want More Australian Almonds

Australian Almond Delegation Visits India

Australia's three biggest almond exporters headed a trade visit to India in December 2008 in a bid to further increase sales to the sub-continent.

Lead by Almond Board of Australia (ABA) chief executive officer Julie Haslett the delegation visited New Delhi for India's largest annual food, drink and hospitality exhibition – IFE-India.

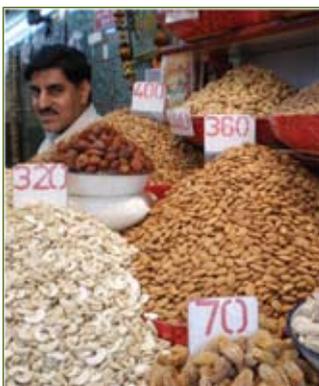
The trip included hosting a function for more than 100 almond distributors and government officials in India. The clear message from them being that Indian consumers prefer Australian Almonds, and will pay more for them.

India is Australia's biggest almond export market, making up 28% of almond exports, worth almost \$21 million a year.

"With Australian production levels set to double in the next four years, it is important for ongoing trade relations to formally acknowledge the contribution these distributors make

to our industry," Ms Haslett said. "We know that almonds already have a special place in the Indian culture.

"Indian families have long regarded almonds as brain food and it is common practice for them to feed their children a small portion of almonds daily to assist with their development. Ultimately, we aim to encourage families all over the world to do the same thing."



Indian consumers are prepared to pay more for Aussie almonds because of their appearance and size.

"They already appreciate what almonds can do for them and the fact that they are used as traditional gifts during the various festive seasons also tells us that they are considered a high value commodity."

Leading Indian importer, Rajesh Bhatia said the visit was an important milestone in the relationship with Australia's leading almond suppliers. He said the quality of the Australian product was the key to its popularity with Indian consumers.

"Australian almonds are lighter in colour and normally bigger than other imported almonds", he said. "They are regarded as a premium product and are given as gifts at weddings and during Diwali celebrations."

The Australian almond industry was reaping the rewards due to its commitment to supplying premium grade produce. "Our crop timing also fits perfectly with their high consumption periods".



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Phil Watters Memorial Award

Nominations Sought for New Industry Award



The Phil Watters memorial award is open to any individual within the almond industry who contributes to almond

production through either research and development, adoption of best practice and/or promotion of horticulture to the community.

Nominations are invited from people working in either the private sector or public sector. This includes (but is not limited to) owner-operated farms, corporate farms, private consultancy groups and government research institutions.

Nominations can be submitted by, or on behalf of, an individual and must focus on the contributions of that specific person. Nominees must be based in Australia, or their contributions originate from an Australian origin.

Selection Criteria

- Excellence and/or Innovation
- Adoption of best practice, or dedication to the improvement of almond production
- Positive influence on colleagues
- Community involvement in promoting horticulture to the wider community.

Eligibility

Any work, project, program or extension must have been undertaken or implemented between July 2007 and June 2009.

Nominees must have been working in their current position for at least 24 months.

Awards

The award to the successful individual winner of the Phil Watters Memorial Award will be decided by the Selection Panel and may vary from one ceremony to another. Examples of awards include an all expenses paid trip, domestically or abroad, to the value of \$10,000 AUD to:

- A related or relevant conference
- A workshop or short course
- A host almond orchard
- A host researcher and/or research institution

Applying & Donating

Please contact the ABA Office or visit : www.australianalmonds.com.au

Mail completed nominations, or donations marked **Confidential** to:

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Sweet and Crunchy Trail Mix

- 1 cup whole natural almonds
- $\frac{2}{3}$ cup dried apricots, diced
- $\frac{2}{3}$ cup sultanas
- $\frac{1}{2}$ cup banana chips or dried apple
- $\frac{1}{2}$ cup chocolate chips
- $\frac{1}{3}$ cup roasted sunflower kernels

Spread almonds in a single layer in shallow pan. Place in cold oven; toast at 180°C for 8-10 minutes, stirring occasionally, until lightly toasted. Remove from pan to cool. Toss with remaining ingredients until well mixed. Store in an airtight container.

Serves twelve

 THE SERIOUSLY HEALTHY HANDFUL.
www.australionalmonds.com.au

Calendar

February

23 - 26

Gulfood 2009
Dubai, United Arab Emirates
www.gulfood.com

March

6

Joint Meeting -
All Almond Committees
ABA Office, Berri

April

2

Almond Marketing Forum 2009
'Making Our Mark'
Novotel on Collins
Melbourne
www.australionalmonds.com.au

May

24 - 26

General Practitioners Conference &
Exhibition, Sydney
Sydney Showground, Olympic Park

24 - 26

PMA 'Fresh Connections' Conference
Hilton Hotel
Sydney
www.cievents.com.au/events/Fresh-connections_Registration

June

4

ABA Board Meeting

5-8

Good Food & Wine Show
Melbourne Exhibition Centre
www.goodfoodshow.com.au

July

3 - 5

Good Food & Wine Show
Sydney Exhibition Centre
www.goodfoodshow.com.au

August

20

ANIC Conference
'Growing for Success'
The Langham, Melbourne
www.anic2009.com

21

ANIC AGM & Board Meeting
The Langham, Melbourne

27

ABA Board Meeting

In A Nutshell



In this issue:



ALMOND
BOARD OF
AUSTRALIA

**New Look Almond Website
New Campaign Launch
Marketing Forum Highlights
Targeting the Middle East
2009 Almond Conference**

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In a Nutshell

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These projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



Call for Nominations

Phil Watters Memorial Award

The Phil Watters memorial award is open to any individual within the almond industry who contributes to almond production through either research and development, adoption of best practice and/or promotion of horticulture to the community.

Nominations are invited from people working in either the private sector or public sector. This includes (but is not limited to) owner-operated farms, corporate farms, private consultancy groups and government research institutions.

To submit nominations or donations, or for information on criteria and eligibility:

Please contact the ABA Office or visit : www.australionalmonds.com.au

Nominations must be received by Friday, 4th September 2009

Edition	Advertising Deadline	Material Deadline
August 2009	15th July 2009	10th February 2009
November 2009	15th October 2009	10th November 2009
February 2010	15th January 2010	10th February 2010
May 2010	15th April 2010	10th May 2010

Australian Almond Conference 2009

Coming out of Our Shell

Coming Out of Our Shell!



**Australian Almond
Conference 2009**

The Almond Board of Australia is pleased to present this year's Australian Almond Conference, being held 28th to 30th October 2009 at the award winning Novotel Barossa Valley Resort in South Australia.

This conference is the premier event for the Australian Almond Industry, bringing together representatives all facets of the industry, including growers, processors, marketers, researchers, nurseries and industry suppliers.

Last year's event 'We're Blossoming!' attracted more than 200 delegates, with over 20 presentations and exhibitions from a broad range of industry service providers.

Sponsorship opportunities are now open, enabling organisations and individuals to contribute to the success of the event, whilst benefiting from a high degree of visibility for their products and services and valuable networking opportunities.

Download a copy of the Sponsorship Prospectus from the ABA website www.australionalmonds.com.au, or contact the ABA office to have a copy posted to you. The prospectus details options of a broad range of sponsorship options. Sponsorship of this major event offers lasting recognition and direct exposure at the highest level to an audience encompassing the Australian almond industry.

For more information please contact Jo Ireland, Communications Coordinator at the Almond Board of Australia office on +61 8 8582 2055 or jireland@australionalmonds.com.au



Key Diary Dates

2009 Australian Almond Conference

Novotel Barossa Valley Resort, South Australia

Social Golf Day & Welcome Function

Wednesday 28 October

Conference Presentations

Thursday 29 October & Friday 30 October

Annual Conference Dinner

Thursday 29 October

Sponsorship Open

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Marketing Forum Highlights

"Making Our Mark"



renowned UK-based importer Liam O’Gorman.

“There is a great opportunity. Consumers are demanding quality and it’s all about giving the customer what they want.

“Everywhere I have sold Australian almonds, they’ve come back for more. The reputation and profile of Australian almonds is growing significantly resulting in increased orders.”

As the Australian almond crop grows from 36,000 tonnes this year to 80,000 tonnes by 2015, the challenge is gaining a bigger share of the global market.

At the ABA’s recent Marketing Forum in Melbourne, delegates were given an update of issues facing this growth, and how the industry intended to benefit from increasing consumption of almonds.

Indian message encouraging

Rajesh Bhatia, a Californian-based Indian almond trader believes the demand for Australian almonds in India will increase significantly in the years ahead.

Mr Bhatia told delegates that our geographic proximity, increasing yield and the Australian almond’s high crack-out contributed to its growing popularity with Indian buyers.

“The quality of Australian almonds allows us to sell the product at a premium,” he said. “Colour and size are the big price drivers in India and that well positions Australian almonds.”

Mr Bhatia told forum delegates that almond consumption was not restricted to wealthy households and that almonds were an integral part of the Indian culture.

*“E*verywhere I have sold Australian almonds, they’ve come back for more.”
Liam O’Gorman, GLM Trading/FRUCOM

He confirmed that several of the traditional festival periods, such as Diwali and Ramadan fall during the Australian season and the consumption of almonds is a key feature in most of them. Unlike western countries where most food is purchased in supermarkets, Mr Bhatia said food distribution was a far more complex in India with most produce purchased from owned and operated street-side stalls.

Well placed to increase market share

The Australian almond industry can grow its market share in Europe by maintaining its focus on supplying high quality produce.” That was the message of

Mr O’Gorman, the importers representative on Frucom - the European Union’s representative body for trade in dried fruit, edible nuts, honey, spices, canned fruits and vegetables and similar foodstuffs.

He said there was a lot to be gained by organizations like the ABA becoming a member of Frucom to establish a presence

and be privy to latest issues facing the most mature market in the world. Mr O’Gorman said managing aflatoxin levels in almonds would be a fact of life in the not-too-distant future for the Australian industry. The issue has caused the American industry a lot of anguish in recent times and had resulted in pasteurization becoming a necessity for US exporters.

He said it was pleasing to hear that the ABA was taking a pro-active approach to the issue and this would ensure the industry was well placed to deal with the inevitable.



Liam O’Gorman, GLM Trading & Rajesh Bhatia, Kush International.



Joseph Ebbage, Sara Grafenauer, Julie Haslett, Carol Rothschild, Lisa Yates & Brenton Woolston

Targeting the Middle East

Australian Almond Export Marketing Program

The Australian almond industry is working to build demand in key global markets including our established markets of Europe and India and the developing markets of the Middle East and Asia. Australia's reputation for reliably supplying quality almonds underpins the ABA's international marketing activities.

Trade shows and promotions provide an ideal platform to promote Australian almonds and our industry, in addition to providing an opportunity to develop export contacts. Each year the ABA coordinates a major Australian almonds promotion in Europe, alternating between the SIAL Food Fair in Paris and the ANUGA Food Fair in Cologne, Germany.

For the first time this year, the ABA promoted Australian almonds at Gulfood, the Middle East's largest food exhibition and one of the world's leading exhibitions covering food, drink, foodservice and hospitality.

Held in Dubai in February 2009, Gulfood recorded an outstanding 16 percent increase in visitor attendance, with more than 45,000 visitors and 3,300 companies exhibiting from 76 countries. Commencing

in 1987, Gulfood is the region's largest and most important industry event of the year, and a strategic platform for buyers and sellers to conduct direct business face to face. The exhibition is a showcase for manufacturers, distributors, and suppliers from around the world, representing all of the key sectors within the food and hospitality trade.

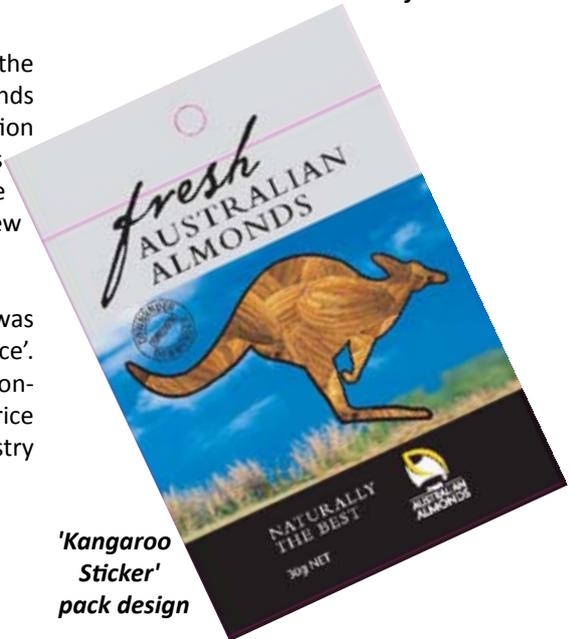
During the four days of the Gulfoods Fair, over 150 nut traders made inquiries about Australian almonds, and all of these contacts have been added to the ABA's export database for future communications.

A significant majority of visitors to the ABA's stand were not aware that almonds are grown in Australia. The reaction from Australian almond tastings was extremely positive, with almost all trade visitors enjoying the taste of our "new season" almonds.

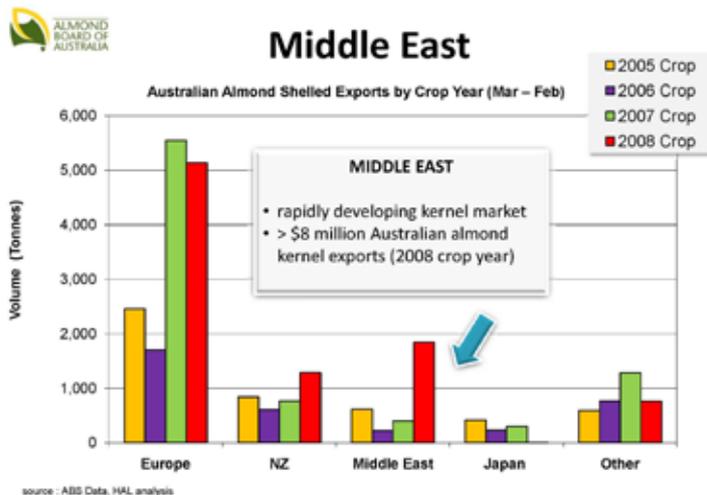
One key insight from this promotion was Gulf traders' keen interest in 'choice'. Buyers clearly expressed, verbally and non-verbally, an interest in understanding a price competitive, export-ready almond industry that offered them additional choice.



Above and bottom: Joseph Ebbage chats to trade stand visitors at Gulfood 2009



'Kangaroo Sticker' pack design



23 - 26 February 2009 | Gulfood 2009 - The 14th Gulf Food, Hotel and Equipment Exhibition and Salon Culinaire

Dubai International Convention and Exhibition Centre and **NEW** Airport Expo Dubai

New Campaign Launch

2009/10 Marketing Creative

A clever series of marketing images, including a short, sexy dress made out of almonds will be used this year to encourage more people to eat Australian almonds.

The Almond Board of Australia unveiled its new awareness campaign at their third annual marketing forum in Melbourne last month.

“The sexy little almond dress says it all really,” she said. “You can look and feel great by adding almonds to your diet.”

ABA Chief Executive Officer Julie Haslett said the underlying message that a handful of almonds a day was good for your heart, your waist line as well as tasting great would be portrayed through the images.

“Our almonds are in strong demand around the world and while domestic consumption has increased, we believe there is potential for more Australians to be eating our home grown almonds more often.”

Seven images highlighting the health benefits, the taste of almonds and their spectacular blossom are designed to encourage more people to eat Australian almonds.

These images will be used at different times of the year to focus on different attributes.

Ms Haslett said the new images would focus on issues like: Enjoying new season Australian almonds, maintaining a healthy heart, using almonds as part of a weight loss program and sharing the beauty of Australia’s almond orchards in blossom

The ABA will invest in magazine advertising to highlight the taste and health benefits of almonds over the next year.

ABA marketing consultant Joseph Ebbage outlined a campaign that will feature in-store promotions and a series of advertisements featuring the new concepts in women’s magazines.

The creator of the concepts, Clare Smith of Admark, said the average person is exposed to 2000 advertising messages every day. Our images are based on penetrating a psyche that deflects most advertising messages and that’s why we work on the philosophy of “saying cat, but showing dog”.



'Sexy Black Dress' creative, and related media clippings from new campaign



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New Look Almond Website

www.australionalmonds.com.au gets a makeover

The Almond Board of Australia is proud to announce that the new look www.australionalmonds.com.au has now been launched. The ABA has been working hard over the past year to create a new, more up to date website.

Overall, the new site is more visually appealing with a sleek appearance, and additional imagery making the site more interesting to look at.

This major upgrade has better integrated the industry and consumer sections of the site, as well as enhancing many aspects of our current site design. A new look and feel has given the site a well deserved makeover, complimenting the Almond Board's current marketing creative and promotional activities and boasts a great new range of features for visitors to experience.

News and upcoming events are now listed on each page and users can even subscribe to specific sections of the website to have e-newsletters, industry information, hints, tips and media releases sent directly to them.

The user-friendly site contains information on the ABA's background, programs, news

and events and other developments within the industry, whilst allowing login access for almond levy payers (growers) to technical and research articles. The industry pages also contain links to many useful water, drought and industry partner pages, as well as industry statistical data and conference information.

New pages added to the site targeting different audiences including media, health professionals, foodservice and manufacturing and almond trade will allow visitors to navigate easily to find information.

'Enjoying Almonds' the new consumer pages contain information including recipes, nutrition and health information, and information on our almond ambassadors. The 'All about Almonds' section answers questions commonly asked by consumers such as "Where are Australian almonds grown?" and "When are almonds harvested?"

Sections tailored to almond trade, foodservice and manufacturing contain information such as key dates for export and domestic trade shows, almond processing and marketing companies within Australia,

information on Almond Marketing Forums, and the launch of the new "Australian Almond Awards".

Media pages within the site include a new 'Royalty Free' photography gallery, where images can be downloaded for use in a range of publications free of charge. Our media releases and health research information feature heavily on these pages.

Dedicated Health Professionals pages have been added to the site, with sections including research papers on heart health, healthy weight and nutrition tables available for download.

Specific shopping and download pages are now available for access from any page of the site. These pages allow downloads of industry information and publications including our 'Industry Booklet', newsletters, strategic plans, constitution and annual reports and purchase of our 'Almond Tins'.

For help or for login access to the website please contact Jo Ireland, Communications Coordinator, on 8582 2055 or email jireland@australionalmonds.com.au.





Nuts for Life

by Lisa Yates
Program Manager
www.nutsforlife.com.au

Consumer PR Update

Activities conducted this quarter include –

Bimonthly food/women's/health media releases

- Secrets to a 'nutty' Christmas – Nov 08
- Know Your Fats – Jan 09
- Nuts key to healthy weight management – Mar 09
- It's in all in a handful (linking nuts with fruits and vegetables) - Apr 09
- Healthy Hearts for Life – Feb 09
- Metabolic Syndrome – Apr 2009
- Diabetes – May 2009

Nut E Bytes

Short snippets of information and story ideas sent via email in Oct 08, Feb 09 and April 09 to media generating 19 replies requesting more information

Nut E News

quarterly email newsletter highlighting new research, tips, recipes and highlighting our resources

Full articles offered for free to magazines

- Network Fitness Magazine submission - a story on metabolic effects of nuts aimed at fitness professionals.
- Healthy and Heartwise – story on weight management and nuts in progress
- Natural Health and Vegetarian Life – story on Metabolic Syndrome and nuts in progress

Media interviews

Lisa Yates was interviewed by the Illawarra Mercury newspaper. She also provided nutrition information on almonds to the Tony Ferguson Chemist Magazine – which goes to customers using their meal replacement products. Recipes were also provided to Healthy and Heartwise magazine

New Resources

16 fact sheets will be developed between April and June 2009 for download from the Nuts for Life website:

An individual fact sheet on each nut type (12 in total) – reviewing the science for each with regard to health (heart health, cholesterol lowering, weight and anything else health related i.e. cancer, antioxidants, gut health etc). Also to include information such as how many nuts in a 30g serve, how to buy and store, basic recipe ideas and tips for using each individual nut.

The top 10 key facts for each nut will be used for a dye cut nut shape postcard.

Plus fact sheets on:

- Nuts and healthy fats
- Nuts and vegetarianism
- Nuts and pregnancy and lactation
- Nuts and children

For more information please contact:

*Lisa Yates, Nuts for Life
www.nutsforlife.com.au
admin@nutsforlife.com.au*

For Registration, Sponsorship & Exhibition Enquiries:

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Breeding Program gets a helping hand

First international PhD student arrives in Australia

Dr Michelle Wirthensohn

Angel Fernandez, a visiting Spanish PhD student, has recently arrived in Australia to work with Dr Michelle Wirthensohn at the University of Adelaide on the Australian Almond Breeding Program.

Angel will be here for two months, conducting research on almond incompatibility, specifically on the reason why some almonds are self-fertile whilst others (most) are not.

One of the techniques he will be using is 3D modelling of the proteins that cause self-incompatibility. He will compare the 'Self-fertile' protein (Sf) with the 'Self-incompatible' proteins (S8 and S23) to see whether there are differences in their shape, which may be the reason for self-fertility in some almonds. Angel will also conduct some molecular studies to try to

find the reason for the differences in these genes.

In early May we expect another visitor, this time from Iran, Professor Majid Rahemi of Shiraz University, who will be on sabbatical leave at the University of Adelaide for nine months.



PhD student Angel Fernandez

Professor Rahemi is also interested in self-incompatibility of almonds and he will be working on Australian cultivars to help identify their incompatibility groups, which to date, are mostly unknown. We will be using the germplasm collection at Simarloo, which is made up of Australian cultivars and kindly maintained by Leroy Sims.

The University is also hoping to start a DNA database for almond DNA fingerprints, using cultivars currently in Australia, helping to identify any unknown trees, but also to be a future resource and benefit for the Australian almond industry. This database will be applicable at international level due to the high number of overseas cultivars in Australia already, but will also be useful for genetic certification of propagated material. Other plant genetic databases already in use around the world include cotton, olives and sorghum.



Media Release

Managing Director announces resignation

John Webster, managing director of Horticulture Australia Limited (HAL), announced his resignation on March 30, 2009 after eight years.

As HAL's inaugural managing director, Mr Webster oversaw the development of a new company following the merger of the Horticulture Research and Development Corporation and the Australian Horticultural Corporation.

In his time as managing director, Mr Webster has steered the company through significant growth with an increase in investments for Australian horticulture from \$49 million in 2000/01 to \$92 million this year. He has also presided over an increase in industry membership from 29 peak industry bodies in 2001 to the current level of 37.

Under Mr Webster's leadership the

company has worked to maximise the return to levy payers through a strong partnership between the company and the industry that it serves.

"I am very proud of what the company and its members have achieved for the industry," Mr Webster said.

"The company and the industry have grown and matured a great deal over the last eight years and I have been privileged to have had a role to play in that. The platform for significant future growth in the industry is in place and HAL's investment in industry programs will help underpin this growth".

Mr Webster paid tribute to the dedication of the Board and staff at HAL. "We have run a very lean organisation as befits any industry body, with a greater percentage of industry funds being invested in industry programs rather than company

costs today than was the case in 2001. This can only occur with an absolutely dedicated staff team and a Board with a clear focus on enhancing operational effectiveness."

HAL chair, Dr Nigel Steele Scott praised the contribution Mr Webster had made to the company. "John's commitment to HAL and to horticulture has been outstanding. The Board congratulates him on everything he has achieved."

"The Board will be moving to find a replacement as a matter of urgency," Dr Steele Scott said.

Mr Webster completed his duties at HAL on April 30th

Media contact:
Dzintra Horder
02 8295 2334 or
dzintra.horder@horticulture.com.au



Herbed Almonds

- | | |
|-------------------------------|----------------------------------|
| 2 cups whole natural almonds | 1/2 teaspoon salt |
| 2 teaspoons dried basil | 1/2 teaspoon ground black pepper |
| 1 1/2 teaspoons garlic powder | 1 egg white |
| 1 teaspoon dried thyme | |
| 1 teaspoon paprika | |

Preheat oven to 160°C. Combine all ingredients except egg white and almonds and mix well. In large bowl whisk egg white until opaque and frothy. Add almonds; toss to coat. Add spice mixture; toss gently to coat evenly. Coat a baking tray with cooking spray. Arrange almonds on baking tray in a single layer. Bake in centre of oven for 15 minutes. Gently toss almonds and arrange again in a single layer. Continue to bake for another 15 minutes; toss gently. Turn off oven. Leave almonds in oven with door ajar for 15 minutes. Remove from oven; cool completely. Store in airtight container for up to 2 weeks.

Makes two cups



THE SERIOUSLY HEALTHY HANDFUL.

www.australionalmonds.com.au

calendar

May

14-16

ABA Promotion

Heart Foundation Conference
Brisbane Convention & Exhibition Centre

24-26

ABA Promotion

General Practitioners Conference & Exhibition, Sydney
Sydney Showground, Olympic Park

24-26

PMA 'Fresh Connections' Conference
Hilton Hotel, Sydney

www.cievents.com.au/events/Freshconnections_Registration

28-30

ABA Promotion

Dietitians Australia Conference
Darwin Convention Centre

June

4

ABA Board Meeting
Hotel Mildura, Victoria

5-8

ABA Promotion

Good Food & Wine Show
Melbourne Exhibition Centre
www.goodfoodshow.com.au

** Launch of Australian Almond Awards
for best home recipes **

July

3-5

ABA Promotion

Good Food & Wine Show
Sydney Exhibition Centre
www.goodfoodshow.com.au

23 - 1 Aug

Amazing Almond Blossom Festival
Willunga, SA

August

17

Almond Blossom Festival
Robinvale, VIC

20

ANIC Conference - 'Growing for Success'
The Langham Hotel, Melbourne
www.anic2009.com

21

ANIC AGM & Board Meeting
The Langham Hotel, Melbourne

October

28-30

Australian Almond Industry Conference
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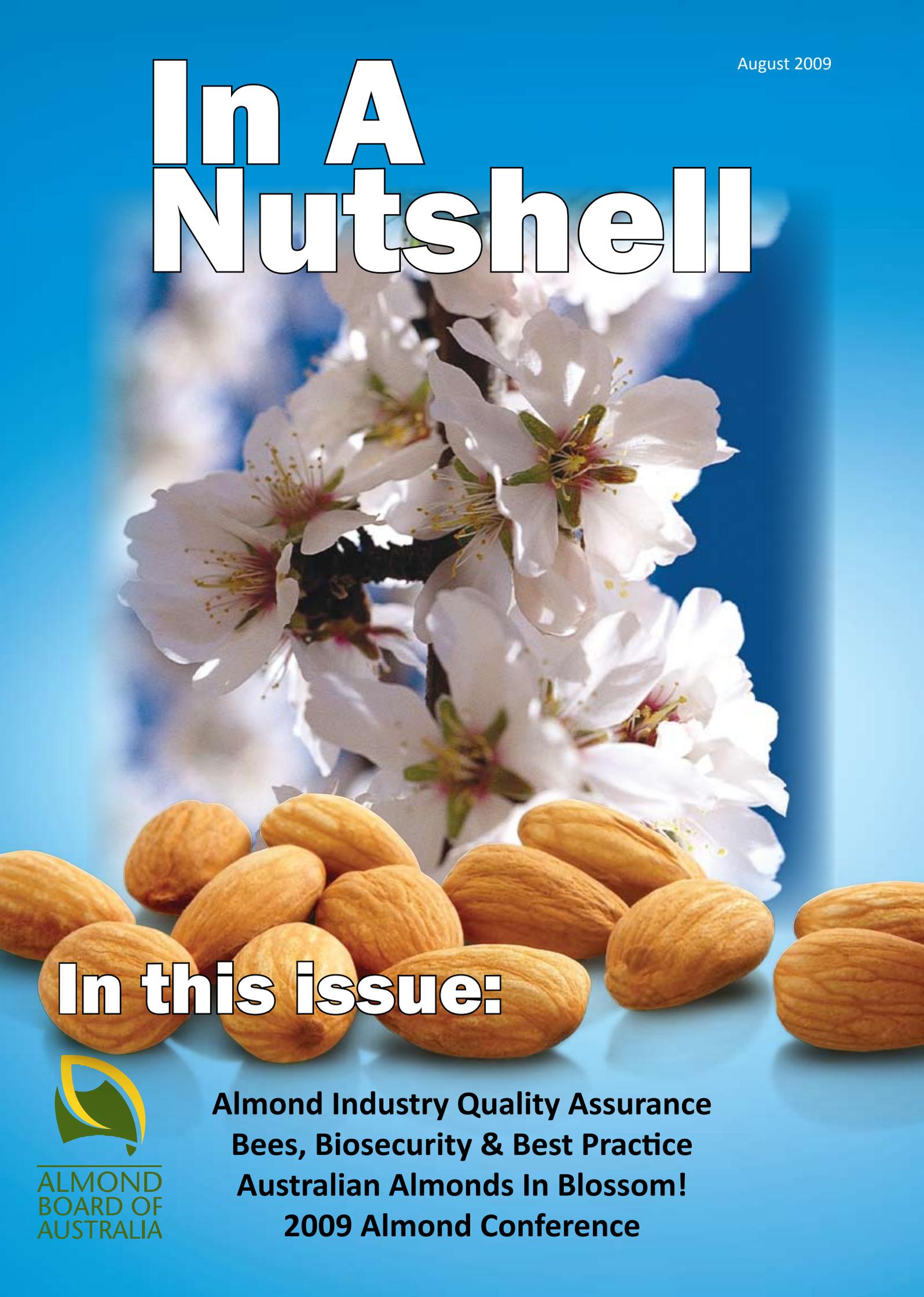
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August 2009

In A Nutshell



In this issue:



ALMOND
BOARD OF
AUSTRALIA

**Almond Industry Quality Assurance
Bees, Biosecurity & Best Practice
Australian Almonds In Blossom!
2009 Almond Conference**

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Know-how for Horticulture™

Edition	Advertising Deadline	Material Deadline
November 2009	15th October 2009	10th November 2009
February 2010	15th January 2010	10th February 2010
May 2010	15th April 2010	10th May 2010
August 2010	15th July 2010	10th August 2010

Quality Assurance

by David Pocock, Rural Solutions SA

It is now nearly 12 years since a HACCP program was first developed for the Almond industry. There have been several different programs available, and they have been widely adopted by the industry.

One of the reasons for the level of success is the manner in which the systems have been developed with an effective partnership and strong commitment operating between growers, shellers, processors and supported in the process by the Almond Board of Australia. Each group has undertaken their role to establish control of the identified hazards in their area of influence.

Given the effectiveness of the approach in the past and the continued watching brief that is needed in food safety, a review has been commissioned to review the current systems used, look at detection levels of known risks and alert the industry to new/perceived risks given the increased size of the industry.

To achieve these objectives the ABA has engaged Rural Solutions SA (David Pocock) to provide a Gap Analysis of current systems and on-farm practices and recommend changes to the industry to meet the changing hazards and risks being faced in Quality Assurance of almonds.

After consulting with processors, crackers and some growers, recommendations will be brought to the ABA to develop a set of agreed QA requirements. Supporting work that is needed will be identified to the industry and presented at the ABA Conference on 29-30 October 2009.

ABA Membership 2009/10

A reminder that ABA membership subscriptions are now overdue



Membership application forms are available from ABA office or www.australionalmonds.com.au/downloads

Further information contact:
 Phone: +61 8 8582 2055
 Email: admin@australionalmonds.com.au

Testimonial to Don Rough

by Paul Martin - Nutwood Orchards

Don Rough would be known to many older almond growers for his contribution to the industry in Australia. For those who didn't know Don, he was a Californian Farm Advisor from Stockton, and connected with UC Davis. Don first visited Australia in 1975, sponsored by the Australian Almond Trust Fund, made up of an agreement between the then Almond Co-op and the SA Dept of Agriculture. He visited twice more over the years sponsored again by Almondco using funds from the Eric Lacey Memorial Trust.

Don gave freely of his time and information when in Australia. On his first visit he made 14 orchard visits and many dinners and BBQ's. He was ably supported by his wife Ernestine (dec), and on his fourth and privately funded trip, he was also accompanied by his daughter Claudia.

At the time of his first visit, our industry was just starting to adopt Californian pollinators and other growing methods, as well as their harvest machinery. Don helped instruct with pruning, fertilising, irrigation etc, but most of all through his philosophy, he taught us what to expect and how to react to things that would appear as our orchards grew. He used many sayings, and one that sticks in my mind was when asked how we would know when our 25 year old Nemaguard orchards would need to be re-planted. He said, "when the orchard outlives the ability of the grower to keep it young". At the time my orchard was just 2-3 years old, and I thought it was just a saying. Some 34 years later, I understand exactly what Don meant, and his words keep coming back to me. One other saying he used was, "There is no replacement for the shadow of the owner in the orchard." Now with our large investor orchards we probably scratch our head as to where that philosophy fits. I am equally sure there are owner growers who fit into that philosophy well and achieve above the average for it.



Don not only gave freely of his time and expertise during his visits to our industry, but he hosted many people in California. His Australian room, decorated with Australian photos and flags, attested to his love of Australia and its people. When my wife and I visited in 1979 (only four years after his first trip to Australia) we were the 83rd and 84th Australians to be invited to his house. His hosting continued on for many years. Don would spend time with his visitors, taking us to many Californian orchards and machinery manufacturers, and not forgetting to send us to places to relax on the weekend such as Lake Tahoe. Don continued to take interest in his Australian contacts and their children. His interest was not just about almonds, but a genuine interest in families and people in general. When he shook my hand on a visit in either country and welcomed me or visa versa, I always had the impression

he was talking to me as a friend. I am sure many of you would agree that Don treated us all as friends.

I consider him to be the father of modern almond growing in Australia. Many of the things we do today, we do because he taught us, or introduced us to them when we visited him in California. We certainly owe Don a great deal for the gift of his expertise to us and for his friendship. To some extent with our CT trial, we have moved on to another level. Don would be happy with that, he would only want us to keep improving and challenging our practices.

Don helped to select varieties he thought would be good for us. He sourced the best buds for them, and continued for many years to send results of variety trials from California. I have a variety assessment trial in my orchard that Don selected and recommended to the industry, so his work is still very current. Don in his retirement continued to work with local variety trials in California, coordinating University variety trials in his area.

Don passed away on July 15th 2009 after a short battle with complications. A memorial service was held in California on August 15th.



PIRSA Thank you

Keith Gibbs - Apiary Inspector

Following a week in the Riverland, inspecting a cross-section of hives on pollination, I would like to thank property owners/managers of the many almond orchards I visited for their co-operation, advice and feedback.

Many provided me with hive placement/orchard maps – most useful in traceback, should any disease be discovered in the near future.

It was disappointing that just prior to my visit, we experienced hot, windy weather, which finished off much of the blossom, preventing many hive inspections. However, it was still a worthwhile exercise, giving me a general direction for follow up work.



By working together in situations such as this, both the apiarists and almond industries in general, reap the benefits.

Keith Gibbs
Apiary Inspector



Campaign Success!

New Seasons Almonds



The 2009 New Season Australian almond campaign during April and May was the first industry promotion that was directly linked to in-store activity, via advertising and in-store point of sale.

The focus of this promotion was to promote the unique taste of fresh almonds as well as to emphasise the Australian grown nature of our almonds.

The point of sale portfolio included A3 and A4 posters, supported by shelf wobblers. Print advertising appeared in the BBC Good Food Magazine, Australian Good Taste, and Women's Health magazines.

Supermarket chain Coles, along with a number of other retail outlets across the country took advantage of the clever imagery featuring a little black dress made out of almonds to promote sales. For retailers who leveraged the campaign, the sales growth was significant. One of the key positives from the New Season campaign within Coles has been the increased baseline sales post-promotion.

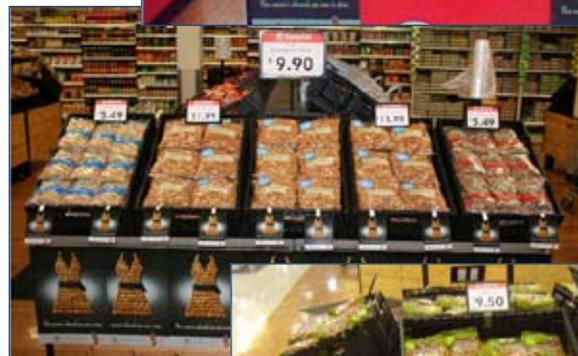
The positive contribution of the New Season promotion has helped drive interest in the Australian almond blossom season.

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Consumer Marketing Update

Exhibitions & Expos

Australian almonds were promoted at a number of shows during May, June and July this year. These events provide personal interaction with consumers and health professionals, to sample Australian almonds, communicate the key health benefits of eating a handful of almonds everyday and grow a database for on-going communication.

Objectives

- Sampling Australian almonds
- Selling and distributing our heart-shaped almond tin
- Using the snack tins as a means of communicating our 'handful of almonds everyday' message
- Giving away almond recipe cards and information brochures
- Communicating the heart health benefits of eating a handful of almonds everyday



Good Food and Wine 2009

The Melbourne Good Food & Wine Show this year included a 'hamper giveaway', one hamper per day containing packs of natural almonds, chocolate and wine. Entrants were asked to leave their name and email address to be contacted and have their prize delivered.

The option was given to receive marketing emails from the ABA of recipes and health information. These names have been added to our email database for future e-blast communications. With an average of approximately 200 entrants per day, a total over 450 entrants opted to receive this information.

Health Professionals Conferences

One of the principal features of the ABA's health professional program is the development of a database of health professionals and the distribution of a free display unit holding 12 almond snack tins.

The focus of the communication at each of the health professional conferences was the role of almonds in lowering LDL cholesterol, as explained in the report: "Lowering LDL cholesterol with Australian almonds".

In all three health professional conferences, the focus of the Australian almond educational program was communicating the role of almonds in lowering LDL cholesterol and thereby reducing the risk of heart disease, and the role of almonds in achieving healthy weight. Both these issues had fact sheets to explain these claims.

Heart Foundation Conference

The Heart Foundation Conference was held in Brisbane from May 14-16. The conference attracted over 550 delegates who all shared a professional interest in heart health.

Delegates were offered a free sample of almonds in one of our heart-shaped snack tins. Delegates who had medical practices were also offered a free box of almond snack tins to be sent to their practice, and given to their patients and clients.

One of the key insights from the Heart Foundation Conference was the growing emphasis on preventative health with national health policy. The Australian Federal Government has established a Preventative Health Taskforce that will report to the Minister in June, 2009. The health benefits of eating a handful of almonds everyday plays an important role in preventing major health issues such as high levels of LDL cholesterol, heart disease, and overweight and obesity.

GPCE Sydney

GPCE Sydney was held on May 21-23. This is the largest GP conference in Australia with over 1700 delegates.

There is significant value in presenting our educational material at these GP conferences as they have the time to listen to our key messages. It is unlikely that they would spend such time



reading about the health benefits of almonds during their work time in a busy general medical practice.

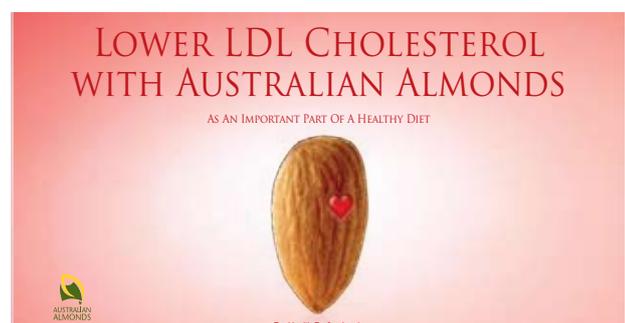
This program aims to 'influence the influencer'. The value of this activity was highlighted during the Good Food and Wine Shows when several, separate visitors to our stand indicated that they had been given one of our snack tins from their GP.

Dietitians Australia Conference

The national conference for the Dietitians Association of Australia (DAA) was held in Darwin from May 28-30. There were over 600 delegates at this conference.

Several experienced dietitians shared their perspective that nuts and almonds are not a recommended inclusion in their weight loss regimes. Several dietitians even shared that they actually recommended that their clients specifically avoid eating nuts when trying to lose weight.

These discussions highlighted the need for further work to articulate and communicate the value of a handful of almonds in a diet designed to lose weight. There is still significant confusion over the role of fat in a weight loss diet. This issue will be an important part of the 'Educating Health Professionals' project over the next 12 months.





Australian Almond Conference 2009

28 October - 30 October 2009 • Novotel Barossa Valley Resort

The Almond Board of Australia is pleased to present the 2009 Almond Industry Conference, being held Wednesday, 28th October to Friday, 30th October.

This year's conference will be held at the award winning Novotel Barossa Valley Resort in Rowland Flat, South Australia. This annual conference is the premier event for the Australian almond industry, bringing together approximately 200 delegates from all facets of the Australian almond industry including growers, processors, marketers, researchers, nurseries and other industry suppliers.

The Novotel Barossa Valley Resort is located in the heart of the Barossa, perched high on a hill, overlooking the rolling hills of the valley. Set in a natural amphitheatre, the Novotel Barossa Valley Resort boasts panoramic views across the Barossa Ranges and Jacobs Creek vineyards. From here you can explore Australia's most famous wine region, visit a boutique cellar door or take a behind the scenes tour, experience a Maggie Beer cooking demonstration, or sample the epicurean delights of the Barossa Farmers' Market.

To register for this year's Australian Almond Conference please contact the ABA office for a registration form, or download the interactive form available via the Almond Board of Australia website at www.australionalmonds.com.au/industry/almond-conference

Featured Speaker

Tom Rooney



CEO and founder of Waterfind

Tom Rooney has been involved with the water trading industry since 1989. He grew up on his family's property in South Australia's Riverland region. In his early 20's, Tom owned and managed a citrus farm, further developing his affinity with river systems and their environments.

Tom's industry knowledge, practical experience and empathy with the rural community were instrumental in the initial development and continual enhancements of Waterfind's trading systems. Tom's automated Waterfind trading system was recognised in 2006 when it won the Australian Water Association sponsored 'Innovation Award'.

Tom has been instrumental in maturing Australia's water market, educating irrigators, facilitating trades and creating market transparency and liquidity. He is an active and strategic contributor to water policy discussions at both national and state levels, and often presents key addresses at conferences on the issues surrounding water trading in Australia.

Tom is also founder and now a committee member of the Waterfind Environment Fund; a not for profit association dedicated to improving the health of Australian River Systems.

Proposed Program

Wednesday, October 28th

- Social Golf Day
- Welcome Function

Thursday, October 29th

- Registration & Trade Exhibition
- ABA Annual General Meeting
- Official Conference Opening
- Keynote Addresses:
 - International Overview
 - Almond Marketing Highlights
 - Food Safety & Quality
- Sponsor's Drinks & Annual Conference Dinner

Friday, October 30th

- Breakfast Keynote Speaker
- Annual Levy Payers Meeting
- Keynote Addresses:
 - Pest & Diseases
 - Water & Irrigation
 - Nutrition

The Conference organisers reserve the right to amend the program at any time if circumstances change following the printing of this newsletter. Please visit www.australionalmonds.com.au for latest program details leading up to the conference.

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Have you registered?

Here are a few reasons why you should...

- Engage in discussion and hear varied viewpoints on the industry and its future
- Be exposed to valuable new contacts and learn from other industry colleagues
- Hear from industry experts in their respective fields
- **Trade Exhibition** - Delegates will be able to explore innovative products and services, ideas and solutions in an exhibition closely integrated with the conference.
- **Golf Day** - Enjoy a memorable day of golf with fellow delegates incorporating 'Nearest Pin' and 'Long Drive' competitions in an ambrose style competition.
- **Welcome Reception** - held in the Shiraz room of the Novotel Barossa Valley Resort, overlooking the beautiful Barossa Valley wine region.
- **Conference Dinner** - a great opportunity to network with industry professionals and enjoy an evening of fine food, wine and entertainment.



Entertainment - The Amazing Nigel

Nigel is a multi-talented entertainer who enthralles audiences with magic and comedy. He's truly one of Australia's best value for money entertainers.

It's Nigel's amazing ability to use his memory that sets him apart. This unique combination of interactive magic, comedy and memory must be seen in action

to be believed. It's sure to leave your audience intrigued and entertained.

Nigel's stage show is a wonderful mix of stand up comedy and magic. During his show the audience will witness Nigel's amazing ability to recall the names of up to 300 people after only a brief introduction. He's currently one of only a handful of people in Australia to demonstrate this ability, and the only one who has adapted it into a highly entertaining show.

The Almond Board of Australia gratefully acknowledges 2009 conference sponsors

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BOOST PROFITS WITH FOLIAR NUTRITION

FOLIAR nutrition is a powerful management tool for growers that can increase yields dramatically and boost growers' net profits, according to Haifa Chemicals Australia (HCA) Southern Agronomist Shaul Gilan.

Shaul said foliar nutrition can perform three vital functions for producers:

- Complementing soil nutrition.
- Correcting nutrient deficiencies.
- Boosting crops at critical plant development stages.

Shaul said in situations where plants may not be getting enough nutrients from soils, foliar application of nutrients can help complete plant nutrition and prevent yield-reducing deficiencies.

"Sometimes plants just don't get enough nutrients from the soil. This can be the result of soil conditions that disturb root absorption, or, simply, inadequate fertilisation," he said.

"Temperature, moisture, aeration, mechanical status and other factors, including soil diseases or nematodes, can affect the availability of plant nutrients for root uptake."

Shaul said because nutrient uptake through leaves was so much faster than through the roots, foliar sprays were also highly



Shaul Gilan, Southern Agronomist for Haifa Chemicals Australia (HCA).

recommended when prompt correction of nutrient deficiencies was required.

He said in addition to curing poor growing conditions, correct timing and application of foliar nutrition could also boost crop growth and yields.

"It is well-known that certain plant development stages are of higher importance in determining final yields. Foliar application during these critical stages will dramatically increase yields and improve yield quality.

Shaul said the rapid and efficient uptake of foliar nutrients also meant applications were highly cost-effective.

"Uptake starts within minutes of application

and can continue for hours – even days thereafter. Uptake efficiency of foliar applied nutrients can exceed 70pc."

HCA offers a selection of chloride-free, fully water-soluble foliar fertilisers for producers, including:

- Haifa-Bonus npK - foliar potassium nitrate enriched with macro and/or micronutrients, and with special adjuvants for prolonged action.
- Poly-Feed Foliar NPK - enriched with micronutrients and specially designed to enhance crop performance during specific growth stages.
- Magnisal - easy to use, water-soluble magnesium nitrate with 16pc MgO for more efficient magnesium nutrition.
- Multi-MAP (Mono-Ammonium Phosphate)
- Multi-MKP (Mono-Potassium Phosphate)



Shaul said numerous field trials, demonstration plots and commercial-scale applications in many crops had proven the benefits of foliar sprays with Haifa products.

For further information and assistance to growers for successful foliar fertilisation, contact HCA on (03) 9583 4691.

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Australian Almonds In Blossom!

Record Sales of Australian Almonds

With the almond blossom season well underway, the Australian almond industry continues to bloom with the latest figures revealing 60 per cent growth in the value of almond exports this year.

This increase in the global demand for almonds has strongly contributed to the growth of Australia's horticultural exports. Almonds are now Australia's third largest horticultural export worth \$120 million in 2008-2009, up from \$75 million in the previous year.

Currently, 60 per cent of the Australian almond crop is exported to more than 40 countries around the world. Strong export demand for Australia's almonds is being driven by developing countries, with exports to the Middle East growing seven-fold and more than doubling in India, Australia's largest almond export destination.

Domestic consumption of almonds has also increased in the last year. More

than 92 per cent of almonds sold in Australia today are grown and produced in Australia. Australians are eating more almonds, with domestic consumption having increased by over 10 per cent in the last 12 months.

World almond consumption has been growing at an average rate of nine per cent per annum over the last 10 years. Assuming a reduced annual growth rate of five per cent, the world's demand for almonds is expected to exceed available supply within three years. The Australian almond industry needs to be ready for this next surge in demand.

California has also experienced record almond sales for the third consecutive year:

"2008/09 Almond Shipments Shatter Prior Year Records"

Global demand for California Almonds soared to new heights in crop year 2008/09, bucking the trend of the global economic downturn as consumers and food manufacturers alike demonstrated their unwavering, growing desire for tasty, wholesome almonds. According to the July 2009 Almond Board Position Report issued August 11, 1.39 billion pounds of almonds were shipped worldwide during the twelve-month crop year ending July 31, 2009, marking the third consecutive year of record shipments. This reflects a 10% increase over 2007/08, and exceeds the entire production volume of 1.38 billion pounds in 2007/08."

from Almond Board of California – Global Update, August 2009

Promotional Campaign

The Almond Board of Australia has launched an extensive marketing and media campaign to celebrate the "Australian Almond Blossom Season" occurring throughout our regional growing areas in August.

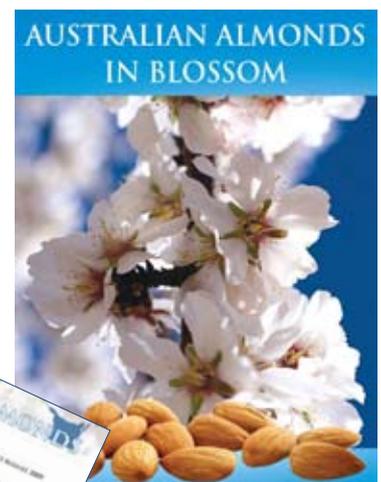
Key objectives during this two-month period include:

- increasing sales and consumption of Australian almonds
- raising awareness of the almond blossom season
- enhancing the Australian almond industry profile
- increasing public knowledge about the almond industry

Key activities include:

- New website home page to promote "Australian Almonds in Blossom"
- Sponsorship and support for regional Almond Blossom Festivals: Willunga Almond Blossom Festival (South Australia) and Mallee Almond Blossom Festival (Victoria)

- Nationwide in-store promotion celebrating Australian Almonds in Blossom, utilising a range of Point of Sale materials.
- Full page advertisements in August issues of:
 - BBC Good Food Magazine
 - Australian Superfoods Magazine
 - Australian Good Taste Magazine
- Almond Blossom Video
- News Release for TV
- News Bulletins





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Pollination Australia

Pollination R&D Update

A Five Year Pollination R&D Plan has been developed, setting direction for future activities and expenditure. Funding contributions in excess of \$380,000 have been confirmed for the 2009/10 Pollination R&D program. Three pollination R&D projects were contracted in 2008/09:

1. Simulation Exercise for Pollination Industries (with Plant Health Australia)

This project is now well underway, with the first workshop held in Melbourne on 10 June. This exercise brought together representatives from state and federal government, spanning both animal and plant sectors, in addition to representatives from PHA, AHA and industry. A Varroa incursion was simulated, to explore the current mechanisms for managing such an incursion. The day highlighted potential gaps in the current management system, which were constructively and positively explored by all parties present. This workshop focussed purely on an eradication phase in response to a varroa incursion. A second workshop will take place on 19 August to explore long-term management strategies.

2. Future Surveillance Needs for Bee Biosecurity (with CSIRO)

A workshop was held in Canberra on 16 June with key stakeholders from industry, CSIRO, DAFF and state Departments of Primary Industry. The aim of the workshop was to discuss and assess options for on-going surveillance for bee pest and disease incursions, and assess the potential costs and benefits associated with each.

3. Pollination Aware: Its Importance to Australia (with Dr Rob Keogh, Strategen)

This project will undertake development of a pollination manual that provides a central point of information about pollination requirements and capacity for some 60 different crops, including all horticulture commodities and a range of grains products. The manual is intended to serve as a resource for subsequent use in a number of other projects and exercises aimed at optimal delivery of national pollination requirements, and options for their most effective maintenance in the event of incursion of bee pests or diseases.

Proposed Changes to the Emergency Plant Pest Response Deed (EPPRD)

At a meeting of PHA members in May 2009, general support was indicated for the inclusion of bee pests affecting pollination-reliant industries in the EPPRD. This is an important change for pollination dependent industries as it will mean that an incursion affecting honeybees will trigger a response under the Plant Deed, rather than the Animal Deed, as is currently the case. As a result, "Affected" pollination dependent industries will then be included in the consultation and decision making process, in addition to cost sharing for a response, with other benefits like owner reimbursement being applicable for any consequent losses being incurred. Pollination reliant industries will also be involved in the categorisation process for each pest affecting honeybees, which will then determine "Affected" parties and the relevant cost sharing arrangements for each individual pest incursion. It is anticipated that a formal proposal will be put to PHA members at the next EPPRD Signatories meeting in October 2009.



Bees, Biosecurity & Best Practice



farmbiosecurity



Good farm biosecurity protects your crops and livelihood from the threat of exotic plant pests and diseases. Farm biosecurity is everyone's responsibility.

As the owner or manager of an orchard, you need to ensure that every person working or coming onto your property is well informed of your active biosecurity measures.

Farm hygiene is critical to maintaining effective farm biosecurity. Ensuring that people, vehicles, machinery and equipment do not carry exotic pests or diseases onto your property, will offer protection from the expense and potential devastation of an exotic pest incursion. Simple steps can improve biosecurity on your orchard, such as:

- Monitoring people movement by having a visitor register, and checking that all visitors clothing and footwear are free of soil or plant matter before entering or leaving the property.
- Keeping farm vehicles free of soil, grass and weed seeds and insects, especially after visiting other properties, and requesting that all contractors clean their equipment before entering your farm.
- Regularly cleaning all tools and equipment, including secateurs, pruning saws, grafting knives, pallets and palecons, boxes, bags, trimmer, soil augers, tractor implements, harvest machinery and contract machinery, preferably with an antiseptic solution or detergent.
- Having designated parking areas allow you to contain possible entry of new pests away from your orchards and storage facilities. Parking areas allow you to inspect tyres, grills, floors, equipment, and boots if required for obvious signs of pests. Biosecurity signage situated in the parking area or at the entrance of the property will remind visitors of the risk of spreading pests and alert them to your biosecurity practices.

The pollination services used by orchardists brings a contractor with

special biosecurity considerations onto your property. Minimising the risk of new pest introductions to the Australian honey bee industry through good hive biosecurity practices provides benefits to beekeepers and growers, and protects the honey and pollination-dependant industries.

The Almond Board of Australia is keen to highlight the importance of good hive biosecurity practices to almond growers. There are a number of bee and hive pests that are absent from Australia, but would have serious impacts on the honey bee industry and the pollination services bees provide if they were introduced. Many of these pests are prevalent in neighbouring countries and pose a very real threat to the productivity of Australian almond industry.

Bee and hive threats

The Australian honey bee industry currently faces several key biosecurity threats. The highest priority is considered to be Varroa mite (*Varroa destructor* and *Varroa jacobsoni*), which attacks Asian and European honey bees in Papua New Guinea and New Zealand.

Varroa mites are external parasites that feed on both adult and broodbees (pupua). The mites are carried into

hives on bees, where they leave the bee and invade brood cells. Their movement between and throughout the hive spreads any pathogens that they carry. Introduction of the mites into a hive results in individual bee deformity and premature death, leading to total colony death.

The mites are the size of a pinhead and hard to see with the naked eye. Detection of the mite is most easily observed through other signs of their presence, such as swarming or robbing bees and unusual bee behaviour.

Varroa mite is present in most bee-keeping countries. It arrived in New Zealand in 2000 and has already had a significant economic impact. The potential impact on the Australian plant industries has been estimated at up to \$50 million per year. There would also be additional effects on honey and pollination service industries.

Asian honey bees are exotic pests and, in addition to possibly carrying the Varroa mite to Australia, is an aggressive competitor of the European honey bee. Asian honey bees would have a major impact if they were to become established.



Varroa jacobsoni Oudemans - Infestation - Lilia De Guzman, Bugwood.org

Bees, Biosecurity & Best Practice

Other threats not currently in Australia include:

- Tracheal mite: Infestations result in sick bees that do not work as hard or live as long as healthy bees. The mite spreads from bee to bee and hive to hive and is difficult to detect.
- *Tropilaelaps clarae* mite: This parasite causes brood death or shortened life span for any bee attacked.

Good biosecurity measures also reduce the impact of pests already established in Australia, such as the Small Hive Beetle, American Foulbrood and the European Foulbrood of honey bees.

What is the best protection for my orchard?

There are a number of things you can do to improve your orchard biosecurity and to help safeguard Australia's almond and honeybee industries.

Most importantly, if you see any unusual pests or bee activity you should call the Emergency Animal Disease Watch Hotline on 1800 675 888.

As a almond producer, you should ask your hive provider to:

- Check the health of any newly purchased bees, including asking for a vendor declaration of health status.
- Specifically check for Varroa mite, Tracheal mite and Asian honey bee.
- Limit the movement of hives, as this stresses bees, making them susceptible to disease.

- Avoid placing hives in proximity of rubbish tips or where birds are fed honey.
- Avoid the placement of hives near abandoned hives or abandoned orchards.
- Avoid the contact of livestock with the hives.
- Regularly inspect bees for unusual behaviour.
- Isolate captured swarms for six months to ensure their health and that they are free from pests.

Working together, almond producers and hive providers should:

- Ensure all orchard and hive equipment is cleaned between uses.
- Wash and disinfect hands when moving between hives.
- Ensure boots and clothing are free from plant material, soil, insects and other pests before entering and leaving orchards or handling hives.
- Minimise the number of people that visit hives.
- Prevent vehicles from driving in close proximity of the hives.
- Secure honey stores and equipment so robbing bees cannot gain access.
- Report any unexplained decline in bee numbers, crawling bees near hive entrances or any unusual bee behaviour.
- Report anything unusual to the Emergency Animal Disease Watch Hotline on 1800 675 888.

Record keeping is an important aspect of good biosecurity practices, so requesting and recording information from your hive

provider on the previous locations of your hives and their inspection program. Asking for this information shows that biosecurity is important to you and will help track and minimise any pest spread should there be a new pest incursion.

The Almond Board of Australia encourages all Australian almond producers to secure their orchards and their livelihoods against biosecurity threats. Biosecurity incidents do not happen in isolation. Pest incursions affect neighbours, communities, regions and whole industries. By implementing these simple farm hygiene practices into our daily processes, we go a long way to protecting market access and the long-term viability of all Australian almond growers.

More information

The Australian Honey Bee Industry Council (AHBIC), as the peak honey bee industry body, has a focus on protecting beekeepers and their hives through sound biosecurity practices. Visit www.honeybee.org.au or call 02 9221 0911.

For more information on biosecurity and a range of tools to help you secure your farm and secure your future, visit www.farmbiosecurity.com.au.

If you see any unusual signs of pests in your bees call the Emergency Animal Disease Watch Hotline on 1800 675 888.
If you spot anything unusual in your orchards, call the Emergency Plant Pest Hotline on 1800 084 881.



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Buried Drip

by Paul Martin - Nutwood Orchards

We all want the best of both worlds. When it comes to irrigation and drip systems we as growers are all the same. We want cheap and quick, and we want effective and long lasting. Unfortunately the system that gives us all those objectives has not yet been developed.

Almond growers more than most irrigators have a reason they want the drip tube out of the way. It needs to be out of the way during harvest, so we can mow or flail the weeds, and blow the nuts through the tree row without any obstacles. Many growers are doing that fairly effectively. Others have struck problems with vermin damage on the drip, both by furry animals and flocks of birds. Sometimes the damage can result in the loss of hundreds of metres of drip line in a single day, as I experienced with my first above ground drip block when a flock of Major Mitchells attacked it.

To bury or not to bury?

It was thought that buried drip answered all the problems. However, in more recent times, we have learnt how aggressive almond roots can be and many orchards have suffered from root intrusion into the buried drip. Can this be beaten? Many have tried, few have succeeded. The obvious answer is a Treflan impregnated drip system such as the Toro system. The down side is that Toro, to my knowledge do not make a high cut off (HCNL), or high head hold system that prevents drainage on slopes, and the output from their inline drippers is often less than we require. This high cut off is necessary for pulse drip to prevent the drowning of trees at the bottom of our mallee slopes. Toro holds the patent on herbicide impregnated dripper, but this may soon expire or be beaten with technology.

In the Industry CT trial we have a drip system that incorporates the best of both worlds. It is buried, but a micro tube takes the water to the surface. This tube is too small to hinder mowers or harvest equipment. Why is this system not more widely used? It is up to 100% more expensive than inline drip and more if the drippers are not assembled in a low labour country. The installation is also more difficult. So cost could be the major single answer.

In 2007 I saw an ad for grants for innovation and efficiency in Agriculture under the banner of "Advancing Agricultural Industries, AgFund". It was run by the Commonwealth Dept of Agriculture, Fish and Forestry. I applied and was successful in gaining some funds to help design, build and trial a ripper that could handle poly line with button drippers and micro tube attached. The CT trial, as I understand it, used a trench digger to make a trench, then attached the drippers onto the drip line in the trench. I was able to buy pre punched 19mm tube and pre assembled button drippers 3 Ltr/hr PC high CNL (high head holding) with a 150mm micro tube riser. I engaged Nikolai Engineering of Loxton because of their experience in agriculture to help with the design and to make the unit. In September 2008 the first trial took place. To my amazement, the drip line with the button drippers etc, fed through the machine into a twin steel wheel behind the ripper and lay in the ground with the micro riser sitting up. It was so simple but effective.

The next issue was to back fill the ripped area. That proved to be more problematic. We developed a separate back filler and mounted it offside on the front end load so we could easily see what we were doing. It worked well in very dry soil but not so well in cloddy or damp soil. We have added press wheels to the ripper to help keep the micro tube up in the installation and back filling process.

The project was professionally assed by Trevor Sluggett from AgriExchange and he encouraged me to continue the trial for another year. In 2008 I installed 4 Ha and this year another 2 Ha. We will continue to monitor the results.

I see the advantages with buried button drip and micro riser as requiring much less chemical application to keep the roots out compared to buried inline drip. It requires a clean with Hydrogen Peroxide a couple of times a year and regular flushing. I also think the lower vermin damage will bring the cost into line over time. I am yet to assess wether kangaroos will pull out the micro risers. I think that test is not far away.





Almond Trailblazer Mix

2 cups whole natural almonds, roasted

1 cup raisins

1/2 cup sultanas

1 cup sunflower kernels

1/2 cup dried cranberries

2 tablespoons soy sauce

1/4 teaspoon ground ginger

Preheat oven to 150°C. In a large bowl, combine almonds and sunflower kernels. Sprinkle with soy sauce and ginger. Toss to coat evenly; spread on baking tray. Bake for 15 minutes, stirring once or twice. Cool completely. Add raisins, sultanas and dried cranberries, toss. Store in airtight container.

Makes five cups



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calendar

September

7-10

Fine Food Exhibition
Sydney Convention & Exhibition Centre
www.foodaustralia.com.au

8-9

ABA Board & IAC Meetings
Old Adelaide Inn, North Adelaide

29

Plant Nutrition IPM MasterClass
Mildura Working Man's Club

October

10-14

ANUGA Food Fair
Cologne, Germany
www.anuga.com

28-30

Australian Almond Industry Conference
Novotel Barossa Valley Resort
www.australionalmonds.com.au



AUSTRALIAN
ALMOND
MARKETING
FORUM

Date:

Thursday
18th March 2010

Time:

9.30am start

Venue:

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Preston VIC 3072

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To register your interest, go to www.australionalmonds.com.au/forum and follow the prompts.



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ALMOND
BOARD OF
AUSTRALIA

In A Nutshell



In this issue:

New ABA Chairman Appointed

Almond Conference Wrap Up

Phil Watters Award Winner Announced

Deficit Irrigation in Almonds



**ALMOND
BOARD OF
AUSTRALIA**

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Please Note

The Almond Board of Australia Office will be closed from:

Thursday 24th December
and re-opens on
Monday 4th January

Edition	Advertising Deadline	Material Deadline
February	15th January	10th February
May	15th April	10th May
August	15th July	10th August
November	15th October	10th November

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development. In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties. Please contact the Almond Board of Australia for current membership fees and inclusions.

Advertising/Editorial

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These projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



Know-how for Horticulture®

New ABA Chairman

Riverland almond grower and regional representative Brendan Sidhu was appointed as Chairman of the Almond Board of Australia during the Australian Almond Conference, 28 - 30 October 2009.

Brendan Sidhu takes over from outgoing chairman Brenton Woolston, who held the position for the previous 2 years and remains as a Director on the Board.

Brendan became involved in the almond industry in 1983 and has been actively involved as managing director of Waikerie-based Jubilee Almonds since 1991.

"I have seen the industry grow up and mature into a position envied by most other horticultural enterprises. I can make a good contribution to the ABA from a grower's perspective and I will do my best to represent all growers in all regions," Mr Sidhu said.

Brendan Sidhu has a sound knowledge of horticultural best practice and understands the importance of communication to growers and ABA members. He has completed an Advanced Diploma in Horticulture and is a graduate of the Australian Institute of Company Directors.

ABA Director and Sunraysia regional representative, Neale Bennett was appointed Deputy Chairman. The ABA also welcomed three new Board members including Adelaide almond grower Domenic Cavallaro, Griffith almond grower Denis Dinicola and horticultural manager of Select Harvests, Tim Millen.

The ABA farewelled two long-standing Board members at its AGM: Stephen Lynch and Jim Pierson.

The new committee will meet for the first time in February 2010.

Almond Board of Australia Board Members

Director	Position
Brendan Sidhu	Chairman & Riverland Grower Representative
Neale Bennett	Deputy Chair & Sunraysia Grower Representative
Domenic Cavallaro	Adelaide Grower Representative
Grant Birrell	Marketing Representative
Tim Millen	Marketing Representative
Brenton Woolston	Marketing Representative
Tony Spiers	Riverland Grower Representative
Denis Dinicola	Riverina Grower Representative
Vacant	Sunraysia Grower Representative

Deficit Irrigation in Almonds

by Dr Karl Sommer, DPI Victoria

Much remains to be learnt about the impact of water on almond production in Australia, so a research project was established in winter 2009, to build the industry's knowledge about the role of water deficits on yield and nut quality.

To provide the necessary data, a trial has been established at Lake Powell near Robinvale in Victoria with funding from the Department of Primary Industries Victoria (DPI), Australian Almond Industry levies and Horticulture Australia Limited (HAL).

The site has five levels of irrigation applied – a control (approximately 12 ML/Ha), three levels of deficit irrigation (55, 70 and 85 per cent) and a higher irrigation level (120 per cent).

The water deficits are being applied in two different patterns – regulated deficit irrigation, where the stress is biased

towards pre-harvest, and sustained deficit irrigation, where deficits are applied throughout the irrigation cycle.

Work to date has involved the installation of the irrigation infrastructure such as flow meters, fertigation tanks, automatic controls and logging capacitance probes.

During the current season, deficit irrigation is being applied to the site and its impact on tree growth and plant/soil water status will be monitored. Yield and nut quality will be assessed post-harvest.

There will be an opportunity to inspect the trial site at a field day to be held in early 2010.

For more information contact:

Ben Brown

Industry Liaison Manager

Almond Board of Australia

bbrown@australianalmonds.com.au



Control unit in front and fertigation tank in background (Lake Powell)



Installation of irrigation infrastructure at Lake Powell trial site



Flow meters for 8 irrigation treatments at Lake Powell

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100% Compliance

National Residue Survey

In 2008, the ABA initiated an almond industry pesticide residue monitoring program with the National Residue Survey (NRS). The NRS currently tests for residues of agricultural and veterinary chemicals and environmental contaminants in 22 animal and 26 plant commodities including four other horticultural products.

A total of 64 almond samples were collected and tested for a broad range of insecticides, fungicides, herbicides, fumigants and metals.

Samples were collected from three processing plants, Almondco Australia, Riverland Almonds and Select Harvests. In cooperation with the ABA and the almond processing plants, NRS organises two sampling rounds per year, in January and April.

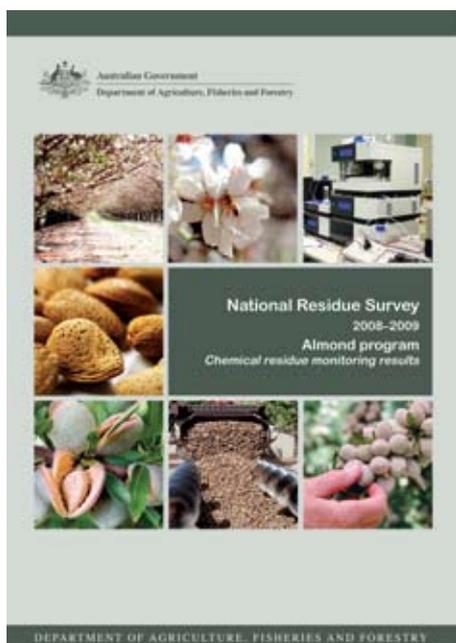
Approximately 1kg of kernel is collected by QA staff at the processing plant in accordance with NRS procedures and protocols. Results are sent electronically from the laboratory to the NRS, where the data is collated and compiled for industry and government use.

Samples are tested against an agreed chemical screen that is developed in consultation with ABA. The chemicals included in the chemical screen are those that may be used in almond production in Australia, as well as those that may be important in terms of international trade.

The residue testing results for all chemical screens indicate 100% compliance with Australian Standards.

These results demonstrate to export markets appropriate use of agricultural chemicals used in accordance with good agricultural practice. Maintaining this level of compliance is of ultimate importance in protecting our international reputation as a safe, quality almond supplier.

Further details on the testing program and results can be found in the NRS's 2008-2009 Almond Program Report or by contacting the Almond Board of Australia Office on 08 85822 055 or email admin@australionalmonds.com.au



Levels To Increase

EU Increases Aflatoxin Levels

On October 15, the EU voted to align maximum aflatoxin levels for tree nuts with international standards. This change is expected to take effect in February 2010.

After 12 years of unceasing efforts, the International Nut Council (INC) position regarding the sampling plan and maximum levels for total aflatoxins for almonds, hazelnuts and pistachios, has been accepted for EU implementation. This success confirms the effectiveness of the nut industry's vigorous, consistent and continuous efforts, under the leadership of Pino Calcagni, Chairman of the INC Scientific and Government Affairs Committee, and Julie Adams, Vice-Chairman.

The new levels are:

	Ready-To-Eat	For Further Processing
Current EU Levels	4 ppb total 2ppb B1	10 ppb total 5ppb B1
Almonds	10 ppb total 8ppb B1	15 ppb total 12ppb B1
Hazelnuts	10 ppb total 5ppb B1	15 ppb total 8ppb B1
Pistachios	10 ppb total 8ppb B1	15 ppb total 12ppb B1

The increase in the EU's aflatoxin limits is expected to result in a significant decrease in European rejections, mitigating the considerable economic impact that has been experienced with the EU's current strict standards.

The EU has also agreed to amend aflatoxin sampling plans for all tree nuts and oil seeds (including peanuts), to become aligned with the Codex sampling plans:

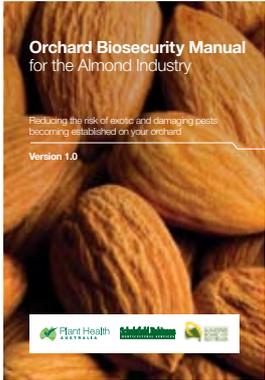
	Products	Sample Size
Ready To Eat	- shelled almonds, hazelnuts and other tree nuts -in shell pistachios	2 laboratory samples of 10 kg
	-shelled pistachios	2 laboratory samples of 5 kg
For Further Processing	- shelled almonds, hazelnuts and other tree nuts -in shell pistachios	1 laboratory sample of 20 kg
	-shelled pistachios	1 laboratory sample of 10 kg

To avoid rejection of a lot of ready-to-eat tree nuts, each of the 2 samples will have to be below 10 ppb (the average of the 2 levels will not be taken into account).

The amended levels and sampling plan are expected to enter into force in February 2010.

Protecting Our Orchards

Almond Industry Biosecurity Manual Released



The Almond Board of Australia (ABA), in partnership with Plant Health Australia (PHA), is providing almond growers with the tools to help protect its growing industry from exotic pest threats.

The Orchard Biosecurity Manual for the Almond Industry was launched at the 2009 Annual Almond Industry Conference in the Barossa Valley, SA.

This manual was developed with the expertise of Plant Pathologist, Dr Prue McMichael of Scholefield Robinson Horticultural Services and is designed to assist almond growers in protecting their orchards and the almond industry from new and invasive pests. By implementing the recommended measures in day-to-day operations, almond growers will enhance biosecurity and that of the region, while minimising productivity losses and unnecessary costs.

Early detection and immediate reporting increase the chance of effective and efficient eradication.

For more information on how to secure your orchard and secure your future can be found online at www.farmbiosecurity.com.au a joint initiative of Plant Health Australia and Animal Health Australia.

Our industry is growing rapidly with a focus on both overseas and local markets. Good biosecurity is essential to ensuring market access, and the orchard biosecurity measures outlined in the manual will help growers play a key role in protecting their own orchards and the Australian almond industry from the impacts of exotic pests. It is one way to keep our industry growing from strength to strength.

While there are stringent quarantine measures in place to try and keep these pests out of the country, we have a role to play as well. Everyone in the almond industry needs to be alert and actively involved in surveillance so if something does slip through, we have the best

chance for early detection, containment and/or eradication.

High priority exotic threats to Australia's almond growers are:

- Navel orangeworm
- Almond leaf scorch
- Glassy-winged sharp shooter
- Hyperplastic canker
- Phomopsis canker
- Almond seed wasp
- Peach twig borer
- Ten-lined june beetle
- European stone fruit yellow
- Almond brownline and decline, and Almond kernel shrivel
- Honey bee pests such as Varroa mite, due to their impact on the essential pollination services required for almond production.

Information on each of these pest threats is included in the fact sheets at the back of the manual.

As well as including a wealth of information on the high priority pests of the almond industry, this manual is designed to assist growers protect their orchards from invasive pests using simple, yet effective preventative strategies.

Regularly checking planting material, making workers aware of biosecurity measures, and cleaning vehicles and equipment, are just some techniques that can easily be incorporated into day-to-day orchard operations.

It is much easier and cheaper to reduce the risks now, than to try and live with these pests if they were to get in.

Copies of the Orchard Biosecurity Manual for the Almond Industry are available from the ABA office or the PHA website at www.phau.com.au/biosecurity

Keep an eye out for anything unusual in your orchard. If a pest is found that is not normally present in your orchard, it may be new not only to your orchard, but to the region, state or even Australia. If you see anything unusual, call the Exotic Plant Pest Hotline on 1800 084 881



Ten-lined June Beetle



Varroa Mite



Glassy-winged Sharp Shooter



Navel Orangeworm



Almond Leaf Scorch



PHA is the lead national coordinating body for plant biosecurity in Australia. Working in partnership with industry, governments, researchers and others, PHA facilitates and manages improvements in biosecurity policy and practice across Australia's plant industries and builds capacity to respond to plant pest emergencies.

PHA is also helping growers secure their farms and their futures against potentially devastating plant pests and diseases. Partnering with Animal Health Australia, PHA has developed a website with biosecurity planning information for both plant and livestock producers at www.farmbiosecurity.com.au.

Haifa's production processes adhere to the most demanding international quality and safety standards, including ISO 9001 (quality), ISO14001 (environment) and OHSAS 18001 (safety and occupational health).

Food quality drives specialty Haifa products

THE growing focus on food quality, enhanced by continuous international food scares like the latest discovery of melamine in Chinese milk products, remains a key driver behind the production of responsible plant nutrients for specialist fertiliser firm, Haifa.

The long established international corporation is renowned for its innovative solutions with premium specialty fertilisers and chemicals, food additives and technical chemicals, with its operations spanning 100 countries across five continents.

Its subsidiary in Australia, Haifa Chemicals Australia (HCA), has a strong brand in the horticulture, vegetable and nursery industries, distributing in all states through the country's major horticultural suppliers and pastoral houses.

Managing Director Trevor Dennis said Haifa's products were the benchmark for quality soluble fertilisers.

"Our products are seen as the leaders for quality, and which others are measured against. They contain next to no impurities," Trevor said.

"Haifa products are almost entirely used by plants. There is no wastage and, hence, there is also minimum impact to the environment."

The company's production processes adhere to the most demanding international quality and safety standards, including ISO 9001 (quality), ISO14001 (environment) and OHSAS 18001 (safety and occupational health).

Haifa's advanced products are designed for delivery by the most

efficient application methods, including its own 'Nutrigation' (fertigation), foliar feeding and controlled-release fertilisation.

Trevor said while Haifa was the world's pioneer and largest supplier of potassium nitrate, the company offered a full range of products, including its Haifa-Bonus NPK range that is enriched with phosphorus and special adjuvants for better adhesion, improved absorption and prolonged action; its Poly-Feed Foliar NPK range that is specially designed to enhance crop performance during specific growth stages; and its Poly-Feed Drip NPK range that is enriched with magnesium and micronutrients.

He said balanced and complete crop nutrition was critical for growers' profitability.

Haifa offers the best management practices for application of the exact balanced nutrient rate required – from the best source and at the right time into the root system and/or canopy.

"Adopting suitable nutrient management practice, grounded in proven scientific principles, will assure growers their greatest chances for success," Trevor said.

The Haifa Chemicals Australia team is now assisting growers with the design of tailor-made nutrient programs for their properties that will save costs and achieve the best outcome in terms of water and fertiliser usage and product quality.

For further information and assistance, growers can contact HCA on (03) 9583 4691.



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Phil Watters Award Winner

Loxton almond grower wins Phil Watters Award

The inaugural 'Australian Almond Industry Phil Watters Award' was awarded to Loxton almond grower Craig Spilsbury at this year's Australian Almond Conference held on Thursday, 29 October in the Barossa Valley, SA.

The Phil Watters Award recognises service to the Australian almond industry, in particular a dedication to research, development and the improvement of almond production, adoption of best practice and promotion of horticulture to the community.

The award will be presented every two years with the beneficiary receiving \$10,000 and the ability to undertake a study tour domestically or abroad. This may take the form of a technical conference, short course, grower exchange or many other exciting and informative options. The results of which will be communicated back to the Australian almond industry.

Craig Spilsbury has long been associated with the Australian almond industry with his family being one of the earlier almond producers in Willunga, south of Adelaide. Craig's grandfather Reg grew almonds before WWII. Craig's father Gill and Uncle Phil eventually took over from Reg, before Gill eventually followed some of the other Willunga families to the Riverland in the 1980s. As with many of the other Willunga families, Craig's family moved to the Riverland following the opportunity to sell their orchard to the expanding vineyard industry and move to an area with warmer temperatures, lower disease pressure, and better access to suitable soil types and more consistent water supplies. The later hasn't worked so well in recent times but that's another story.

Having worked on his family's orchards, Craig first got his start as an almond grower with his own orchard in 1991 at Loxton. Craig has been a valuable contributor to the almond industry, in particular, over the last eight years where he was one of the original growers to adopt and refine some of the research and best practice coming out of the industry's watershed

R&D project, typically known as the "CT Trial".

The CT Trial brought expertise from Israel via Professor Raphael Assaf and with it came a new management program for irrigating and fertilising almonds. Craig was in close contact with the research project and quickly recognised the benefits and results it was producing. When many people were hesitant to adopt some of the practices due to some of the significant differences to "normal"



best practice, Craig saw the trial for what it was, and with his frequent discussions with Phil and Chris, quickly adopted the trial as much as he was practically able to. Craig with his existing orchard infrastructure couldn't conduct the whole conversion but could see what needed to be done and improvised with what he had. Within a season or two Craig was soon replicating some of the higher yields achieved at the CT Trial and still out performs the current industry's benchmark yield.

Through his success, Craig has only been too happy to help other almond growers who have also tried to adopt these advances in best practice to the point he made his property available

for a demonstration and adoption field day as part of the national conference going back four or five years ago. Yields, fertiliser quantities, water quantities and nutritional sprays were all published in pamphlets for all to see and he spoke to everyone about his experiences of what to do and things he had not adopted.

In the spirit of the selection criteria:

- Excellence / Innovation;
- Adoption of best practice / Dedication to the improvement of almond production;
- Positive influence on colleagues; and
- Community involvement in promoting horticulture to the wider community;

Craig Spilsbury was awarded the inaugural 2009 Australian Almond Industry Phil Watters Award.

Craig feels privileged to be the 2009 recipient of this prestigious industry Award.

"It is a great honour to receive an Award dedicated in the memory of a man who contributed so much to the Australian almond industry," said Craig.

"My family began farming almonds in 1935, so almond farming is well and truly in my blood. I've grown up working on the family orchards and always loved what I do. The Australian almond industry is such an interesting and dynamic industry to be a part of."

The Australian Almond industry's Phil Watters Award is dedicated to the memory of Phil Watters (1974 – 2007), a widely respected individual and dedicated technical officer in the almond industry who became a role model for young and upcoming horticultural students.

To make donations to the Phil Watters Award or for more information about the Award, please contact the ABA office on 08 8582 2055 or visit the industry section of www.australionalmonds.com.au to download the forms.



Australian Almond Conference 2009

28 October - 30 October 2009 • Novotel Barossa Valley Resort

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Know how for Horticulture™

The Australian Almond Industry Conference 'Coming Out of Our Shell' was held on 28-30 October 2009 at the Novotel Barossa Valley Resort, South Australia, with attendance by 200 delegates.

Hosted by the ABA in partnership with Horticulture Australia (HAL), this event facilitates the development, learning and interaction between members of Australian Almond industry.

The conference was opened by outgoing ABA Chairman Brenton Woolston and Trevor Dennis (Title) HAIFA the Gold Conference Sponsor for 2009.

The conference kicked off with a well attended round of golf on the Tanunda Pines golf course sponsored by Select Harvests. An extremely warm day saw many balls lost in the rough – with most people too apprehensive to look for balls due to fear of snakes! This year's winning team comprised Craig Wooldridge, Phil Costa and Peter Rohrlach with a score of 69, three strokes in front of runners up Sholto Douglas, Michael Castine, Tom Murphy and Brett Kearsley. Coming in last and taking the wooden spoon for 2009 was Grant Birrell, Nigel Carey and Brent Martin.

The Welcome Function on Wednesday night, sponsored by JackRabbit provided a great opportunity for all to compare scores and network in a relaxed and informal setting before the conference officially started on Thursday morning.

Panel discussions and keynote presentations set the scene for each day. Speakers included well-known industry leaders and researchers such as Dr

Saul Cunningham from the CSIRO, Alastair James from the National Residue Survey and Dr Prue McMichael from Scholefield Robinson Horticulture. The program included discussion and updates on quality assurance, crisis management, biosecurity, global economics, marketing, trade negotiations, and almond research.

The context for this year's event was twofold: on one hand, Australia's phenomenal success in growing its export and domestic trade market supported by targeted marketing initiatives, and on the other hand, the challenges and potential threats that face our industry and our growers, with much being done to develop a sustainable industry and best practice measures for the future.

A well organised, informative and exciting event; a 'must attend' in the industry calendar

As organiser of the event, the ABA was delighted that "we had the right people there". The mix of delegates from growers to government, research institutions to industry suppliers, processing and marketing representatives ensured a good discussion on the floor and productive networking.

The 2009 annual conference dinner, sponsored by Elders, included the presentation of the inaugural Phil Watters Award. The Award was presented by Sheridan Purvis to very deserving Loxton based almond grower, Craig Spilsbury. Dinner guests then turned their attention to entertainer 'The Amazing Nigel', who's magic and stage show enthralled the audience. Nigel's astounding ability to recall every

delegate's name, including the seat that they were meant to be sitting in, (even noting if they had changed shirts) after only a brief introduction left many people intrigued and amazed at his talent.

Feedback received confirms that the Annual Almond Conference is a well organised, informative and exciting event; a 'must attend' in the industry calendar. Michael Ward from Jubilee Almonds congratulated the team for organising an excellent event. "Commendations to all ABA staff that have put in the effort to get this conference up and running, it was a great show," he concluded. This sentiment was echoed by many other of the delegates and sponsors.

The next Australian Almond Conference 'New Horizons' will be held 27-29 October 2010 in Mildura, Victoria, with further venue and event information available early in the new year.

Copies of this year's conference proceedings are available to download from the Conference section of the Almond Board of Australia website: www.australianalmonds.com.au/industry/almond-conference

Sponsorship, exhibition and conference enquiries should be directed to Jo Ireland, Communications Coordinator at the Almond Board of Australia office on 08 8582 2055 or email jireland@australianalmonds.com.au

Many thanks to everyone for their never ending enthusiasm and support and for making the conference a great success!

The Almond Board of Australia gratefully acknowledges 2009 conference sponsors



Conference Dinner



Social Golf Day



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Export Marketing Program

Australian Almonds at ANUGA, Germany 2009

The central objective of the ABA export marketing program is to continue growing demand for Australian almonds internationally.

they remained stable overall. The number of exhibitors, 6,522 suppliers from 97 countries, also remained unchanged at its previous level.

Some of the strategies the ABA has adopted to achieve this objective are to:

- Promote Australian Almonds and the Australian Almond Industry at export trade fairs
- Provide a platform for exporters to promote their products at export trade fairs
- Disseminate Australian almond industry information to export contacts, encompassing planting, production, sales data, and crop forecasts
- Provide ongoing communication with export contacts in the form of newsletters, announcements, including details of key events, programs and updates.

The Australian almond industry has identified four core export regions: Europe, the Middle East, India and Asia. The promotion of Australian almonds at the Anuga Food Fair in Cologne, Germany, is an important part of our annual export marketing program, particularly to Europe.

The Anuga Food Fair is one of the world's largest expos within the food and beverage industry. It is held every two years in Cologne, Germany. The ABA has been promoting Australian almonds at Anuga since 2005. The first promotion in 2005 was part of a wider Australian Pavilion managed by Austrade. The 2007 and 2009 exhibitions were joint promotions between the Australian Almond and Australian Macadamia industries.

Approximately 153,500 trade visitors from more than 180 countries came to the fair, with 61 per cent (about 93,500) coming from abroad. These figures were slightly lower than those for the previous event, but



The objective of our exhibition at Anuga is to provide a platform to promote Australian almonds and the Australian almond industry, in addition to providing an opportunity for Australian almond exporters to showcase their products and develop export contacts.

Australia's three major almond marketers were represented at Anuga: namely Brenton Woolston from Almondco, Laurence Van Driel from Select Harvests and Nigel Carey from Nut Producers Australia.

We had 92 visitors to our promotional stand from 36 countries. The table below breaks down the visitor total into regional area.

The greatest number of visitors came from Europe (45 visitors from 15 countries), the Middle East (23 visitors from 11 countries) and Asia (15 visitors from 6 countries).

Europe	45
Middle East	23
Asia	15
North America	7
South Africa	1
Australia	1
TOTAL	92

Whilst some of the visitors were discovering Australian almonds for the first time, the majority of visitors had made a conscious effort to visit our stand. They had either heard of Australian almonds and wanted to know more, or had purchased Australian almonds from a distributor and were interested in buying direct.

This is a major departure from previous international promotions where the majority of visitors were not aware of the size or scale of our industry.

Campaign Launched

2010 Marketing Campaign

The Almond Board of Australia (ABA) revealed its 2010 marketing campaign at the latest Australian Almond Conference 2009.

The Australian Almond Conference 2009 was held at the Novotel Barossa Valley Resort in South Australia from 28 to 30 October and welcomed over 200 guests.

Joseph Ebbage, Marketing Program Manager for the ABA, said the 2010 campaign will include eye-catching elements to really 'light up' the almond industry.

The key to a successful marketing campaign is to build strong customer relationships, both in Australian and around the world through targeted marketing initiatives.

The 2010 campaign will focus on positioning Australian almonds as a healthy, great tasting and versatile snack

and it will include point-of-sales posters, a public relations program, advertising and participation in various expos locally and overseas.

From January to February, consumers will see the 'New Year New Heart' marketing material and messages focusing on the role of almonds in lowering cholesterol and helping healthy weight management.

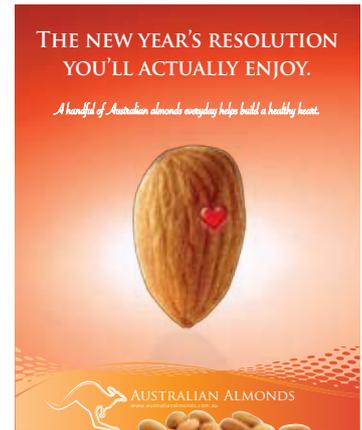
Following the almond harvest in March, the 'New season's almonds' campaign will promote the unique taste of almonds fresh from the tree.

Finally, August will reveal the natural goodness and beauty of almond blossoms exposed through the 'Australian almonds in blossom' campaign.

More than 90 per cent of almonds sold in Australia today are grown and produced by Australian farmers so the industry is

a valuable contributor to the Australian economy. It is very important to keep the industry thriving through our marketing efforts.

Further details about the ABA's 2010 Marketing Program will be revealed at the Almond Marketing Forum in Melbourne on 18th March.



AUSTRALIAN ALMOND MARKETING FORUM

To register your interest, go to www.australionalmonds.com.au/forum and follow the prompts.

Date:
Thursday
18th March 2010

Time:
9.30am start

Venue:
Rydges Bell City
Hotel,
215 Bell Street,
Preston VIC 3072

BRAND NEW 2010



AUSTRALIAN ALMONDS



All About Australian Almonds

10 Facts About Australian Almonds

A new booklet created by the Almond Board of Australia highlights 10 key facts about Australian almonds, encompassing the global almond supply and demand outlook, an overview of the Australian industry, and its relative position. Including:

1 World consumption is at an all time high and has more than doubled over the past decade at price levels attractive to both consumers and growers

Consumer demand for almonds has increased globally. This trend is expected to continue due to increased awareness of the positive health message and rapidly growing demand from developing markets.

Worldwide almond consumption has more than doubled over the past decade, with consumption growth averaging 9% per annum during this period.

2 Developing countries such as India, China and the Middle East are driving almond consumption growth

Almonds are in high demand in many developing countries and Australia is well positioned to service these markets.

3 Global almond supply, restricted by limited access to suitable growing conditions, will not meet future demand driven by population growth

Almonds are commercially produced in very few locations around the world, requiring a Mediterranean climate: cold winters during dormancy and warmer summers to develop the nut. Producing areas are further restricted by the need for suitable land and water availability.

4 Australia has a long-standing track record of successfully marketing increased tonnages into rapidly expanding domestic and international markets

Australia has successfully marketed increasing almond tonnages into both existing and newly established markets.

Key to this success is an understanding of the importance of building strong customer relationships, both in Australia and around the world. These relationships have been further strengthened by targeted marketing initiatives.



5 Australia will become the world's second largest almond producer as existing plantings mature

Australian almond plantings have increased more than seven-fold over the past eight years to a current total of 27,300 hectares.

Future production increases will occur as these young plantings reach maturity, bringing productive capacity up from 36,000 tonnes to 80,000 tonnes by 2015.

6 Australian almonds are enjoyed by more than 40 countries around the world

Almonds are now Australia's third largest horticultural export, totalling \$120 million in 2008-2009. Almonds are a significant contributor to the recent growth in Australian horticultural exports.

60% of the Australian almond crop is exported to more than 40 countries around the world. Continued export growth is anticipated with heightened international recognition of Australian almonds, combined with Australia's increasing ability to service this demand.

7 Australia is world competitive in both quality and cost

The importance of quality is recognised throughout the entire supply chain, from nursery to grower through to processor/marketer, with professional on-farm management practices, biosecurity and quarantine, and implementation of

industry quality standards and testing programs.

Australia's product quality and counter-seasonality allows access to higher priced market segments.

8 Almonds are one of Australia's most high value, efficient and environmentally friendly water converters

Historically almonds have a demonstrated track record of producing a high value return per megalitre of water applied. Sophisticated irrigation systems ensure that water application matches tree requirements and minimises environmental impact. Irrigation technology used throughout the industry is of the highest standard and latest design, with in excess of 90% of plantings under drip irrigation.

9 Almonds are a valuable contributor to the Australian economy

The Australian almond industry contributes significantly to the economic wellbeing of regional towns throughout Victoria, South Australia and New South Wales. The industry directly employs over 1,200 people in regional Australia, with additional indirect employment of a further 5,000 people.

10 Almonds are a healthy, versatile, natural food that has been consumed around the world since ancient times

Demand for almonds has been strong for thousands of years. They were a valuable commodity on the "Silk Road" between Asia and the Mediterranean, into Greece, Turkey and the Middle East.

Across the centuries, people have enjoyed the taste of almonds. One of the most popular ways of eating almonds is in its natural form. Almonds offer a unique matrix of nutrients and have been clearly linked with improved heart health.

This brochure is available from the Almond Board of Australia by contacting admin@australianalmonds.com.au or phone 08 8582 2055.

Pest & Disease Guide Updated

2009-10 Almond Pest & Disease Guide Released

The "Almond Industry Pest & Disease Control Guide" has been recently updated for the ABA by Dr Prue McMichael and Kate Delaporte of Scholefield Robinson Horticultural Services (SRHS).

Development of the industry's first edition of the Pest & Disease Control Guide was facilitated by the ABA, in partnership with Horticulture Australia Limited (HAL) in 2006, funded through the almond R&D program.

The recently updated Guide provides information on almond pests and diseases that can be controlled and monitored by orchard managers. Importantly, the Guide will be treated as a living document undergoing constant revision to ensure the inclusion of accurate and up-to-date information.

It is stressed that between reprints it is the responsibility of almond growers to access and implement the latest

information and recommendations by referring to the sources included in the Guide.

Updated information can be found at the APVMA website www.apvma.gov.au by selecting either Search PUBCRIS for registered chemicals or SEARCH for Permits on the top right hand menu. The ABA will also endeavour to keep you informed of any permit and registration changes.

A hard copy of the Guide has been mailed to all almond growers. Electronic copies of the Guide are also available free of charge to almond growers via the log-in section of the ABA's website www.australionalmonds.com.au.

Both electronic and hard copies of the Guide are available for purchase by other industry members from the ABA office, or via the shopping section of the ABA website.

NOTICE TO ALMOND GROWERS

If you have forgotten your username and password or for new users please contact: Jo Ireland, Communications Coordinator by email jireland@australionalmonds.com.au or phone 08 8582 2055



Australian Almond Conference 2010

New Horizons

Mildura, Victoria

Wednesday,
October 27th

-
Friday,
October 29th

Publications

Please contact the Almond Board of Australia Office
on 08 8582 2055 or email admin@australionalmonds.com.au



Almond Industry Pest & Disease Control Guide

3rd Edition

This Pest & Disease Guide provides information on almond pests and diseases that can be managed and monitored by orchard managers.

Hard Copy \$20.00

CD ROM \$10.00

Integrated Pest Management for Almonds

University of California, USA (2002)

2nd Edition

Covering 120 different pest problems including diseases, insects and mites, nematodes, vertebrate pests, and weeds. You'll also find expanded chapters on vertebrate pest management and vegetation management including recommendations for control techniques where endangered species occur and detailed information on cover crops. You'll also find revised sections on navel orangeworm and peach twig borer along with revised and updated tables on susceptibility of rootstocks and scion cultivars to major pests. Illustrated with 259 photos, 69 line drawings and tables, and a detailed index.

Hard Copy \$40.00

Economics of Almond Production in Southern Australia

This report analyses the financial performance of a range of six South Australian almond properties, establishing comparative information and developing benchmarks for economic performance.

Hard Copy \$30.00

CD ROM \$15.00

Almond Production Manual

University of California, USA (1996)

Provides information on all stages of almond production, from planting and developing new orchards to managing bearing orchards and harvesting and handling crops. Written by more than 50 UC experts, the manual's information is practical and suited to field application. More than 80 colour photos.

Hard Copy \$37.50



Australian Nutgrower Magazine (Subscription)

Australian Nutgrower is the journal of the Australian Nut Industry Council Ltd (ANIC) and is published quarterly in March, June, September and December. It is a full colour publication covering nut industry news, research summaries, interviews, updates from overseas research and advertising. Subscription is for one year = 4 journals

\$80.00

Orchard Biosecurity Manual for the Almond Industry

Plant Health Australia & Almond Board of Australia (2009)

Designed to assist almond growers in protecting their orchards and the almond industry from new and invasive pests. As well as including a wealth of information on the high priority pests of the almond industry, this manual is designed to assist growers protect their orchards from invasive pests using simple, yet effective preventative strategies.

No Charge

Almond Board of Australia Publications

The Almond Board of Australia has a range of publications available for distribution. Including:

The Australian Almond Industry Booklet

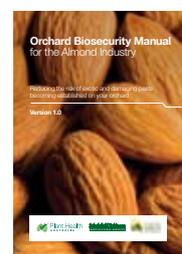
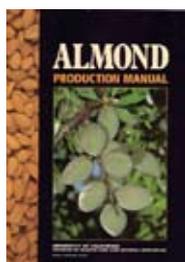
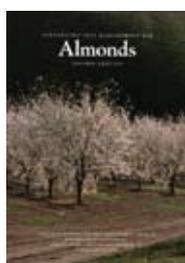
Detailing many aspects of the Australian Almond Industry this booklet provides an overview of growing regions, statistics, nutrition and almond lifecycle.

All About Australian Almonds

A new booklet created by the Almond Board of Australia highlighting 10 key facts about Australian almonds, encompassing the global almond supply and demand outlook, an overview of the Australian industry, and a its relative position.

Australian Almonds DVD

Highlighting key facets of Australian almonds and the Australian almond industry. Featuring award-winning Australian chef and 'Almond Ambassador' Stefano de Pieri and showcasing almond orchards in blossom.





Wishing you
and your family a

*Very Merry
Christmas and a
Prosperous 2010*

*from the ABA Board
members and staff*

calendar

November

30

Australia-India Almond Trade Function
New Dehli, India

December

3

Australia-India Almond Trade Function
Mumbai, India

24

Almond Board of Australia Office
Christmas Closure

January

4

Almond Board of Australia Office
Re-Open for 2010

18

Almond Production Committee Meeting
Berri

19

Plant Improvement Committee Meeting
Berri

21

Marketing Committee Meeting
Mildura

February

3

ABA Board Meeting
Mildura

4

Almond IAC Meeting
Mildura

10

ANIC Board Meeting
Sydney

21-24

Gulfood 2010
Dubai International Convention &
Exhibition Centre
www.gulfood.com

March

18

ABA Marketing Forum
"Brand New 2010"
Rydges Bell City, Melbourne

May

19-21

SIAL 2010
Shanghai, China
www.sialchina.com

21-23

INC Congress
XXIX World Nut & Dried Fruit Congress
Beijing, China
www.nutfruit.org

October

27-29

Almond Industry Conference
"New Horizons"
Mildura, Victoria

Almond Board of Australia

ABN: 31 709 079 099

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www.australionalmonds.com.au



In A Nutshell



In this issue:

2010 USA Study Tour

Almond Marketing Forum 'Brand New 2010'

Planning for Climate Change

'New Year, New Heart' Campaign



AUSTRALIAN ALMONDS



Contents

- 2** Planning for Future Almond R&D Investment
- 3** 2010 USA Study Tour
- 4** New Year, New Heart
- 4** Nuts for Life Update
- 5** Australian almonds in India
- 5** Breeding Research Showcased at ARC Expo
- 6** Taking Australian almonds to China
- 7** 2010 Australian Almond Marketing Forum
- 8** Grower Profile - Brendan Sidhu
- 9** Climate Change and the Australian Horticulture Industry
- 11** Growers Managing Business Risk
- 12** Calender

Edition	Advertising Deadline	Material Deadline
February	15th January	10th February
May	15th April	10th May
August	15th July	10th August
November	15th October	10th November

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development. In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties. Please contact the Almond Board of Australia for current membership fees and inclusions.

Advertising/Editorial

The Almond Board of Australia acknowledges contributions made by private enterprise through placement of advertisements in this publication. Any advertising and/or editorial

supplied to this publication does not necessarily reflect the views of the Almond Board of Australia and unless otherwise specified, no products and/or services are endorsed by this organisation

Editor

Jo Ireland

Communications Coordinator

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These projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



Planning for Future Almond R&D Investment

An R&D Strategic Plan for the Australian almond industry is currently being developed to provide clear strategic direction for future R&D investment and, in particular, the almond levy investment program managed through HAL. The plan is expected to be completed for launch at this year's Almond Conference in October 2010.

The Almond Industry Advisory Committee (IAC) will be involved in the planning process with relevant expertise included where appropriate. Others to be included through a range of processes will include almond industry representatives, key service providers, HAL staff and private consultants.

A robust, well developed R&D strategic plan is an essential foundation for an effective investment program of industry R&D levy. Over the next five years, HAL, in consultation with the Almond IAC, is likely to invest more than \$10-15 million, (through a combination of almond levies, voluntary contributions and matched funding from the Australian Federal Government) on behalf of the Australian almond industry. Therefore, it is critical that the investment continues to be well directed and a robust strategic plan will help to achieve this.

The Victorian Department of Primary Industry (VIC DPI) will also have input into the planning process to gain perspective from R&D providers. VIC DPI have agreed to take on the role of lead agency for almond research and development.

Management of the planning process will be overseen by a Steering Committee comprising:

- HAL Industry Services Manager (Ross Skinner)
- Almond (IAC) Chairman (Greg Buchanan)
- VIC DPI Director, Strategy and Partnerships (Phil Haines)
- ABA CEO (Julie Haslett)
- ABA Industry Liaison Manager (Ben Brown)

A brief to engage a suitable facilitator for this process has been developed.

Following finalisation of the R&D Strategic Plan, activities will then focus on detailed development of recommended investment priorities and related R&D initiatives for investment in 2011-12, with a view to developing a longer term (eg. 5 year) Almond R&D program.

If you have any queries or require further information, please contact:

Ben Brown, Almond Board of Australia
Ph: 08 8582 2055 or email
bbrown@australionalmonds.com.au



ALMOND BOARD OF AUSTRALIA



The ABA will be hosting a tour through the almond growing areas of California in June 2010. The study tour will take place on Friday June 11th (depart Australia) to Tuesday 29th June inclusive.

Activities will be broad and varied, so will be of interest to any industry member who hasn't had the opportunity to visit California. It is also a fantastic opportunity to nurture relationships with any existing overseas contacts.

This study tour will predominately be focused on activities related to almond growing and production throughout the length of the California Central Valley. We will be aiming to meet growers, researchers and farm advisors from each of the different regions from Chico in the North, Davis, Modesto, Fresno and Bakersfield in the South. So no matter which almond growing region in Australia you come from, there will be worthwhile comparisons that can be made between almond growing in Australia and in California.

We endeavor to visit most of the major machinery suppliers to see how their equipment is manufactured and hear about any new improvements that may be planned. There will be visits to a couple of local processors and handlers and some of the larger nurseries. Finally we will be observing one of the local water authorities to gain a perspective on the difficulties in supply

and delivery of irrigation water that Californian growers face.

There will be time allocated for tourism and to take in the sights that California has to offer. Once we arrive in San Francisco, there will be two days allocated to acclimatize and enjoy the attractions of the city. Maybe you're interested in the architecture of the Victorian style homes, the famous cable cars, Alcatraz Prison, Fisherman's Wharf or Chinatown and the many restaurants?

After leaving San Francisco, it's off to the Napa Valley to enjoy California's premier wine country. A range of fine dining and wine tasting will be undertaken to continue the acclimatization process before embarking on the 'study' part of the tour. We will also head to Yosemite National Park for a couple of days of R&R while in Modesto and finish the trip in Los Angeles where there will be two days to take in the glitz and glamour.

The ABA will be applying for HAL funding for this study tour to help reduce costs incurred by participants. The expected cost per participant of \$6,000 will cover the cost of travel insurance, airfares and taxes, coach transport between destinations, accommodation, daily breakfast and entry to tourist attractions.

Expenses **not** covered are: excess baggage, passport and visa fees, and general personal expenditure.

There are limited places for this tour, so please book early to avoid disappointment!

How do I sign up?

- Please complete the enclosed Registration of Interest Form and return to the ABA office, together with payment of a non-refundable deposit of \$200 by 14th March, 2010.
- Make sure you have a current passport that is valid until 1st January 2011. Passport details need to be provided to the ABA no later than Friday, April 9, 2010. (Please contact www.passports.gov.au or your local Australia Post to apply for a new passport and allow at least one month for processing)
- Trip to be paid in full by Friday 16th April, 2010 (full cost to be advised)

If you have any queries or require further information, please contact:

Brett Rosenzweig
Almond Board of Australia
Ph: 08 8582 2055 or 0429 837 137
or email
brosenzweig@australionalmonds.com.au

NEW YEAR, NEW HEART



The ABA kicked off the New Year with a health message, highlighting Australian almonds' role in promoting cardiovascular health and reducing the risk of heart disease.

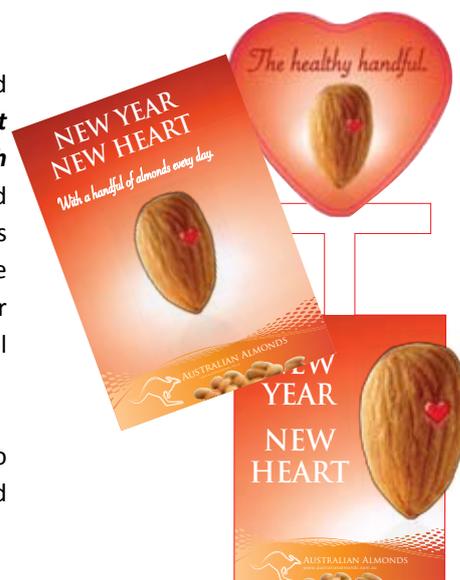
The 'New Year, New Heart' message and related marketing material was seen across Australian supermarkets from 15 January until 14 February. The campaign was supported by magazine advertising appearing in

the January edition of 'BBC Good Food' magazine and the February edition of 'Women's Health' magazine, public relations and in-store point of sale.

A long-lead press release was distributed in early December 2009, entitled '**Get that New Year resolution nuted out with Australian almonds**'. The release included key messages from our almond ambassadors Sara Grafenaeur (Dietitian) and Sue Heintze (Fitness Trainer) highlighting cardiovascular and weight loss benefits of eating a handful of almonds every day.

The ABA website home page was also amended to reflect this promotion and reinforce the campaign.

For more information on current Almond Board promotional activities please visit www.australialmonds.com.au/trade



www.nutsforlife.com.au
Follow us on twitter

Nuts for Life

2010 will be a busy year for the Nuts for Life Regulatory Affairs program, as the new core food groups are to be announced in the coming months and a dietary guidelines review and FSANZ Health claim projects are ongoing.

We are pleased to have contracted Liz Munn for 20 hours a week for 12 months to assist Lisa. Liz is an Accredited Practising Dietitian with 15 years experience at Choice magazine and now runs her own consulting business. She will be responsible for managing the Nuts for Life website as well organising conferences and sponsorships for the coming 12 months. Liz will be working from the Nuts for Life office 2.5 days a week (Monday, Tuesday and Thursday) and can be contacted via the Nuts for Life email and phone - admin@nutsforlife.com.au and 02 9460 0111 which she will share with Lisa.

FSANZ Update

Lisa has been working with the Heart Foundation and FSANZ to address some of the proposed nutritional claims regarding healthy dietary fats. Our proposal includes being able to describe healthy high fat foods as "rich in" monounsaturated or polyunsaturated fats and include general level health claims, which will allow the function of fats to be described on pack. This document will be submitted shortly and we are organising a meeting with members of FSANZ in Canberra for the third week of March 2010.

Contributors staff education meetings

To ensure that all members of the Australian Nut Industry confidently answer the curly questions on the health benefits of nuts so they can spread the word,

Nuts for Life is developing a workshop for contributors and their sales, marketing and customer service staff. Our first set of workshops will be in Queensland the second week of March 2009. If interested in attending the Bundaberg, Gympie or Alstonville events please **RSVP** by 26

February 2010 to Sarah Jane Hall

– The Australian Macadamia Society 02 6622 4933 or office@macadamias.org A Brisbane workshop has also been organised for Stahmann Farms and Scalzo Food Industries. Other workshops will come online shortly in Adelaide, Melbourne and Sydney.

Lisa Yates

Program Manager and Dietitian
Nuts for Life
Ph 02 9460 0111

Email admin@nutsforlife.com.au

AUSTRALIAN ALMONDS IN INDIA



The Almond Board of Australia (ABA) announced during its annual trade visit to India a 25 per cent increase in the 2010 Australian almond production which is expected to reach 46,100 tonnes, up from 36,500 tonnes in 2009.

The announcement was made on Monday, 30 November at an almond trade function hosted by the ABA in Delhi and attended by key Indian almond traders and distributors as well as representatives from the Australian High Commission.

India is Australia's largest export market for almonds and currently imports 40 per cent of Australia's almonds.

Representatives from Almondco, Nut Producers Australia and Select Harvests participated in the trade visit to India, where current strong demand for Australian almonds continues to grow.

The news of Australia's increased production estimate was well received by the Indian trade, as demand for Australia's high quality almonds has never been greater. Almonds are an integral part of India's cultural heritage and are given as a prestigious gift during festive periods and weddings.

Following on from this successful trade visit to India, key trade representatives have been invited to visit Australia and participate in a tour of the Australian almond industry.

The ABA, working in conjunction with Almondco, Nut Producers Australia and Select Harvests, will host more than 20 Indian visitors in mid-March 2010. The tour itinerary will include visits to almond orchards, hulling and shelling plants and almond processing facilities.

The tour program will include attendance at the Australian Almond Marketing Forum 'Brand New 2010' on March 18 in Melbourne.

Breeding Research Showcased at ARC Expo

On 26 October 2009 twenty-five Australian universities participated in the first Australian Research Council (ARC) Research Expo in Canberra which accompanied the ARC major grants announcements. The University of Adelaide attended the event to showcase their almond breeding research.



Above & Above Right: Senator the Hon Kim Carr, Minister for Innovation, Industry, Science and Research tasting the wares at the University of Adelaide Stand.

The ARC Linkage-Projects program supports collaborative research projects between higher education researchers and other organisations, including industry. It is the major program providing Commonwealth funding for strategic research alliances between higher education institutions and industry.

The ARC Research Showcase was held at Parliament House in Canberra. The Showcase display, designed by Adelaide Research & Innovation, University of Adelaide, featured agricultural research success stories, including developments in almond breeding quality and yield, and special tasting samples of the baking benefits of FR Durum Wheat, all projects currently under investigation at the University's Waite Campus.



Senator the Hon Kim Carr, Minister for Innovation, Industry, Science and Research was present and we were lucky enough to attract Minister Kim Carr's attention for a few minutes - it was definitely the food! He only visits a couple of stands each year, and this year there were more than 20 Universities on display, so we were very lucky.

*by Michelle Wirthensohn,
University of Adelaide*

Photos Courtesy: Norman Plant

Taking Australian Almonds to China

Nuts continue to be one of the markets with the strongest growth in Asia, due to consumers' perception of nuts as a healthy choice.

In many developing Asian countries, economic growth has resulted in increased demand for nuts and dried fruits. With a population of 1.2 billion, China is expected to achieve 9.9% real growth in 2010 according to Informa Economics Inc. China is also recognised as a rapidly emerging almond market, with strong potential for continued future consumption growth.

In general, almonds are considered as snack food in China, although almonds are increasingly being used as recipe ingredients, especially in the baking industry.

Almond consumption typically increases in September during the Moon Festival and peaks during the Chinese New Year, which falls in January or February.

Later in the year, the ABA will be coordinating a market study tour to China. This initiative is supported by funding through Primary Industries of South Australia (PIRSA) and the Australian Federal Government through Horticulture Australia Limited (HAL).

To support our upcoming activities in China, the ABA have registered with Food Adelaide for the six months to June 2010. Food Adelaide's core business is "Connecting buyers with Australia's finest food and beverages".

Food Adelaide will assist us in the following activities:

- Translating a number of our key fact sheets and brochures

- Developing a Food Adelaide specific industry outline. This will be distributed through both their Chinese and Japanese offices.
- Providing a translator for our stand at SIAL China
- Providing a point of contact within China after the SIAL China expo.

The 10 day itinerary will incorporate a series of events and activities including market visits, trade meetings and presentations, and attendance at the XXIX World Nut & Dried Tree Fruit Congress, taking place in the Chinese capital city of Beijing, May 21-23.

*For more information visit
www.nutfruit.org/china-2010*

The tour also includes attendance at the SIAL China Food and Beverage Exhibition on 19-21 May, in Shanghai. This event will provide an opportunity to gain insights into this new and emerging market.

SIAL China is China's largest and leading international exhibition for the Food, Beverage and Hospitality trade. It is the unique and perfect picture of the Chinese food and beverage market. 50% of the exhibitors are from mainland China with 25 Chinese provinces represented in 2009. They include local producers, importers and distributors of international brands. The other 50% are from all over the world with 20 International pavilions of companies, government agencies and institutional organizations.

SIAL China 2009 Figures

- 1057 exhibitors from 50 countries
- 40,250 sqm exhibition surface
- 13% international visitors from 84 countries
- 302 journalists on site

*For more information visit:
www.sialchina.com*



REGISTER NOW!

LEARN WHAT'S 'BRAND NEW' AT THE 2010 AUSTRALIAN ALMOND MARKETING FORUM



AUSTRALIAN ALMOND MARKETING FORUM

- Opportunities to leverage almond promotions to drive growth within your business
- Global food trends and marketing initiatives
- New insights into almond marketing in Australia and around the world
- International perspective on the future of the almond market

Date:
Thursday
18th March 2010

Time:
9.30am start

Venue:
Rydges Bell City Hotel,
215 Bell Street, Preston VIC 3072

PROPOSED PROGRAM

*Please note that the forum organisers reserve the right to amend this program at any time.

9.30am - 11.00am

Welcome & Opening
Brand New: 2010 Crop Update
Almond Marketing Program -
What's in Store for 2010?
New Season Launch

11.00am - 11.30am

Morning Tea

11.30am - 1.00pm

Creating New Opportunities for Almonds -
Using Information and Insights to
Understand Consumers and Drive Sales
Insights from an Australian Retailer
Almonds get the Tick

1.00pm - 2.00pm

Lunch

2.00pm - 3.00pm

Future Trends in Commodity Pricing
Case Study Presentation: TBC

3.00pm - 3.30pm

Afternoon Tea

3.30pm - 4.30pm

Key Export Markets - Panel Session

7.00pm

Forum Dinner & Entertainment (\$90/pp)

BRAND NEW 2010



FEATURED SPEAKER

Bianca Chatfield

Australian netball player and almond ambassador, Bianca Chatfield, represented Victoria at the National Netball Championships. She currently plays with the Melbourne Vixens in the ANZ Championship. In 2008 she was the vice-captain of the Melbourne Vixens and then was made Co-Captain in 2009. Bianca was a member of the silver medal-winning team at the 2006 Commonwealth Games in Melbourne.

Bianca will talk about her experiences as an elite sports person and the role of good nutrition. She will explain the importance of the dietitians that work with both the Australian Netball team and the Melbourne Vixens, and how almonds are included in their recommended snacking regimes. Hence her support for the ABA's emerging "Almonds and Netball" program.



AUSTRALIAN ALMONDS



ROWER PROFILE

Brendan Sidhu
Chair - Almond Board of Australia
Managing Director - Jubilee Almonds

Favourite Quote:

If you're not living life on the edge, you are taking up too much space.

Education/Training:

*As little as I could get away with!!
Advanced Diploma (Horticulture),
GAICD (Graduate of the Australian
Institute of Company Directors).*

Orchard/s:

Jubilee Almonds

Varieties Grown:

*Non-Pareil, Neplus, Carmel, Price,
Peerless, Fritz.*

Employment history in the almond industry:

*Adrian Lacey, OLNEY, 1983
Freeman Farming, 1983-1987
Jubilee Almonds, 1991-Present*

How do you see the almond industry changing over the next 10 to 20 years?

I see both area expansion, increased production per hectare and improvements in the end quality of product.

What do you see as the almond industry's biggest asset?

The structure of the ABA. The extension work that has been undertaken and that continues today. The access to work for members, also great improvements in the marketing program.

If you weren't involved with the almond industry, what do you think you'd like to do?

Scuba Diving Instructor on Rhodes Island (Greece).

If you were to invite three people to dinner (fictional, dead or alive) to brainstorm the future of the Australian almond industry, who would you invite and why?

I'd only need to invite one - my wife. She knows everything.

Why is it important to you to be a member of the ABA?

So you can have input to help shape the future of the industry, and so you have access to up to date information such as R&D (varieties, production etc).

Just for Fun

I should have.....

Listened to my wife, and not made the smart comment above!

I wish that I could.....

Make it rain in the Murray Darling Basin.

The first thing I do when I get to work is.....

Prime the coffee machine.

If you would like to nominate someone for a Grower Profile:

Please contact Jo Ireland
at the ABA on
08 8582 2055
or email
jireland@australionalmonds.com.au

CLIMATE CHANGE

and the Australian Horticulture Industry



In comparison to other agricultural sectors, horticulture has a small environmental impact relating to climate change. While agriculture emissions amount to some 16% of all national industry emissions, horticulture comprises just 1% of this total.

Despite this, the industry is still vulnerable to predicted changes to rainfall and temperature that will impact on plant growth, pest and disease risk, product quality and industry location.

There is also the potential for climate change to provide some opportunities for growers.

While there has been a significant amount of research already undertaken, there are still gaps in climate change research relevant to horticulture.

The Horticulture Climate Change Action Plan has recently been developed to identify RD&E needs in the area of climate change and variability. The key question guiding development of the action plan is

Horticulture's greenhouse gas emissions equate to just 1.0% of agriculture's emissions, while horticulture constitutes approximately 25.5% of the GDP of Australian agriculture

"What does climate change mean to my farm or orchard?"

The Action Plan has three strategies:

- Adaptation
- Mitigation
- Information, Awareness and Communication

Adaption

Developing a clearer understanding of climate change and variability issues to avoid the risks and/or take advantage of the opportunities of a variable and changing climate into the future.

Mitigation

Determining the contribution ('carbon footprint') that all horticulture (and specific regions and commodities) makes to methane, nitrous oxide and carbon dioxide emissions.

Work can then be undertaken to identify and promote pest management practices that minimise greenhouse gas emissions, and, at the same time, promote the "simultaneous" goals of productivity, sustainability, adaptability and "abatement".

Information, Awareness & Communication

Informing growers, politicians and the community about the impact

of climate change, and to develop simple and helpful information products that promote horticulture specific messages to the community, as well as industry stakeholders.

Next Steps

Climate change will impact on horticulture with different outcomes, depending upon location, industry supply chain and time frame. However, growers and producers can respond to these challenges, especially if they focus on climate change as being another business issue associated with investment planning, financial planning, process and operational management, product positioning and branding, and pricing strategy.

For more information please contact Alison Turnbull at Horticulture Australia. Copies of the 'Climate Change Research Strategy for Primary Industries' brochure are available for download from the ABA website www.australialmonds.com.au

Further information/useful websites:

www.horticulture.com.au
www.lwa.gov.au
www.managingclimate.gov.au
www.climatechange.gov.au
www.climatechangeinaustralia.gov.au
ageis.climatechange.gov.au
www.bom.gov.au/watl





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www.shakermaker.com

Growers Managing Business Risk

by David Pocock, PIRSA

The almond industry has been funded under a PIRSA project to deliver a Fact Sheet on Almond Farm Economics. The project will promote and use the Almond Economic Spreadsheet to illustrate the points which are put forward surrounding Almond Farm Economics.

The industry has contracted David Pocock from Rural Solutions SA to;

- Describe the outcome of numerous, relevant scenarios such as increasing yields, bee hive rental increases, fertiliser quantities and increased input costs, interest rate increases, rising Australian dollar, time to positive cash flow and/or profitability if wanting to expand your holdings at the current time.

- Generate key economic indicators which growers need to take note of: e.g. debt to equity ratios, income & serviceable debt, etc.

For more information contact David Pocock preferably by email david.pocock@sa.gov.au or on 08 85959 100.

South Australian Growers also have access to individual assistance under the program to use their own information.



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For enquiries contact
Wayne Francis:
Ph: 08 8595 8080
Mob: 0429 807 315
E-mail: wayne@laragon.com.au

Small Almond Machinery For Sale

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- Sorting Belt
- Blowers
- Elevators

P.O.A

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Ah; 08 8323 8648

A close-up photograph of almond processing machinery, showing a dark metal hopper and a conveyor belt system.

For Sale
Almond Trees

GF677 - Ready for 2010 planting
1000 Nonpareil
500 Carmel
500 Monterey

Call Tony on
0424 786 731

A background image of almond blossoms in bloom, with a soft, light blue and white color palette.



AUSTRALIAN ALMOND MARKETING FORUM

Registrations now open!

Visit :
www.australionalmonds.com.au/forum
for program information and
registration forms

Date:
Thursday
18th March 2010

Time:
9.30am start

Venue:
Rydges Bell City
Hotel,
215 Bell Street,
Preston VIC 3072

BRAND NEW 2010



AUSTRALIAN ALMONDS



calender

February

21-24

Gulfood 2010
Dubai International Convention &
Exhibition Centre
www.gulfood.com

March

18

ABA Marketing Forum
"Brand New 2010"
Rydges Bell City, Melbourne
www.australionalmonds.com.au/forum

May

19-21

SIAL 2010
Shanghai, China
www.sialchina.com

21-23

INC Congress
XXIX World Nut & Dried Fruit Congress
Beijing, China
www.nutfruit.org

June

4-6

Good Food & Wine Show
Melbourne Convention & Exhibition
Centre
www.goodfoodshow.com.au

11-27

ABA USA Study Tour
Californian Central Valley
www.australionalmonds.com.au/industry

July

16-18

Good Food & Wine Show
Sydney Convention & Exhibition Centre
www.goodfoodshow.com.au

October

27-29

Almond Industry Conference
"New Horizons"
Mildura, Victoria
www.australionalmonds.com.au



Australian Almond Conference 2010

**27th - 29th October
Mildura, Victoria**

Almond Board of Australia
ABN: 31 709 079 099
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PO Box 2246 BERRI SA 5343 Australia

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In A Nutshell

May 2010



ALMOND
BOARD OF
AUSTRALIA



In this issue:

Indian Impressions

2010 Australian Almond Tour

New Horizons

Australian Almond Conference 2010

In Season

Australian Almonds Come out in Style!

GrowSmart Training

Looking to the Future



AUSTRALIAN ALMONDS

www.australianalmonds.com.au



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- 5** Indian Impressions - 2010 Australian Almond Tour
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The 2010 Australian Almond Marketing Forum held in Melbourne on Thursday, 18 March attracted 100 professionals from all aspects of almond trade including wholesalers, retailers and distributors to hear about the Australian almond industry's "Brand New 2010" campaign.

The program featured insights into consumer behaviours, food trends and the international market. Delegates also learnt about opportunities to drive consumption through effective promotion.

The Forum also reinforced the nutritional value of almonds as well as an overview of Australia's key export markets, including two interactive panel sessions focussing on Europe and India.

Exporting Australian Almonds

According to Julie Haslett, speaker and ABA CEO, the demand for almonds has doubled over the past decade with developing countries like India, China and the Middle East driving consumption growth. 63% of Australian almonds sold in 2008/09 were exported to over 40 countries around the world. Of those, India was Australia's largest export destination, importing 42% of Australia's almond exports.

A highlight of the Forum was a panel session focussing Europe, one of Australia's most important export markets. According to speaker Liam O'Gorman from UK-based GLM Trading, the Marketing Forum was incredibly informative for both domestic and export customers.

"The Australian almond industry has developed a measured momentum which will turn Australia from a niche alternative supplier to Europe into a mainstream provider of high quality almonds," Mr O'Gorman explained.

A healthy handful

Bianca Chatfield, Australian Netball team player and Melbourne Vixens Netball team co-captain, joined the presenters to talk about the role of almonds and good nutrition in sport.

"Kids and their parents need to understand that good nutrition is essential to performing well in their favourite sport. Almonds are full of 'good fats' and important nutrients that give you the required energy for your game. I have my healthy handful of almonds everyday," Chatfield said.

Almond Marketing Forum 2011

The 2011 Australian Almond Marketing Forum "Better with Almonds" will be held on Thursday, 17th March at the Sydney Marriott Hotel, commencing at 9:30am.

To register or for information on the 2011 Almond Marketing Forum visit www.australionalmonds.com.au/forum

Edition	Advertising Deadline	Material Deadline
February	15th January	10th February
May	15th April	10th May
August	15th July	10th August
November	15th October	10th November

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development. In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties. Please contact the Almond Board of Australia for current membership fees and inclusions.

Advertising/Editorial

The Almond Board of Australia acknowledges contributions made by private enterprise through placement of advertisements in this publication. Any advertising and/or editorial

supplied to this publication does not necessarily reflect the views of the Almond Board of Australia and unless otherwise specified, no products and/or services are endorsed by this organisation

Editor

Jo Ireland

Communications Coordinator

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Some of these projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



Know-how for Horticulture™

IN SEASON

Australian almonds come out in style!

The ABA launched its 'New Season's Almonds' campaign on 28 April, with the unveiling of the almond dress in Martin Place, Sydney. Model, Rebecca Caulfield paraded the dress throughout the Sydney CBD, accompanied by the ABA team distributing tins of New Season Australian Almonds to the public.

Up and coming Australian designer, Gillian Christie hand sewed 3,000 almonds to make this stunning dress. Unveiling of the almond dress created a real buzz about Australian Almonds, with the dress providing both a spectacle in itself, and a great way to engage and inform the general public of the unique taste of Australian almonds fresh from the tree.

Photos from the day can be viewed online at www.flickr.com/photos/aussiealmonds. The media stunt in Martin Place gained significant press coverage, with articles appearing in a range of publications including Media Blips, Your Restaurants and the Weekly Times. To support this initiative, the ABA produced a short video highlighting the creation and promotion of the dress, which can be viewed on YouTube www.youtube.com/watch?v=bb2R7uaXiAY

The eye-catching almond dress concept was developed to promote freshly harvested "New Season" almonds available in stores across Australia. Integrated "New Season" promotion activities throughout April and May incorporated in-store point of sale materials, almond snack tin give-aways and magazine advertising in Superfood Ideas, Weight Watchers and BBC Good Food Magazines.





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INDIAN impressions

Indian Trade Delegation Visits Australia

The ABA recently hosted a delegation of more than 20 Indian almond trade representatives for a harvest tour of the Australian Almond Industry.

The four day tour included visits to almond orchards and processing facilities throughout the Riverland and Sunraysia regions, including: Almondco Australia, Century Orchards, Jubilee Almonds, Laragon, Riverland Almonds and Select Harvests. The tour concluded in Melbourne on 18th March with attendance at the Australian Almond Marketing Forum (see page 2). A number of delegation members participated in an Indian panel session, where they shared their experiences with Australian almonds and perceptions of the Indian almond market.

A reciprocal visit to India by Australian almond trade representatives is scheduled for February 2011.

feedback from tour participants

"Many thanks for the hospitality extended towards the Indian Delegation on their most memorable tour."

"It was our pleasure to meet you during our visit to Australia. We must thank you for all the efforts you made to make our visit memorable."

"I think the biggest thing which this delegation has carried back home is the confidence in the Australian supply source, which would translate to business opportunities in coming years, and that is purely because of your team efforts to promote Australian Almonds in India."

"It was a memorable trip. I cannot thank you enough for the effort."

"Everything was beyond our expectations"



Participants visiting Almondco as part of their four day Australian Tour



Australian Almond Conference 2010

27th - 29th October Mildura, Victoria

The Almond Board of Australia is pleased to present the 2010 Australian Almond Industry Conference 'New Horizons' being held Wednesday, 27th October to Friday, 29th October in Mildura, Victoria.

The Annual Almond Conference is the premier event for the Australian almond industry, bringing together approximately 200 delegates from all facets of the industry including growers, processors, marketers, researchers, nurseries and other industry suppliers.

Due to overwhelming support from past sponsors and exhibitors, only limited sponsorship opportunities remain. Sponsors and exhibitors will benefit from an extensive conference marketing campaign before and during the 2010 conference. In addition to this, a 'Sponsor Drinks' session on Thursday evening prior to the annual Conference dinner, will allow delegates to chat with exhibitors and sponsors at their leisure.

For further information, please contact Jo Ireland - Communications Coordinator at the ABA office or email: jireland@australianalmonds.com.au

Preliminary Program

Wednesday, October 27th

- Trade Exhibition Setup
- Social Golf Day
- Welcome Function

Thursday, October 28th

- Registration
- Trade Exhibition
- ABA Annual General Meeting
- Official Conference Opening
- Annual Levy Payers Meeting
- Keynote Addresses
- Pre Dinner Exhibition Drinks
- Annual Conference Dinner

Friday, October 29th

- Trade Exhibition
- Keynote Addresses
- Almond Orchard Visit

The Conference organisers reserve the right to amend the program at any time if circumstances change following the printing of this newsletter. Please visit www.australianalmonds.com.au for latest program details leading up to the conference.

Registrations Open

To register for the 2010 Australian Almond Conference, simply complete the enclosed registration form, or visit www.australianalmonds.com.au/industry/almond-conference and download a registration form.

**Early bird registrations close
Monday, August 2nd,
so register now and save!**

The Setts Bar & Function Centre

**27th - 29th October
110-114 Eighth St
Mildura Victoria 3500**

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Social Program

Golf Day



Wentworth Golf Club

Enjoy a memorable day of golf with fellow delegates in an ambrose style competition at the beautiful Wentworth Golf Club. The course boasts lush fairways between stands of large river gums, whilst tree-lined fairways wind their way around eight lakes, coming into play on nine of the course's holes. Tackle tricky bent grass greens, subtle contours and a true surface that will always reward a good putt.

Welcome Reception



'PV Mundoo'

Join us on the Paddle Vessel Mundoo. Built in 1987 at Goolwa, South Australia - a steel hull construction, 34.9 metre long paddleboat, featuring attractive quality timber ceilings and bar facilities. This twilight cruise will depart the Mildura Wharf at 7pm SHARP and cruise upstream from Mildura. Live entertainment will be provided giving delegates the opportunity to dance if they choose, or to merely sit back and enjoy the tranquil floodlit river banks created by the PV Mundoo's powerful floodlights.

Conference Dinner



'The Setts'

Anyone who attends the conference is invited to attend the dinner. Partners are also very welcome. The dinner is a chance to network and communicate socially with other conference attendees and delegates in a relaxed atmosphere. Dinner tickets are included with full registration prices, and extra tickets are available upon request. Be sure to attend the Conference dinner - it will be an evening to remember!

The Almond Board of Australia gratefully acknowledges 2010 conference sponsors

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Bronze Sponsors



Dinner Sponsor



Golf Sponsor



Welcome Sponsor



Exhibitors



Supporting Sponsors



Limited sponsorship opportunities still exist. To enquire about availability please contact Jo Ireland at the ABA office on +61 8 8582 2055 or jireland@australionalmonds.com.au



Grower Profile

Neale Bennett

Deputy Chair - Almond Board of Australia
Sunraysia Region -
Almond Grower Representative

Favourite Quote:

"We'll cross that bridge when we come to it"

Education/Training:

Completed HSC and accepted to do Applied Science Degree at Uni. Deferred and never went back.

Orchard/s:

42 acres in the Sunraysia region.

Varieties Grown:

Non-Pareil, Carmel and Price.

Employment history in the almond industry:

After being involved in the dried vine fruit industry for 10 years (family for over 80 years and I'm the black sheep who broke tradition!), started redeveloping our property to almonds in 1992. Kept going till it was all done and we were a vine free zone.

How do you see the almond industry changing over the next 10 to 20 years?

I see the industry "maturing" with a sizeable tonnage that will keep

the international buyers interested and satisfied that we can produce good quality almonds. Hopefully our marketers can command a premium to keep us in a comfortable lifestyle!

What do you see as the almond industry's biggest asset?

Apart for the ABA staff (Jo told me to say that!) I'd have to say a common vision to be profitable at all levels of the industry and work together to try to achieve this goal.

If you weren't involved with the almond industry, what do you think you'd like to do?

Never really thought about it.

If you were to invite three people to dinner (fictional, dead or alive) to brainstorm the future of the Australian almond industry, who would you invite and why?

Bill Gates - lateral thinker.

Kerry Packer - good entrepreneur.

Elle McPherson - wont help the industry but will help me!

Why is it important to you to be a member of the ABA?

To keep up to date with research, be represented by a Peak Industry Body to lobby government and network with other almond growers.

Just for Fun

I should have.....

Changed to growing almonds sooner, and said "no" to doing this profile!

I wish that I could.....

Get out of doing this profile!

The first thing I do when I get to work is.....

Check the email.

If you would like to nominate someone for a Grower Profile:

Please contact Jo Ireland at the ABA on 08 8582 2055 or email

jireland@australionalmonds.com.au

Training

Looking to the future



A student who had just been on a camp looking at cutting edge science in horticulture and agriculture, said at the end, "It has shown me how vast science is, also how science and thinking is involved in modern farming. It has made me more aware of what goes on and now I can appreciate the information I have learnt on this camp a lot more."

When asked to provide feedback on the PICSE GrowSmart Careers in Science programme, industry representatives said -

- "This programme has provided a significant return on our investment."
- "As an employer this gives us the opportunity to be exposed to some fantastic potential future employees."

A young man was asked at his Cert III in Production Horticulture graduation night, "What has this traineeship meant to you? After a long pause the reply came. "It has changed my life really."

This is the kind of comment we are receiving from our students and their employers.

GrowSmart Training (a registered training organisation), is keen to promote horticulture as an interesting and challenging career option through the programmes it runs.

- **The PICSE GrowSmart Careers in Science programme.** Designed to interest school students in science, encourage them to study science at University and consider a career in the horticulture industry in particular, but also in the broader perspective of primary industry. Strong links have been developed between industry, universities schools and local communities. This programme

is now part of a national programme called PICSE (Primary Industry Centre for Science Education) and has been strongly supported by the Almond Industry.

- **Training in production horticulture.** This includes traineeships, chainsaw, ChemCert Training, tree felling, OH&S or any other types of training required by industry. We are currently developing a pilot course of training to assist employees in the almond industry to move between production and processing during any one year, thus keeping the people with the required skills in the industry full time.

- More recently, GrowSmart Training has run courses in **Conservation and Land Management (CLM)** and has had considerable success training indigenous people both at Calperum near Renmark, and more recently at the Monarto Zoo near Adelaide. CLM will become more significant across horticultural and agricultural enterprises in the future.



Above and below: Brett Rosenzweig, ABA Technical Officer, with horticultural trainees at the Almond Trial Site in Loxton.



**Contact John Chase,
Manager, GrowSmart
Training for further
information, on:
08 8582 2270,
0419 848 672 or by
email on
jchase@rhctraining.com.au**

Latest Almond Statistics

2010 Almond Production

An initial forecast for the 2010 California almond crop of 694,000 tonnes (1.53 billion pounds) was released by the United States Department of Agriculture (USDA) on 6th May 2010. This figure represents an 8.5 percent increase over the previous year's production.

This estimate for 2010 is 5 percent below that of 2008, California's largest crop to date: 730,000 tonnes (1.61 billion pounds).

USDA further reported that despite a variable spring, weather in 2010 had few negative effects on the developing almond crop.

Australia's 2010 almond crop has previously been estimated at 46,100 tonnes (102 million pounds), a 25 percent increase above 2009 (36,500 tonnes).

Almond Sales

US almond shipments for 2009-2010, as reported by the Almond Board of California, are set for a record high, with shipment figures to date up by 15% over the prior year.

In Australia, domestic almond consumption increased by 10 percent in 2008/09. Over the same period Australia's almond exports grew by more than 60 percent to \$121 million.

Almond Plantings

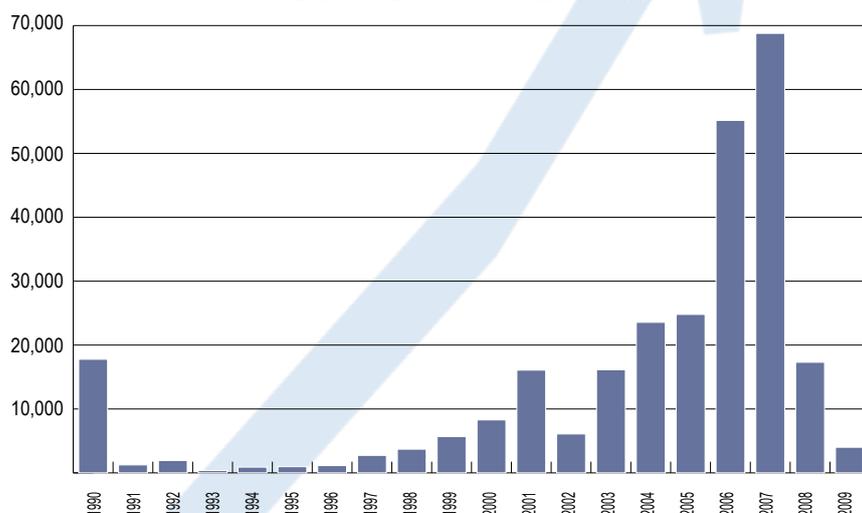
US almond acreage is now estimated at 810,000 acres (328,000 hectares), comprising 740,000 bearing acres (299,500 hectares). According to the Almond Board of California, an additional 150 million pounds (68,000 tonnes) is expected from this acreage, as younger trees mature.

Based on 2009 planting survey results, Australia's almond plantings are just under 28,000 hectares (69,000 acres). 2015 production is estimated to reach more than 80,000 tonnes by 2015, as plantings mature.

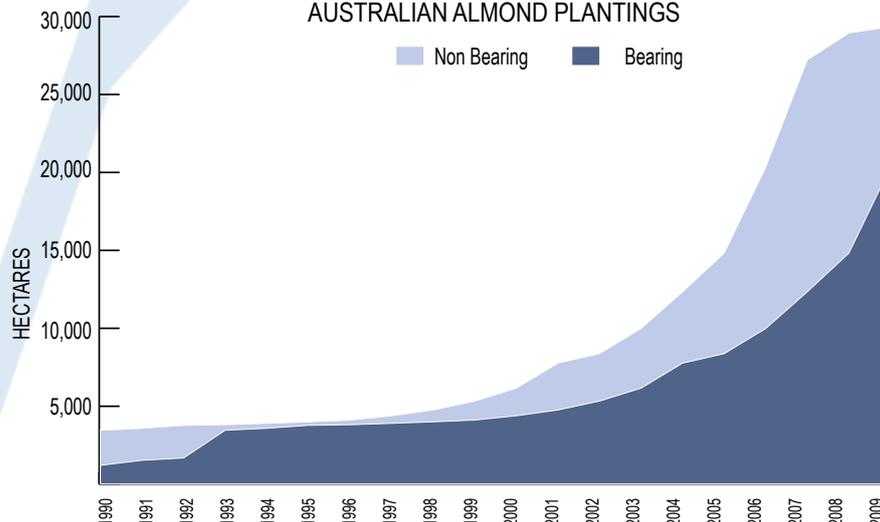
For further information visit:

www.australionalmonds.com.au/industry/industry-statistics to download the latest Australian Almond Statistics Report, or contact the ABA office for hard copies of this report

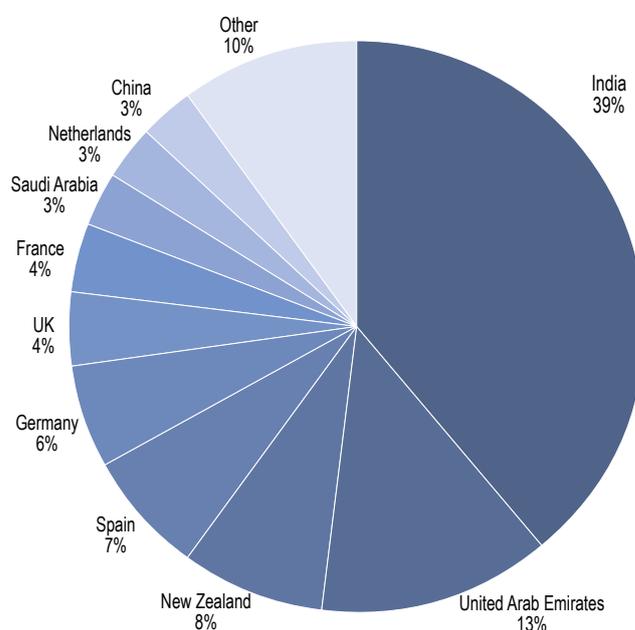
AGE DISTRIBUTION OF PLANTINGS



AUSTRALIAN ALMOND PLANTINGS



AUSTRALIAN ALMOND EXPORTS 2008/09





Introducing Australian Almonds to China

The ABA hosted a successful 10-day market study tour to China in May 2010, with a delegation of ten Australian representatives participating in this initiative.

Australian Almonds were exhibited at the SIAL China Food and Beverage Exhibition in Shanghai. SIAL China is China's largest international food, beverage and hospitality trade show. The exhibitor list included local producers, importers and distributors of international brands from mainland China as well as visitors from around the world with 20 international stands present.

Activities in mainland China commenced with a tour of the dried fruit and nut market in Guangzhou, providing an opportunity to view almonds being traded for distribution throughout China. This was followed by visits to a range of almond processing factories and trade meetings with almond importers and processors located nearby to Heshan, Guangdong.

The Chinese tour concluded with attendance at the XXIX World Nut & Dried Fruit Congress in Beijing, with a record breaking attendance of more than 850 delegates

The ABA gratefully acknowledges funding support provided from the South Australian Government and from HAL.

Major almond trade representatives in the region then attended a trade function dinner, where an update on the Australian Almond industry was presented. Attendees at this function were also invited to visit Australia during harvest in March 2011 to participate in an ABA hosted tour of the Australian almond industry, visiting almond orchards and processing facilities.



Dinner function in Heshan, Guangdong attended by Chinese and Australian almond trade representatives

Australian Almonds stand at SIAL China Food and Beverage Exhibition in Shanghai



International Nut Council (INC) Chairman, Jack Mariani presenting at the XXIX World Nut & Dried Fruit Congress, Beijing

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- Computerised product tracking and recording
- Catering for all producers, large and small

For enquiries contact
Wayne Francis:
Ph: 08 8595 8080
Mob: 0429 807 315
E-mail: wayne@laragon.com.au

Peach and Almond Scones

Ingredients

- 2 1/4 cups self raising flour, sifted
- 1 1/2 tablespoons caster sugar
- 25g cold reduced salt butter, chopped
- 3/4 cup skim milk
- 100g canned peaches in natural juice, drained and chopped
- 50g raw blanched almonds, roughly chopped
- 1 tablespoon skim milk, extra, for brushing

Instructions

Preheat oven to 220oC

Place the flour and sugar in a large bowl. Using your fingertips mix in the butter lightly, until the mixture resembles fine bread crumbs. Add the milk, peaches and almonds, mixing with a spatula until just combined.

Transfer the mixture to a lightly floured surface and press together into a round shape, approximately 3cm high. Using a 5cm diameter biscuit cutter, cut out rounds from the dough and place on a baking tray sprinkled with a little extra flour. Gather up the remaining dough, press together and repeat the process.

Brush the tops of each scone with milk. Bake for 15 minutes or until golden brown on top and hollow sounding when tapped.

Serve warm or at room temperature.

Makes approximately 12

Recipe courtesy of Nuts for Life www.nutsforlife.com.au

calender

June

1

ABA Board Meeting
Griffith, NSW

2

Riverina Growers Meeting &
Production Committee Meeting
Griffith NSW

4-6

Good Food & Wine Show
Melbourne Convention & Exhibition Centre
www.goodfoodshow.com.au

9-12

PMA Fresh Connections Conference
Melbourne Convention & Exhibition Centre
www.freshevent.com.au

8-10

Australian Irrigation Conference & Exhibition
Sydney Convention & Exhibition Centre
www.irrigationaustralia.com.au

11-27

ABA USA Study Tour
Californian Central Valley
www.australionalmonds.com.au/industry

July

16-18

Good Food & Wine Show
Sydney Convention & Exhibition Centre
www.goodfoodshow.com.au

October

27-29

Almond Industry Conference
"New Horizons", Mildura, Victoria
www.australionalmonds.com.au

March 2011

17

Australian Almond Marketing Forum
"Better with Almonds"
Sydney Marriott Hotel, Sydney, NSW
www.australionalmonds.com.au/forum



Australian Almond Conference 2010

27th - 29th October
Mildura, Victoria

Almond Board of Australia

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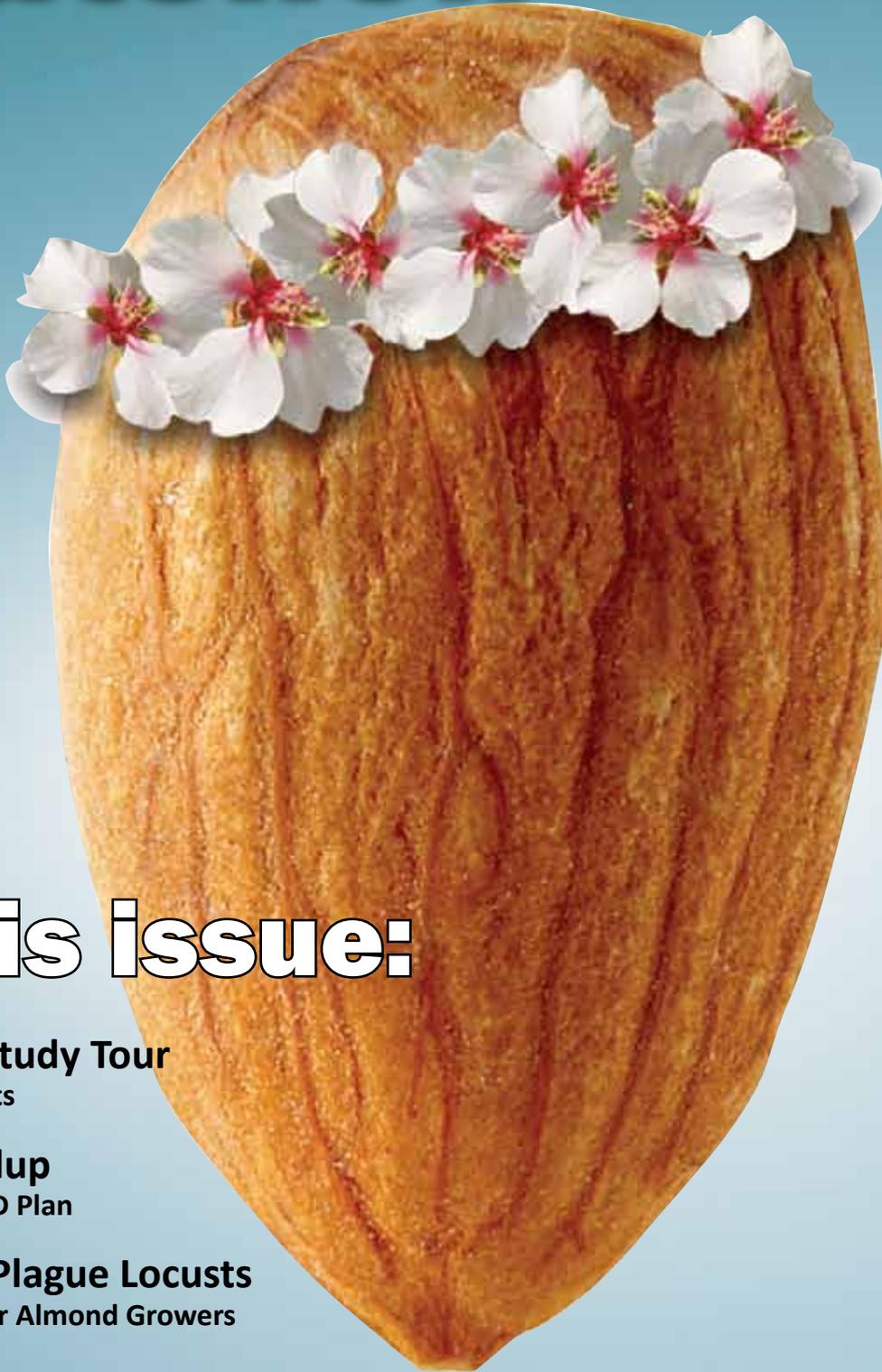


In A Nutshell

August 2010



ALMOND
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AUSTRALIA



In this issue:

2010 USA Study Tour

Trip Highlights

R&D Roundup

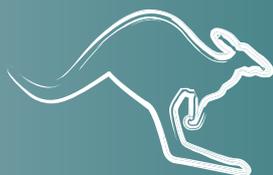
Strategic R&D Plan

Australian Plague Locusts

Key Points for Almond Growers

New Horizons

Australian Almond Conference 2010



AUSTRALIAN ALMONDS

www.australionalmonds.com.au



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16	Feature Recipe
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Memberships Due

A reminder that ABA memberships are now due, with 2010/11 fees as follows:

- Grower Member - Category A (equal to or less than 500Ha) - \$200 AUD
- Grower Member - Category B (greater than 500Ha) - \$500 AUD
- Marketer Member - \$500 AUD
- Associate Member - \$100 AUD
- Australian Nutgrower Subscription ONLY - \$80 AUD

Membership application forms are available from ABA office or www.australionalmonds.com.au



Edition	Advertising Deadline	Material Deadline
February	15th January	10th February
May	15th April	10th May
August	15th July	10th August
November	15th October	10th November

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development.

In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties. Please contact the Almond Board of Australia for current membership fees and inclusions.

Advertising/Editorial

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Some of these projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



CEO Update

by Julie Haslett



This issue comes during almond blossom season, an exciting and important time in the orchard.

Pollination takes place at this point in the growing cycle. Billions of bees are brought into orchards across our growing regions to undertake this critical function. This edition highlights some of the other key activities taking place in the orchard at this time of year.

Blossom season provides a major focal point for the ABA's consumer promotions program. In store promotions, public relations and online media have all be utilised to further raise awareness of the natural goodness of Australian grown almonds. This season is also celebrated through regional almond blossom festivals now being conducted in both Willunga, South Australia and in the Mallee region, Victoria.

With the imminent (but delayed) release of the draft Murray Darling Basin Plan, water will continue to be a critical issue for the almond industry to address in a range of ways. To further inform on this matter, Danny O'Brien CEO of the National Irrigators' Council (NIC) will be presenting at this year's Almond Conference being held in Mildura, 27-29 October.

Detailed information about the conference is enclosed in this issue, including an overview of the program and keynote speakers. If you haven't already registered, please do so to ensure that you don't miss this "must attend" event. I look forward to seeing you there!

A reminder that ABA Membership subscriptions for 2010/11 are now due. The ABA recently received very positive feedback from our survey of members. The information provided through this survey is now being used to assist future planning across the breadth of ABA activities. Thank you to all who provided evaluation responses and special thanks to our members for your continued support.

Almond Planting Survey - 2010 Update

Updated surveys should be returned to the Almond Board of Australia in the prepaid, confidential envelope by Friday, 24th September 2010.

Please do not hesitate to contact Bronte McCarthy if you have any questions relating to this survey email: bmccarthy@australionalmonds.com.au

2010 USA Study Tour

by Brett Rosenzweig

The Almond Board of Australia hosted a study tour of California from the 11th to 29th June. The aim of the study tour was primarily to give new, younger or first time travellers an insight into the Californian almond industry that they may not otherwise be able to experience. The study tour was well supported with twenty six people joining the tour and each of the four almond growing regions was well represented.

Once the jetlag subsided, with the help of some tourism activities in San Francisco and the Napa Valley, the study tour started at the top of the Central Valley at Chico. Here we met with John Edstrom who gave us an insight into sub-surface drip, deficit irrigation, organic and pruning trials conducted at Nickel's Soil Lab, a research facility at Arbuckle which is co-operatively run with UC Davis.



Australian Almond Delegation

Mike Perry from Lassen Land Co gave the group a tour of one of the properties he manages near Orland. He also demonstrated a new style of almond trellis / tree tie system that replaces the traditional wooden stake style of tree support and will show great promise for anyone considering new plantings in the Australian almond industry.

Valuable time was spent at the Weiss McNair, OMC, Jack Rabbit, Flory, Exact Corporation, Lectroblast and Air-O-Fan manufacturing plants observing the machinery options and how equipment is assembled before delivery to Australia. As usual, all the machinery manufacturers showed enormous hospitality and were all very eager to show us through their facilities.



Visit to Exact Corporation - Modesto CA

We spent an enjoyable and eye-opening day with Michael Miller from the state Department of Water Resources on a tour of the Sacramento Delta. Here we saw firsthand the competition between meeting environmental demands, meeting irrigator and urban water needs, and the maintenance work carried out on the Deltas levy system to enable farming to be conducted on land that is below sea level.



San Francisco

Time was also spent with researchers from UC Davis, getting updates on their latest projects. Presentations were given on deficit irrigation, light interception, replant diseases and almond modelling. There were also field visits with UC Davis extension officers, Blake Sanden and Roger Duncan, who showed us their pruning, tree spacing and irrigation management trials.

The group was able to gain an appreciation of the differences between Australian hullers and processors and our Californian counterparts. Visits were made to two of the largest processors in the state, being Blue Diamond and Paramount Farms - the size of their operations was hard to comprehend. A visit was also made to Monte Vista Farming with a tour through their operations.

In addition to this we were given a presentation by Richard Waycott and Julie Adams from the Almond Board of California. They gave us a warm welcome to California and a brief information session about the current state of the Californian almond industry.

A number of grower's properties were visited with Dan Cummings, Nick Bavaro, Greg Myers, Ed Kuykendall, Randy Bloemhoff and Paramount Farms all giving up their valuable time to show us around their properties and share their almond growing expertise with the group.

The group spent a morning at the Kern Water Bank where we were shown how water authorities in Kern County were managing their water supplies. It was interesting to see how the Kern Water Bank was taking water from the surrounding aqueduct and rivers during wet periods to recharge the underlying

aquifer, store the water and then recover the water for irrigation and urban uses during the dry period.

Visits were also made to Duarte's and Burchell's Nurseries. At Duarte's Nursery, John Duarte gave the group a detailed look at their in-vitro propagation of rootstocks and subsequent budding and growing of almond trees. At Burchell Nurseries, John Slaughter took us on a field trip to show the group examples of their exclusive varieties. He also gave us his thoughts on the optimal training, pruning and fertigation techniques that he has observed in the Californian industry.

Despite the hectic touring schedule, time was allowed for some sightseeing, reflection on what the group had observed and learnt. Aside from the time spent in San Francisco and the Napa Valley at the start of the study tour, a weekend was also spent at Bass Lake and Yosemite National Park and the final weekend was spent in Los Angeles before our departure back to Australia.

The study tour went very smoothly with all tour participants having an enjoyable and valuable trip. There are a number of people that made the study tour the success that it was. A big thank you must go to all of our Californian hosts who gave up their valuable time, freely exchanged information and showed immense hospitality to the tour group. Thank you also to the staff at Hastwell Travel and Insight Vacations for organising the airflights, accommodation, tour coach and on ground support for the duration of the tour. The last acknowledgment must go to HAL for their generous funding support of the study tour.



Visit to Nickels Soil Lab - Arbuckle CA

If you have any queries regarding the study trip, please contact:

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Industry Development Officer
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E: brosenzweig@australionalmonds.com.au



AUSTRALIAN PLAGUE LOCUSTS

BY BEN BROWN

Recently there has been a lot of publicity about a potential spring hatching of Australian Plague Locusts (APL), possibly the most severe hatchings in forty years.

The summer rains of last season produced a large growth in vegetation in the channel country and an initiation of a significant swarm of adult locusts. In autumn these locusts arrived in the Sunraysia and Riverland regions from south west Queensland, mid-west New South Wales and north east South Australia. On arrival they laid eggs which have the potential to produce a spring outbreak from mid to late September, the exact timing dependent upon weather temperatures and degree days. Expected dates and severity will become more accurate closer to spring.

Key Points for Almond Growers

Plan ahead. Do not underestimate the damage from either hoppers or adult locusts in perennial horticulture, annual crops or pastures:

- Eggs laid in autumn will produce a generation of **high density nymphs** in spring, but if effectively controlled the population can be decreased and damage minimised.

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- It is this **early stage of hatchings that are recommended for control**, specifically the second and third instars (hoppers) which band together and are easily controlled before they develop their wings and develop into adults.
- **Ground application of chemicals should occur via weedicide booms or knapsacks targeting hoppers** and under no exception should there be spraying of these chemicals into the almond trees.
- **Hatchings should occur after the almond pollination period** and the removal of beehives. However, if there are small and isolated earlier hatchings of locusts spraying is not to target bees and your beekeeper needs to be notified for further arrangements.
- **Coordinated approach.** Locusts know no boundaries. There are three levels of locust control – strategic interstate (Australian Plague Locust Commission), state level (state departments) and local (landholders). Effective control on all three levels is vital to widespread plague containment.
- **Be vigilant.** Look for hatchings from early spring. Check the APLC website regularly for updates to the forecast hatching dates for your region.
- **Report outbreaks.** All locust outbreaks, be they adult swarms or hatching nymphs, should be reported immediately to authorities. If after assessing the risk of outbreak on your property you are concerned at how you will manage it, please seek assistance from the authorities.
- **Landholders have obligations** under state legislation to report and/or control locusts on their property. If you are unsure of your obligations, please check your state agency's website or contact their hotline.
- **Insecticides must be approved for locust control by the Australian Pesticides and Veterinary Medicines Authority (APVMA).**
- **The chemicals used for APL control are very toxic to humans** (except metharizium) and full personal protective equipment (PPE) as per label directions should be worn during the spraying operations
- The **almond industry currently has no insecticides permitted or registered** for the control of locusts, but the ABA is currently applying for Minor Use Permits for a range of chemicals suitable for control. It is expected that permits will be ready by the end of August, at which time processor/marketers will be better able to advise appropriate action. **Please ensure that you consult with your relevant processor/marketer prior to undertaking control measures.**
- **You must observe withholding periods (WHPs)** following the use of any registered or permitted chemicals to control locusts. Note: all producers need to be aware of Maximum Residue Levels (MRLs) and must follow the label instructions.

IDENTIFICATION, FACTS & CONTACTS

Predicted Hatching Dates by Region as of 16 August 2010

Dates will become more accurate closer to spring, so check updates on the APLC website
<http://www.daff.gov.au/animal-plant-health/locusts/current#hatchtable>

	Hatching	Mid-instar	Fledging
NSW			
Brewarrina-Bourke	22 August	7 September	17 October
Hay - Balranald	26 September	11 October	31 October
Narrandera - Griffith	5 October	19 October	6 November
VICTORIA			
Mildura - Ouyen	25 September	10 October	31 October
Swan Hill - Boort	6 October	19 October	10 November
SOUTH AUSTRALIA			
Renmark - Morgan	26 September	10 October	24 October

Source: Australian Plague Locust Commission (<http://www.daff.gov.au/animal-plant-health/locusts/current#hatchtable>)



Description

Adults

Adults of the Australian plague locust can be readily distinguished from other species by the large dark spot on the tip of the hindwings and distinctive scarlet hindleg shanks. Adult body colour is variable and can be grey, brown or green. Adult males measure 25-30 mm long while females are 30-42 mm long.



Adult Australian plague locust



Dark spot on locust hindwing

Nymphs

The nymphs have five growth stages or instars.



Fifth instar Australian plague locust nymph

First instar nymphs are about 3mm long, pale brown to dark brown or black, and sometimes have a white stripe along the back of its first body segment just behind the head. At each stage the developing wings become more noticeable and can be used to determine which instar a locust nymph is in. Later instars are grey or brown and sometimes have a white stripe along the back.

For Further Information or to report outbreaks:

New South Wales

All outbreaks must be reported to your local Livestock Health and Pest Authority (LHPA) office. For further information visit the LHPA website at www.lhpa.org.au, or the Industry and Investment NSW – Primary Industries website at www.dpi.nsw.gov.au/agriculture/pests-weeds/insects/general/locusts or phone the I&I NSW Plague Locust Hotline 1800 814 647.

South Australia

Locust activity in South Australia should be reported to your nearest Primary Industries and Resources operating base (after September 1), Loxton T: 1800 833 451 For more information in SA go to www.pir.sa.gov.au/locust

Victoria

All outbreaks in Victoria should be reported to the DPI Victoria Locust Hotline, 1300 135 559. For further information in Victoria, go to www.dpi.vic.gov.au/locusts or contact your local DPI Victoria office.

References

- Australian Plague Locust Commission. <http://www.daff.gov.au/animal-plant-health/locusts/current#situation>
- Henry, K. 2010. *The Australian Plague Locust Factsheet*. Government of South Australia, Primary Industries and Resources SA.
- Plague Locust Control Fact Sheet. August 2010. Australian Plague Locust Commission (APLC) and Grains Research and Development Corporation (GRDC).



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Australian Almond Conference 2010

27th - 29th October Mildura, Victoria

The Almond Board of Australia is pleased to present the 2010 Australian Almond Industry Conference 'New Horizons' being held Wednesday, 27th October to Friday, 29th October in Mildura, Victoria.

This Annual Almond Conference is the premier event for the Australian almond industry, bringing together approximately 200 delegates from all facets of the industry including growers, processors, marketers, researchers and industry suppliers.

Earlybird registration has been extended until the end of August, so register now and save! To register go to:

www.australionalmonds.com.au/industry/conference_2010

Due to overwhelming support from past sponsors and exhibitors, only limited sponsorship opportunities remain.

For further information about registration or sponsorship, please contact Jo Ireland - Communications Coordinator at the ABA office or email: jireland@australionalmonds.com.au

Social Program



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Welcome Reception

'PV Mundoo'

27th October

Join us for an evening dinner cruise on the Paddle Vessel Mundoo. Built in 1987 at Goolwa, South Australia - a steel hull construction, 34.9 metre long paddleboat, featuring attractive quality timber ceilings and bar facilities. This twilight cruise will depart the Mildura Wharf at 7pm SHARP and cruise upstream from Mildura. Live entertainment will be provided giving delegates the opportunity to sit back and enjoy the tranquil floodlit river banks created by the PV Mundoo's powerful floodlights.



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Golf Day

Wentworth Golf Club

27th October

Enjoy a memorable day of golf teeing off at 11am with fellow delegates in an ambrose style competition at the beautiful Wentworth Golf Club. The course boasts lush fairways between stands of large river gums, whilst tree-lined fairways wind their way around eight lakes, coming into play on nine of the course's holes. Tackle tricky bent grass greens, subtle contours and a true surface that will always reward a good putt.



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Conference Dinner

The Setts Bar & Function Centre

28th October

Don't miss the Annual Conference Dinner conference, commencing with a Sponsors Drinks session at 6:30pm, for 7pm dinner. This social evening is a chance to network with other conference delegates in a relaxed atmosphere. Dinner tickets are included with full registration prices, and extra tickets are also available. Partners are very welcome.

Be sure to attend the Conference dinner - it will be an evening to remember!



Australian Almond Conference 2010 Preliminary Program

Wednesday, 27th October

11.00am	Social Golf Day (registered participants only) & 19th Hole	Golf Sponsored by:		19th Hole Sponsored by:	
7.00pm	Welcome Reception - Paddle Boat Dinner Cruise	Sponsored by:			

Thursday, 28th October

8.00am	Registrations & Trade Exhibitions		
9.00am	Almond Board of Australia AGM		
10.00am	Official Conference Opening		
10.30am	Morning Tea & Trade Exhibition	Sponsored by:	
11.00am	Annual Levy Payers Meeting	Sponsored by:	
12.00noon	Lunch & Trade Exhibition		
1.00pm	Almond Research & Development Highlights	Sponsored by:	
2.30pm	Afternoon Tea & Trade Exhibition		
3.00pm	Irrigation: Efficiency & Nutrition Spotlight	Sponsored by:	
5.00pm	Day Close		
6.30pm	Pre Dinner Sponsor Drinks	Sponsored by:	
7.00pm	Annual Almond Conference Dinner		

Friday, 29th October

8.00am	Tea & Coffee, Trade Exhibition		
9.00am	Promoting Australian Almonds	Sponsored by:	
10.30am	Morning Tea & Trade Exhibition		
11.00am	Almond Industry Perspectives	Sponsored by:	
12.30pm	Lunch & Trade Exhibition		
1.00pm	Bus Departs for Lake Cullulleraine Orchard Visit		
3.15pm	Afternoon Tea		
3.45pm	Bus departs from Lake Cullulleraine for airport and hotel drop-off		

The Conference Organisers reserve the right to amend this program at any time, please visit www.australionalmonds.com.au/industry/conference_2010 for updated program details



Keynote Speakers



Stefano de Pieri
Celebrity Australian Chef

The gastronome from Mildura, and Australian almond ambassador, who calls himself a cook (not a chef) is famous for his cooking. As host of the acclaimed TV series *A Gondola on the Murray*, author of four culinary books, and the genius behind one of the country's greatest regional restaurants, it might be assumed that he is all-consuming by the world of food. He isn't.

Stefano created a restaurant – from a dingy cellar basement and transformed it in to the best regional restaurant in Victoria. His business success emulates his life experience of coming from Italy with his brother in 1974 and a suitcase, to becoming one of the most well known cooks in Australia. His restaurant has become the gastronomic epicentre of Australia, and winner of many awards including the prestigious the *Age Good Food Guide* restaurant of the year award.

Stefano has also created a range of beers (Mildura Brewery – available through Dan Murphy's nationally) and wine (Stefano's available nationally through Cellarmasters), made with grapes sourced in Mildura and various other locations, like the Clare, King and Barossa Valleys, the range having two objectives: to be affordable and to be suitable for food.

Also involved in the arts, Stefano established the Mildura arts festival and has been chair of the Australian Alternative Varieties Wine Show, the most successful new wine show in Australia.

"I'm interested in the relationship between food and the environment because I believe that the two are intimately connected." Stefano also promotes a constant philosophy on quality of product and service.



Danny O'Brien
CEO - National Irrigators Council

Danny O'Brien was appointed CEO of the National Irrigators' Council in July 2009. A former journalist, he comes to the NIC with a background in public affairs, politics and government, having worked for MPs in Victoria and as a Senior Adviser for a Deputy Prime Minister. He is based in Canberra.



Sara Grafenauer
Accredited Practising Dietitian &
Nutrition Lecturer
University of Wollongong

Sara is an Accredited Practising Dietitian of 13 years. She is a graduate and academic at the University of Wollongong and consults specifically to the food industry. Sara's research interest is in the area of satiety signaling and functional foods. She has a passion for food, cooking and naturally, she loves almonds!



Darren Lehmann
Australian Cricketing Legend

From the time he burst on to the scene at age 17, Darren has amassed a huge amount of runs but only ever been rewarded by the national selectors with a One-Day international place. Darren is also a useful slow left-arm bowler with a knack of picking up important wickets. He is a powerful attacking batter and loves to despatch the ball to all corners of the ground, he is also great at manufacturing shots when the bowlers are giving little away.

Lehmann's talents won him regular opportunities in Australia's one-day international team, particularly during the late 1990s, and on the restructuring of the country's limited-overs squad in early 2002. In 1999 he had the honour of hitting the winning runs in the 1999 World Cup final against Pakistan at Lord's, and was a key member of the side that defended the title four years later. On the domestic front he was no less effective, and was an integral member of winning Sheffield Shield sides in 1990-91 and 1995-96 and Yorkshire's victorious County Championship team of 2001. He is now the leading run scorer in Sheffield Shield/Pura Cup history and showed his desire had not waned in 2005-06 by piling up 1168 runs at 89.84. The peak came during a career-best 301 against Western Australia at the Adelaide Oval, an innings that ended with 116 from 87 balls in the second session.

He has a sharp cricket mind and is genuinely likeable, and now works closely with the South Australian Cricket Association to provide aspiring cricketers with the opportunity to develop their game at the Darren Lehmann Cricket Academy, giving young players the unique opportunity to undertake intense training at the world renowned Adelaide Oval and hone their cricket skills in Australian conditions.

For program updates and more speaker profiles please visit
www.australianalmonds.com.au

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In The Orchard...

by Brett Rosenzweig

The first three months of the almond growing season is the busiest and most important time of the year.

From the moment the buds begin to swell in early August until pit hardening in early / mid October, the orchard is abuzz with rapidly changing phenology. Careful observations and correct timing in the orchard now could have beneficial results later at harvest time. Whilst the kernel has not begun to develop prior to pit hardening, the potential kernel size is determined and negatively influenced by any stresses on the tree. The following is a list of things that should be considered over the next three months:

- Dormant oils sprays should have already been completed.
 - Pre-season irrigations should have already been applied to ensure good soil moisture conditions prior to bud burst. Pay careful attention to sub soil moisture levels as the current winter rainfall may not have been adequate to maintain subsoil moisture. Dig a hole or check soil moisture monitoring equipment!
 - Consider your spring weed control program before bee hives start arriving in the orchard to reduce the need to weedicide while bees are in the orchard and remove any competing pollen and nectar source.
 - Consider any orchard operations that may impact on bee activity. Take care not to engage in any activities that will detrimentally affect bee hive strength e.g. spraying Glyphosate near hives. If needed, check hives on a regular basis to keep an eye on bee activity.
 - Apply a boron foliar spray of Solubor (2.5 Kg/1000L) at late bud swell / early pink bud to assist fruit set.
 - Copper should be applied at early pink bud stage for bacterial and fungal protection.
 - Second boron foliar spray using boric acid (100g/1000L) can be applied mid to late bloom for improved fruit set.
 - Full bloom fungicide for Blossom Blight and Brown Rot, e.g. Iprodione.
 - Shuck fall fungicide using a registered group Y fungicide for Brown Rot and Rust, e.g. Mancozeb or Chlorothalonil.
- Monitor for Black Peach Aphid on flowers and emerging shoots. Any previously affected areas may be a problem again this year.
 - Monitor for European Earwigs which attack flowers and newly emerging shoot growth. Check underneath leaf matter or soil at the base of the tree trunk, underneath the drip hose at the end of the rows and tree guards of young trees. Any previously affected areas may be a problem again this year.
 - Foliar nutrition should start once adequate canopy cover is present. Foliar nutrition is important to improve leaf size, fruit size and maximise shoot and fruit elongation. Foliar nutrition is especially important to 'force-feed' critical nutrients during cooler conditions when water and soil nutrient uptake is minimal and slow.
 - Keep an eye on Bryobia Mite (Brown Mite) during September. Juveniles generally hatch in the first two weeks of September and this period will be an important part of your pest monitoring program. Check for the presence

and severity of juvenile numbers to determine if control is required or not.

- During the cooler months, it is better to fertigate using ammonium or nitrate based sources of nitrogen (e.g. ammonium nitrate, liquid ammonium nitrate, potassium nitrate, calcium nitrate, MAP, etc). These will provide optimal uptake of nitrogen when the soil temperatures are below 18oC measured at 10 to 20cm in depth. Do not use urea or UAN below 18oC. When soil temperatures consistently exceed 18oC, Urea and UAN fertilisers may be used. Remember to check with manufacturers for compatibility when mixed multiple products together.

For further information contact:

*Brett Rosenzweig
Industry Development Officer
Almond Board of Australia
P 08 8582 2055 or 0429 837 137*

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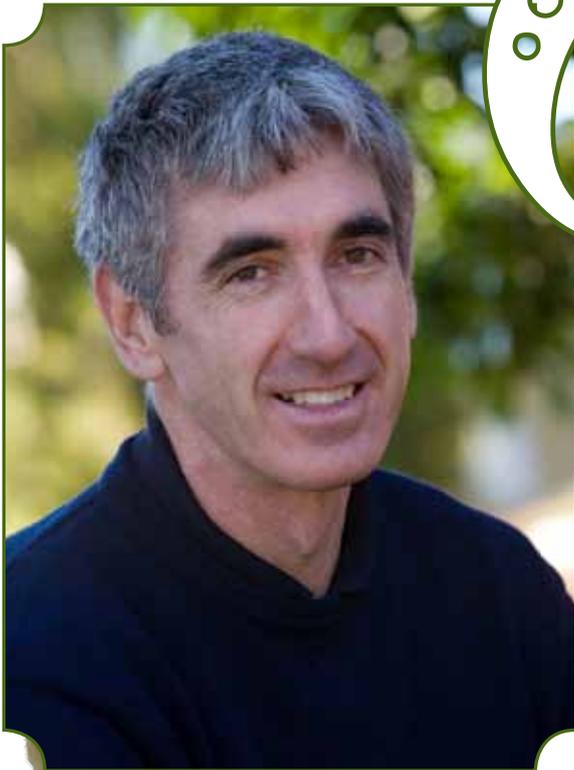
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Grower Profile

Tim Millen

**Group Horticultural Manager, Almond Division
- Select Harvests**

Favourite Quote:

"Be a good listener, your ears never get you into trouble"

Education/Training:

Secondary – St Patrick Wellington New Zealand

Massey Uni –Palmerston North, NZ- Diploma of Horticulture- Distinction

Orchard/s:

19 orchards Select Harvests & Investors

18 in the Robinvale VIC

1 North of Perth WA

Varieties Grown:

Non Parel, (some still call it Californian Paper Shell), Carmel, Price, a few Baxendale, Mission, Peerless, Ne Plus & Monterey

Employment history in the almond industry:

Have been with Select Harvests for 14 years.

Select Harvests Group Horticultural Manager – Almond Division

Managing with a great team across all aspect of the 41,500 acres, from Nursery to stockpad.

How do you see the almond industry changing over the next 10 to 20 years?

I see new rootstocks increasing yields with potentially less inputs, replanting with new varieties as orchards age, and I see the main challenge being to maintain high standards of almond quality post harvest – from orchard floor to processor.

What do you see as the almond industry's biggest asset?

The people involved, and 'Mother Nature'.

If you weren't involved with the almond industry, what do you think you'd like to do?

Overseas volunteer helping others with my skills.

If you were to invite three people to dinner (fictional, dead or alive) to brainstorm the future of the Australian almond industry, who would you invite and why?

A bee keeper, fertiliser salesperson and a US Almond Trader. Once we were all seated, would leave the table and ask them to meet me at the bar when they'd worked it all out. Costs & price.

Why is it important to you to be a member of the ABA?

To be involved, stay in touch with other growers, to be part of a greater team, make friends, opportunities, learn, contribute, assist other growers & stake holders.

Just for Fun

I should have....
been an All Black.

I wish that I could....
Wish for NO rain during harvest!! Please!!

The first thing I do when I get to work is....
Turn the light on.

If you would like to nominate someone for a Grower Profile:

Please contact Jo Ireland at the ABA on 08 8582 2055 or email

jireland@australionalmonds.com.au

R & D Roundup

by Ben Brown

Strategic R&D Plan

Due to strong growth in the industry over the past few years, Australian almond production is predicted to increase to more than 80,000 tonnes by 2015. Associated with this growth in production will be an increase in R&D levy collection. Over the next 5 years, the Australian almond industry, the Commonwealth government and other funding partners are likely to invest between \$10 - 15 million in R&D for the industry.

This substantial amount of money provides a major resource with which to drive the development and world competitiveness of our industry. It is critical that it is invested wisely.

Accordingly, a new R&D investment plan - the Almond Industry R&D Strategic Plan 2011-2016, is needed to prioritise investments of statutory levy funds, industry voluntary contribution funds and matching federal funds, in almond R&D.

The process of developing this plan started in May 2010, with a two day workshop in

Mildura with representation from growers, researchers, service providers, processors and marketers. Following the completion of the workshop, the industry's Vision, Mission, Objectives, Strategies and Actions were developed and the plan will now provide a platform from which further detail will evolve.

The next six months will involve a consultation period at grower meetings industry strategic committee meetings, and the IAC meeting. The R&D objectives and strategies will be justified and prioritised with an emphasis placed on an analytical business case. The process will involve rigour and comparison between competing research investment areas using both subjective and objective tools. The R&D objectives and strategies will be ranked based on urgency, importance, impact and likelihood of success and then the potential benefit assessed in relation to the expected costs. The end result will be an expected Net Present Value figure and a Benefit Cost Ratio figure for a specific project investment.

The IAC and the Strategic Committee's will ensure the investment portfolio reflects both the industry's priorities and the Australian Federal Government's Rural Research and Development priorities.

The plan will allow all stakeholders to look forward and to investigate the next generation of production, processing and marketing technologies that will ensure Australia retains its position as a preferred supplier of high quality, value for money almonds, produced in risk minimizing, cost competitive sustainable production systems.

For further information contact:

Ben Brown

Industry Liaison Manager

Almond Board of Australia

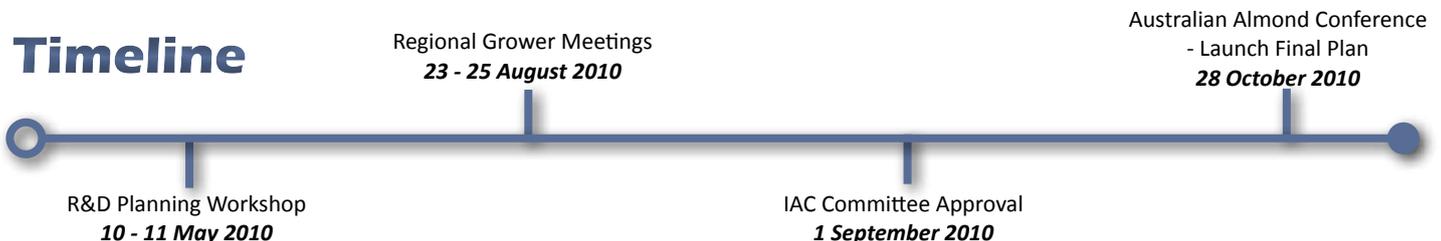
P 08 8582 2055 or 0447 447 223

E: bbrown@australionalmonds.com.au

Strategic Plan - Draft Framework



Timeline



Nuts for Life



www.nutsforlife.com.au

Follow us on twitter

Market research results

Consumer Insights has once again undertaken our biannual market research tracking study to ensure Nuts for Life is achieving its goals of increasing the nut health knowledge of health professionals and to monitor the consumer opinion of nuts.

Health professional study

435 health professionals (just over 100 of each: GPs, dietitians, fitness leaders and naturopaths) completed the online survey in January 2010.

GPs continue to gain knowledge and show increased awareness of the health benefits of regular nut consumption particularly in the areas of cholesterol/ heart disease and diabetes. They are still confused about the role of nuts in weight management given nuts high fat content. They are also aware of the repetitive message to "eat less fat" and the importance of replacing with low fat varieties.

The nuts they recommend to patients in descending order are: Mixed nuts> walnuts> almonds> macadamias> Brazil nuts, cashews, none> peanut, pecan, pistachio> hazelnut> pine nuts> chestnuts

GPs are more likely to tell patients nuts are OK when asked then raise the issue with patients.

Dietitians

Dietitians are better informed however they do have reservations about nuts and weight management.

The nuts they recommend to patients in descending order are: Mixed nut> almond> walnut> pecan> macadamia> cashew> peanut> Brazil nut> pistachio> hazelnut> pine nut> chestnut> none.

The majority of dietitians are more likely to raise the issue of eating nuts with clients and specifically recommending them.

Consumer study

222 consumers, (equal males and females) completed the online survey in January 2010. While these numbers are small a tracking study helps to understand consumer sentiment.

- Consumer who eat nuts more frequently than once a month has dropped from 67% in 2008 to 63% in 2010, however those that don't eat nuts at all has remained steady at 12-13%. Of those that eat nuts 42% report eating a 30g handful. Consumers don't seem to recognise nuts as an everyday food and are concerned about the fat content and weight gain.

- 38% said a healthy professional had recommended they eat a handful of nuts daily.
- The most common occasions to eat nuts are at parties> on planes> pre-dinner with a drink> afternoon tea> at work desk> watching TV> morning tea.
- The common 3 nuts to snack on were cashews, mixed nuts and peanuts.
- 91% of consumers said their consumption of nuts had gone up or stayed the same in the last year with the number eating less going down.
- 96% said their frequency of cooking with nuts had increased or stayed the same in the last year
- Consumers are clearly confused when it comes to eating nuts regularly and the impact this has on weight. Interestingly their knowledge of the effect of nuts on cholesterol, heart disease, weight and diabetes is increasing.
- 46% said nuts were as healthy as fruits and vegetables, 37% didn't know and 17% said no.
- 43% said nuts were a 'superfood', 38% unsure and 19% said no.
- Sources of information continue to be magazines and newspapers although the internet continues to grow.

In general nuts are a high fat food in a fat phobic world. Better education of the role healthy fats play in the diet is needed with an emphasis on how nuts can be eaten in a weight management diet. Those that "don't know" are in a position to move to a more positive place with more education. This is an opportunity for Nuts for Life.

Consumer PR program

Porter Novelli have again outdone themselves with the achievements to date for the consumer PR program.

- 5 of 7 media releases have been distributed to date on topics such as: weight management with a 7 day meal plan, Coeliac Disease/gluten free, nuts as superfoods, 10 days 10 nuts, healthy heart for heart week
- Our 2 Tweets a day Twitter program is being followed by 205 people who are in turn followed by just under 300,000 people. We too are following about 320 other health professionals and health professional organizations and foodies.
- Nuts for Life has sponsored another Arbor Nutrition newsletter on nuts

which is distributed to 15,000 health professionals around Australia and New Zealand

- NutENews is now being distributed to 1220 subscribers quarterly and has been rated as a good explain of an email newsletter by Catherine Saxelby at the DAA National Conference
- Nuts for Life website polls – every couple of months the polls on the website change take a look and respond. Stats from these are used in Twitter and NutEBytes.

To date this has resulted in 205 media articles (around 30% in long lead magazine media) and we have another two months of the program to go. Our key messages of a handful a day and 2+5+a handful have been well utilized by journo.

Contributors staff education meetings

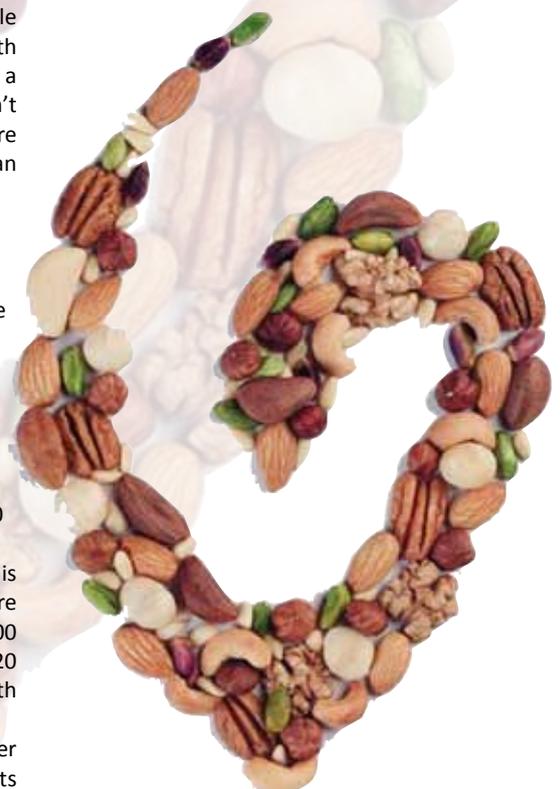
Around 60 staff members of Nuts for Life Contributor Companies have attended a Nut Myth Busting workshop conducted by Lisa Yates. All of Queensland and Northern NSW and some of Melbourne has been covered. Lisa plans to get to Adelaide and the remaining Melbourne companies in July/August 2010. Lisa will be in contact with those companies shortly.

Lisa Yates

Program Manager and Dietitian
Nuts for Life

Ph 02 9460 0111

Email admin@nutsforlife.com.au





Smoked Trout & Almond Salad

This easy-to-assemble salad is sweet and tasty, big on flavour and makes a great light lunch or supper.

Serves 4

Ingredients

- Mixed lettuce leaves
- 6 roma tomatoes, sliced
- 2 tablespoons capers, rinsed
- 350g smoked trout
- 100g whole almonds

Dressing

- 3/4 cup apple vinegar
- 2 tablespoons mustard oil
- 2 tablespoons sweet chilli sauce
- 50g flakes almonds, toasted

Method

Place the salad ingredients into serving bowls. Combine the dressing ingredients in a cruet or screw topped jar; shake or whisk to combine; toss salad with dressing before serving.

Calendar

August

31
ABA Board Meeting
ABA Office, Berri, SA

September

1
Industry Advisory Committee Meeting
ABA Office, Berri, SA

13 - 16
Fine Foods Australia Exhibition
Melbourne Convention & Exhibition
Centre
www.finefoodaustralia.com.au

October

27-29
Almond Industry Conference
"New Horizons", Mildura, Victoria
www.australionalmonds.com.au

November

12 - 14
GPCE Melbourne
Melbourne Convention & Exhibition
Centre
www.gpce.com.au

March 2011

17
Australian Almond Marketing Forum
"Better with Almonds"
Sydney Marriott Hotel, Sydney, NSW
www.australionalmonds.com.au/forum



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ABA office for more details

In A Nutshell

November 2010



ALMOND
BOARD OF
AUSTRALIA



In this issue:

Almond Marketing

Program Update

Don't Be A Drifter

Spray Workshops

New Horizons

Almond Conference 2010 Wrapup



AUSTRALIAN ALMONDS
www.australionalmonds.com.au



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- 7 Marketing Program Update
- 8 - 10 Australian Almond Conference 2010
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- 13 Grower Profile - Tim Orr
- 14 Almond Skill Set Course
- 15 Don't be a Drifter - Spray Workshops



CEO Update by Ross Skinner



Please Note
The Almond Board of Australia Office will be closed from:
12pm, Friday 24th December
and re-opens on
Tuesday 4th January

Edition	Advertising Deadline	Material Deadline
February	15th January	10th February
May	15th April	10th May
August	15th July	10th August
November	15th October	10th November

In a Nutshell

The Almond Board of Australia is the peak industry body representing the interest of almond growers, processors and marketers in Australia in matters of national importance including regulation, legislation, marketing research and development. In a Nutshell is published quarterly by the ABA in February, May, August and November to bring news to all industry contacts and members.

Membership

The Almond Board of Australia offers membership to growers, processors, marketers and interested parties. Please contact the Almond Board of Australia for current membership fees and inclusions.

Advertising/Editorial

The Almond Board of Australia acknowledges contributions made by private enterprise through placement of advertisements in this publication. Any advertising and/or editorial

supplied to this publication does not necessarily reflect the views of the Almond Board of Australia and unless otherwise specified, no products and/or services are endorsed by this organisation.

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Some of these projects were facilitated by HAL in partnership with the Almond Board of Australia. They were funded by the R&D levy and/or voluntary contributions from industry. The Australian Government provides matched funding for all HAL's R&D activities.



Almond Board of Australia Board Members

Director	Position
Brendan Sidhu	Chairman & Riverland Grower Representative
Neale Bennett	Deputy Chair & Sunraysia Grower Representative
Domenic Cavallaro	Adelaide Grower Representative
Grant Birrell	Marketing Representative
Tim Millen	Marketing Representative
Brenton Woolston	Marketing Representative
Tony Spiers	Riverland Grower Representative
Denis Dinicola	Riverina Grower Representative
Tim Orr	Sunraysia Grower Representative



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The Pollination Program



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Making the most of pollination to boost agricultural production

Help is on its way for Australian agriculture, which is threatened by a blood-sucking mite likely to devastate wild populations of escaped European honeybees and attack commercial hives if it arrives on our shores.

An estimated 65 per cent of agricultural production in Australia relies on honeybees for pollination, yet there is little awareness of its importance because of the incredible job done by wild honeybees.

A pollination manual is being written to provide practical advice for Australian and New Zealand beekeepers and the many growers reliant on them for crop production.

The manual is being prepared under the Pollination Program, a research and development strategy jointly funded by the Rural Industries Research and Development Corporation (RIRDC), Horticulture Australia Limited (HAL) and the Australian Government.

The manual is being written by the NZ Institute for Plant and Food Research Ltd. Lead author and pollination researcher Dr Mark Godwin says it will

provide background information on the importance of pollination and the basics of plant flowering for specific crops and the pollination process.

The manual will then outline how best to manage both bees and these crops for pollination, to get the best outcomes in terms of fruit production. There will be separate sections on each of the main crops reliant on pollination providing more specific information.

"The idea of the manual is to give straightforward information that readers can readily apply. It is being written in plain language that will clearly lay out the relationship between bees and their crops and how growers can best manage that relationship to ensure good crop outcomes and maintain healthy bee populations," Dr Goodwin said.

Gerald Martin, Chairman of the Pollination R&D Advisory Committee, says it's essential to optimise pollination and promote good pollination practices.

"A recent Pollination Program report, *Pollination Aware*, points out that a heavy reliance on incidental pollination means the yield and quality of produce is often not reaching its potential. However, growers will only pay for services if they are cost-effective," Mr Martin said.

"The best outcomes will be achieved through proper preparation of both the bees and the crops, and that is where the manual will be invaluable.

"The more demand there is for paid pollination and the greater the returns for beekeepers, the more the industry will expand. This in turn will protect agricultural and horticultural industries against the impact on wild bees of an incursion of *Varroa* mite.

"This parasitic pest has already devastated honeybee populations around the world and scientists say it's only a matter of time before it reaches Australian shores. It has already reached New Zealand," Mr Martin said.

The manual is expected to be available in 2011.

**For more information contact:
Kaaren Latham, 02 8204 3852; 0409 809 909**

The Pollination Program is a jointly funded partnership with the Rural Industries Research and Development Corporation (RIRDC), Horticulture Australia Limited (HAL) and the Australian Government Department of Agriculture, Fisheries and Forestry (DAFF). The Pollination Program is managed by RIRDC and aims to secure the pollination of Australia's horticultural and agricultural crops into the future on a sustainable and profitable basis. Research and development in this program is primarily to raise awareness to protect pollination in Australia.

RIRDC funds for the program are provided by the Honeybee Program, with industry levies matched by funds provided by the Australian Government. Funding from HAL for the program is from the apple and pear, almond, avocado, cherry, vegetable and summerfruit levies and voluntary contributions from the dried prune and melon industries, with matched funds from the Australian Government.

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Annual Report

Due to timing we were unable to organise our usual contributors annual meeting this year but a thorough review of our activities during this time can be found in the Nuts for Life 2009/10 Annual Report available on the Nuts for Life website (www.nutsforlife.com.au) in the Contributors Resources section under Submissions and Reports.

Summary:

The Nuts for Life campaign for 2009/10 continued to deliver results for the Australian Nut Industry. Since 2004 Nuts for Life:

- Made 15 submissions to FSANZ and other government/ public health agencies
- Participated in 60 health professional conferences reaching ~39,990 health professionals
- Developed and distributed 157,000 Nuts for Life printed resources
- Distributed 33,000 GP requests for resources through Samples Plus
- Responded to over 800 phone, email and website inquiries from consumers, health professionals, media and industry
- Generated 835 media articles generating ~184million impressions based on circulation figures
- Generated ~89,000 unique visitors to the Nuts for Life website with 3.7 million hits
- Total expenditure over this time has been ~\$1.9 million dollars
- Nut sales have continued to grow at around 4.5-5% pa.

Regulatory Affairs program

FSANZ Update

The substantiation of general level health claims (GLHCs) e.g. "Nuts are a heart healthy food" has been a point of contention for many FSANZ stakeholders. State jurisdictions were concerned about who would evaluate, enforce and pay for the substantiation, consumers and public health were concerned about truth in claims and thorough substantiation and industry was concerned about the process of substantiation, clarity in the foods standards code while still allowing innovation.

FSANZ believe they have come up with the solution which has four parts.

Step 1 – Food businesses would develop a GLHC plan to show how they would go about developing and substantiating a claim. This plan would be submitted to the jurisdictions for approval and once approved the food business would need to stick to it.

Step 2 – Food business would prepare a dossier of science to back the claim whilst also documenting any other Food Standards Code requirement for making claims.

Step 3 – Monitoring and compliance by jurisdictions.

Step 4 – Verification and enforcement including complaints procedure and penalties (to be advised).

They have already presented the above idea to major industry groups e.g. AFGC, AQIS, jurisdictions, public health and consumer organisations. There is no public consultation period planned for this proposal.

The next steps are to

- Further discuss with the Implementation Subcommittee and jurisdictions
- Ministerial Council review response to FSANZ Board by March 2011
- Present to Ministerial Council April 2011

How will this impact the Australian Nut Industry?

At present there are no nut claims already scheduled in P293 health claim standard and at present no other international government organisations with GLHCs for nuts (the US has a qualified health claim and FSANZ won't be accepting qualified claims although this will be a good place for us to spring from) which means we will have to develop our own scientific dossier which FSANZ or other will need to approve. Fortunately we began this process in 2006 by asking the University of Wollongong to review the research up to 2006 for substantiating a nut and heart disease high level health claim which could also be used to support GLHCs. Updating the document will require adding research from 2006 and beyond.

While Nuts for Life will be able to provide the science for the dossier, each company wishing to use GLHC claims on pack will need to complete a full dossier which includes the other requirements for making claims in the food standards code and have this available should they be asked by the jurisdiction to verify a claim. There will be a two year transition period to comply with the new standard once it is gazetted.

Public Health Policy – Core foods review and dietary guidelines review update

The draft consultation paper from the Australian Government National Health and Medical Research Council - A new food guidance system for Australia – Foundation and Total diets – was released for comment in May 2010 however delays have meant the final document will now not be released til March 2011 The Australian seafood industry were not happy with the draft recommendations to have less than two serves of fish a week for environmental and sustainability reasons. The NHMRC responded to say this dietary modelling research is not to be interpreted as the final recommendations for dietary guidelines and have since changed the name of the document to A Food Modelling System to Inform the Revision of the Australian Guide to Health Eating. This along with the

scientific literature reviews on various food health relationships will now be released at the same time as the release of the draft dietary guidelines for public comment in March 2011.

National Heart Foundation Tick program

More and more Nuts for Life contributors are taking advantage of the cheaper sublicense fee ANIC and N4L have negotiated with the Heart Foundation Tick program. If you are considering using the Tick on pack, website or resource please contact Lisa Yates first to receive a set of guidelines we have developed for the nut industry. Email admin@nutsforlife.com.au

Nuts for Life contributors staff education meetings

Around 200 N4L Contributor companies staff members attended a Nut Myth Busting workshop with Lisa Yates this year. A big thank you to those key staff members at each company who helped arrange venues, AV equipment and schedules. Lisa's presentation slides are now available on the Nuts for Life website (www.nutsforlife.com.au) under Contributors/ Resources/ Presentations.

We have managed to undertake this project quite cost effectively by combining workshops with other trips such as conferences so there is still a little in the budget for two more events. Should any company who has yet to run a workshop wish to or a company wish to repeat the exercise for staff who missed out please call Lisa Yates to organise Ph 02 9460 0111.

Lisa Yates

Program Manager and Dietitian

Nuts for Life

Ph 02 9460 0111

Email admin@nutsforlife.com.au





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Marketing Update

Influencing the Influencers

Over the past three years, an educational program has informed the nutritional benefits of eating almonds to key health professionals, including general practitioners (GPs), dietitians and fitness advisors.

It is important for the Australian almond industry to continue its educational work surrounding the nutritional role almonds play in a healthy daily diet, with a particular focus on the healthy fats in almonds. In 2010, educational resources distributed to health professionals included a document outlining the relationship between almond consumption and lowering LDL cholesterol to reduce the risk of heart disease and the successful heart-shaped almond tin, designed to hold the recommended 30 gram portion of almonds for a healthy daily diet, which has been embraced by the target audience and passed on to their clients/patients.

Taste & Flavour Rules!

The Australian food service industry plays a significant role in the consumption of food - they influence the foods people eat within their restaurants and cafes and are an important source of ideas that filter back into homes and kitchens. Food service professionals in Australia do not currently have a high level of knowledge about the nutritional and health benefits of adding almonds to their menus and food products. Whilst an educational program directed at health professionals has been undertaken, a systematic communication program directed toward food service has been lacking in the past.

A project has now been developed including a portfolio of educational resources that combine the key health benefits of eating almonds, detailing their taste characteristics and versatility. This educational portfolio combines both printed and electronic media, and introduces Stefano de Pieri, a renowned cook from the Mildura region and Australian Almond Ambassador, as the lead educator for the program. It features a resource booklet, and a series of video segments

that provide an overview of Australian almonds and their versatility in the kitchen. A competition was launched at the Fine Food Shows in Melbourne and Sydney with fliers distributed encouraging food service students, chefs and consumers to enter an online recipe competition, with over 400 recipes received.

Consumer Crusade

2010 saw the implementation of new key marketing activities throughout the year. The introduction of a 'Fuelling Fitness for Netball' competition running throughout July asking for entrants to 'Tell us in 100 words or less' what their netball club would do with one of five \$1000 grants from Australian Almonds. The competition had over 550 entries from all states of Australia, ranging from poems and rhymes, to pleas from clubs to help repair or replace their ageing equipment. Finalists were chosen based on creativity, and winning entries covered each state in Australia. The ABA is intending run the competition again in 2011 during netball season to re-enforce our message to the Australian netball community.

Our blossom season was also strengthened this year by the addition of click through advertising banners on www.womansday.com.au and the ABA websites during August, linking directly to the recipe section of australianalmonds.com.au

International Marketing in 2010 and beyond

Australia is the second largest exporter of almonds, exporting to more than 30 countries around the globe and our production and export capacity continues to expand. To enhance Australia's ability to further develop export opportunities into both existing and emerging markets, a suite of activities has been undertaken by the ABA, together with direct

involvement from Australia's major almond exporters.

These market development activities focus on two key export regions: India and China. In 2009/10, the ABA coordinated trips to both India and China - providing opportunities for participants to develop useful networks and undertake in-market research, necessary to understand any further export development initiatives that may be required.

The visit to China in May 2010 also coincided with SIAL China 2010, China's largest exhibition for the food, beverage and hospitality industries, which gave participants the opportunity to gain a broader understanding of the Chinese market and relevant opportunities. This tour concluded with attendance at the 29th World Nut & Dried Fruit Congress in Beijing, with a record breaking attendance of more than 850 delegates.

2011 will again place a major focus on international marketing, with planned involvement at –

- Gulfoods, Dubai in February;
- Hofex, Hong Kong in May; and
- Anuga, Germany in October.

An industry networking function will also be hosted by the ABA in India in February, to coincide with the release of the 2011 crop estimates figures. The ABA plans to continue its strong relationship with the Indian market, and a key focus of the planned activities for the upcoming year are to gain and capitalise on a more detailed understanding of consumer preferences, market demographics and the potential of health benefit education.

A marketing plan is being developed to create a sustainable and profitable long-term export market for the Australian Almond Industry.

For further information contact:

Joseph Ebbage
Marketing Program Manager
Almond Board of Australia
E: jebbage@australianalmonds.com.au





Australian Almond Conference 2010



October this year saw Australian almond growers and industry members converge on Mildura, Victoria for the 2010 Australian Almond Conference. Hosted by the ABA, this year's event surpassed expectations with over 230 delegates attending from ranging sectors of the almond industry.

The theme for the 2010 Australian Almond Conference was "New Horizons". International and domestic keynote speakers were invited to present the latest information on a wide range of issues, catering to a large audience of delegates and facilitating the development, learning and interaction between members of the Australian Almond industry.

This year's event kicked off with a well attended round of golf on the Wentworth Golf Course sponsored by Select Harvests. A beautiful sunny day providing ideal conditions for the 50 participants, and the competition was fierce! Congratulations Peter Cavallaro's team and Peter Rohrlach's team who tied for first place on 65 strokes. The wooden spoon was in hot contention also this year, with yet another tie. The longest drive on the 370m 18th hole was moved several times during the day, with Tim Millen ultimately taking out the prize. Nearest to pin competitions on the 2nd and 8th holes were won by Matt Tiley and David Keens respectively.

The 2010 Welcome Function Cruise was held on the Paddle Vessel Munday on Wednesday night, 27 October. Special thanks to sponsor JackRabbit for providing a great opportunity to network in a floodlight cruise along the Murray River.

Brendan Sidhu, ABA Chairman and Trevor Dennis, Managing Director of Gold Sponsor, HAIFA Australia jointly opened proceedings on Thursday morning, 28 October. The two-day conference program included presentations covering many aspects of almond growing and key industry issues such as: water and irrigation management; the almond breeding program; domestic and international marketing activities; pest and disease updates; and highlights from recent international study trips.

Renowned cook and Australian Almond Ambassador Stefano de Pieri headed up the program on Thursday, with an insight into the role of almonds in baking and food service. His presentation included two short videos that will form part of the ABA's new

Food Service Industry marketing campaign (see page 7).

The ABA's Annual General Meeting and HAL's Annual Levy Payers' Meeting formed an integral part of the Thursday program. During the AGM, ABA Chairman, Brendan Sidhu announced the appointment of Ross Skinner as the new ABA CEO, to replace Julie Haslett who had recently resigned. Brendan publicly thanked Julie for her contribution to the ABA and Australian almond industry. Almond Industry Advisory Committee Chair, Dr Greg Buchanan introduced the new Almond Industry Research & Development Strategic Plan, a plan encompassing actions intended to protect the industry against threats – both current and potential, and Mr John Lloyd, Horticulture Australia Limited CEO, made a presentation on the Changing Environment for Australian Research & Development.

Research and development presentations during the day included updates on current projects from Dr Michelle Wirthensohn with Performance of Almond Breeding Selections, Dr Prue McMichael provided information on Food Safety & Carmel Disorder whilst Mark Skewes and Dr Karl Sommer gave updates on Rootzone Solute Monitoring and Deficit Irrigation helping to round out the day's proceedings.

The Annual Conference Dinner, sponsored by Elders was a great end to the first day's proceedings. Dinner included a surprise presentation to departing CEO Julie Haslett, and a well deserved standing ovation from all in attendance. Former Australian Test Cricketer Darren Lehmann provided an entertaining look at the world of international cricket with anecdotes and stories from his time on tour with the team, including facing the fast bowling of Shaun Tait and playing against Sachin Tendulkar and Brian Lara, and time recently spent in India as coach of the Deccan Chargers IPL team.

Friday's program included keynote addresses by Sara Grafenauer from Nourish Nutrition, during which she offered a glimpse into the nutritional aspect of almonds titled; Almonds – The Healthy Nut! Shaya Nettle and Joseph Ebbage followed with a presentation of the current activity in the promotion of Australian almonds. Brian Tormey from Premier Almonds in the USA provided a candid look at the emergence of Australia as a global almond player.

The final session of this year's conference was a reminiscence of the past 15 years and a glimpse into what the future may hold for the Australian almond industry. Titled - Celebrating 15 Years: Industry Perspectives, industry stalwarts Tony Spiers, Neale Bennett and Tom Martin recalled days gone by and advances made during their years within the industry, with Denis Dinicola and Jake Langdon looking to the future and where the industry may take us.

Delegates benefited from ongoing networking opportunities with their peers, presenters and suppliers during the duration of the conference, also taking advantage of the new 'Exhibitor Passport' promotion with were some fantastic prizes up for grabs including a Tonne of Potassium Nitrate kindly donated by Gold Sponsor HAIFA, chemicals from Nufarm, houseboat holidays and a Darren Lehmann autographed cricket bat. These were drawn at the conclusion of Friday's proceedings before heading to the Lake Cullulleraine Field Day.

The Australian Almond Conference is an annual event which provides excellent opportunity for industry education and networking. Stay tuned for more information regarding the next Australian Almond Conference to be held 26-28 October 2011 in the Riverland, South Australia. Further venue and event details will be available early in the new year. The ABA would like to thank conference co-funder, Horticulture Australia, sponsors and presenters for making this event possible.

Presentation slides from the 2010 Conference are available to download from www.australionalmonds.com.au

Many thanks to everyone for their never ending enthusiasm and support and for making the conference a great success!

Sponsorship, exhibition and conference enquiries for 2011 should be directed to:

Jo Ireland, Communications Coordinator
 Almond Board of Australia
 P 08 8582 2055 F 08 8582 3503
 E: jiireland@australionalmonds.com.au

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In The Orchard...

by Brett Rosenzweig

This year's spring weather conditions have been both beneficial but also troublesome.

Most of the Almond growing regions have received an above average amount of rainfall for the three months of spring. The above average rainfall, combined with milder temperatures has provided lush growing conditions for both the trees in the orchard as well as weeds. The result is extra pressure on disease and weed management programs.

The following checklist should be considered over the next three months:

- **Review spring fertigation programs.** The mild spring temperatures and plentiful rainfall has provided good growing conditions for the trees. This means fertigation programs could be reduced if the trees have already established adequate growth for next year's crop, especially in light of this year's smaller projected Nonpareil crop. Be careful to maintain adequate nutrition post harvest in preparation for an expected larger Nonpareil crop next season.
- **Maintain cover sprays.** Moist, humid weather is providing the perfect environment for various fungal diseases. Brown Rot, Rust and Shot Hole can all be controlled with sprays of Iprodione, Mancozeb, Chlorothalonil and Propiconazole. Remember to check the labels for rates of use, limits on the number of times for use per season and with-holding periods leading up to harvest. Now is also a good time to check for excessive nozzle wear on orchard sprayers and replace if necessary.
- **Maintain orchard floor management.** This year's spring weather conditions are ideal for weed growth. Keep on top of weed growth now rather than in the weeks leading up to harvest. Mow or mulch any woody weeds to aid the breakdown of plant residue to ensure clean sweeping and pickup operations at harvest.
- **Check for impending heatwaves.** While we have had mild temperatures so far, the usual summer heatwaves will inevitably arrive. Keep an eye on internet weather forecasts for possible heatwave conditions. Double check

sub-soil moisture levels to make sure there are adequate moisture reserves. If your irrigation system has limited supply capacity, then plan ahead and start increasing soil moisture levels 1-2 days before predicted heatwave conditions. Remember to check known drainage areas for the effects of excess irrigation. Below are links to weather sites that I commonly use for a combination of temperature, wind and rainfall (some may need subscription):

<http://reg.bom.gov.au/products/reg/access/>
http://www.australianweathernews.com/forecast_OCF.htm
<http://www.bom.gov.au/watl/>
<http://wxmaps.org/pix/aus.vv.html>
<http://wxmaps.org/pix/prec7.html>
<http://www.eldersweather.com.au/>

- **Maintain harvest machinery.** Start doing routine maintenance on harvest machinery now so it is not left till the last minute. Organise spare parts as needed from your suppliers, remembering that most businesses close for an extended period of time over the Christmas – New Year break.
- **Next Year's Activities.** Start thinking about management options for next season to control potential biennial bearing problems. This year's Nonpareil crop is lighter than expected and combined with good growing conditions this spring, a bumper crop may eventuate next year. If light penetration is a problem, pruning when due for an 'on-crop' is best as the impacts of crop loss on budgets will be reduced. Decide whether a mechanical 'centre hedging' or a 'skirting cut' is needed; or hand pruning removing selected limbs is best. Weigh up the desired pruning effect required against what the budget can allow.

For further information contact:

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Industry Development Officer
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E: brosenzweig@australionalmonds.com.au



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Grower Profile

Tim Orr

Director - Lake Cullulleraine Almonds, Victoria

Favourite Quote:

"Whisky is for drinking, water is for fighting over" Mark Twain

Education/Training:

Grade school & high school; Durham California

University of California, at "Cal Poly" San Louis Obispo. Bachelor of Science, Agriculture Business.

Orchard/s:

Lake Cullulleraine, VIC

1,100 acres, first trees planted in 2007

Varieties Grown:

Nonpareil, Carmel Monterey and Price

Employment history in the almond industry:

This is the first since my school days in California.

How do you see the almond industry changing over the next 10 to 20 years?

Food safety will become one of the biggest issues to the industry, testing procedures will continue to get better, and cheaper, with the ability to detect smaller amounts of contaminants. Product recalls for contamination are so expensive, both in dollars and brand reputation, that the industry must make it a priority. Product safety needs to start in the orchard, it can't be thought of as only belonging to the processors.

What do you see as the almond industry's biggest asset?

The growers and their willingness to try new ideas and practices.

If you weren't involved with the almond industry, what do you think you'd like to do?

With my background and my wife's food science background we may follow Tim Millen's lead with overseas volunteer training.

If you were to invite three people to dinner (fictional, dead or alive) to brainstorm the future of the Australian almond industry, who would you invite and why?

Water ministers Tim Holding, Paul Caica and Philip Costa. Ask them to explain why today's water trading laws look so much like the railroads of the 1800s with different track width for each state.

Why is it important to you to be a member of the ABA?

The ABA is conducting research that is relevant to local conditions, this information is readily available to everyone through email, field days and guest speakers, or by just calling the ABA.

Just for Fun

I should have.....

Listened to my wife about a few things..

I wish that I could.....

Just take off and go fishing when I want to.

The first thing I do when I get to work is.....

Look at the weather forecasts and the exchange rates.

Almond Skill Set

A course covering aspects of almond production through to processing/marketing

There are still spaces available for this training course which covers some nationally accredited units in production, processing and marketing, with a focus on almonds.

GrowSmart Training and River Murray Training, with strong support from the Almond Board of Australia, are looking for interested people either currently working in the almond industry or those keen to find an opportunity to become involved in the industry, to participate in training that includes:

Underpinning knowledge and practical training across all aspects of the industry, from growing almonds to processing and marketing.

Ten nationally accredited subjects provided as a "skill set", and conducted over the term of 12 months. These units can be added to at a later date to enable the participants to gain a formal qualification.

17 days of training over the 12 months will mean a minimal period of time required to be away from your work and much of the training

will involve trips, local and interstate, and on-property training sessions, including exposure to industry experts. This will include the very latest in almond production technology, both here and from overseas.

The units chosen by the Almond Industry to make up the skill set for this project are:

- Horticulture
- Control plant pests, diseases and disorders
- Harvest horticultural crops mechanically
- Implement a plant establishment program
- Implement a plant nutrition program
- Determine seasonal irrigation scheduling tasks
- Participate in workplace communications
- Food processing
- Implement quality systems and procedures
- Implement the food safety program and procedures
- Monitor the implementation of quality and food safety programs
- Implement occupational health and safety systems and procedures

There will be a one day marketing information workshop to assist the participants to understand what marketing actually is. It is important for them to understand the whole process from production to processing to marketing to consumer. Experience suggests that when employees see the whole picture, not just the part that they are involved in, the commitment to their part in the process is much greater. This, of course, is the model of whole of food value chain that Thinker in Residence Andrew Fearn promoted.

The course will be at a cost of \$250 per person and based in the Riverland.

This is an opportunity to be grasped. Further information and an application form can be obtained from:

Ian White at GrowSmart
Training on 0419
832 871 or the
GrowSmart Training
office on 8582 2270.



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Don't be a drifter

Spray Workshops

Two spray application workshops, titled "Don't be a Drifter", were held in Renmark and Mildura on the 23rd and 25th November respectively. The course presenters were Craig Day and James Wright. Craig is a broad acre spray contractor and chemical use trainer in all aspects of herbicide application. James runs Wright Viticulture, which is a consultancy business, and also develops specialist training and technical advice for the viticulture industry, which includes assessment of canopy coverage.

A number of topics were covered during the course, which included:

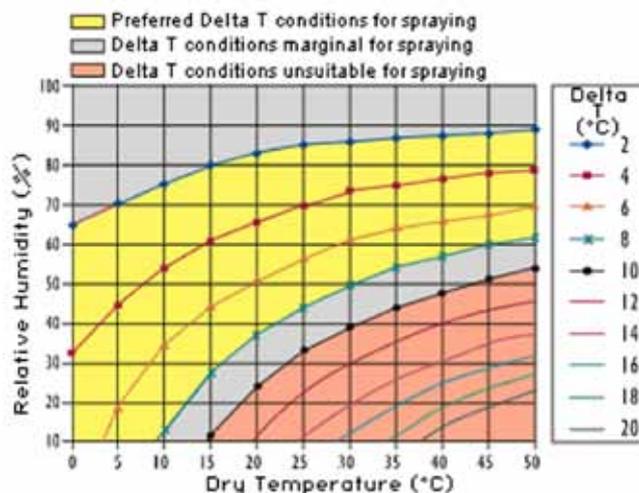
- Discussion on chemistries of almond chemicals, i.e. mode of action and relating it back to the application decisions that should be taken
- Set-up, use & calibration of boom sprays (under-tree spraying) including spray speed & height
- Set-up, use & calibration of air-blast sprayers (tree spraying)
- A demonstration using fluorescent tracers and UV light to observe chemical coverage on the weeds and trees using different nozzles, pressures, water rates, speeds, etc
- Label changes in relation to droplet size, drift and buffer zones
- Drift – vapour and particle
- Water quality, importance of adjuvants and understanding target complexities
- Time of application, weather conditions including consideration of Delta T – speed, direction, temperature, inversion
- Buffers and chemical sensitive areas – new APVMA requirements
- Spray quality/droplet size requirements for different products and targets
- Selecting the correct spray nozzle and pressure, setting up rate controllers
- Water rates and mixing order
- Understanding spray application information on chemical labels
- Chemical handling systems and personal clothing protection
- Storage and handling

Both days were well attended with keen interest about the above topics. The information presented aimed to encourage attendees to review their application methods and modify them when greater efficiencies could be achieved. A number of key points were raised during the workshops and are summarised below:

- Review chemical labels which now recommend specific water rates and nozzle selection; particularly for herbicide use e.g. Glyphosate labels recommend

a nozzle producing coarse droplets and water rates of 80 to less than 200L/Ha.

- Discussion of mode of action of chemicals that are surface acting, translaminar or systemic and the importance of water rates and coverage for each mode of action e.g. Glyphosate has a systemic mode of action and therefore works best if there is a higher concentration of chemical per water droplet and may only need water rates less than 150L/Ha.
- Highlight the main causes of drift in relation to inversion layers and small droplet size. Droplet sizes less than 150 micron are prone to drift and off target damage. Air induction nozzles help provide a coarse droplet which will help reduce drift.



- The use of Delta T to predict the longevity of spray droplets in an off target situation. It is indicative of evaporation rate and droplet lifetime. Delta T is calculated by subtracting the wet bulb temperature from the dry bulb temperature. Droplets in a situation where the Delta T is less than 2 may persist for longer than is intended and therefore be at risk of causing off target drift and damage. Conditions with a Delta T of 8 or greater may mean the droplet dries too quickly and absorption rate into the target plant may be reduced or not even reach the target at all.
- The importance of understanding and measuring water quality i.e. water hardness, high pH and high water turbidity. Glyphosate's effectiveness and longevity in the tank will be reduced by high water hardness and / or pH. Adjuvants may need to be added to improve water quality.
- The correct mixing order of water conditioners and herbicides. Tank mixes should be in the order of Water Conditioners, Wettable Powders,

Dry Flowable Granules, Suspension Concentrates, Emulsifiable Concentrates, Water Soluble Concentrates and finally Adjuvants / Wetters. If not mixed in this order, settling of chemicals can occur in the tank or the activity of the chemical will be reduced.

- How to review individual nozzle and boom section pressure was examined. It is best to set pressures at the nozzle using a pressure gauge rather than relying on the pressure gauge at the pump. While doing this, double check for pressure variations between the booms as individual booms are shut on or off and adjust accordingly.
- A review of chemical sheds and personal protective equipment was also carried out. Remember to keep MSDS sheets up to date and no older than 5 years. The more you keep PPE hygienic (clean) and readily accessible, the more likely it is to be used by spray operators.
- The test of spray coverage with dyes and UV lights showed that air induction nozzles can help reduce drift while not having a detrimental effect on coverage. Pressure could also be adjusted to help enhance coverage.

VERY IMPORTANT: Good canopy coverage is dependent on a number of factors including: wind velocity and volume of displacement, nozzle selection, pressure and corresponding droplet size, rates of water applied and ground speed. Before attempting

any major changes to canopy sprayers, check for adequate coverage (preferably doing a dye test with UV lights) before and after changes. Don't put yourself in a position of poor canopy coverage in a year of high disease pressure!

The feedback received about the courses has been very positive with most attendees planning to use some of the information learnt to make changes on their own property. Future Don't be a Drifter spray workshops will be planned for regions not covered by the initial two courses. For more information on the recent spray workshops or registering interest for future spray workshops, contact the ABA office.

For further information contact:

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P 08 8582 2055 or 0429 837 137
E: brosenzweig@australionalmonds.com.au

*Wishing
everyone a*

*Very Nutty
Christmas*

*from the ABA Board
members and staff*



ALL ABOUT AUSTRALIAN ALMONDS



ALL ABOUT AUSTRALIAN ALMONDS

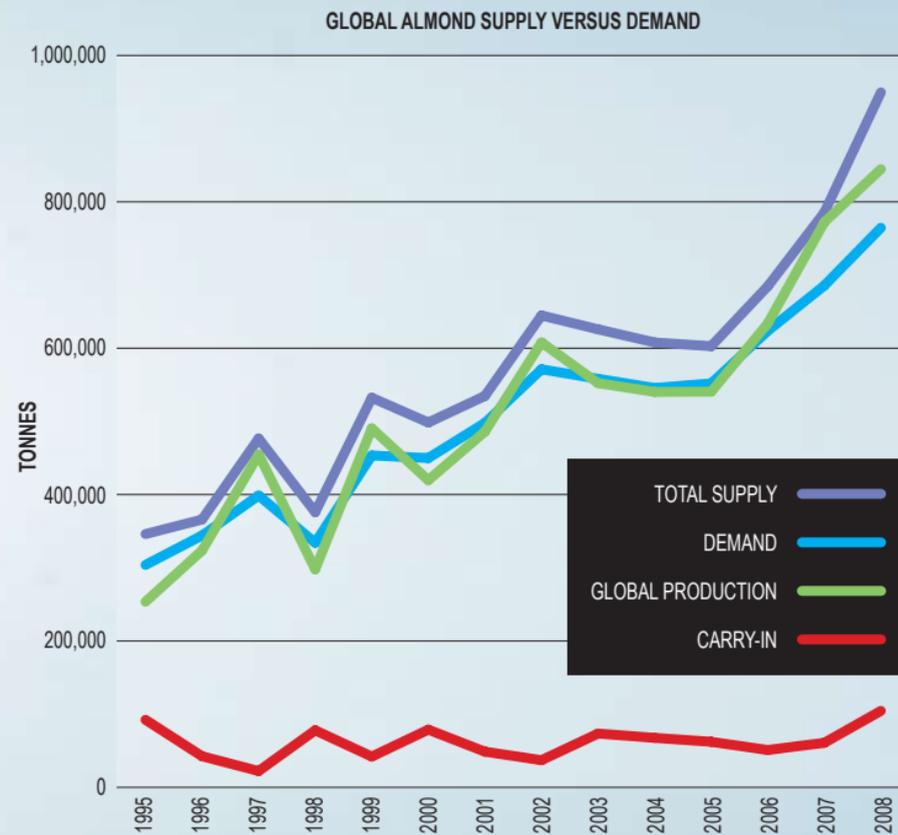
1. World almond consumption is at an all time high
2. Developing countries are driving almond consumption growth
3. Global almond supply, restricted by access to suitable growing conditions, will not meet future demand
4. Australia has successfully marketed increased tonnages into rapidly expanding markets
5. Australia will become the world's second largest almond producer as existing plantings mature
6. Australian almonds are enjoyed by more than 40 countries around the world
7. Australia is world competitive in both quality and cost
8. Almonds are one of Australia's most high value, efficient, environmentally friendly water converters
9. Almonds are a valuable contributor to the Australian economy
10. Almonds are a healthy, versatile, natural food that has been consumed since ancient times

1 World almond consumption is at an all time high and has more than doubled over the past decade at price levels attractive to both consumers and growers

Consumer demand for almonds has increased globally. This trend is expected to continue due to increased awareness of the positive health message and rapidly growing demand from developing markets.

Worldwide almond consumption has more than doubled over the past decade, with consumption growth averaging 9% per annum during this period.

The international almond industry has a proven track record of building supply commensurate with demand at pricing levels attractive to both growers and consumers.



2 Developing countries such as India, China and the Middle East are driving almond consumption growth

Almonds are in high demand in many developing countries and Australia is well positioned to service these markets.

MIDDLE EAST

The Middle East has an ancient tradition of almond consumption, with almonds playing a key role in breaking of the Ramadan fast.

Over the past 12 months, this region has been Australia's fastest growing almond export market, experiencing a seven-fold sales increase.

INDIA

India is Australia's largest almond export destination, with Australia currently holding approximately 12% market share of the Indian almond imports. India's domestic production of almonds is limited.

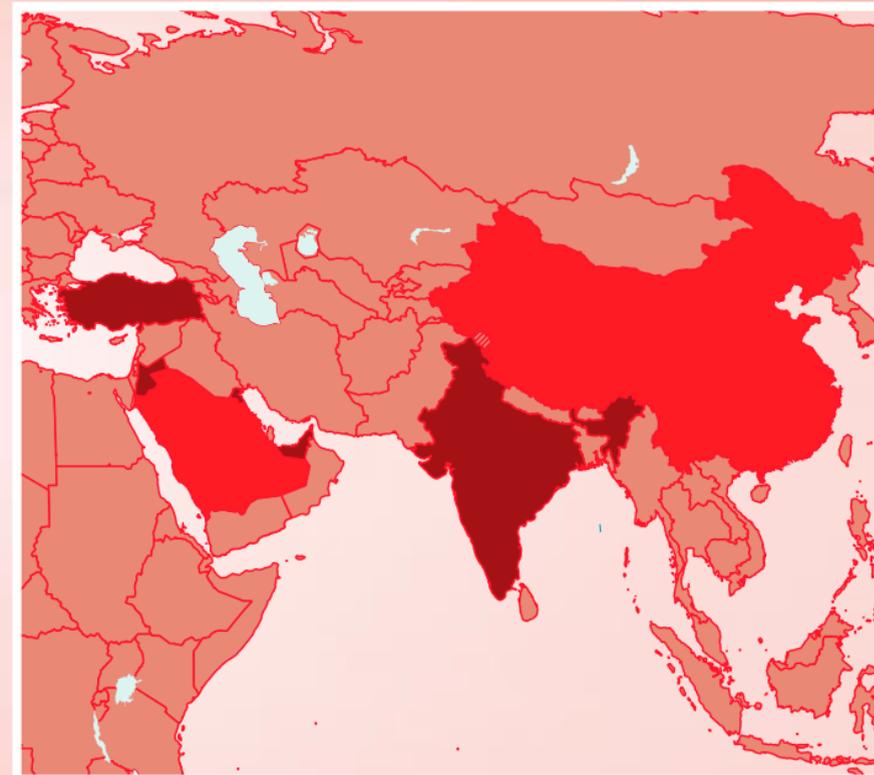
Almonds have long been an integral part of India's cultural heritage, especially during festive periods and weddings. Traditionally, Indian parents feed their children almonds, believing that almond consumption improves mental perception.

CHINA

China is an extremely promising export market in terms of long-term growth potential.

Almonds are primarily consumed as a roasted, salted snack, either shelled or in-shell, particularly in the winter season surrounding Chinese Lunar New Year.

Retail stores in major cities are increasing their range of almond snack products, with increasing usage in bakery.



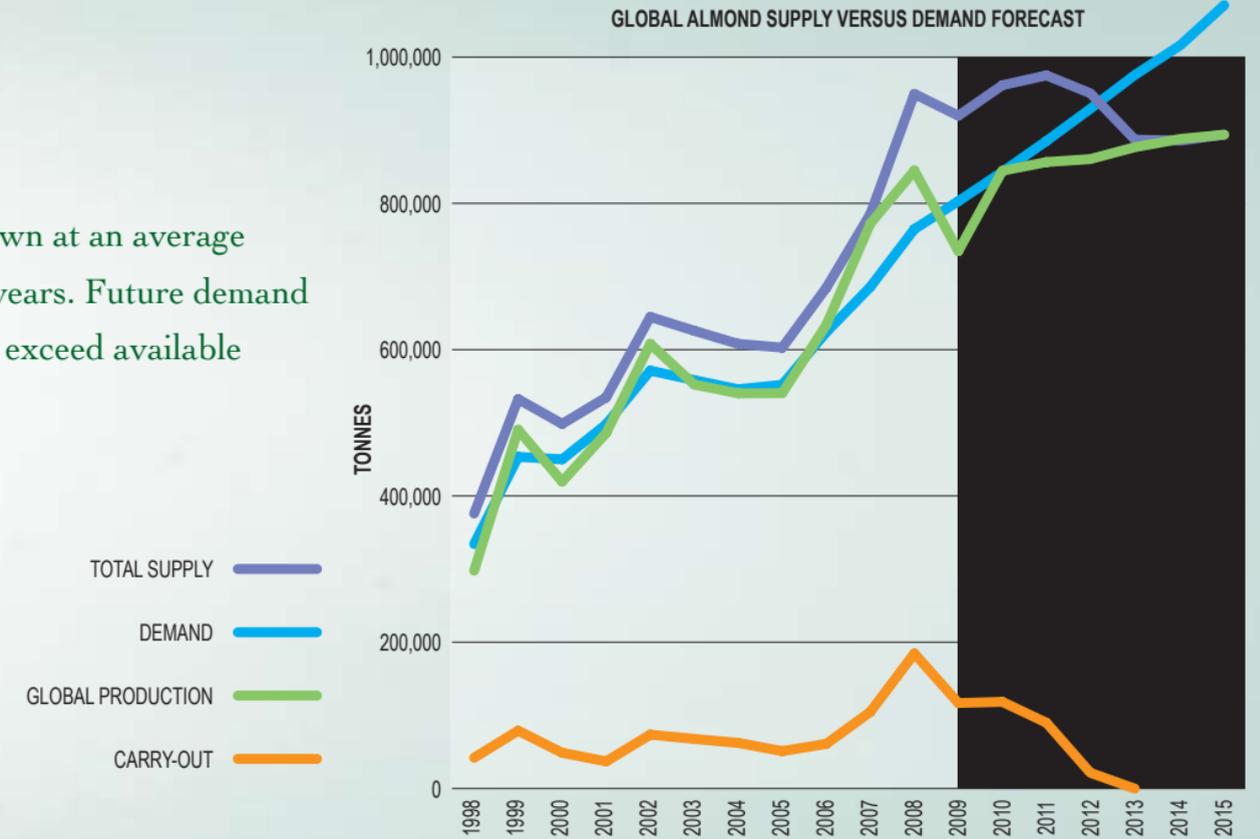
3 Global almond supply, restricted by limited access to suitable growing conditions, will not meet future demand driven by population growth

Almonds are commercially produced in very few locations around the world, requiring a Mediterranean climate: cold winters during dormancy and warmer summers to develop the nut. Producing areas are further restricted by the need for suitable land and water availability.

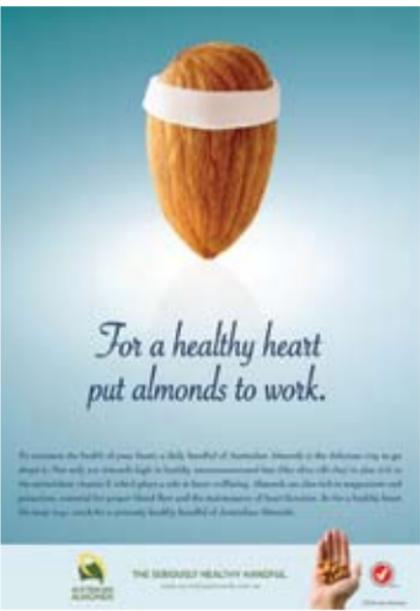
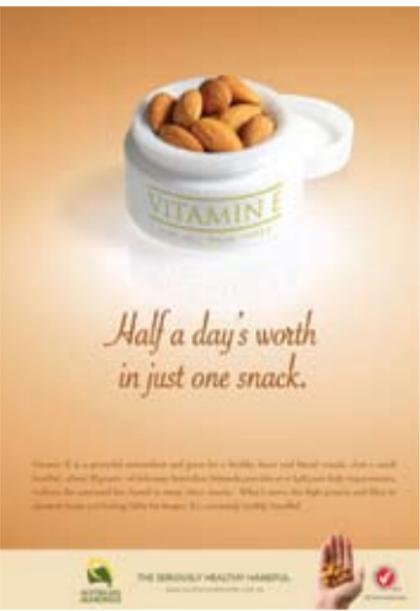
Australia's Murray Darling Basin, provides the perfect combination of growing conditions, with four major producing regions:
Sunraysia (Victoria)
Riverland (South Australia)
Riverina (New South Wales)
Adelaide (South Australia)



World consumption of almonds has grown at an average rate of 9% per annum over the past 10 years. Future demand growth of 5% per annum is expected to exceed available supply by 2012.



4 Australia has a long-standing track record of successfully marketing increased tonnages into rapidly expanding domestic and international markets

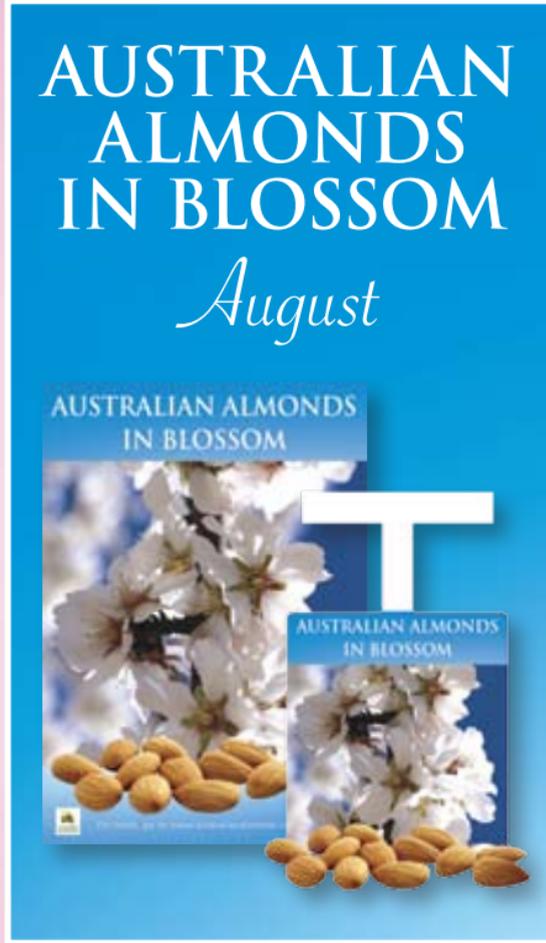


Australia has successfully marketed increasing almond tonnages into both existing and newly established markets.

Key to this success is an understanding of the importance of building strong customer relationships, both in Australia and around the world. These relationships have been further strengthened by targeted marketing initiatives.

Increased international demand has led to a 60% growth in the value of Australian almond exports this year.

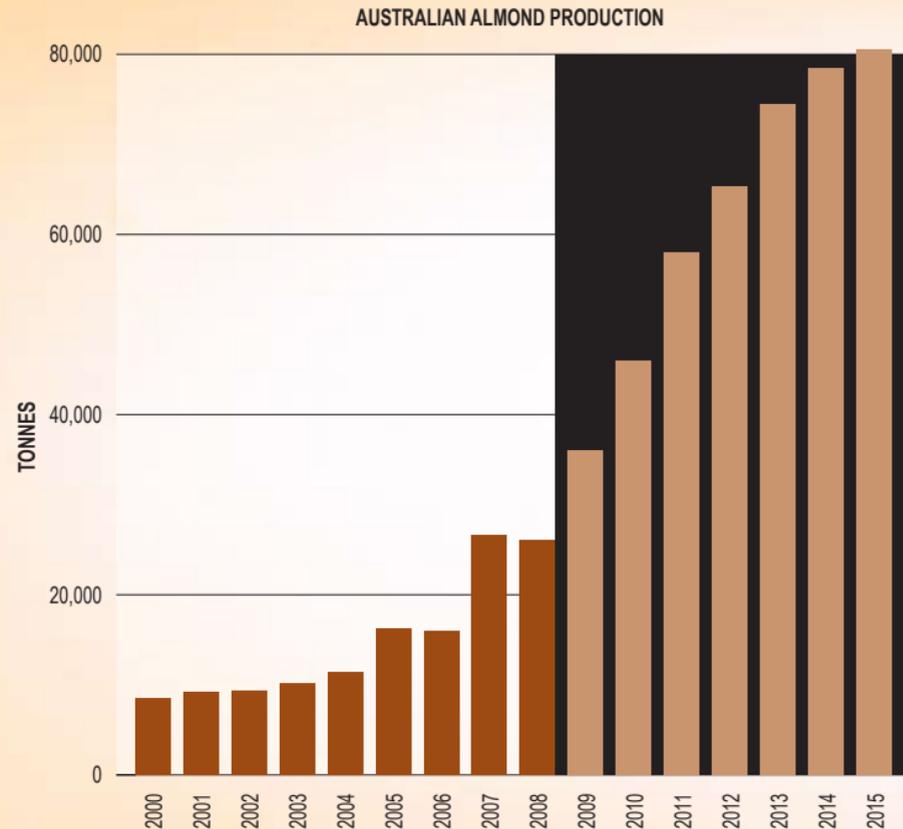
And Australian's are eating more almonds, with domestic consumption increasing by 10%. Today more than 90% of almonds sold in Australia are grown and produced by Australian farmers.



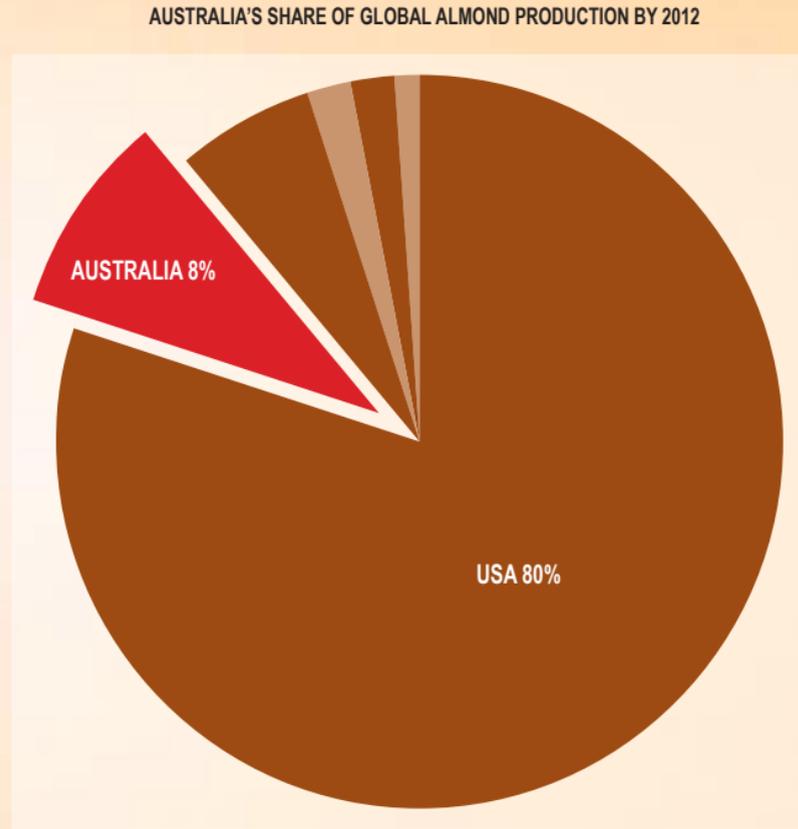
5 Australia will become the world's second largest almond producer as existing plantings mature

Australian almond plantings have increased more than seven-fold over the past eight years to a current total of 27,300 hectares.

Future production increases will occur as these young plantings reach maturity, bringing productive capacity up from 36,000 tonnes to 80,000 tonnes by 2015.



Industry turnover will double, equating to more than \$500 million a year, servicing increasing demand both locally and overseas. This growth will see Australia's contribution to global almond production increase from 3% in 2008 to an expected 8% in 2012, to become the world's second largest almond producing nation.

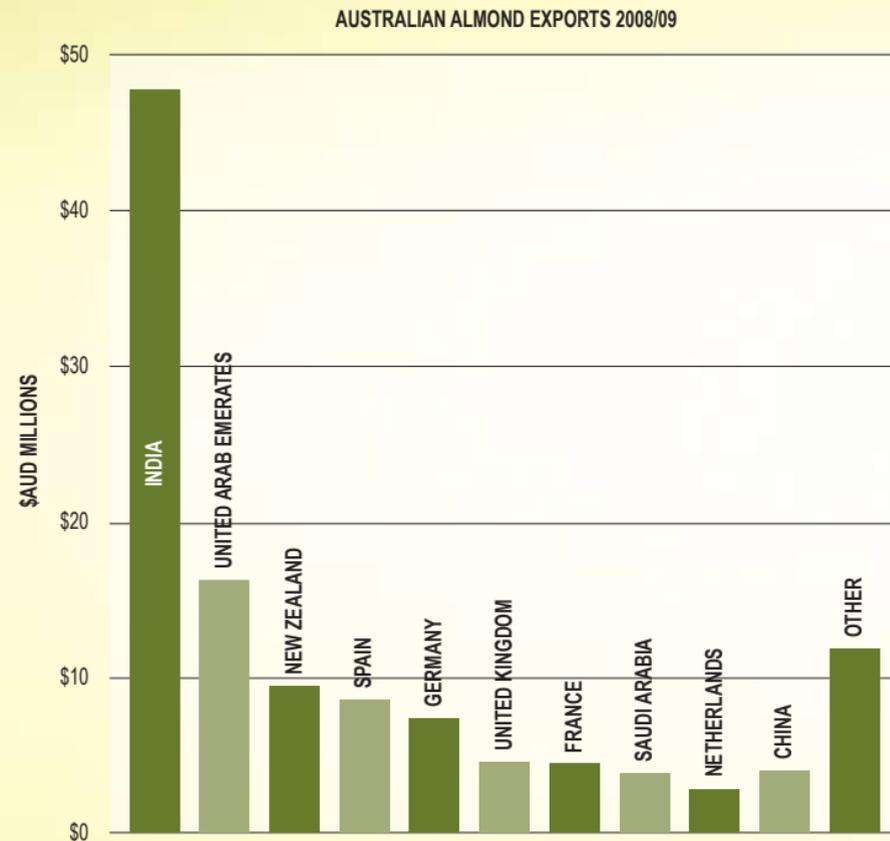


6 Australian almonds are enjoyed by more than 40 countries around the world

Almonds are now Australia's third largest horticultural export, totalling \$120 million in 2008-2009. Almonds are a significant contributor to the recent growth in Australian horticultural exports.

60% of the Australian almond crop is exported to more than 40 countries around the world. Continued export growth is anticipated with heightened international recognition of Australian almonds, combined with Australia's increasing ability to service this demand.

By 2015, it is expected that Australian almond exports will represent greater than 70% of total sales, with an associated value of \$350 million.



7 Australia is world competitive in both quality and cost

Australia is known for its natural advantages in agriculture, including favourable climatic conditions and low incidence of pest and disease, delivering; cost advantages, high yields, product quality and integrity.

The importance of quality is recognised throughout the entire supply chain, from nursery to grower through to processor/ marketer, with professional on-farm management practices, biosecurity and quarantine, and implementation of industry quality standards and testing programs.

Australia's product quality and counter-seasonality allows access to higher priced market segments.

Australia's almond growing season commences with the magnificent almond blossom in August. Harvest takes place in February and March, with produce ready for the market in April and May.



8 Almonds are one of Australia's most high value, efficient and environmentally friendly water converters

Almonds are a naturally efficient converter of water to food.

Historically almonds have a demonstrated track record of producing a high value return per megalitre of water applied. Sophisticated irrigation systems ensure that water application matches tree requirements and minimises environmental impact. Irrigation technology used throughout the industry is of the highest standard and latest design, with in excess of 90% of plantings under drip irrigation.

The major expansion of almond orchards has occurred in the past decade, with an appreciation that water is a limiting factor.



9 Almonds are a valuable contributor to the Australian economy

The Australian almond industry contributes significantly to the economic wellbeing of regional towns throughout Victoria, South Australia and New South Wales. The industry directly employs over 1,200 people in regional Australia, with additional indirect employment of a further 5,000 people.

The Australian almond industry is one of the most efficient in the world, competing in international markets and operating without any production or export subsidies. Australia does not impose any tariffs on imported almonds.

The long-term outlook for the continuation of an economically viable, internationally competitive almond industry in Australia is extremely positive.



10 Almonds are a healthy, versatile, natural food that has been consumed around the world since ancient times

Demand for almonds has been strong for thousands of years. They were a valuable commodity on the “Silk Road” between Asia and the Mediterranean, into Greece, Turkey and the Middle East.

Across the centuries, people have enjoyed the taste of almonds. One of the most popular ways of eating almonds is in its natural form.

Almonds offer a unique matrix of nutrients and have been clearly linked with improved heart health.

Not only are almonds healthy and great tasting, but they are also one of the most versatile foods in the world. Almonds are a key ingredient in a vast array of products including:

snack foods, confectionery, baking goods, breakfast cereals, and desserts.



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THE AUSTRALIAN ALMOND INDUSTRY



CONTENTS



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ALMOND GROWING REGIONS

Australian almonds are predominantly grown along the Murray River corridor in South Australia, Victoria and New South Wales.

Major Australian almond growing regions include:

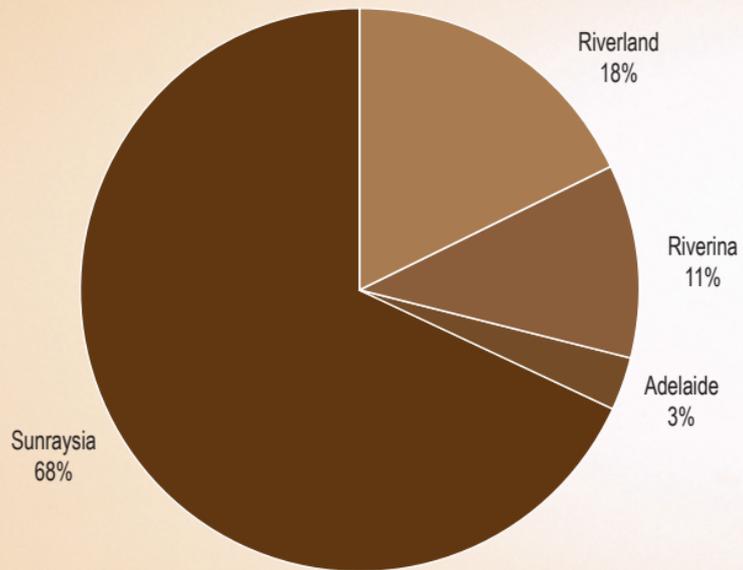
- Sunraysia
- Riverina
- Riverland
- Adelaide



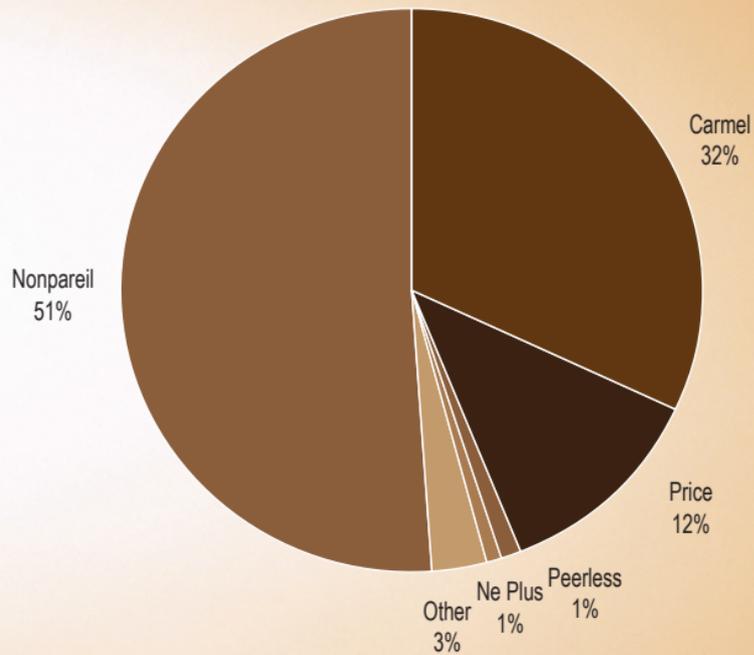
ALMOND PLANTINGS

- Australian almond plantings have increased over the past decade from 3,750 hectares (9,000 acres) in 1999 to 28,000 hectares (69,000 acres) in 2009.
- Less than 30% of Australian almond plantings have reached full maturity.
- One third of total almond plantings are non-bearing (less than 3 years).
- Nonpareil is currently the major variety, with greater than 50% of plantings.
- Carmel is the most popular pollinator variety, with 31% of plantings, followed by Price (12%).
- Other pollinator varieties include Ne Plus, Peerless, Mission and Monterey.

AUSTRALIAN ALMOND PRODUCTION BY REGION - 2009



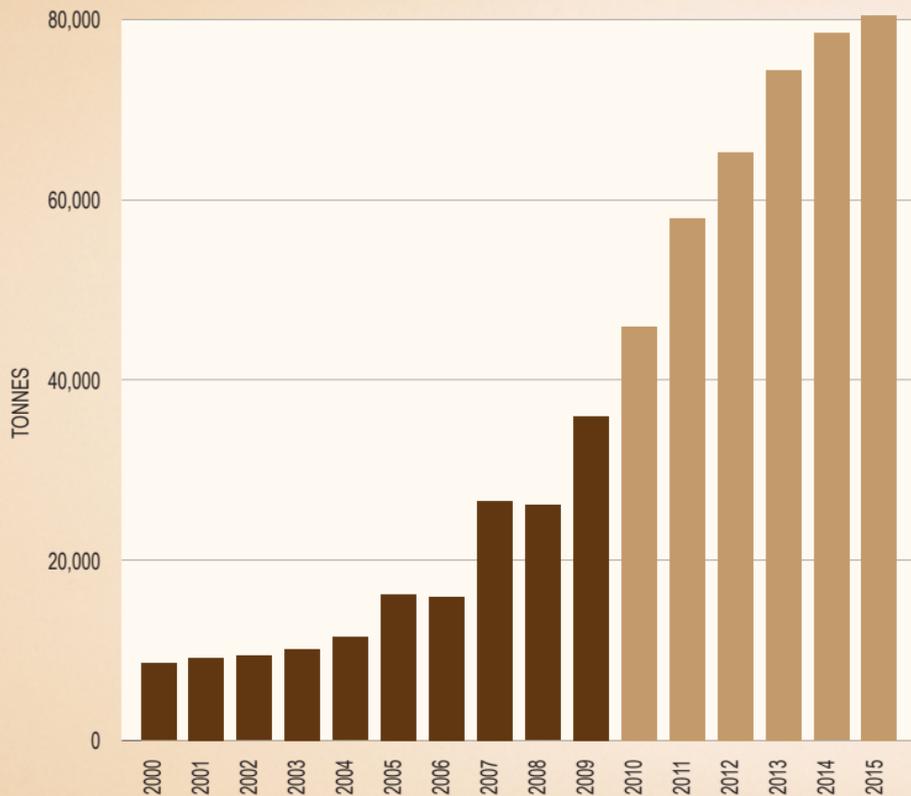
AUSTRALIAN ALMOND PRODUCTION BY VARIETY - 2009



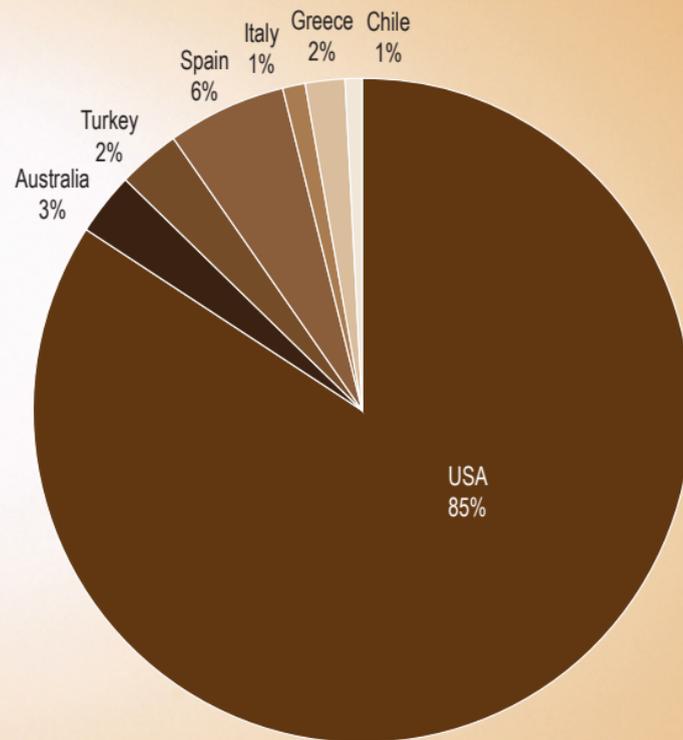
ALMOND PRODUCTION

- Australian Almond production in 2009 totalled more than 36,500 tones kernel (80.5 million pounds), being a 40% increase over the previous year.
- Future production increases will occur as young plantings reach full maturity.
- Based on existing plantings, productive capacity is expected to reach 80,000 tonnes of kernel (175 million pounds) by 2015, more than double current production.
- Australia is the third largest producer of almonds in the world, currently producing around 3% of world almonds, behind major producers USA (85%) and Spain (6%).
- Based on existing plantings reaching full maturation, Australia will soon overtake Spain to become the second largest almond producing country.

AUSTRALIAN ALMOND PRODUCTION (ACTUAL & ESTIMATED)



AUSTRALIA'S SHARE OF WORLD ALMOND PRODUCTION 2008



ALMOND FORMS

Australian almond grades

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

Almond sizes

Australian almond sizes are consistent with international standards. ie: Number of almonds per ounce.

18-20



20-22



22-25



25-27



27-30



30-32



Australian almonds are available in a range of blanched forms as well as in kernel and in-shell.



Natural Sliced



Kernel



In Shell



Whole Blanched



Slivered



Meal



Blanched Sliced

ALMOND LIFECYCLE

Dormancy

Almond trees are dormant over the colder winter period, around May to July in Australia.



Blossom

Blossom usually occurs in late July to early August. At the start of blossom in almond orchards, you will often see alternate rows in bloom. This is because almonds are not self-pollinating, so there are always 2-3 varieties interplanted in an orchard. Bees are used to cross-pollinate the blossoms.



Maturing Nuts

During September and October, blossom petals fall and leaves begin to form on the trees. The fuzzy greyish-green fruit starts to form, and grows rapidly in size over spring. The hulls which cover the growing nuts continue to mature and harden.



Harvest

Harvest occurs between February and April, when the kernel is at an acceptable moisture level. Mechanical harvesting requires that orchard floors be clear of large weeds and swept of all foreign material. Shakers are used to vibrate the tree trunk, so that the husks, shells and nuts inside fall to the orchard floor. After drying, they are swept into rows and picked up ready for storage.



Hull Split

The hardened hulls usually start to split over summer, around January and February. Over the next month the splits widen and open further. The almond shell is now visible through the split in the husk, and the nut itself begins to dry out. Eventually, the nut separates from its stem and the hull opens completely.



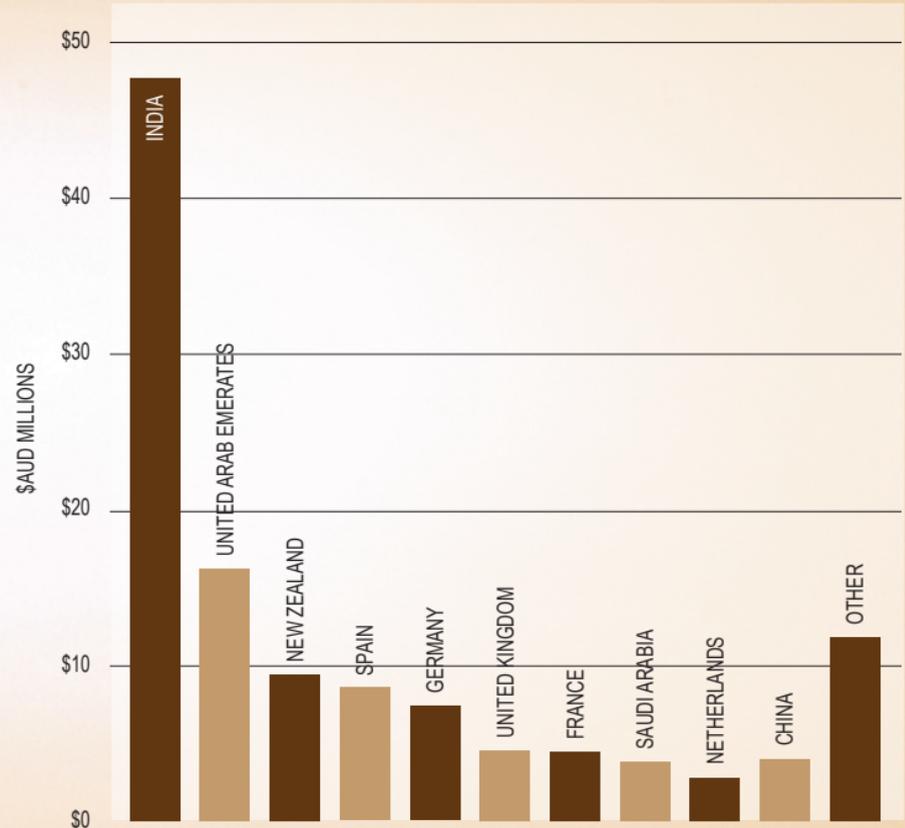
Processing

The first step in processing almonds is to remove the hull and shell of the almond. This is known as either hulling and shelling, or cracking. Almonds can be slivered, sliced, diced, split, left whole or ground (meal/flour) depending on application.

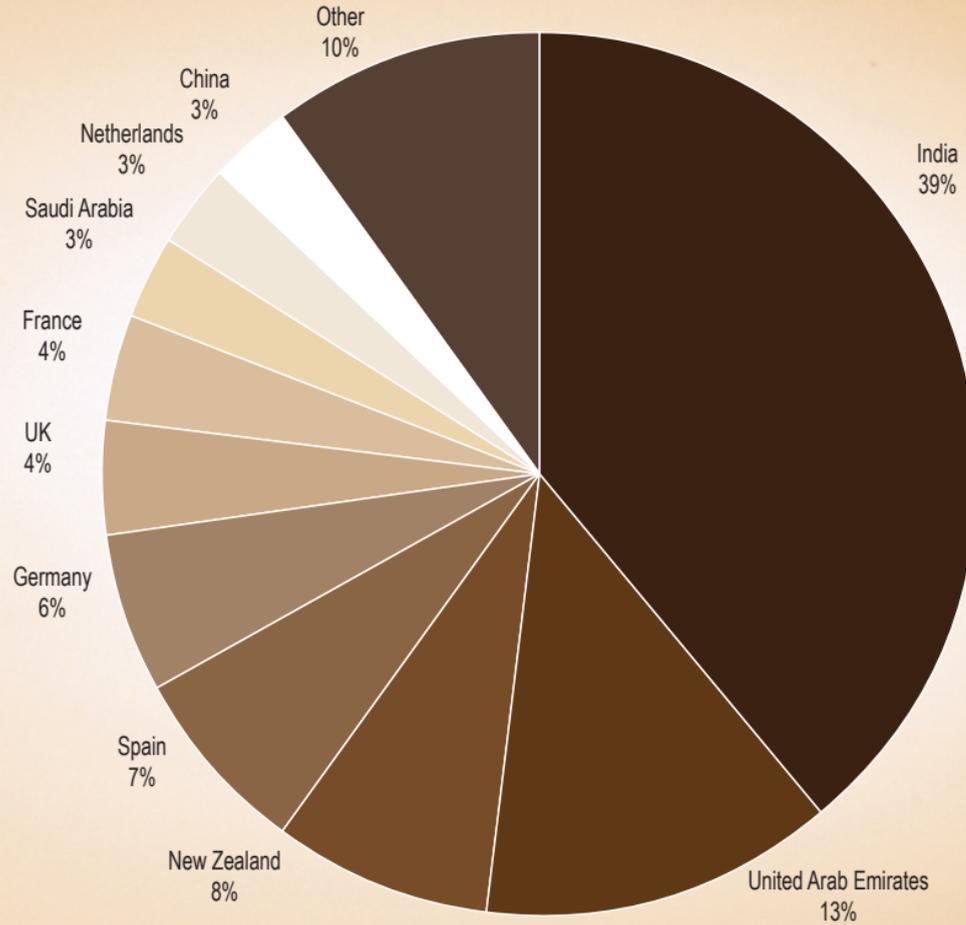
ALMOND SALES

AUSTRALIAN ALMOND EXPORTS - 2008/09

- Australian almonds are exported to more than 40 countries with exports currently representing 60% of Australian almond sales.
- In 2008/09 Australia exported \$121 million of almonds: 13,720 (30.2 million pounds) of kernel and 13,720 tonnes (30.2 million pounds) of in-shell almonds.
- Domestic sales accounted for nearly 40% of Australian almond sales in 2008/09, with more than 90% of almonds consumed in Australia being locally produced.



AUSTRALIAN ALMOND EXPORTS - 2008/09



ALMOND HEALTH & NUTRITION

Nutritional Benefits

- Almonds are extremely high in Vitamin E.
- Almonds are low in sugar and are a low GI food. Eating low GI foods provides sustained energy.
- Almonds are Gluten free.

Almonds and a healthy heart

- Almonds contain “good” monounsaturated fat - also found in olive oil and avocados. Studies show that diets which replace saturated fat with monounsaturated fat, are beneficial for heart health. Almonds also contain phytosterols, which are plant compounds that help support heart health.



CERT TM

A handful of almonds everyday* supports your heart health

*When replacing foods higher in saturated fat.

- A 30g serve of natural or unsalted almonds are Heart Foundation Tick approved.

NUTRIENT COMPOSITION OF ALMONDS

<i>Nutrients</i>	<i>Units</i>	<i>Value/100g</i>	<i>Value/50g Serve</i>
Energy	kJ	2503	751
Protein	g	19.5	5.9
Total lipid (fat)	g	54.7	16.4
Saturated fat	g	3.7	1.1
Monounsaturated fat	g	35.9	10.8
Polyunsaturated fat	g	12.8	3.8
Plant sterols (phytosterols)	mg	141	42
Carbohydrate	g	4.8	1.4
Sugars (total)	g	4.8	1.4
Dietary fibre	g	8.8	2.6
Water	g	3.7	1.1
Arginine	g	2.45	0.74
<i>Minerals</i>	<i>Units</i>	<i>Value/100g</i>	<i>Value/50g Serve</i>
Calcium - Ca	mg	250	75
Iron - Fe	mg	3.9	1.2
Magnesium - Mg	mg	260	78

Phosphorus - P	mg	480	144
Potassium - K	mg	740	222
Sodium - Na	mg	5.0	1.5
Zinc - Zn	mg	3.7	1.1
Copper - Cu	mg	1.0	0.3
Manganese - Mn	mg	2.29	0.69
Selenium - Se	mcg	2.5	0.75
<i>Vitamins</i>	<i>Units</i>	<i>Value/100g</i>	<i>Value/50g Serve</i>
Thiamin	mg	0.19	0.06
Riboflavin	mg	1.4	0.4
Niacin	mg	3.9	1.2
Vitamin B-6	mg	0.14	0.04
Folate, total	mcg	29	8.7
Vitamin A, RAE	mcg_RAE	2.0	0.6
Vitamin A, IU	mcg	9.0	2.7
Vitamin E	mg	26.2	7.9
Pantothenic acid	mg	0.47	0.14



°Figures from Nuts for Life
Ready Rekoner 2009
visit www.nutsforlife.com.au
and NUTTAB 2006
www.foodstandards.gov.au

BUYING AUSTRALIAN ALMONDS

For more information go to
www.australianalmonds.com.au/trade



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Australian Almond Statistics Report



2009 Report



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Information in this report has been sourced from the ABA's internal data collection activities, the Almond Board of California (ABC), the United States Department of Agriculture (USDA), Horticulture Australia Limited (HAL) and the Australian Bureau of Statistics (ABS).

In 2005 the Almond Board of Australia (ABA) embarked on an Industry Statistics Collection Program to facilitate the production of accurate and timely information with respect to the Australian Almond Industry.

A major component of this program is an annual survey of Australian almond growers, intended to collect and update planting data.

This report provides an overview of planting survey results. **It should be noted that this planting data does not account for plantings in previous years that have since been removed.**

Procedure

The source of planting data summarised in this report is an Australian Almond Planting Survey, distributed to all known Australian almond growers. More than 160 surveys were distributed in September 2009.

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

Greater than 95% survey response was received in 2009. It is estimated that the remaining 5% collectively represents 225 hectares (556 acres) of almond plantings, less than 1% of total plantings.

Results

Total Australian almond plantings are estimated at 27,903 hectares (68,950 acres). Detailed survey data totals 27,678 hectares (68,394 acres), comprising 18,668 bearing hectares (46,129 acres) and non-bearing plantings of 9,010 hectares (22,265 acres). Consequently non-bearing plantings equate to one third of current plantings.

Nonpareil continues to be the most predominant variety, comprising approximately half of total plantings, followed by Carmel (32%) and Price (12%). Collectively these three varieties represent 95% of total Australian almond plantings.

Acknowledgements

The Almond Board of Australia wishes to extend appreciation to all almond industry members who have participated in the ABA's data collection activities.

This process was partially funded by the Australian Government through Horticulture Australia Limited (HAL).



**ALMOND
BOARD OF
AUSTRALIA**

Almond Board of Australia (ABA) is a non-profit, membership based organisation representing the interests of Australian almond growers, processors and marketers.

As the Australian Almond industry's peak body, the ABA facilitates further growth of the industry, seeks to maximise its profitability and ensure its sustainability by providing a platform for industry members to collectively respond to industry wide issues, invest in research and marketing, share knowledge, and interact with government and other stakeholders.



Know-how for Horticulture™

Australian Almond Overview



Almonds Worldwide

- Consumer demand for almonds has increased globally and this trend is expected to continue due to the positive nut health message.
- Taste, versatility and health benefits of almonds have all been major factors behind increasing worldwide consumption.
- Global almond consumption has doubled over the past decade.
- This demand growth trend is expected to continue, being led by major world producer: California, where the value of almonds exceeds US\$2.3 billion.
- Almonds are California's largest tree nut crop in total dollar value and acreage. They rank as the largest US specialty crop export, as well as the top agricultural export of the state of California with exports value of US\$1.9 billion.

Industry Growth

- The Australian almond industry has undergone rapid expansion since 2001.
- On a percentage basis, Australia is the fastest growing almond industry in the world.
- In 2008, Australia produced 3% of world almonds, with major world producer being California (85%).
- It is forecast that Australia will surpass Spain (6%) to become the world's second largest almond producer within the next few years.

Producing Regions

Australian almonds are predominantly grown along the Murray River corridor, across three states:

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

Australia has four major almond growing regions:

- Adelaide
- Riverland
- Riverina
- Sunraysia



Value of Almonds

- The Australian almond industry has a current estimated value of greater than \$250 million, with related exports of \$121 million.
- Additional production from newly planted orchards is expected to double the industry's current value to an estimated \$570 million by 2015.
- The growing, harvesting, transporting, storage, processing, value adding and marketing of almonds is a major contributor to the economic and social wellbeing of the Sunraysia district in Victoria and the Riverland of South Australia.

Almond Plantings

- Total Australian almond acreage has increased six-fold over the past nine years: 4,595 hectares (11,352 acres) in 2000 to more than 27,678 hectares (68,394 acres) in 2009.
- Approximately one quarter of Australian almond plantings have reached full maturity (eight years and older). One third of total Australian almond plantings are non-bearing (less than three years).
- 90% of total almond plantings are drip irrigated, with less than 10% under sprinkler irrigation.

Almond Production

- Australian almond production in 2009 totalled just over 36,500 tonnes (kernel).
- Future production increases will occur as young plantings reach full maturity, bringing productive capacity to greater than 80,000 tonnes by 2015, more than double that of 2009 production.

Investment in Almonds

- Almonds have become an attractive crop for investors because the industry has proven to be profitable and stable over the longer term.
- Reasons for this include the ability to develop and manage orchards on a larger scale, together with the development of new growing technologies that have enhanced profitability and maintained international competitiveness.

Almond Plantings

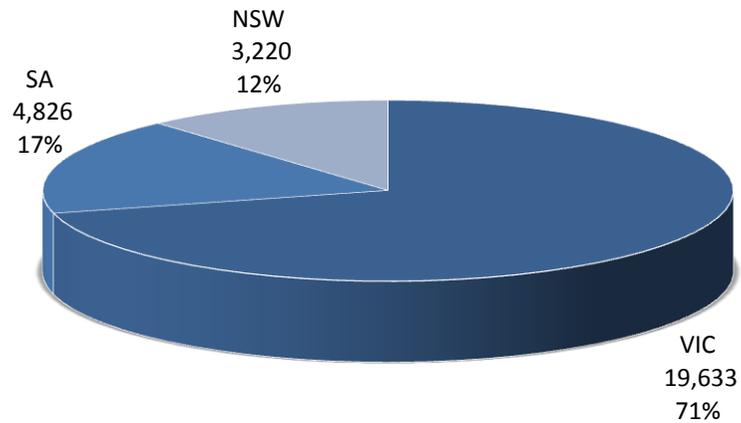


Almond Plantings by Variety (Hectares)

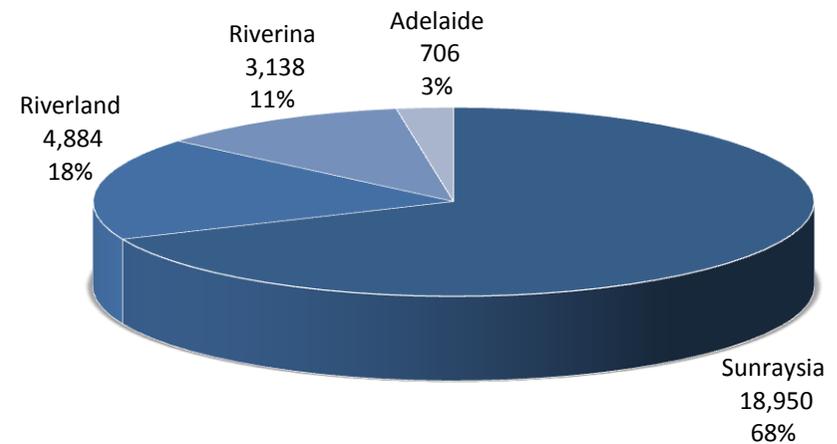
Variety	Pre 2000	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Bearing	Non-B	Total	%
Baxendale	89											89	0	89	0%
Butte	0							3	35	3		3	38	41	0%
Carmel	726	259	536	177	506	801	810	1,900	2,383	606	89	5,715	3,078	8,792	32%
Fritz	120	4	2									126	0	126	0%
Johnston	34	2	2					0				38	0	38	0%
Keane	14	2	7	5	17	7		4	14	4	2	56	20	76	0%
Mission	104											104	0	104	0%
Monterey	0			7	1	6	15	66	70	16	65	95	151	246	1%
Ne Plus	228	16	10		1	0	0	0				254	0	254	1%
Nonpareil	1,908	409	815	323	831	1,223	1,274	2,757	3,417	856	229	9,542	4,502	14,044	51%
Other	44	1	3	0	0	0	0	0	0	0	3	48	3	51	0%
Padre	0							3	35	3		3	38	41	0%
Peerless	141	46	21	23	29	31	24	54	53	8	2	367	62	429	2%
Price	238	91	211	75	229	288	363	735	871	235	12	2,230	1,118	3,349	12%
TOTAL	3,648	829	1,608	609	1,614	2,356	2,480	5,516	6,878	1,731	401	18,668	9,010	27,678	100%
%	13%	3%	6%	2%	6%	9%	9%	20%	25%	6%	1%	67%	33%	100%	

Note: Totals may not add due to rounding

Almond Hectares by State



Almond Hectares by Region

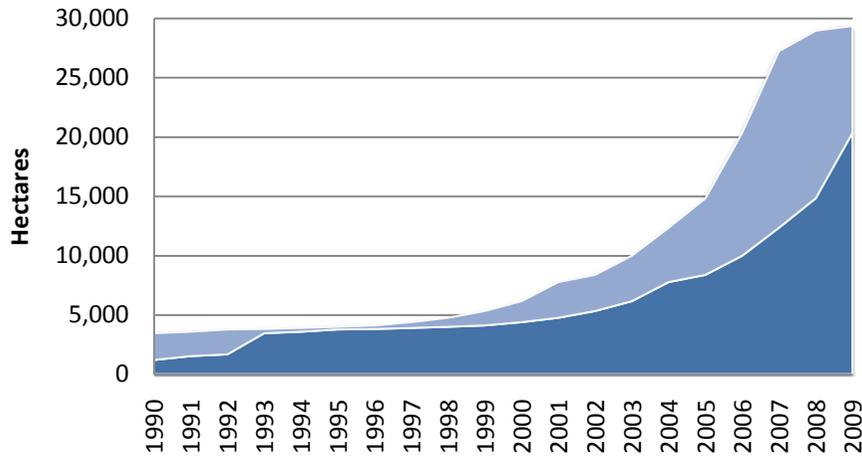


Almond Plantings

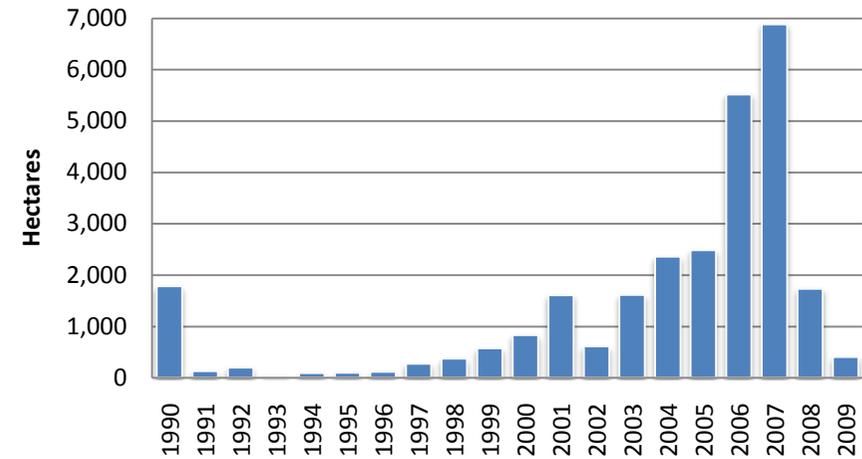


Australian Almond Plantings

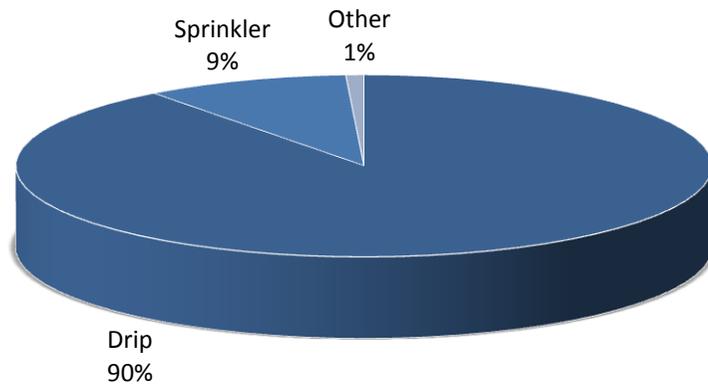
■ Bearing ■ Non Bearing



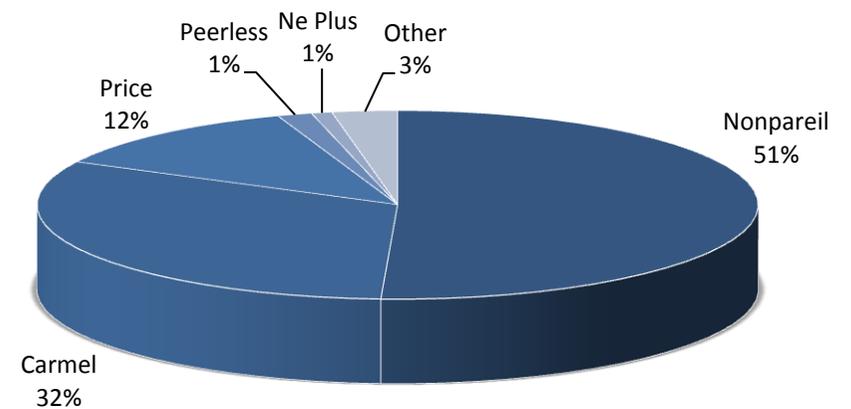
Age Distribution of Plantings



Almond Plantings by Irrigation



Almond Plantings by Variety



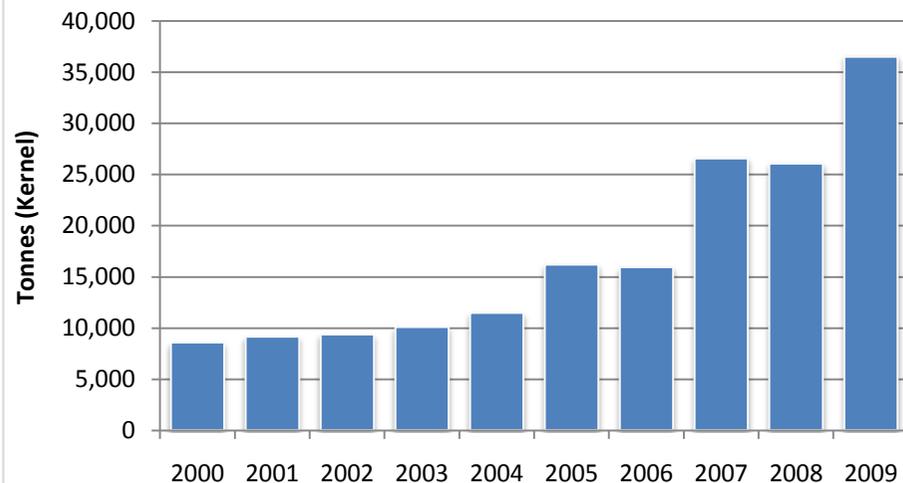
Almond Production



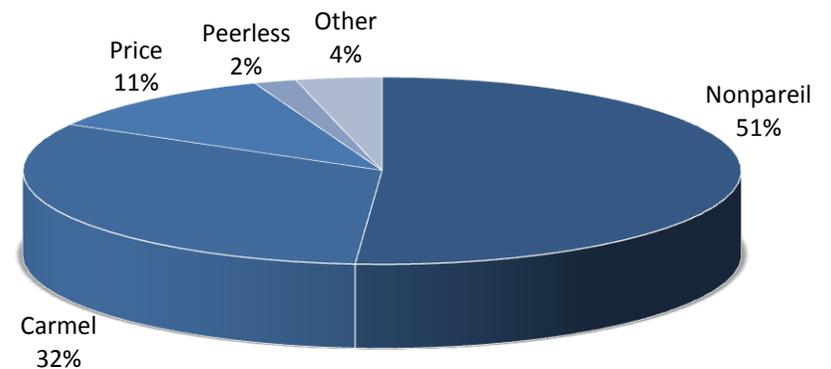
Almond Production by Variety (Tonnes Kernel)

Variety	2002		2003		2004		2005		2006		2007		2008		2009	
Baxendale	250	3%	221	2%	189	2%	210	1%	163	1%	230	1%	168	1%	173	0%
Carmel	1,577	17%	1,840	18%	2,483	22%	3,807	24%	4,246	27%	7,383	28%	7,996	31%	11,681	32%
Chellaston	51	1%	43	0%	43	0%	42	0%	59	0%	62	0%	23	0%	33	0%
Fritz	284	3%	309	3%	288	3%	321	2%	249	2%	331	1%	240	1%	151	0%
Johnston	23	0%	24	0%	20	0%	16	0%	30	0%	36	0%	35	0%	47	0%
Keane	46	0%	58	1%	62	1%	79	0%	112	1%	132	0%	70	0%	69	0%
Mission	322	3%	325	3%	293	3%	333	2%	273	2%	314	1%	250	1%	196	1%
Monterey	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	42	0%	97	0%
Ne Plus	585	6%	635	6%	593	5%	616	4%	594	4%	823	3%	527	2%	443	1%
Nonpareil	5,265	56%	5,427	54%	6,028	53%	8,691	54%	7,989	50%	13,751	52%	13,430	52%	18,686	51%
Peerless	340	4%	384	4%	558	5%	466	3%	491	3%	609	2%	597	2%	693	2%
Price	318	3%	399	4%	474	4%	936	6%	903	6%	2,037	8%	2,338	9%	4,023	11%
Other	300	3%	429	4%	442	4%	660	4%	802	5%	848	3%	342	1%	209	1%
TOTAL	9,361	100%	10,093	100%	11,474	100%	16,178	100%	15,917	100%	26,555	100%	26,060	100%	36,500	100%

Australian Almond Production



2009 Almond Production by Variety

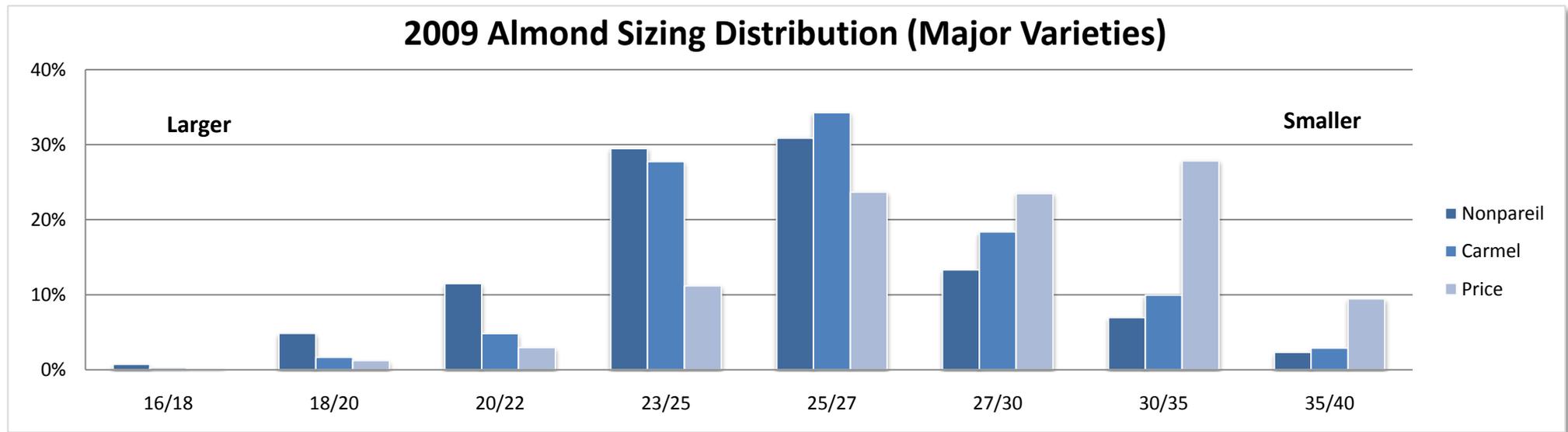
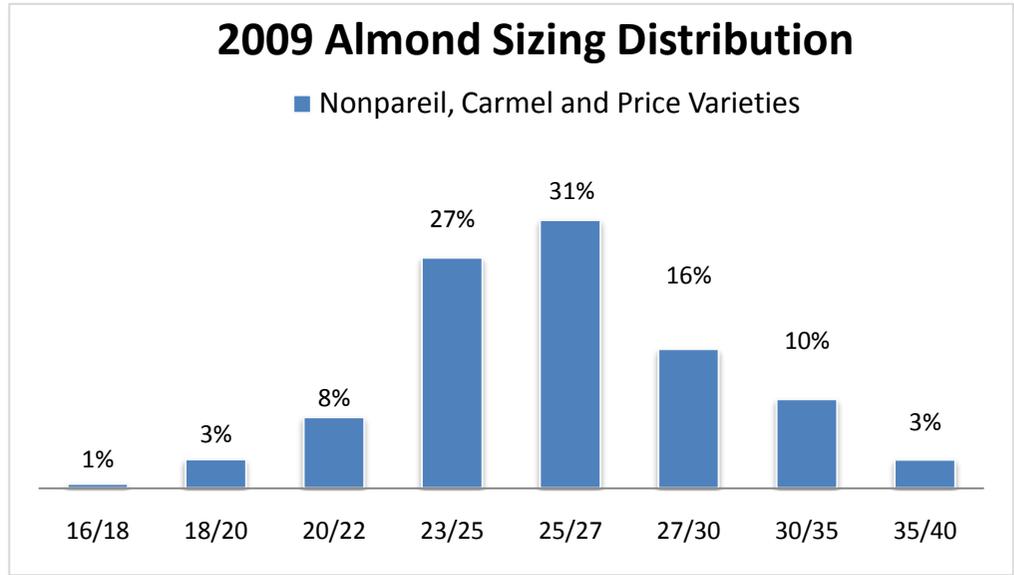


Almond Sizing



2009 Almond Sizing Distribution

VARIETY / SIZE	AVG COUNT	NONPAREIL	CARMEL	PRICE	WEIGHTED TOTAL
16/18	17.0	1%	0%	0%	1%
18/20	19.0	5%	2%	1%	3%
20/22	21.0	11%	5%	3%	8%
23/25	22.0	29%	28%	11%	27%
25/27	26.0	31%	34%	24%	31%
27/30	28.0	13%	18%	23%	16%
30/35	32.5	7%	10%	28%	10%
35/40	37.5	2%	3%	9%	3%
TOTAL		100%	100%	100%	100%
AVERAGE SIZE		24.83	25.85	28.67	25.61



Almond Projections



Australian Almond Projections

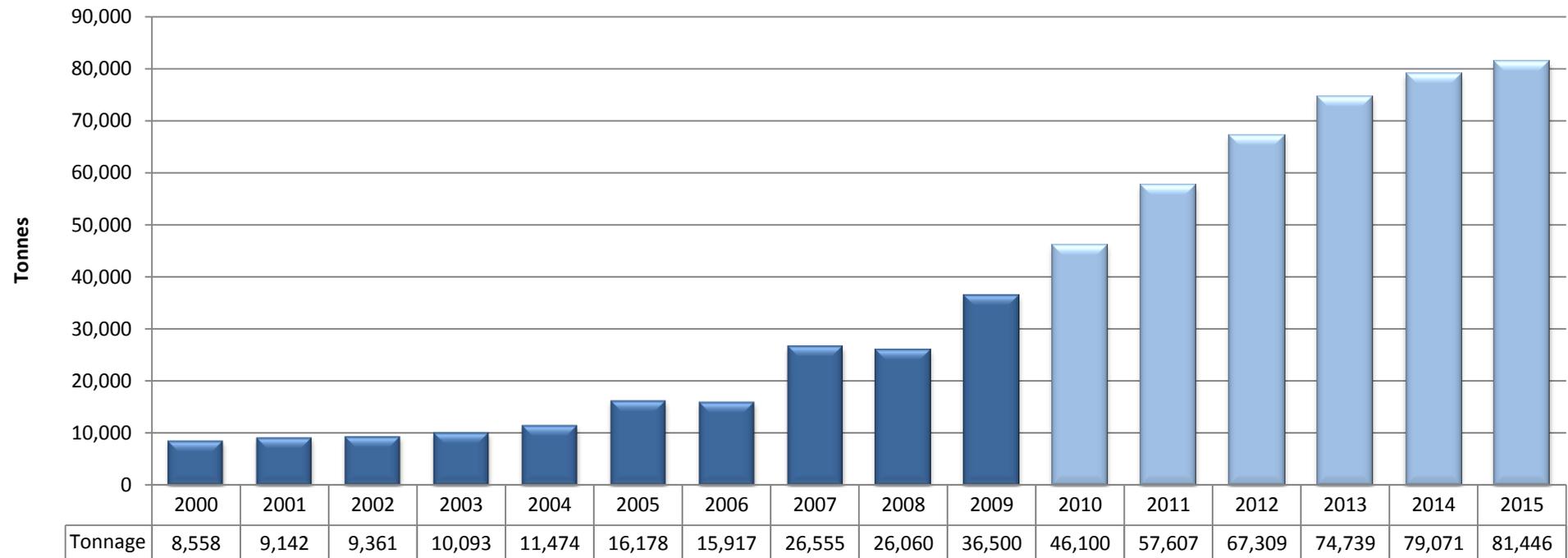
(based on current plantings only)

Bearing Plantings	2009	2010	2011	2012	2013	2014	2015	2016	2017
Hectares	18,668	25,546	27,277	27,678	27,678	27,678	27,678	27,678	27,678
Acres	46,129	63,125	67,402	68,394	68,394	68,394	68,394	68,394	68,394
Production, Tonnes	36,500	46,100	57,607	67,309	74,793	79,071	81,446	81,973	82,073
Value, \$m	\$256	\$319	\$403	\$471	\$523	\$553	\$570	\$574	\$575

Industry Average Production Factors

Tree Age (Yrs)	Tonnes/Acre	Tonnes/Hectare
8+	1.20	2.97
7	1.10	2.72
6	1.00	2.47
5	0.75	1.85
4	0.55	1.36
3	0.20	0.49
2	0.00	0.00
1	0.00	0.00
Planting	0.00	0.00

Australian Almond Production (Actual and Projected)



Almond Exports

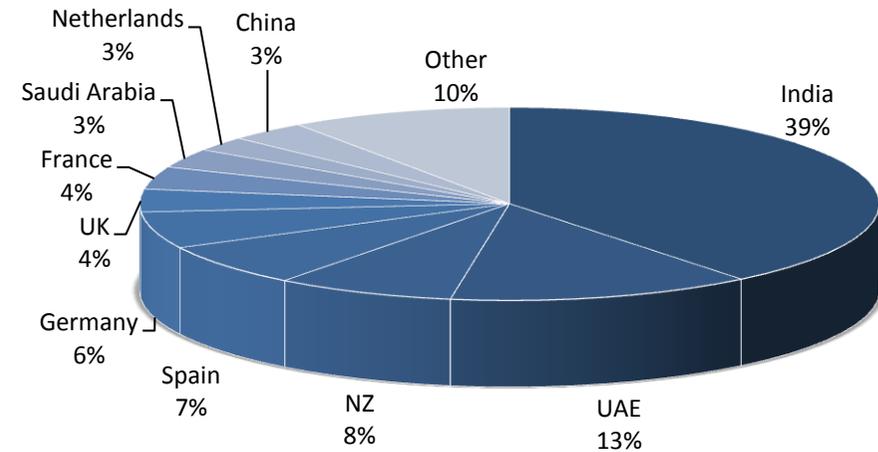


Australian Almond Exports 2008/09

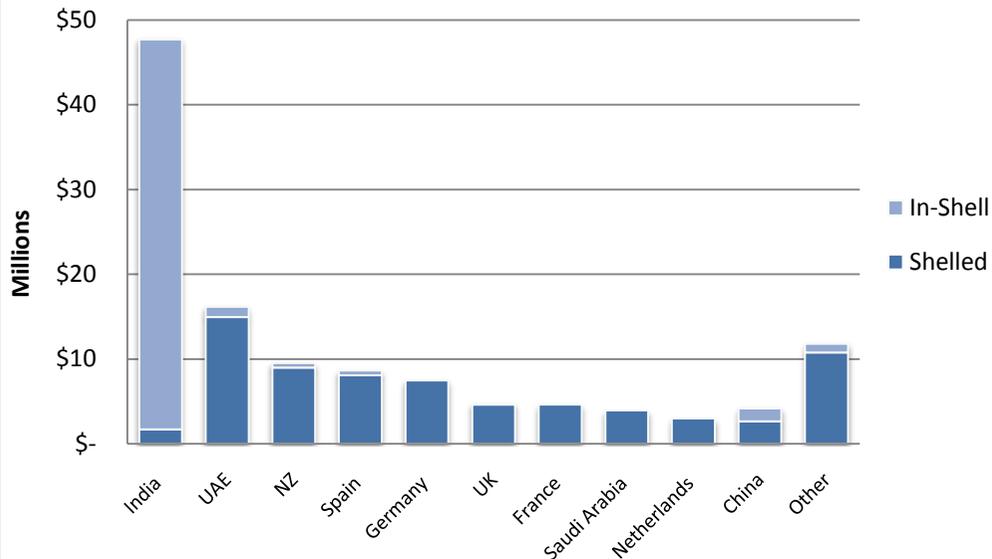
Top 10 Export Markets	Shelled (Kg)	AU\$ Value	In-Shell (Kg)	AU\$ Value	Total AU\$ Value
India	341,470	\$1,691,385	12,491,814	\$45,999,849	\$47,691,234
UAE	3,099,894	\$14,934,012	271,482	\$1,223,187	\$16,157,199
NZ	1,345,837	\$8,984,122	178,950	\$519,689	\$9,503,811
Spain	1,822,180	\$8,062,013	128,783	\$547,289	\$8,609,302
Germany	1,321,737	\$7,469,073			\$7,469,073
UK	751,694	\$4,617,357	10,659	\$21,124	\$4,638,481
France	1,031,634	\$4,604,853			\$4,604,853
Saudi Arabia	851,359	\$3,921,470			\$3,921,470
Netherlands	576,714	\$2,959,997			\$2,959,997
China	481,946	\$2,648,221	431,800	\$1,510,043	\$4,158,264
Other	2,098,800	\$10,760,307	196,801	\$1,028,398	\$11,788,705
Total Exports	13,723,266	\$70,652,810	13,710,289	\$50,849,579	\$121,502,389

Source: ABS

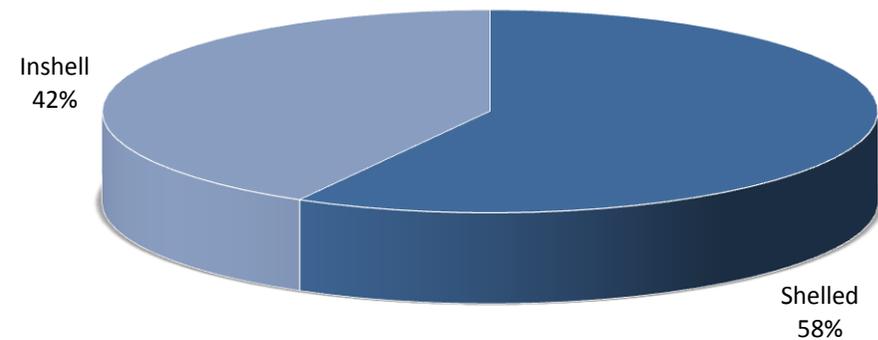
2008/09 Almond Exports (Value)



2008/09 Almond Exports (Value)



2008/09 Almond Exports (Value)



Global Almonds



Commercial Almond Production in Major Producing Countries

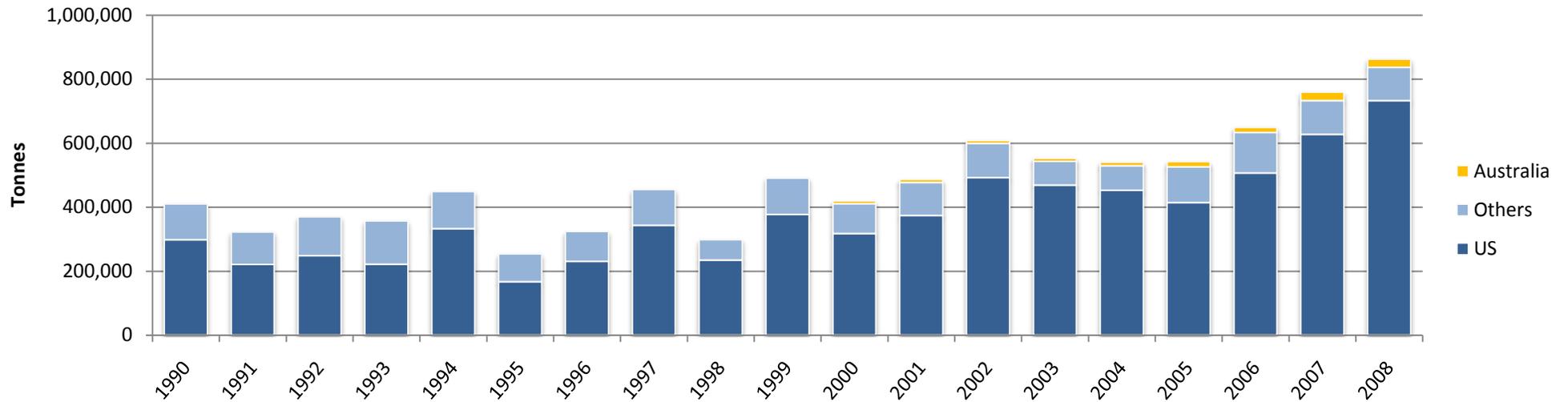
YEAR	AUS		CHINA		CHILE		GREECE		INDIA		ITALY		SPAIN		TURKEY		USA		TOTAL		% USA	% AUS
	lbs (mill)	Tonnes	lbs (mill)	Tonnes	%	%																
1990	0.0	0	0.0	0	0.0	0	34.2	15,500	0.0	0	41.9	19,000	137.8	62,500	33.1	15,000	656.1	297,602	903.0	409,602	72.66%	0.00%
1991	0.0	0	0.0	0	0.0	0	24.3	11,000	0.0	0	24.3	11,000	142.2	64,500	33.7	15,300	485.9	220,401	710.3	322,201	68.40%	0.00%
1992	0.0	0	0.0	0	0.0	0	35.3	16,000	0.0	0	39.7	18,000	158.7	72,000	34.6	15,700	545.9	247,616	814.2	369,316	67.05%	0.00%
1993	0.0	0	0.0	0	0.0	0	44.1	20,000	0.0	0	33.1	15,000	185.2	84,000	35.3	16,000	488.2	221,444	785.8	356,444	62.13%	0.00%
1994	0.0	0	0.0	0	0.0	0	35.3	16,000	0.0	0	30.9	14,000	154.9	70,260	34.6	15,700	732.9	332,438	988.5	448,398	74.14%	0.00%
1995	0.0	0	0.0	0	0.0	0	28.7	13,000	0.0	0	33.1	15,000	99.9	45,300	30.2	13,700	366.7	166,332	558.5	253,332	65.66%	0.00%
1996	0.0	0	0.0	0	0.0	0	28.2	12,800	0.0	0	13.2	6,000	132.3	60,000	31.5	14,300	507.5	230,198	712.8	323,298	71.20%	0.00%
1997	0.0	0	0.0	0	0.0	0	32.0	14,500	0.0	0	24.3	11,000	165.3	75,000	24.3	11,000	756.5	343,143	1,002.3	454,643	75.48%	0.00%
1998	0.0	0	0.0	0	0.0	0	26.5	12,000	0.0	0	19.8	9,000	66.1	30,000	26.5	12,000	517.0	234,507	655.9	297,507	78.82%	0.00%
1999	0.0	0	0.0	0	0.0	0	37.5	17,000	0.0	0	37.5	17,000	145.5	66,000	30.9	14,000	829.9	376,436	1,081.2	490,436	76.76%	0.00%
2000	18.9	8,558	0.0	0	0.0	0	34.2	15,513	0.0	0	22.0	9,979	116.8	52,980	34.2	15,513	698.4	316,789	924.5	419,331	75.55%	2.04%
2001	20.2	9,142	0.0	0	0.0	0	28.7	13,018	2.2	998	39.7	18,008	125.7	57,017	30.9	14,016	824.1	373,805	1,071.5	486,004	76.91%	1.88%
2002	20.6	9,361	0.0	0	0.0	0	37.5	17,010	2.4	1,089	19.8	8,981	145.5	65,998	30.9	14,016	1,083.7	491,558	1,340.4	608,012	80.85%	1.54%
2003	22.3	10,093	0.0	0	0.0	0	22.0	9,979	2.2	998	11.0	4,990	97.0	43,998	30.2	13,698	1,032.9	468,516	1,217.6	552,272	84.83%	1.83%
2004	25.3	11,474	0.2	91	16.5	7,500	37.5	17,000	2.4	1,089	26.5	12,000	57.7	26,181	27.1	12,300	998.0	452,685	1,191.2	540,319	83.78%	2.12%
2005	35.7	16,178	2.2	1,000	15.4	7,003	30.9	14,016	2.5	1,152	26.5	12,000	140.0	63,484	30.2	13,698	911.7	413,540	1,195.1	542,072	76.29%	2.98%
2006	35.1	15,917	0.4	200	15.2	6,913	33.1	15,014	2.6	1,197	13.2	6,000	182.0	82,554	31.7	14,400	1,116.7	506,527	1,430.2	648,721	78.08%	2.45%
2007	58.5	26,555	2.9	1,334	19.4	8,818	22.0	9,997	2.2	1,016	26.5	12,038	125.0	56,717	34.2	15,513	1,383.0	627,318	1,674.0	759,306	82.62%	3.50%
2008	57.5	26,060	0.9	408	20.9	9,480	26.5	12,020	2.6	1,179	26.5	12,020	116.0	52,617	35.3	16,012	1,614.6	732,370	1,900.8	862,167	84.95%	3.02%

Source: ABC, UDSA

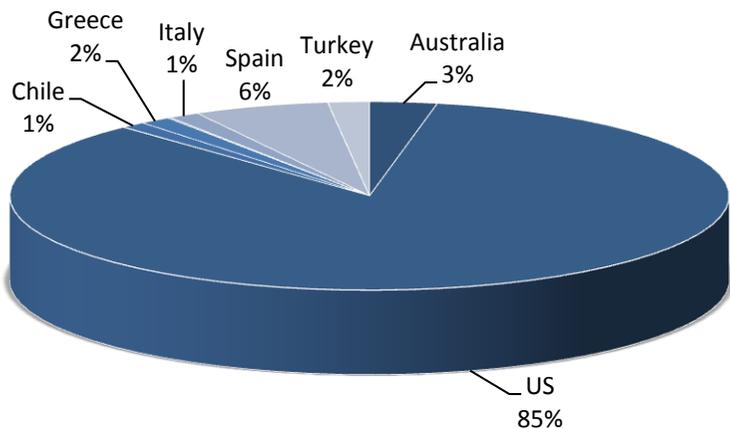
Global Almonds



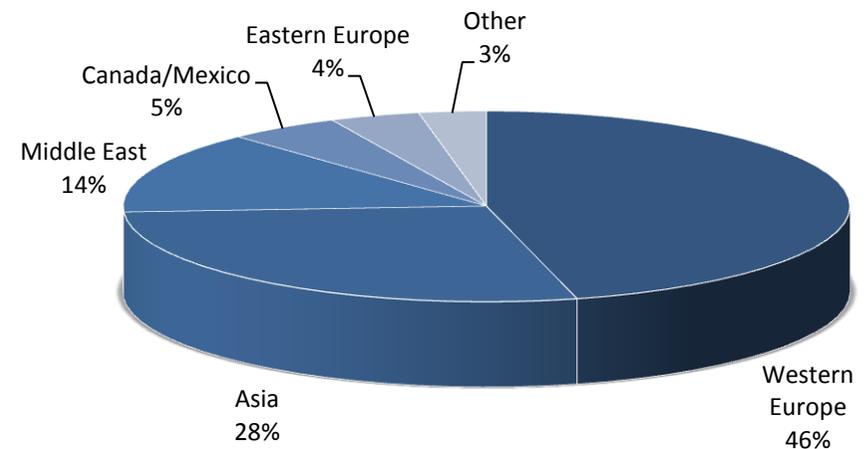
Australia's Contribution to Global Almond Production



World Almond Production 2008



US Almond Exports 2008/09





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AUSTRALIAN
ALMONDS

Australian Almond Statistics

2010 Report





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Data Collection

In 2005, the Almond Board of Australia (ABA) embarked on an Industry Statistics Collection Program to facilitate the dissemination of accurate and timely information with respect to the Australian Almond Industry.

A major component of this program is an annual survey of Australian almond growers, intended to collect and update current planting data.

This report provides an overview of planting survey results. **It should be noted that this planting data does not account for plantings in previous years that have since been removed.**

Results

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

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

Acknowledgements

The Almond Board of Australia wishes to extend appreciation to all industry members who have participated in the ABA's data collection activities.



This process was partially funded by the Australian Government through Horticulture Australia Limited.

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The Almond Board of Australia (ABA) is a non-profit, membership based organisation representing the interests of Australian almond growers, processors and marketers.

As the Australian Almond industry's peak industry body, the Almond Board of Australia facilitates further growth of the industry, seeks to maximise its profitability and ensure its sustainability by providing a platform for industry members to collectively respond to industry wide issues, invest in research and marketing, share knowledge, and interact with government and other stakeholders.

Information in this report has been sourced from the ABA's internal data collection activities, the Almond Board of California (ABC), the United States Department of Agriculture (USDA) Horticulture Australia Limited (HAL) and the Australian Bureau of Statistics (ABS).

Procedure

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

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

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



Demand for Almonds

- Consumer demand for almonds has increased globally and this trend is expected to continue due to the positive nut health message.
- Taste, versatility and health benefits of almonds have all been major factors behind increasing worldwide consumption.
- Global almond consumption has more than doubled over the past decade from nearly 291,000 tonnes in 1998 to 583,000 tonnes in 2008.
- This demand growth trend is expected to continue, being led by dominant world producer, California, where the value of almonds exceeds US\$2.3 billion.
- Almonds are California's largest agricultural export and the major US horticultural export, valued at greater than US\$1.9 billion.

Industry Growth

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

Growing Regions

Australian almonds are predominantly grown across four Australian states:

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

Australia has five major almond growing regions:

- Adelaide
- Riverland
- Riverina
- Sunraysia
- WA



Value of Almonds

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

Almond Plantings

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

Almond Production

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

Investment in Almonds

- Almonds have become an attractive crop for investors because the industry has proven to be profitable and stable over the longer term.
- Reasons for this include the ability to develop and manage orchards on a larger scale, together with the development of new growing technologies that have enhanced profitability and maintained international competitiveness.

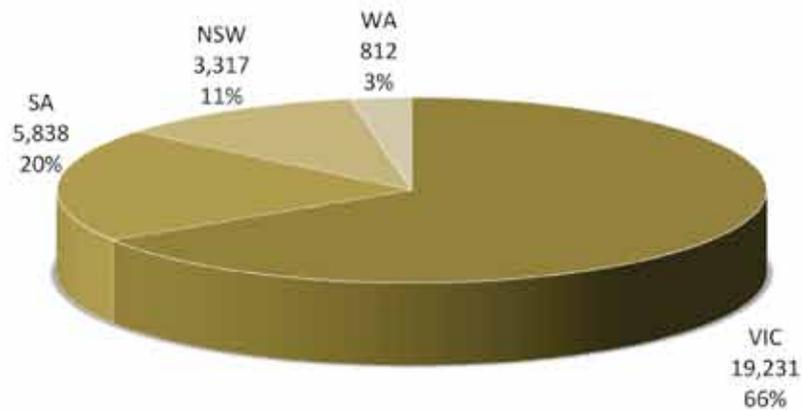


Almond Plantings

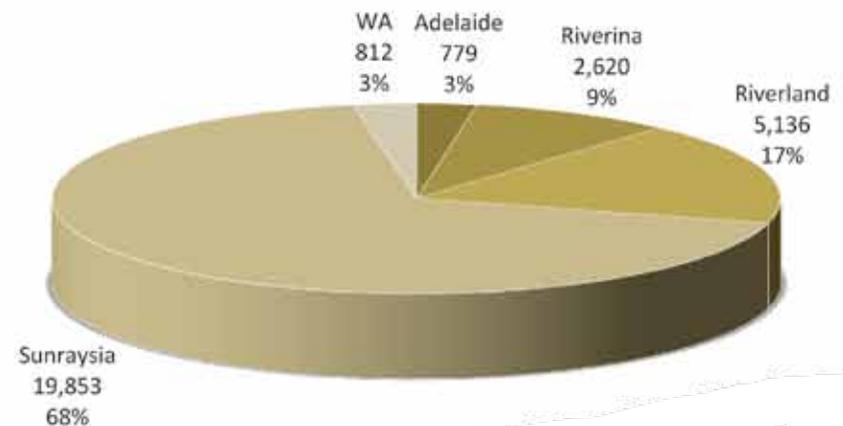
Almond Plantings by Variety (Hectares)

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

Almond Hectares by State



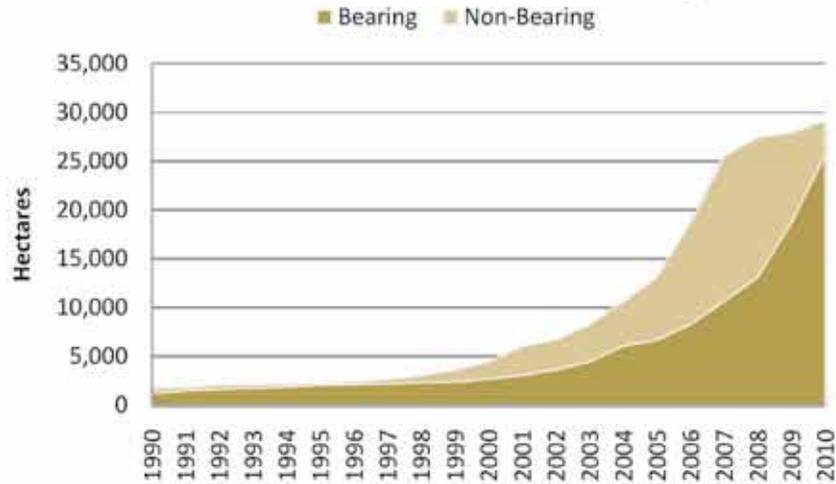
Almond Hectares by Region



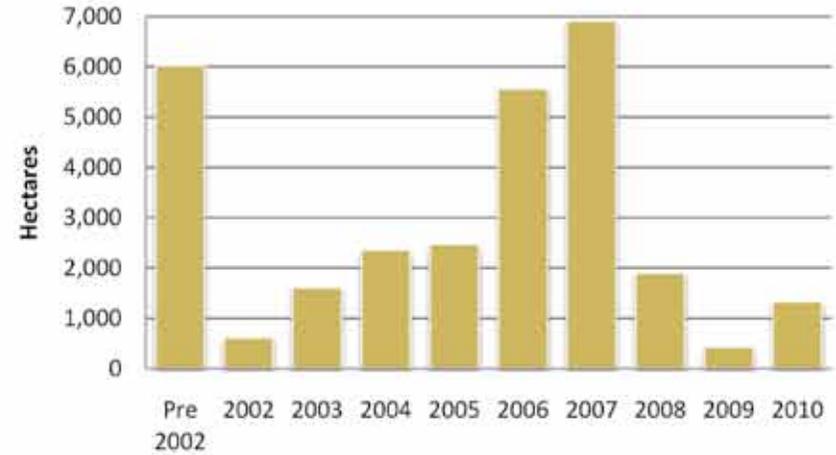
Almond Plantings



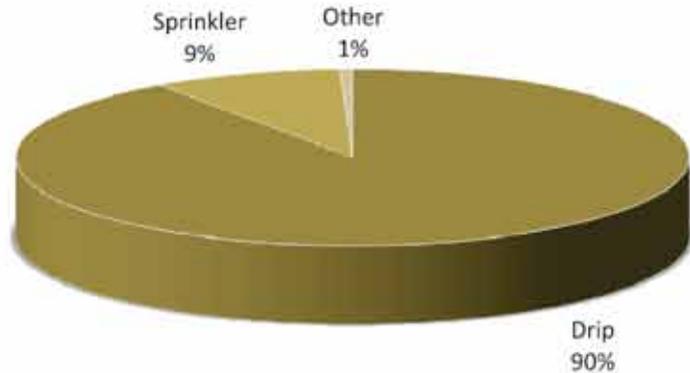
Australian Almond Plantings



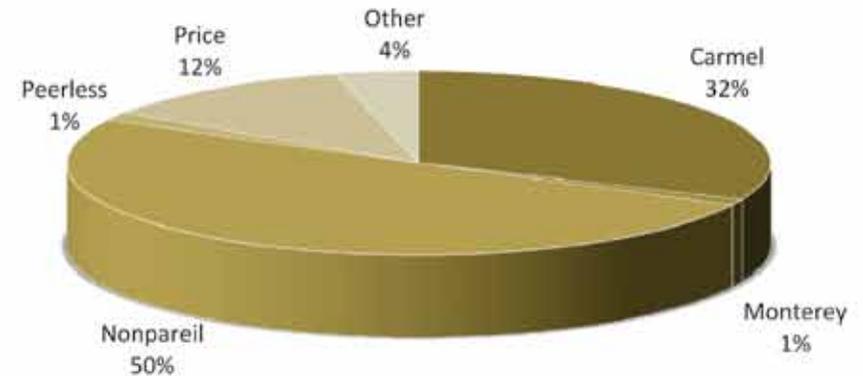
Age Distribution of Plantings



Almond Plantings by Irrigation



Almond Plantings by Variety



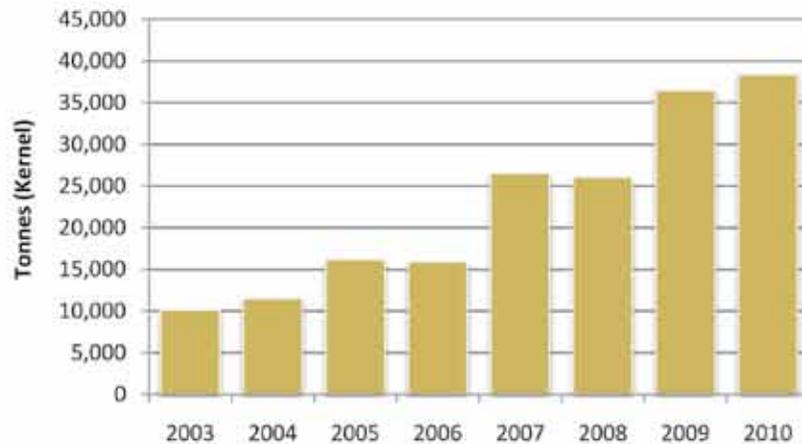


Almond Production

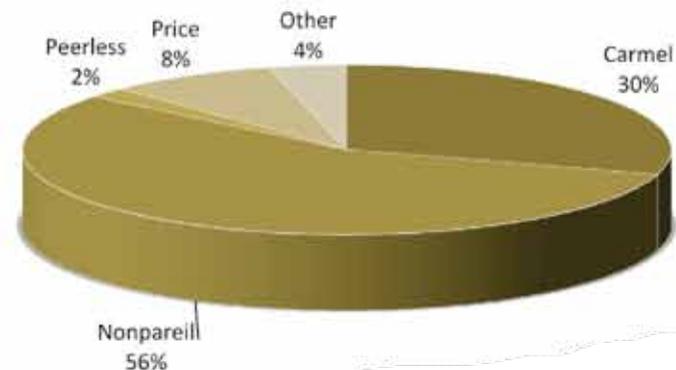
Almond Production by Variety (Tonnes Kernel)

Variety	2002		2003		2004		2005		2006		2007		2008		2009		2010	
Baxendale	250	3%	221	2%	189	2%	210	1%	163	1%	230	2%	168	1%	173	0%	159	0%
Carmel	1,577	17%	1,840	18%	2,483	22%	3,807	24%	4,246	27%	7,383	28%	7,996	31%	11,681	31%	11,401	30%
Chellaston	51	1%	43	0%	43	0%	42	0%	59	0%	62	0%	23	0%	33	0%	17	0%
Fritz	284	3%	309	3%	288	3%	321	2%	249	2%	331	1%	240	1%	151	0%	199	1%
Johnston	23	0%	24	0%	20	0%	16	0%	30	0%	36	0%	35	0%	47	0%	24	0%
Keane	46	0%	56	2%	62	1%	79	0%	112	1%	132	0%	70	0%	69	0%	79	0%
Mission	322	3%	325	3%	293	3%	333	2%	273	2%	314	1%	250	1%	196	1%	155	0%
Monterey	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	42	0%	97	0%	181	0%
Ne Plus	585	6%	635	6%	593	5%	616	4%	594	4%	823	3%	527	2%	443	1%	424	1%
Nonpareil	5,265	56%	5,427	54%	6,028	53%	8,691	54%	7,989	50%	13,751	52%	13,430	52%	18,686	51%	21,496	56%
Peerless	340	4%	384	4%	558	5%	466	3%	491	3%	609	2%	597	2%	693	2%	750	2%
Price	318	3%	399	4%	474	4%	936	6%	903	6%	2,037	8%	2,338	9%	4,023	11%	3,236	8%
Other*	300	3%	429	4%	442	4%	660	4%	802	5%	848	3%	342	1%	209	1%	223	1%
TOTAL	9,361	100%	10,094	100%	11,473	100%	16,177	100%	15,911	100%	26,556	100%	26,058	100%	36,501	100%	38,344	100%

Australian Almond Production



2010 Almond Production by Variety



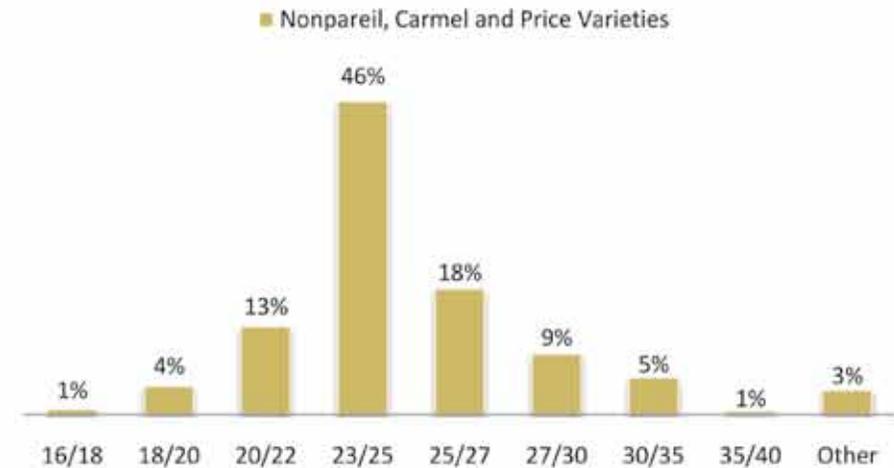
Almond Production



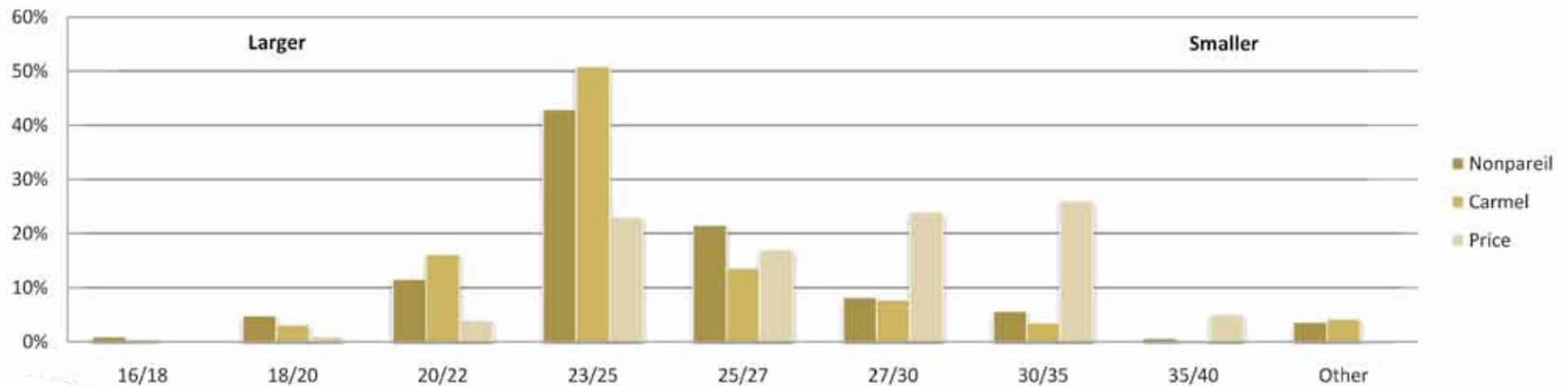
2010 Almond Sizing Distribution

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

2010 Almond Sizing Distribution



2010 Almond Sizing Distribution (Major Varieties)





Almond Projections

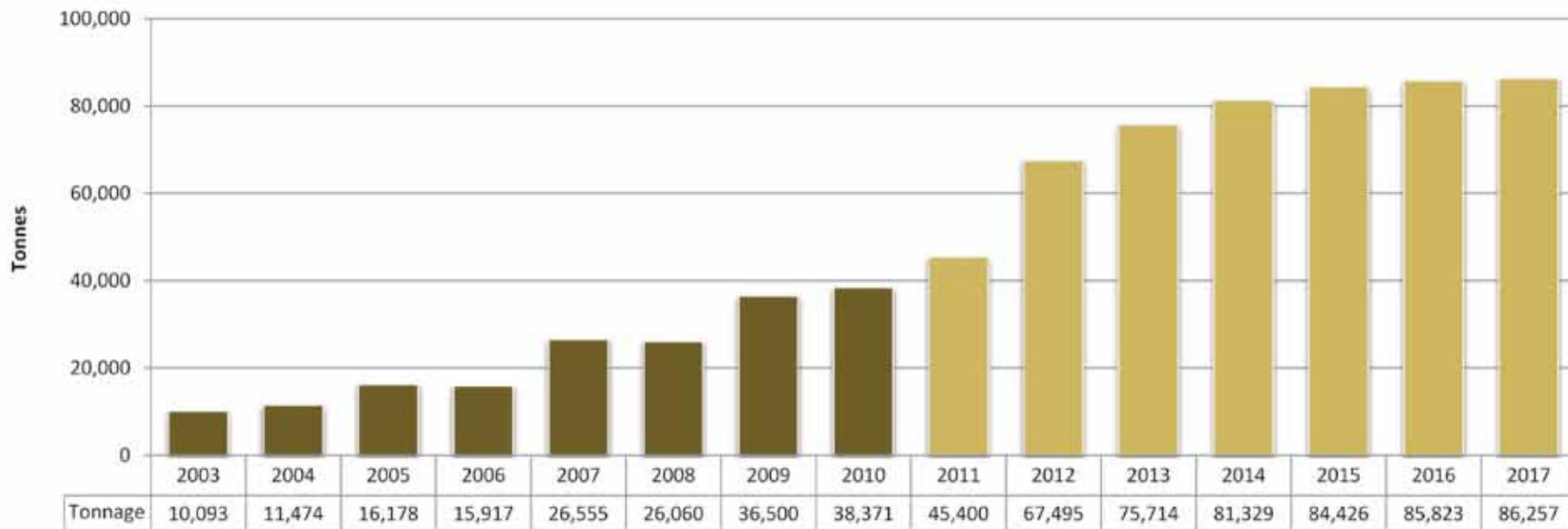
Australian Almond Projections (based on current plantings only)

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

Industry Production Factors

Tree Age (Yrs)	Tonnes/Acre	Tonnes/Hectare
8+	1.20	2.97
7	1.10	2.72
6	1.00	2.47
5	0.75	1.85
4	0.55	1.36
3	0.20	0.49
2	0.00	0.00
1	0.00	0.00
Planting	0.00	0.00

Australian Almond Production Projections



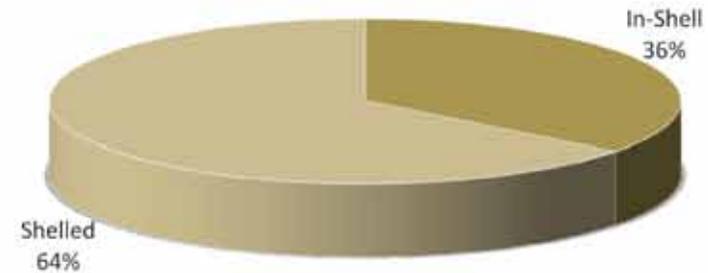
Almond Exports



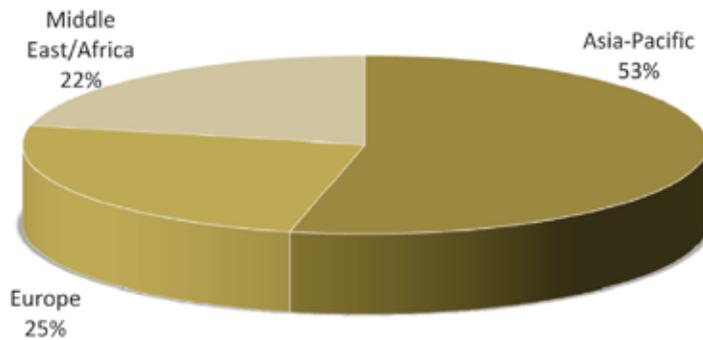
Australian Almond Exports 2009/10

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

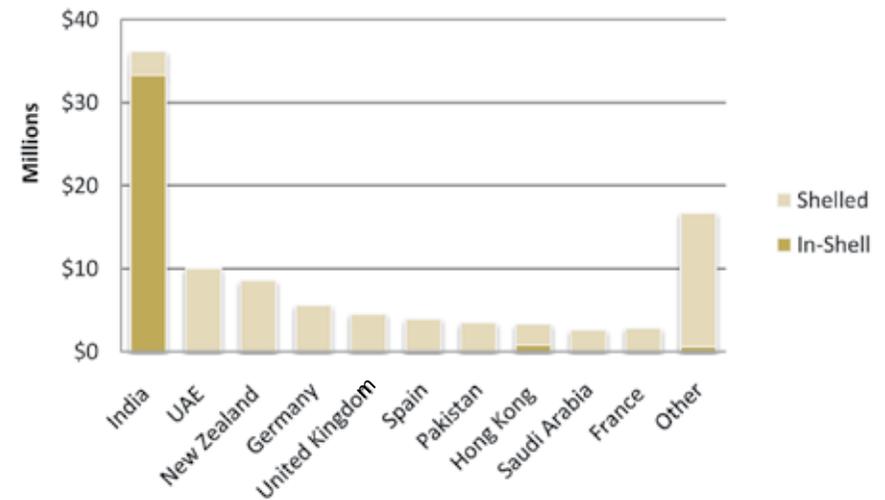
2009/10 Almond Exports (Value)



Almond Exports by Region 2009/10



2009/10 Almond Exports (Value)



Source: ABS



Global Almonds

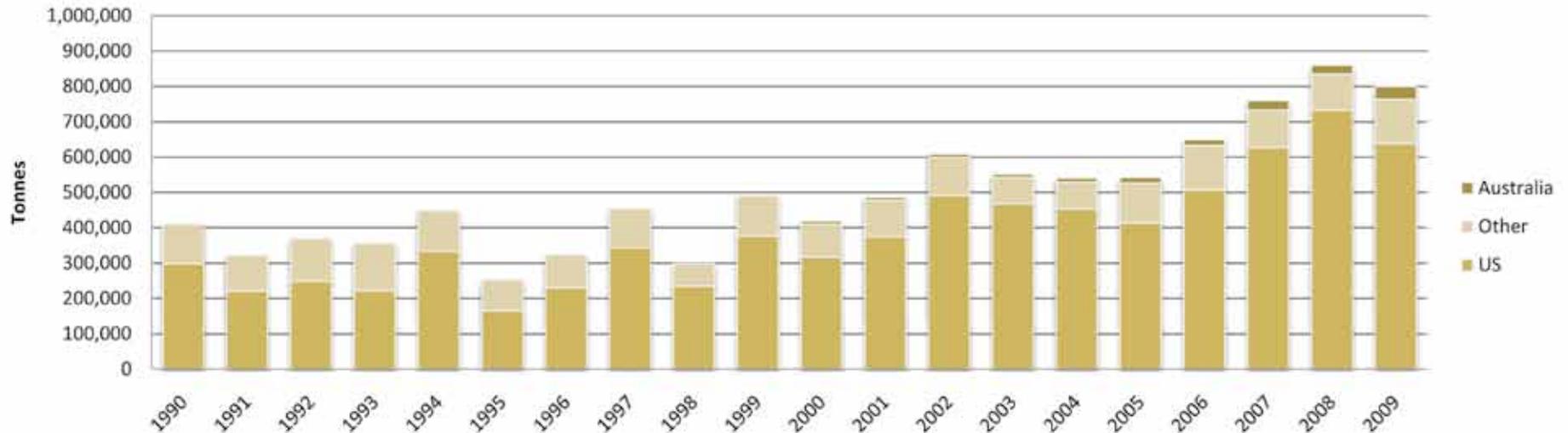
Global Almond Production

YEAR	AUS		CHILE		CHINA		GREECE		INDIA		ITALY		SPAIN		TURKEY		US		TOTAL		% US	% AUS
	lbs (mil)	Tonnes	lbs (mil)	Tonnes	%	%																
1990							34.2	15,513			41.9	19,006	137.8	62,505	33.1	15,014	656.0	297,557	903.0	409,595	72.65%	0.00%
1991							24.3	11,022			24.3	11,022	142.2	64,501	33.7	15,286	486.0	220,446	710.5	322,277	68.40%	0.00%
1992							35.3	16,012			39.7	18,008	158.7	71,985	34.6	15,694	546.0	247,661	814.3	369,360	67.05%	0.00%
1993							44.1	20,003			33.1	15,014	186.2	84,005	35.3	16,012	488.0	221,353	785.7	356,387	62.11%	0.00%
1994							35.3	16,012			30.9	14,016	154.9	70,261	34.6	15,694	733.0	332,483	988.7	448,467	74.14%	0.00%
1995							28.7	13,018			33.1	15,014	99.9	45,314	30.2	13,698	366.0	166,015	557.9	253,059	65.60%	0.00%
1996							28.2	12,791			13.2	5,987	132.3	60,010	31.5	14,288	508.0	230,425	713.2	323,501	71.23%	0.00%
1997							32.0	14,515			24.3	11,022	166.3	74,979	24.3	11,022	757.0	343,369	1,002.9	454,907	75.48%	0.00%
1998							26.5	12,020			19.8	8,981	66.1	29,982	26.5	12,020	517.0	234,507	655.9	297,510	78.82%	0.00%
1999							37.5	17,010			37.5	17,010	145.5	65,998	30.9	14,016	830.0	376,482	1,081.4	490,516	76.75%	0.00%
2000	18.9	8,573					34.2	15,513			22.0	9,979	116.8	52,980	34.2	15,513	698.4	316,789	924.5	419,347	75.54%	2.04%
2001	20.2	9,163					28.7	13,018	2.2	998	39.7	18,008	125.7	57,017	30.9	14,016	824.1	373,805	1,071.5	486,025	76.91%	1.89%
2002	20.6	9,344					37.5	17,010	2.4	1,089	19.8	8,981	145.5	65,998	30.9	14,016	1,083.7	491,558	1,340.4	607,996	80.85%	1.54%
2003	22.3	10,115					22.0	9,979	2.2	998	11.0	4,990	97.0	43,998	30.2	13,698	1,032.9	468,516	1,217.6	552,294	84.83%	1.83%
2004	25.3	11,476	16.5	7,484	0.2	91	37.5	17,010	2.4	1,089	26.5	12,020	57.7	26,172	27.1	12,292	998.0	452,685	1,191.2	540,319	83.78%	2.12%
2005	35.7	16,193	15.4	6,985	2.2	998	30.9	14,016	2.5	1,134	26.5	12,020	140.0	63,503	30.2	13,698	911.7	413,540	1,195.1	542,087	76.29%	2.99%
2006	35.1	15,921	15.2	6,895	0.4	181	33.1	15,014	2.6	1,179	13.2	5,987	182.0	82,554	31.7	14,379	1,116.7	506,527	1,430.0	648,638	78.09%	2.45%
2007	58.5	26,535	19.4	8,800	2.9	1,315	22.0	9,979	2.2	998	26.5	12,020	125.4	56,880	34.2	15,513	1,383.0	627,318	1,674.1	759,358	82.61%	3.49%
2008	57.5	26,082	17.6	7,983	0.9	408	22.0	9,979	2.6	1,179	26.5	12,020	120.3	54,567	35.3	16,012	1,614.6	732,370	1,897.3	860,600	85.10%	3.03%
2009	60.5	36,514	14.3	6,486	3.3	1,497	18.7	8,482	2.6	1,179	13.2	5,987	188.5	85,502	35.3	16,012	1,405.9	637,706	1,762.3	799,365	79.78%	4.57%

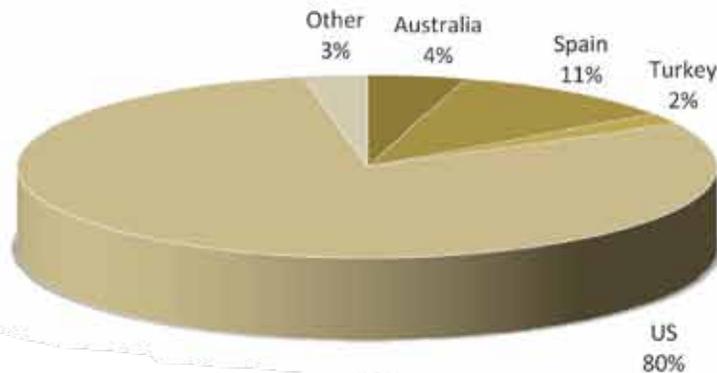
Source: ABC, USDA



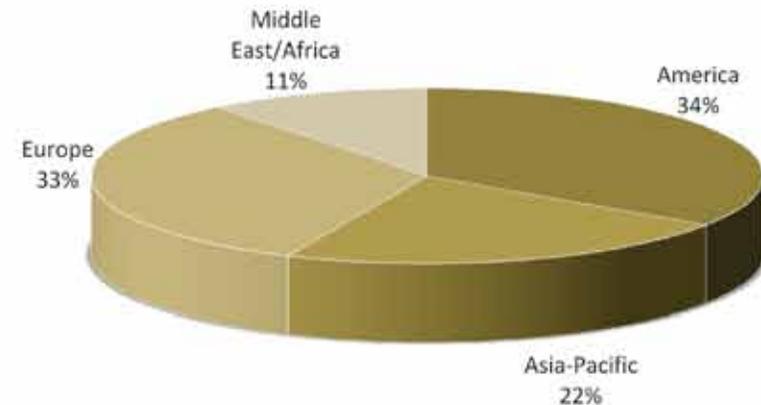
Australia's Contribution to Global Almond Production



Global Almond Production 2009



2009/10 US Almond Sales by Region





Almond Board of Australia

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Australian Almond Statistics Report 2010
can be downloaded from www.australionalmonds.com.au



In these rapidly changing times good and timely information is power. The right information, delivered in the right way, at the right time can have a significant impact on profits.

The Almond Board of Australia (ABA), in conjunction with Horticulture Australia Limited (HAL), is reviewing how we provide information to businesses in the industry – to ensure we are delivering what you need to know, in the best way.

So please take a few minutes to complete this short survey. Your input will be combined with many others, to provide a clear picture of the industry's information needs, and any gaps. From that we'll develop a plan to ensure we're doing the best possible job to support you.

How you get information?

Growers get information about growing practices, varieties, markets, industry trends legislation and government policy changes, etc in many different ways (see list below).

Please tick those that you currently use for information to assist your production and business. If there are others you use, please add them to the list. Then, in the next column, tick again the three that you find the most valuable.

Information Source	I currently use	Most Valuable (3 ONLY)
'In A Nutshell' quarterly newsletter		
'Australian Nutgrower' quarterly magazine		
Almond Production Fact Sheets (Produced by the ABA)		
Email bulletins from ABA on important matters (eg water allocation announcements)		
Annual Almond Industry Conference		
Almond Industry 'Annual Statistics Report'		
Direct visits by ABA's Industry Liaison Manager		
Field days		
Training courses		
Demonstration Trial Sites (almond production)		
ABA website		
Suppliers (eg chemical suppliers etc)		
Consultants (eg agronomists, irrigation planners etc)		
State Government Departments (eg DPI/PIRSA or similar)		
Business advisor/accountant		
Overseas publications		
Overseas websites		
Study Tours (overseas)		
Other:		

What more would you like to know?

Are there any gaps? What more information would help you manage and build your production and business? You can list whatever you think will help. In the second column, please tell us the best way to get that information to you.

<i>More Information</i>	<i>Best way to get it to me</i>		
	<i>Post</i>	<i>Fax</i>	<i>Email</i>

Current Publications

Below are listed a number of current industry publications. We are interested to know how you read them. Just tick the answer that best fits you.

<i>Publication</i>	<i>Read Carefully (cover to cover)</i>	<i>Pick out and read articles of special interest</i>	<i>Just skim through</i>	<i>Don't or rarely read</i>	<i>Don't receive</i>
'In A Nutshell' quarterly newsletter					
'Australian Nutgrower' quarterly magazine					
Almond Production Fact Sheets (Produced by the ABA)					
Almond Industry 'Annual Statistics Report'					

Your Name: _____
(optional)

Company: _____
(optional)

Please complete by Friday, January 23rd, 2009 by return email or fax to 08 8582 3503.

*Thank you for your participation in this survey.
The results will be published in a future edition of 'In A Nutshell'.*



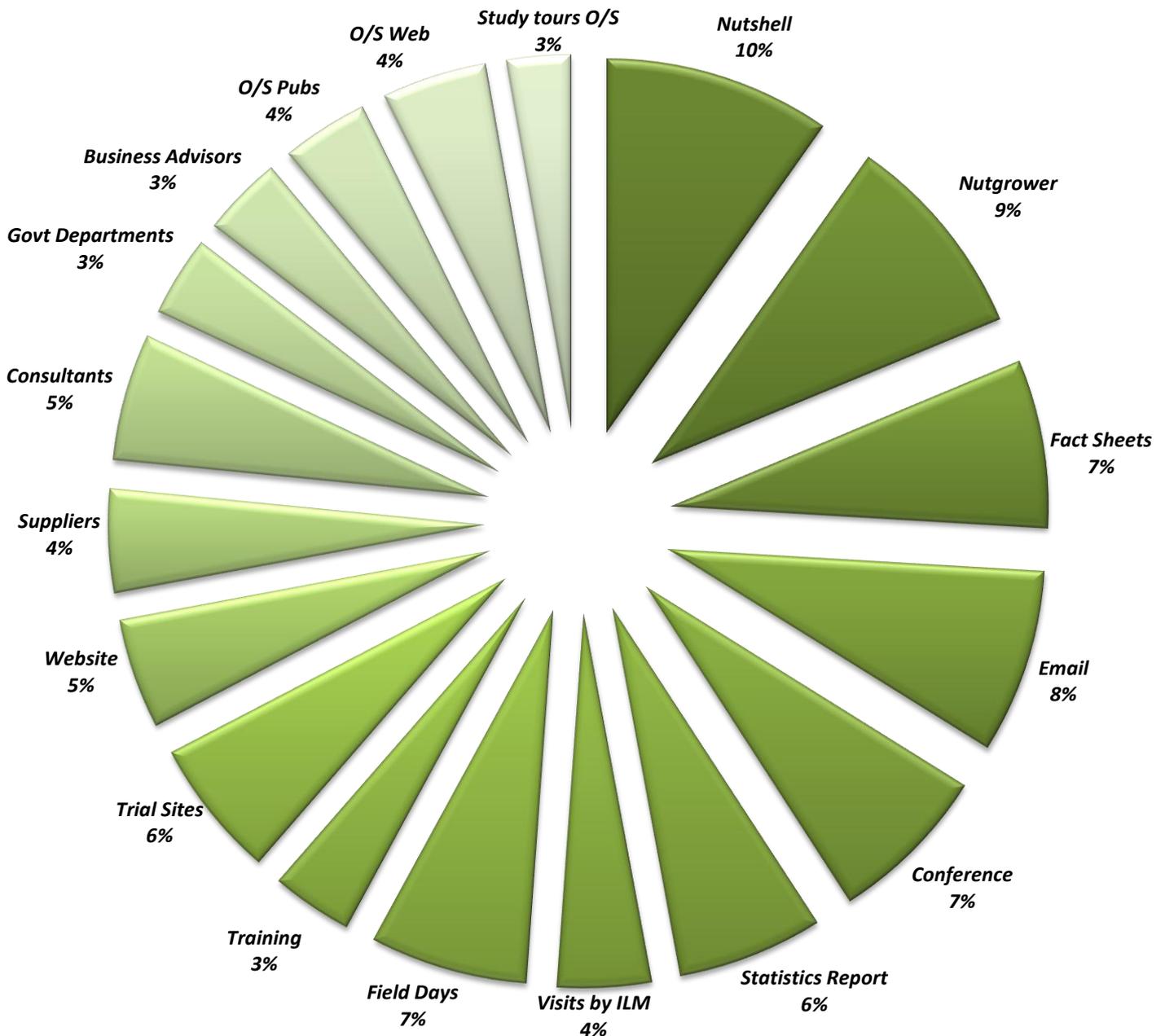
The right information = better business decisions

Evaluation

Survey responses: 41

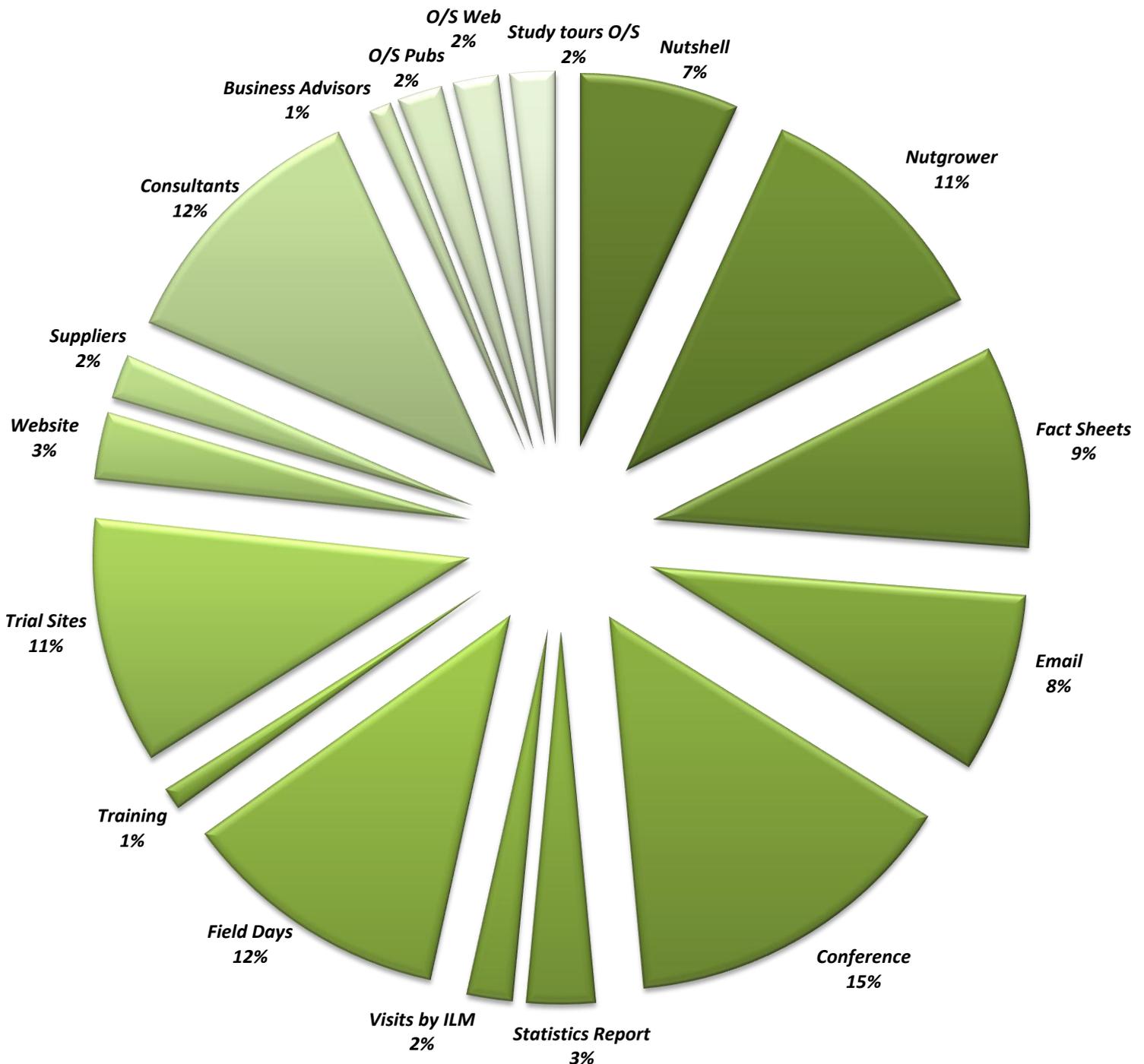
The most widely used publications provided to members and contacts of the ABA were noted as the 'In a Nutshell' newsletter, 'Australian Nutgrower' magazine, Almond Industry Conference, Almond Production Fact Sheets and Almond Grower Field Days held by the ABA. All publications supplied are used by most respondents, with the spread of use being very close between all listed.

Information Source - Publications Currently Used



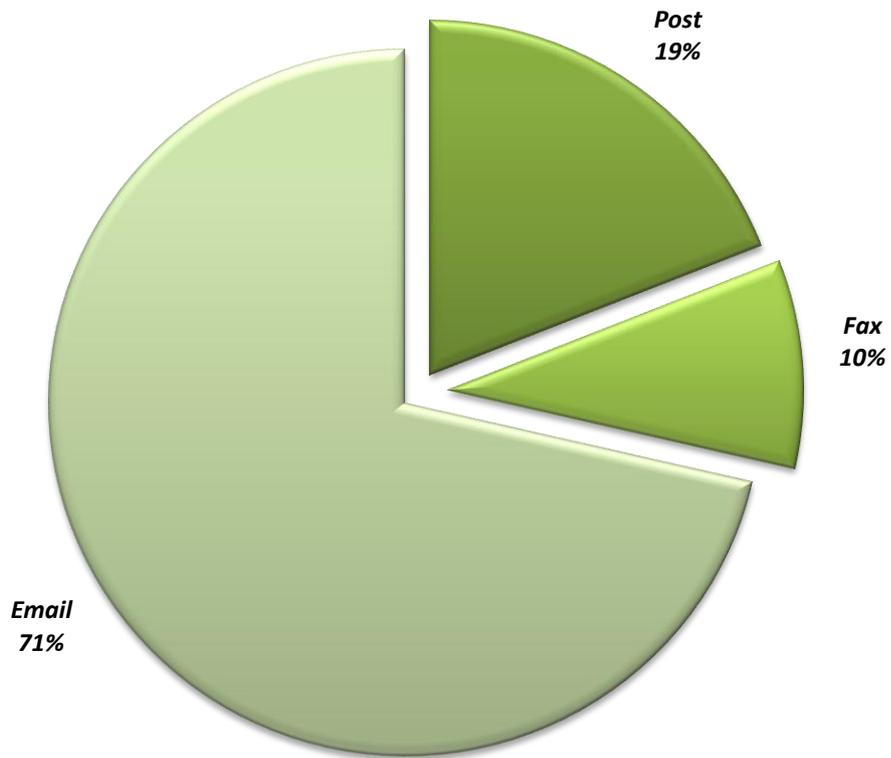
The three most valuable information sources according to survey respondents were the Almond Industry Conference (15%) followed by Almond grower field days (12%) and Consultants (12%). Other highly valuable information sources included the 'Australian Nutgrower' magazine (11%) and demonstration trial sites (11%).

Information Source - Most Valuable



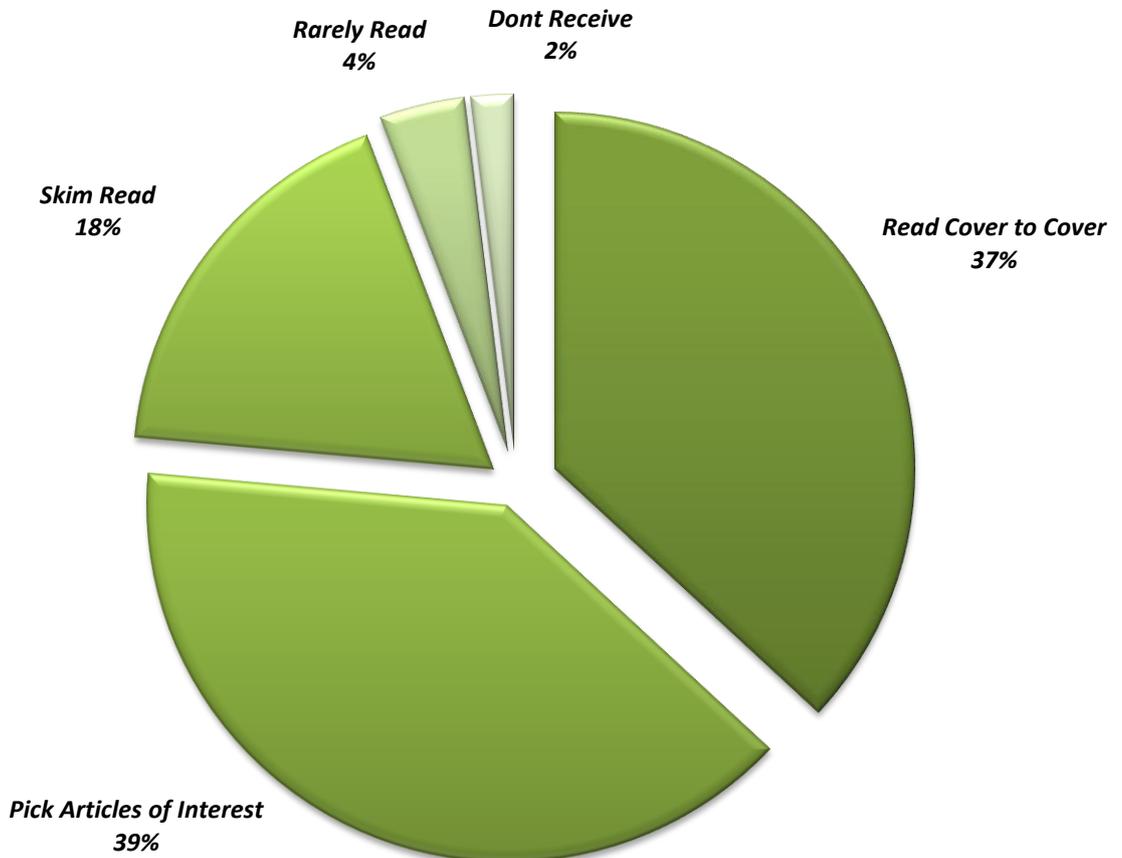
71% of survey respondents noted that the best way to send information to them is by email, followed by 19% by post and 10% by fax.

Best way to send Publications & Information



Publications supplied to members and contacts are widely read, with 76% of people reading 'In A Nutshell', 'Australian Nutgrower', Almond production Fact Sheets and the ABA 'Annual Statistics Report' cover to cover, or articles of special interest.

Publication Usage



Suggestions for future publications

Respondents noted a range of options for new publications or more information they would like to see provided by the ABA including:

- Members list
- Almond grower list
- Progress report on GF677 performance results
- Average seasonal crack-out % - Age
- Water use
- Nutrition requirements
- Results/findings from industry programs
- Continuing time series of nut size distribution from each harvest
- Case studies of best practice – new technology or management systems
- How to manage high salinity in soils with poor quality water
- Best performing mini sprinklers
- Pollination service providers
- Harvesting service providers
- Short courses – correspondence
- Nursery suppliers
- Improved links with overseas research & websites
- Chemical registrations – updates on what and when new or existing chemicals become available
- Relevant markers for nutrient levels in leaf and soil
- Information on best practice without pulse/when pulse not available
- Occasional field help
- Clearer chemical availability – permits and use (don't always line up)
- Global commodity and farm import reports

Comments

'Out of all industries I am in, the ABA kept me up to date very well, more importantly the water updates by email – Thanking you'



ABA Member Survey

The Almond Board of Australia (ABA) is keen to ensure we are delivering what you need, in the best way.

So please take a few minutes to complete this short survey. Your input will be combined with many others to provide a clear picture of our members' needs, and our overall performance and areas for improvement. From that we'll develop a plan to ensure we're doing the best possible job to support your needs.

How long have you had personal dealings with the ABA?

<i>Less than 6 months</i>	<i>6 months - 1 year</i>	<i>1 year - 3 years</i>	<i>3 years - 5 years</i>	<i>Greater than 5 years</i>

How would you rate your knowledge of the ABA?

<i>Very poor</i>	<i>Poor</i>	<i>Average</i>	<i>Good</i>	<i>Excellent</i>

In your view, how important is the ABA?

<i>Very unimportant</i>	<i>Unimportant</i>	<i>Can't Say</i>	<i>Important</i>	<i>Very Important</i>

How would you describe your relationship with the ABA?

<i>Very poor</i>	<i>Poor</i>	<i>Average</i>	<i>Good</i>	<i>Excellent</i>

How would you rate the ABA on it's overall performance?

<i>Very poor</i>	<i>Poor</i>	<i>Average</i>	<i>Good</i>	<i>Excellent</i>

What is the ABA doing particularly well?

What additional issues should the ABA be addressing?

How regularly should the ABA communicate on it's initiatives and activities?

<i>Weekly</i>	<i>Fortnightly</i>	<i>Monthly</i>	<i>Quarterly</i>	<i>Annually</i>	<i>As needed</i>

How can the ABA improve it's general communication with you?

How could the ABA better serve your needs?

How important are each of the following in your dealings with the ABA?

	<i>Very unimportant</i>	<i>Unimportant</i>	<i>Can't Say</i>	<i>Important</i>	<i>Very Important</i>
<i>Website</i>					
<i>Newsletter (electronic)</i>					
<i>Newsletter (hard copy)</i>					
<i>Email Communication</i>					
<i>Media Releases</i>					
<i>Printed materials/Information Reports</i>					
<i>Field Days & Workshops</i>					
<i>Face-to-face Meetings</i>					
<i>Individual Property Visits</i>					
<i>Regional Meetings</i>					
<i>Annual Conferences</i>					
<i>Marketing Forums</i>					

Your Name: _____
(optional)

Company: _____
(optional)

Please complete by Friday, April 30th, 2010 by return email post or fax.

Thank you for your participation in this survey.

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Almond Board of Australia

Evaluation Survey 2010

During April 2010 The Almond Board of Australia conducted an evaluation of the services it provides to members. This evaluation covered areas including the effectiveness and importance of publications, conferences, field days and information distribution as well as gauging how well our members know what we do and our importance to them.

This survey was sent as an interactive PDF to Almond Board of Australia members, and split into each membership category. In total 44 responses were collected from a possible 168, a 26% response rate. The categories were defined as: Grower A (equal to or less than 500 ha of plantings), Grower B (more than 500 ha of plantings) and Associate Members (Other persons with an interest in the Australian almond industry).

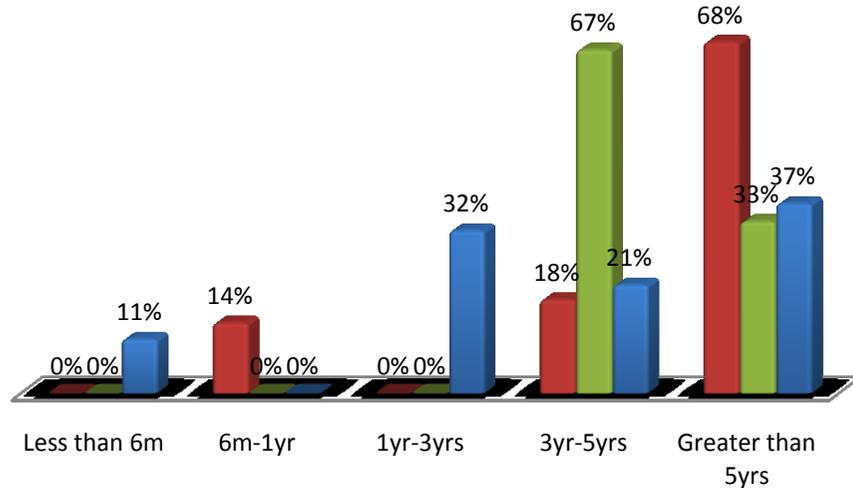
Grower A

Grower B

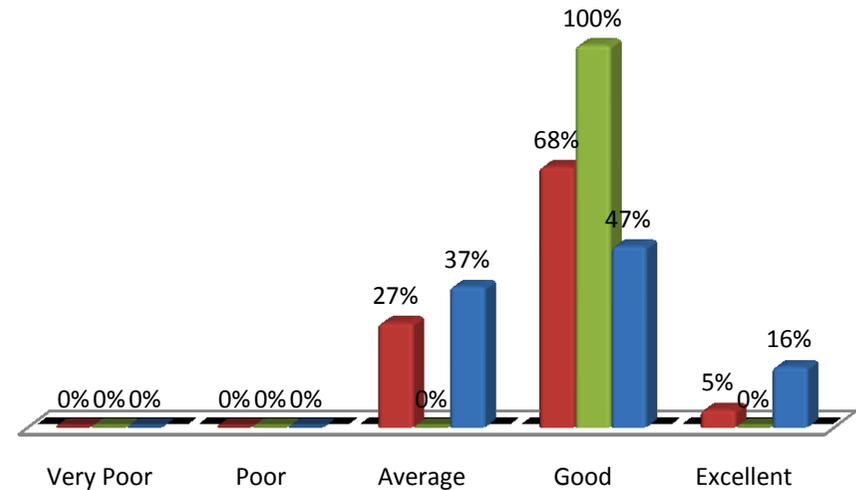
Associate

Almond Board of Australia – Performance & Knowledge

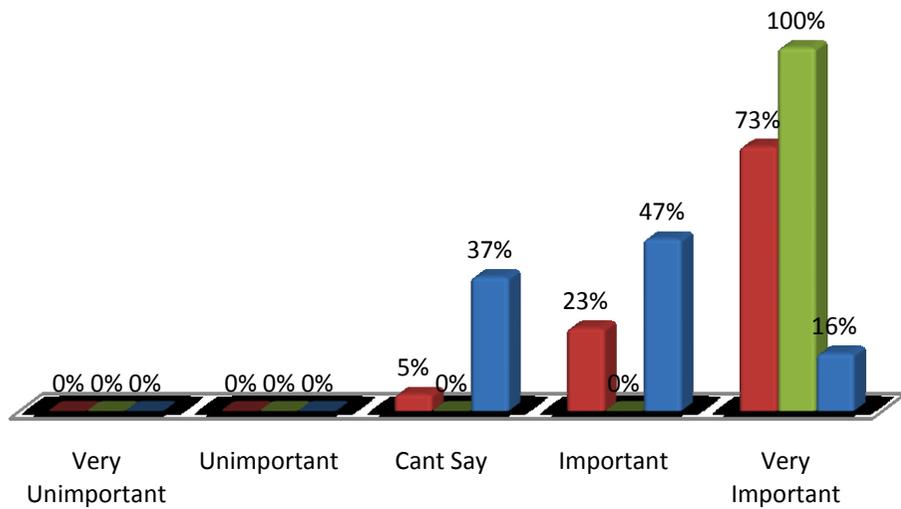
How long have you had personal dealings with the ABA?



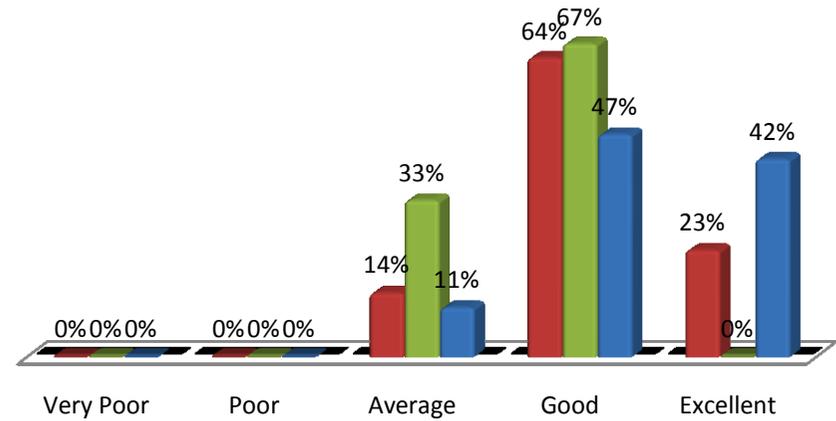
How would you rate your knowledge of the ABA?



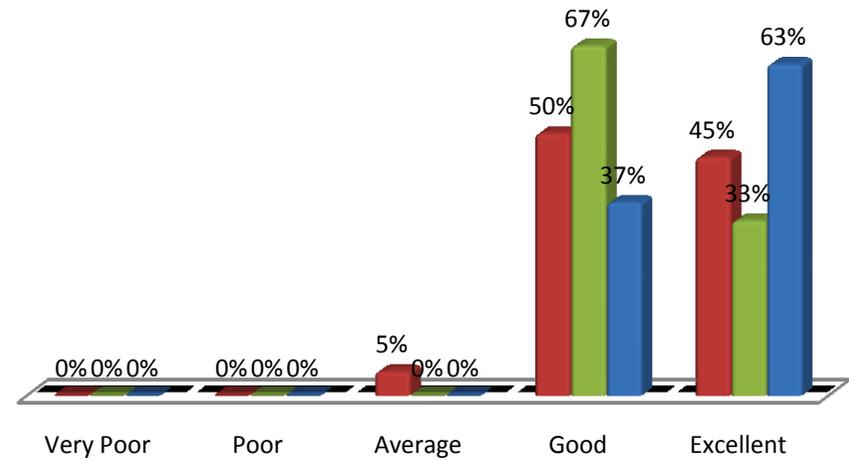
In your veiw, how important is the ABA?



How would you describe your relationship with the ABA?

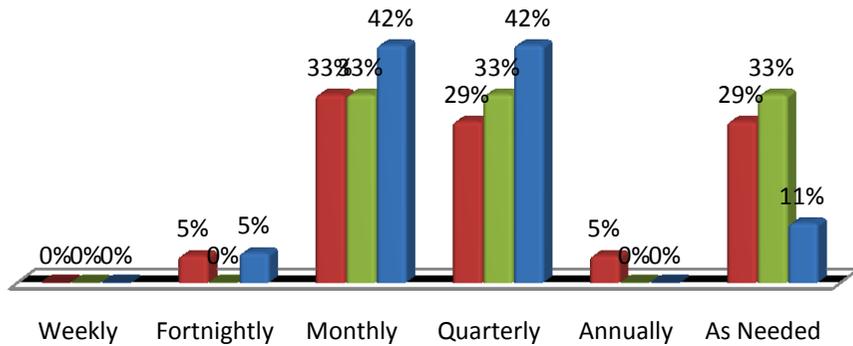


How would you rate the ABA on it's overall performance?

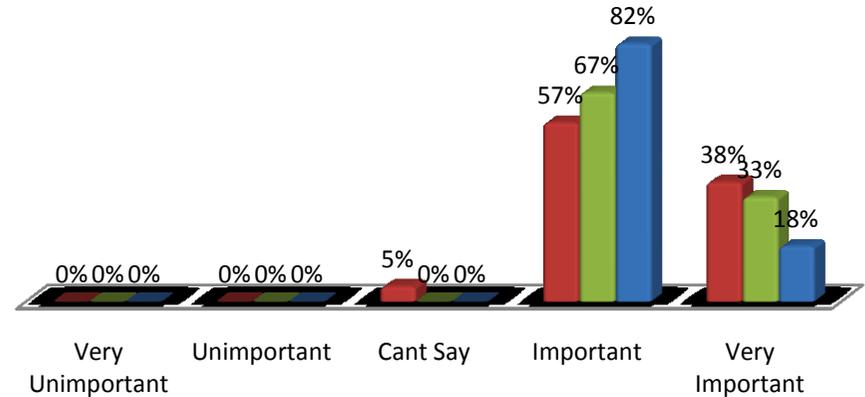


Almond Board of Australia – Communications & Events

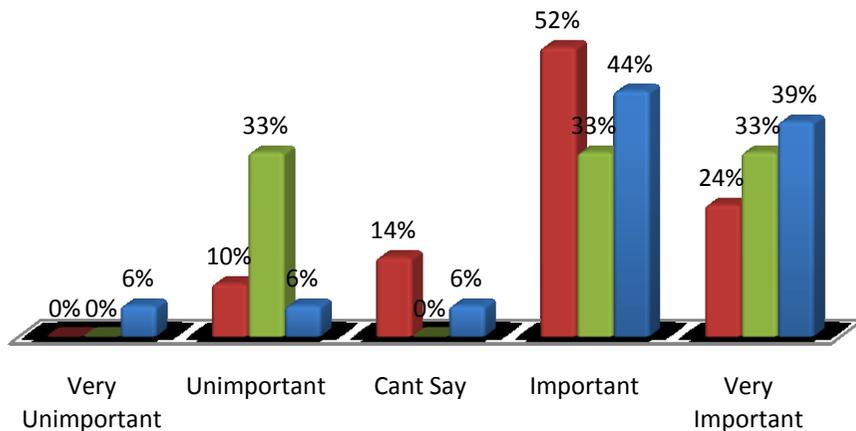
How regularly should the ABA communicate on it's initiatives and activities?



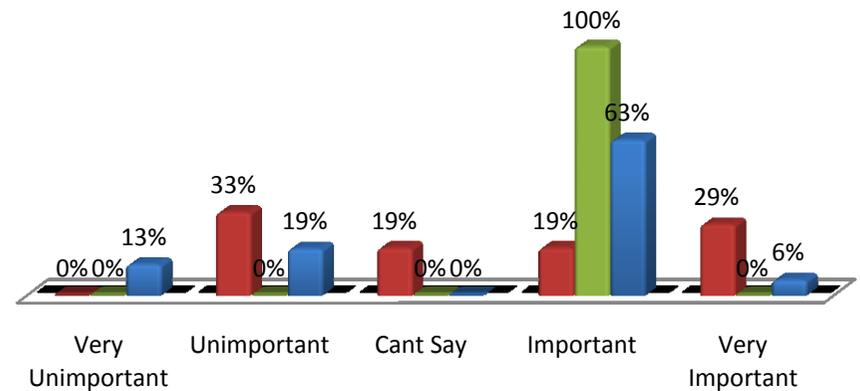
How important is the electronic newsletter to you?



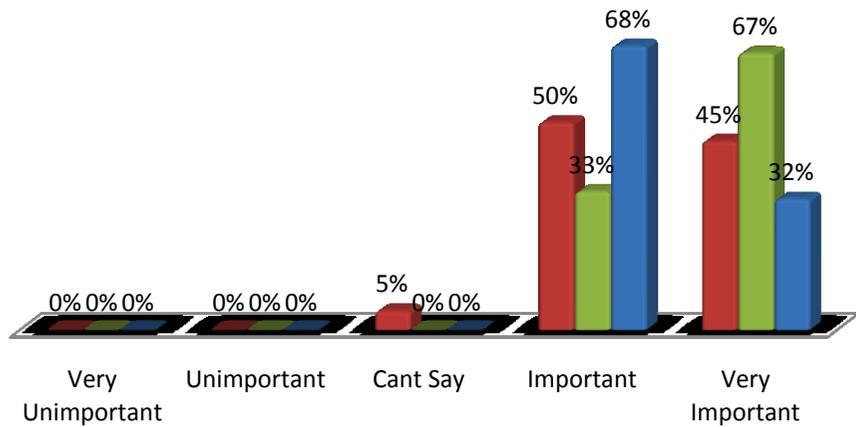
How important is the website to you?



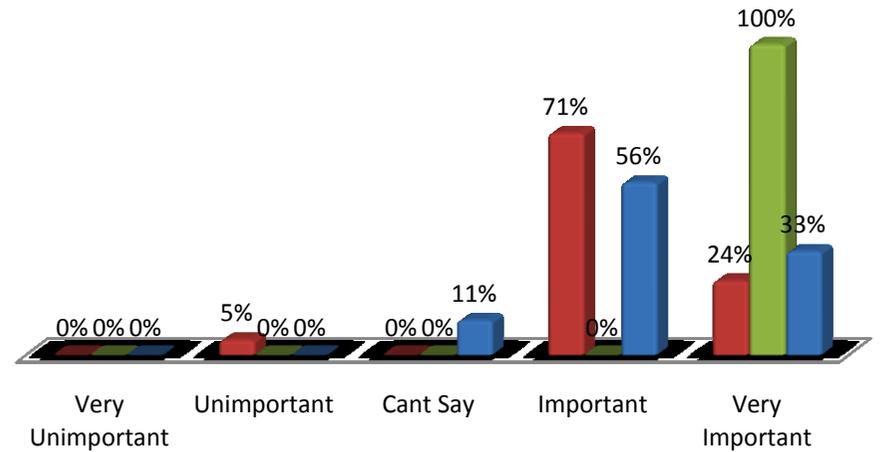
How important is the hard copy newsletter to you?



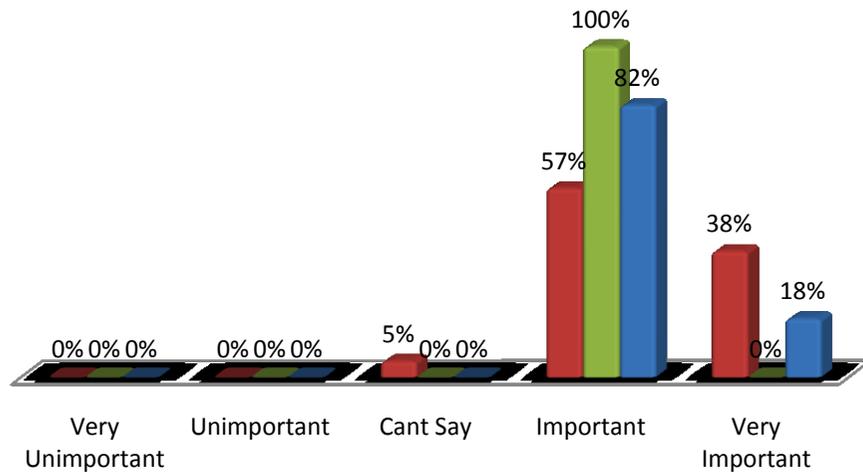
How important are other email communications to you?



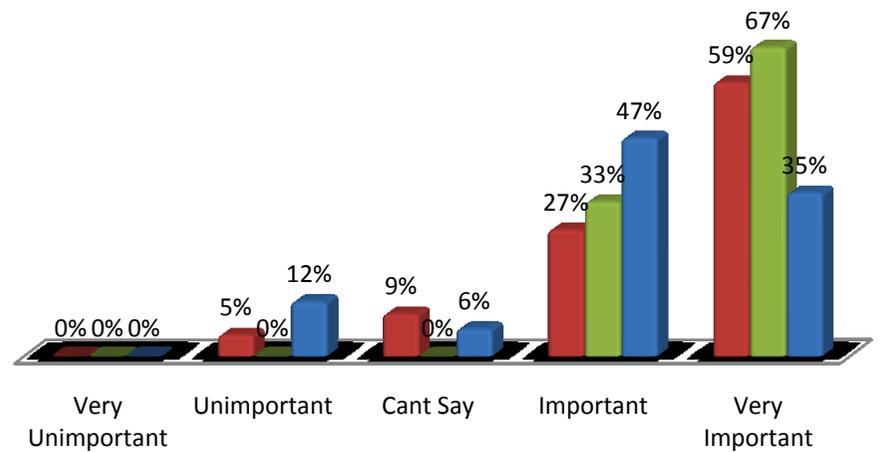
How important are other printed reports to you?



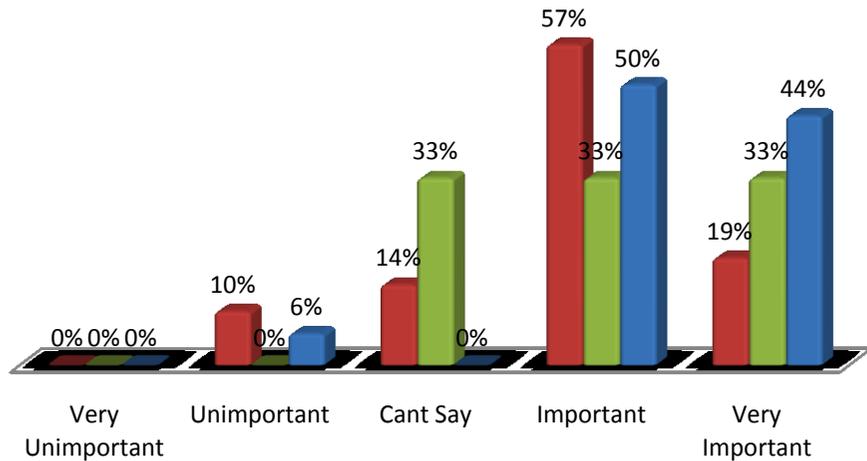
How important are Media Releases to you?



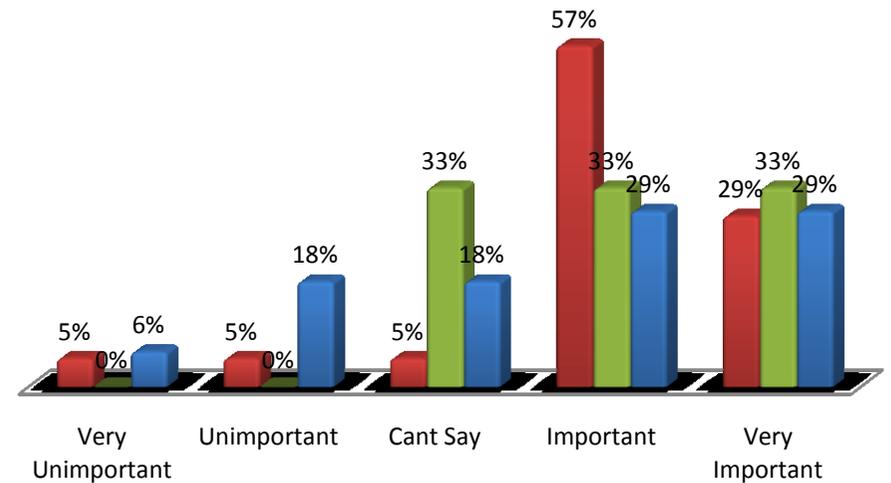
How important are grower field days & workshops to you?



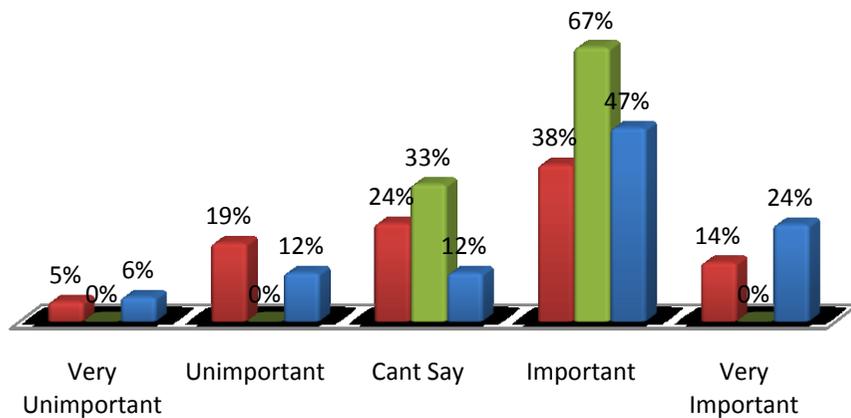
How important are face to face meetings to you?



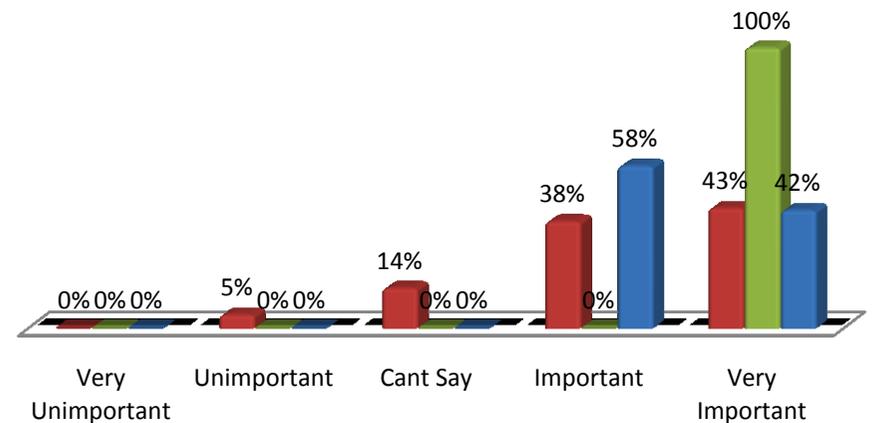
How important are regional grower meetings to you?



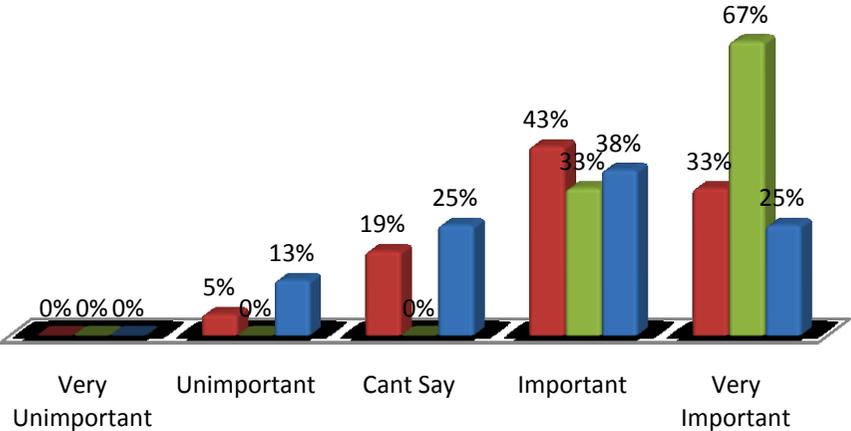
How important are individual property visits to you?



How important is the Annual Industry Conference to you?

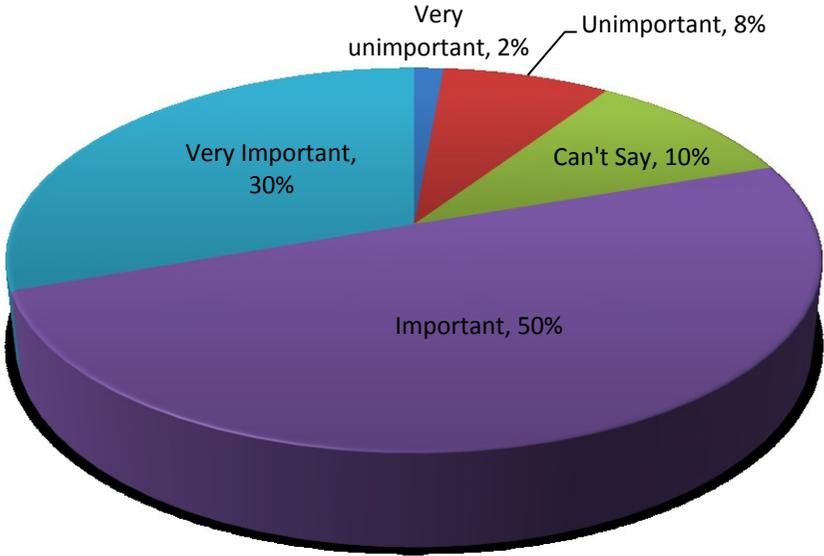


How important is the Annual Industry Marketing Forum to you?



This evaluation indicated that 80% of survey respondents rate overall communications as either important or very important.

Total Ratings over all categories



Almond Board of Australia – Evaluation Comments

What is the ABA doing particularly well?	What additional issues should the ABA be addressing?	How can the ABA improve its general communication with you?	How could the ABA better serve your needs?
Trial work on optimum production and the communication of results. Informing growers of current issues relative to Almond industry eg water situation, latest technology releases, changes to chemical regulations, new pests and diseases, marketplace information, legislation changes etc. Willingness to help individuals with their problems	The sustainability of the smaller growers (ie less than 200 Ha) in the light of current economic climate and water issues. Continue hard with current programmes to improve our image in the market place both locally and overseas.	Communication is already very good directly from ABA, but maybe more contact is needed between our area representatives and local growers.	Generally doing a good job to meet our needs.
Communication, annual convention extremely well. R&D management, marketing and giving the industry a profile in the public	Difficult question. Employee new awards could become a problem, but not always handled nationally which makes it difficult for a body like ABA to handle	I think it's pretty darn good already	Lower the AUS/US dollar ratio
Your newsletter is very good. Putting Australia on the world map as far being a quality almond producer.	Helping in getting Australian Almond industry's cost of doing business in line with world competitors in the areas of almond equipment, fertilizers and chemicals and processing cost.	No improvement needed	Doing spreadsheets to see what areas on a per hectare basis we are competitive and where we aren't. I think that if growers and processors knew that information it would at least start the dialogue to find solutions. Also it might open up business opportunities for new or existing local suppliers and lower grower cost.
CT Trial research & feedback. Pest & Disease handbook. Chemical permit registration.	Water?	I should be the one who communicates more	We are new members to the Almond industry and yet to pick a crop. We will assess as it becomes more relevant to us.
Liaising and leading with other industries in areas of joint interest whether on policies, politics or cross industry matters. Makes our clout and value go further than we could on our own.	I like the initiative to research the Indian market further – we have a lot in common and they are getting wealthier. The new IR laws have set us backwards 30 years – they are far more costly than we ever suspected – have destroyed good staff and employer relationships – reduce the flexibility of both parties – and will require management to reduce labour costs and enable us to compete with o/s producers. A really bad outcome for employers who took pride in having good staff morale and conditions!	I get more than I can read now!	Not sure
Keeping members informed via Conferences, Marketing Forums, field days, newsletters etc	Increase focus on domestic market almond consumption. Continued support for 'Nuts for Life' and active participation in ANIC	Happy with current level of communication.	Ensure that an Industry spokesperson is capable of handling severe media scrutiny in the event of some public interest event such as salmonella outbreak etc. To continue to be proactive in pushing the almond story to the Australian public.
Staying together as an industry	Address regional issues. Develop industry wide spray program. Better utilise technical resources in producing states. Better structured technical program. Foresight in addressing emergency issues.	More emails	At the moment no better

Keeping in contact. Addressing industry issues on a national basis with presentation to government on issues on water, R&D and market access	Maybe develop a program similar to the GrowData program that is specific to almonds to help with budgeting, spray diaries, HACCAP, programming and producing P&L's	Via the internet is working well	Lobby government for tariff reinstatement
Industry promotion to the media and general public.	The future of our Australian industry during a period of high world supply. How would we compete with potential low cost producers? What strategies could we put in place now to enable us to remain viable as an industry should the \$AUD remain high and countries that currently grow large volumes of stone fruit like Argentina and Chile decide to grow large volumes of almonds. We need to define our production and marketing advantages now while we are experiencing a period when the industry is not under catastrophic pressure like the Australian grape industry. It may be that some R&D projects to limit use of labour (for example more gps controlled automation in orchards), or industry wide input purchases or exploration of non typical almond markets (eg not have too many eggs in the India basket) would be beneficial.	Email and grower days at key times are good.	SWOT analysis type results for the industry are interesting as a grower. Lets you know the things being considered by the ABA - it can instill confidence that all the issues are being covered. Also triggers grower thought re challenges or opportunities in the industry that they may not have considered.
Always addressing and keeping ahead of the many issues confronting almond growers ad their industry.	Permits or registration of additional miticides. Technical trials, guest speakers, looking at sustainability issues and carbon footprint and long term soil health issues.	More technical field days	More technical field days
Production and export statistics. Annual conferences and reporting. Organisation of conference bringing together producers, processors and marketers.	Continue R&D on production issues such as mite control, salinity control measures and disease control	Fine as it is	Fine as it is
Field days. Promotion. Annual Seminar, technical communications. Research & development.		Impressed with the delivery of information at this stage	Happy with the role of the board at this stage