

# Almond

## STRATEGIC INVESTMENT PLAN 2017-2021 AT A GLANCE

### POTENTIAL IMPACT OF THIS PLAN



Based on an estimated investment of \$14.53 million over the next five years.

### Major opportunities

- Additional growth in Australian almond sales to Asia
- Further research and promotion of the health benefits of consuming almonds – almonds are an excellent source of protein, vitamin E, dietary fibre and mono-saturated fat
- Additional strategic links with the Californian and Spanish industries to shortcut technology evaluation and share almond production, processing and marketing knowledge.

### Major challenges

- Increased production may threaten current profitable almond prices
- Volatile Australian dollar making Australian product expensive relative to that sourced from California
- Newly emerged pest and disease problem that has resulted in a major increase in serious defects in harvested almonds
- A heavy reliance on honey bee for pollination
- Significant user of irrigation water – 600 gigalitres per annum forecast by the time this plan has been fully implemented (ABA 2016).

OUTCOMES	STRATEGIES
Pest and disease damage to almonds has been reduced through enhanced integrated pest management (IPM) and integrated pest disease management (IDM)	Reduce damage caused by pests by further enhancing the industry's IPM with a key R&D focus on Carpophilus Beetle, Carob Moth, emerging stored almond pests and orchard floor hygiene
	Reduce damage caused by diseases by further enhancing the industry's IDM, transferring knowledge from other industries and a key focus on Hull Rot
	Ensure IPM and IDM are adopted by growers that account for 90 per cent of almond volume
	Maintain industry's biosecurity preparedness
A major productivity gain in almond pollination by 2022 through a 25 per cent reduction in bee stocking rates with no loss in pollination efficiency (nut set)	Develop and maintain a robust honey bee pest and disease incursion response including efforts to keep Australia free of <i>Varroa destructor</i> and similar exotic honey bee pests
	Improve the productivity of honey bees as pollinators and the efficiency of almond pollination
	Develop pollination capacity in the honey bee industry

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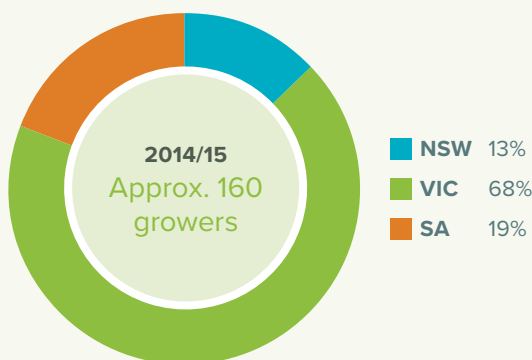
## STRATEGIC INVESTMENT PLAN

### 2017-2021 AT A GLANCE

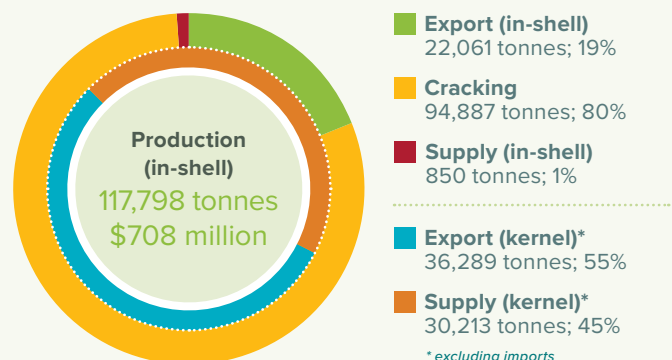
OUTCOMES	STRATEGIES
An almond industry crop production system that supports further efficiencies in Horizon 1 orchards and the development of Horizon 3 orchards and has lifted average industry yield from 3 to 4 tonnes per hectare. This will include new almond varieties featuring self-fertility and sealed shells, a new nursery accreditation scheme, 4 megalitres of irrigation water per tonne of almond kernel yield and proven 'shake and catch' harvesting and postharvest systems	Undertake an evaluation of varieties originating from the almond breeding program, direct import and older varieties from California. Evaluate rootstocks under Australian conditions
	Maintain disease free and diverse genetic material
	Develop a standard for trees sold by nurseries
	Ensure the nursery industry is accredited to supply quality trees consistent with the standard
	Continue to improve the on-farm efficiency of almond industry water use
	Understand the almond industry's future in relation to irrigation demand 'big picture'
	Deliver improved soil health to Australian almond orchards
	Support further efficiencies in Horizon 1 orchards and the development of Horizon 3 orchards to better understand how the combination of soil health, nutrition, tree architecture, plant physiology and orchard design is integrated
	Develop improved harvesting techniques
Develop improved postharvest handling techniques	
Leverage R&D investment in other pools and programs to deliver novel technology relevant to the almond industry	

OUTCOMES	STRATEGIES
An informed industry that adopts R&D outcomes and has the capacity to support current and future industry needs	Support adoption of R&D outcomes by effective extension
	Deliver meaningful data on production, planting, environmental performance, international supply and demand in a timely manner
	Ensure industry stakeholders remain engaged through an effective communications program
	Enhance skills and capacity to support current and future industry needs
Increased domestic consumption from 16,000 tonnes in 2016 to 27,500 tonnes in 2022. Increased export sales from 64,000 tonnes in 2016 to 110,000 tonnes in 2022. European Union inspections reduced from one in twenty containers to one in one hundred containers at destination by 2022	Engage with the international nut industry to maximise R&D and marketing innovation
	Invest in domestic and export market development
	Market research and insights to help industry increase domestic almond consumption
	Facilitate Australian almond exports through market research and improved market access
	Further enhance Australia's reputation for safe, high quality almonds

#### Industry size and production distribution



#### Almond supply chain and value 2014/15



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