Marketing Australian Almonds
15 years strong…

Joseph Ebbage
Almond Board of Australia
Australian Almonds Production Growth from 2003 to 2018

From 7,017 tonnes to 80,000 tonnes
Australian Almonds Sales Growth from 2007 to 2017

Domestic Sales: 11,334 T to 26,166 T

Export Sales: 12,614 T to 54,343 T
Top 5 Markets for Australian Almonds in 2017
Growing Domestic Demand

From 540 grams per person in 2007 to over 1 kilogram per person in 2017

In 2017 the average Australian almond consumption was 1.09Kg per person

This is one of the highest per capita consumption rates in the world and still growing.
Growing Domestic Demand

Popularity of almonds due to their versatility

### FORMS OF AUSTRALIAN ALMONDS

- Kernel
- Whole blanched
- Natural sliced
- Blanched sliced
- Slivered
- Diced
- Meal
Almonds are the most frequent nut ingredient in new products in Australia

<table>
<thead>
<tr>
<th>Australia Innova: July 2017 to June 2018</th>
<th>2018</th>
<th>2017</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almonds</td>
<td>272</td>
<td>317</td>
<td>76</td>
</tr>
<tr>
<td>Cashews</td>
<td>120</td>
<td>152</td>
<td>40</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>74</td>
<td>94</td>
<td>44</td>
</tr>
<tr>
<td>Walnuts</td>
<td>41</td>
<td>51</td>
<td>12</td>
</tr>
<tr>
<td>Macadamia</td>
<td>36</td>
<td>54</td>
<td>17</td>
</tr>
<tr>
<td>Pistachio</td>
<td>15</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>Peanuts</td>
<td>165</td>
<td>238</td>
<td>65</td>
</tr>
</tbody>
</table>
Almond snacking driven by ‘health & nutrition’

Breakfast

Lunch

At Work

Sport
Almonds promoted to health professionals

Heart Health

Healthy Almonds

Heart

Healthy Weight

Diabetes
Almonds recommended by sports nutrition experts

NEED TO REPLENISH?

AUSTRALIAN ALMONDS ARE HIGH IN:
✓ Protein
✓ Vitamin E
✓ Healthy Fats

LOVE THE CRUNCH

facebook.com/AustralianAlmonds
‘Call to action’ with football themed and heart shaped snack tins
Growing our social media communication: Facebook, Instagram and Twitter
Almonds recommended by Australian football stars
Growing consumer reach and engagement

Television

10 May 2018
Channel 9 Adelaide, 6pm News
Growing consumer reach and engagement

Online

Steal The Habits Behind This AFLW Player’s Amazing Transformation
She lost 30kg in her quest to get fit - by Lizza Goldingham

24th May 2018

Women’s Health
Growing consumer reach and engagement

Radio

25 May 2018
Triple M Melbourne
Growing consumer reach and engagement

COVERAGE HIGHLIGHTS

SOCIAL MEDIA

7 June 2018
Followers: 78k
Handle: healthforhappy
Growing consumer reach and engagement
Australian Almonds Export Market Development Program

Funding Support for Almond Board of Australia Export Development Programs:

Export Market Development Grants (EMDG)

Australian Government
Australian Trade and Investment Commission

Horticulture Innovation Australia
### Markets: 2017-18

<table>
<thead>
<tr>
<th>Markets</th>
<th>Tonnes</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Exports</strong></td>
<td>54343</td>
<td></td>
</tr>
<tr>
<td>India &amp; Middle East and Africa</td>
<td>22886</td>
<td>42%</td>
</tr>
<tr>
<td>Europe</td>
<td>19099</td>
<td>35%</td>
</tr>
<tr>
<td><strong>Established Markets</strong></td>
<td>41985</td>
<td>77%</td>
</tr>
<tr>
<td>North-East Asia</td>
<td>1529</td>
<td></td>
</tr>
<tr>
<td>South-East Asia (incl Vietnam)</td>
<td>5675</td>
<td></td>
</tr>
<tr>
<td>Australasia-Oceania</td>
<td>2086</td>
<td></td>
</tr>
<tr>
<td><strong>Emerging Markets</strong></td>
<td>9290</td>
<td>17%</td>
</tr>
</tbody>
</table>
Established Market and Emerging Markets

Europe: Anuga, Cologne & Sial, Paris

China: China Tree Nut Conference & Sial China

India and Middle East/Africa

Japan: Foodex Tokyo

Indonesia: Food & Hotel Indonesia
Australian Almonds Trade Events
Leveraging our Australian Free Trade Agreements

- Korea 8% Tariff Now 0%
- Japan 2.4% Tariff Now 0%
- China 10% Tariff Now 2%. US increased to 50%
- UK FTA talks are underway.
- EU FTA talks are underway.
- India/Aust FTA has stalled. US increases proposed
Our new website: www.industry.australianalmonds.com.au
Growing our Indian Market at Gulfoods
Aussies win something in cricket!
Thank You