

Final Report

Almond market access and trade development 2023-2026

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Almond market access and trade development 2023-2026 (AL22004)

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Public summary

Production & Harvest Overview

Over the past three seasons, Australian almond production grew amid variable seasonal conditions. The 2023 season marked by floods and high rainfall saw production take an unprecedented dip before bouncing back in 2024 and 2025 to the two biggest crops ever produced.

Global Market Dynamics

Globally, the almond market has begun to show encouraging signs of recovery the 2023–2025 period. While low global prices persisted through 2023 and into 2024 due to high supply from California, 2025 saw pricing recover. Reductions in the Californian bearing acreage, along with lower yields, played a significant part in restoring some balance in the supply-demand market dynamic.

Australian Export Performance

Free trade agreements in China, Thailand and India played a huge part in Australia's export performance across all three years. In 2023, export volumes recovered strongly following earlier supply chain disruptions, restoring momentum across key Asian markets. This strength carried into 2024, when export sales reached record levels, driven by exceptional inshell demand into India and continued kernel growth into China. In 2025, export momentum has remained strong, with new-season sales after six months tracking 2% ahead of the prior year's record pace. Demand from China and India has led the buying activity while Turkiye continues to emerge as a favoured destination for Australian almonds.

Collectively, these trends reinforce Australia's reputation as a preferred supplier of premium almonds across global markets.

Australian Domestic Performance

The domestic almond market remains one of the industry's key markets. In 2023, domestic sales stabilised as retail and foodservice demand normalised after Covid. This momentum accelerated in 2024, with volumes rebounding to pre-COVID levels, supported by growing consumer interest in health, nutrition and plant-based foods. Activity to support the versatility and health benefits of consuming almonds continued to be a key focus for the market development program in 2025.

Global Almond Market Trends

Over the past three years, the global almond market has navigated a period of recalibration, shaped by shifting supply dynamics, evolving trade flows and changing consumption patterns across key markets. From 2023 to 2025, the category demonstrated resilience, maintaining steady growth despite short-term pricing pressures and broader global economic uncertainty.

Importantly, inventory and receipt data over the period increasingly pointed to lower-than-anticipated supply, reinforcing the sense that global production is entering a more balanced phase after years of expansion.

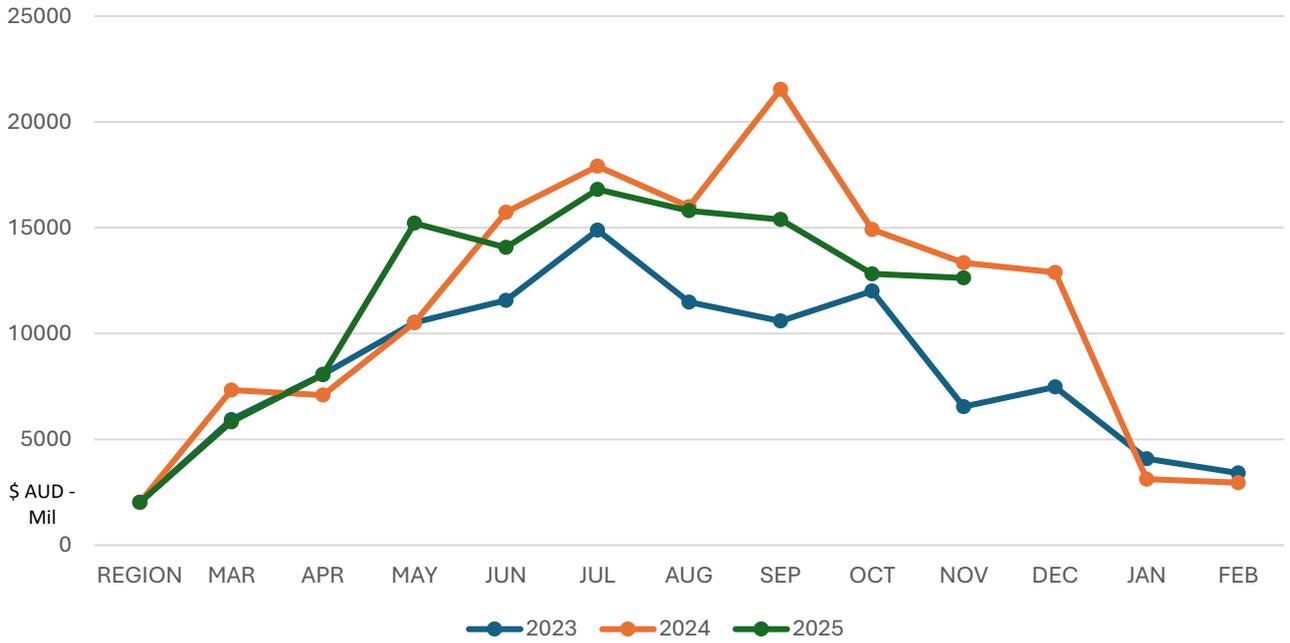
Trade patterns across the three years reflected a gradual diversification of global demand, but in 2025 Australian almonds became a safe haven as the geo-political and trade uncertainties created opportunities for Australian almond marketers. The outlook is for global pricing levels to remain steady for the foreseeable future as the production outlook looks stable amid a contraction in new plantings in the key growing areas of California, Australia and Spain.

During the life of the project Australian almond exports increased by 36%.

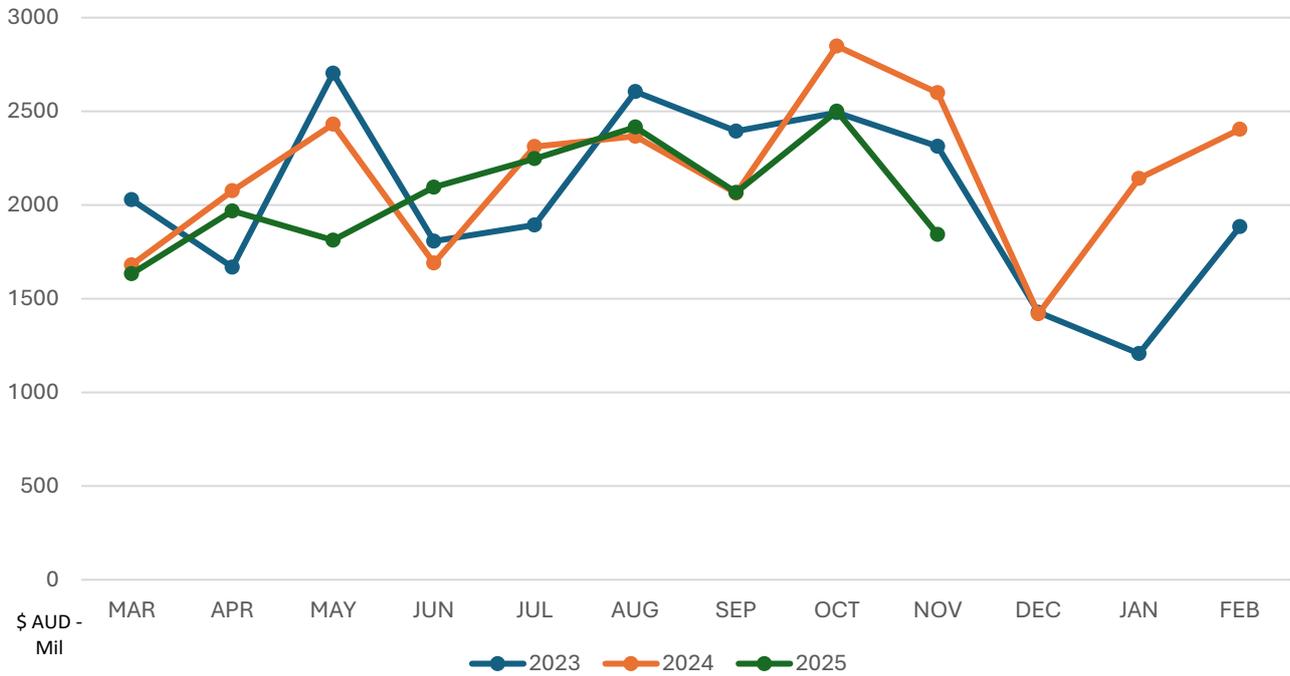
Key drivers in the extra demand were the favourable trade conditions in place in China, India and Turkiye. While overall exports grew, the Chinese exports proportion of total exports also increased from 50% to 61% by the end of the 2025 calendar year. The pricing advantage compared to the heavily taxed Californian product was the major factor behind the extra volumes being diverted into the market. Indian exports also more than doubled during this time as the AIECTA tariff reduction resulted in renewed interest in both kernels and inshell. Turkiye also became the third largest buyer off-shore, almost doubling intake over the three years.

Exports represent 81% of total sales in the first year of the project and by the end of 2025 had grown to 86% as the available volume increased.

AUSTRALIAN ALMONDS EXPORT SALES



AUSTRALIAN ALMONDS DOMESTIC SALES



Introduction

This project was undertaken to support the Australian almond industry through a pivotal three-year period marked by global market volatility, evolving trade conditions and increasing competition from both established and emerging almond-producing regions. Delivered through Hort Innovation funding (AL22004) and aligned to the Australian almond industry's Market Development Strategy, the project focused on protecting market access, sustaining demand and strengthening Australia's position as a premium, reliable origin in key domestic and international markets.

Australian almond exports grew from 86,584 tonnes per season to 143,512 tonnes per season by the end of the project, an increase of 40%.

The rationale for the project was grounded in the industry's transition from a phase of rapid production expansion to one requiring greater market maturity, resilience and diversification. With global supply increasing and pricing pressure intensifying, Australian growers and exporters required coordinated, evidence-based market development activity to reduce risk, maintain value and support long-term sustainability. This included proactive engagement on tariffs and regulatory settings, targeted trade and consumer engagement, and investment in research, education and market intelligence.

Over the 2023–2025 period, the project played a critical role in supporting export continuity, rebuilding domestic consumption following COVID-19 disruptions, and reinforcing confidence in Australian almonds across trade, food, health professional and consumer audiences. Its significance lies in the outcomes achieved for industry — strengthening market access resilience, sustaining diversified demand and enhancing industry capability — while establishing a strong foundation for future market development investment on behalf of Australian almond growers.

Methodology

The project was delivered through an integrated market development approach combining market access management, trade engagement, consumer marketing, research and professional education. Activities were implemented across priority markets including China, India, Southeast Asia, the Middle East, Europe and Australia, in line with the Market Development Plan.

Key components of the methodology included:

- Ongoing monitoring and management of market access issues, including tariffs, quotas, regulatory changes and technical requirements such as MRLs and aflatoxin thresholds.
- Delivery of outbound trade missions and participation in major international exhibitions and industry forums to maintain visibility, strengthen relationships and gather market intelligence.
- Coordination of inbound trade missions to Australian growing regions to build firsthand understanding of production systems, quality standards and sustainability credentials.
- Implementation of coordinated trade and consumer communications programs using a funnel-based engagement model (engage, educate, convert, advocate).
- Delivery of Health and Food Professional Education Programs to support evidence-based adoption of almonds across foodservice, manufacturing and health sectors.
- Use of quantitative and qualitative research, including consumer studies, campaign effectiveness tracking and market intelligence, to inform decision-making and optimise investment.

Results and Discussion

The project delivered meaningful results across market access, trade engagement, demand generation and industry

capability. These results reflect the value of a coordinated, multi-market approach implemented during a period of global supply adjustment, pricing pressure and heightened competition.

Market Access and Trade Resilience

The project contributed to improved market access resilience by actively monitoring and responding to regulatory, tariff and technical developments in key export destinations. Australia's tariff advantages in China and India were maintained and leveraged during the project period, while ongoing surveillance of regulatory settings in the EU and Indonesia reduced the risk of trade disruption. Representations were made to the trade in the above destinations to monitor the response to the new trade conditions as well as meetings with government officials in Delhi and via Canberra to emphasise the profound impact the trade agreements were having on sales. The ABA's monthly global sales position reports that tracked the increased sales provided tangible evidence of the impact. Further discussions were also held on enhancing future trade agreement talks and these discussions are ongoing. Engagement with government agencies and international industry bodies improved early visibility of potential changes, allowing industry stakeholders to prepare and respond proactively.

As a result, Australian almond exporters maintained continuity of trade across priority markets during a period of global uncertainty, reinforcing Australia's position as a reliable and trusted supplier.

Trade Engagement and Market Development

Outbound trade missions, exhibitions and international forums generated strong engagement outcomes, supporting both relationship-building and market intelligence gathering. Participation in global events such as the INC Congress, Gulfood, SIAL Shanghai and MEWA India ensured ongoing visibility for Australian almonds and facilitated direct engagement with existing and prospective buyers.

Outbound missions to key markets including Anuga Cologne, China Sial, Gulfood Dubai, Thiafex Bangkok and the International Nut Congress (London, Vancouver and Majorca) were foundational shows that generated hundreds of genuine enquiries for Australian almonds. Other outbound missions to China, Indonesia, Malaysia and Paris were conducted during the project life. Such has been the long-term success of the Australian exports promotional work that a key role in mature markets for the ABA staff is managing potential new customer expectation of supply against volume available. It is a regular occurrence to receive more enquiries than there is almonds available, so the focus has switched to seeking premium positioning and promoting the ingredient potential of almond products to be used in everyday living, rather than rely on a discretionary snack spend. This ongoing strategy is expected to assist with maintaining a strong demand as production increases in the years ahead.

Inbound trade missions to Australian growing regions delivered particularly strong results by providing buyers with firsthand exposure to production practices, quality assurance systems and sustainability credentials. Feedback from participants indicated increased confidence in Australian supply, stronger commercial relationships and improved understanding of Australia's seasonal advantages. In March 2025 more than 30 India traders and purchasing officers toured all the processing facilities of the industry in an event that culminated with the annual Almond Ashes cricket match, that pits Australian sellers against Indian buyers.

These activities contributed to sustained export demand and reduced reliance on individual markets, supporting diversification and long-term resilience.

Demand Generation and Market Positioning

Coordinated trade and consumer communications strengthened awareness of Australian almonds' premium positioning, southern hemisphere seasonality, health benefits and versatility. The use of a funnel-based engagement approach supported progression from awareness to advocacy across trade, food, health professional and consumer audiences.

Domestic demand recovered to pre-COVID levels during the project period, supported by integrated consumer marketing and professional education programs. In international markets, tariff advantages in China, continued uptake in India, Southeast Asia and the Middle East reinforced the value of diversified demand creation.

Industry Capability and Market Intelligence

The project strengthened industry capability through improved access to market intelligence, research and performance reporting. Quantitative and qualitative research informed campaign optimisation and investment decisions, while dashboards and regular reporting enhanced transparency and accountability.

These tools improved industry preparedness, enabling stakeholders to respond more effectively to changing market conditions and positioning the industry to build on the outcomes achieved during the project period.

Overall, the results demonstrate that sustained investment in market access, trade engagement and demand development delivers tangible value for the Australian almond industry. The learnings and relationships established through the project provide a strong foundation for future market development initiatives.

Outputs

Over the three-year period (2023–2025), the project delivered a comprehensive suite of tangible outputs designed to protect market access, strengthen trade relationships, stimulate demand and build industry capability. Outputs were delivered across priority markets in alignment with the Market Development Strategy and were supported by ongoing monitoring, reporting and evaluation.

The outputs reflect a balanced investment across market access management, trade engagement, communications, research and professional education, ensuring activities translated into measurable outcomes for industry stakeholders.

Output	Description	Detail
Market access monitoring and advocacy	Ongoing surveillance and engagement on tariffs, quotas and regulatory requirements affecting Australian almonds	Formal representations, briefings and stakeholder engagement across China, India, EU and Indonesia, including tariffs, TRQs, Halal requirements, MRLs and aflatoxin thresholds
Outbound trade missions and exhibitions	Participation in priority global trade shows, conferences and industry forums	INC Congress (Mallorca), Gulfood, SIAL Shanghai, China Nut Expo, MEWA India, Thaifex and other priority events to maintain visibility and strengthen buyer relationships. 39 outbound missions were completed over the course of the project.
Inbound trade mission	Hosted visits to Australian almond growing regions	Australian Almonds Marketing Seminar with Indian buyers and trade partners which included orchard visits providing firsthand exposure to production systems, quality assurance and sustainability credentials
Trade communications	Coordinated trade communications program across priority markets	Digital trade insights, LinkedIn communications, trade publications, market updates and development of trade databases
Health Professional Education Program	Targeted engagement with health professionals	Evidence-based content, advertorials, ambassador partnerships and education materials distributed through trusted professional channels in India, Malaysia, Indonesia, Thailand, China and Australia with multiple programs conducted each

		year including GP Pack distribution on the health benefits of Australian Almonds
Food Industry Education Program	Engagement with foodservice and manufacturing professionals	Education on versatility, health benefits and product application through content, ambassadors and events across SE Asia – Malaysia, Thailand, Indonesia, Australia and China. We worked with reputable chefs and training schools such as Le Cordon Bleu to educate and train the next generation of food professionals
Market research and intelligence	Quantitative and qualitative research to inform strategy	Consumer research, campaign effectiveness analysis, Nielsen and Innova insights, dashboards and regular reporting

Across the project life, extension and engagement activities were closely integrated with other industry initiatives and aligned to related projects where applicable, ensuring consistency of messaging and efficient use of resources.

Outcomes

AL22004 project delivered clear, measurable outcomes aligned to the Australian almond industry Strategic Investment Plan and relevant Hort Innovation Fund outcomes. These outcomes reflect the project's unique contribution to strengthening market access resilience, sustaining export demand, rebuilding domestic consumption and improving industry capability

The project outcomes sit across four key domains: market access and risk management, trade and market development, demand and consumption growth, and industry capability and intelligence. Collectively, these outcomes supported both intermediate change (knowledge, confidence and preparedness) and end-of-project impact (sustained demand, diversified markets and improved long-term positioning).

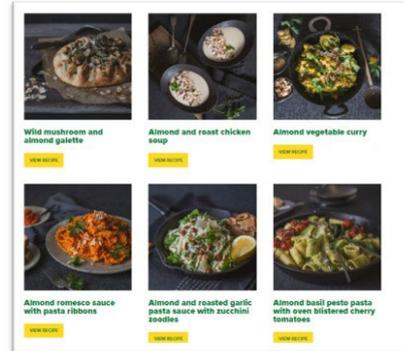
Table: Outcome Summary

Outcome	Alignment to Fund Outcome, Strategy and KPI	Description	Evidence
Strengthened market access resilience	Export competitiveness; market risk management; trade continuity KPIs	Australia's competitive position in key markets was protected and strengthened through sustained tariff advantages, proactive regulatory monitoring and active engagement with government and industry bodies. This reduced disruption risk and supported continuity of trade during periods of global price pressure and regulatory change.	Tariff and regulatory briefings; stakeholder engagement records; export continuity across China, India, EU and Indonesia
Sustained and diversified export demand	Export growth and diversification; market access outcomes	Export performance remained a consistent strength, supported by diversified demand across China, India, Southeast Asia, the Middle East and Europe. Engagement in emerging and secondary markets reduced concentration risk and improved long-term trade resilience.	Export position reports; trade mission outcomes; buyer feedback and sales trends
Improved trade confidence and buyer engagement	Market development and relationship-building KPIs	Trade missions, exhibitions and inbound visits increased buyer confidence in Australian almonds by reinforcing quality, reliability and transparency. First-hand exposure to Australian production systems shortened sales cycles and strengthened long-term relationships.	Mission reports; attendance records; post-visit feedback; repeat engagement
Re-established and growing domestic demand	Domestic consumption and demand stimulation outcomes	Domestic almond consumption recovered to pre-COVID levels and demonstrated early signs of renewed growth, supported by coordinated consumer, trade and professional education programs.	Domestic sales data; campaign performance reporting; retail and foodservice engagement

<p>Increased awareness of health, versatility and premium positioning</p>	<p>Demand creation; knowledge and awareness KPIs</p>	<p>Targeted communications and professional education improved awareness of almonds' health benefits, versatility and premium positioning across trade, foodservice, health professionals and consumers.</p> <p>During this project period we saw sales to South-East Asian countries grow by 40% but then soften in 2024-25 as expectations of a smaller crop and premium pricing in China saw volumes diverted to the Chinese market, which were up 128% on the previous year.</p> <p>The work done through S-E Asia is that there is existing demand for Australian product and larger crops (or changes to the geo-political landscape) could result in another significant increase into this market.</p> <p>The early stages of the project involved preparation of resources and devising a targeted program to roll out our educational health and food professionals. The focus on almond ingredients through the creation of almond inspired recipes were developed and utilised as a key focus in trade exhibitions in Indonesia and Malaysia in 2023. The work done in those early stages has been amplified by the utilisation of celebrity Chef Poh Lin Yeow in the market during 2025.</p> <p>The opening year of the project involved a major upgrade of the customer database which involved introducing new technology to better collect and categorise enquiries during</p>	<p>Our FHM trade mission also included a sponsorship of the exhibition's Pastry Innovations program as well as sponsorship of the Austrade expo Networking Event. The red heart snack tins remain as popular as ever and are a very effective promotional tool. The Fine Food exhibitions in Southeast Asia are an effective method of educating food industry professionals in these markets. The next step will be to pilot a mini-kitchen on the stand and prepare sample almond-focused dishes to communicate the versatility of almonds in popular local recipes.</p>  <p>As part of the Educating Food Professionals program, a series of almond-inspired recipes has been developed, aligning with the overarching Route-to-Market theme of 'cafe almonds.' The objective is to position almonds as the primary protein component in savory dishes, presenting an opportunity to educate health professionals and encourage the incorporation of almonds into local cuisines.</p> <p>This initiative is centered around cafes, leveraging the widespread adoption of cafe culture throughout Asia. This strategic approach allows the Australian Almond industry to showcase almonds not only as a snack but also as a versatile food ingredient. The Cafe-Almond strategy is designed to transition almonds from the hospitality sector to home consumption, bridging the gap from Hospitality to Food Manufacturers, then to Retailers, and ultimately reaching homes.</p> <p>This strategy aims to showcase the diverse applications of almonds, ranging from sweet to savory. It covers all eating occasions, including breakfast, lunch and dinner.</p>
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and after a trade show. The ABA receives hundreds enquiries over the year and the new system allows for communication via text, What's App and Facebook messaging.

These recipes have been featured on the Australian Almond website and will serve as an important resource to educate Food Professionals in our export markets.



Enhanced industry capability and market intelligence

Industry capability and preparedness outcomes

Improved access to market intelligence, research and reporting tools strengthened industry decision-making, preparedness and ability to respond to changing market conditions.

As part of the global trade communications program, the redevelopment of the trade websites aimed to ensure a seamless and relevant experience for the almond industry's trade partners. Acknowledging the prevalence of mobile phone usage at trade shows, the focus is on optimising accessibility for mobile devices.

The www.australionalmonds.com global website featured a new design and a streamlined menu to enhance information accessibility for the trade. This standardised design was replicated across the regional websites for India, South-East Asia, and China. Each market-specific website will feature different information and themes, ensuring the content is relevant to the target market.

The refined menu included details on the current crop, information on Australian almond growers and suppliers, almond ingredients and range, health and nutrition news and sustainability.

The revamped websites aimed to provide a snapshot of the Australian almond industry on each page, educating our trade partners about the diverse attributes and benefits almonds can

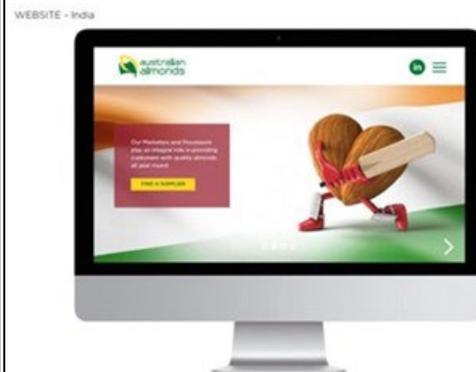
New home page for the global trade website:



New home page for the trade site for China:



New home page for the trade site for India:



New home page for the trade site for Southeast Asia:



offer.

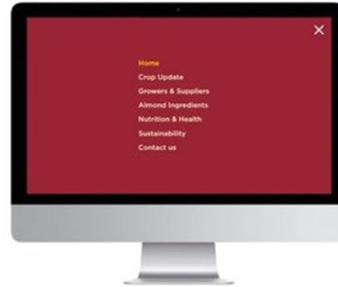
Given the large proportion of almonds being exporting to India and China, trade communications into these key markets was ramped up during the course of this project.

Co-ordinated roll-out in India involved building on in-market events like a High Commission Market Update featuring traders from across the country. Leveraging the prestige of gaining access to Australia's diplomatic headquarters attracted the top echelon of traders and retailers and attracted media attention.

In the latter stages of the project a concerted effort was made via trade comms to lift engagement with health professionals in South-East Asia. It is early days but the interest in new markets was beyond expectation.

A key feature of the redeveloped trade websites is a simplified menu structure designed for ease of use via mobile phones:

WEBSITE - Home page navigation



The scrolling design of the pages (see examples below) are also designed for easy mobile phone access:

WEBSITE - Mobile



Traffic to the Trade website:

Australian Almonds Trade Website Activity	2023*	2024	2025
Total website visitors	5074	20579	21931
Find an Almond Supplier	542	2292	1745
Grower Resources	1155	3459	3870

**2023 is partial when Google Analytics switched over*

Trade Comms case studies:

Case study 2: SE Asia trade communication events

Throughout November and December 2025, Australian Almonds delivered a targeted Health Professional campaign across Southeast Asia and Australia, offering free GP kits to support professional education and engagement. The campaign, featuring industry health professional ambassador Simone Austin and Olympic swimming champion Kyle Chalmers, performed strongly, demonstrating high relevance and uptake across priority markets.

In December alone, the campaign generated significant engagement from health professionals (including GPs, dietitians, nutritionists and allied health practitioners), with:

4,423 downloads in Malaysia,

615 in Australia,

9,176 in Indonesia

1,591 in Thailand



Case study 2: China trade communication events

The ABA delivered two trade education seminar in China late in 2025 to re-emphasise the versatility and health benefits of almonds by utilising local food professionals. See report below.

Trade Education Seminars (complete)

Date: November 10, 2025 & November 26, 2025

Venue: Shanghai & Guangzhou

Description:

The Australian Almond Trade Seminars in Shanghai (Nov 10) and Guangzhou (Nov 26) 2025 were successfully held, attracting around 30 leading traders and industry professionals at each event. Participants explored Australian almond origins, advanced farming practices, and product knowledge, gaining insight into the industry's quality standards and innovation.

Both seminars featured live cooking demonstrations by a professional chef, showcasing the versatility, flavour, and premium quality of Australian almonds. Supported by 20 editorial-style articles across trade media, the events effectively strengthened industry connections and promoted Australian almonds across China's key markets.



Seminar in Shanghai @ November 10, 2025



Seminar in Guangzhou @ November 26, 2025



Monitoring and evaluation

Monitoring and evaluation were embedded throughout the project to ensure activities remained aligned to strategic objectives, delivered value for industry and informed continuous improvement. Performance was reviewed regularly against the Key Evaluation Questions (KEQs) identified in the project's Monitoring and Evaluation (M&E) Plan, supported by quantitative reporting, qualitative feedback and ongoing stakeholder engagement.

Key Evaluation Question	Project Performance	Continuous Improvement Opportunities
Did the project support export continuity and market access for Australian almonds?	The project successfully supported continuity of Australian almond exports by maintaining tariff advantages, monitoring regulatory changes and engaging early on potential risks in key markets including China, India, the EU and Indonesia.	Future projects could extend monitoring into additional emerging markets as Australian almond exports continue to diversify.
Did activities strengthen demand for Australian almonds?	Coordinated trade, consumer and professional education activities contributed to sustained export demand and the recovery of domestic consumption to pre-COVID levels, reinforcing confidence in the Australian almond category.	Longer-term tracking of consumption behaviour could further strengthen demand measurement.
Was the project relevant to grower and exporter needs?	Activities were closely aligned to industry priorities, with a strong emphasis on protecting value, reducing risk and reinforcing Australia's premium positioning in global markets.	Increased formal feedback loops with growers could enhance future program design.
How effectively did the project adapt to global market conditions?	The project demonstrated strong adaptability, adjusting market focus, messaging and engagement in response to global supply shifts, pricing pressures and regulatory developments.	Additional scenario planning could further strengthen responsiveness to future disruptions.
Did the project build capability and confidence across the Australian almond industry?	Improved access to market intelligence, research and reporting strengthened decision-making and preparedness across the industry, supporting confidence during a period of market recalibration.	Further integration of insights into grower-facing extension could enhance capability building.

Continuous improvement was supported through regular review points, collaboration with industry stakeholders and alignment with related Australian almond initiatives. This ensured the project not only delivered outcomes during its life, but also strengthened the foundation for future market development investment on behalf of Australian almond growers.

Recommendations

The outcomes of AL22004 provide a strong platform for continued growth, resilience and value creation for the Australian almond industry.

Building on the results achieved, the following recommendations are proposed to ensure full value is realised from the investment and to guide future activity across industry, research and funding stakeholders.

Practical application of project findings

It is recommended that the Australian almond industry continues to embed market access monitoring and trade engagement as core, ongoing functions. The project demonstrated that proactive surveillance of tariffs, regulatory requirements and technical standards directly supports export continuity and value protection. Maintaining strong relationships with government agencies, international trade bodies and in-market representatives will remain critical as global competition and regulatory complexity increase.

Industry participants are encouraged to continue leveraging the premium positioning, seasonality advantage and health credentials reinforced through this project in their own marketing and sales activity. Consistent messaging across trade, consumer and professional channels will help sustain demand and reinforce Australia's reputation as a trusted supplier.

Future RD&E opportunities

The project highlighted opportunities for further research, development and extension that build directly on the outcomes achieved. Future RD&E investment could focus on deeper market intelligence in emerging and secondary markets, longer-term tracking of consumption behaviour, and enhanced analysis of return on investment across different market development activities.

There is also scope to expand research into sustainability, provenance and production practices that matter most to international buyers and consumers, ensuring Australian almonds remain aligned with evolving global expectations and purchasing criteria.

Development and adoption activities

To maximise industry-wide benefit, it is recommended that insights and learnings from this project continue to be translated into grower- and exporter-facing extension activities. This includes clear communication of market trends, regulatory developments and demand drivers through regular updates, forums and industry briefings.

Further adoption of data-driven decision-making tools, dashboards and reporting frameworks developed through the project would support improved planning and responsiveness across the industry. Continued alignment between market development activity, research outcomes and industry extension will help ensure that the value generated by this project is sustained and built upon over time.

Refereed scientific publications

N/A

Intellectual property

Usage and Attitude Study of Australian Consumers: Focus Insights Research

Issues and risks

N/A

Other information

N/A

Appendices

n/a