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ALMOND BOARD OF CALIFORNIA

Almond Almanac



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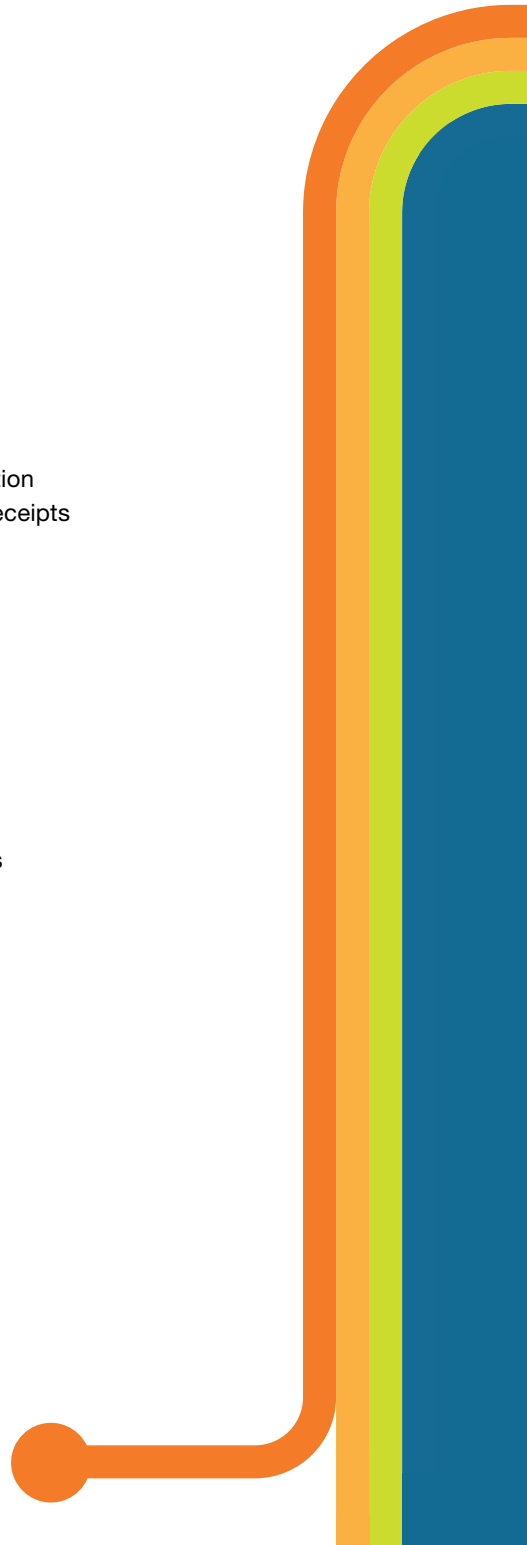
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Welcome to the *Almond Almanac*

Within these pages you will find a comprehensive overview of California almonds—the state’s #1 crop by acreage, #1 ag export, #4 crop by value and the #1 specialty crop export in the U.S.

For almond farmers and processors, this is your annual accounting of how your investment in the Almond Board of California (ABC) is leveraged to build long-term demand for California almonds around the world, as well as protect that demand from erosion due to growing challenges. It also provides an overview of the ABC-funded research that underpins the continuous improvement efforts of the California almond community.

For anyone interested in California almonds, the *Almanac* provides the latest statistics¹ about California almond production, acreage and varieties, as well as global shipment and market information.

The *Almanac* is published annually by the Almond Board of California, the Federal Marketing Order supporting the 7,600 almond farmers and 99 processors in California.

1. The statistical analyses found in the *Almanac* are prepared on a crop-year basis, spanning August 1 through July 31, and include both current and historical information. The statistical content is compiled using handler forms required by the industry’s Federal Marketing Order. Additional data, including crop estimates and farm price, are supplied by the USDA National Agricultural Statistics Service, Pacific Region Field Office.

ABC Welcomes New CEO

The Almond Board of California welcomes Clarice Turner as its new president and CEO.



Turner brings the industry decades of experience as a global leader in consumer goods, food service and wine and spirits. Turner is a ninth-generation Californian with deep family roots in farming.

“I am excited and honored to lead the Almond Board of California and to be joining this exceptional industry,” Turner said. “I have met so many remarkable people in the past couple of months who grow almonds and work throughout the industry. Your hard work and commitment to the land, your roots, your communities and to the almond industry over the years is our greatest strength.”

Turner joined the Almond Board in September. She previously served as president of iconic Napa Valley winery Joseph Phelps Vineyards, and has held CEO and senior executive positions at Boudin Bakery, Starbucks Coffee Company, YUM! Brands, Papa Murphy’s International and PepsiCo. She also has a long history of serving on corporate and non-profit boards, including the Culinary Institute of America, Delicato Family Wines, the National Restaurant Association, Washington State University Carson College of Business and San Francisco State University Lam Family College of Business.

“The impact that the almond industry has had on global agriculture and food is an incredible success story, one of perseverance, collaboration and innovation,” she said. “What you have created together is truly remarkable. It is a strong foundation to build on as we write the next chapters of the future of this great industry.”

Clarice Turner,
President and CEO,
Almond Board of California



Even in these tough times, don't lose track of what you've accomplished in the past 20 years. The success and impact of the almond industry on agriculture and the entire food world is a once-in-a-lifetime story. When so many people are fighting to survive these tough times, it can be hard to remember that what you've built is remarkable.”
—Clarice Turner



Thank you, Richard.

Dear Almond Colleagues and Friends,

With this note, I want to wish industry stakeholders around the globe all the very best in the 2023/24 crop year as we collectively build a stronger market for California almonds. Despite the current less-than-desirable economic conditions, almonds have established a solid worldwide footing and I have no doubt the industry will continue to evolve its prominent position in the global food supply for decades to come.

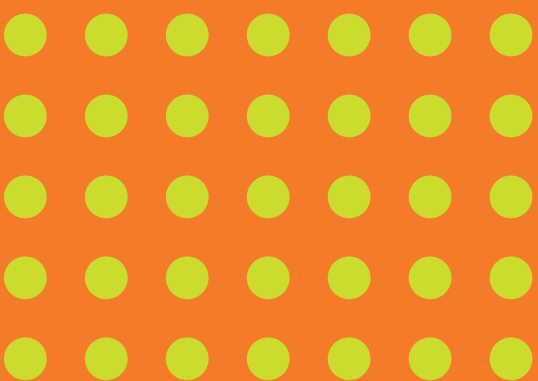
At the end of December 2023, I will step down from my leadership position at the Almond Board of California. My tenure of just over 21 years has been a remarkable experience, marked by the tremendous achievements of the 7,600 California almond growers, 99 handlers and countless aligned stakeholders who have all contributed to the transformation of almonds in the hearts, minds and diets of billions of consumers. It has been an unparalleled pleasure to work hand in hand with so many of you as we shared this journey. I can't thank you enough.

As I leave ABC, my desire is that the spirit and drive that took us from 1 billion to 3 billion pounds continues to thrive, and that you will always challenge yourselves to excel, never ceding almonds' rightful position as the premier and preferred tree nut. Almonds have earned that position through inspiration, tenacity, ingenuity, perseverance, creativity, innovation and an indefatigable desire not to just be good, but to be great.

Together with your new president and CEO, Clarice Turner, the stellar ABC staff, and dedicated Board of Directors and Committee members, I encourage you to leverage your humility, wisdom and wellness as you contribute to achieving even greater almond industry milestones in the years ahead. You can rest assured I will continue to be by your side eating my ounce of almonds each and every day!



Richard Waycott



California is one of five places on Earth with the Mediterranean climate needed to grow almonds.

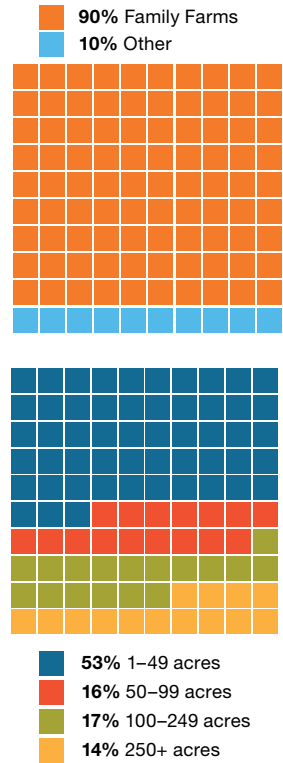
90% of almond farms are family farms

California is home to 7,600 almond farms and 90% of those farms are family farms. Many of them are owned and operated by third- and fourth-generation farmers who live on their land and plan to pass it on to their children and grandchildren.

Nearly 70% are 100 acres or less

Small or large, California's almond farmers take the long view of success based on respect for the land and local communities. Regardless of size, all almond farmers recognize that growth must be matched by an extraordinary commitment to environmental responsibility.

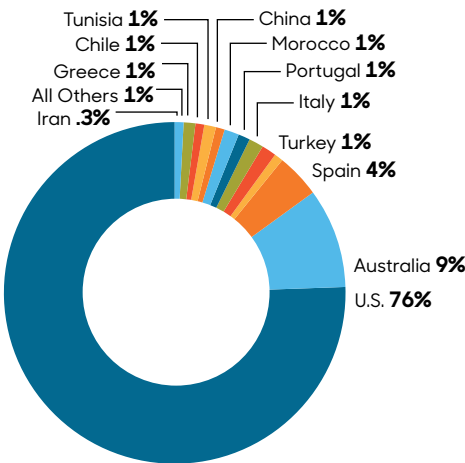
Source: USDA 2017 Census of Agriculture.



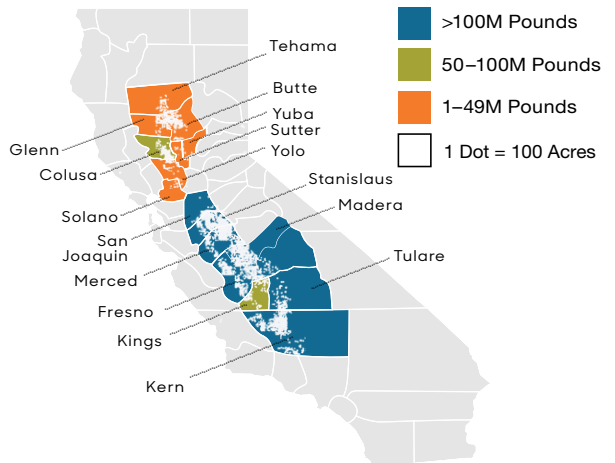
California grows nearly 80% of the world's almonds

With its Mediterranean climate, California is one of the five places on Earth where almonds can grow. And thanks to some of the best agricultural universities in the world, top research partners, water infrastructure and great soils, it is the most productive almond-growing region on the planet.

World Almond Production
crop year 2022/23*



California Almond Production
production by county | crop year 2022/23



Source: Almond Board of California, Almond Board of Australia, AEOFRUSE, Portugal Nuts, ChileAlmonds, Greek Nuts & Fruits Trade Association and other INC sources. *Totals may not add precisely due to rounding.

Processing almonds

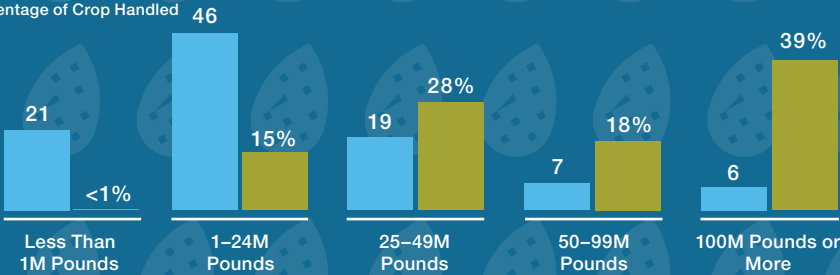
Ninety-nine almond handlers process California almonds. Many of these operations are also family-owned.



Distribution of Crop by Handler Size

crop year 2022/23

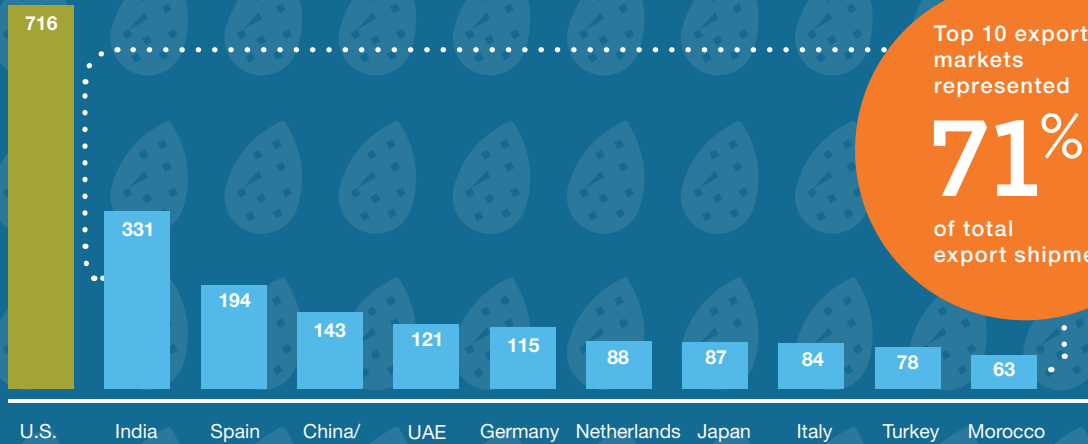
Number of Handlers
Percentage of Crop Handled



Top 10 Global Destinations for California Almonds

crop year 2022/23 | million pounds

The U.S. is the #1 global destination for California almonds in 2022/23, with a 29% share of shipments. India remains the #1 export destination for California almonds, importing more than 330 million pounds.



Top 10 export markets represented
71%
of total export shipments.

Source: Almond Board of California July 2023 Position Report.

About the Almond Board of California

The Almond Board of California was established in 1950 and is dedicated to promoting California almonds to a domestic and international audience through strategic market development, global marketing programs, ensuring food safety, and funding and promoting research about almonds' health benefits, zero waste efforts and industry best practices. The Almond Board programs are funded by a per-pound assessment on all almonds grown in California.

Board of Directors



The Board of Directors, made up of five handler and five grower representatives, sets policy and strategic priorities and approves budgets for the Almond Board to ensure California almonds remain an essential crop in California and are in demand by consumers around the world. The Almond Board programs support the Board's strategic priorities and examples of these can be found throughout the *Almanac*.

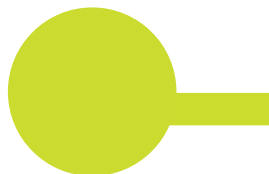
Strategic Priorities

Drive Global Demand: Build demand ahead of supply by investing in programs and research that increase market demand for almonds.

Support a Favorable Trade and Regulatory Environment: Leverage data, relationships and initiatives to help the industry produce, ship and market almonds with minimal disruption or obstacles.

Maximize Industry Efficiency: Provide targeted tools and information to enable industry members to maximize their efficiency and profitability.

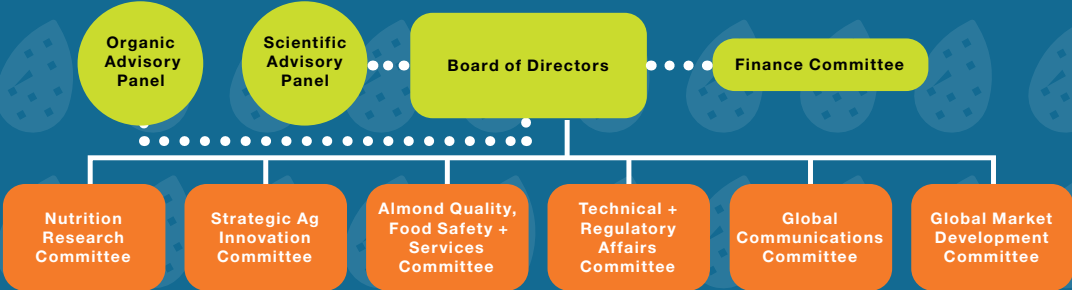
Optimize Organizational Potential: Provide exemplary leadership, coordination and efficiency at all of the levels of the Almond Board of California, leveraging resources to deliver on strategic goals and industry priorities.



Getting Involved

Nearly 200 active almond industry members volunteer on Board-appointed committees and working groups to further the work of the Almond Board. All growers, handlers, huller/shellers and allied industry members along the supply chain or affiliated with the almond industry are encouraged to get involved. The Almond Board is always eager to have new volunteers and accepts applications all year long.

Committee Structure



You're Invited

Any industry member is welcome to attend ABC committees, working groups and Board meetings without being a voting member. Check out the calendar of events to get involved.



Another way to get involved is through the **Almond Leadership Program (ALP)**. ALP is a one-year leadership training program that inspires and prepares almond community members to join a network of leaders meeting the challenges of a changing industry. Last crop year, 25 ALP alums served as members of either the Board of Directors or a committee.

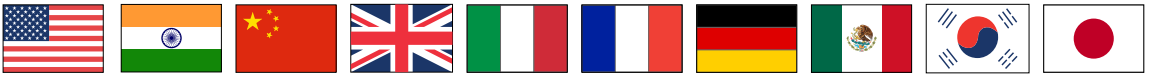
ALP Class of 2023



Current Board members who graduated from the ALP include: Alexi Rodriguez: Class of 2010 // Brandon Reberio: Class of 2015 // Darren Rigg: Class of 2015 // Katie Staack: Class of 2017 // Kelli Evans: Class of 2018

Driving Global Demand

The No. 1 strategic priority of the Almond Board is building long-term worldwide demand for California almonds. More than 80% of the Almond Board’s funding goes to driving global demand. The current market portfolio consists of the following 10 markets. The Almond Board is also doing exploratory work in Brazil, Argentina and Chile.



The Heart of All ABC Marketing



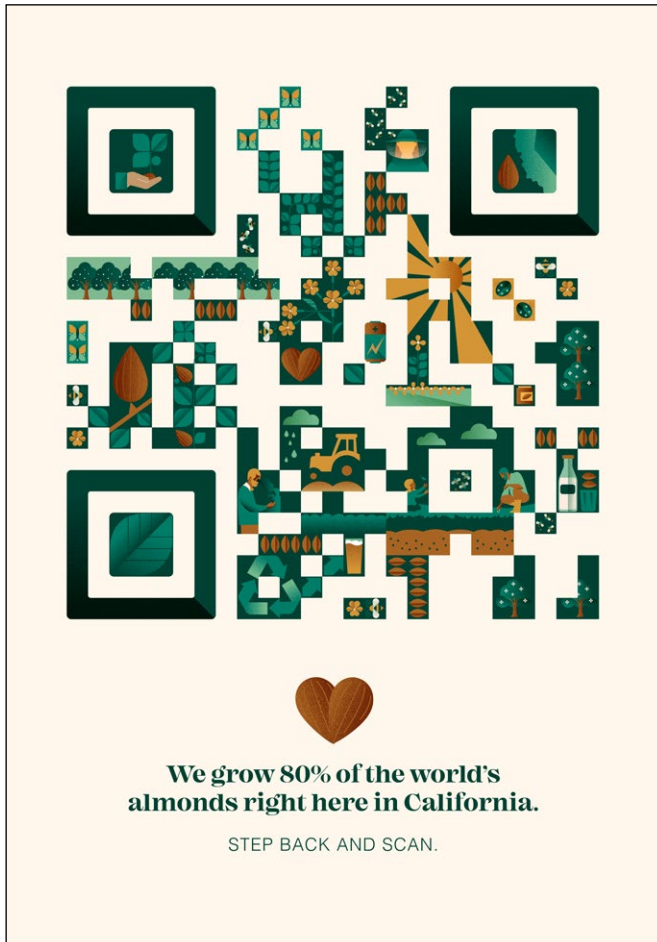
The ABC partnership with Deion “Coach Prime” Sanders shares news on ABC-funded exercise recovery research.

Almonds are a clear leader among nuts for all their health attributes. This strong “health halo” is based on 30-plus years of the Almond Board-funded nutrition research exploring a wide range of health benefits of almonds. Communicating these health benefits is at the heart of all of the Almond Board’s marketing activities. The Nutrition Research Committee is now investing in new health areas that have the potential to provide even more reasons for consumers to choose almonds. These include skin health, gut health, exercise performance, immunity and mental health. These advancements will help keep almonds top of mind for consumers and make eating almonds even more appealing.

Learn more on page 14.

Going Beyond Nutrition

Consumers in the U.S. and around the globe are increasingly interested in knowing how their food is grown—and who grows it. The Almond Board tells consumers our orchard-to-table story by introducing them to the farmers who grow almonds and by detailing all the responsible practices used throughout almond production. This “how we grow” story is proactively communicated in three markets: the U.S., Germany and the UK.



The custom-designed QR code above is currently featured in large-format advertising across California and Germany. The code directs people to a webpage highlighting the responsible practices that California's 7,600 almond farms use to grow our favorite nut. Even for those who don't click, the imagery provides a delightful sneak peek into the world of almond farming.

Stay Up to Date

Throughout the year, the Almond Board shares news about their various demand-building activities via the *In the Orchard* newsletter, a short podcast called *The Marketing Bulletin* that is part of *The Almond Journey* podcast family, and through courtesy content published in ag-focused media, including *West Coast Nut* and *National Nut Grower*.



Driving Global Demand

A Partnership of Legends

The Almond Board partnered with Deion “Coach Prime” Sanders—one of the highest-profile people in American sports this year—to spread the word about new research showing the exercise recovery benefits of almonds. TV ads ran during nationally televised NCAA and NFL football games and in sports broadcasts, targeted television and across social media and digital content.



Deion “Coach Prime” Sanders—Pro Football Hall of Famer and now college football coach shares daily practices that can help with exercise recovery—almonds every day.



In-Store Promotion

In-store shopper ads featuring “Coach Prime” appear in select grocery stores across California, Colorado, Michigan and Ohio.



Mother Nature Promotes Almonds in Germany



In Germany, consumers are looking for healthy and natural snacks in a market where power bars, protein products and supplements are booming. Almonds are the perfect solution.

The Almond Board launched a new marketing campaign in Germany this August called *The Mother of All Snacks* to reposition almonds from a baking ingredient to a snack. The campaign capitalizes on the health-minded outlook of German consumers and on the fact that almonds are among the world’s longest-cultivated plants. This impactful shift is important as Germany is the largest economy in Europe and has an almond per capita consumption equal to the U.S. at 2.27 pounds per year.

Expanding the India Program to Support Almonds' Largest Export Market

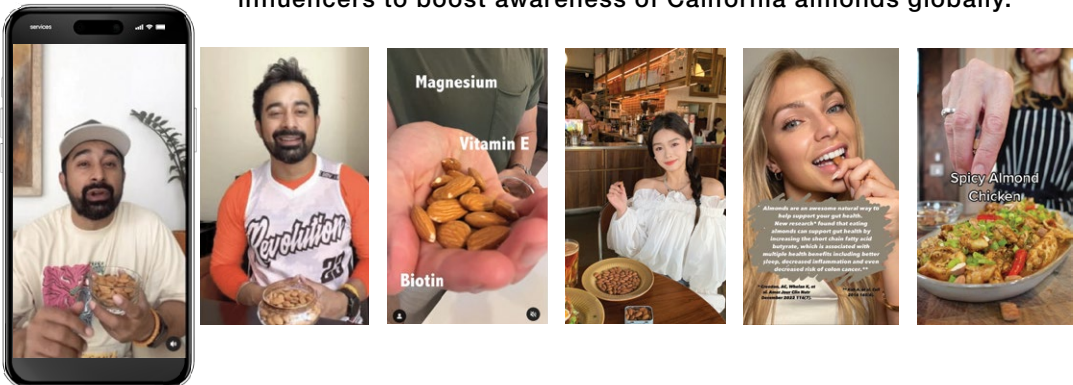
The Almond Board's marketing in India diversified in the last year to reach more consumers in new and exciting ways. They ranged from billboard displays and TV ads running during the hugely popular Cricket World Cup to partnering with modern and relevant influencers.



Billboard displays and TV ads ran in India during the International Cricket Council Men's World Cup starting in October 2023.

The Power of Influencers

The Almond Board partners with relevant and thought-provoking influencers to boost awareness of California almonds globally.



Driving Global Demand

Mobile Billboard Trucks Take Over Mexico City

California almonds took to the streets of Mexico for one month to celebrate Almond Day by driving two mobile billboard trucks covered with almond advertising. The trucks visited popular locations in Mexico City, stopping at nine shopping malls, 20 supermarkets and 15 gyms.



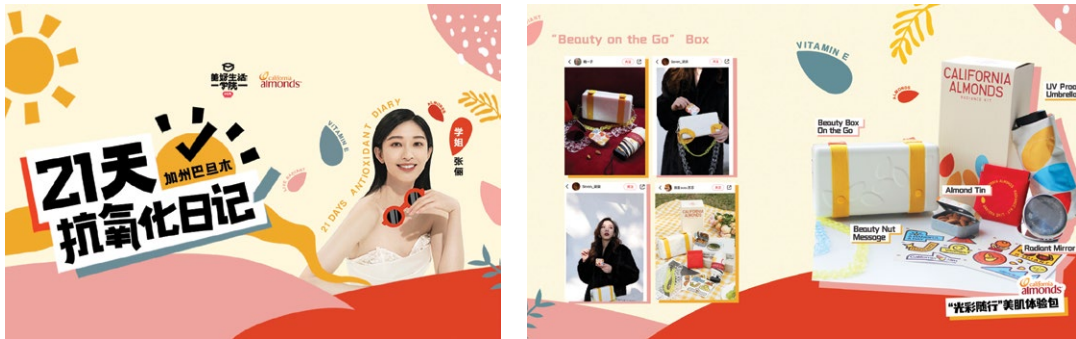
Italy's Sanremo Music Festival Fueled by Almonds

The Almond Board brought California almonds to consumers and musicians in the Italian city of Sanremo to celebrate the country's most popular song contest and highlight the natural energy you get from both almonds and music. Radio, online and social advertising and a PR campaign fronted by Italian DJs supported the activity.

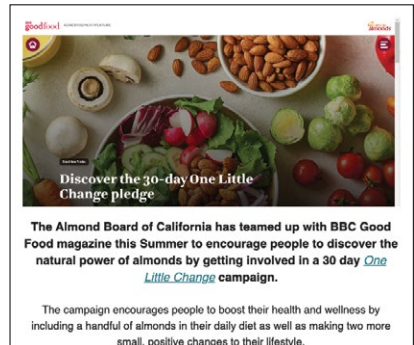


California Almonds + RED—China’s #1 Lifestyle Platform

California almonds joined forces with RED, a leading social media platform in China with a focus on lifestyle and beauty, to launch the *21 Days of Antioxidant Diary* campaign. The campaign was a smash on RED, generating an impressive 638 million impressions.

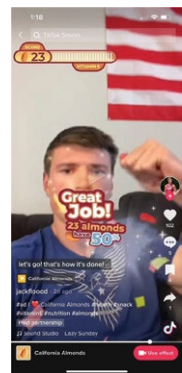


California Almonds Expanded Its Reach to Consumers through a Variety of Multimedia Partnerships



U.S. TikTok Branded Game Effect

The Almond Board collaborated with TikTok to create a featured branded game effect where users could eat some (virtual) almonds and learn fun facts while playing a TikTok game.



Driving Global Demand

Expanding Almonds' Health Halo

The Almond Board funds nutrition research probing a variety of health and nutrition fields. Our goal is to protect foundational research areas such as heart health, while we explore emerging trends and expand our research topics to continually increase our knowledge of the benefits of almonds.

We invested in more than 130 nutrition research projects since 1995, resulting in over 200 publications in peer-reviewed journals. The Almond Board published nine papers in the last crop year that contributed to the advancement of almond science.

Areas of Focus for Nutrition Research Funding

grow

- Exercise Performance + Recovery
- Gut Microbiome + Digestive Health
- Skin Health
- Diabetes + Prediabetes
- Cognitive Health

protect

- Weight + Satiety
- Heart Health

explore

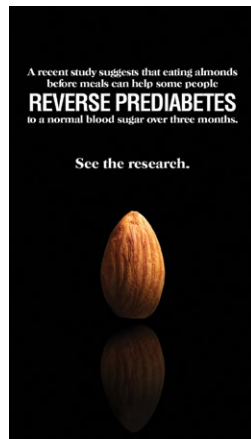
- Sleep
- Mental Health
- Healthy Aging
- Immunity
- Beauty Beyond Skin
- Diets for Personal + Planetary Health
- Cancer



Social Media Advertising

Over the last two crop years, the Almond Board has advertised nutrition research findings on heart health, gut health and diabetes in nine markets. In 2024, the Almond Board will extend this advertising to include skin health and exercise recovery research.

These social campaigns have garnered over 3.8 billion impressions globally and have been extremely effective in spreading information about the health benefits of almonds.



Driving Global Demand

Leveraging How We Grow to Build Trust

Almonds are a unique food because we use everything we grow—the hull, shell and kernel. A key initiative for the Almond Board is to spur innovation to create higher value and even more sustainable uses of almond coproducts. ABC has funded more than 90 projects in promising research in areas like recycled plastics, biofuels and regenerative agriculture. Researchers are now assessing the value proposition of possible new product streams for these coproducts, expanding their work from laboratory to actual market viability.

Almond Tree Fruit Weight crop year 2022/23

Hulls **49%**
4.064 billion pounds



Kernels **31%**
2.571 billion pounds

Shells **20%**
1.659 billion pounds

Source: Kernel Weight—USDA Incomings received by Almond Board of California. Shell & Hull Estimations—Varietal Coproduct Ratios and Production Volumes (Almond Board of California 2022).

When we say zero waste, we mean using everything we grow to make the world a better place.



HULLS AS A FOOD INGREDIENT

Working with renowned Bay Area food innovation company Mattson, the Almond Board is exploring the use of almond hulls as a food ingredient. With nutritional value from fiber, vitamins and minerals and a unique flavor profile, promising uses include bakery products, coffee and nutritional bars made with almond hulls. Mattson conceived six different ideas for almond hulls as a food ingredient and prepared proof of concepts for the most promising options. This research was recently featured on NPR station *Capital Public Radio*'s signature show *Insight with Vicki Gonzalez*.



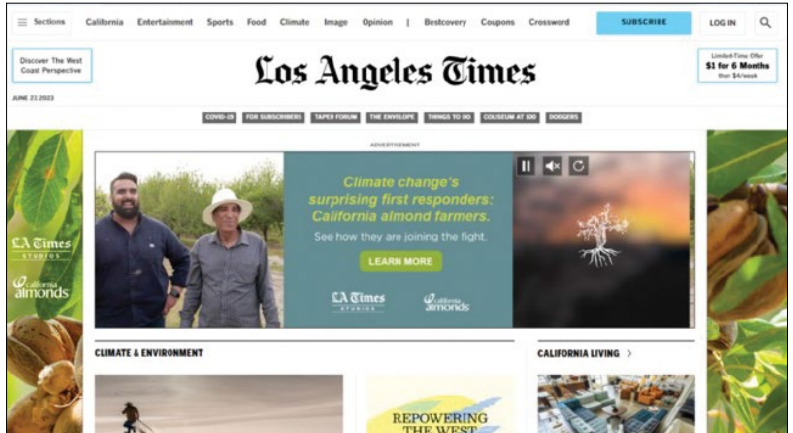
WHOLE ORCHARD RECYCLING

Almond orchards are just like forests—they capture and store carbon dioxide over their 25-year lifespans in a process known as sequestration. At the end of their productive lives, whole almond trees are ground up and incorporated back into the soil, a climate-smart approach that keeps the carbon out of the atmosphere and improves soil health, water efficiency and yields in subsequent orchards. Incentive opportunities are available to aid growers in adopting this practice.

Consumers and food manufacturers are increasingly interested in how food is grown—and who grows it.

Los Angeles Times

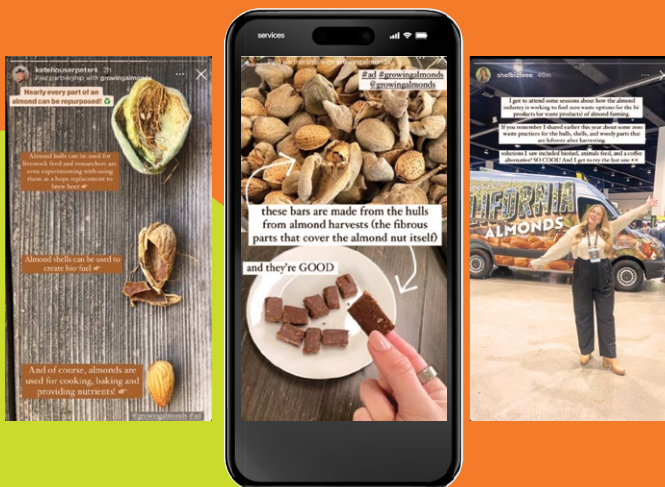
Top-tier media outlet the *Los Angeles Times* is respected worldwide and especially within California. We partnered with them in 2023 to shine a spotlight on how almond farmers serve as “first responders” to climate change. At the heart of the narrative is Mallvinder Kahal, a second-generation Madera-based almond farmer. He and his family speak about the important initiatives underway on their farm and throughout the industry.



A long-form online article, mini documentary video and advertising were key to the partnership with the LA Times. The partnership also featured an almond homepage takeover on the LA Times' website—Summer 2023.

Brigitte

We also partnered with two of the best-known women's lifestyle magazines in Germany, *Brigitte* and sister publication *Brigitte Be Green*, with a focus on sustainable living. A four-minute video featuring ABC Board member and grower Christine Gemperle addressed the single biggest concern Germans have about California almonds—water use—head on. Christine described the almond industry's climate-smart practices, bringing to life the work in areas such as water efficiency and zero waste to show all the ways almond farmers are part of the climate change solution.



The Almond Board continued its partnership with social media influencers this past year to connect almond farms with consumers and showcase how California almonds are responsibly grown.

Driving Global Demand

Powering Almond Product Innovation Across the Globe

Through broad-reaching activities such as advertising, engaging with trade media, hosting events, attending trade shows and more, the Almond Board creates multiple touchpoints throughout the year to educate and inspire a range of audiences from the trade to food professionals to work with almonds.

Inspiring Almond Innovation through Advertising



Student Competition Inspires Almond Snacks

The Almond Board partnered with Drexel University to host their first-ever student competition, challenging the next generation of food professionals to develop almond-based snacks.

The competition inspired nine product concepts.



Drexel University Food Lab work in process, some of the students and final output being shared at a trade show.

Almond Education Shared through Webinars and at Global Trade Shows

The *Almond Consumption* webinar drew 144 live attendees with interest from companies such as KIND Snacks, Cargill, Kraft Heinz, PepsiCo, Campbell's and more.



FREE WEBINAR

FROM CLICK TO CONSUMPTION

REGISTER NOW

JANUARY 25, 2023

california almonds

Educational Materials Supporting Almond Creations

Generating Buzz with Trade Media

E-mail Marketing

Clearing the Regulatory and Trade Path



Doug McKalip (third from left), Chief Agricultural Negotiator in the Office of the United States Trade Representative, visits an almond orchard.

Successfully producing California almonds and shipping them to more than 100 countries around the world requires a constant and comprehensive focus on technical issues and regulatory needs. It also requires building and maintaining strong relationships with key stakeholders globally. This is why the Almond Board of California made supporting a favorable trade and regulatory environment a key strategic priority. Remaining profitable means increasing industry efficiency as well as driving global demand, and both are shaped by complex trade relationships and evolving stakeholder priorities.

Updated Trade Strategy

The Almond Board continually works to improve market access by monitoring and addressing issues including tariffs and technical barriers to trade in current and emerging markets. To make these efforts even more effective, we developed a new strategy that identifies potential tariff reductions and technical barriers, explores opportunities and supports global demand-building priorities. It also leverages global industry partner associations to amplify almond priorities—a key element to finding solutions to technical barriers to trade—particularly as we expand exports into new markets.



EU:	Almonds #2 ag export (\$1.5B) behind soybeans (\$2.3B).
INDIA:	Almonds #1 ag export (\$844M), accounting for over 39% of all U.S. ag exports to India.
CHINA + HK:	Almonds #2 tree nut export (\$263M) and #15 ag export overall.
UAE:	Almonds #1 ag export (\$311M), accounting for 25% of all U.S. ag exports.
JAPAN:	Almonds #11 ag export overall (\$244M).

Current Landscape for California Almonds



Efforts to ensure U.S. government officials understood the importance of the Indian market culminated in India's announcement in June that retaliatory tariffs on California almonds would be lifted, bringing duties back to 2019 levels.



The almond industry formally requested tariff suspensions on almonds in the Philippines and the UK. The Almond Board is working with in-country partners in other markets to explore similar tariff suspension requests.



China's Decree 248 facility registration law that went into effect on Jan. 1, 2022 could have further limited access to the China market. The Almond Board staff worked with the USDA's Foreign Agricultural Service and the FDA to help handlers navigate the new requirements. As a result, 65 handlers successfully completed their General Administration of Customs in China (GACC) registrations, valid for the next five years. ABC is now working with the FDA to develop a system to assist new companies to register with GACC.



The USDA periodically uses an authority called Section 32 to purchase excess commodities and distribute them to food banks and school meal programs. Over the past two years, the Almond Board worked with the Almond Alliance to have the USDA buy almonds under this authority, resulting in the purchase of approximately 56 million pounds of almonds. ABC provided resources for handlers to directly participate in the program.



Although retaliatory tariffs on almonds were lifted by India, they remain in place in China and Turkey. It is estimated that between 2018 and 2022, retaliatory tariffs and Australia's favorable trade position cost California almonds a value loss of \$554 million and a volume loss of 157 million pounds.

Competitors like Australia and the EU continue to pursue trade agreements around the globe that would give them favorable market access and preferential market positions. In India, Australia has a 50% reduction in tariffs on up to 34,000 metric tons of almonds shipped. Further reductions could result from additional Australia-India negotiations.

Free Trade Agreements Comparison

	AGREEMENTS IN FORCE	COUNTRIES COVERED
United States	14	20
Australia	17	29
European Union	46	78



Stay Up to Date

The Almond Byte podcast regularly features the latest trade and regulatory issues from the Almond Board's Global Technical and Regulatory Affairs team. Episodes air every two weeks. Simply search *Almond Journey* podcast wherever you get your podcasts and subscribe.



Educating Government Officials

The Almond Board of California can leverage its extensive research and fact-based information to engage with government officials in efforts to educate and inform them about issues important to almonds.

As part of these efforts, the Almond Board annually takes a delegation of industry representatives to Washington, D.C. to discuss the state of the industry and provide data on key issues. The delegation meets with U.S. Congressional representatives as well as leaders of key agencies that have a nexus point with almonds. This year, the ABC delegation met with leaders of the Office of the U.S. Trade Representative, four USDA agencies, the FDA, the EPA and five members of the House of Representatives.



Delegation members (left to right) Jonathan Hoff, Brandon Rebiero, Alexi Rodriguez, Gabriele Ludwig, Julie Adams, Richard Waycott, Brock Densel



USDA-FAS MPACT (Mid-Professionals Advancing Careers Together) group visited ABC in late August to learn about the almond industry.



Since 2013, the Almond Board and the Almond Alliance have worked together through a Memorandum of Agreement that allows the Alliance to access ABC staff time and expertise to support their advocacy efforts. While ABC can educate policymakers, the Almond Alliance is able to use that information to advocate for industry priorities and policies. Ultimately, these combined efforts encourage support among those who are making decisions that impact how almonds are grown and sold. Common areas where this strategy is used include both state and federal legislative and regulatory issues.

Record-Breaking Rains and Snowpack

The winter of 2022-23 created perfect conditions to use almond orchards for groundwater recharge.

On-farm groundwater recharge applies excess winter floodwater to dormant orchards, allowing it to seep down and restore groundwater. In 2021, the Almond Board and Sustainable Conservation published the *Introduction to Groundwater Recharge* guide to answer common questions growers have. This year, the Almond Board co-sponsored nearly a dozen grower-to-grower workshops, answering common questions from growers about the adoption of groundwater recharge practices. Efforts are also underway to identify incentives for these important practices.

Groundwater Recharge in Action

ABC Board member Christine Gemperle hosted California Secretary of Agriculture Karen Ross and Secretary of Natural Resources Wade Crowfoot on her farm to see on-farm recharge in action. Not only does it redirect storm runoff across farmland to reduce downstream flooding, it also recharges aquifers as that water soaks into the ground.



Did you know?

In March 2023, Governor Gavin Newsom issued an executive order to use floodwater to recharge and store groundwater, making the practice more easily achievable by irrigation districts and almond growers. Working groups such as California Department of Water Resources Flood-Managed Aquifer Recharge network worked to remove barriers to maximizing recharge. Use the QR code to learn more.




Serving the Industry through Research and Outreach

The Almond Board of California works with trusted partners and industry experts to serve the industry through research, outreach and continuous listening, learning and adaptation to industry needs.

Funded by grower assessments, the Almond Board-supported research adds value to the industry by:





- 1 **IMPROVING GROWER PROFITABILITY AND PROVIDING TOOLS TO MEET INCREASINGLY COMPLEX REGULATORY REQUIREMENTS ON FARMING.**
- 2 **SUPPORTING ALMOND MARKET DEVELOPMENT THROUGH:**
 - Expanding the global health halo for almonds.
 - Demonstrating grower stewardship because of how we grow.
 - Increasing the value derived from almond co-products.
- 3 **SUSTAINING THE REPUTATION OF CALIFORNIA ALMONDS AS THE HIGHEST QUALITY.**

Industry Adoption and Impacts

	Research Partners	Grower Impact	Industry Impact
Irrigation 	UC Davis UC Cooperative Extension USDA	Research into how much and when to irrigate has helped improve grower returns through the adoption of pressurized systems, ETC-based scheduling, deficit irrigation, pressure chamber use, flow meters and soil moisture sensors.	Water use efficiency improved by 33% between 1990s and 2010s. 85% adoption of pressurized systems, nearly two times the rate of CA farms overall. Increased adoption of flow meters (57%) and soil moisture sensors (59%) to increase irrigation precision.
Nitrogen Management 	California Department of Food and Agriculture USDA Industry Partners	The implementation of nitrogen management research has contributed to increased grower returns—ensuring growers apply nitrogen at the right rate, at the right time, in the right place and using the right source, all while remaining compliant with changing regulations.	Threefold increase in grower use of nitrogen budgeting, from 30% in 2010 to 97% use now. 10% decline in orchards over-applying, above 225 lbs/acre. Average nitrogen application decreased from 200 lbs/acre (2012-2016) to 188 lbs/acre (2017-2021).
Harvest 	UC Davis Texas A&M University	Research on harvest dust has helped growers meet regulatory requirements while reducing the cost of new equipment. It has informed air quality regulations, reducing proposed regulations on dust, and it has contributed to the creation of grower incentives for low-dust harvesters.	The San Joaquin Valley Air Pollution Control District has offered incentives covering up to 50% of the cost of eligible new, low-dust equipment. USDA Natural Resources Conservation Service (NRCS), through the Environmental Quality Incentives Program, incentivizes growers to use low-dust harvest equipment, paying approximately \$56 per acre.

Measuring the Impact of Research

The true measure of success is the industry's adoption of research findings and the positive impacts on the operations of growers, huller/shellers and handlers gained from research-based changes.

	Research Partners	Grower Impact	Industry Impact
<p>Food Safety</p> 	<p>UC Davis Technical Expert Review Panel</p>	<p>Food safety research that led to the pasteurization rule put the industry ahead of the curve on regulations and continues to maintain our market reputation for the highest-quality almonds.</p>	<p>Zero salmonella outbreaks in nearly 20 years.</p> <p>FDA recognition on 4-log performance criteria and broad program performance.</p> <p>No additional compliance requirements under the Food Safety Modernization Act.</p>
<p>Whole Orchard Recycling</p> 	<p>UC Davis UC Cooperative Extension California Department of Food and Agriculture</p>	<p>Whole Orchard Recycling (WOR) research found increases in yield and water-use efficiency while improving carbon sequestration in the soil. This practice also provides growers with options to comply with the restrictions to ag burning in the San Joaquin Valley.</p>	<p>52% of farms replanting orchards used WOR in 2022.</p> <p>Demonstration of almond stewardship as a low carbon and zero waste food in marketing to consumers and food companies.</p> <p>WOR is now included in several incentive opportunities:</p> <ul style="list-style-type: none"> • CDFA Healthy Soils Program: Up to \$860 per acre. • The San Joaquin Valley Air Pollution Control District offers as much as \$1,000 per acre for operations less than 100 acres, or \$600 for larger operation sizes. • NRCS: up to \$1,200 per acre (dependent on specific practices).
<p>Cover Crops</p> 	<p>UC Davis UC Cooperative Extension</p>	<p>Research into cover crops has shown benefits for pollinators and for soil quality, improving water infiltration and holding capacity, nutrient cycling and some pest management.</p>	<p>Adoption of cover cropping in almond orchards has increased 300% from 2016 to 2022.</p> <p>Demonstration of industry's biodiversity stewardship in marketing to consumers and food companies.</p> <p>Progress toward agreements with state and federal agencies to protect growers from endangered species listing implications.</p>
<p>Rootstocks</p> 	<p>Private Nurseries UC Davis UC Riverside USDA</p>	<p>Research in rootstock development and evaluation, in collaboration with major private nurseries, provides nurseries and growers with information to select the appropriate rootstock based on regional soil and pest conditions.</p>	<p>Improved grower returns by approximately \$20,000 per acre when comparing industry standard rootstocks.</p> <p>More tools for effective pest and disease control in the face of increasing fumigation restrictions.</p>



Beyond the Nut: The Value of Everything in the Orchard

As food companies and consumers increasingly make choices based on how food is grown, it is clear almonds are good for the planet and good for human health.

- We grow four crops per drop with the use of almond hulls for dairy feed reducing the need to grow as much alfalfa, saving more than 440 billion gallons of water.¹
- California's almond trees store 30 million metric tons of carbon,² equivalent to taking 24 million cars off the road for a year³
- Growers are building biodiversity and soil health, with almond orchards housing half a million acres of cover crops and 170,000 acres of Bee-Friendly Farms—86% of all U.S. bee-friendly certified farms⁴
- Ounce for ounce, almonds are the tree nut highest in protein, fiber, calcium, vitamin E, riboflavin and niacin⁵

1. UC Davis, Department of Agricultural and Resource Economics. Sample Cost Study Alfalfa Hay and Organic Alfalfa Hay. 2020.

2. California Air Resources Board. An Inventory of Ecosystem Carbon in California's Natural & Working Lands. 2020.

3. U.S. Environmental Protection Agency. Greenhouse Gas Equivalencies Calculator. July 2023.

4. Pollinator Partnership. January 2023.

5. USDA-ARS. National Nutrient Database for Standard Reference, Release 28, 2015.

Did you know?

California's almond trees store
30 million metric tons of carbon.¹
That's the same as a year of:



**TAKING 24 MILLION CARS
OFF THE ROAD²**



GROUNDING 3,134 BOEING 737s³



**SHUTTING DOWN 29 COAL-
FIRED POWER PLANTS²**

1. California Air Resources Board. An Inventory of Ecosystem Carbon in California's Natural & Working Lands. 2020.

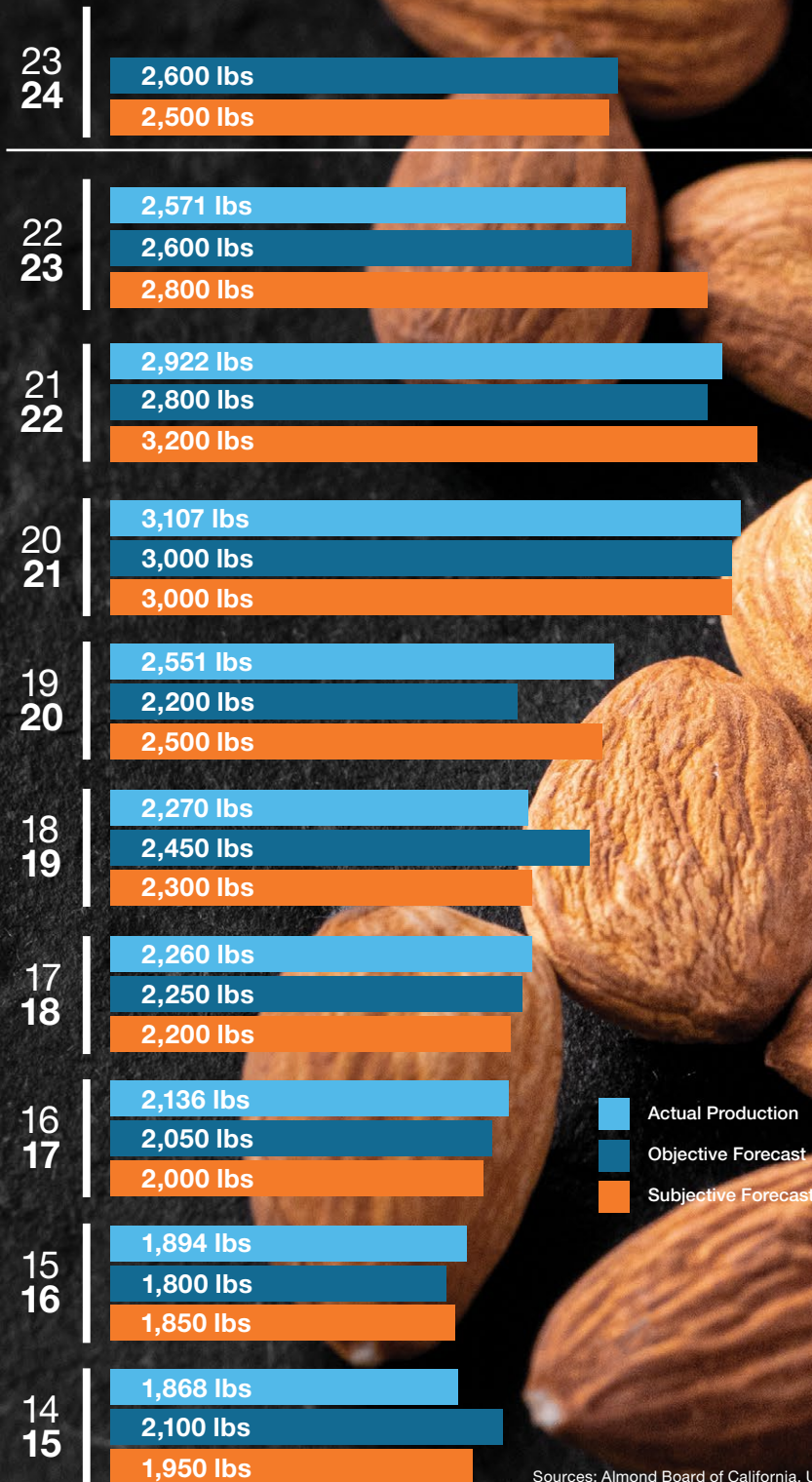
2. U.S. Environmental Protection Agency. Greenhouse Gas Equivalencies Calculator. July 2023.

3. Reuters. Boeing jets emissions data highlights industry's green challenge. April 2021. Assumes industry average 25-year operable lifespan.

Forecasts vs. Actual Production

California Almond Forecasts vs. Actual Production

crop years 2014/15–2023/24 | million pounds



Sources: Almond Board of California. USDA-NASS Pacific Regional Office.

California Almond Crop Estimates vs. Actual Receipts

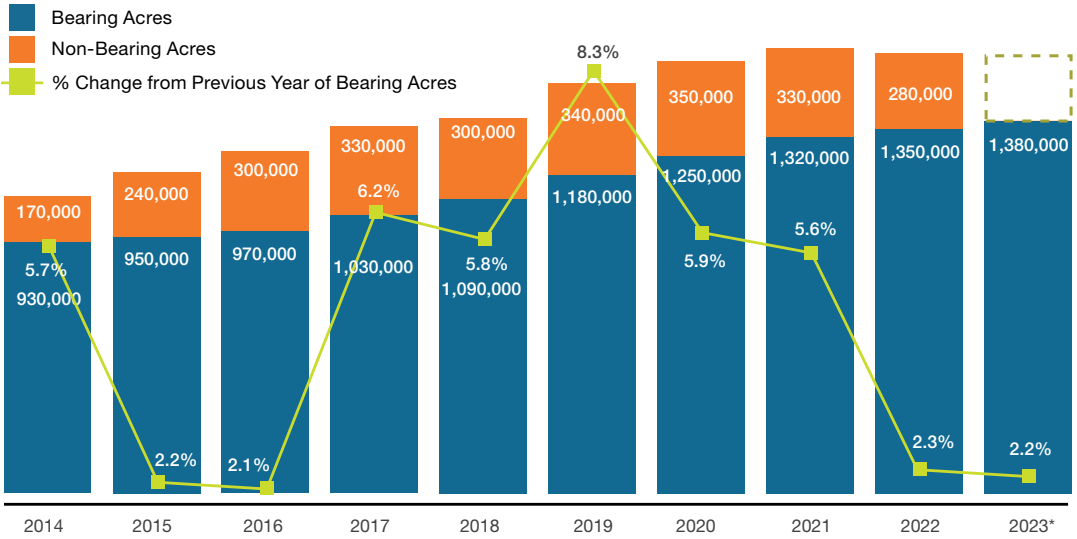
crop years 2004/05–2023/24 | million pounds

Crop Year	Objective Forecast	Handler Receipts	Loss and Exempt	Redetermined Marketable Weight	Lbs. Rejects in Receipts
2004/05	1,080.0	998.0	25.2	972.8	14.5
2005/06	880.0	911.7	23.0	888.7	16.0
2006/07	1,050.0	1,116.7	28.9	1,087.8	24.0
2007/08	1,330.0	1,383.0	24.7	1,358.3	17.2
2008/09	1,500.0	1,614.6	42.7	1,571.9	13.9
2009/10	1,350.0	1,405.9	26.9	1,379.0	19.6
2010/11	1,650.0	1,628.2	27.9	1,600.3	18.1
2011/12	1,950.0	2,020.4	40.5	1,979.9	16.1
2012/13	2,100.0	1,884.0	35.6	1,848.4	23.1
2013/14	1,850.0	2,009.7	39.0	1,970.7	21.0
2014/15	2,100.0	1,867.9	29.3	1,838.6	23.4
2015/16	1,800.0	1,894.4	47.8	1,846.6	25.3
2016/17	2,050.0	2,135.7	48.3	2,087.4	26.0
2017/18	2,250.0	2,260.5	48.6	2,211.9	54.8
2018/19	2,450.0	2,269.6	46.2	2,223.3	39.3
2019/20	2,200.0	2,551.2	47.0	2,504.2	42.1
2020/21	3,000.0	3,107.0	50.8	3,056.1	44.0
2021/22	2,800.0	2,922.0	59.4	2,862.6	57.2
2022/23	2,600.0	2,571.1	43.0	2,528.1	54.6
2023/24 [†]	2,600.0	*	52.0	2,548.0	*

Source: Almond Board of California. Objective forecast provided by USDA-NASS Pacific Regional Office. *Not available at time of publication. [†]Estimated.

Crop

California Almond Acreage 2014–2023



Source: USDA Agricultural Statistics Service, Pacific Region (NASS/PR) 2022 Acreage Report. *Estimate.

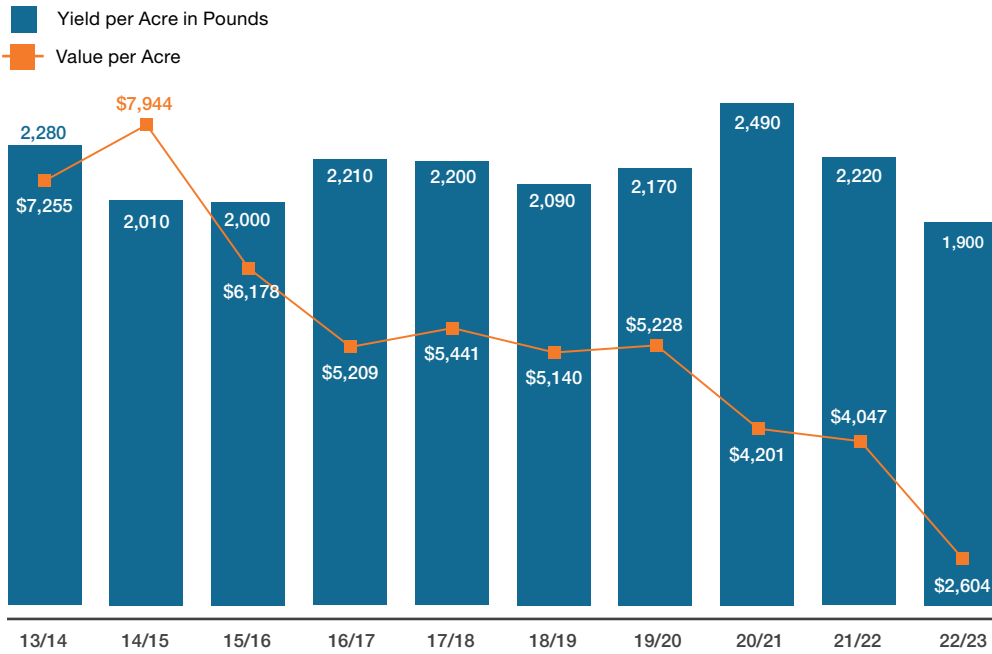
California Almond Acreage + Farm Value crop years 2014/15–2023/24

CROP YEAR	Acres			FIRST YEAR PLANTINGS	AVERAGE TREES PER ACRE	Yield		Value		
	BEARING	NON-BEARING	TOTAL			BEARING ACRE YIELD (LBS.)	PRODUCTION* (MILLION LBS.)	FARM PRICE	FARM VALUE (\$1,000)	VALUE PER BEARING ACRE
2014/15	930,000	170,000	1,100,000	55,615	114.0	2,010	1,868	\$4.00	\$7,388,000	\$7,944
2015/16	950,000	240,000	1,190,000	65,355	114.0	2,000	1,894	\$3.13	\$5,868,750	\$6,178
2016/17	970,000	300,000	1,270,000	60,161	116.0	2,210	2,136	\$2.39	\$5,052,460	\$5,209
2017/18	1,030,000	330,000	1,360,000	54,696	117.0	2,200	2,260	\$2.53	\$5,603,950	\$5,441
2018/19	1,090,000	300,000	1,390,000	48,115	119.0	2,090	2,270	\$2.50	\$5,602,500	\$5,140
2019/20	1,180,000	340,000	1,520,000	32,690	122.0	2,170	2,551	\$2.45	\$6,169,100	\$5,228
2020/21	1,250,000	350,000	1,600,000	25,666	122.0	2,490	3,107	\$1.71	\$5,251,410	\$4,201
2021/22	1,320,000	330,000	1,650,000	21,178	122.0	2,220	2,922	\$1.86	\$5,341,920	\$4,047
2022/23	1,350,000	280,000	1,630,000	11,160	122.5	1,900	2,571	\$1.40	\$3,515,400	\$2,604
2023/24†	1,380,000	†	†	†	124.7	1,880	2,600	July 2024	July 2024	July 2024

Source: USDA, NASS/PRO. Note: Almond Board does not track prices. *Production numbers provided by Almond Board of California. †Estimated as of September 1, 2023. ‡Not available at time of publication.

Crop Value + Yield per Bearing Acre

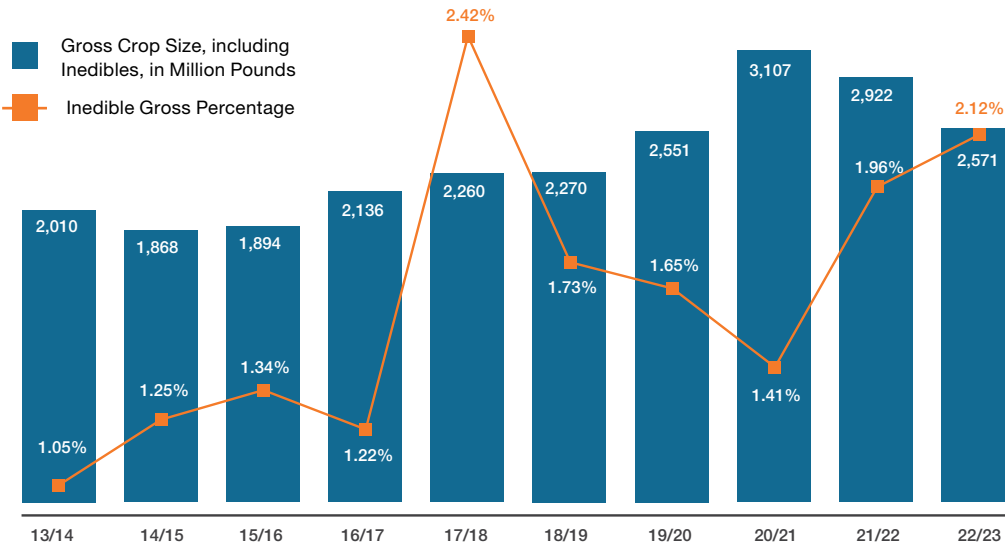
crop years 2013/14–2022/23



Source: USDA, NASS/PRO 2023 California Almond Objective Forecast.

California Almond Crop-Size History + Inedible Percentage

crop years 2013/14–2022/23



Source: Almond Board of California.



170,000+ acres of almond orchards are recognized bee-friendly, representing 86% of all bee-friendly certified U.S. farms.

Source: Pollinator Partnership, January 2023.

Crop

California Almond Receipts by County + Variety

crop year 2022/23 | in pounds

Counties	% Crop	Nonpareil	Monterey	Independence	Butte/Padre	Carmel	Fritz	All Others	All Varieties
Northern									
Butte	1.4%	15,793,578	3,150,673	1,673,339	3,189,387	2,740,261	194,978	10,199,355	36,941,571
Colusa	2.6%	31,652,113	9,559,030	2,167,805	7,359,837	4,920,529	2,707,422	7,238,254	65,604,990
Glenn	1.3%	17,639,482	3,084,942	647,449	3,634,170	2,667,454	239,315	4,871,706	32,784,518
Solano	0.6%	4,284,052	1,421,387	6,869,273	1,248,641	571,400	0	1,827,680	16,222,433
Sutter	0.3%	1,904,715	1,211,301	3,051,594	400,087	208,289	4,641	718,501	7,499,128
Tehama	0.4%	5,199,989	923,450	694,083	760,454	876,687	0	1,816,958	10,271,621
Yolo	1.4%	13,959,627	6,983,139	4,660,910	2,917,281	1,704,072	575,775	5,315,431	36,116,235
Yuba	0.1%	348,691	157,371	1,128,907	145,423	71,341	23,282	245,925	2,120,940
Others	0.2%	1,418,520	353,580	2,606,519	123,522	18,992	65,754	642,715	5,229,602
Totals	8.3%	92,200,767	26,844,873	23,499,879	19,778,802	13,779,025	3,811,167	32,876,525	212,791,038
Central									
Merced	11.2%	108,642,943	45,279,544	37,103,048	31,114,666	12,455,756	8,512,301	44,380,207	287,488,465
San Joaquin	7.4%	64,296,662	11,695,189	50,116,946	14,212,611	15,078,721	4,355,579	31,461,498	191,217,206
Stanislaus	14.9%	134,634,324	36,050,166	79,322,884	33,403,430	29,254,725	8,860,237	61,851,954	383,377,720
Others	0.1%	965,280	717,025	996,628	134,368	203,345	2,247	535,807	3,554,700
Totals	33.7%	308,539,209	93,741,924	167,539,506	78,865,075	56,992,547	21,730,364	138,229,466	865,638,091
Southern									
Fresno	20.2%	187,583,318	118,729,154	82,183,362	45,958,871	4,238,085	9,938,347	69,626,248	518,257,385
Kern	17.8%	196,637,566	136,034,854	21,688,938	37,857,053	5,539,738	25,672,145	34,148,628	457,578,922
Kings	2.6%	23,904,037	17,690,984	13,100,815	5,300,190	44,285	643,399	7,186,295	67,870,005
Madera	11.8%	130,398,281	71,343,695	14,476,096	26,207,511	6,951,421	9,581,804	45,122,387	304,081,195
Tulare	5.6%	57,623,812	35,367,130	27,091,918	6,550,547	916,228	4,761,612	12,372,449	144,683,696
Others	0.0%	67,039	235,961	38,128	0	4,206	0	24,061	369,395
Totals	58.1%	596,214,053	379,401,778	158,579,257	121,874,172	17,693,963	50,597,307	168,480,068	1,492,840,598
Grand Total	100.0%	996,954,029	499,988,575	349,618,642	220,518,049	88,465,535	76,138,838	339,586,059	2,571,269,727

* Totals may not add precisely due to rounding Source: USDA Incoming Receipts.
Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre.

California Almond Production by County

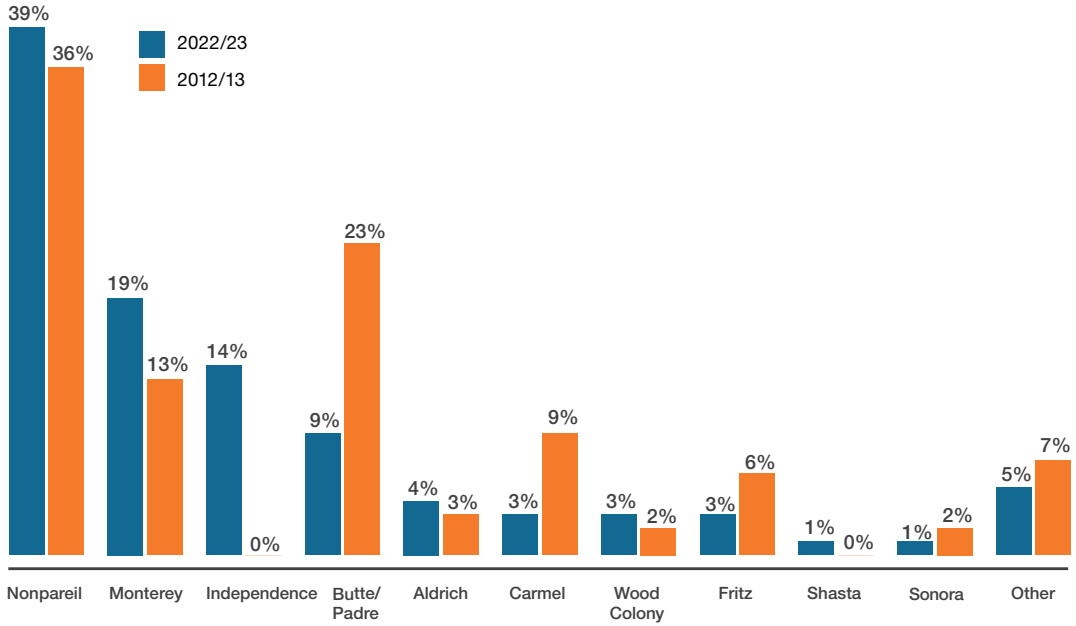
crop years 2013/14–2022/23 | million pounds

	Colusa	Butte	Yolo	Glenn	Solano	Tehama	Sutter	Yuba	Stanislaus	Merced	San Joaquin	Fresno	Kern	Madera	Tulare	Kings	All Others	Total
	Northern								Central			Southern						
2013/14	103.6	56.0	22.5	69.7	6.0	14.7	7.3	-	284.9	213.8	95.9	398.1	427.2	216.9	55.8	32.6	1.9	2,006.9
2014/15	90.2	55.2	18.1	58.7	5.1	13.3	7.7	-	274.4	198.2	94.3	370.5	390.3	202.9	57.0	31.9	1.9	1,869.7
2015/16	109.7	57.4	27.3	75.4	6.0	16.0	7.4	-	260.7	188.7	97.2	376.5	366.1	215.2	53.9	32.4	2.3	1,892.1
2016/17	104.0	54.3	28.0	68.9	6.2	17.4	8.3	-	291.0	222.3	104.9	433.2	433.2	242.6	73.9	40.3	2.1	2,130.6
2017/18	112.9	52.1	39.7	72.6	8.4	18.6	8.7	-	303.2	223.7	108.7	494.4	429.5	264.0	80.9	43.6	2.4	2,263.7
2018/19	96.8	57.1	39.4	69.4	11.3	16.2	9.0	-	341.9	235.1	135.5	462.4	398.2	261.4	81.1	48.5	4.7	2,268.1
2019/20	113.6	43.2	55.8	63.5	14.5	18.4	10.4	1.3	302.3	223.4	124.4	598.3	491.7	298.9	116.4	68.8	6.8	2,551.5
2020/21	156.2	70.6	79.5	96.0	29.7	29.9	19.3	2.7	437.2	305.9	177.9	655.5	495.7	351.3	120.1	78.9	8.5	3,114.9
2021/22	117.7	51.4	65.2	77.0	31.3	28.1	18.3	2.9	414.5	294.1	181.0	610.3	473.6	333.8	134.0	74.7	10.4	2,918.5
2022/23	65.6	36.9	36.1	32.8	16.2	10.3	7.5	2.1	383.4	287.5	191.2	518.3	457.6	304.1	144.7	67.9	9.1	2,571.3

Source: USDA, Report of Inedible Content of Almond Receipts.

Top 10 Almond-Producing Varieties

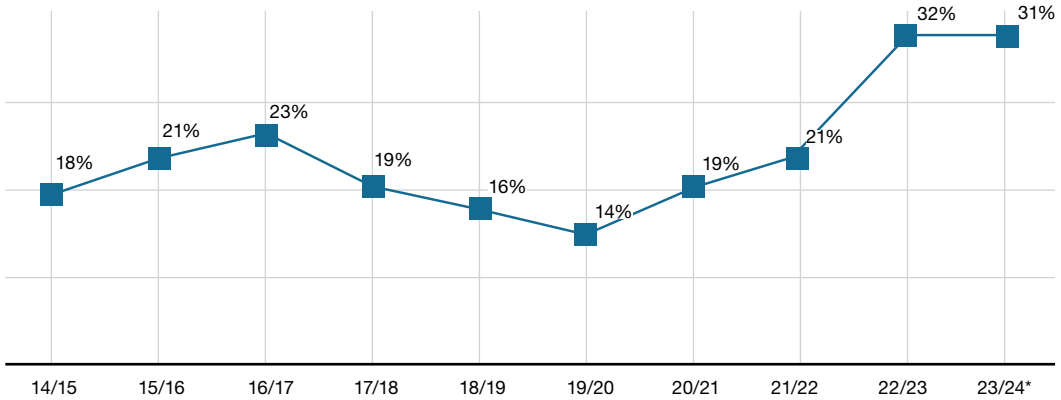
crop years 2012/13 vs. 2022/23



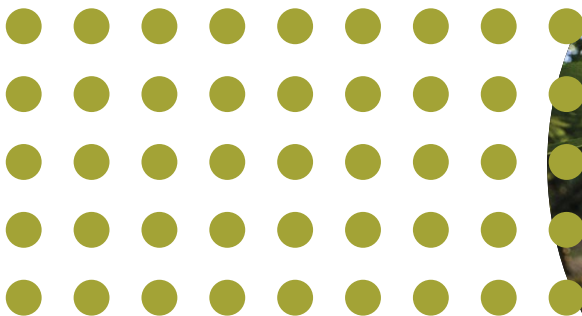
Source: USDA Incoming Receipts. Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre. Totals may not add precisely due to rounding.

Carry-In as a Percentage of Prior Year Shipments

crop years 2014/15–2023/24



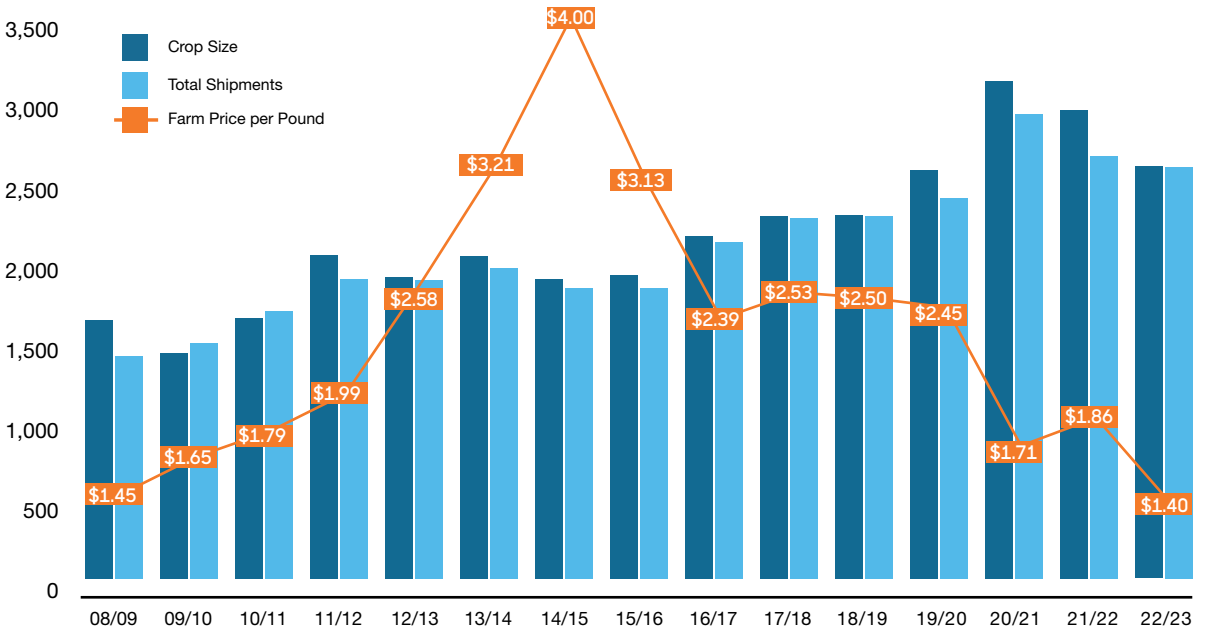
Source: Almond Board of California. *Forecasted.



Crop + Shipments

Historical Crop Size + Shipments vs. Farm Price

crop years 2008/09–2022/23 | million pounds



Sources: Almond Board of California. USDA, NASS/PRO.

Position Report of California Almonds

crop years 2013/14–2023/24 | million pounds

Crop Year	Redetermined Marketable Weight	Carry-In	Reserve	Total Salable Supply	Domestic Shipments	Export Shipments	Total Shipments	Salable Carry-Over
2013/14	1,970.0	317.2	N/A	2,287.2	641.8	1,295.6	1,937.4	350.6
2014/15	1,838.6	350.6	N/A	2,189.2	639.4	1,173.1	1,812.5	376.6
2015/16	1,846.6	376.6	N/A	2,223.2	593.2	1,218.0	1,811.2	412.0
2016/17	2,087.4	412.0	N/A	2,499.4	676.0	1,425.0	2,101.0	398.7
2017/18	2,211.9	398.7	N/A	2,610.6	734.7	1,516.8	2,251.5	359.0
2018/19	2,223.3	359.0	N/A	2,582.3	741.2	1,522.9	2,264.0	318.3
2019/20	2,504.2	318.3	N/A	2,822.5	774.3	1,598.2	2,372.4	450.1
2020/21	3,056.1	450.1	N/A	3,506.2	808.1	2,090.0	2,898.1	608.1
2021/22	2,862.6	608.1	N/A	3,470.8	764.6	1,869.3	2,633.9	836.8
2022/23	2,528.1	836.8	N/A	3,364.9	716.4	1,848.3	2,564.6	800.3
2023/24*	2,548.0	800.3	N/A	3,384.8	760.7	1,962.6	2,723.3	625.0

Source: Almond Board of California. Note: Totals may not add precisely due to rounding. *Estimated.




Almonds' long shelf life means they travel to their destination by cargo ship, producing 50 times less carbon dioxide emissions per kilometer than travel by airplane.

Source: Joseph Poore, et al. Reducing food's environmental impacts through producers and consumers. *Science*. June 2018.



World Destinations

crop years 2018/19–2022/23 | million pounds

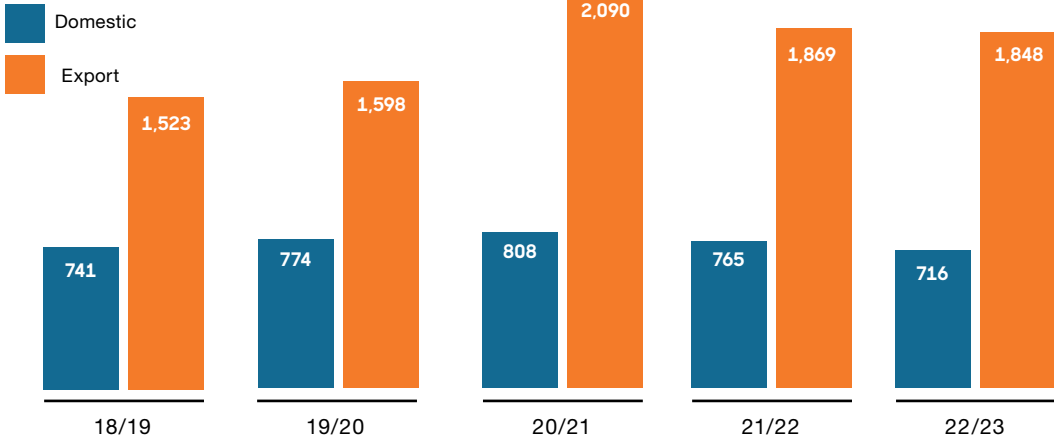
Destination		2018/19	2019/20	2020/21	2021/22	2022/23
Americas						
North America	Canada	60.52	59.59	62.93	62.89	58.13
	Mexico	23.55	24.23	30.21	29.19	30.07
Total North America		84.08	83.85	93.25	92.15	88.26
Latin America/ Caribbean	Argentina	0.35	1.40	3.29	2.33	1.82
	Brazil	2.46	4.97	7.92	4.71	6.61
	Chile	5.40	7.30	11.89	10.67	7.02
	Colombia	3.51	5.17	7.04	7.38	5.82
	Costa Rica	1.08	1.29	1.31	1.44	1.03
	Dominican Republic	0.39	0.27	0.55	0.54	0.76
	Ecuador	0.09	0.13	0.20	0.21	0.73
	Honduras	0.09	0.11	0.24	0.36	0.66
	Peru	1.59	3.20	4.95	2.51	4.94
	Trinidad	0.68	0.60	0.82	0.93	0.72
Total Latin America/Caribbean		16.88	24.97	39.22	31.78	30.93
Total Americas		100.96	108.83	132.47	123.93	119.20
Asia-Pacific						
Northeast Asia	China/Hong Kong	128.09	98.55	162.35	127.30	143.38
	Japan	81.28	84.95	92.02	95.06	87.28
	South Korea	56.92	56.10	76.68	65.41	57.13
	Taiwan	9.34	9.95	13.75	10.79	12.79
Total Northeast Asia		275.63	249.55	344.80	298.57	300.59
Southeast Asia	Indonesia	4.63	4.26	5.38	6.72	5.90
	Malaysia	9.34	8.68	10.42	8.30	7.14
	Philippines	0.56	0.55	1.10	1.34	1.42
	Singapore	3.85	4.14	5.34	4.76	5.28
	Thailand	7.33	8.25	9.46	10.98	12.31
	Vietnam	57.23	14.38	34.02	27.39	27.11
Total Southeast Asia		83.02	40.36	65.77	59.55	59.19
South/Central Asia	Afghanistan	2.27	2.83	2.48	4.51	6.36
	Bangladesh	0.13	0.48	2.92	1.47	1.23
	India	231.35	255.77	362.07	352.67	331.08
	Kazakhstan	7.87	8.92	10.95	5.40	8.20
	Nepal	0.54	0.96	1.80	1.09	1.16
	Pakistan	9.69	10.18	11.44	9.54	6.08
Total South/Central Asia		251.88	279.15	391.80	375.00	354.43
Australasia/Oceania	Australia	5.73	3.32	2.60	2.56	1.16
	New Zealand	3.70	3.93	4.73	2.83	2.87
Total Australasia/Oceania		9.46	7.34	7.34	5.39	4.03
Total Asia-Pacific		620.00	576.39	809.70	738.50	718.24
Europe						
Western Europe	Belgium	24.53	22.32	23.30	23.27	16.21
	Denmark	7.48	7.55	8.61	10.55	8.66
	France	30.02	30.52	34.85	21.90	26.42
	Germany	110.46	133.93	157.11	119.13	114.95
	Greece	11.40	12.16	17.13	12.94	12.16
	Italy	67.06	76.67	96.79	83.60	83.68
	Netherlands	72.19	73.76	93.64	103.55	87.59
	Norway	5.60	7.03	7.03	5.00	4.25
	Portugal	1.99	1.54	1.48	1.31	0.88
	Spain	195.64	192.56	238.94	226.99	193.79
	Sweden	7.20	7.76	6.22	6.32	5.41
	Switzerland	5.01	2.23	1.94	2.69	2.78
	United Kingdom	32.60	34.14	41.47	27.63	26.43
Total Western Europe		572.65	603.43	729.92	646.16	583.82
Central/ Eastern Europe	Armenia	0.09	0.04	0.22	0.18	1.08
	Azerbaijan	0.18	0.13	0.04	0.26	0.57
	Belarus	0.04	0.04	0.18	0.31	0.53
	Bulgaria	2.24	2.88	2.19	2.10	2.74
	Croatia	3.03	4.47	5.70	3.24	3.11
	Czech Republic	1.80	1.89	2.04	1.06	1.49
	Estonia	8.54	12.26	19.41	11.58	14.86
	Georgia	1.38	2.09	2.85	1.93	5.42
	Hungary	0.44	0.44	0.40	0.13	0.57
	Latvia	2.51	1.57	2.12	2.74	1.98
Lithuania	4.79	6.07	9.34	6.36	7.03	
Poland	4.39	3.98	7.34	5.52	6.19	
Romania	0.70	0.48	0.69	0.67	1.51	
Slovakia	-	0.09	0.18	0.04	0.62	
Total Central/E. Europe		35.43	42.50	62.03	40.61	49.69
Total Europe		608.08	645.93	791.95	686.77	633.51
Middle East/Africa						
Middle East	Bahrain	1.69	1.73	1.47	1.33	1.30
	Cyprus	1.22	1.29	1.22	0.97	1.19
	Iraq	1.24	1.22	1.22	1.22	0.67
	Israel	11.53	14.51	15.65	13.02	12.31
	Jordan	11.40	12.62	12.79	14.80	21.57
	Kuwait	4.87	3.36	3.70	3.76	4.21
	Lebanon	7.45	3.96	3.82	3.14	4.82
	Oman	0.15	0.53	0.70	0.49	0.60
	Qatar	2.92	2.21	1.84	1.50	1.62
	Saudi Arabia	20.27	23.15	23.07	19.14	24.82
	Turkey	36.14	61.38	66.70	67.31	77.89
United Arab Emirates	69.01	86.32	122.62	122.58	121.17	
Total Middle East		167.92	212.29	254.80	249.25	272.16
North Africa	Algeria	7.58	9.74	8.48	10.10	15.87
	Egypt	4.08	7.51	8.97	4.16	3.39
	Libya	0.84	2.16	8.79	5.90	12.36
	Morocco	7.12	28.06	65.86	40.21	63.04
Total North Africa		19.96	48.15	93.29	60.62	94.84
Sub-Saharan Africa	South Africa	5.56	6.12	7.45	9.77	10.07
	Total Sub-Saharan Africa	5.93	6.57	7.83	10.22	10.31
Total Middle East/Africa		193.81	267.01	355.92	320.10	377.31
 Total Shipments	Total Export Shipments:	1,522.85	1,598.16	2,090.05	1,869.30	1,848.26
	Total U.S. Shipments:	741.17	774.25	808.08	764.64	716.36
	Total Global Shipments:	2,264.02	2,372.41	2,898.13	2,633.95	2,564.61

Source: Almond Board of California.
Note: Totals may not add precisely due to rounding. Destinations that shipped more than 500,000 pounds in crop year 2022/23 are listed.

Shipments

Domestic + Export Shipments

crop years 2018/19–2022/23 | million pounds

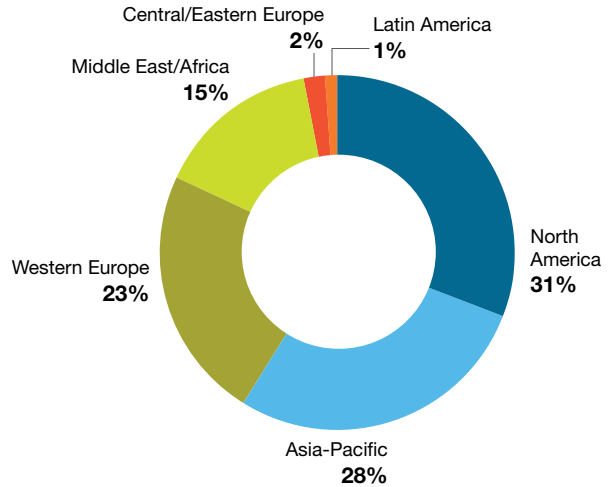


Source: Almond Board of California.

Shipments by Region

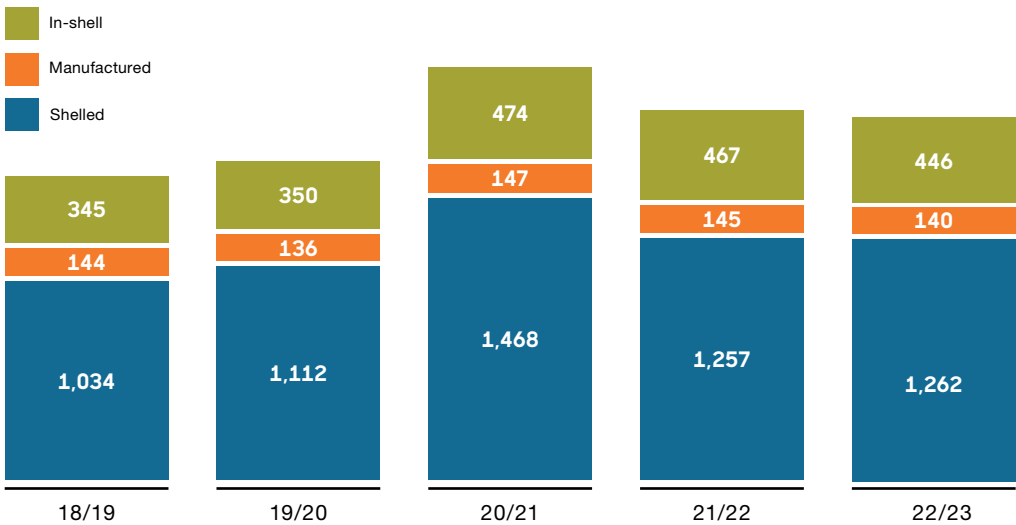
crop year 2022/23

Source: Almond Board of California. Note: Totals may not add precisely due to rounding.



Export Shipments by Product Type

crop years 2018/19–2022/23 | million pounds



Source: Almond Board of California.

Did you know?

California almond farmers reduced the water used to grow each almond by 33% between the 1990s and 2010s¹, with a further 15% reduction over the past 5 years.²

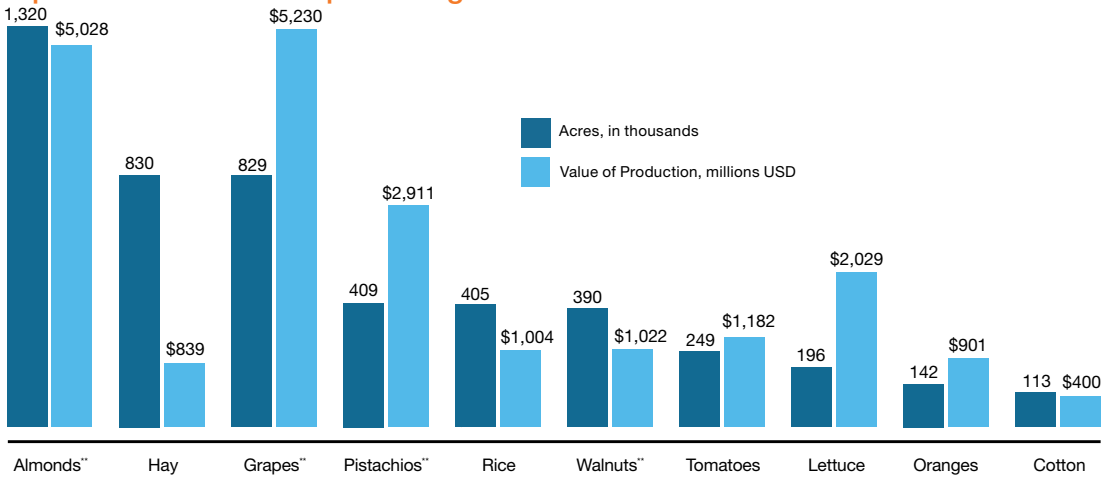
1. University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990-94, 2000-14.

2. SureHarvest. Midpoint Report. November 2022.



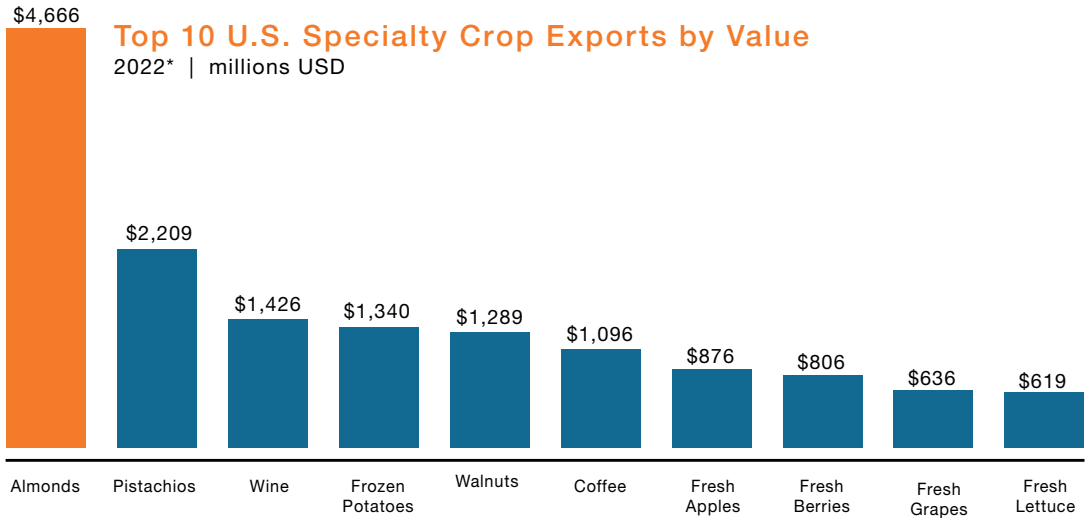
Almonds + Other Crops

Top 10 California Crop Acreage 2021*



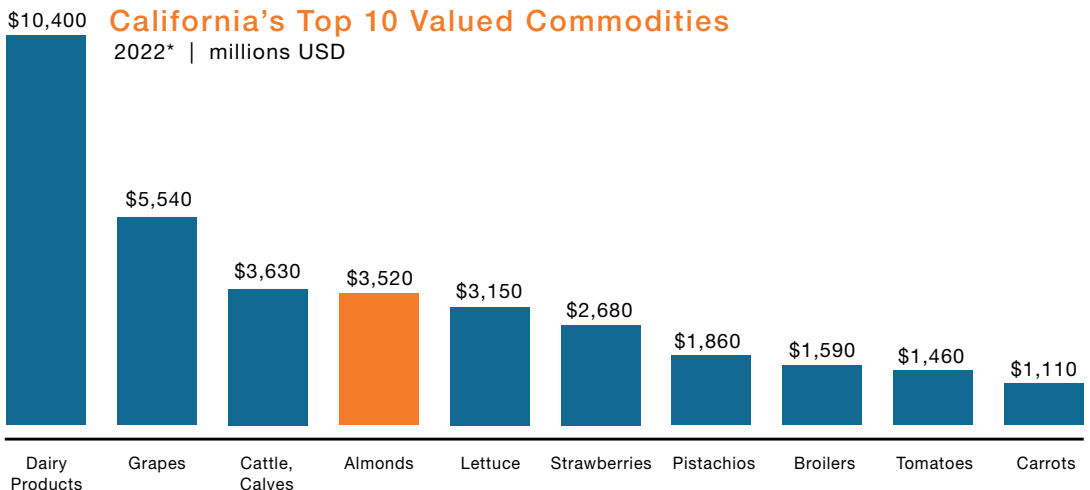
Source: CDFA, California Agricultural Statistics Review. *Calendar year January through December 2021. Value based on farm-gate prices. **Bearing acreage.

Top 10 U.S. Specialty Crop Exports by Value 2022* | millions USD



Source: U.S. Census Bureau Trade Data . *Calendar year January through December 2022.

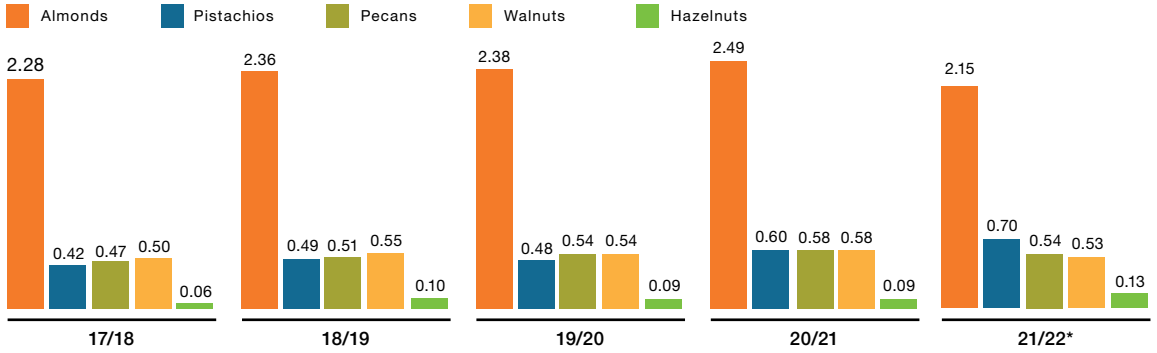
California's Top 10 Valued Commodities 2022* | millions USD



Source: California Department of Food and Ag/Statistics. *Calendar year January through December 2022.

Domestic per Capita Consumption of Tree Nuts

crop years 2017/18–2021/22 | pounds per capita



Source: USDA, Economic Research Service, Fruit & Treenut Situation and Outlook. *Preliminary.

U.S. Production + Imports of Competing Nuts

crop years 2012/13–2021/22 | million pounds (shelled basis)

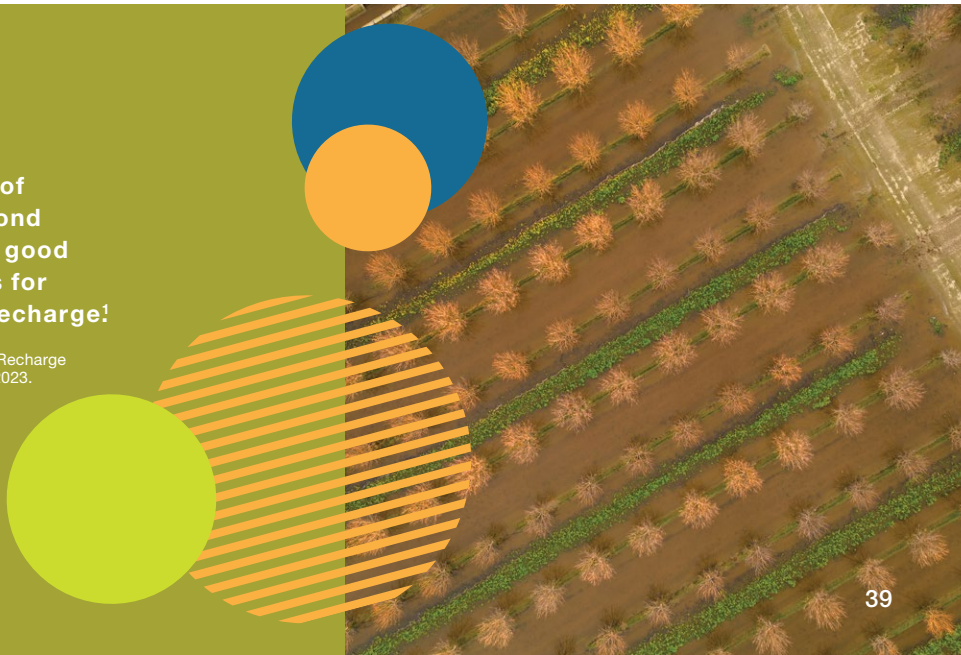
Crop Year	Almonds		Walnuts		Hazelnuts		Pecans		Pistachios		Macadamias		All Tree Nuts	
	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports
2012/13	1,844.0	39.4	442.1	8.4	28.4	15.2	140.8	79.3	278.3	1.2	20.0	18.7	2,753.5	515.6
2013/14	2,009.7	33.9	437.7	11.9	36.9	14.5	130.8	92.5	234.5	0.5	18.6	20.4	2,868.2	582.1
2014/15	1,867.9	31.2	506.1	21.2	26.1	10.9	128.1	104.0	246.3	0.9	20.9	23.4	2,795.4	666.9
2015/16	1,894.4	31.8	527.0	10.8	23.3	9.2	104.5	113.7	134.6	1.2	21.4	27.0	2,705.1	668.1
2016/17	2,135.7	26.6	608.4	15.7	35.1	11.5	127.9	132.6	446.3	1.4	19.1	18.7	3,372.6	697.2
2017/18	2,260.5	32.5	557.1	12.7	25.6	13.8	141.1	137.1	226.9	1.6	22.3	23.5	3,233.5	738.8
2018/19	2,269.6	32.3	601.5	2.6	40.8	16.8	104.5	166.0	487.5	1.3	16.0	30.1	3,518.9	720.2
2019/20	2,551.2	26.3	559.2	2.7	36.0	13.5	134.7	153.8	370.7	1.6	18.5	26.5	3,670.4	755.9
2020/21	3,107.0	21.6	705.2	2.1	49.4	10.6	152.0	137.7	526.6	3.1	18.2	20.1	4,558.3	705.4
2021/22*	2,922.0	22.2	637.0	3.2	62.0	10.3	127.7	121.2	580.0	2.2	23.2	32.2	4,352.8	789.9

Sources: USDA, Economic Research Service, Fruit & Tree Nut Yearbook Tables. Almond crop totals are from Almond Board of California's year-end Position Report. *Preliminary.



930,000 acres of California almond orchards have good soil conditions for groundwater recharge!

1. Land IQ. Groundwater Recharge Suitability Analysis. July 2023.



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Questions? Collateral requests?
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Brought to you by the Almond Board, this podcast explores how industry members are making things work on their operations to drive the industry forward. Find it now wherever you get your podcasts.





Industry Incentives

Technical assistance and grants can aid on-farm efficiency and financial resiliency for almond growers, particularly during difficult economic times.

In past years, almond growers have used a variety of cost-share programs to assist with the adoption of technologies and practices in irrigation, nutrient management, dust reduction, cover crop and pest management projects.

Financial support for almond growers, processors and farm-related businesses is available from a variety of federal, state and local agencies and from non-governmental organizations. Incentive programs are offered for a range of focus areas.

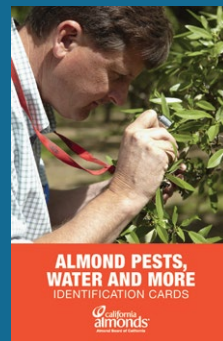
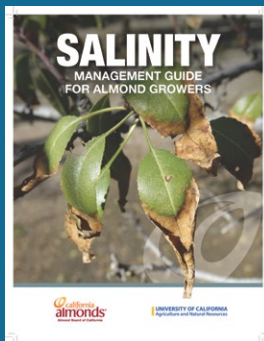
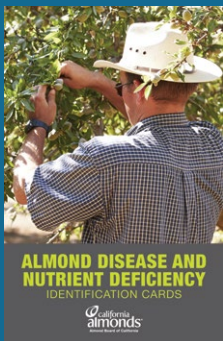
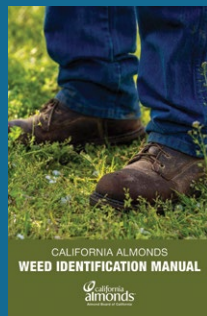
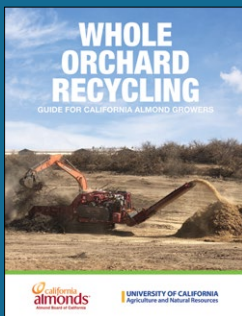
Start your journey today by visiting Almonds.com/Grants



Industry Resources

The Almond Board has a number of free resources available for almond growers and handlers.

Request your materials today.





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