A close-up photograph of an almond tree branch. The branch is covered with vibrant green, serrated leaves that show detailed vein patterns. Several fuzzy, green almonds are attached to the branch, some in sharp focus and others blurred in the background. The lighting is bright, creating a natural and fresh atmosphere.

ALMOND BOARD OF CALIFORNIA // ANNUAL REPORT

ALMOND ALMANAC

20
19

ANNUAL REPORT

WELCOME

The Almond Board of California's Almond Almanac is an annual year-end report that offers a glimpse into what makes up the California almond growing and processing community. The report gives a comprehensive overview of the Almond Board's programs and how we support almond growers and processors in California. This includes the achievements ABC programs have made toward meeting our mission and vision.

The Almond Almanac provides the latest statistics about California almonds. The statistical analyses found in the report are prepared on a crop-year basis, spanning August 1 through July 31, and include both current and historical information about almond production, acreage and varieties, as well as shipment and market 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.

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VISION

California almonds make life better by what we grow and how we grow.

MISSION

Expand global consumption of California almonds through leadership in strategic market development, innovative research and accelerated adoption of industry best practices.



2019
MILESTONES

It was another big year for the Almond Board of California (ABC). Looking at the year in review, these are the programs, achievements and challenges that shaped the California almond industry.



GMA FOOD SAFETY AWARD:

The Almond Board received the Grocery Manufacturers Association (GMA) Food Safety Award from the International Association for Food Protection in recognition of the Board's "preeminence in and contributions to the field of food safety."



FIRST STUDY SHOWS SKIN BENEFITS FROM ALMOND CONSUMPTION:

2019 marked the publication of the first human clinical trial demonstrating the benefits of almond consumption on skin health, showing statistically significant improvements in wrinkle depth and severity, as determined using high resolution facial imaging¹



CASP CELEBRATES 10 YEARS:

The California Almond Sustainability Program, now offering nine modules, launched in 2009 and has grown to a total of 2,375 industry participants, with 22% of California almond acreage assessed.



TWO NEW INDUSTRY NEWSLETTERS:

How We Grow is a print newsletter distributed every other month, focused on the future of the industry and progress toward the 2025 Goals. *In the Orchard*, a weekly e-newsletter, provides timely updates for industry members.



ALMOND ORCHARD 2025 GOALS ROADMAP:

A new publication that outlines the almond community's continuous improvement journey in each of the Almond Orchard 2025 Goal areas.²



\$1 MILLION IN NAVAL ORANGEWORM RESEARCH:

Through the Navel Orangeworm Sterile Insect Technique research project, the Almond Board has ramped up efforts in finding solutions for NOW control.



ALMONDS INCLUDED IN TRADE ASSISTANCE PROGRAM:

ABC and the Almond Alliance of California have worked closely on the developing tariff situation to ensure the voice of the California almond industry is heard. Through their efforts, almonds were included in the Market Facilitation Program and Agricultural Trade Promotion Program.



PETITIONED FOR AN ALMOND EMOJI:

On National Almond Day, the Almond Board led a global campaign to ask almond lovers from around the world to sign a petition to pledge their support for an almond emoji. The petition was submitted to the Unicode Consortium. Stay tuned for the results.

1. See pages 14–15 for detailed information about this study. 2. See pages 4–5 for detailed information on the Almond Orchard 2025 Goals.



In addition to growing a healthy food that people love, the California almond community is dedicated to producing an economically, environmentally and socially responsible crop.

The Almond Orchard 2025 Goals are a tangible example of the California almond community's commitment to continuous improvement.



FURTHER REDUCING THE WATER USED TO GROW ALMONDS

Over the past two decades, almond farmers have successfully reduced the amount of water needed to grow a pound of almonds by 33% via improved production practices and adoption of microirrigation technology! **BY 2025, THE CALIFORNIA ALMOND COMMUNITY COMMITS TO REDUCE THE AMOUNT OF WATER USED TO GROW A POUND OF ALMONDS BY AN ADDITIONAL 20%.**



ACHIEVING ZERO WASTE IN OUR ORCHARDS

Almonds grow in a shell, protected by a hull, on a tree: products traditionally used for livestock bedding, dairy feed and electricity generation. With changing markets for these coproducts, the almond community is spurring innovation for higher value and more sustainable uses, with promising leads in the areas of recycled plastics, fuel and more. **BY 2025, THE CALIFORNIA ALMOND COMMUNITY COMMITS TO ACHIEVE ZERO WASTE IN OUR ORCHARDS BY PUTTING EVERYTHING WE GROW TO OPTIMAL USE.**



INCREASING ADOPTION OF ENVIRONMENTALLY FRIENDLY PEST MANAGEMENT TOOLS

Responsible almond farming requires protecting the crop and trees from bugs, weeds and disease through an integrated pest management approach. This means using tools and techniques like beneficial insects, habitat removal and mating disruption, as well as monitoring pest levels so that pesticides are used only when necessary. To further protect our orchards, employees and communities, **BY 2025, WE COMMIT TO INCREASE ADOPTION OF ENVIRONMENTALLY FRIENDLY PEST MANAGEMENT TOOLS BY 25%.**



IMPROVING LOCAL AIR QUALITY DURING ALMOND HARVEST

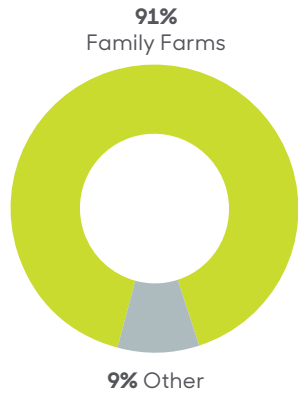
California almonds are harvested by shaking the crop to the ground where it dries naturally inside protective hulls and shells before being swept up and collected, a process that creates dust in our local communities. To address this nuisance, the almond community is taking short- and long-term steps to reimagine how we harvest and, **BY 2025, COMMITS TO REDUCE DUST DURING HARVEST BY 50%.**

INTRODUCING THE ALMOND ORCHARD 2025 GOALS ROADMAP

This new publication outlines the almond community's continuous improvement journey in each of the goal areas, as well as metrics that the industry's progress will be measured against. **AVAILABLE ONLINE AT [ALMONDS.COM/2025GOALS](https://almonds.com/2025goals)**

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

About Our Community

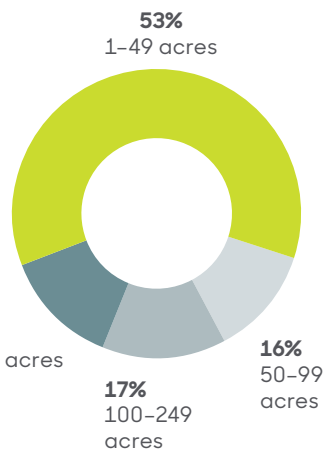


FARMERS

The California almond growing community is driven by **family farmers**.

According to the most recently available USDA Census of Agriculture data, there are around 7,600 almond farms in California. Many 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.

Source: USDA 2012 Census of Agriculture.



ORCHARDS

Nearly **70%** of California almond farms are **100 acres or less**.

Small or large, California's almond farmers take a long-term 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 unprecedented commitment to environmental responsibility.

Source: USDA 2017 Census of Agriculture.

7,600

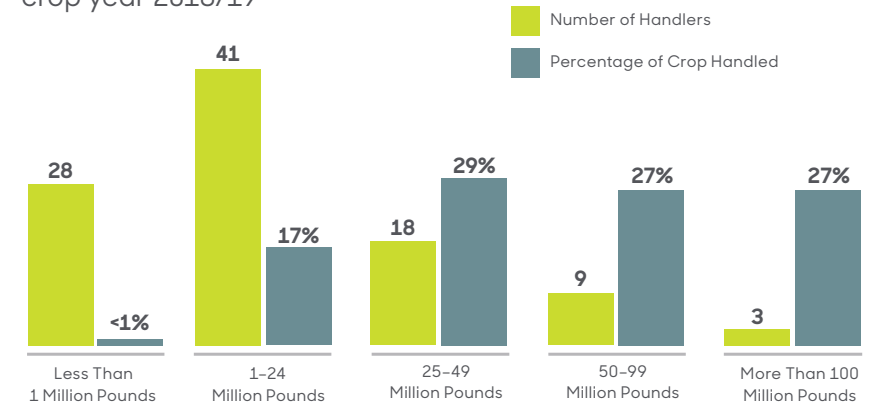
FARMERS produce 80% of the world's supply of almonds.

99

HANDLERS process California almonds. Many are also **family owned and operated**.

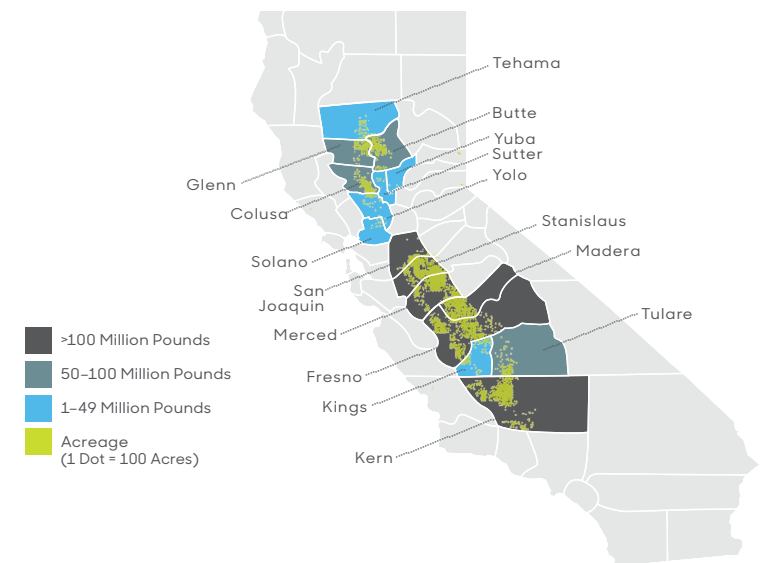
Distribution of Crop by Handler Size

crop year 2018/19



Where Almonds Are Grown

production by county | crop year 2018/19



DESTINATIONS

DOMESTIC

At **33%** share of shipments, the **U.S.** remains the **#1 GLOBAL DESTINATION** for California almonds.

2018/19 domestic shipments marked the **largest in history** at **741 million pounds**.

INTERNATIONAL

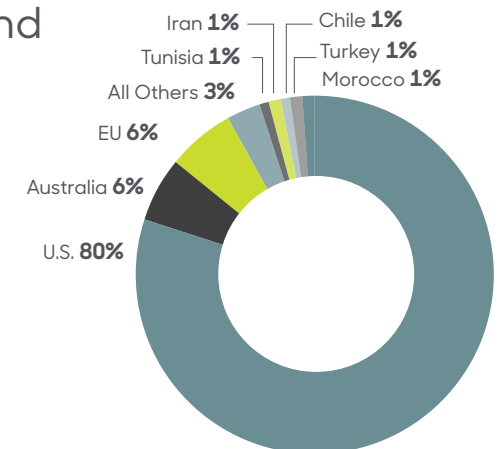
For the first time, **INDIA** WAS THE **TOP EXPORT MARKET**.

2018/19 export shipments went to more than **100 countries**.

The **top ten export markets** represent **70%** of total export shipments.

World Almond Production

crop year 2018/19



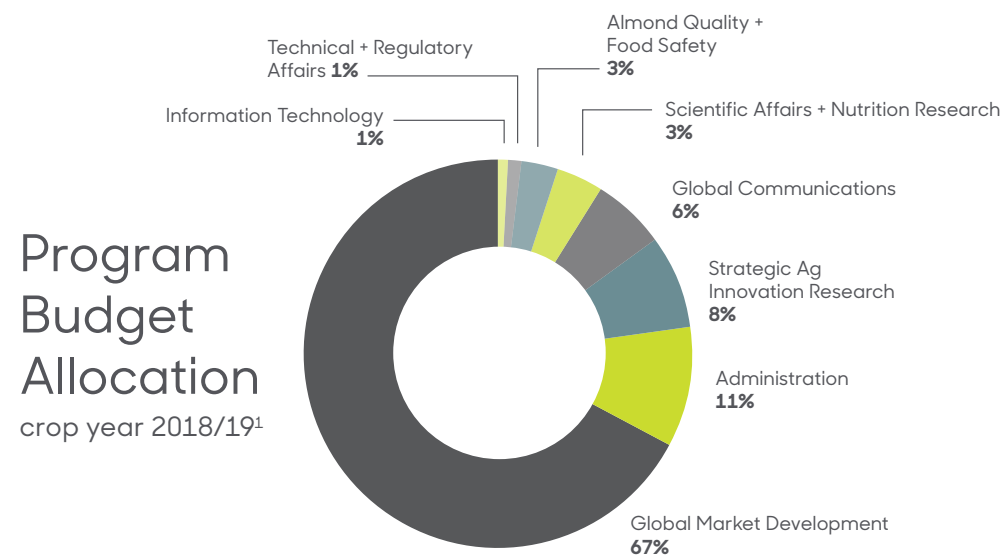
Source: International Nut and Dried Fruit Council.



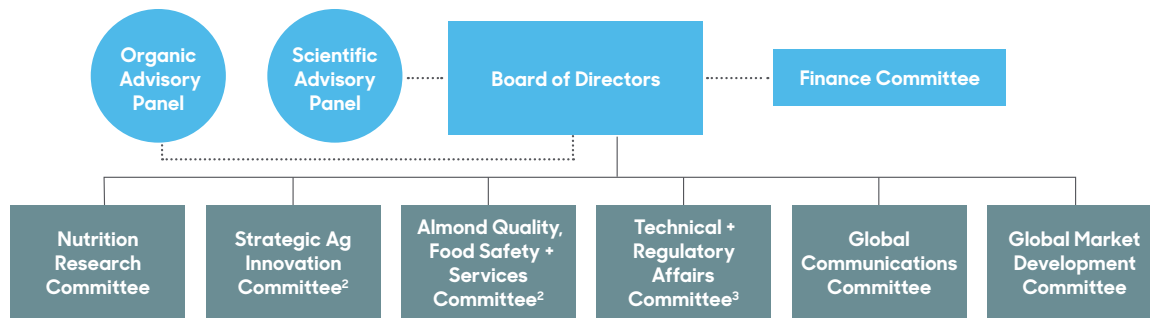
ALMOND BOARD OF CALIFORNIA Programs + Budget

The Almond Board of California's programs are funded by an assessment placed on each pound of almonds grown in California. Each year, the ABC Board of Directors, made up of both growers and handlers, approves the budget allocation for each program area.

ABC programs support growers by developing global market demand for almonds as well as conducting research that helps improve our farming and processing practices. These areas are defined in the Program Budget Allocation chart below and program updates can be found throughout the Almanac.



Committee Structure



1. Totals may not add precisely due to rounding. 2. See pages 9-10 for working groups that support this committee. 3. Ag Regulatory Subcommittee reports to the Technical + Regulatory Affairs Committee.

Innovation Through Research

Rooted in research and founded in fact, the Almond Board of California supports the almond community by investing in independent scientific research.

Since 1973, ABC's research-focused committees have guided the investment of \$89 million to build a foundation of knowledge on almonds' impact on human health, and ensure food quality and safety, farming efficiencies and minimize environmental impacts.

Together, these programs help California almond farmers and processors provide almond lovers around the world with a safe, wholesome and sustainable product.

NUTRITION RESEARCH COMMITTEE

Founded: 1995

Investment to date: \$30.2M

Projects funded: 111

For more about nutrition research, see pages 14-15.

STRATEGIC AG INNOVATION COMMITTEE

Founded: 1973

Investment to date: \$48.5M

Projects funded: 438

For more about agricultural innovation, see pages 10-13.

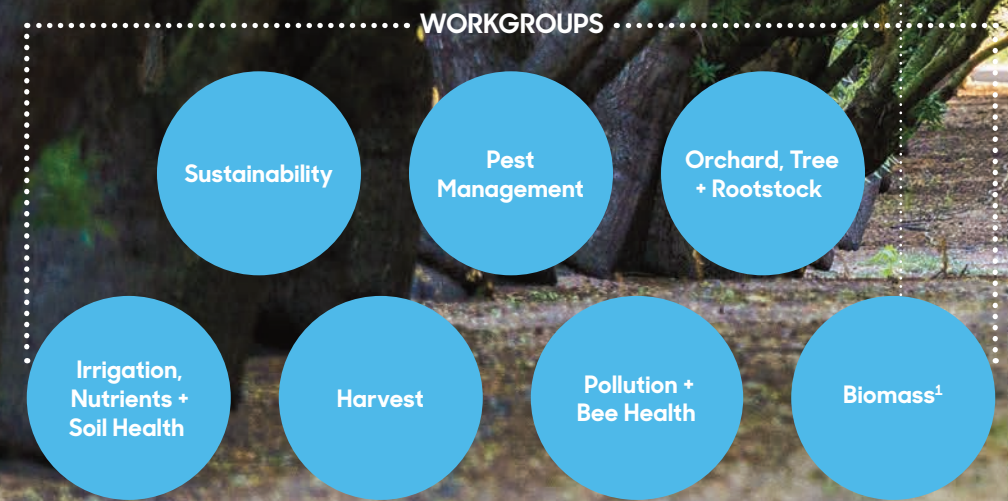
ALMOND QUALITY, FOOD SAFETY + SERVICES COMMITTEE

Founded: 2001

Investment to date: \$10M

Projects funded: 105¹

For more on almond quality and safety, see page 16.



1. Research projects on innovative off-farm uses of almond coproducts are funded by the Almond Quality and Food Safety Committee but overseen by the Strategic Ag Innovation Committee and Biomass Workgroup.

Building the Farm of the Future

California's almond farmers are committed to responsible stewardship of the land for the benefit of our families, communities and everyone who loves to eat almonds. Supporting that commitment is nearly 50 years of investment in research to improve and evolve farming practices while minimizing environmental impacts.

A STRATEGIC APPROACH

Almond Board-funded agricultural and environmental research is directed by the industry for the industry. Guiding this investment in research are seven distinct workgroups, each composed of growers, processors and relevant industry stakeholders. Based on research priorities set by the Strategic Ag Innovation Committee, the workgroups review research proposals and track progress within their respective focus areas.



BIOMASS

Exploring new value-added uses for almond hulls, shells and woody biomass



SUSTAINABILITY

Guiding the California Almond Sustainability Program and multifaceted sustainability research



PEST MANAGEMENT

Considering pest biology to develop new approaches to control insects, weeds and disease



ORCHARD, TREE + ROOTSTOCK

Including orchard configuration, tree training, rootstock and variety breeding



IRRIGATION, NUTRIENTS + SOIL HEALTH

Improving water, fertilizer and soil management to meet orchard needs and reduce impacts



HARVEST

Re-envisioning almond harvest to reduce dust without impacting efficiency



POLLINATION + BEE HEALTH

Supporting honey bee health research and informing bloom-specific practices for optimal yields

Each ABC-funded research project produces a midyear summary, poster and full report, all available at Almonds.com/ResearchDatabase.

Did You Know?

Research findings are shared with farmers and processors via articles, toolkits, videos, events and more. See pages 18-19 for how it happens.

Committed to Honey Bee Health

The decline in honey bee health has been linked to five complex factors, and the California almond industry is working to help address each one.

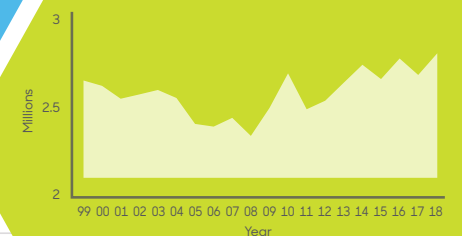


PLANTING POLLINATOR HABITAT

To provide additional food sources for bees before and after almond bloom, some farmers are planting flower pastures near or within almond orchards. Not only do those blooming plants support honey bees, they provide food sources for native bees as well.

Since 2013, almond farmers have planted over 34,000 acres of bee pasture through Project Apis m.'s Seeds for Bees Program.⁴

THE NUMBER OF U.S. HONEY BEE HIVES IS AT A 20-YEAR HIGH³



However, beekeepers still experience significant over-winter losses and must work hard to rebuild healthy apiaries in time for crop pollination.

1. California Almond Sustainability Program. August 2019. 2. Gene Brandt. Vice President. American Beekeeping Federation. 3. USDA-NASS. Honey Production Report. 1999-2018. 4. Billy Synk. Director of Pollination Services. Project Apis m. November 2019. Represents total plantings from 2013-present.

Doing More with Less

California almond farmers are focused on responsible and efficient use of water, a precious and limited resource in California.

NEARLY **80%** of almond orchards use efficient **MICROIRRIGATION**,¹ for **ABOVE THE 42% AVERAGE** for California farms overall.²

SINCE 1982, ABC HAS FUNDED **221** WATER RESEARCH PROJECTS.

ALMOND ORCHARD
2025 GOALS

BY 2025, the almond community commits to reduce the amount of water used to **GROW A POUND OF ALMONDS BY AN ADDITIONAL 20%**

WATER-SAVING TECHNOLOGIES

like microirrigation have helped farmers

REDUCE

the amount of **WATER** it takes to grow **EACH POUND OF ALMONDS BY**

33% OVER THE PAST 20 YEARS.³

ALMOND IRRIGATION IMPROVEMENT CONTINUUM

While almond farmers have made great strides in irrigation efficiency, there's always room for improvement. The Almond Irrigation Improvement Continuum, created by irrigation experts, is a roadmap for California almond farmers to accelerate adoption of research-based water-efficient practices and technology. Collecting and organizing all almond-related irrigation management guidance in one place for the first time, the Continuum is also serving as a model for other crops to improve their water management.

This detailed how-to guide, available at Almonds.com/Irrigation, focuses on five key areas: monitoring irrigation system performance, soil moisture, plant water status, calculating orchard water requirements and measuring applied water. ABC's Field Outreach and Education team works with farmers to implement these precision practices.

Farmers can measure where they stand on the Continuum utilizing the California Almond Sustainability Program's online portal, SustainableAlmondGrowing.org, with more than 500 farms having done so to date.

1. California Almond Sustainability Program. August 2019. 2. California Department of Water Resources. California Water Plan Update 2013: Volume 3, Chapter 2. 3. University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990-94, 2000-14.

Seeking Optimal Uses

Almonds grow in a shell, protected by a hull, on a tree. Traditionally, these coproducts have been used as livestock bedding, dairy feed and transformed into electricity. However, changing markets and increased production have led the almond industry to investigate new, optimized uses.

Guided by ABC's Biomass Workgroup, research is exploring a variety of options that will bring both environmental and economic benefits. While some ideas will take longer to research and develop, others are already well on their way to becoming viable options, with promising leads in the areas of recycled plastics, fuel and more.



WHOLE ORCHARD RECYCLING

MATERIAL: WOODY BIOMASS

At the end of their productive lives, whole almond trees are ground up and incorporated back into the soil. Research has found this practice improves soil health¹ and helps to address climate change. Models show that recycling the orchard sequesters 2.4 tons of carbon per acre,² equivalent to living car-free for a year.³



OPTIMIZED POULTRY FEED

MATERIAL: HULLS

Almonds' sugary, fibrous hulls can feed animals big and small. New research has shown Nonpareil almond hulls are a safe alternative feed ingredient for both broilers and laying hens.⁴ Upcoming research is testing if feeding antioxidant-rich almond hulls can combat a common parasitic disease in broilers and improve egg yolk composition from layers.



SOIL AMENDMENT

MATERIAL: SHELLS

A common practice in broccoli farming, discing under the plant residue after harvest, can release nitrogen that could eventually make its way into underground aquifers. Research using ground almond shells in the soil to immobilize the nitrogen has shown positive results with the added benefit of increasing yields in the subsequently planted crop, like strawberries.⁵

ALMOND ORCHARD
2025 GOALS

BY 2025, the almond community **COMMITTS TO ACHIEVE ZERO WASTE IN OUR ORCHARDS** by putting everything we grow to optimal use.

1. Brent Holtz, et al. Whole almond orchard recycling and the effect on second generation tree growth, yield light interception and soil fertility. VII International Symposium on Almonds and Pistachios. 2017. 2. Michael Wolff, et al. Whole Orchard Recycling report for the Environmental Farming Act Science Advisory Panel. 2019. 3. Seth Wynes, et al. The climate mitigation gap: education and government recommendations miss the most effective individual actions. Environmental Research Letters. 2017. 4. Woo Kyun Kim, et al. Effect of almond hull as an alternative ingredient on broiler performance and nutrient digestibility. Poultry Science Association 108th Annual Meeting. 2019. 5. Joji Muramoto, et al. Mobilizing mineralized nitrogen from cole crop residues using organic amendments. Final report to California Speciality Crop Block Grant Program. 2019.

NUTRITION RESEARCH

Beauty from the Inside Out

Diet as a means of promoting skin health is of growing interest to consumers.

Emerging research, funded by the Almond Board of California and led by Dr. Raja Sivamani, associate professor of dermatology at the University of California, Davis, suggests that regular almond snacking may offer benefits for aging skin.¹ Dr. Sivamani's recently published pilot trial—the first of its kind to examine the impact of almonds on skin—specifically investigated the impact of daily almond snacking on facial wrinkles.

| | |
|----------------------|---|
| PARTICIPANTS: | 28 postmenopausal women with Fitzpatrick skin type 1 or 2 (the skin types most susceptible to sunburn) |
| DESIGN: | The women were randomly assigned to snack on almonds or a nut-free snack for 16 weeks. Based on consumer snacking behavior, these snacks provided 20% of their daily energy, translating to roughly two, one-ounce servings of almonds a day. |
| RESULTS: | Researchers used high-definition photographic imaging to assess facial wrinkle width and severity and found a 10% decrease in wrinkle width and a 9% reduction in wrinkle severity! Measures of skin barrier function were also assessed and were found to remain unchanged. |
| CONCLUSION: | These promising findings suggest that daily almond snacking may play a role in reducing measures of wrinkle width and severity and certainly warrant further research. |
| MORE TO COME: | <p>A larger and longer-term follow-up study is already underway with Dr. Sivamani's research team at UC Davis. The new investigation includes a larger group of postmenopausal women and will extend the study from 16 to 24 weeks. In addition to assessing measures of wrinkle width and severity, the follow-up trial will assess changes in the skin's microbiome. Like the gut, the skin's surface has its own ecology, hosting an abundance of microorganisms. This may be impacted by dietary intake and warrants investigation.</p> <p>Another newly funded study will expand ABC's skin research to include Asian skin types and will investigate the influence of regular almond consumption on skin glow. Healthy Asian-American women aged 35–50 will be recruited to participate in this 12-week study under the direction of Dr. Zhaoping Li at the University of California, Los Angeles. The investigation will assess the impact of daily almond snacking on skin inflammation and aging in addition to radiance (skin "glow"), elasticity, sebum and hydration.</p> |

1. Foolad N, Vaughn AR, Rybak I, Burney WA, Chodur GM, Newman JW, Steinberg FM, Sivamani RK. Prospective randomized controlled pilot study on the effects of almond consumption on skin lipids and wrinkles. *Phytotherapy Research*. 2019;1–6. <https://doi.org/10.1002/ptr.6495>.

1995–present

Commitment to Nutrition + Health Research

> **110** PROJECTS INVESTIGATING ALMONDS AND HEALTH

> **175** PUBLISHED STUDIES



HEART HEALTH:

22 Research Projects
34 Scientific Publications to Date



DIABETES AND METABOLIC SYNDROME:

20 Research Projects
19 Scientific Publications to Date



WEIGHT MANAGEMENT, SATIETY AND GUT HEALTH:

26 Research Projects
45 Scientific Publications to Date



SKIN HEALTH:

2 Research Projects
1 Scientific Publication to Date



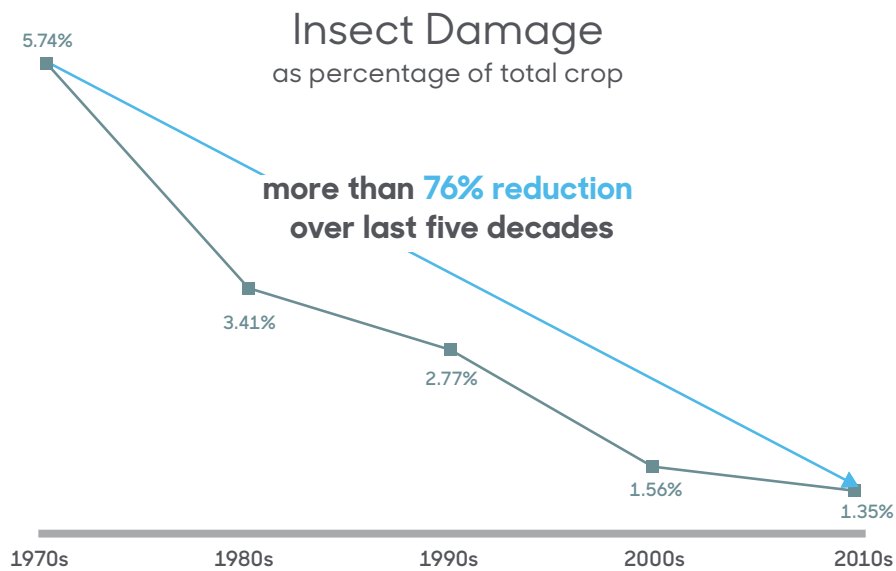
OTHER AREAS OF RESEARCH:

- Cognition
- Gut Microbiome
- Composition and Calorie Count

ALMOND QUALITY + FOOD SAFETY

Long-Term Commitment to Quality

The Almond Board of California's Food Quality and Safety Program is continually evolving to ensure almonds are produced in a safe, responsible manner throughout the food supply chain so consumers around the world can have the highest level of confidence in our product. One way they do this is through the management of insect damage, important for reducing inedible nuts and impacts on farmers' bottom line.



The percentage of inedible almonds has dropped drastically over the decades from an average of 5.74% in the 1970s to 1.35% in the 2010s. A big reason for the reduction is research and industry adoption of winter sanitation, a process where almonds left on the tree after harvest are removed, eliminating habitat for crop-damaging pests.



California Almonds Receive Prestigious Food Safety Award

The International Association for Food Protection selected ABC as the recipient of the 2019 GMA Food Safety Award, sponsored by the Grocery Manufacturers Association, in recognition of long-term contributions in the area of food safety. This award is the result of decades of research and proactive approaches taken by almond growers and handlers to ensure the safety of California almonds. Food safety is a cornerstone of the industry, and ABC will continue to explore ways to protect the integrity of California almonds.

GLOBAL TECHNICAL + REGULATORY AFFAIRS

A Rapidly Changing Global Trade Environment

Shipping to more than 100 countries around the world calls for a dedicated focus on trade issues and strong relationships with key stakeholders to address the variety of import challenges that arise.

Whether it is tariffs, which were increasingly important in 2019, or technical barriers such as aflatoxin controls or labeling requirements, ABC leverages the U.S. government, technical experts and market contacts to address challenges, many of which are not easily resolved and are sometimes hard to define.

In 2019, ABC actively addressed almond-related issues in several key markets.*

- U.S.**
 Commented on FDA standards of identity for plant-based products
 Harmonization of FDA goods return and reconditioning procedures
 Incentives to help growers afford new technologies
- India**
 Retaliatory tariffs on U.S. almonds at 41 rupees per kilogram inshell and 120 rupees per kilogram kernel
 Engaged with Indian government over labeling, Goods and Services Tax (GST)
- China**
 60% retaliatory tariff on U.S. kernel and inshell almonds
 Collaborated with Chinese industry regarding tariff exclusion
 Ongoing effort to achieve market access for pelletized hulls
- EU**
 EU reapplied <1% import controls for almonds under the Pre-Export Check (PEC) program
 Reprocessing options identified as an alternative to rejections
 Phytosanitary certificates requirement instituted
 Coalition focusing on pesticide MRLs
- Japan**
 Limited trade agreement, bringing tariffs on U.S. almonds to 0%
 Strategized with U.S. government to address aflatoxin rejections

* Issues described as of November 2019.



How We Grow

Global Communications is dedicated to providing targeted resources to those involved in growing and processing almonds, as well as helping the public understand what goes into producing them.

The Almond Board’s field outreach, industry relations and communications programs ensure our growers and handlers have what they need to make key decisions to be successful. A core element of our program is leveraging learnings from agricultural research to drive industry best practices related to the Almond Orchard 2025 Goals, using communications to inform, educate and motivate the industry to take action. An additional focus is educating the industry on consumer expectations about how food is grown.

We also share our story with people outside of agriculture. ABC has a sustainability communications program dedicated to educating the public on almonds’ orchard-to-table story, sharing the forward-thinking research and farming practices that continuously improve how almonds are grown, and highlighting key attributes of California’s almond community.

SUSTAINABILITY COMMUNICATIONS

- Advertising
- Public Relations
- Consumer Research

Learn more about this program on page 20.

INDUSTRY COMMUNICATIONS

Newsletters

HOW WE GROW

Printed newsletter that is distributed every other month, focusing on the future of the industry and its advancements toward achieving the Almond Orchard 2025 Goals.



IN THE ORCHARD

Weekly e-Newsletter providing timely and relevant news for growers that’s easy to access on the go, even from the orchard.



Social Media

FACEBOOK: Follow us at Almond Board of California to stay in touch



YOUTUBE: A hub for all Almond Board-produced grower-educational videos: [AlmondBoardofCA](https://www.youtube.com/AlmondBoardofCA)

Resources

- Almond Irrigation Improvement Continuum
- Stockpile Management
- Honey Bee Best Management Practices
- Managing Dust at Harvest



The Global Communications program focuses on our farm-to-table story, spanning from grower field outreach to consumer sustainability communications.

FIELD OUTREACH + EDUCATION

Boots on the Ground

THIS PROGRAM FEATURES

outreach and educational activities designed to share the innovative farming practices that will be required to meet the future needs of the California almond industry, as well as the consumer, the community and the planet. The team includes staff located in the northern and southern Central Valley who are available to meet one-on-one with growers.



ABC Field Outreach team members Tom Devol (left) and Ashley Correia work directly with growers to adopt best practices.

INDUSTRY RELATIONS

Special Events + Programs

THE ALMOND CONFERENCE

The largest gathering of almond community members, ABC’s annual conference is an opportunity to connect with exhibitors and experience the latest almond production practices, research findings and industry and global market trends.



ALMOND LEADERSHIP PROGRAM

A one-year program designed to cultivate and inspire leaders for years to come. The program covers all facets of the California almond industry through seminars, tours, special projects and community service projects.



Workshops

CALIFORNIA ALMOND SUSTAINABILITY PROGRAM (CASP) WORKSHOPS

Established in 2009, CASP educates about responsible farming practices, facilitates continuous improvement and informs research priorities. Today, CASP encompasses nine educational self-assessment modules, two research-based calculators supporting on-farm decision making, and regional workshops featuring expert lectures and peer-to-peer sharing. **Farmers can participate in CASP online at SustainableAlmondGrowing.org.**



NAVIGATING THE WATERS

The Almond Board held its second annual Navigating the Waters event on May 14 at the International Agri Center in Tulare. The event aimed to help growers understand the complex issues surrounding water use in the Central Valley and featured leading experts on critical issues facing California agriculture, including the Sustainable Groundwater Management Act (SGMA), groundwater recharge and other challenges.

NOW SUMMIT

ABC hosted a Navel Orangeworm (NOW) Summit on June 18 at the Modesto Junior College Agricultural Pavilion. The event drew over 150 attendees, which included almond, pistachio and walnut growers, PCAs and others involved in California agriculture. Content included updates on the current state of NOW research, problems that still remain and potential solutions on the horizon.



Did You Know?

Since 2016, participants of ABC’s Almond Leadership Program have raised more than \$150,000 for the California FFA Foundation’s scholarship program.

Telling Our Sustainability Story



A century ago, 30% of Americans lived on farms.
Today, it's less than 2%.

This shift has decreased awareness of agriculture, but recent trends are motivating people to reconnect with their food. In fact, 70% of U.S. consumers surveyed want to learn more about how almonds are grown!

While health and versatility are core to consumers' love of almonds, sharing the responsible practices used to produce them is a key opportunity. The Almond Board's Sustainability Communications program does just that through integration with the global marketing regions as well as communicating directly with key U.S. and California consumers.



CONNECTING FARM TO FORK

While many Californians drive by our orchards as they traverse the state, few have a strong knowledge of what we do on our farms. To bridge this gap, we support local NPR stations, sharing interesting tidbits on air about how California almonds are grown.



Did You Know?

2019 marks year three of *Growing Good*, ABC's annual sustainability publication. Find it online at Almonds.com/GrowingGood.



WANT TO HELP SPREAD THE WORD? FOLLOW @ALMONDBOARD ON TWITTER FOR THE LATEST.

Building Demand Around the World

The Almond Board of California is charged with building consumer demand for California almonds around the world. By conducting a rigorous market analysis, the Global Market Development team identifies and prioritizes markets across the globe that will provide the greatest return on investment to the almond industry. We then develop and execute comprehensive marketing programs, including advertising, influencer partnerships, public relations and trade support to build demand in those markets.



ABC WILL LAUNCH THREE NEW ADVERTISING CAMPAIGNS IN FY19/20

United Kingdom, China and India

NEW PRODUCT INTRODUCTIONS ARE STRONG GLOBALLY

Nearly 11,000 new products with almonds were introduced in 2018. 80% of the new products came from the confectionery, snack, bakery, bar and cereal categories. Almonds also experienced double-digit year-over-year growth in specialty categories such as desserts and ice cream (+10%), dairy (+13%), spreads (+29%) and sports nutrition (+95%)!

ABC LEVERAGED THE FIRST STUDY SHOWING SKIN BENEFITS FROM ALMOND CONSUMPTION

2019 marked the publication of the first human clinical trial demonstrating the benefits of almond consumption on skin health, and the markets are educating health professionals and consumers on the research findings?

CHINA REMAINS AN IMPORTANT MARKET

We see consumer sentiment and almond new product introductions at an all-time high in China. So, while we experienced an uneven trade landscape and reduced shipments in FY 18/19, we see the long-term demand potential in this market.

1. Consumer Sustainability Tracker, Sterling-Rice Group, August 2019.

1. 2018 Global New Product Introductions Report (Innova). 2. Please see pages 14–15 for detailed information about this study.



United States Market Summary

Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 1999
FY 2018/19 Shipments: 741 Million Pounds

U.S. SHIPMENTS HIT A RECORD 741 MILLION POUNDS, ONCE AGAIN MAKING IT THE #1 GLOBAL DESTINATION.

MAKING CALIFORNIA ALMONDS THE GO-TO SNACK

The U.S. marketing program is dedicated to communicating to consumers that when hunger strikes, California almonds are a healthy, natural snack to tide them over until their next meal.



JULIE ERTZ WOMEN'S WORLD CUP PARTNERSHIP: Capitalizing on global buzz surrounding this major sporting event, ABC launched an integrated campaign during the Women's World Cup featuring soccer star Julie Ertz.

SUPER BOWL ONLINE STREAMING: California almond advertising ran during CBS online streaming of Super Bowl LIII.

SUSTAINABILITY STORY: ABC shared the California almond community's commitment to continuous improvement with consumers.

STAY TUNED: Watch for 2020 U.S. marketing efforts during the New Year diet season in January as well as an integrated spokesperson campaign, with Kerri Walsh Jennings, for the 2020 Summer Olympics.



Mexico Market Summary

Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 2018
FY 2018/19 Shipments: 24 Million Pounds

SHIPMENTS TO MEXICO WERE UP 6.2% COMPARED TO FY 2017/18.

BUILDING THE CASE FOR ALMOND SNACKING

Our opportunity in Mexico is to reach urban consumers juggling many priorities with the need to make healthy eating choices. Almonds, a source of satisfying energy to get them through the day, meet this need perfectly.

"iPONTE ALMENDRA!" CAMPAIGN: This integrated advertising, public relations and social media campaign continued to encourage consumers to "ponte almendra"—make it happen with almonds. The campaign launched in 2018, and ABC recently updated the look and feel to further reinforce how almonds are an essential component of taking on all that life has to offer each and every day.



Canada Market Summary

Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 1999
FY 2018/19 Shipments: 61 Million Pounds

CANADA HAS THE HIGHEST PER CAPITA CONSUMPTION OUTSIDE OF THE U.S.

REACHING BUSY CONSUMERS

Similar to our approach in the U.S., the Canada marketing program ensures almonds stand out as the perfect snack by reaching busy consumers wherever they are in their day with the message that almonds are a healthy snack that can tide them over until their next meal.

SPOKESPEOPLE SPREAD THE WORD: The Almond Board partnered with several consumer influencers, including Manon Lapierre (shown right), to showcase how almond snacks help them own their days.





Europe

UK, FRANCE, GERMANY AND ITALY

Market Summary

Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 2008
FY 2018/19 Shipments: 573 Million Pounds¹

ALMONDS CROWNED #1 NUT IN NEW PRODUCT INTRODUCTIONS IN EUROPE FOR FOURTH CONSECUTIVE YEAR.²

MAKING ALMONDS PART OF SNACKING CULTURE

Traditionally, Europe has been an ingredients market for almonds. The fact that Europe was responsible for almost half of all new global product introductions with almonds in 2018 demonstrates that appetite is still strong. Fueling this appetite are consumers who are hungry for snacks that are healthy, natural and sustainable. Our marketing programs show how almonds check all these boxes and more.



UK

ALMONDS: YOUR KIND OF GOOD

VEGAN-ISH, FIT-ISH, HEALTHY-ISH:

The Almond Board capitalized on the popular “ish” trend with our Your Kind of Good public relations campaign. Fronted by a celebrity and social influencers, our campaign showed consumers that almonds are a guaranteed good choice for their “healthy-ish” lifestyle and an uncomplicated way to snack healthy.

NEW ADVERTISING CAMPAIGN LAUNCHING JANUARY 2020:

After conducting extensive UK market research, we will launch a new integrated marketing campaign in early 2020 with a new target audience and strategy. The campaign will provocatively ask consumers, “Do you almond?” and position almonds as a feel-good fuel that helps our target audience achieve their “A” game.



Germany

HARNESSING THE POWER OF CALIFORNIA

HEALTHONISM: Where health meets hedonism. And what better represents this hot trend than the California lifestyle? Our Snack the California Sun campaign harnesses the power of California to position almonds as an energy-giving snack that is both rich and light. The integrated campaign includes TV, print, digital, social and in-store advertising and is supported by public relations activity, including a pop-up beach event that brought a taste of California to German media and influencers.



France

GOOD FOR ME, GOOD FOR THE PLANET

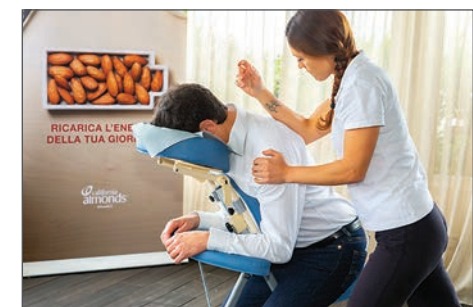
NATURAL AND NUTRITIOUS: French consumers are demanding more from their snacks. Natural and nutritious are important attributes, but they are no longer enough. Sustainability is a critical factor influencing French consumers’ purchasing decisions. ABC’s Nature Does Things Well campaign shares how almonds deliver against both of these requirements. A visit to California’s almond orchards during bloom 2018 brought our sustainability story to life for media and influencers, and social media and public relations helped communicate the health benefits of eating almonds.



Italy

A NATURAL ENERGY BOOST

OUR NEWEST EU MARKET: Healthy snacking is slowly starting to take root in a nation best known for its love of indulgent food. ABC’s Energy to Recharge Your Day campaign positions almonds as a naturally energizing snack that is both healthy and tasty. The integrated campaign, which launched one year ago, features TV, digital and social advertising, and public relations.



1. Shipment number includes total for Western Europe. 2. Innova Market Insights, Global New Product Database, 2019.



India

Market Summary

Reaching: Consumers, Trade

Active Since: 2010

FY 2018/19 Shipments: 231 Million Pounds

SHIPMENTS TO INDIA GREW 16% IN FY 2018/19 AND FOR THE FIRST TIME, INDIA BECAME THE #1 EXPORT MARKET.

LEVERAGING TRADITION IN THE BIGGEST ALMOND EXPORT MARKET

Almond consumption in India is strongly driven by tradition. The India marketing program reinforces these existing traditional uses to increase consumption while also building on the opportunity to grow almond consumption as a snack.



MOM OF CELEBRITY AND NUTRITIONISTS

PANEL DISCUSSION: India has a longstanding relationship with almonds, including generations of mothers giving almonds to their children in the morning. A panel discussion with two leading nutritionists and Dr. Madhu Chopra, mother of global icon Priyanka Chopra, highlighted challenges working women face in ensuring their family's well-being and health.



FAMILY CONSUMPTION CAMPAIGN:

The Almond Board's TV campaign reinforced existing traditions and beliefs to drive daily almond consumption by all family members.



FESTIVE ADVERTISING: Gifting during the Diwali festival is an important part of Indian culture. In our TV advertising campaign, almonds are positioned as a gift of good health, which honors close relationships.

STAY TUNED: ABC will launch a new broadcast advertising campaign to encourage daily consumption of almonds by all family members, focusing on the idea that "success tastes sweetest when it is shared."



China

Market Summary

Reaching: Consumers, Food Professionals

Active Since: 1999

FY 2018/19 Shipments: 128 Million Pounds

USAGE IS UP: ALMONDS HAD A 6% GAIN IN CONSUMPTION AS A SNACK¹

BEAUTY TRENDS DRIVING LONG-TERM GROWTH

China's \$22 billion skincare market will continue to grow as modern Chinese women have more buying power and the rising middle class has more disposable income. Positioning almonds as a beauty food, we encourage consumers to snack on them as part of their daily skincare routine.

FOLLOW THE SUNSHINE: This campaign, now in its third year, aims to educate consumers on the Chinese name for almonds, Badanmu, and their California origin. ABC partnered with eight different retail brands and executed three waves of the advertising campaign.



SHANGHAI FASHION WEEK: To help build the link between almonds and beauty, California almonds partnered with renowned Shanghai fashion designer CJ Yao to develop almond-inspired clothing, including a limited-edition almond bag.



E-COMMERCE: ABC participated in the May 17 Foodie Festival with a focus on linking the benefits of skin beauty and eating almonds. A total of five brands joined ABC in the festival organized by Taobao, the largest online platform in China.



TRADE AND MEDIA IN THE ORCHARD: Trade and media tours were held in March and May to build relationships between attendees and the California almond industry and to educate the Chinese trade about California almonds. Eleven traders, five retail brand owners and others visited California for the tour.



NEW CAMPAIGN LAUNCHING IN FY 2019/20: The China program will launch a new consumer advertising campaign called "Eat Beautiful," focusing on skin beauty.

1. 2018 Global Perceptions Study, Sterling-Rice Group.

South Korea

Market Summary

Reaching: Consumers, Trade
 Active since: 2011
 FY 2018/19 Shipments: 57 Million Pounds

SHIPMENTS TO SOUTH KOREA GREW 12% IN FY 2018/19, HITTING A RECORD 57 MILLION POUNDS.

ALMONDS, YOUR BEAUTY SECRET

The Almond Board's marketing program is focused on strengthening the concept of almonds as a beauty snack by accentuating its beauty and weight-management benefits via the Beauty Secret campaign.



COLLABORATION: South Korean K-beauty YouTubers and social influencers developed short films and Instagram content to deliver educational information about the beauty benefits of almonds.

TRADE FOCUS IN FY 2019/20: The South Korean program will maintain the Beauty Secret campaign and focus more attention on trade education by hosting a seminar to share insights from our consumer research and almond new product research.

Japan

Market Summary

Reaching: Consumers, Trade
 Program Relaunch: 2018
 FY 2018/19 Shipments: 81 Million Pounds

RECORD YEAR: SHIPMENTS TO JAPAN WERE UP 3% COMPARED TO FY 2017/18.

E NE! ALMONDS

Focus has been on strengthening relationships with manufacturers and suppliers and communicating the health and beauty benefits of almonds to consumers. Using media relations and social media, the Japan marketing program's campaign reinforces the vitamin E benefits of almonds.



HAPPY ALMOND DAY: ABC officially registered January 23 as Almond Day in Japan to promote eating 23 almonds a day for a healthy and beautiful life. ABC executed public relations activities to promote this new special day and to share the health and beauty benefits of almonds. Activities included a pop-up California Almond Café, which offered special almond-inspired menu items. The event was targeted to consumers, media, influencers and trade.

FY 2019/20 TARGET EXPANSION: Japan's marketing program will focus on expanding the female consumer target audience to reach more women with our new beauty message, "A Beautiful Life with Almonds."

Trade Marketing + Stewardship

Program Summary

Reaching: Food Professionals
 Active Since: 2012

ALMONDS HAVE BEEN THE #1 NUT IN NEW PRODUCT INTRODUCTIONS FOR THE LAST DECADE AND INTRODUCTIONS HAVE GROWN BY OVER 600% IN TEN YEARS.

CONTINUED DEMAND FOR PLANT-BASED FOODS:

For the past decade, almonds have been the #1 nut in global new product introductions. Today, more and more consumers are choosing a plant-based diet and brands are reacting. The average annual growth rate for food and beverages with plant-based claims is up 60% globally (2014–2018)! This trend has played out with almond new product introductions in less traditional categories such as produce, yogurt and juice beverages.



ALMOND ORCHARD 2025 GOALS: In 2019, ABC conducted proactive outreach to the food industry to communicate the almond industry's continued progress in sustainability and proudly announced the launch of the Almond Orchard 2025 Goals. This initiative generated interest from food professionals around the globe and garnered positive coverage from trade media.

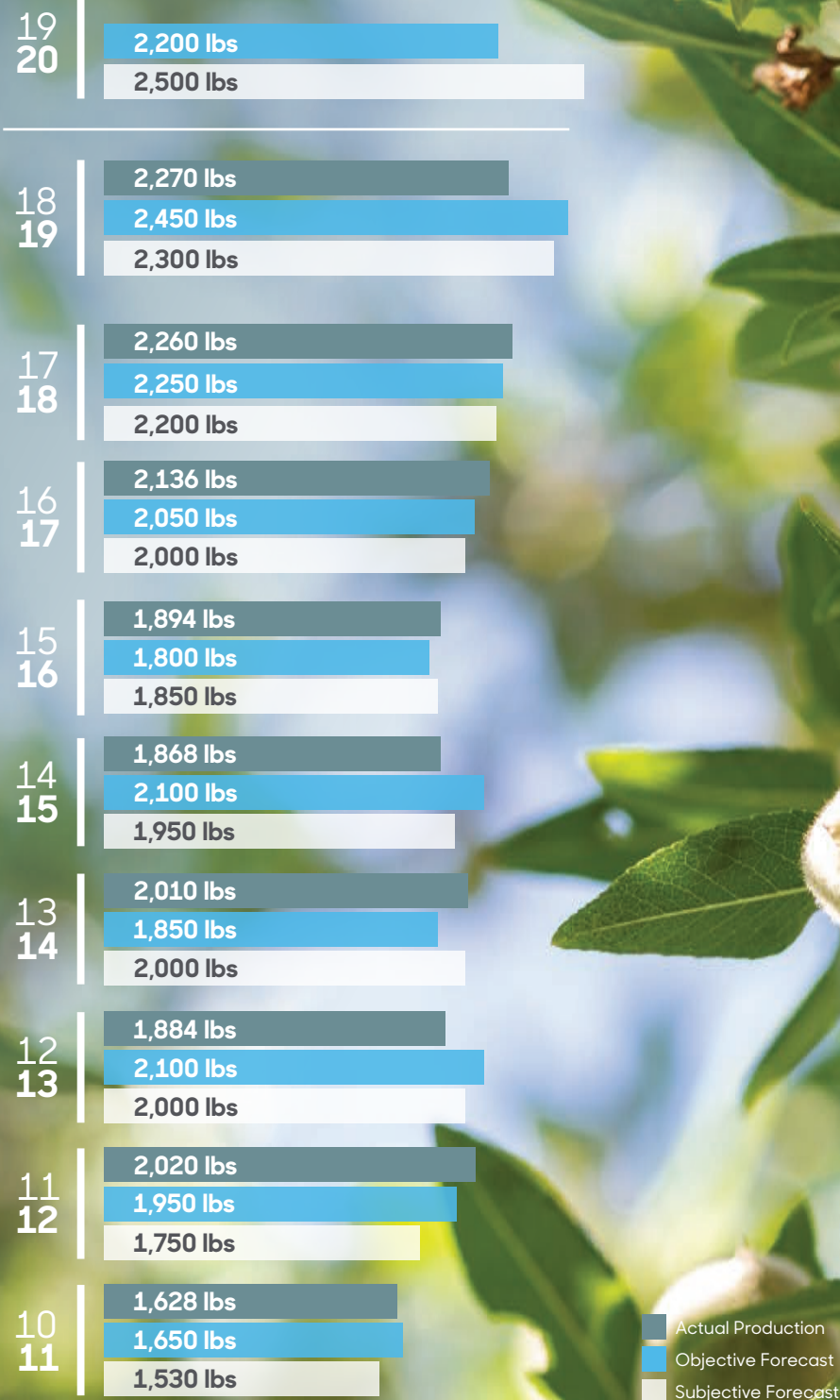
2020 ORCHARD TOUR: Large snack manufacturers around the world want to know more about the California almond industry's sustainability story. In FY 2019/20 the trade program will bring a small group of sustainability officers from these companies to California for an opportunity to see sustainability efforts in action and to meet with ABC's research partners.



1. Top 10 Trends 2019: Trend 2: The Plant Kingdom, Innova Market Insights, June 2019.

crop years 2010/11–2019/20 | million pounds

California Almond Forecasts vs. Actual Production



Source: Almond Board of California, USDA-NASS California Field Office.

California Almond Crop Estimates vs. Actual Receipts

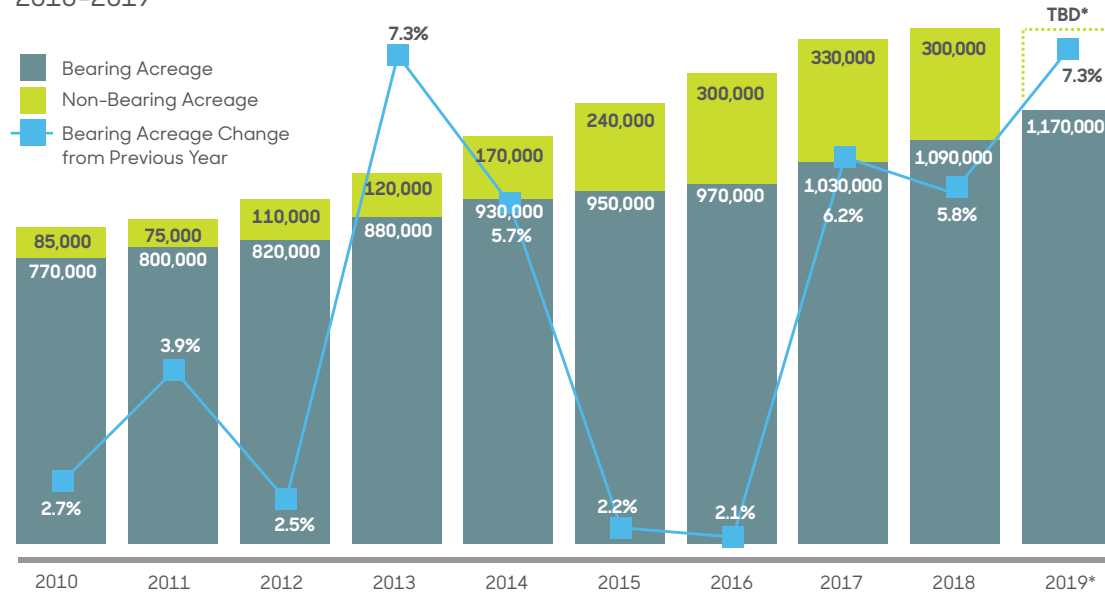
crop years 2000/01–2019/20 | million pounds

| CROP YEAR | OBJECTIVE FORECAST | HANDLER RECEIPTS | LOSS AND EXEMPT | REDETERMINED MARKETABLE WEIGHT | LBS. REJECTS IN RECEIPTS |
|-----------|--------------------|------------------|-------------------|--------------------------------|--------------------------|
| 2000/01 | 640.0 | 698.4 | 26.0 | 672.4 | 15.7 |
| 2001/02 | 850.0 | 824.1 | 29.3 | 794.8 | 16.7 |
| 2002/03 | 980.0 | 1,083.7 | 20.2 | 1,063.5 | 8.2 |
| 2003/04 | 1,000.0 | 1,032.9 | 21.8 | 1,011.1 | 19.8 |
| 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 | 2,087.5 | 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 | * | 44.0 [†] | 2,156.0 | * |

Source: Almond Board of California. Objective forecast provided by USDA, NASS California Field Office. Totals may not add precisely due to rounding. *Not available at time of publication. [†]Estimated.

California Almond Acreage

2010-2019



Source: USDA, NASS/PRO 2018 Acreage Report. *Estimate; non-bearing acreage for 2019 available in April 2020.

California Almond Acreage + Farm Value

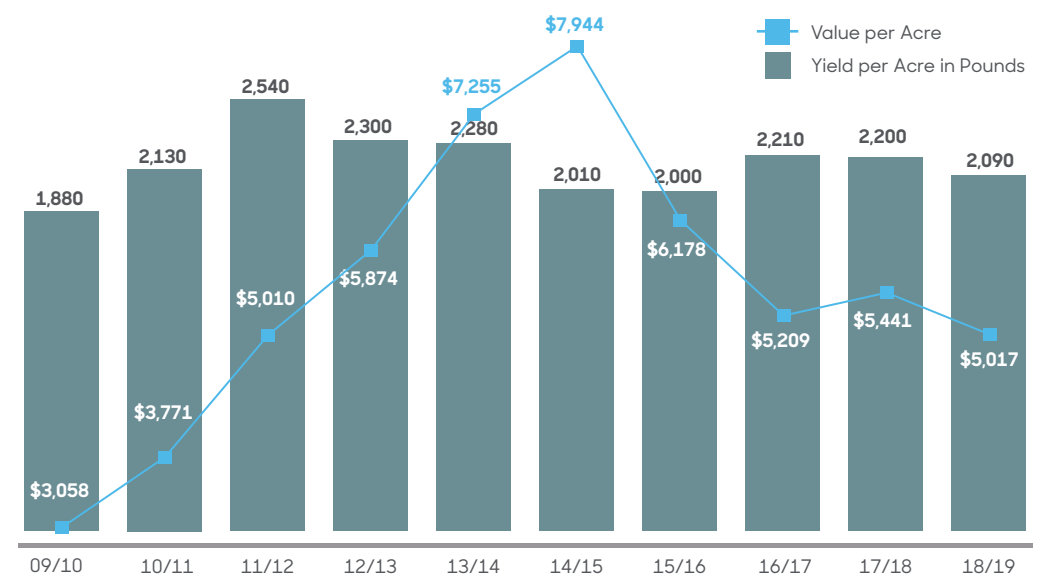
crop years 2010/11-2019/20

| CROP YEAR | ACREAGE | | | | AVERAGE TREES PER ACRE | YIELD | | VALUE IN DOLLARS | | |
|-----------|-----------|-------------|-----------|---------------|------------------------|---------------------------|----------------------------|------------------|----------------------|------------------------|
| | BEARING | NON-BEARING | TOTAL | NEW PLANTINGS | | BEARING ACRE YIELD (LBS.) | PRODUCTION* (MILLION LBS.) | FARM PRICE | FARM VALUE (\$1,000) | VALUE PER BEARING ACRE |
| 2010/11 | 770,000 | 85,000 | 855,000 | 27,448 | 108 | 2,130 | 1,628 | \$1.79 | \$2,903,380 | \$3,771 |
| 2011/12 | 800,000 | 75,000 | 875,000 | 30,606 | 111 | 2,540 | 2,020 | \$1.99 | \$4,007,860 | \$5,010 |
| 2012/13 | 820,000 | 110,000 | 930,000 | 26,994 | 112 | 2,300 | 1,884 | \$2.58 | \$4,816,860 | \$5,874 |
| 2013/14 | 880,000 | 120,000 | 1,000,000 | 29,308 | 112 | 2,280 | 2,010 | \$3.21 | \$6,384,690 | \$7,255 |
| 2014/15 | 930,000 | 170,000 | 1,100,000 | 34,062 | 114 | 2,010 | 1,868 | \$4.00 | \$7,388,000 | \$7,944 |
| 2015/16 | 950,000 | 240,000 | 1,190,000 | 39,564 | 114 | 2,000 | 1,894 | \$3.13 | \$5,868,750 | \$6,178 |
| 2016/17 | 970,000 | 300,000 | 1,270,000 | 33,732 | 116 | 2,210 | 2,136 | \$2.39 | \$5,052,460 | \$5,209 |
| 2017/18 | 1,030,000 | 330,000 | 1,360,000 | 30,620 | 117 | 2,200 | 2,260 | \$2.53 | \$5,603,950 | \$5,441 |
| 2018/19 | 1,090,000 | 300,000 | 1,390,000 | 20,644 | 119 | 2,090 | 2,270 | \$2.44 | \$5,468,040 | \$5,017 |
| 2019/20† | 1,170,000 | ‡ | ‡ | ‡ | 122 | 1,880 | 2,200 | \$ | \$ | \$ |

Source: USDA, NASS/PRO. Note: Almond Board does not track prices. *Production numbers provided by Almond Board of California. †Estimated as of July 3, 2019. ‡Acreage statistics will be available in April 2020. §Value statistics will be available in July 2020.

Crop Value + Yield per Bearing Acre

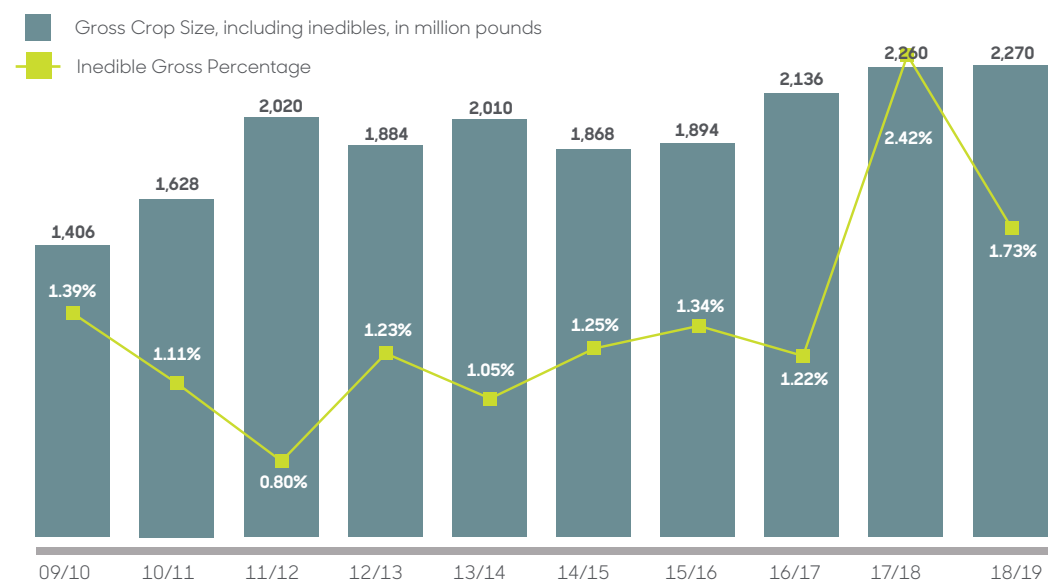
crop years 2009/10-2018/19



Source: USDA, NASS 2019 California Almond Objective Forecast

California Almond Crop-Size History + Inedible Percentage

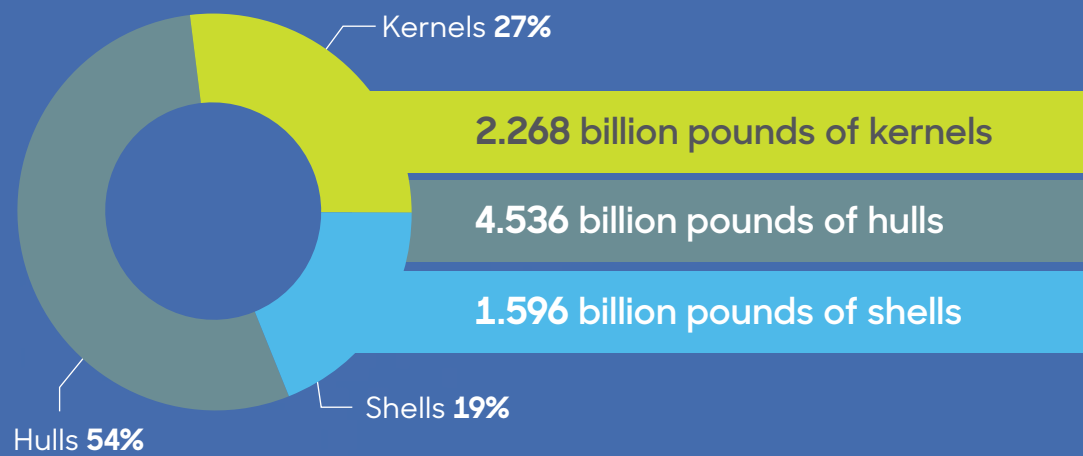
crop years 2009/10-2018/19



Source: Almond Board of California.

Almond Tree Fruit Weight

crop year 2018/19



Did You Know?

The California almond industry generates **104,000 jobs** across California and contributes **\$11 billion** to the state's GDP.

Sources: Kernel Weight—USDA Incomings received by Almond Board of California. Shell and Hull Estimations—Almond Alliance of California, August 2018. University of California, Agricultural Issues Center. The Economic Impact of the California Almond Industry, December 2014.

California Almond Production by County

crop years 2009/10–2018/19 | million pounds

| | GROWING REGIONS | | | | | | | | | | | | | | | | TOTAL |
|---------|-----------------|--------|-------|--------|--------|--------|------|---------|-------------|------------|----------|-------|-------|--------|--------|------------|---------|
| | NORTHERN | | | | | | | CENTRAL | | | SOUTHERN | | | | | | |
| | BUTTE | COLUSA | GLENN | SOLANO | SUTTER | TEHAMA | YOLO | MERCED | SAN JOAQUIN | STANISLAUS | FRESNO | KERN | KINGS | MADERA | TULARE | ALL OTHERS | |
| 2009/10 | 49.2 | 75.7 | 52.7 | 3.7 | 5.2 | 10.9 | 12.4 | 156.7 | 70.7 | 198.8 | 281.9 | 317.9 | 20.6 | 112.3 | 32.6 | 1.2 | 1,402.6 |
| 2010/11 | 47.1 | 83.2 | 55.8 | 4.4 | 4.9 | 11.7 | 13.6 | 164.2 | 68.0 | 202.5 | 344.2 | 403.5 | 29.9 | 149.7 | 42.2 | 1.6 | 1,626.6 |
| 2011/12 | 49.0 | 85.5 | 59.7 | 5.1 | 6.9 | 11.9 | 17.9 | 216.7 | 87.9 | 269.7 | 443.0 | 472.6 | 39.0 | 206.1 | 44.5 | 1.6 | 2,017.2 |
| 2012/13 | 50.9 | 85.1 | 57.9 | 5.4 | 7.0 | 12.5 | 18.1 | 201.4 | 91.5 | 261.8 | 413.6 | 393.4 | 30.7 | 203.5 | 49.1 | 2.1 | 1,884.1 |
| 2013/14 | 56.0 | 103.6 | 69.7 | 6.0 | 7.3 | 14.7 | 22.5 | 213.8 | 95.9 | 284.9 | 398.1 | 427.2 | 32.6 | 216.9 | 55.8 | 1.9 | 2,006.9 |
| 2014/15 | 55.2 | 90.2 | 58.7 | 5.1 | 7.7 | 13.3 | 18.1 | 198.2 | 94.3 | 274.4 | 370.5 | 390.3 | 31.9 | 202.9 | 57.0 | 1.9 | 1,869.7 |
| 2015/16 | 57.4 | 109.7 | 75.4 | 6.0 | 7.4 | 16.0 | 27.3 | 188.7 | 97.2 | 260.7 | 376.5 | 366.1 | 32.4 | 215.2 | 53.9 | 2.3 | 1,892.1 |
| 2016/17 | 54.3 | 104.0 | 68.9 | 6.2 | 8.3 | 17.4 | 28.0 | 222.3 | 104.9 | 291.0 | 433.2 | 433.2 | 40.2 | 242.6 | 73.9 | 2.2 | 2,130.6 |
| 2017/18 | 52.1 | 112.9 | 72.6 | 8.4 | 8.7 | 18.6 | 39.7 | 223.7 | 108.7 | 303.2 | 494.4 | 429.5 | 43.6 | 264.0 | 80.9 | 2.4 | 2,263.7 |
| 2018/19 | 57.1 | 96.8 | 69.4 | 11.3 | 9.0 | 16.2 | 39.4 | 235.1 | 135.5 | 341.9 | 462.4 | 398.2 | 48.5 | 261.4 | 81.1 | 4.7 | 2,268.1 |

Source: USDA Form FV193, Report of Inedible Content of Almond Receipts. Totals may not add precisely due to rounding.

California Almond Receipts by County + Variety

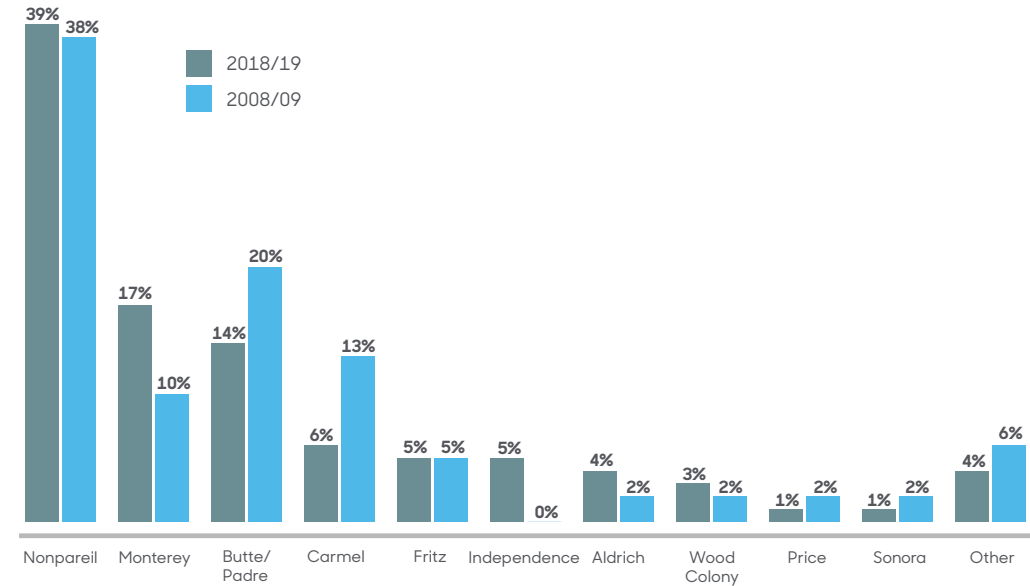
crop year 2018/19 | in pounds

| COUNTIES | % CROP | NONPAREIL | BUTTE/PADRE | MONTEREY | CARMEL | FRITZ | INDEPENDENCE | ALL OTHERS | ALL VARIETIES |
|--------------------|---------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|----------------------|
| NORTHERN | | | | | | | | | |
| BUTTE | 2.5% | 26,785,827 | 6,147,883 | 3,343,223 | 4,301,393 | 651,268 | 456,934 | 15,375,901 | 57,062,429 |
| COLUSA | 4.3% | 43,429,846 | 13,943,654 | 13,653,698 | 8,117,156 | 6,148,194 | 1,142,315 | 10,357,748 | 96,792,611 |
| GLENN | 3.1% | 35,706,386 | 9,180,052 | 4,445,078 | 6,625,010 | 897,702 | 106,449 | 12,456,394 | 69,417,071 |
| SOLANO | 0.5% | 4,223,014 | 1,287,243 | 1,042,262 | 511,587 | 0 | 2,699,687 | 1,491,230 | 11,255,023 |
| SUTTER | 0.4% | 3,152,561 | 1,542,573 | 1,199,692 | 530,853 | 24,929 | 410,543 | 2,130,911 | 8,992,062 |
| TEHAMA | 0.7% | 8,467,042 | 2,463,762 | 853,076 | 1,723,005 | 0 | 32,703 | 2,689,667 | 16,229,255 |
| YOLO | 1.7% | 17,707,044 | 4,837,772 | 6,295,884 | 2,169,046 | 780,054 | 1,741,921 | 5,900,089 | 39,431,810 |
| YUBA | 0.1% | 514,678 | 18,401 | 89,040 | 71,633 | 25,107 | 363,421 | 262,460 | 1,344,740 |
| OTHERS | 0.1% | 721,540 | 85,673 | 85,414 | 109,357 | 32,477 | 227,174 | 274,635 | 1,536,270 |
| TOTAL | 13.3% | 140,707,938 | 39,507,013 | 31,007,367 | 24,159,040 | 8,559,731 | 7,181,147 | 50,939,035 | 302,061,271 |
| CENTRAL | | | | | | | | | |
| MERCED | 10.4% | 93,441,841 | 30,904,110 | 31,163,990 | 17,867,125 | 10,966,024 | 13,383,487 | 37,401,743 | 235,128,320 |
| SAN JOAQUIN | 6.0% | 52,924,352 | 15,336,702 | 6,659,009 | 15,862,942 | 5,908,248 | 17,350,468 | 21,502,157 | 135,543,878 |
| STANISLAUS | 15.1% | 130,740,637 | 43,247,026 | 29,058,182 | 37,259,032 | 14,205,214 | 27,145,274 | 60,266,140 | 341,921,505 |
| OTHERS | 0.0% | 231,801 | 0 | 54,084 | 53,076 | 18,978 | 469,946 | 43,373 | 871,258 |
| TOTAL | 31.5% | 277,338,631 | 89,487,838 | 66,935,265 | 71,042,175 | 31,098,464 | 58,349,175 | 119,213,413 | 713,464,961 |
| SOUTHERN | | | | | | | | | |
| FRESNO | 20.4% | 169,214,904 | 77,847,266 | 105,057,709 | 10,050,058 | 19,580,551 | 19,046,477 | 61,577,274 | 462,374,239 |
| KERN | 17.6% | 149,438,410 | 60,356,276 | 104,165,589 | 8,512,906 | 36,554,210 | 7,564,549 | 31,623,732 | 398,215,672 |
| KINGS | 2.1% | 15,653,136 | 9,383,436 | 11,853,212 | 667,717 | 2,237,661 | 4,523,851 | 4,171,761 | 48,490,774 |
| MADERA | 11.5% | 105,226,508 | 34,802,907 | 58,096,427 | 11,385,513 | 11,887,155 | 4,802,483 | 35,182,263 | 261,383,256 |
| TULARE | 3.6% | 32,450,459 | 7,849,391 | 19,466,678 | 976,813 | 5,789,710 | 8,346,323 | 6,270,264 | 81,149,638 |
| OTHERS | 0.0% | 488,754 | 8,252 | 218,559 | 44,451 | 71,408 | 63,406 | 59,094 | 953,924 |
| TOTAL | 55.2% | 472,472,171 | 190,247,528 | 298,858,174 | 31,637,458 | 76,120,695 | 44,347,089 | 138,884,388 | 1,252,567,503 |
| GRAND TOTAL | 100.0% | 890,518,740 | 319,242,379 | 396,800,806 | 126,838,673 | 115,778,890 | 109,877,411 | 309,036,836 | 2,268,093,735 |

Source: USDA Form FV193, Report of Inedible Content of Almond Receipts.
Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre.

Top Ten Almond-Producing Varieties

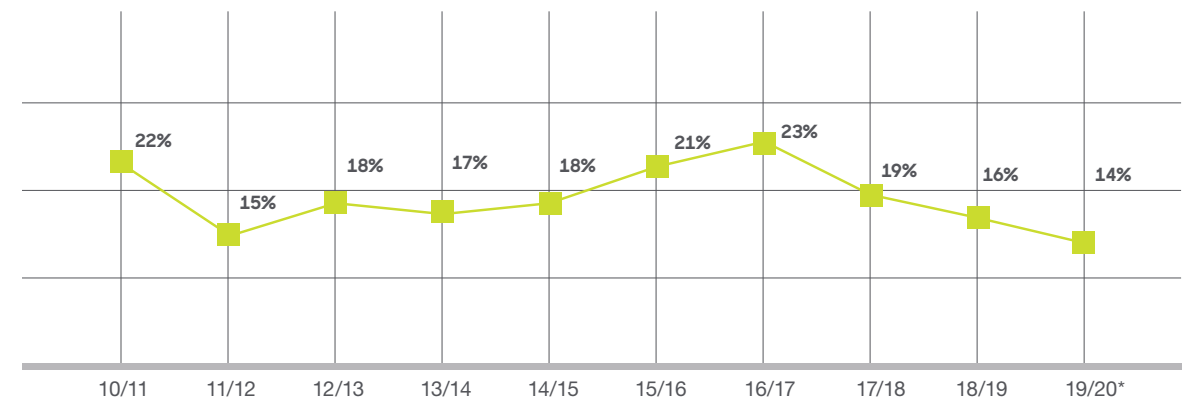
crop years 2008/09 vs. 2018/19



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 2010/11–2019/20



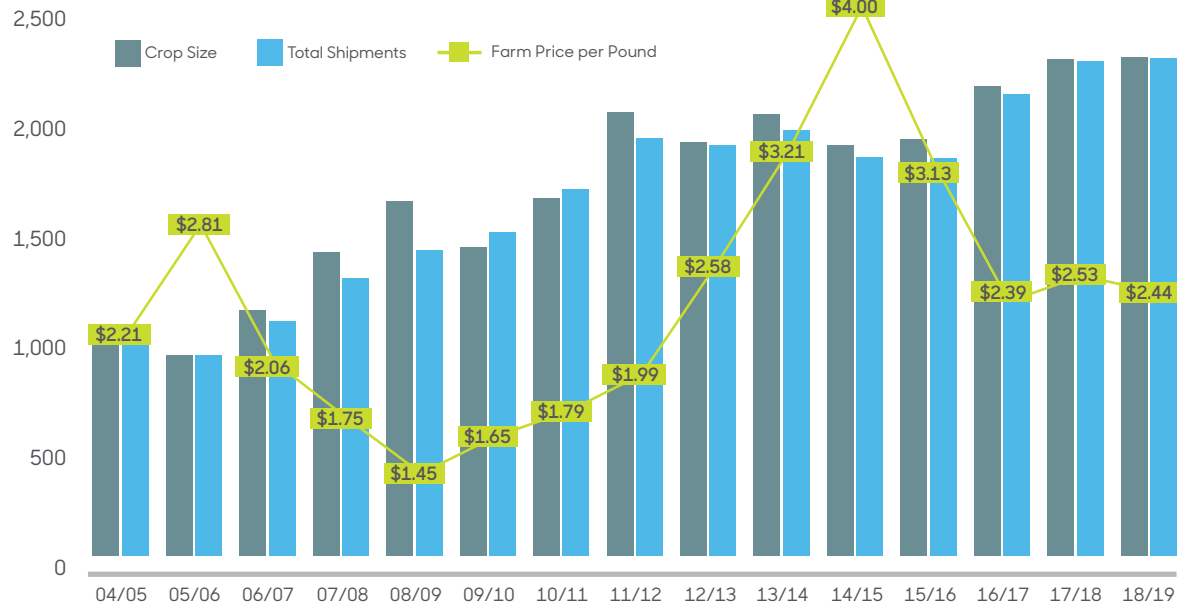
Source: Almond Board of California. *Forecasted.

Did You Know?

California's Central Valley is one of the few places in the world—and only place in the U.S.—with an ideal almond-growing climate.

Historical Crop Size + Shipments vs. Farm Price

crop years 2004/05–2018/19 | million pounds



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

Position Report of California Almonds

crop years 2010/11–2019/20 | million pounds

| CROP YEAR | REDETERMINED MARKETABLE WEIGHT | CARRY-IN | RESERVE | TOTAL SALABLE SUPPLY | DOMESTIC SHIPMENTS | EXPORT SHIPMENTS | TOTAL SHIPMENTS | SALABLE CARRYOVER |
|-----------|--------------------------------|----------|---------|----------------------|--------------------|------------------|-----------------|-------------------|
| 2010/11 | 1,600.3 | 321.3 | N/A | 1,921.6 | 489.7 | 1,177.9 | 1,667.6 | 254.0 |
| 2011/12 | 1,979.9 | 254.0 | N/A | 2,233.9 | 546.7 | 1,351.9 | 1,898.6 | 335.2 |
| 2012/13 | 1,848.4 | 335.2 | N/A | 2,183.6 | 588.4 | 1,278.0 | 1,866.5 | 317.2 |
| 2013/14 | 1,970.7 | 317.2 | N/A | 2,287.9 | 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 | 2,087.5 | 412.0 | N/A | 2,499.5 | 676.0 | 1,424.8 | 2,100.8 | 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* | 2,156.0 | 318.3 | N/A | 2,474.3 | 701.2 | 1,423.8 | 2,125.0 | 349.3 |

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

World Destinations

crop years 2014/15–2018/19 | million pounds

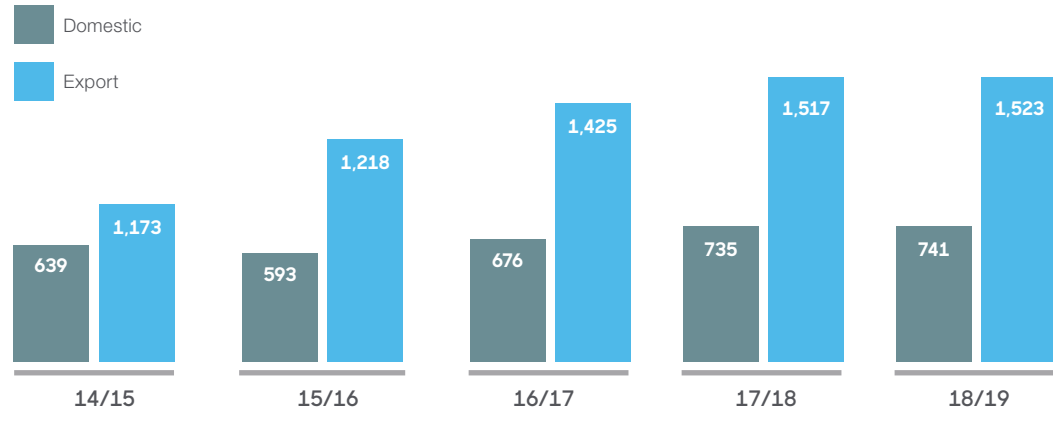
| Destination | 2018/19 | 2017/18 | 2016/17 | 2015/16 | 2014/15 |
|--------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Americas | | | | | |
| North America | | | | | |
| Canada | 60.52 | 58.30 | 55.51 | 44.65 | 38.78 |
| Mexico | 23.55 | 22.17 | 18.47 | 17.42 | 16.60 |
| TOTAL NORTH AMERICA | 84.08 | 80.50 | 73.98 | 62.12 | 55.48 |
| Latin America/Caribbean | | | | | |
| Barbados | 0.86 | 0.03 | 0.01 | 0.02 | 0.01 |
| Brazil | 2.46 | 3.81 | 2.67 | 1.24 | 2.07 |
| Chile | 5.40 | 6.50 | 7.27 | 3.93 | 7.65 |
| Colombia | 3.51 | 3.44 | 2.25 | 1.75 | 1.88 |
| Costa Rica | 1.08 | 0.81 | 0.66 | 0.69 | 0.43 |
| Peru | 1.59 | 2.11 | 1.81 | 0.97 | 1.06 |
| Trinidad | 0.68 | 0.69 | 0.38 | 0.56 | 0.51 |
| TOTAL LATIN AMERICA/CARIBBEAN | 16.88 | 20.88 | 17.35 | 10.36 | 15.58 |
| TOTAL AMERICAS | 100.96 | 101.38 | 91.34 | 72.48 | 71.05 |
| Asia-Pacific | | | | | |
| Northeast Asia | | | | | |
| China/Hong Kong | 128.09 | 169.78 | 150.77 | 141.66 | 128.13 |
| Japan | 81.28 | 78.80 | 71.15 | 61.31 | 65.87 |
| South Korea | 56.92 | 50.84 | 54.45 | 46.23 | 53.48 |
| Taiwan | 9.34 | 9.61 | 11.46 | 9.33 | 10.93 |
| TOTAL NORTHEAST ASIA | 275.63 | 309.04 | 287.93 | 258.53 | 258.41 |
| Southeast Asia | | | | | |
| Indonesia | 4.63 | 3.38 | 2.63 | 2.81 | 2.68 |
| Malaysia | 9.34 | 7.02 | 5.62 | 6.37 | 4.16 |
| Philippines | 0.56 | 0.49 | 0.72 | 0.44 | 0.27 |
| Singapore | 3.85 | 4.08 | 3.57 | 3.33 | 3.65 |
| Thailand | 7.33 | 5.19 | 3.97 | 4.12 | 4.00 |
| Vietnam | 57.23 | 55.17 | 42.59 | 22.12 | 18.74 |
| TOTAL SOUTHEAST ASIA | 83.02 | 75.35 | 59.15 | 39.25 | 33.53 |
| South/Central Asia | | | | | |
| Afghanistan | 2.27 | 1.38 | | 0.00 | 0.00 |
| India | 231.35 | 199.52 | 167.08 | 126.45 | 123.69 |
| Kazakhstan | 7.87 | 7.77 | 0.96 | 0.26 | 0.59 |
| Nepal | 0.54 | 0.15 | 0.29 | 0.19 | 0.04 |
| Pakistan | 9.69 | 11.82 | 20.80 | 12.81 | 2.64 |
| TOTAL SOUTH/CENTRAL ASIA | 251.88 | 221.83 | 193.44 | 140.10 | 127.01 |
| Australasia/Oceania | | | | | |
| Australia | 5.73 | 3.82 | 3.54 | 2.77 | 4.54 |
| New Zealand | 3.70 | 3.36 | 3.29 | 3.80 | 4.02 |
| TOTAL AUSTRALASIA/OCEANIA | 9.46 | 7.22 | 6.84 | 6.58 | 8.56 |
| TOTAL ASIA-PACIFIC | 620.00 | 613.45 | 547.36 | 444.45 | 427.52 |
| Europe | | | | | |
| Western Europe | | | | | |
| Belgium | 24.53 | 20.76 | 19.50 | 20.12 | 19.91 |
| Denmark | 7.48 | 8.23 | 7.42 | 7.28 | 8.24 |
| Finland | 0.56 | 0.34 | 0.61 | 0.53 | 0.72 |
| France | 30.02 | 29.21 | 27.83 | 23.25 | 20.12 |
| Germany | 110.46 | 134.33 | 130.21 | 102.81 | 122.15 |
| Greece | 11.40 | 10.27 | 9.02 | 7.80 | 7.02 |
| Ireland | 0.64 | 0.60 | 0.55 | 0.71 | 1.77 |
| Italy | 67.06 | 68.38 | 58.14 | 57.72 | 42.52 |
| Netherlands | 72.19 | 52.04 | 51.51 | 46.84 | 43.26 |
| Norway | 5.60 | 6.43 | 5.44 | 6.56 | 5.41 |
| Portugal | 1.99 | 2.46 | 1.77 | 1.43 | 1.34 |
| Spain | 195.64 | 203.36 | 210.63 | 201.10 | 153.06 |
| Sweden | 7.20 | 7.31 | 5.66 | 6.70 | 6.24 |
| Switzerland | 5.01 | 4.82 | 3.60 | 7.90 | 6.82 |
| United Kingdom | 32.60 | 34.08 | 34.37 | 32.45 | 29.18 |
| TOTAL WESTERN EUROPE | 572.65 | 583.04 | 566.45 | 523.31 | 468.04 |
| Central/Eastern Europe | | | | | |
| Bulgaria | 2.24 | 2.19 | 2.11 | 1.86 | 2.09 |
| Croatia | 3.03 | 2.15 | 1.87 | 1.13 | 1.59 |
| Czech Republic | 1.80 | 1.84 | 2.11 | 1.41 | 2.32 |
| Estonia | 8.54 | 11.45 | 6.28 | 3.85 | 1.81 |
| Georgia | 1.38 | 0.22 | 0.25 | 0.13 | 0.52 |
| Latvia | 2.51 | 5.52 | 1.55 | 0.62 | 1.15 |
| Lithuania | 4.79 | 4.22 | 3.23 | 1.80 | 3.41 |
| Poland | 4.39 | 3.83 | 2.93 | 1.82 | 1.53 |
| Romania | 0.70 | 0.71 | 1.10 | 0.67 | 0.48 |
| Russia | 1.75 | 1.34 | 1.15 | 0.44 | 0.93 |
| Ukraine | 2.84 | 1.75 | 0.77 | 0.53 | 0.63 |
| TOTAL CENTRAL/EASTERN EUROPE | 35.43 | 36.91 | 25.65 | 15.97 | 18.83 |
| TOTAL EUROPE | 608.08 | 619.95 | 592.10 | 539.28 | 486.87 |
| Middle East/Africa | | | | | |
| Middle East | | | | | |
| Bahrain | 1.69 | 1.50 | 1.15 | 0.94 | 0.69 |
| Cyprus | 1.22 | 1.21 | 1.12 | 1.06 | 0.95 |
| Iraq | 1.24 | 0.96 | 1.11 | 0.50 | 0.00 |
| Israel | 11.53 | 8.75 | 10.49 | 8.72 | 7.14 |
| Jordan | 11.40 | 9.49 | 10.17 | 8.60 | 6.43 |
| Kuwait | 4.87 | 3.72 | 4.27 | 3.62 | 2.88 |
| Lebanon | 7.45 | 6.35 | 5.46 | 6.76 | 4.86 |
| Qatar | 2.92 | 2.10 | 1.12 | 0.39 | 0.62 |
| Saudi Arabia | 20.27 | 14.74 | 20.83 | 14.19 | 13.54 |
| Turkey | 36.14 | 51.74 | 53.46 | 37.15 | 36.59 |
| United Arab Emirates | 69.01 | 63.54 | 64.37 | 57.32 | 98.07 |
| TOTAL MIDDLE EAST | 167.92 | 164.28 | 173.59 | 139.37 | 171.87 |
| North Africa | | | | | |
| Algeria | 7.58 | 5.28 | 9.93 | 8.33 | 6.02 |
| Egypt | 4.08 | 2.25 | 1.91 | 5.73 | 3.27 |
| Libya | 0.84 | 0.39 | 0.41 | 0.65 | 1.07 |
| Morocco | 7.12 | 3.66 | 1.10 | 0.01 | 0.00 |
| TOTAL NORTH AFRICA | 19.96 | 11.84 | 14.58 | 17.74 | 10.87 |
| Sub-Saharan Africa | | | | | |
| South Africa | 5.56 | 5.68 | 5.57 | 4.47 | 4.77 |
| TOTAL SUB-SAHARAN AFRICA | 5.93 | 5.89 | 5.87 | 4.73 | 4.95 |
| TOTAL MIDDLE EAST/AFRICA | 193.81 | 182.01 | 194.04 | 161.83 | 187.69 |
| Total Shipments | | | | | |
| TOTAL EXPORT SHIPMENTS | 1,522.85 | 1,516.79 | 1,424.83 | 1,218.05 | 1,173.14 |
| TOTAL U.S. SHIPMENTS | 741.17 | 734.73 | 675.96 | 593.19 | 639.40 |
| TOTAL GLOBAL SHIPMENTS | 2,264.02 | 2,251.52 | 2,100.79 | 1,811.24 | 1,812.53 |

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 2018/19 are listed.

Domestic + Export Shipments

crop years 2014/15–2018/19 | million pounds

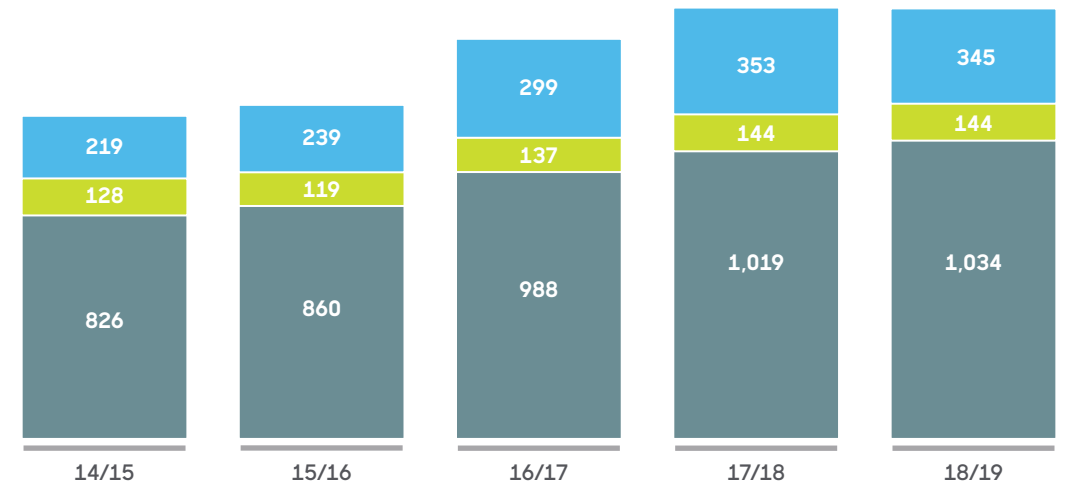


Source: Almond Board of California.

Export Shipments by Product Type

crop years 2014/15–2018/19 | million pounds

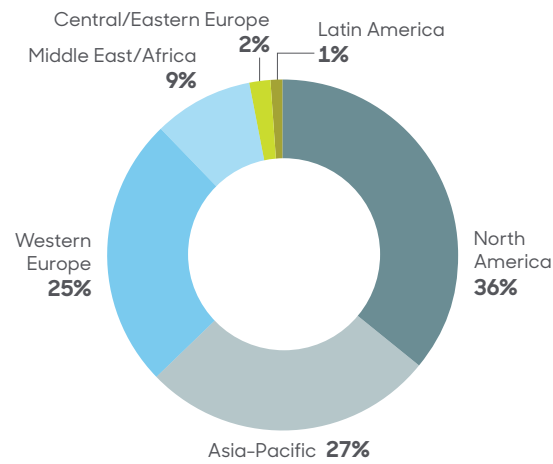
In-shell Manufactured Shelled



Source: Almond Board of California.

Shipments by Region

crop year 2018/19



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

Top Global Destinations

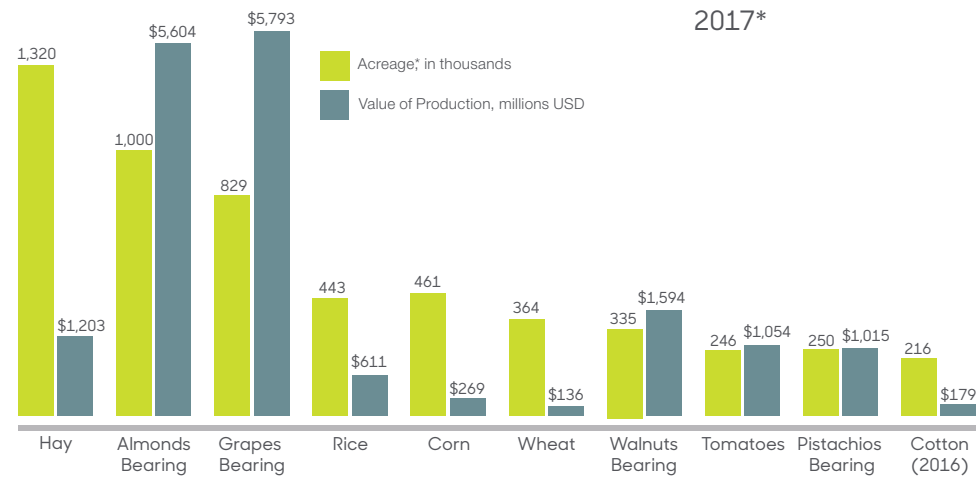
crop year 2018/19 | million pounds



Source: Almond Board of California. July 2019 Position Report

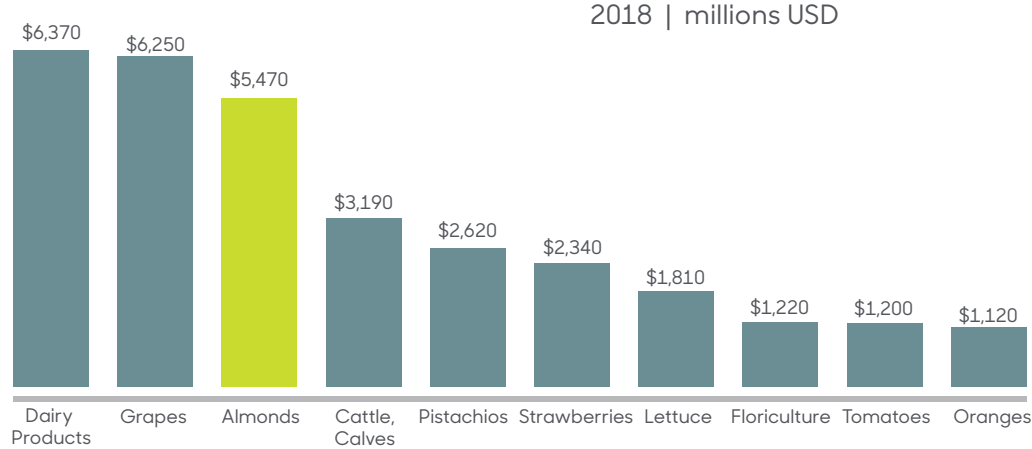


Top Ten California Crop Acreage



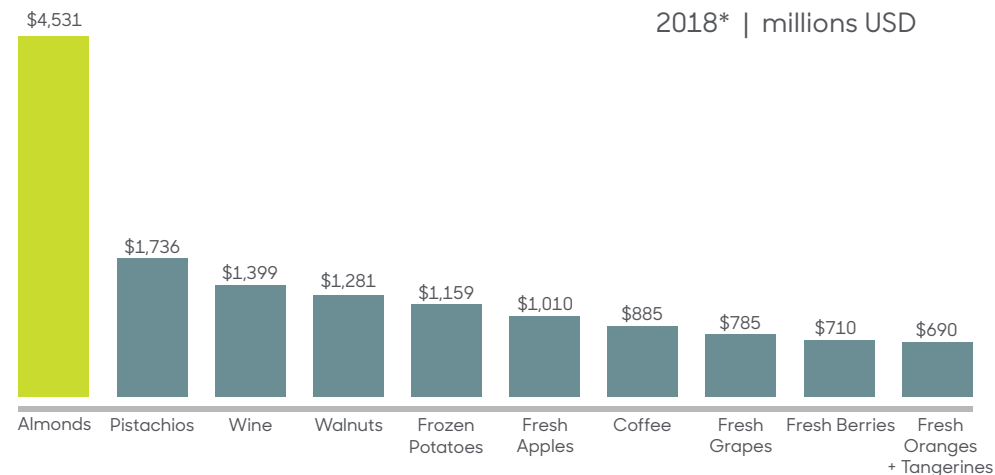
Source: USDA, NASS. *Latest available data at time of publication. Calendar year January through December 2017. Value based on farm-gate prices.

California's Top Ten Valued Commodities



Source: California Department of Food and Ag/Statistics. <https://www.cdfa.ca.gov/Statistics>.

Top Ten U.S. Specialty Crop Exports by Value



Source: USDA Foreign Agricultural Services Global Agricultural Trade System. *Calendar year January through December 2018.

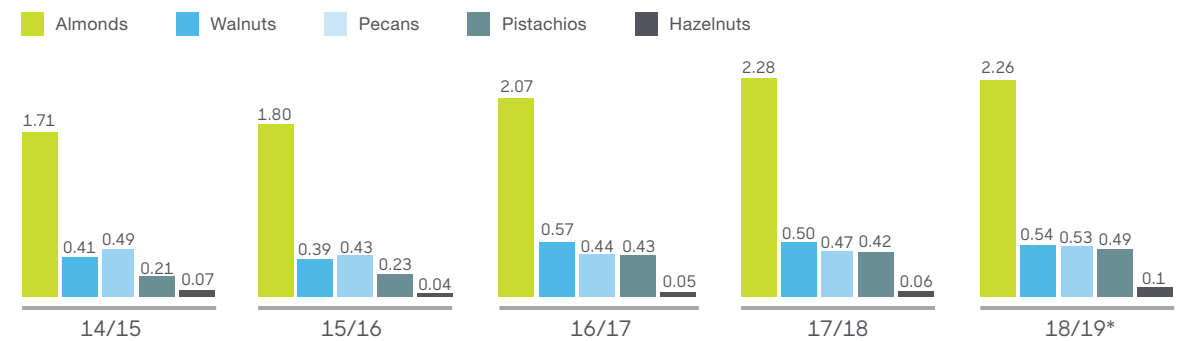
Did You Know?

Growing 400+ commodities, California produces **more than 1/3** of U.S. vegetables and **2/3** of fruits and nuts.



Domestic per Capita Consumption of Tree Nuts

crop years 2014/15–2018/19 | pounds per capita



Source: USDA, Economic Research Service, Fruit & Tree Nut Yearbook Tables. *Preliminary.

U.S. Production + Imports of Competing Nuts

crop years 2009/10–2018/19 | million pounds (shelled basis)

| CROP YEAR | ALMONDS | | WALNUTS | | HAZELNUTS | | PECANS | | PISTACHIOS | | MACADAMIA NUTS | | ALL TREE NUTS | |
|-----------|---------|---------|---------|---------|-----------|---------|--------|---------|------------|---------|----------------|---------|---------------|---------|
| | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports |
| 2009/10 | 1,405.9 | 5.6 | 387.9 | 3.4 | 38.1 | 8.1 | 132.0 | 83.2 | 174.8 | 1.3 | 19.1 | 17.0 | 2,157.8 | 468.9 |
| 2010/11 | 1,628.2 | 8.1 | 441.5 | 0.5 | 21.8 | 10.9 | 140.4 | 88.5 | 250.1 | 0.6 | 18.2 | 19.6 | 2,500.3 | 485.1 |
| 2011/12 | 2,020.4 | 15.9 | 400.6 | 4.8 | 31.2 | 9.6 | 124.6 | 74.6 | 222.0 | 0.9 | 22.3 | 20.2 | 2,821.1 | 449.3 |
| 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 | 20.6 | 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 | 24.0 | 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 | 25.6 | 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 | 19.3 | 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 | 23.4 | 3,233.5 | 738.8 |
| 2018/19* | 2,269.6 | 32.3 | 596.7 | 2.6 | 40.8 | 16.8 | 113.0 | 163.0 | 487.5 | 1.3 | 16.0 | 31.0 | 3,523.6 | 717.2 |

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



Doing More Through Collaboration

For members of the California almond industry and broader U.S. agriculture, the challenges facing food production and the need for a representative voice have never been greater. Since 2013, the Almond Board of California and Almond Alliance of California have worked together to provide the California almond industry with that voice, expanding opportunities to advocate for industry priorities and encouraging support among those who are making decisions that impact the way almonds are grown and sold. In this partnership, ABC provides educational information to state and federal leaders based on the extensive expertise of staff and many years of research funded by the industry.



ABC's Richard Waycott and Daren Williams work at the Almond Board's booth.

ALMOND FESTIVAL

In 2017, the Almond Board launched an almond festival at the California State Capitol to build community and provide fact-based information about California almonds. This year, the Almond Alliance hosted the event on the steps of the Capitol building with many almond industry members exhibiting, including equipment manufacturers, brands and the Almond Board of California.

ANNUAL DELEGATION

ABC hosts a D.C. delegation, providing an opportunity for industry members to meet with and educate federal agencies and legislators about the almond industry. An Almond Alliance representative attends the delegation. Working together, the California almond industry has a respected voice at all levels.



Jonathan Hoff, Richard Waycott, Jessica Illaria, Rep. Josh Harder (CA 10), Mike Curry, George Goshgarian Jr.

Almond Board Resources



Technical Kit

Provides information on almond varieties, forms, handling tips and USDA standards and grades



USDA Almond Grades Poster

An overview of almond varieties, sizes, forms, USDA standards and grades



Almond Almanac

Annual year-end report that provides an overview of almond statistics and ABC programs



Growing Good

Overview of almond sustainability, industry programs and initiatives
Almonds.com/GrowingGood



Goals Roadmap

Illustrates how the almond community is measuring and working toward the Almond Orchard 2025 Goals
Almonds.com/2025Goals



Research Update + Database

An annual publication featuring one-page summaries of each research project underway
Almonds.com/ResearchDatabase



Almond Leadership Program

A year-long program covering all facets of the California almond industry through seminars, tours, special projects and community service events
Almonds.com/AlmondLeadershipProgram



California Almond Sustainability Program

Free online productivity tools and assessment modules for farmers and processors to learn about best practices and regulatory requirements
SustainableAlmondGrowing.org



Ag in the Classroom

Teaching resources explaining how almonds are grown and processed, the history of California almonds and the many ways to enjoy the versatile nut
Almonds.com/AgInTheClassroom



The Almond Conference

Annual event offering insights and research updates on all aspects of growing, processing and marketing almonds
Save the date: December 8-10, 2020
AlmondConference.com



Industry Resource Directory

Connects farmers and processors to allied industries like beekeepers, farm advisors and solar providers.
Almonds.com/ResourceDirectory



Blog

Sharing regular posts about almond research, sustainability and initiatives
Almonds.com/Blog



Newsroom

One-stop shop for the latest news published by ABC
Newsroom.Almonds.com



Twitter

Almond sustainability news served up in 280 characters
[@almondboard](https://twitter.com/almondboard)



Facebook

A place for almond farmers and processors to stay in touch with ABC
[Almond Board of California](http://AlmondBoardofCalifornia)



YouTube

Hub for all Almond Board-produced videos about almonds, industry education and consumer outreach
AlmondBoardofCA



LinkedIn

Information about various ABC initiatives and career opportunities
LinkedIn.com/company/almond-board-of-california/



Questions? Collateral requests?
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