



ALMOND BOARD OF CALIFORNIA

A

20
20

L

M

ALMOND ALMANAC



20
20



ANNUAL REPORT

Welcome to the 2020 Almond Almanac

Within these pages you will find a comprehensive overview of California almonds—the state’s #1 crop by acreage, #1 ag export and #2 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, and an overview of 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 102 processors in California.

1. 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. 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.

TABLE OF CONTENTS

INTRODUCING THE CALIFORNIA ALMOND COMMUNITY

- 2 Mission + Vision
- 3 2020 Milestones
- 4 About Our Community

ALMOND BOARD OF CALIFORNIA PROGRAMS

- 6 Programs + Budget
- 7 Almond Orchard 2025 Goals
- 8 California Almond Sustainability Program
- 9 Research Overview
- 10 Production and Environmental Research
- 14 Nutrition Research
- 16 Almond Quality + Food Safety
- 17 Global Technical + Regulatory Affairs
- 18 Global Communications
- 21 Global Market Development
- 22 Regional Market Updates

CALIFORNIA ALMOND FACTS AND FIGURES

- 30 California Almond Forecasts vs. Actual Production
- 31 California Almond Crop Estimates vs. Actual Receipts
- 32 California Almond Acreage + Farm Value
- 33 Crop Value + Yield per Bearing Acre
- 35 California Almond Production by County
- 36 California Almond Receipts by County + Variety
- 37 Top Ten Almond-Producing Varieties
- 38 Position Report of California Almonds
- 39 World Destinations
- 40 Domestic + Export Shipments
- 41 Top Global Destinations
- 42 California’s Top Ten Valued Commodities
- 43 Domestic per Capita Consumption of Tree Nuts

RESOURCES

- 44 Doing More Through Collaboration
- 45 Almond Board Resources



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.

20
20
MILESTONES

Amidst the challenges brought on by 2020, the California almond industry and Almond Board of California (ABC) hit many milestones that propelled the industry forward. Here are a few examples:

70 YEARS STRONG: Launched in 1950, the Almond Board of California celebrated 70 years of industry service.

NEW WEBSITE: ABC debuted the new Almonds.com in 11 regions around the world.

LAUNCHED THREE NEW AD CAMPAIGNS: ABC's Global Market Development team launched new advertising campaigns in three countries: the UK, India and China. *Learn more on pages 21-29.*

CALIFORNIA ALMOND SUSTAINABILITY PROGRAM (CASP): ABC officially launched the CASP Supply Chain Program. *Learn more on page 8.*

ALMONDS LOVE BEES: 2020 marked 25 years of investment in bee health research, and ABC launched the Five Point Pollinator Protection Plan and Bee+ Scholarship. *Learn more on page 11.*

NUTRITION RESEARCH PROGRAM CELEBRATES 25 YEARS:

Over the past 25 years, ABC published 185 nutrition research studies, 183 under the direction of Dr. Karen Lapsley, who retired after 21 years of service. *Learn more on pages 14-15.*

STRATEGIC INNOVATION: To guide future ABC-funded research, staff engaged with Strategic Ag Innovation Committee workgroups to develop long-term strategies in the areas of harvest, irrigation, breeding and pest management. *Learn more on page 10.*

CORONAVIRUS ASSISTANCE: Almonds were included in USDA's Coronavirus Food Assistance Program and Section 32 food purchase program through efforts led by the Almond Board and Almond Alliance of California. *Read more on page 44.*

PARTNERSHIP WITH THE ATLANTIC: ABC's Sustainability Communications team collaborated with *The Atlantic* to produce an online article and short documentary highlighting the almond community's responsible growing practices. *Read more at bit.ly/almondatlantic.*

About Our Community

FARMERS

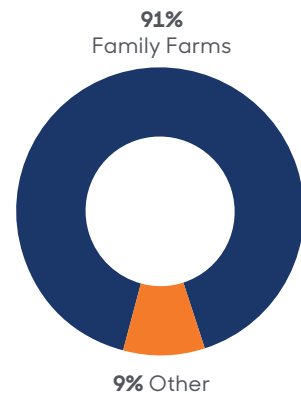
The California almond growing community is driven by **family farmers**.

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.

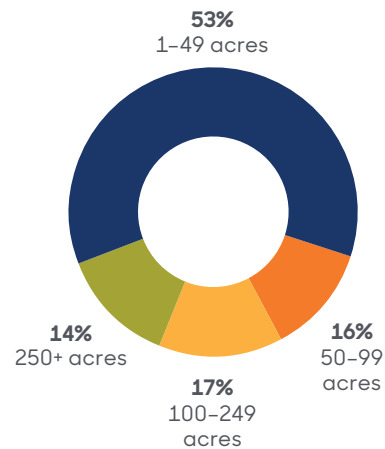
ORCHARDS

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 2012 Census of Agriculture.



Source: USDA 2017 Census of Agriculture.

7,600

FARMERS grow almonds in California, producing nearly **80%** of the global supply.

102

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

DESTINATIONS

DOMESTIC

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

2019/20 domestic shipments marked the **largest in history** at **774 million pounds**.

INTERNATIONAL

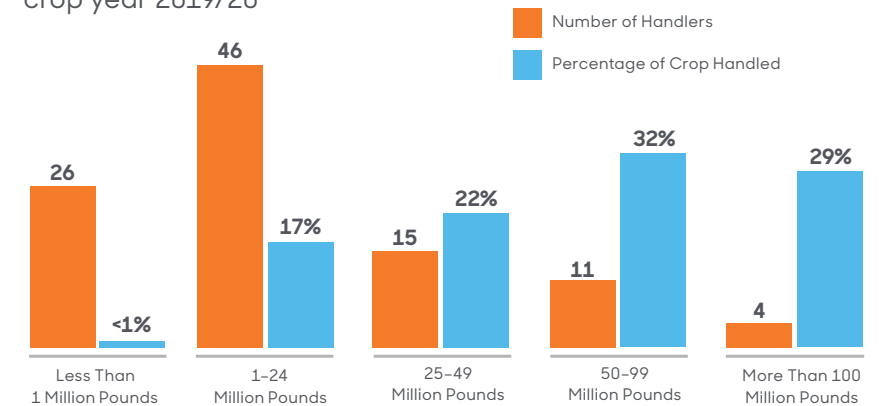
For the second year in a row, **INDIA** WAS THE TOP EXPORT MARKET.

2019/20 export shipments went to more than **100 countries**.

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

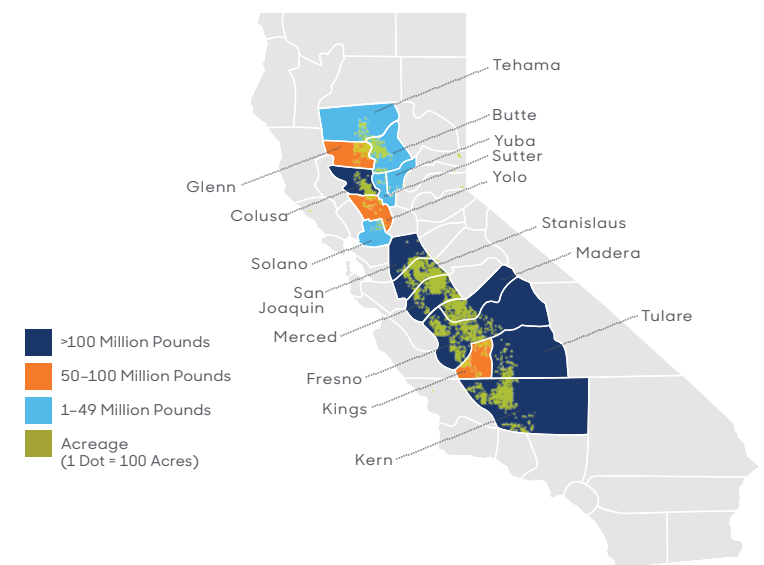
Distribution of Crop by Handler Size

crop year 2019/20



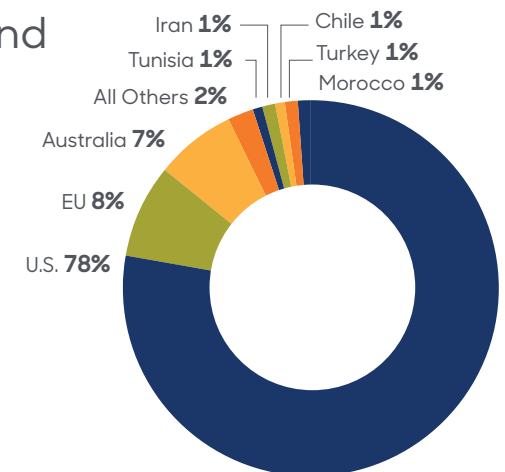
Where Almonds Are Grown

production by county | crop year 2019/20



World Almond Production

crop year 2019/20



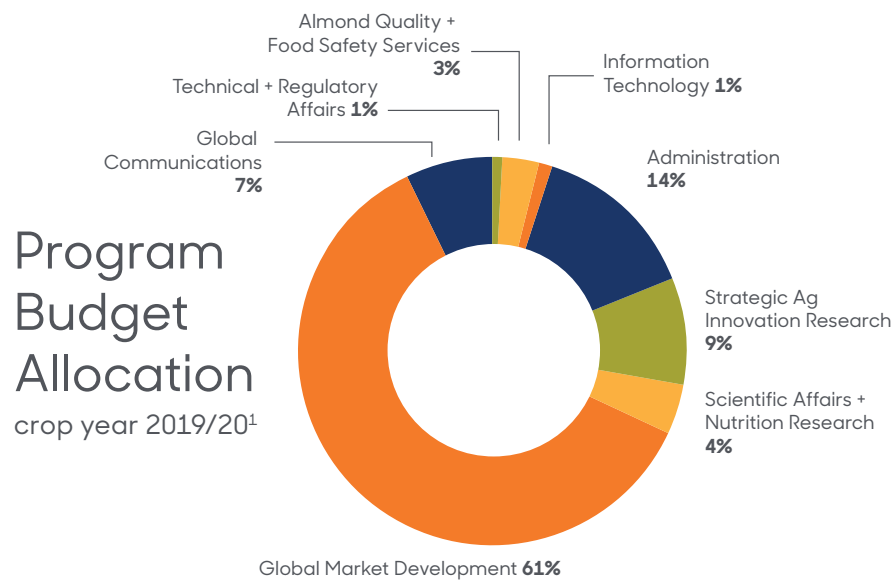
Source: International Nut and Dried Fruit Council.



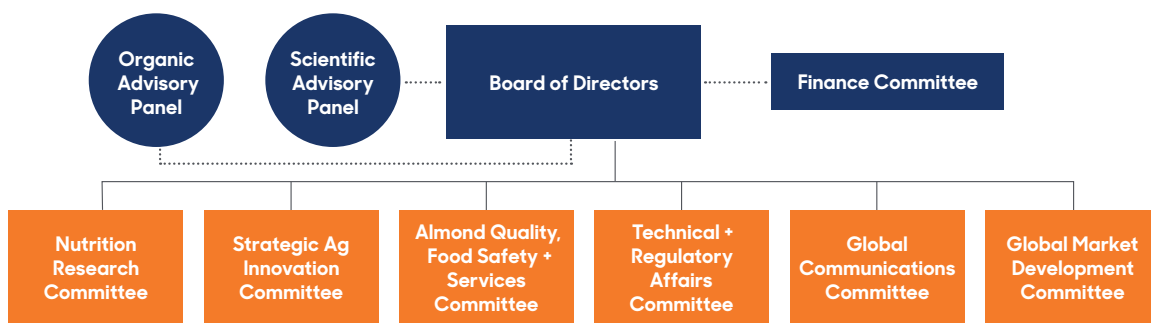
ALMOND BOARD OF CALIFORNIA

Programs + Budget

The Almond Board of California’s programs are funded by an assessment placed on each pound of almonds grown in California. Working with board-appointed committees, subcommittees and workgroups, the Board of Directors approves the budget allocation for each program area. These areas are defined in the Program Budget Allocation chart below, and program updates can be found throughout the Almanac.



Committee Structure



The Almond Leadership Program 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. Program requirements can be found at Almonds.com/AlmondLeadershipProgram

1. Totals may not add precisely due to rounding.



Established in 2018, the Almond Orchard 2025 Goals are a tangible example of the California almond community’s commitment to continuous improvement. Built on a foundation of past successes, the goals help focus our research and outreach priorities in key areas—water, pest management, zero waste and dust—and provide a roadmap leading toward the industry’s future. They also are a way to proactively address questions from regulatory officials, food manufacturers and the public about how almonds are grown.

NOW, JUST TWO YEARS INTO THE GOALS, THERE ARE MANY SIGNS OF PROGRESS BEING MADE UP AND DOWN CALIFORNIA’S CENTRAL VALLEY. HERE ARE A FEW EXAMPLES:



FURTHER REDUCING THE WATER USED TO GROW ALMONDS

SIGN OF PROGRESS: IRRIGATION SYSTEM MAINTENANCE

In partnership with local Resource Conservation Districts, the extension arm of California’s Department of Conservation, ABC is helping farmers get back to basics, ensuring their irrigation systems are efficiently delivering every drop.



ACHIEVING ZERO WASTE IN OUR ORCHARDS

SIGN OF PROGRESS: WHOLE ORCHARD RECYCLING

At the end of their productive lives, whole almond trees are ground up and incorporated into the soil. Research published by UC Davis in 2020 validates that whole orchard recycling improves soil health, boosts water efficiency, increases yields and reduces greenhouse gases!



INCREASING ADOPTION OF ENVIRONMENTALLY FRIENDLY PEST MANAGEMENT TOOLS

SIGN OF PROGRESS: MATING DISRUPTION

New technology is allowing farmers to interrupt the mating cycle of navel orangeworm (NOW) moths, reducing their numbers. Pheromones confuse male moths, making them unable to find females. In combination with winter sanitation, mating disruption is part of an effective Integrated Pest Management strategy for NOW.



IMPROVING LOCAL AIR QUALITY DURING ALMOND HARVEST

SIGN OF PROGRESS: RETHINKING HARVEST

Almond farmers are exploring new approaches to harvest, including semi-off-ground harvest using a catch-frame system that drops almonds into windrows, reducing dust. Researchers and farmers are also experimenting with off-ground harvest, testing equipment and drying options used by different farming regions around the world.

For more information on the Almond Orchard 2025 Goals, visit: Almonds.com/Goals

1. Emad Jahanzad, et al. Orchard recycling improves climate change adaptation and mitigation potential of almond production systems. PLoS ONE. March 2020.



Measuring Progress

A sustainability program tailor-made for almond farmers and processors, the California Almond Sustainability Program (CASP) is a self-assessment tool that allows participants to evaluate their practices and identify areas for improvement relevant to their operation. CASP, established in 2009, provides years of data that allows the industry to measure adoption of best practices as well as its **progress toward the Almond Orchard 2025 Goals**. This data can be leveraged to communicate to customers, consumers and regulators what farmers are doing in the orchard to meet demand via responsible growing practices.

SAI **RECOGNIZED GLOBALLY**

Benchmarked gold-level equivalent against the Sustainable Agriculture Initiative Platform’s Farm Sustainability Assessment (FSA), CASP provides a common language to translate the practices relevant to growing almonds in California to general sustainable farming practices. Of the farms that have measured their individual practices against the FSA through CASP, 83% are silver-level equivalent or better, indicating top sustainability performance!

CASP SUPPLY CHAIN PROGRAM

In response to increasing questions from buyers and retailers about how almonds are grown, ABC launched the CASP Supply Chain Program. The program’s main objective is to allow farmers to share data on their growing practices anonymously, in aggregate, with processors, who can provide that data to buyers whose customers are increasingly interested in how their food is grown.

JOIN THE JOURNEY

Adapting to the COVID-19 landscape, ABC staff and partner organizations quickly shifted regular in-person CASP workshops to virtual tailgate meetings and lunch + learn gatherings. Over 2,000 farmers, field managers, applicators and others attended these events in 2020. Given the great success of those events, CASP will be offering a mix of virtual and in-person events in 2021.

6,020
MODULES IN 2019¹

A record for the most CASP modules completed in one year.

13,171

CASP modules completed since 2009, assessing **27%** of California’s productive almond acreage!

1. California Almond Sustainability Program. November 2020

Innovation Through Research

Rooted in research and founded in fact, ABC supports the almond community by investing in independent scientific research.

Since 1973, the Almond Board of California’s research-focused committees have guided the investment of 95 million farmer dollars, working with leading universities and experts to uncover the positive impacts of almonds on human health, improve food safety and yields and optimize farming practices.

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

Strategic Ag Innovation Committee

FOUNDED: 1973
INVESTMENT TO DATE: \$53.4M
PROJECTS FUNDED: 457

For more about farming innovation and sustainability, see pages 10-13.

Nutrition Research Committee

FOUNDED: 1995
INVESTMENT TO DATE: \$31.4M
PROJECTS FUNDED: 119

For more about almonds’ impact on human health, see pages 14-15.

Almond Quality, Food Safety + Services Committee

FOUNDED: 2001
INVESTMENT TO DATE: \$10.7M
PROJECTS FUNDED: 120

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



Building the Orchard 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. We have supported that commitment with nearly 50 years of investment in research to improve farming practices and increase profitability while minimizing environmental impacts.

A STRATEGIC APPROACH

ABC-funded production and environmental research is directed by the industry, for the industry. Guiding that investment are seven distinct workgroups, each composed of farmers, processors and allied industry stakeholders. Based on research priorities set by the Strategic Ag Innovation Committee (SAIC), the workgroups review research proposals, track progress within their respective focus areas and develop long-term research strategies to achieve priorities.

Between SAIC and the workgroups, 77 almond industry members volunteer their time and expertise to guide these important efforts.



IRRIGATION, NUTRIENTS + SOIL HEALTH

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



ORCHARD, TREE + ROOTSTOCK

Including rootstock and variety breeding and evaluation, orchard configuration and yield-based management



PEST MANAGEMENT

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



HARVEST

Re-envisioning almond harvest to improve almond quality, reduce dust and improve efficiency



POLLINATION + BEE HEALTH

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



BIOMASS

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



SUSTAINABILITY

Guiding the California Almond Sustainability Program and quantifying almonds' sustainability

Did You Know?
Reports from all ABC-funded research can be found at Almonds.com/ResearchDatabase.

Pollination Partners

Honey bees and almonds: a partnership designed by nature. When almond trees bloom, bees get their first nutritious¹ food source of the year as they pollinate our orchards, consistently leaving stronger than they arrive². While bees are only with us for two months of the year, we work to support their health for all twelve because what's healthy for bees supports healthy, high-yielding almond farms.



RESEARCH FOR BETTER BEE HEALTH

ABC has led bee research efforts since 1995, funding 126 projects so farmers can confidently provide safe habitats for bees before they move on to pollinate other crops. Looking beyond our orchards, we're also working with experts to collaboratively solve the complex set of challenges bees face: varroa mites, other pests and diseases, lack of floral resources, limited genetic diversity and pesticide exposure.



FARMER BEST PRACTICES

Developed in collaboration with partners beyond our industry, ABC's Honey Bee Best Management Practices serve as a guide to almond farmers and other crops for protecting bee health on-farm. Some almond farmers are taking these practices a step further by planting blooming cover crops and hedgerows, and adding supplemental nutrition and habitat for all pollinators.



SUPPORTING BEEKEEPERS

Both in their operations via partnerships for pollination services and through Almond Board-led collaborations, almond farmers have been longtime allies of beekeepers. One of those collaborations, the Bee Informed Partnership's Tech Transfer Teams, provides highly-trained field agents to work with U.S. beekeepers, monitoring hives and advising on pest and disease best practices.

Working Lands That Work Harder

Over the past year, nonprofit Project Apis m. added 104 new almond farmers³ to its Seeds for Bees program, providing pollinator habitat on-farm. In the same period, there was a 200% increase in the amount of land California almond farmers reported dedicating to growing⁴ pollinator-friendly cover crops in or adjacent to almond orchards.



1. Ramesh Sagili. Department of Horticulture, Oregon State University. 2. Ellen Topitzhofer, et al. Assessment of Pollen Diversity Available to Honey Bees in Major Cropping Systems During Pollination in the Western United States. Journal of Economic Entomology. 2019. 3. Billy Synk, Director of Pollination Services, Project Apis m. November 2020. 4. California Almond Sustainability Program. November 2020.



By 2025, the almond community commits to **reduce the amount of water** used to grow a pound of almonds by an additional 20%.

Water Wise

With its Mediterranean climate, California is one of the five places on earth where almonds can grow—a key reason why farmers are committed to using this precious natural resource in the most sustainable way possible. It’s also why 85% of almond orchards use efficient microirrigation¹, an important contributor to the 33% reduction in the amount of water needed to grow each pound of almonds between the 1990s and 2010s.² But we know there is still more to be done, and that’s why we’re doing it.



IRRIGATION CONTINUUM

This resource summarizes decades of water efficiency research and was created to help almond farmers accelerate adoption of water-conserving best practices and technology. The guide is split into five key areas: monitoring irrigation system performance, soil moisture, plant water status, calculating orchard water requirements and measuring applied water.



BOOTS ON THE GROUND

The ABC Field Outreach and Education team provides on-farm support for almond farmers, meeting one-on-one to share best practices and technical information, like the Irrigation Continuum. Collaborating with local partners, ABC is also helping farmers ensure their irrigation systems are using water efficiently via free distribution uniformity testing.



RESEARCHING NEW TECHNOLOGIES

Since the 1980s, ABC has been investing in irrigation efficiency research, funding 228 projects to date and ensuring farmers get the most crop per drop. With the addition of a new long-term irrigation research strategy, this program continues with focus on validating emerging precision irrigation technologies for use in almonds.



By 2025, the almond community commits to **achieve zero waste in our orchards** by putting everything we grow to optimal use.

Circular Economy

Almonds grow in a shell, protected by a hull, on a tree. Traditionally these coproducts were used for livestock bedding, dairy feed and electricity generation. Today, the almond community is spurring innovation for higher-value and more-sustainable uses, with 85 projects funded to date and promising research in the areas of recycled plastics, fuel, regenerative agriculture and more.



MATERIAL: HULLS

SOIL PEST MANAGEMENT

In a process known as biosolarization, almond hulls, water, tarps and the power of the sun create the ideal environment for soil microbes to beat out harmful soil pests, providing an alternative to fumigants. While research continues into its long-term effectiveness, early results are promising and also support the almond community’s 2025 pest management goal.



MATERIAL: SHELLS

RECYCLED PLASTICS

Through torrefaction (burning in the absence of oxygen) almond shells are transformed and added to post-consumer recycled plastics, giving them added strength, heat stability and color. This approach increases our ability to recycle existing plastic, resulting in less new plastic in the world.



MATERIAL: TREES

WHOLE ORCHARD RECYCLING

At the end of their productive lives, whole almond trees are ground up and incorporated back into the soil, a climate-smart approach that improves soil health, boosts water efficiency and increases yields in subsequent orchards.¹ Farms that use this practice sequester 2.4 tons of carbon per acre, equivalent to living car-free for a year.²

1. California Almond Sustainability Program. Nov. 2020. 2. University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990–94, 2000–14.

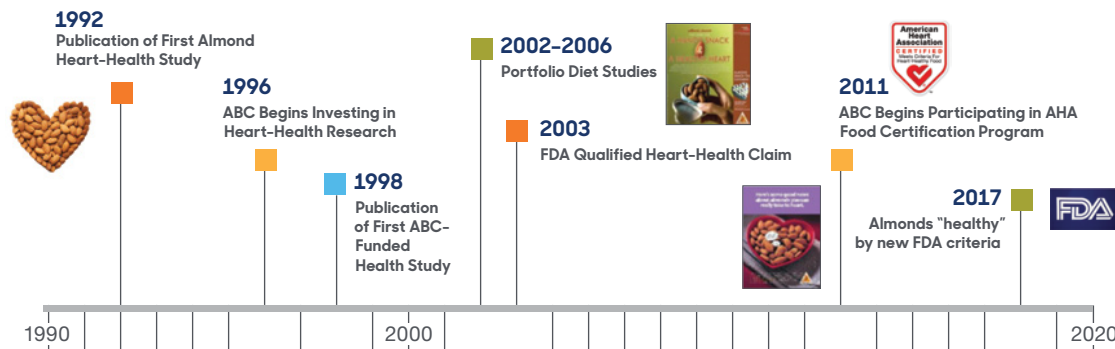
1. Emad Jahanzad, et al. Orchard recycling improves climate change adaptation and mitigation potential of almond production systems. PLoS ONE. March 2020. 2. Seth Wynes, et al. The climate mitigation gap: education and government recommendations miss the most effective individual actions. Environmental Research Letters. 2017.

NUTRITION RESEARCH

Our 25-Year Heart Health Journey

The foundation of the Almond Board of California's nutrition research program is heart health, from humble beginnings exploring almond impact on cholesterol levels, followed by several studies generating reproducible results in different populations globally, the latest science is exploring the role of almonds in improving vascular health*.

25 Years of Heart Health Research



Since 1995, ABC has funded **>20** heart-health research projects.

POPULATIONS STUDIED



PARTICIPANT RANGE



New Study

investigated how **almonds influence blood vessel health¹** (via flow-mediated dilation) and **the heart's response to mental stress²** (via heart rate variability).

*FDA Qualified Health Claim: Scientific evidence suggests, but does not prove, that eating 1.5 ounces of most nuts, such as almonds, as part of a diet low in saturated fat and cholesterol may reduce the risk of heart disease.

Did You Know?

- LDL:** Low-Density Lipoprotein or "bad" cholesterol levels should be "low" (less than 100mg/dL)³
- HDL:** High-Density Lipoprotein or "good" cholesterol levels should be "high" (60mg/dL or higher)¹
- TC:** Total Cholesterol levels reflect overall cholesterol-related health and should be less than 200mg/dL to be healthy²

FMD: Flow-Mediated Dilation indicates the health of your blood vessels. If they dilate easily, then they are healthy. Improved FMD means increased blood flow.

HRV: Heart Rate Variability indicates the heart's response to mental stress. Increased HRV indicates a heart better capable of adapting to fluctuations in mental stress.

Published Heart-Health Benefits*

Systematic Reviews and Meta Analyses (SRMA) pool data from existing studies to allow researchers to draw meaningful conclusions from a comprehensive body of research. These analyses seek to overcome differences in study design and methodology as well as individual study limitations and are considered the highest level of evidence available⁴.

A 2016 systematic review and meta-analysis published in the *Journal of Nutritional Science* examined the collective effect of 1.5 oz per day almond consumption on blood lipids. The analysis of 18 published randomized controlled trials with 867 total participants concluded that almonds have favorable effects on total and "bad" LDL cholesterol levels and triglyceride levels and maintained "good" HDL cholesterol levels among participants eating at least 1.5 oz (~45 grams) per day.

SYSTEMATIC REVIEW AND META-ANALYSIS RESULTS

Effects of almonds on blood lipids.

- LOWERS:** LDL cholesterol
- LOWERS:** Total cholesterol
- LOWERS:** Triglycerides
- MAINTAINS:** HDL cholesterol



1. Dikariyanto V et al. Snacking on whole almonds for 6 weeks improves endothelial function and lowers LDL cholesterol but does not affect liver fat and other cardiometabolic risk factors in healthy adults: the ATTIS study, a randomized controlled trial. *American Journal of Clinical Nutrition*. 111(6):1178-1189. 2. Dikariyanto V, Smith L, Chowienczyk PJ, Berry SE, Hall WL. Snacking on whole almonds for six weeks increases heart rate variability during mental stress in healthy adults: a randomized controlled trial. *Nutrients*. 12(6):1828. 3. Musa-Veloso K, Paulonis L, Poon T, Lee H-Y. 2016. The effects of almond consumption on fasting blood lipid levels: a systematic review and meta-analysis of randomized controlled trials. *Journal of Nutritional Science*. 5(e34):1-15. 4. Haidich AB. Meta-analysis in medical research. *Hippokratia*. 2010;14(Suppl 1):29-37. 5. https://www.cdc.gov/cholesterol/cholesterol_screening.htm

A Long-Standing Commitment to Food Safety

The Almond Board of California's Almond Quality and Food Safety program ensures 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.

EXCEEDING SAFETY EXPECTATIONS



California almonds' commitment to food safety has long preceded U.S. FDA Produce Safety and Preventive Control requirements under the Food Safety Modernization Act (FSMA). In March 2019, the FDA issued a final Guidance Document recognizing the food safety programs the California almond community **proactively and voluntarily** created and implemented over the years. This means that through enforcement discretion, almond farmers and huller/shellers are no longer subject to Produce Safety requirements, validating the food safety controls already in place.

ALMOND FOOD SAFETY STARTS IN THE ORCHARD



Prevention begins in the orchard using Good Agricultural Practices (GAPs) and continues through to the huller/sheller and handler operations using Good Manufacturing Practices (GMPs). For California almonds, GAPs were first launched and widely adopted in 2001 as the **cornerstone of food safety, and focus on how to control and mitigate contamination at the orchard level**. Farmers today follow generation two of the GAPs, with generation three to be released in early 2021—reflecting current best industry practices intended to maximize food safety.

EXPANDING PASTEURIZATION OPTIONS

ABC's pasteurization program was **established in 2007** to ensure a safe, nutritious food product. Since the program's inception, there have been zero outbreaks of foodborne illness attributed to California almonds. As the program continues to evolve, pasteurization methods have expanded to include many options—dry heat, blanching-type processes, oil roasting and more. Many more processes have been validated in the EU and around the globe.

Leading Exports in a Rapidly Changing Global Environment

Almond Board of California is working across markets and stakeholders, finding strategic and collaborative ways to address the complexities of the agriculture supply chain. Integrating Almond Board-funded research, the California Almond Sustainability Program (CASP) aggregated data, Almond Orchard 2025 Goals and technical expertise, ABC is actively working on the industry's behalf to ensure California almonds remain a leader in a rapidly changing global environment.

In 2020, ABC actively addressed almond-related issues in several key markets by:

- U.S.**
 - Monitoring water quality and Irrigated Lands Regulatory Program, air quality, pesticide policy and farmer incentives.
 - Following Sustainable Groundwater Management Act rollout.
 - Submitting over 25 comments concerning U.S. and global standards, chemical tools and more.
 - Partnering with researchers, farmers and NGOs to help farmers sustainably manage California's vital resources.
- India**
 - Educating authorities on quality versus food safety grade standards.
 - Promoting nutrition benefits under Indian regulations.
- China**
 - Developing protocol under U.S.-China Phase 1 agreement for export of pelletized or cubed almond hulls.
 - Engaging with the U.S. Trade Representative on retaliatory tariffs.
- North Africa/ Middle East**
 - Supporting various issues in **Morocco, Algeria, Oman**, like resolving redundant import paperwork, navigating market closures and more.
- EU**
 - Addressing recognition of less than 1% inspection level.
 - Facilitating EU protocols for reprocessing rejected consignments.
 - Engaging with U.S./EU stakeholders on pesticide and sustainability requirements.
- Japan**
 - Developing aflatoxin strategies with U.S. government.

GLOBAL COMMUNICATIONS

How We Grow

Global Communications serves two primary purposes. The first is to keep farmers and processors informed of the latest research, innovation, consumer attitudes and behaviors, and global issues impacting how we grow almonds. The second is to share the story of how we grow almonds—responsibly—with consumers around the world.

TRANSFERRING KNOWLEDGE TO THE ALMOND COMMUNITY



A core element of the Global Communications program is transferring knowledge from Almond Board of California-supported research to farmers and processors. The Almond Board's Field Outreach program, in-the-orchard workshops, print and digital publications, and The Almond Conference are all focused on ensuring farmers and handlers have the information they need to make key decisions to improve profitability and make continuous improvements in how they grow and process almonds.

The Global Communications team also shares important updates on Almond Board programs, like global marketing and technical and regulatory affairs, with farmers and processors. The weekly In The Orchard digital and bimonthly How We Grow print newsletters are a great way to stay informed on what the Almond Board is doing to promote almonds around the world.



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

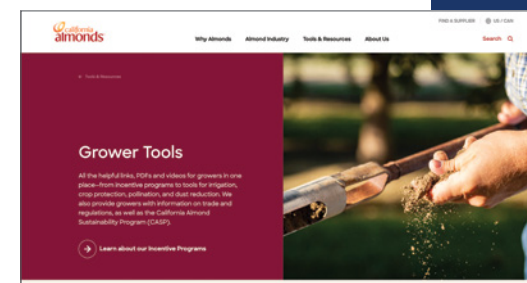
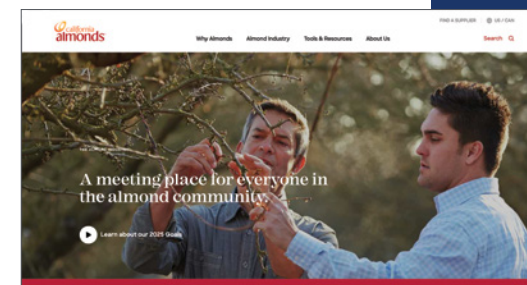
The Atlantic

ABC collaborated with *The Atlantic* to produce an online article and short documentary highlighting the almond community's responsible growing practices. To view the article and documentary visit bit.ly/almondatlantic.



SHARING HOW ALMONDS ARE GROWN WITH PEOPLE OUTSIDE OF AG

Consumers all over the world love almonds for their nutrition and versatility. In fact, this "health halo" is based upon 20+ years of Almond Board-funded nutrition research exploring the various health benefits of almonds. However, consumers are increasingly interested in learning more about how their food is grown—and who grows it. The Global Communications team is dedicated to educating the public about almonds' orchard-to-table story and sharing the responsible practices used to grow them. *Learn more on page 20.*



Did You Know?

The newly redesigned Almonds.com takes an industry-first focus with two main areas for the industry to stay informed:

- 1 The Almond Industry tab
- 2 The Tools & Resources tab

Visit the new Almonds.com today.

Building Trust

Across the globe, people love almonds for their nutrition and versatility. Building upon that "health halo," ABC's Sustainability Communications program works to bolster the reputation of California almonds by highlighting the farmers who grow them and the responsible practices used in their production.

SUSTAINABILITY COMMUNICATIONS

While this program historically focused on direct communications within the U.S. and supporting ABC's global marketing regions when issues arise, this year it has expanded into Europe, working to understand expectations and opportunities in that market.



FUELING UP

One of the ways ABC is spreading the word is by sponsoring electric vehicle charging stations at premium grocers in key California cities and across the U.S.

Did You Know?

Almonds.com/GrowingGood is your online home for almond sustainability—including the 2020 edition of our annual sustainability report, *Growing Good*.

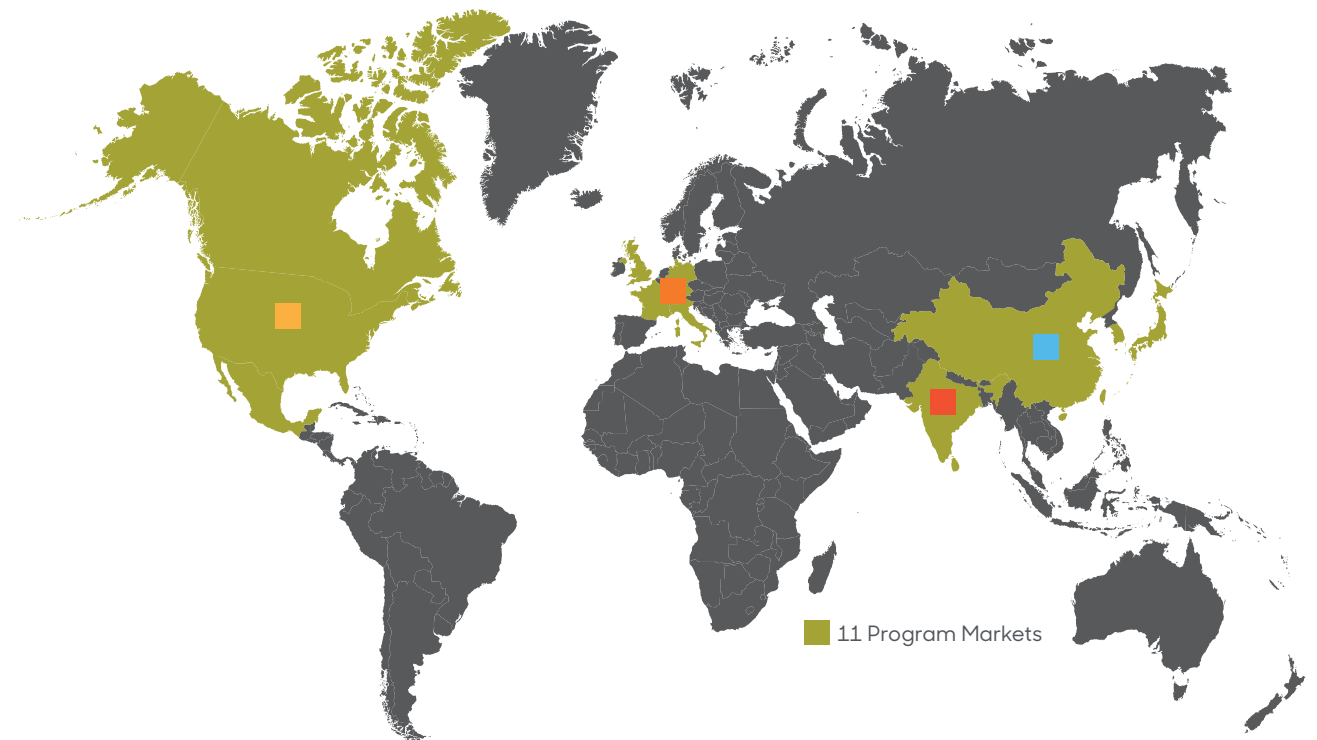


Building Demand for Almonds Around the World

The Almond Board of California is charged with building long-term demand for California almonds. By conducting a rigorous market analysis, the Global Market Development team identifies and prioritizes the best markets around the world that will provide the greatest return on investment to the almond community. The Almond Board currently runs marketing programs in 11 key markets. *Learn more about ABC's marketing activities on pages 22-29.*

GLOBAL SPOTLIGHT: ALMONDS CONTINUE TO GROW AS A KEY INGREDIENT IN CONSUMER PRODUCTS

Almonds have long been used by food manufacturers because of their great taste, versatility and nutrient content. Today, consumers are becoming more conscious of their food choices and almonds are extremely versatile across food trends and product preferences. The 2019 Global New Product Introductions (NPI) Report showed almonds being introduced in traditional categories as well as newer categories for almonds like dairy alternatives and spreads. The expansion of almond usage is being seen around the world:



Almonds continued to be the **#1 nut globally** with over **12,000 new products** introduced. This is up **+13% over 2018**.

- In the U.S., almond NPI grew at a faster rate than all other nut types.
- Europe had the greatest number of almond NPI at 5,416. In fact, almonds overtook hazelnuts as the nut with the most NPI in 2015 and have maintained the lead since.
- Asia-Pacific is the fastest-growing region for almond NPI.
- India recorded the highest growth of almond NPI, up 64% from 2018 to 2019. Additionally, almonds overtook cashews to become the #1 nut type in India for NPI.

1. Innova Market Insights, 2019 Global New Product Introductions Report, May 2020. The Global New Products Report is an annual tracking study monitoring overall new product introductions, as well as new product introductions that contain almonds and other nuts.

GLOBAL MARKET DEVELOPMENT



United States

MARKET SUMMARY

Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 1999
FY 2019/20 Shipments: 774 Million Pounds

THE SNACK THAT FUELS AMERICANS

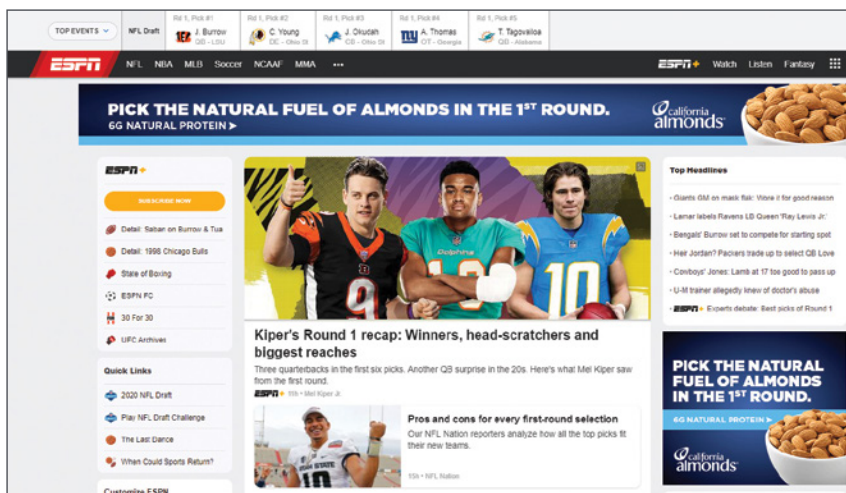
The U.S. marketing program is driving demand for almonds as a snack by ensuring that when consumers need energy, they reach for the natural, energy-giving protein of almonds.

SKIN HEALTH: In 2019, the very first research study exploring almonds and skin health was published. The team launched an educational campaign across social media, digital, radio and public relations to build awareness of the findings of this new study!



NEW ADVERTISING: In 2020, the U.S. team launched a new series of advertisements under a “garage sale” theme where almonds are shown as saving the day in a fun, relevant manner. This advertising has been quite effective, and the social media strategy was adjusted later in the year to communicate how almonds can fuel working and workouts from home to be more relevant during the COVID-19 pandemic.

RELEVANT SPORTS PROGRAMMING: After the Almond Board of California’s (ABC) Olympic programming was delayed, the U.S. team quickly responded with a new plan that included being a lead online sponsor for the 2020 NFL draft. Additionally, ABC capitalized on eSports trends, a form of competitive video gaming, partnering with Twitch, a livestreaming platform, on an integrated program featuring livestreaming and advertising.



Mexico

MARKET SUMMARY

Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 2018
FY 2019/20 Shipments: 24 Million Pounds

#PONTEALMENDRA

Consumers in Mexico report it is difficult to make good decisions when it comes to choosing snacks that are good for them. The ABC program in Mexico reinforces the idea that one good choice—almonds—can lead to big changes.

“IPONTE ALMENDRA!”: Social media is a highly efficient advertising vehicle for most markets, and in Mexico it is the best advertising platform to reach our target consumer. When the coronavirus pandemic led to stay-at-home orders in Mexico, the marketing team got creative and partnered with online fitness coaches to reach consumers through ABC’s #PonteAlmendra at-home social media campaign. These fitness coaches created challenges for consumers, encouraging them to snack well (on almonds) while also exercising. One challenge was dubbed #ExerciseNut, playing off the concept of snacking on almonds paired with exercise.



Canada

MARKET SUMMARY

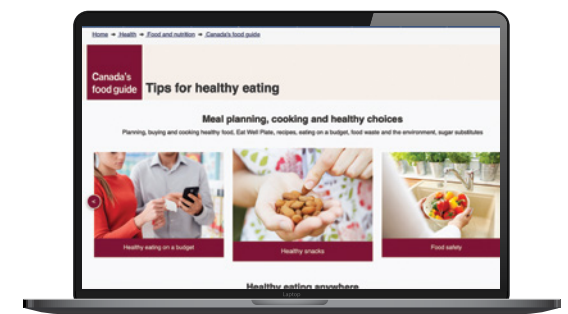
Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 1999
FY 2019/20 Shipments: 60 Million Pounds

CANADIANS LOVE ALMONDS

Almonds are well loved by Canadians, and in this market ABC focuses on public relations outreach, leveraging the work of the U.S. program. The goal of this program is to ensure almonds continue to be mentioned by the media, driving awareness and consumption of almonds as a snack.

HEALTH GUIDE FEATURE:

The latest food guide from the government of Canada prominently features almonds as a healthy snack. <https://food-guide.canada.ca/en/tips-for-healthy-eating/>



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>

GLOBAL MARKET DEVELOPMENT



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

Europe UK, GERMANY, FRANCE AND ITALY

MARKET SUMMARY

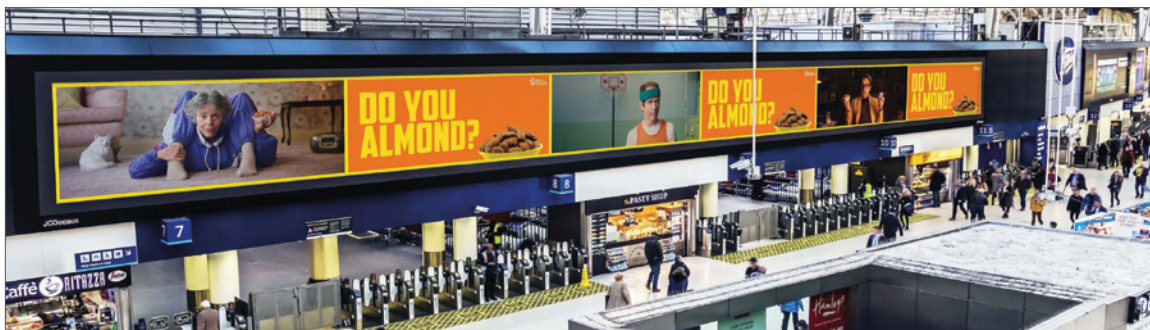
Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 2008
FY 2019/20 Shipments: 575 Million Pounds¹

PUTTING ALMONDS AT THE HEART OF HEALTHY EATING

As demand for healthy food in Europe grows, consumer expectations continue to evolve. Through our marketing programs, the Almond Board of California shows consumers why almonds should be their go-to choice: because they are healthy, tasty, natural and responsibly produced.



DO YOU ALMOND?: That is the question on everyone’s lips in the UK after the launch of our bold, new UK campaign in 2020. The fun campaign celebrates those who fuel with almonds, showing how almonds help keep them on their A-game, and in winter 2020 involved an advertising take-over in London’s busiest train stations. The “Do You Almond?” advertisements were featured on Europe’s largest digital billboard at London Waterloo station.



MOVING BEYOND TRADITIONAL USES: In a market where almonds have traditionally been linked to Christmas and marzipan, our Snack the California Sun campaign continues to show Germans how California almonds fit into their lives all year round. In addition to TV, YouTube and digital advertising, this year new and dynamic advertising on social media served to remind our audience of the rich but light energy-giving benefits of almonds, whatever the weather.



ACCEPTING HEALTHY SNACKING: France is a market where historically snacking has been considered a dirty word! Our research shows that our target audience is eating more almonds, and they believe snacking can be part of a healthy lifestyle. This year ABC continued to educate consumers about almonds’ multiple health benefits through public relations activity and health professional advocacy.

Decrypage

COMMISSIONE REGIONALE FOMI PER LE AMANDE DI CALIFORNIA

AMANDE DI CALIFORNIA

6 eccellenti ragioni di se mettere à l'amande

Les amandes, vous appréciez leur douceur et leur saveur... Mais connaissez-vous leurs pouvoirs extraordinaires? Découvrez avec les amandes de Californie.

DES SOINS DE BEAUTE A SAVOIR:
La beauté vient aussi de l'intérieur. La consommation quotidienne d'amandes contribue à la diminution des rides sénes une étude américaine qui souligne les effets positifs en protéines, lipides et lignane sur les rides des femmes ménopausées.

GARDER LA LIGNE:
Savoir que les amandes profitent à votre silhouette. Elles sont riches en fibres et contiennent moins de calories que les autres noix. Elles sont également riches en protéines, ce qui aide à contrôler l'appétit et à brûler plus de calories en même temps que le nombre de calories brûlées par les dépenses métaboliques.

PROTEGER SON CŒUR:
Une poignée d'amandes et tant de bienfaits. Elles favorisent l'augmentation de la bonne cholestérol et la réduction du mauvais cholestérol, les amandes diminuent significativement le risque de maladies cardiovasculaires. Avec une consommation régulière, bien sûr!



GRIGNOTER INTELLIGENT:
Bonne pour le corps et l'esprit, les amandes regorgent de nutriments, notamment de protéines végétales, de graisses saines et de fibres. Bonne pour la glycémie, les amandes de Californie sont produites par des cultivateurs responsables envers leur environnement.

RECHARGER LES BATTERIES:
Les amandes sont une source de bons lipides et de vitamines. Elles sont riches en magnésium qui contribue à réduire la fatigue et le stress. Un petit coup de pouce sain et gourmand pour affronter les événements professionnels et grandir de la journée et rester en forme contre les repas.

COMPTER 1,2,3
L'état pour être productif de bien travaillé, c'est de commencer une journée équilibrée de 28 g d'amandes. Elles vous aident à passer. Avec la référence 1,2,3 amandes: 1 pour 1 poignée, 2,3 amandes. Facile, non?

POUR EN SAVOIR PLUS, RENDEZ-VOUS SUR www.almonds.fr

LOOKING AHEAD TO FY21

In France, watch for the launch of a brand-new consumer advertising campaign in summer 2021.



IGNITING ENERGY: 2020 marks the second year in our newest EU market, and ABC’s award-winning Energy Recharge campaign is cutting through. Consumers crowned almonds as the #1 nut eaten as a snack, and #1 nut for health? Our TV, digital, paid social and public relations campaigns continue to position almonds as a healthy and tasty snack that naturally recharges your day, and also fuels Italians’ desire for food that is uncomplicated, good for you and tastes great!



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

GLOBAL MARKET DEVELOPMENT



#1 EXPORT DESTINATION FOR CALIFORNIA ALMONDS, UP BY 11% COMPARED TO THE PREVIOUS YEAR.

India

MARKET SUMMARY

Reaching: Consumers, Trade
Active Since: 2010
FY 2019/20 Shipments: 256 Million Pounds

SIGNIFICANT GROWTH POTENTIAL BY STRENGTHENING TRADITION


Almond consumption in India is steeped in centuries of tradition with mothers soaking and peeling almonds and giving them to their kids first thing in the morning. The marketing program reinforces this tradition while leveraging new opportunities like increasing consumption as a snack, driving beauty associations and communicating about immunity in the post-COVID world.

NEW FAMILY CONSUMPTION CAMPAIGN:

The program in India launched new television advertisements aimed at increasing the frequency of almond consumption among all family members. Leaning in on traditional usage, one advertisement reminds mothers to give almonds to their children while two other ads feature working professionals, reminding them to take care of themselves, too.



MARKETING AMIDST A PANDEMIC: The Almond Board of California (ABC) hosted its first virtual event for Indian media. The event focused on the importance of ensuring family health and nutrition amidst the ongoing pandemic. Panelists included leading Indian actress and mother Soha Ali Khan, well-known nutritionists Madhuri Ruia and Ritika Samaddar, and Emily Fleischmann, VP, Global Market Development, ABC.

ALMONDS ARE CONSIDERED THE TOP NUT FOR SNACKING AND CHOCOLATE ACCORDING TO CHINESE CONSUMERS.

China

MARKET SUMMARY

Reaching: Consumers, Food Professionals
Active Since: 1999
FY 2019/20 Shipments: 99 Million Pounds

MAKING PROGRESS ON CONSUMER PERCEPTIONS DESPITE TARIFF CHALLENGES

While the industry has seen an uneven trade landscape and reduced shipments to China, the market is still the 4th largest export market for California almonds. ABC continues to believe in the long-term growth potential in this market, and its marketing program aims to show consumers that almonds are a daily snack that delivers beauty from the inside out.

NEW ADVERTISING CAMPAIGN:

The Magic Hands campaign launched in late 2019 and ran in China throughout 2020. The playful campaign depicts “Magic Hands”—a.k.a. almonds—working to improve skin radiance while also showing the nut itself as being beautiful in all its forms (in-shell, almond blossoms, etc.). The campaign ran in Beijing, Shanghai and Guangzhou.



ENGAGING E-COMMERCE:

Traditional Chinese festivals are a big deal, and China’s e-commerce market is an even a bigger deal. In 2020, ABC leveraged two top festive seasons on the e-commerce platform Tmall—Chinese New Year in February and the Foodie Festival in May. ABC worked with Tmall to create a tailor-made campaign featuring California almonds. The campaign educated consumers on almonds’ skin beauty benefits and drove traffic to 15+ partner nut brands.



LEVERAGING BEAUTY INFLUENCERS: In late 2020, ABC hosted a live video session called *The Skin Experts* which featured several key influencers: two dermatologists, a nutritionist and a famous beauty blogger. The event leveraged their credibility and influence in skin health. The campaign is reaching millions of Chinese consumers online, giving them a reason to believe in the beauty power of California almonds.

GLOBAL MARKET DEVELOPMENT



SHIPMENTS CONTINUE TO INCREASE AT A STEADY RATE YEAR OVER YEAR, UP 5% COMPARED TO FY 2018/19.

Japan

MARKET SUMMARY

Reaching: Consumers, Trade
Program Relaunch: 2018
FY 2019/20 Shipments: 85 Million Pounds

A BEAUTIFUL LIFE WITH ALMONDS

For the Almond Board of California (ABC), a key measure of success is top-of-mind awareness of almonds. Last year in Japan this measure increased by 37% according to ABC's Global Perception Study.

CONSUMER FOCUS: This program in Japan was traditionally focused on trade education, but in 2020 the program shifted to launch a robust consumer public relations program. Communications aim to educate consumers on the beauty benefits of almonds.




#1 FAVORITE NUT ALMONDS RETAINED #1 POSITION OVER ALL OTHER NUTS FOR TOP-OF-MIND AWARENESS FOR THREE CONSECUTIVE YEARS.

South Korea

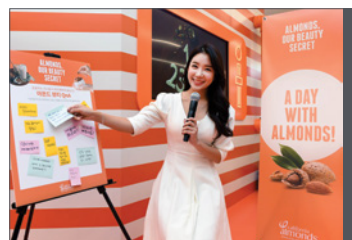
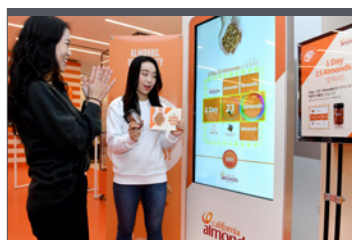
MARKET SUMMARY

Reaching: Consumers, Trade
Program Relaunch: 2018
FY 2019/20 Shipments: 56 Million Pounds

ALMONDS, THE PERFECT BEAUTY SNACK

In recent years, the way Koreans think about beauty has undergone a shift from focusing on external beauty to balancing inner and outer beauty. For the past three years, the Almond Board's marketing program has focused on this new trend by positioning almonds as an ideal beauty snack.

A DAY WITH ALMONDS: Prior to the COVID-19 lockdown in South Korea, ABC held an event to educate consumers about the beauty benefits and daily portion size of almonds. The event, which resulted in much media coverage and had a turnout of over 2,500 people, featured mini games, a Pilates class and the Beauty Talk Show.



ALMONDS ARE THE NUMBER ONE NUT CONSUMED AS AN INGREDIENT GLOBALLY.¹

Trade Marketing + Stewardship

PROGRAM SUMMARY

Reaching: Food Professionals
Active Since: 2012

ALMONDS' VERSATILITY IN THEIR MANY FORMS MAKES THEM A GO-TO FAVORITE FOR PRODUCT DEVELOPERS: Almonds fulfill many current and emerging consumer needs and desires. ABC's trade program educates and reinforces almond attributes around nutrition, versatility, consumer demand and sustainability. Advertising and public relations activities such as media outreach and trade events educate food professionals to help bring these key messages to life.

NEW ADVERTISING: In early 2020, the trade program launched a fresh, best-in-class advertising campaign positioning almonds as a versatile ingredient nut. The campaign runs globally across platforms including print, digital and social media.

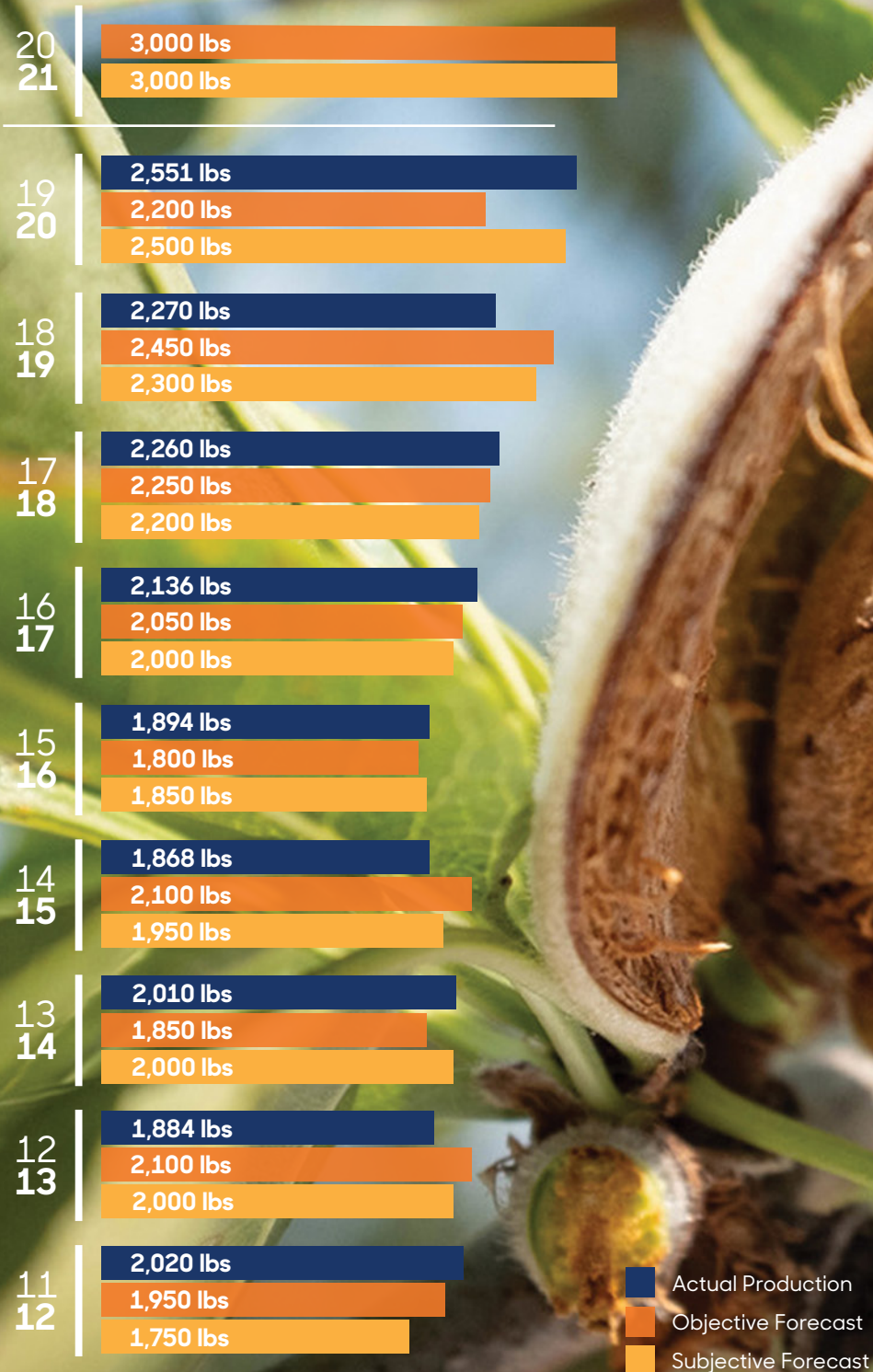
2020 ALMOND ORCHARD TOUR: In February, ABC hosted 18 sustainability professionals from 13 large snack manufacturers for a two-day bloom tour. ABC worked with farmers and research and sustainability partners to showcase how responsible almond farming practices meet many companies' sustainable sourcing targets.



1. Global Perceptions of Almonds, Sterling-Rice Group, 2019.

crop years 2011/12–2020/21 | million pounds

California Almond Forecasts vs. Actual Production



Sources: Almond Board of California. USDA-NASS California Field Office.

California Almond Crop Estimates vs. Actual Receipts

crop years 2001/02–2020/21 | million pounds

CROP YEAR	OBJECTIVE FORECAST	HANDLER RECEIPTS	LOSS AND EXEMPT	REDETERMINED MARKETABLE WEIGHT	LBS. REJECTS IN RECEIPTS
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	2,087.4	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	*	60.0 [†]	2,940.0	*

Sources: Almond Board of California. Objective forecast provided by USDA, NASS California Field Office. *Not available at time of publication. [†]Estimated.

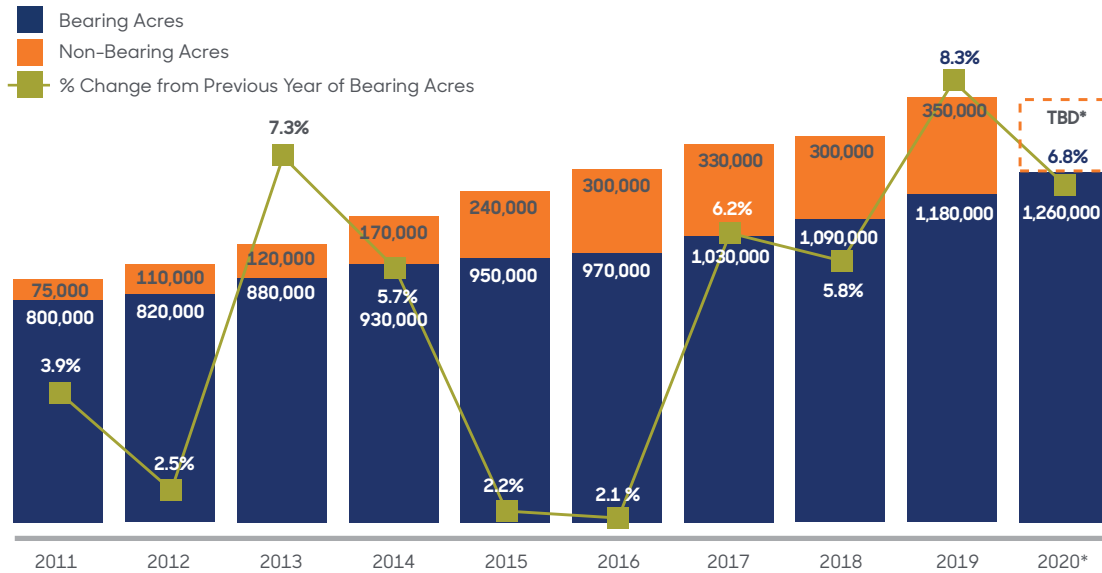
Did You Know?



Nearly **85%** of almond orchards use efficient microirrigation, far above the **42%** average for California farms overall.

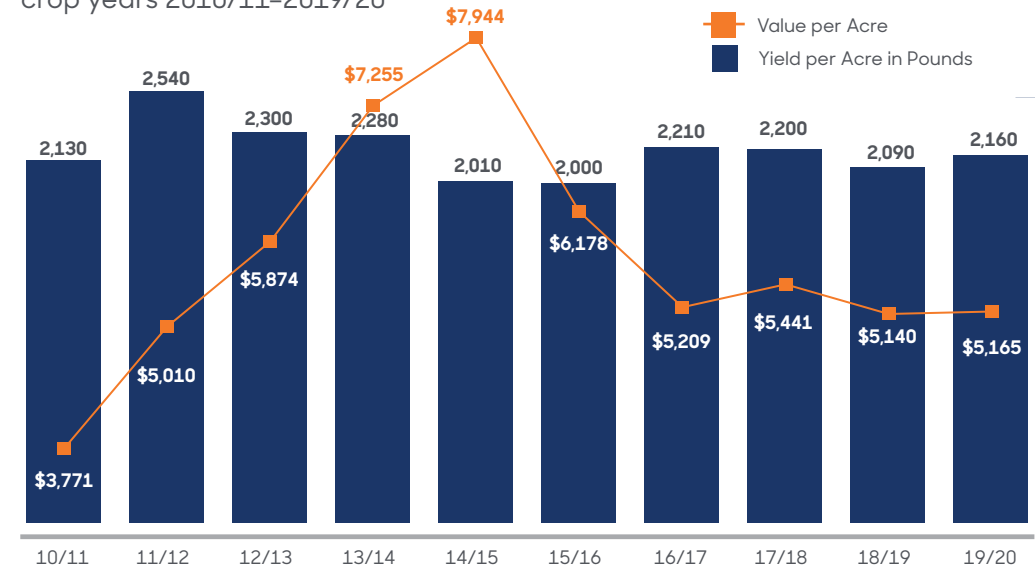
Sources: California Almond Sustainability Program. Nov. 2020. California Department of Water Resources. California Water Plan Update 2013: Volume 3, Chapter 2.

California Almond Acreage 2011-2020



Source: USDA Agricultural Statistics Service, Pacific Region (NASS/PR) 2020 Acreage Report.
*Estimate; non-bearing acreage for 2020 available in April 2021.

Crop Value + Yield per Bearing Acre crop years 2010/11-2019/20



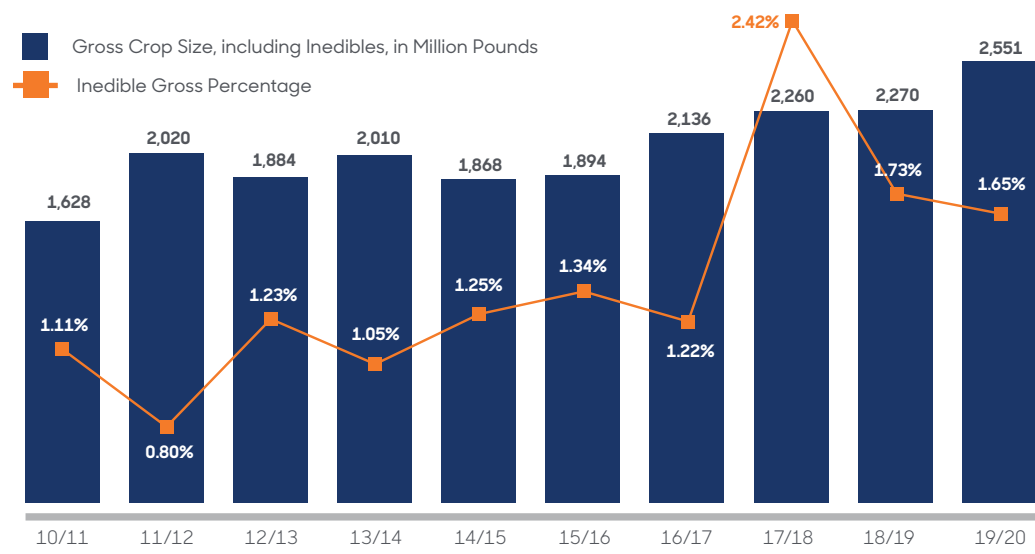
Source: USDA, NASS/PRO 2020 California Almond Objective Forecast.

California Almond Acreage + Farm Value crop years 2011/12-2020/21

CROP YEAR	ACREAGE IN ACRES				YIELD		VALUE IN DOLLARS			
	BEARING	NON-BEARING	TOTAL	NEW PLANTINGS	AVERAGE TREES PER ACRE	BEARING ACRE YIELD (LBS.)	PRODUCTION* (MILLION LBS.)	FARM PRICE	FARM VALUE (\$1,000)	VALUE PER BEARING ACRE
2011/12	800,000	75,000	875,000	30,732	111	2,540	2,020	\$1.99	\$4,007,860	\$5,010
2012/13	820,000	110,000	930,000	27,632	112	2,300	1,884	\$2.58	\$4,816,860	\$5,874
2013/14	880,000	120,000	1,000,000	29,772	112	2,280	2,010	\$3.21	\$6,384,690	\$7,255
2014/15	930,000	170,000	1,100,000	35,464	114	2,010	1,868	\$4.00	\$7,388,000	\$7,944
2015/16	950,000	240,000	1,190,000	42,824	114	2,000	1,894	\$3.13	\$5,868,750	\$6,178
2016/17	970,000	300,000	1,270,000	37,575	116	2,210	2,136	\$2.39	\$5,052,460	\$5,209
2017/18	1,030,000	330,000	1,360,000	33,421	117	2,200	2,260	\$2.53	\$5,603,950	\$5,441
2018/19	1,090,000	300,000	1,390,000	26,261	119	2,090	2,270	\$2.50	\$5,602,500	\$5,140
2019/20	1,180,000	350,000	1,530,000	16,924	122	2,160	2,551	\$2.43	\$6,094,440	\$5,165
2020/21*	1,260,000	‡	‡	‡	122	2,380	3,000	\$	\$	\$

Source: USDA, NASS/PRO. Note: Almond Board does not track prices. *Production numbers provided by Almond Board of California.
†Estimated as of July 7, 2020. ‡Acreage statistics will be available in April 2021. §Value statistics will be available in July 2021.

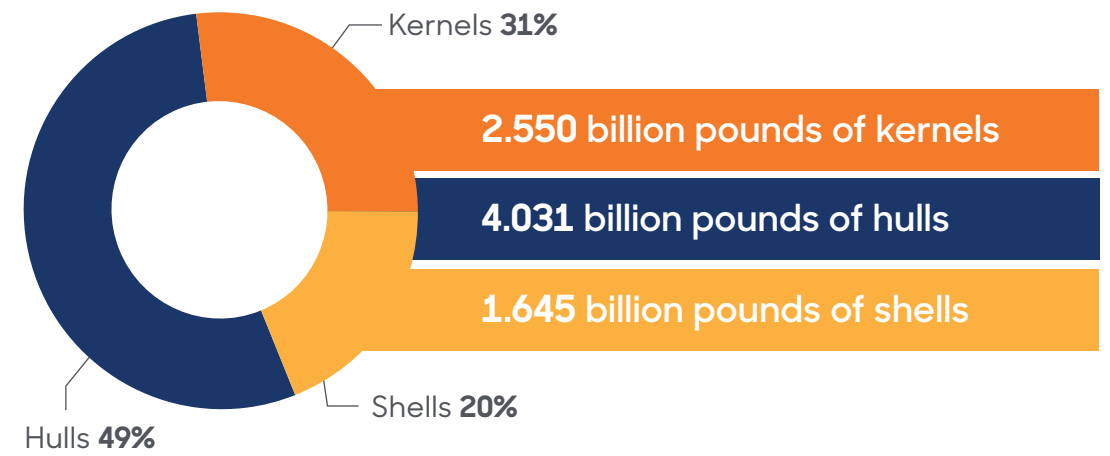
California Almond Crop-Size History + Inedible Percentage crop years 2010/11-2019/20



Source: Almond Board of California.



Almond Tree Fruit Weight crop year 2019/20



Sources: Kernel Weight—USDA Incomings received by Almond Board of California. Shell & Hull Estimations—Varietal Coproduct Ratios and Production Volumes (Almond Board of California 2020).

California Almond Production by County

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

	BUTTE	COLUSA	GLENN	SOLANO	SUTTER	TEHAMA	YOLO	MERCED	SAN JOAQUIN	STANISLAUS	FRESNO	KERN	KINGS	MADERA	TULARE	ALL OTHERS	TOTAL
	NORTHERN							CENTRAL			SOUTHERN						
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
2019/20	43.2	113.6	63.5	14.5	10.4	18.4	55.8	223.4	124.4	302.3	598.3	491.7	68.8	298.9	116.4	6.8	2,550.2

Source: USDA Form FV193, Report of Inedible Content of Almond Receipts. Counties with production less than 2 million pounds are aggregated under All Others. Totals may not add precisely due to rounding.

California Almond Receipts by County + Variety

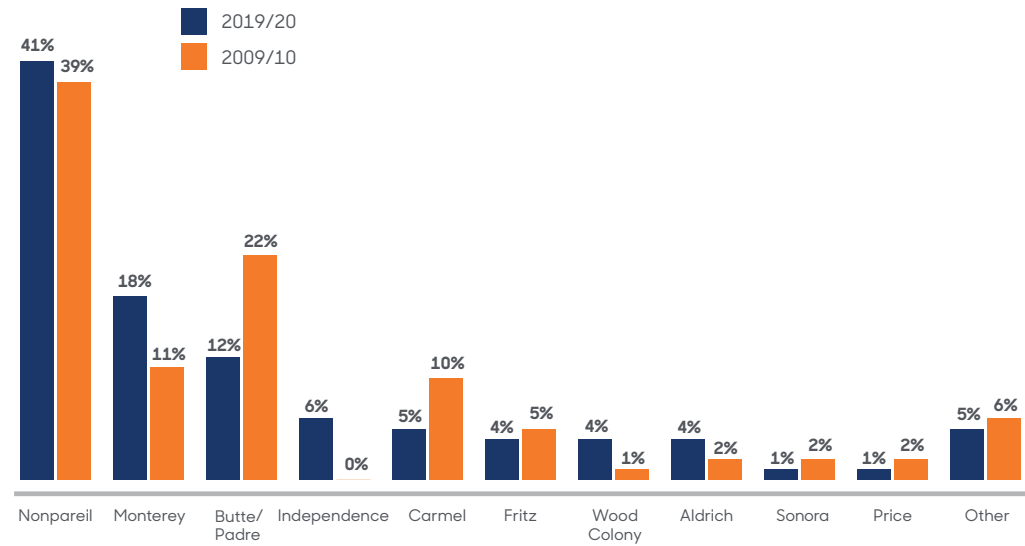
crop year 2019/20 | in pounds

COUNTIES	% CROP	NONPAREIL	BUTTE/PADRE	MONTEREY	CARMEL	FRITZ	INDEPENDENCE	ALL OTHERS	ALL VARIETIES
NORTHERN									
BUTTE	1.7%	18,545,081	5,588,772	2,469,327	3,597,309	427,354	742,701	11,848,888	43,219,432
COLUSA	4.5%	49,549,474	14,950,562	12,463,575	10,413,735	6,678,393	1,943,419	17,589,092	113,588,250
GLENN	2.5%	30,338,073	8,645,877	3,731,450	6,963,756	940,892	289,428	12,547,123	63,456,599
SOLANO	0.6%	5,678,602	1,158,372	1,037,010	513,556	6,563	3,700,495	2,454,156	14,548,754
SUTTER	0.4%	3,758,800	1,351,173	1,355,349	498,032	68,126	641,881	2,678,711	10,352,072
TEHAMA	0.7%	9,410,351	2,558,904	1,034,756	2,098,861	973	131,017	3,128,831	18,363,693
YOLO	2.2%	23,840,576	4,816,927	8,284,854	4,032,298	682,506	2,826,627	11,310,558	55,794,346
YUBA	0.1%	525,055	22,841	102,193	46,184	23,145	310,562	279,692	1,309,672
OTHERS	0.1%	1,608,572	117,315	465,695	130,226	2,474	281,689	499,402	3,105,373
TOTALS:	12.7%	143,254,584	39,210,743	30,944,209	28,293,957	8,830,426	10,867,819	62,336,453	323,738,191
CENTRAL									
MERCED	8.8%	87,876,955	27,629,953	30,219,887	15,633,748	8,504,370	16,689,424	36,848,972	223,403,309
SAN JOAQUIN	4.9%	48,377,164	11,992,478	6,885,446	13,338,215	4,254,330	20,224,844	19,298,633	124,371,110
STANISLAUS	11.9%	112,897,528	35,106,845	25,229,423	31,221,900	10,645,975	32,443,393	54,715,552	302,260,616
OTHERS	0.1%	539,061	9,031	184,526	137,388	0	636,463	40,375	1,546,844
TOTALS:	25.6%	249,690,708	74,738,307	62,519,282	60,331,251	23,404,675	69,994,124	110,903,532	651,581,879
SOUTHERN									
FRESNO	23.5%	248,845,539	75,435,794	125,952,948	10,354,928	20,184,452	32,021,754	85,500,226	598,295,641
KERN	19.3%	206,939,659	57,874,465	129,222,875	9,138,066	38,413,514	12,814,349	37,296,625	491,699,553
KINGS	2.7%	24,338,394	9,056,036	16,428,678	124,008	1,951,302	9,759,024	7,135,161	68,792,603
MADERA	11.7%	128,480,897	30,482,499	64,455,763	10,370,660	11,301,712	6,359,870	47,407,752	298,859,153
TULARE	4.6%	47,405,826	8,080,163	28,008,524	1,165,887	6,273,628	15,568,838	9,901,181	116,404,047
OTHERS	0.0%	381,215	86,154	224,063	3,608	19,717	0	85,169	799,926
TOTALS:	61.8%	656,391,530	181,015,111	364,292,851	31,157,157	78,144,325	76,523,835	187,326,114	1,574,850,923
GRAND TOTAL	100.0%	1,049,336,822	294,964,161	457,756,342	119,782,365	110,379,426	157,385,778	360,566,099	2,550,170,993

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

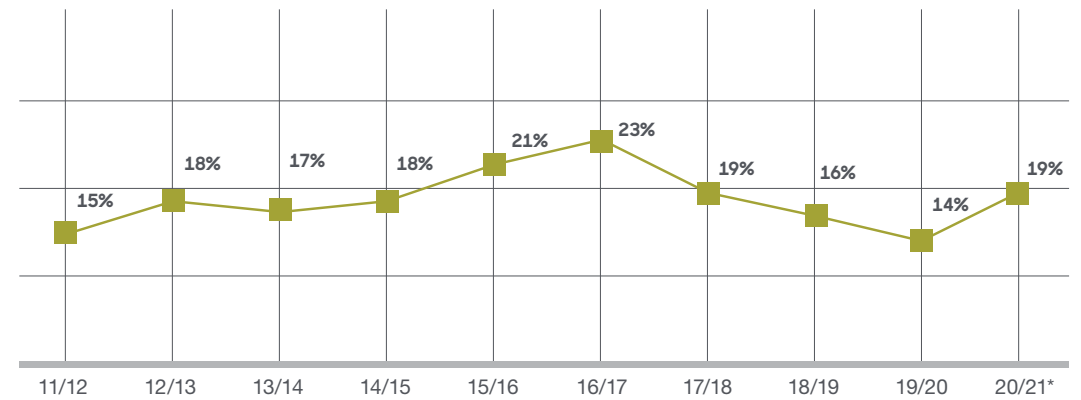
crop years 2009/10 vs. 2019/20



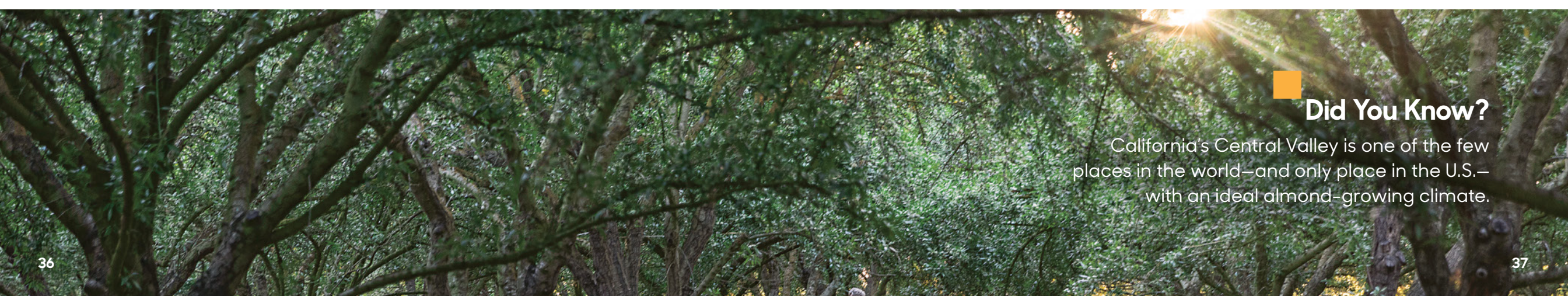
Source: USDA Incoming Receipts. Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre. Totals may not add precisely due to rounding.

Carry-In as a Percentage of Prior Year Shipments

crop years 2011/12–2020/21



Source: Almond Board of California. *Forecasted.

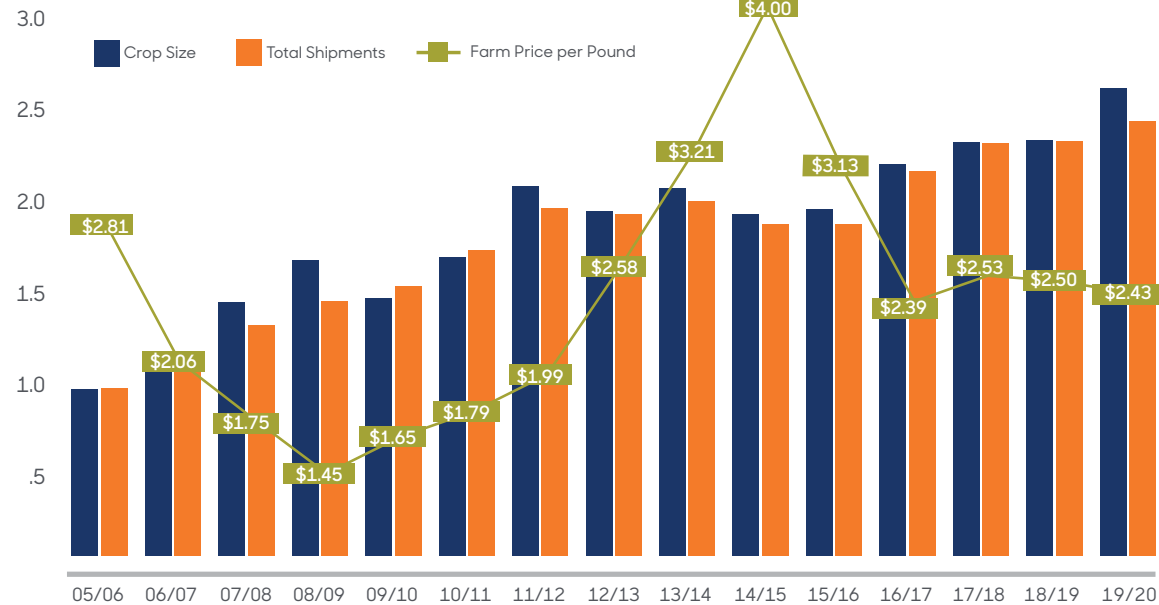


Did You Know?

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 2005/06–2019/20 | billion pounds



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

Position Report of California Almonds

crop years 2011/12–2020/21 | million pounds

CROP YEAR	REDETERMINED MARKETABLE WEIGHT	CARRY/IN	RESERVE	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS	TOTAL SHIPMENTS	SALABLE CARRYOVER
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	1,970.0	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*	2,940.0	450.1	N/A	3,390.1	916.8	1,948.3	2,865.1	525.0

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

World Destinations crop years 2015/16–2019/20 | million pounds

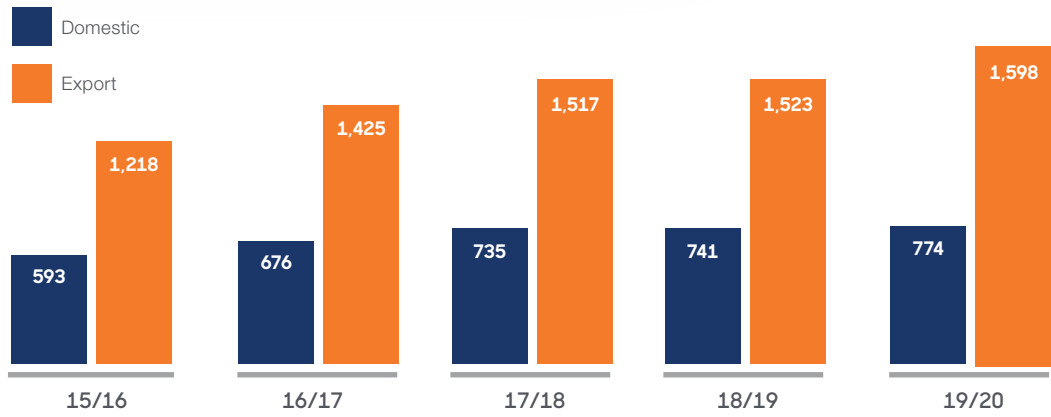
Destination	2015/16	2016/17	2017/18	2018/19	2019/20
Americas					
North America					
Canada	44.65	55.51	58.30	60.52	59.59
Mexico	17.42	18.47	22.17	23.55	24.23
TOTAL NORTH AMERICA	62.12	73.98	80.50	84.08	83.85
Latin America/Caribbean					
Argentina	0.51	1.64	2.31	0.35	1.40
Brazil	1.24	2.67	3.81	2.46	4.97
Chile	3.93	7.27	6.50	5.40	7.30
Colombia	1.75	2.25	3.44	3.51	5.17
Costa Rica	0.69	0.66	0.81	1.08	1.29
Peru	0.97	1.81	2.11	1.59	3.20
Trinidad	0.56	0.38	0.69	0.68	0.60
TOTAL LATIN AMERICA/CARIBBEAN	10.36	17.35	20.88	16.88	24.97
TOTAL AMERICAS	72.48	91.34	101.38	100.96	108.83
Asia-Pacific					
Northeast Asia					
China/Hong Kong	141.66	150.77	169.78	128.09	98.55
Japan	61.31	71.15	78.80	81.28	84.95
South Korea	46.23	54.45	50.84	56.92	56.10
Taiwan	9.33	11.46	9.61	9.34	9.95
TOTAL NORTHEAST ASIA	258.53	287.93	309.04	275.63	249.55
Southeast Asia					
Indonesia	2.81	2.63	3.38	4.63	4.26
Malaysia	6.37	5.62	7.02	9.34	8.68
Philippines	0.44	0.72	0.49	0.56	0.55
Singapore	3.33	3.57	4.08	3.85	4.14
Thailand	4.12	3.97	5.19	7.33	8.25
Vietnam	22.12	42.59	55.17	57.23	14.38
TOTAL SOUTHEAST ASIA	39.25	59.15	75.35	83.02	40.36
South/Central Asia					
Afghanistan	0.00	0.00	1.38	2.27	2.83
India	126.45	167.08	199.52	231.35	255.77
Kazakhstan	0.26	0.96	7.77	7.87	8.92
Nepal	0.19	0.29	0.15	0.54	0.96
Pakistan	12.81	20.80	11.82	9.69	10.18
TOTAL SOUTH/CENTRAL ASIA	140.10	193.44	221.83	251.88	279.15
Australasia/Oceania					
Australia	2.77	3.54	3.82	5.73	3.32
New Zealand	3.80	3.29	3.36	3.70	3.93
TOTAL AUSTRALASIA/OCEANIA	6.58	6.84	7.21	9.46	7.34
TOTAL ASIA-PACIFIC	444.45	547.36	613.45	620.00	576.39
Europe					
Western Europe					
Belgium	20.12	19.50	20.76	24.53	22.32
Denmark	7.28	7.42	8.23	7.48	7.55
France	23.25	27.83	29.21	30.02	30.52
Germany	102.81	130.21	134.33	110.46	133.93
Greece	7.80	9.02	10.27	11.40	12.16
Ireland	0.71	0.55	0.60	0.64	0.74
Italy	57.72	58.14	68.38	67.06	76.67
Netherlands	46.84	51.51	52.04	72.19	73.76
Norway	6.56	5.44	6.43	5.60	7.03
Portugal	1.43	1.77	2.46	1.99	1.54
Spain	201.10	210.63	203.36	195.64	192.56
Sweden	6.70	5.66	7.31	7.20	7.76
Switzerland	7.90	3.60	4.82	5.01	2.23
United Kingdom	32.45	34.37	34.08	32.60	34.14
TOTAL WESTERN EUROPE	523.31	566.45	583.04	572.65	603.43
Central/Eastern Europe					
Bulgaria	1.86	2.11	2.19	2.24	2.88
Croatia	1.13	1.87	2.15	3.03	4.47
Czech Republic	1.41	2.11	1.84	1.80	1.89
Estonia	3.85	6.28	11.45	8.54	12.26
Georgia	0.13	0.25	0.22	1.38	2.09
Latvia	0.62	1.55	5.52	2.51	1.57
Lithuania	1.80	3.23	4.22	4.79	6.07
Poland	1.82	2.93	3.83	4.39	3.98
Russia	0.44	1.15	1.34	1.75	0.86
Serbia	0.40	0.34	0.26	0.26	0.54
Ukraine	0.53	0.77	1.75	2.84	3.90
TOTAL CENTRAL/EASTERN EUROPE	15.97	25.65	36.91	35.43	42.50
TOTAL EUROPE	539.28	592.10	619.95	608.08	645.93
Middle East/Africa					
Middle East					
Bahrain	0.94	1.15	1.50	1.69	1.73
Cyprus	1.06	1.12	1.21	1.22	1.29
Iraq	0.50	1.11	0.96	1.24	1.22
Israel	8.72	10.49	8.75	11.53	14.51
Jordan	8.60	10.17	9.49	11.40	12.62
Kuwait	3.62	4.27	3.72	4.87	3.36
Lebanon	6.76	5.46	6.35	7.45	3.96
Oman	0.04	0.04	0.18	0.15	0.53
Qatar	0.39	1.12	2.10	2.92	2.21
Saudi Arabia	14.19	20.83	14.74	20.27	23.15
Turkey	37.15	53.46	51.74	36.14	61.38
United Arab Emirates	57.32	64.37	63.54	69.01	86.32
TOTAL MIDDLE EAST	139.37	173.59	164.28	167.92	212.29
North Africa					
Algeria	8.33	9.93	5.28	7.58	9.74
Egypt	5.73	1.91	2.25	4.08	7.51
Libya	0.65	0.41	0.39	0.84	2.16
Morocco	0.01	1.10	3.66	7.12	28.06
Tunisia	3.02	1.22	0.25	0.34	0.67
TOTAL NORTH AFRICA	17.74	14.58	11.84	19.96	48.15
Sub-Saharan Africa					
South Africa	4.47	5.57	5.68	5.56	6.12
TOTAL SUB-SAHARAN AFRICA	4.73	5.87	5.89	5.93	6.57
TOTAL MIDDLE EAST/AFRICA	161.83	194.04	182.01	193.81	267.01
Total Shipments					
TOTAL EXPORT SHIPMENTS	1218.05	1424.83	1516.79	1522.85	1598.16
TOTAL U.S. SHIPMENTS	593.19	675.96	734.73	741.17	774.25
TOTAL GLOBAL SHIPMENTS	1811.24	2100.79	2251.52	2264.02	2372.41

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 2019/20 are listed.



Domestic + Export Shipments

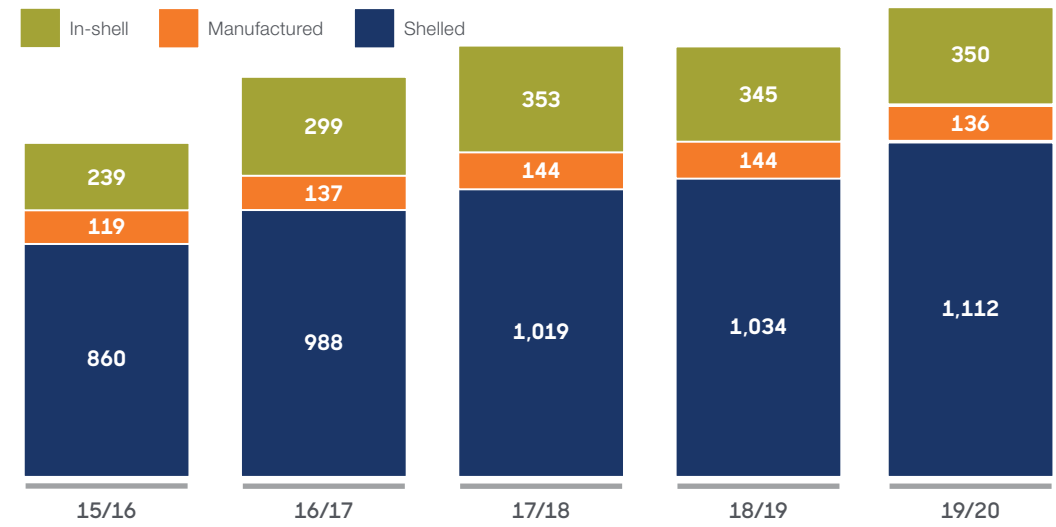
crop years 2015/16–2019/20 | million pounds



Source: Almond Board of California.

Export Shipments by Product Type

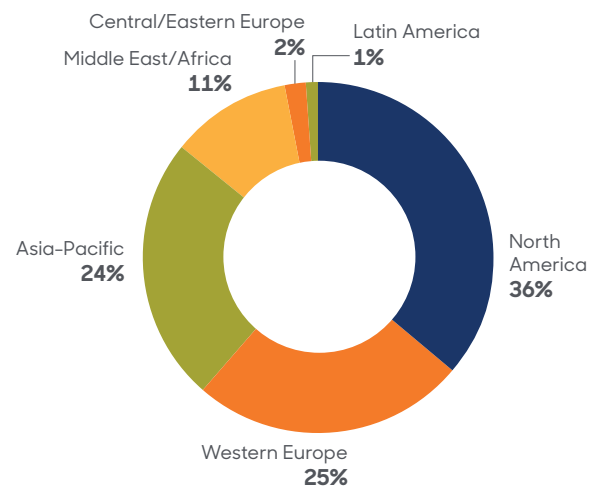
crop years 2015/16–2019/20 | million pounds



Source: Almond Board of California.

Shipments by Region

crop year 2019/20



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

Top Global Destinations

crop year 2019/20 | million pounds



Source: Almond Board of California July 2020 Position Report.

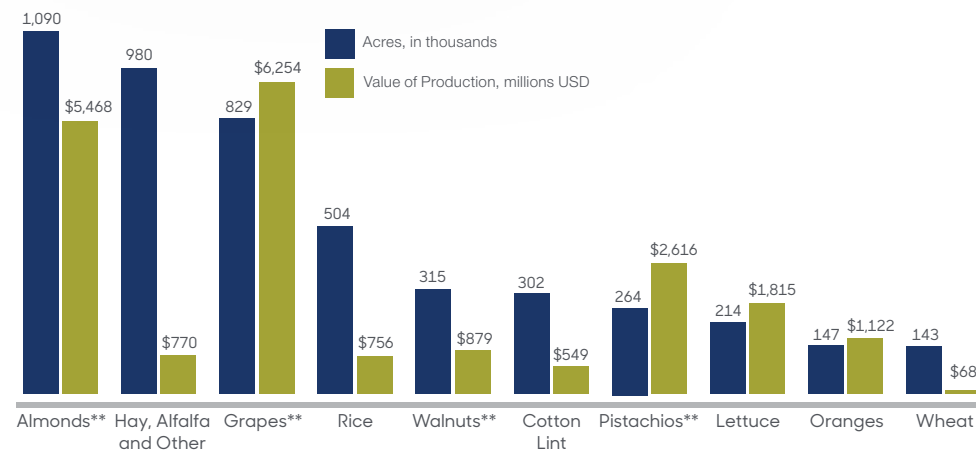


Did You Know?

Water-saving technologies like microirrigation helped farmers **reduce the amount of water** it takes to grow each pound of almonds by 33% between the 1990s and 2010s¹

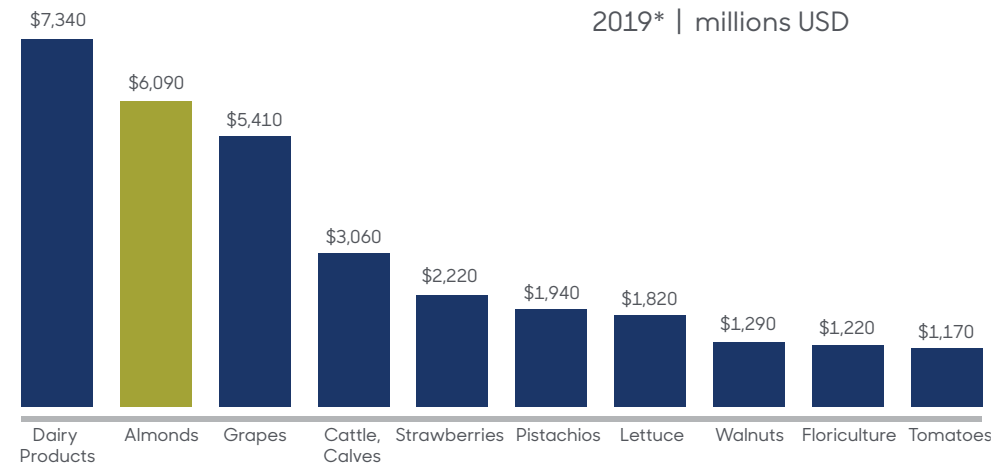
¹ University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990–94, 2000–14.

Top Ten California Crop Acreage 2018*



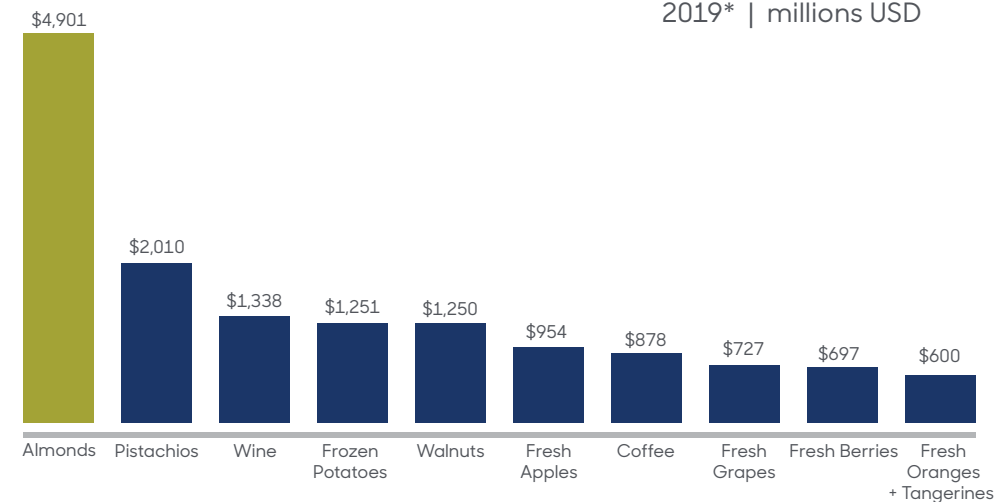
Source: CDFA, California Agricultural Statistics Review.
*Calendar year January through December 2018. Value based on farm-gate prices. **Bearing acreage.

California's Top Ten Valued Commodities 2019* | millions USD



Source: California Department of Food and Agriculture: California Agricultural Production Statistics. <https://www.cdфа.ca.gov/Statistics>.
*Calendar year January through December 2019.

Top Ten U.S. Specialty Crop Exports by Value 2019* | millions USD



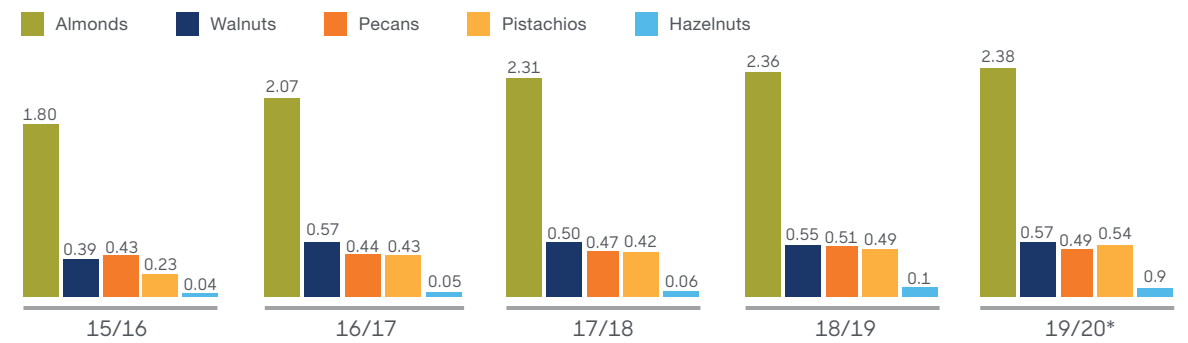
Source: USDA Foreign Agricultural Services Global Agricultural Trade System. *Calendar year January through December 2019.



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 2015/16–2019/20 | pounds per capita



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

U.S. Production + Imports of Competing Nuts crop years 2010/11–2019/20 | 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
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	89.4	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	86.1	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	111.1	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	112.5	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	133.8	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	155.5	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	137.6	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	171.9	3,233.5	738.8
2018/19	2,269.6	32.3	598.8	2.6	40.8	16.8	104.5	166.0	487.5	1.3	16.0	256.0	3,517.1	720.2
2019/20*	2,551.2	26.3	574.9	2.7	35.2	13.5	134.7	157.7	356.9	1.6	18.5	207.5	3,671.4	694.6

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. *Preliminary.

Doing More Through Collaboration



Since 2013, the Almond Board of California and Almond Alliance of California have worked together to provide the California almond industry with a voice, expanding opportunities to advocate for industry priorities and encouraging support among those who are making decisions that impact how almonds are grown and sold. In 2020, we worked together to address the impacts of COVID-19 and continued tackling issues facing the industry, such as trade wars, pesticide regulations, water availability and more.

CORONAVIRUS FOOD ASSISTANCE PROGRAM (CFAP)

In April, USDA announced an \$18 billion Coronavirus Food Assistance Program (CFAP), providing direct support to agriculture producers based on losses where prices and market supply chains were significantly impacted by the pandemic. After the Almond Alliance's success in ensuring almonds were included, the Alliance and ABC collaborated with USDA's FSA to help farmers participate in CFAP. Three webinars were held as part of an outreach and education effort. By the close of the program, California almond farmers received over \$1 million in direct payments.

CORONAVIRUS FOOD ASSISTANCE PROGRAM 2 (CFAP 2)

In September, USDA announced a second program with an additional \$14 billion dollars for producers who continue to face market disruptions and associated costs because of COVID-19. Again, ABC and the Almond Alliance, together with FSA, ensured farmers would be in a good position to apply for CFAP 2.



LOOKING TO 2021

Following the 2020 election process, the Almond Board and Almond Alliance will be **focused on educating new policy makers on the goals and contributions of California almonds** and the role they play in California, the U.S. and around the world.

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 Almond Board of California (ABC) programs



Growing Good

Overview of the responsible practices used to grow California almonds
Almonds.com/GrowingGood



2025 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 for farmers and processors to receive updates on industry research, production news and regulatory issues. Presentations from past TAC events can be found at Almonds.com/TACpresentations
Save the date: December 7-9, 2021
AlmondConference.com



Industry Resource Directory

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



Almond Living Magazine

A digital magazine housing articles that touch on various ABC initiatives. This is a great place to see firsthand how ABC is connecting with consumers and food and health professionals
Almonds.com/Magazine



Press Room

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



Twitter

Almond sustainability news served up in 280 characters
@almondboard



Facebook

A place for almond farmers and processors to stay in touch with ABC
@AlmondBoardofCalifornia



YouTube

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



LinkedIn

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



Questions? Collateral requests? Contact ABC:

inquiries@almondboard.com
209.549.8262



Almond Board of California

1150 Ninth Street, Suite 1500
Modesto, CA 95354
T: 209.549.8262 | F: 209.549.8267
Almonds.com

Document #2020IR0296

© 2020 Almond Board of California