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.

INTRODUCTION

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 imaging.

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 25% 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.

$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 COMMITTS 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 COMMITTS 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, COMMITTS 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**
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.

FARMERS

Distribution of Crop by Handler Size
crop year 2018/19

派遣加州杏仁的公司数量和所处理的杏仁比例

Number of Handlers
Percentage of Crop Handled

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.

Source: International Nut and Dried Fruit Council.
ACTUAL 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.

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: 105
For more on almond quality and safety, see page 16.

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.

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 Working Group.
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.

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

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

### 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.

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**ALMOND BOARD PROGRAMS**

**DOING MORE WITH LESS**

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

**WATER-SAVING TECHNOLOGIES**

Like microirrigation have helped farmers reduce the amount of water used to grow each pound of almonds by over the past 20 years.

**NEARLY 80%**

Since 1992, ABC has funded 221 water research projects.

**REDUCE**

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

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**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.

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**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 health and helps to address climate change.

Models show that recycling the orchard sequesters 2.4 tons of carbon per acre, equivalent to living car-free for a year.

**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. 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.

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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: 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.

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.


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
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:

- **India**
  - Retaliatory tariffs on U.S. almonds at 42 rupees per kilogram inshell and 120 rupees per kilogram kernel
  - Engaged with Indian government over labeling, Goods and Services Tax (GST)
  - Coalitions focusing on phytosanitary certificates requirement instituted
  - Commented on FDA standards of identity for plant-based products

- **China**
  - 60% retaliatory tariff on U.S. kernel and inshell almonds
  - Collaborated with Chinese industry regarding tariff exclusion
  - Engaged with Indian government over labeling, Goods and Services Tax (GST)

- **Japan**
  - Limited trade agreement, bringing tariffs on U.S. almonds to 0%
  - Strategized with U.S. government to address aflatoxin rejections

- **EU**
  - Reapplied <1% import controls for almonds under the Pre-Export Check (PEC) program
  - Harmonization of FDA goods returned and reconditioning procedures
  - Incentives to help growers afford new technologies

- **US**
  - Retaliatory tariffs on U.S. almonds at 42 rupees per kilogram inshell and 120 rupees per kilogram kernel
  - Engaged with Indian government over labeling, Goods and Services Tax (GST)
  - Commented on FDA standards of identity for plant-based products

- **Phytosanitary certificates**
  - Requirement instituted

- **Coalition**
  - Focusing on pesticide MRLs

*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.

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 COMMUNICATIONS**

**NEWSPAPERS**

**SPECIAL EVENTS + PROGRAMS**

**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.

**INDUSTRY RELATIONS**

**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.

**SUSTAINABILITY COMMUNICATIONS**

**WORKSHOPS**

**Navigating the Waters**

The Almond Board hosted 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.1

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.

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%).1

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.2

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.

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

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.

U.S. Shipments Hit a Record 741 Million Pounds, Once Again Making It The #1 Global Destination.

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

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.

“I Ponte 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 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 Pounds

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

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.

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.

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.

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.

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.”

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.

South Korea

**Market Summary**
- **Reaching:** Consumers, Trade
- **Active since:** 2011
- **FY 2018/19 Shipments:** 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
- **Active since:** 2011
- **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.

## Objective Forecast vs. Subjective Forecast vs. Actual Production

### California Almond Forecasts vs. Actual Production

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Objective Forecast</th>
<th>Subjective Forecast</th>
<th>Actual Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/11</td>
<td>2,450 lbs</td>
<td>2,300 lbs</td>
<td>2,270 lbs</td>
</tr>
<tr>
<td>2011/12</td>
<td>2,200 lbs</td>
<td>2,136 lbs</td>
<td>2,200 lbs</td>
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<tr>
<td>2012/13</td>
<td>2,050 lbs</td>
<td>1,984 lbs</td>
<td>1,850 lbs</td>
</tr>
<tr>
<td>2013/14</td>
<td>2,000 lbs</td>
<td>1,950 lbs</td>
<td>1,868 lbs</td>
</tr>
<tr>
<td>2014/15</td>
<td>1,950 lbs</td>
<td>1,884 lbs</td>
<td>1,850 lbs</td>
</tr>
<tr>
<td>2015/16</td>
<td>1,900 lbs</td>
<td>1,800 lbs</td>
<td>1,800 lbs</td>
</tr>
<tr>
<td>2016/17</td>
<td>1,850 lbs</td>
<td>1,750 lbs</td>
<td>1,850 lbs</td>
</tr>
<tr>
<td>2017/18</td>
<td>1,820 lbs</td>
<td>1,650 lbs</td>
<td>1,628 lbs</td>
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<tr>
<td>2018/19</td>
<td>1,750 lbs</td>
<td>1,530 lbs</td>
<td>1,580 lbs</td>
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</table>

### California Almond Crop Estimates vs. Actual Receipts

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Objective Forecast</th>
<th>Handler Receipts</th>
<th>Loss and Exempt</th>
<th>Redetermined Marketable Weight</th>
<th>Lbs. Rejects in Receipts</th>
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<tbody>
<tr>
<td>2000/01</td>
<td>640.0</td>
<td>698.4</td>
<td>26.0</td>
<td>672.4</td>
<td>15.7</td>
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<td>2001/02</td>
<td>850.0</td>
<td>824.1</td>
<td>29.3</td>
<td>794.8</td>
<td>16.7</td>
</tr>
<tr>
<td>2002/03</td>
<td>980.0</td>
<td>1,083.7</td>
<td>20.2</td>
<td>1,063.5</td>
<td>8.2</td>
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<tr>
<td>2003/04</td>
<td>1,000.0</td>
<td>1,032.9</td>
<td>21.8</td>
<td>1,011.1</td>
<td>19.8</td>
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<tr>
<td>2004/05</td>
<td>1,080.0</td>
<td>998.0</td>
<td>25.2</td>
<td>972.8</td>
<td>14.5</td>
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<tr>
<td>2005/06</td>
<td>880.0</td>
<td>911.7</td>
<td>23.0</td>
<td>888.7</td>
<td>16.0</td>
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<tr>
<td>2006/07</td>
<td>1,050.0</td>
<td>1,116.7</td>
<td>28.9</td>
<td>1,087.8</td>
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<td>2007/08</td>
<td>1,330.0</td>
<td>1,383.0</td>
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<td>1,358.3</td>
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<td>2008/09</td>
<td>1,500.0</td>
<td>1,614.6</td>
<td>42.7</td>
<td>1,571.9</td>
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<td>2009/10</td>
<td>1,350.0</td>
<td>1,405.9</td>
<td>26.9</td>
<td>1,379.0</td>
<td>19.6</td>
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<tr>
<td>2010/11</td>
<td>1,650.0</td>
<td>1,628.2</td>
<td>27.9</td>
<td>1,660.3</td>
<td>18.1</td>
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<td>2011/12</td>
<td>1,950.0</td>
<td>2,020.4</td>
<td>40.5</td>
<td>1,979.9</td>
<td>16.1</td>
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<tr>
<td>2012/13</td>
<td>2,100.0</td>
<td>1,884.0</td>
<td>35.6</td>
<td>1,848.4</td>
<td>23.1</td>
</tr>
<tr>
<td>2013/14</td>
<td>1,850.0</td>
<td>2,009.7</td>
<td>39.0</td>
<td>1,970.7</td>
<td>21.0</td>
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<tr>
<td>2014/15</td>
<td>2,100.0</td>
<td>1,867.9</td>
<td>29.3</td>
<td>1,838.6</td>
<td>23.4</td>
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<tr>
<td>2015/16</td>
<td>1,800.0</td>
<td>1,894.4</td>
<td>47.8</td>
<td>1,846.6</td>
<td>25.3</td>
</tr>
<tr>
<td>2016/17</td>
<td>2,050.0</td>
<td>2,135.7</td>
<td>48.3</td>
<td>2,087.5</td>
<td>26.0</td>
</tr>
<tr>
<td>2017/18</td>
<td>2,250.0</td>
<td>2,265.5</td>
<td>48.6</td>
<td>2,211.9</td>
<td>54.8</td>
</tr>
<tr>
<td>2018/19</td>
<td>2,450.0</td>
<td>2,269.6</td>
<td>46.2</td>
<td>2,233.3</td>
<td>39.3</td>
</tr>
<tr>
<td>2019/20</td>
<td>2,200.0</td>
<td>*</td>
<td>44.0†</td>
<td>2,156.0</td>
<td>*</td>
</tr>
</tbody>
</table>

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


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.

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.

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

California Almond Receipts by County + Variety

crop year 2018/19 | in pounds

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>% CROP</th>
<th>NONPAREIL BUTTE/Padre</th>
<th>MONTEREY</th>
<th>CARMELO</th>
<th>FRITZ</th>
<th>INDEPENDENCE</th>
<th>ALL OTHERS</th>
<th>ALL VARIETIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTHERN</td>
<td>BUTTE</td>
<td>2.5%</td>
<td>50,765,827</td>
<td>6,147,883</td>
<td>3,343,233</td>
<td>4,367,393</td>
<td>651,268</td>
<td>1,666,944</td>
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<tr>
<td>COLUSA</td>
<td>4.1%</td>
<td>63,429,846</td>
<td>13,943,654</td>
<td>13,653,698</td>
<td>6,147,194</td>
<td>1,120,315</td>
<td>34,697,714</td>
<td>76,792,611</td>
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<tr>
<td>GLEN</td>
<td>3.2%</td>
<td>8,706,536</td>
<td>9,180,052</td>
<td>6,445,078</td>
<td>6,625,007</td>
<td>897,702</td>
<td>106,449</td>
<td>12,456,394</td>
</tr>
<tr>
<td>SOLANO</td>
<td>1.0%</td>
<td>4,223,014</td>
<td>1,297,243</td>
<td>1,042,062</td>
<td>511,587</td>
<td>0</td>
<td>2,699,887</td>
<td>1,491,230</td>
</tr>
<tr>
<td>SUTTER</td>
<td>0.4%</td>
<td>3,152,561</td>
<td>1,542,573</td>
<td>1,199,692</td>
<td>530,987</td>
<td>24,929</td>
<td>410,543</td>
<td>2,130,911</td>
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<tr>
<td>TEHAMA</td>
<td>0.7%</td>
<td>8,467,042</td>
<td>2,463,762</td>
<td>853,076</td>
<td>1,723,005</td>
<td>0</td>
<td>32,703</td>
<td>2,689,667</td>
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<tr>
<td>YOLO</td>
<td>1.7%</td>
<td>17,707,044</td>
<td>4,837,772</td>
<td>6,295,884</td>
<td>2,169,046</td>
<td>780,054</td>
<td>1,741,921</td>
<td>5,900,089</td>
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<tr>
<td>YUBA</td>
<td>0.1%</td>
<td>514,678</td>
<td>18,401</td>
<td>89,040</td>
<td>71,633</td>
<td>25,107</td>
<td>363,421</td>
<td>262,460</td>
</tr>
<tr>
<td>OTHERS</td>
<td>0.1%</td>
<td>721,540</td>
<td>89,873</td>
<td>85,414</td>
<td>109,357</td>
<td>32,477</td>
<td>227,174</td>
<td>274,635</td>
</tr>
<tr>
<td>TOTAL</td>
<td>13.3%</td>
<td>130,507,031</td>
<td>39,507,013</td>
<td>31,007,367</td>
<td>24,159,040</td>
<td>8,559,731</td>
<td>7,181,147</td>
<td>50,939,035</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REGION</th>
<th>BUTTE/Padre</th>
<th>MONTEREY</th>
<th>CARMELO</th>
<th>FRITZ</th>
<th>INDEPENDENCE</th>
<th>ALL OTHERS</th>
<th>ALL VARIETIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>CENTRAL</td>
<td>MERED</td>
<td>10.4%</td>
<td>93,441,841</td>
<td>30,904,110</td>
<td>31,163,990</td>
<td>17,867,125</td>
<td>10,966,024</td>
</tr>
<tr>
<td>SAN JOAQUI</td>
<td>6.0%</td>
<td>52,924,352</td>
<td>15,336,702</td>
<td>6,659,009</td>
<td>15,862,942</td>
<td>5,908,248</td>
<td>17,350,468</td>
</tr>
<tr>
<td>MADERA</td>
<td>15.1%</td>
<td>130,740,637</td>
<td>43,247,026</td>
<td>29,058,182</td>
<td>37,259,032</td>
<td>14,205,214</td>
<td>27,145,274</td>
</tr>
<tr>
<td>OTHERS</td>
<td>0.0%</td>
<td>201,500</td>
<td>54,084</td>
<td>53,076</td>
<td>18,978</td>
<td>1,849,946</td>
<td>43,373</td>
</tr>
<tr>
<td>TOTAL</td>
<td>31.5%</td>
<td>273,338,631</td>
<td>89,487,838</td>
<td>66,935,265</td>
<td>71,042,175</td>
<td>31,098,464</td>
<td>58,349,175</td>
</tr>
</tbody>
</table>

| SOUTHERN | FRESCO | 20.4% | 169,214,904 | 77,847,266 | 105,057,709 | 10,028,568 | 19,046,477 | 61,577,244 | 462,376,239 |
| KERN | 17.6% | 149,428,410 | 60,356,276 | 104,185,589 | 8,512,908 | 36,514,270 | 7,664,549 | 37,823,732 | 398,276,672 |
| KING | 2.1% | 15,633,136 | 9,383,436 | 11,853,212 | 687,717 | 2,237,661 | 4,533,851 | 4,171,761 | 48,490,774 |
| MACEDA | 11.5% | 105,226,508 | 34,802,907 | 58,096,427 | 11,385,513 | 11,697,155 | 4,802,483 | 35,182,263 | 261,383,256 |
| TULARE | 3.6% | 32,450,459 | 7,849,391 | 19,466,678 | 978,813 | 5,769,710 | 8,346,323 | 6,270,264 | 81,149,638 |
| OTHERS | 0.0% | 486,754 | 8,252 | 218,559 | 44,451 | 71,408 | 63,406 | 59,094 | 953,924 |
| TOTAL | 35.2% | 472,472,171 | 100,247,528 | 228,858,174 | 31,837,458 | 76,120,669 | 44,347,089 | 138,884,388 | 1,252,567,503 |

| TOTAL | NORTHERN | 580,518,740 | 310,242,379 | 398,600,808 | 126,835,873 | 115,778,030 | 109,877,411 | 309,238,838 | 2,289,093,735 |

Source: USDA Form FV193, Report of Inedible Content of Almond Receipts. Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre. Totals may not add precisely due to rounding.

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.

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.

Carry-In as a Percentage of Prior Year Shipments

crop years 2010/11–2019/20

Source: Almond Board of California. *Forecasted.
### Historical Crop Size + Shipments vs. Farm Price

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

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Crop Size</th>
<th>Shipments</th>
<th>Farm Price per Pound</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/11</td>
<td>1,600.3</td>
<td>321.3</td>
<td>500</td>
</tr>
<tr>
<td>2011/12</td>
<td>1,979.9</td>
<td>254.0</td>
<td>518</td>
</tr>
<tr>
<td>2012/13</td>
<td>1,848.4</td>
<td>335.2</td>
<td>500</td>
</tr>
<tr>
<td>2013/14</td>
<td>1,970.7</td>
<td>317.2</td>
<td>500</td>
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<tr>
<td>2014/15</td>
<td>1,838.6</td>
<td>350.6</td>
<td>500</td>
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<td>2015/16</td>
<td>1,846.8</td>
<td>350.6</td>
<td>500</td>
</tr>
<tr>
<td>2016/17</td>
<td>2,087.5</td>
<td>410.2</td>
<td>500</td>
</tr>
<tr>
<td>2017/18</td>
<td>2,211.9</td>
<td>398.7</td>
<td>500</td>
</tr>
<tr>
<td>2018/19</td>
<td>2,233.3</td>
<td>359.0</td>
<td>500</td>
</tr>
<tr>
<td>2019/20</td>
<td>2,156.0</td>
<td>318.3</td>
<td>500</td>
</tr>
</tbody>
</table>

### Position Report of California Almonds
crop years 2010/11–2019/20 | million pounds

### World Destinations
crop years 2014/15–2018/19 | million pounds

#### Americas

- **North America**
  - **Canada**: 60.52
  - **Mexico**: 23.55
  - **TOTAL NORTH AMERICA**: 84.07
  - **Barbados**: 0.03
  - **Belize**: 0.01
  - **Chile**: 5.26
  - **Colombia**: 2.01
  - **Costa Rica**: 0.09
  - **Dominican Republic**: 1.97
  - **Trinidad**: 0.08
  - **TOTAL LATIN AMERICA/CARIBBEAN**: 16.48
  - **TOTAL AMERICAS**: 103.36

#### Asia/Pacific

- **Northeast Asia**
  - **China/Hong Kong**: 128.03
  - **South Korea**: 56.92
  - **Japan**: 81.28
  - **New Zealand**: 9.36
  - **TOTAL ASIA-PACIFIC**: 620.00

- **South/Central Asia**
  - **India**: 231.35
  - **Pakistan**: 9.69
  - **TOTAL SOUTH/CENTRAL ASIA**: 251.88

- **Southeast Asia**
  - **Vietnam**: 57.23
  - **Thailand**: 7.33
  - **Singapore**: 3.85
  - **TOTAL SOUTHEAST ASIA**: 80.32

- **Southwest Asia**
  - **Egypt**: 4.08
  - **Jordan**: 11.40
  - **Israel**: 11.53
  - **TOTAL SOUTH/WEST ASIA**: 36.98

- **Australia/Oceania**
  - **Australia**: 5.73
  - **New Zealand**: 7.36
  - **TOTAL AUSTRALASIA/OCEANIA**: 9.46

- **Total Global Shipments**: 2,264.02

Source: Almond Board of California.
**Domestic + Export Shipments**
crop years 2014/15–2018/19 | million pounds

![Bar chart showing domestic and export shipments by crop years 2014/15 to 2018/19.](source: Almond Board of California)

**Export Shipments by Product Type**
crop years 2014/15–2018/19 | million pounds

![Bar chart showing export shipments by product type.](source: Almond Board of California)

**Shipments by Region**
crop year 2018/19

![Pie chart showing regional shipments.](source: Almond Board of California. Note: Totals may not add precisely due to rounding.)

**Top Global Destinations**
crop year 2018/19 | million pounds

![Bar chart showing top global destinations. For the first time ever, India was the #1 export market. Top 10 export markets represent 70% of total export shipments.](source: Almond Board of California. July 2019 Position Report)
Top Ten California Crop Acreage

![Bar chart showing top ten California crop acreage for 2017*.

California’s Top Ten Valued Commodities

![Bar chart showing top ten valued commodities in California for 2018, measured in millions USD.

Top Ten U.S. Specialty Crop Exports by Value

![Bar chart showing top ten U.S. specialty crop exports by value for 2018*, measured in millions USD.

Did You Know?
Growing 400+ commodities, California produces more than ¾ of U.S. vegetables and ¾ of fruits and nuts.

Domestic per Capita Consumption of Tree Nuts
crop years 2014/15–2018/19 | pounds per capita

![Bar chart showing per capita consumption of tree nuts from 2014/15 to 2018/19.

U.S. Production + Imports of Competing Nuts
crop years 2009/10–2018/19 | million pounds (shelled basis)

![Table showing U.S. production and imports of competing nuts from 2009/10 to 2018/19.


Source: California Department of Food and Agriculture Statistics. https://www.cdfa.ca.gov/Statistics.

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

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

Source: 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.

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.

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

Facebook
A place for almond farmers and processors to stay in touch with ABC
Almond Board of California

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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