ALMOND BOARD OF CALIFORNIA

ALMOND ALMANAC

2020
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 statistics 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.

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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.
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.

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.


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 17.

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.

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

<table>
<thead>
<tr>
<th>Handler Size</th>
<th>Number of Handlers</th>
<th>Percentage of Crop Handled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than 1 Million Pounds</td>
<td>26</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>1-24 Million Pounds</td>
<td>46</td>
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<td>25-49 Million Pounds</td>
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<tr>
<td>50-99 Million Pounds</td>
<td>11</td>
<td>32%</td>
</tr>
<tr>
<td>More Than 100 Million Pounds</td>
<td>4</td>
<td>29%</td>
</tr>
</tbody>
</table>

Where Almonds Are Grown production by county | crop year 2019/20

INTRODUCTION
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.

Program Budget Allocation

crop year 2019/20

- Global Market Development: 61%
- Strategic Ag Innovation Research: 9%
- Global Communications: 7%
- Technical + Regulatory Affairs: 11%
- Scientific Affairs + Nutrition Research: 4%
- Information Technology: 1%
- Almond Quality + Food Safety Services: 3%
- Administration: 1.4%
- Totals may not add precisely due to rounding.

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

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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.
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.

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.1

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 2019

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

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.
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.

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 arrive. 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 growing pollinator-friendly cover crops in or adjacent to almond orchards.

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 microirrigation: an important contributor to the 33% reduction in the amount of water needed to grow each pound of almonds between the 1990s and 2010s. 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.

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.

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.

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.

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. Farms that use this practice sequester 2.4 tons of carbon per acre, equivalent to living car-free for a year.

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

- **1992**: Publication of First Almond Heart-Health Study
- **1996**: ABC Begins Investing in Heart Health Research
- **1998**: Publication of First ABC-Funded Health Study
- **2002–2006**: Portfolio Diet Studies
- **2003**: FDA Qualified Heart-Health Claim
- **2011**: ABC Begins Participating in AHA Food Certification Program
- **2017**: Almonds “healthy” by new FDA criteria

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

New Study investigated how almonds influence blood vessel health (via flow-mediated dilation) and the heart’s response to mental stress (via heart rate variability).

Did You Know?

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

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 available.

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

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.

- Japan
  - Developing aflatoxin strategies with U.S. government.

- 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.
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.

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.

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:

- 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.

Did You Know?

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

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

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.

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.

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.

The Snack that Fuels Americans

United States

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

Canada

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

Mexico

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

Global Market Development

Canada has the highest per capita consumption outside of the U.S.

#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.

“PonteAlmendra”: 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.

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/

GLOBAL MARKET DEVELOPMENT

Europe UK, GERMANY, FRANCE AND ITALY

MARKET SUMMARY
Reaching: Consumers, Health Professionals, Food Professionals
Active Since: 2008
FY 2019/20 Shipments: 575 Million Pounds\(^1\)

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.

Germany
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.

France
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.

Italy
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!

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.

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.

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 e-commerce is a big deal, and China’s e-commerce market is an even 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

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.

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.

Trade Marketing + Stewardship

PROGRAM SUMMARY
Reaching: Food Professionals
Active Since: 2012

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

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.

California Almond Crop Estimates vs. Actual Receipts
crop years 2001/02—2020/21 | million pounds

<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>
</tr>
</thead>
<tbody>
<tr>
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<td>824.1</td>
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<td>16.7</td>
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<td>1,032.9</td>
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<td>2004/05</td>
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<td>2005/06</td>
<td>880.0</td>
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<td>23.0</td>
<td>888.7</td>
<td>16.0</td>
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<tr>
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<td>1,116.7</td>
<td>28.9</td>
<td>1,087.8</td>
<td>24.0</td>
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<tr>
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<tr>
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<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>
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<tr>
<td>2010/11</td>
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<td>1,894.4</td>
<td>39.0</td>
<td>1,970.7</td>
<td>21.0</td>
</tr>
<tr>
<td>2011/12</td>
<td>1,950.0</td>
<td>2,020.4</td>
<td>40.5</td>
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<td>16.1</td>
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<tr>
<td>2012/13</td>
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<td>1,884.0</td>
<td>35.6</td>
<td>1,848.4</td>
<td>23.1</td>
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<tr>
<td>2013/14</td>
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<td>2,009.7</td>
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<td>1,970.7</td>
<td>21.0</td>
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<tr>
<td>2014/15</td>
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<td>23.4</td>
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<td>1,894.4</td>
<td>47.8</td>
<td>1,846.6</td>
<td>25.3</td>
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<tr>
<td>2016/17</td>
<td>2,050.0</td>
<td>2,135.7</td>
<td>48.3</td>
<td>2,087.4</td>
<td>26.0</td>
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<tr>
<td>2017/18</td>
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<td>2,260.5</td>
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<td>39.3</td>
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<tr>
<td>2019/20</td>
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<td>2,551.2</td>
<td>47.0</td>
<td>2,504.2</td>
<td>42.1</td>
</tr>
<tr>
<td>2020/21</td>
<td>3,000.0</td>
<td>*</td>
<td>60.0†</td>
<td>2,940.0</td>
<td>*</td>
</tr>
</tbody>
</table>

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.
California Almond Acreage

2011–2020

<table>
<thead>
<tr>
<th>Bearing Acres</th>
<th>Non-Bearing Acres</th>
<th>% Change from Previous Year of Bearing Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>800,000</td>
<td>3.9%</td>
</tr>
<tr>
<td>2012</td>
<td>820,000</td>
<td>2.5%</td>
</tr>
<tr>
<td>2013</td>
<td>880,000</td>
<td>7.3%</td>
</tr>
<tr>
<td>2014</td>
<td>950,000</td>
<td>5.7%</td>
</tr>
<tr>
<td>2015</td>
<td>970,000</td>
<td>2.2%</td>
</tr>
<tr>
<td>2016</td>
<td>1,030,000</td>
<td>2.1%</td>
</tr>
<tr>
<td>2017</td>
<td>1,090,000</td>
<td>TBD*</td>
</tr>
<tr>
<td>2018</td>
<td>1,180,000</td>
<td>8.3%</td>
</tr>
<tr>
<td>2019</td>
<td>1,260,000</td>
<td>6.8%</td>
</tr>
<tr>
<td>2020</td>
<td>TBD*</td>
<td>TBD*</td>
</tr>
</tbody>
</table>


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

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Yield per Bearing Acre</th>
<th>Value per Acre</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/11</td>
<td>1,230</td>
<td>$3,771</td>
</tr>
<tr>
<td>2011/12</td>
<td>2,540</td>
<td>$5,010</td>
</tr>
<tr>
<td>2012/13</td>
<td>3,300</td>
<td>$7,255</td>
</tr>
<tr>
<td>2013/14</td>
<td>2,280</td>
<td>$7,944</td>
</tr>
<tr>
<td>2014/15</td>
<td>2,010</td>
<td>$6,178</td>
</tr>
<tr>
<td>2015/16</td>
<td>2,210</td>
<td>$5,209</td>
</tr>
<tr>
<td>2016/17</td>
<td>2,000</td>
<td>$5,411</td>
</tr>
<tr>
<td>2017/18</td>
<td>1,780</td>
<td>$5,140</td>
</tr>
<tr>
<td>2018/19</td>
<td>2,090</td>
<td>$5,165</td>
</tr>
<tr>
<td>2019/20</td>
<td>1,540</td>
<td>$5,140</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Acreage (Acres)</th>
<th>Yield per Acre (LBS)</th>
<th>Farm Value (Million in Dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011/12</td>
<td>800,000</td>
<td>2,020</td>
<td>$4,007,860</td>
</tr>
<tr>
<td>2012/13</td>
<td>820,000</td>
<td>1,884</td>
<td>$4,816,860</td>
</tr>
<tr>
<td>2013/14</td>
<td>930,000</td>
<td>2,300</td>
<td>$6,384,690</td>
</tr>
<tr>
<td>2014/15</td>
<td>950,000</td>
<td>2,010</td>
<td>$7,388,000</td>
</tr>
<tr>
<td>2015/16</td>
<td>970,000</td>
<td>1,894</td>
<td>$5,868,750</td>
</tr>
<tr>
<td>2016/17</td>
<td>1,030,000</td>
<td>2,136</td>
<td>$5,052,460</td>
</tr>
<tr>
<td>2017/18</td>
<td>1,090,000</td>
<td>2,551</td>
<td>$5,052,460</td>
</tr>
<tr>
<td>2018/19</td>
<td>1,180,000</td>
<td>2,270</td>
<td>$5,052,460</td>
</tr>
<tr>
<td>2019/20</td>
<td>1,260,000</td>
<td>2,551</td>
<td>$5,052,460</td>
</tr>
</tbody>
</table>

Source: USDA, NASS/PRO. Note: Almond Board does not track prices. *Production numbers provided by Almond Board of California.

---

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

<table>
<thead>
<tr>
<th>Crop Year</th>
<th>Gross Crop Size, including Inedibles, in Million Pounds</th>
<th>Inedible Gross Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010/11</td>
<td>1,628</td>
<td>0.80%</td>
</tr>
<tr>
<td>2011/12</td>
<td>2,020</td>
<td>1.05%</td>
</tr>
<tr>
<td>2012/13</td>
<td>2,184</td>
<td>1.22%</td>
</tr>
<tr>
<td>2013/14</td>
<td>2,010</td>
<td>1.22%</td>
</tr>
<tr>
<td>2014/15</td>
<td>1,894</td>
<td>1.34%</td>
</tr>
<tr>
<td>2015/16</td>
<td>1,894</td>
<td>1.34%</td>
</tr>
<tr>
<td>2016/17</td>
<td>2,136</td>
<td>1.51%</td>
</tr>
<tr>
<td>2017/18</td>
<td>2,240</td>
<td>1.72%</td>
</tr>
<tr>
<td>2018/19</td>
<td>2,270</td>
<td>1.85%</td>
</tr>
<tr>
<td>2019/20</td>
<td>2,551</td>
<td>2.09%</td>
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</tbody>
</table>

Source: Almond Board of California.
**California Almond Production by County**
crop years 2010/11–2019/20 | million pounds

<table>
<thead>
<tr>
<th></th>
<th>BUTTE</th>
<th>COLUSA</th>
<th>GLERIN</th>
<th>SOLANO</th>
<th>SUTTER</th>
<th>YOLO</th>
<th>MENDOZA</th>
<th>SAN RAFAEL</th>
<th>PILGER</th>
<th>MADERA</th>
<th>TULARE</th>
<th>ALL OTHERS</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>NORTHERN</td>
<td>47.1</td>
<td>83.2</td>
<td>55.8</td>
<td>4.4</td>
<td>4.9</td>
<td>13.8</td>
<td>154.2</td>
<td>68.0</td>
<td>292.5</td>
<td>403.2</td>
<td>29.9</td>
<td>149.7</td>
<td>422.6</td>
</tr>
<tr>
<td>CENTRAL</td>
<td>340.4</td>
<td>402.3</td>
<td>423.0</td>
<td>364.0</td>
<td>376.5</td>
<td>191.4</td>
<td>215.1</td>
<td>135.5</td>
<td>302.3</td>
<td>319.2</td>
<td>31.0</td>
<td>203.5</td>
<td>989.6</td>
</tr>
<tr>
<td>TOTAL</td>
<td>487.5</td>
<td>485.5</td>
<td>478.8</td>
<td>410.4</td>
<td>424.5</td>
<td>345.6</td>
<td>349.3</td>
<td>230.0</td>
<td>594.8</td>
<td>620.4</td>
<td>60.9</td>
<td>273.2</td>
<td>1,422.2</td>
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</table>

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.

**Almond Tree Fruit Weight** crop year 2019/20

- **Kernels 31%**
- **Hulls 49%**
- **Shells 20%**

- 2.550 billion pounds of kernels
- 4.031 billion pounds of hulls
- 1.645 billion pounds of shells

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 Receipts by County + Variety

crop year 2019/20 | in pounds

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>NONPAREIL</th>
<th>BUTTE/Padre</th>
<th>MONTEREY</th>
<th>CARMEL</th>
<th>FRITZ</th>
<th>INDEPENDENCE</th>
<th>ALL OTHERS</th>
<th>ALL VARIETIES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NORTHERN</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Butte</td>
<td>1.7%</td>
<td>16,545,081</td>
<td>5,587,772</td>
<td>2,469,327</td>
<td>3,597,309</td>
<td>427,354</td>
<td>742,701</td>
<td>11,848,888</td>
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<tr>
<td>Colusa</td>
<td>4.5%</td>
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<td>14,950,562</td>
<td>12,463,575</td>
<td>10,413,735</td>
<td>6,785,383</td>
<td>1,941,479</td>
<td>17,689,092</td>
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<tr>
<td>Glenn</td>
<td>2.5%</td>
<td>30,338,073</td>
<td>8,645,877</td>
<td>3,751,450</td>
<td>6,265,756</td>
<td>940,892</td>
<td>614,881</td>
<td>2,978,711</td>
</tr>
<tr>
<td>Solano</td>
<td>0.6%</td>
<td>5,678,602</td>
<td>1,158,372</td>
<td>8,645,877</td>
<td>3,751,450</td>
<td>6,265,756</td>
<td>614,881</td>
<td>2,978,711</td>
</tr>
<tr>
<td>Sutter</td>
<td>0.4%</td>
<td>3,758,800</td>
<td>1,351,173</td>
<td>1,355,349</td>
<td>498,032</td>
<td>614,881</td>
<td>614,881</td>
<td>2,978,711</td>
</tr>
<tr>
<td>Tehama</td>
<td>0.7%</td>
<td>9,410,351</td>
<td>2,558,904</td>
<td>1,034,756</td>
<td>2,098,861</td>
<td>973</td>
<td>614,881</td>
<td>2,978,711</td>
</tr>
<tr>
<td>Yolo</td>
<td>2.2%</td>
<td>23,840,576</td>
<td>4,816,927</td>
<td>8,284,854</td>
<td>4,032,298</td>
<td>614,881</td>
<td>614,881</td>
<td>2,978,711</td>
</tr>
<tr>
<td>Yuba</td>
<td>0.1%</td>
<td>525,055</td>
<td>22,841</td>
<td>102,193</td>
<td>46,184</td>
<td>237</td>
<td>614,881</td>
<td>2,978,711</td>
</tr>
<tr>
<td>Others</td>
<td>0.1%</td>
<td>1,608,572</td>
<td>117,315</td>
<td>465,695</td>
<td>130,226</td>
<td>2,474</td>
<td>281,689</td>
<td>499,402</td>
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<td><strong>TOTALS:</strong></td>
<td>12.7%</td>
<td>143,254,584</td>
<td>39,210,743</td>
<td>30,944,209</td>
<td>28,293,957</td>
<td>8,830,426</td>
<td>10,867,819</td>
<td>62,336,453</td>
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</table>

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>NONPAREIL</th>
<th>BUTTE/Padre</th>
<th>MONTEREY</th>
<th>CARMEL</th>
<th>FRITZ</th>
<th>INDEPENDENCE</th>
<th>ALL OTHERS</th>
<th>ALL VARIETIES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CENTRAL</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Merced</td>
<td>8.8%</td>
<td>87,876,955</td>
<td>27,629,953</td>
<td>30,219,887</td>
<td>15,633,748</td>
<td>8,504,370</td>
<td>16,689,424</td>
<td>36,848,972</td>
</tr>
<tr>
<td>Stanislaus</td>
<td>11.9%</td>
<td>112,897,528</td>
<td>35,106,845</td>
<td>25,229,423</td>
<td>31,221,900</td>
<td>10,645,975</td>
<td>32,443,393</td>
<td>54,715,552</td>
</tr>
<tr>
<td>Others</td>
<td>0.1%</td>
<td>539,061</td>
<td>9,031</td>
<td>184,526</td>
<td>137,388</td>
<td>0</td>
<td>636,463</td>
<td>40,375</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td>25.6%</td>
<td>249,690,708</td>
<td>74,738,307</td>
<td>62,519,282</td>
<td>60,331,251</td>
<td>23,404,675</td>
<td>69,994,124</td>
<td>110,903,532</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COUNTY</th>
<th>NONPAREIL</th>
<th>BUTTE/Padre</th>
<th>MONTEREY</th>
<th>CARMEL</th>
<th>FRITZ</th>
<th>Wood Colony</th>
<th>All Others</th>
<th>All Varieties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SOUTHERN</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fresno</td>
<td>23.5%</td>
<td>248,845,539</td>
<td>75,435,794</td>
<td>125,952,948</td>
<td>10,354,328</td>
<td>30,184,452</td>
<td>32,021,754</td>
<td>85,500,226</td>
</tr>
<tr>
<td>Kern</td>
<td>19.3%</td>
<td>208,359,659</td>
<td>57,874,465</td>
<td>129,222,875</td>
<td>8,136,066</td>
<td>36,413,514</td>
<td>12,814,349</td>
<td>37,296,625</td>
</tr>
<tr>
<td>Kings</td>
<td>2.7%</td>
<td>24,338,394</td>
<td>9,056,636</td>
<td>16,428,678</td>
<td>124,008</td>
<td>1,951,302</td>
<td>9,759,624</td>
<td>7,151,161</td>
</tr>
<tr>
<td>Madera</td>
<td>11.7%</td>
<td>128,400,897</td>
<td>30,482,499</td>
<td>64,455,763</td>
<td>10,370,680</td>
<td>31,212,712</td>
<td>6,359,870</td>
<td>238,859,153</td>
</tr>
<tr>
<td>Tulare</td>
<td>4.6%</td>
<td>47,405,826</td>
<td>8,060,163</td>
<td>28,008,524</td>
<td>1,165,887</td>
<td>6,273,629</td>
<td>15,568,830</td>
<td>9,901,181</td>
</tr>
<tr>
<td>Others</td>
<td>0.0%</td>
<td>381,215</td>
<td>85,154</td>
<td>224,063</td>
<td>3,608</td>
<td>19,717</td>
<td>85,169</td>
<td>799,926</td>
</tr>
<tr>
<td><strong>TOTALS:</strong></td>
<td>81.8%</td>
<td>656,391,530</td>
<td>181,015,111</td>
<td>364,292,851</td>
<td>31,157,567</td>
<td>78,144,325</td>
<td>76,563,835</td>
<td>187,326,714</td>
</tr>
</tbody>
</table>

### Grand Total

|          | 100.0% | 1,049,336,822| 294,964,161| 457,756,042| 119,782,385| 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. Totals may not add precisely due to rounding.

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**Top Ten Almond-Producing Varieties**
crop years 2009/10 vs. 2019/20

**Carry-In as a Percentage of Prior Year Shipments**
crop years 2011/12–2020/21

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**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

Position Report of California Almonds
crop years 2011/12–2020/21 | million pounds

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

Source: Almond Board of California. Note: Totals may not add precisely due to rounding. *Estimated.
Domestic + Export Shipments
crop years 2015/16–2019/20 | million pounds

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/16</td>
<td>593</td>
<td>1,218</td>
</tr>
<tr>
<td>16/17</td>
<td>676</td>
<td>1,425</td>
</tr>
<tr>
<td>17/18</td>
<td>735</td>
<td>1,517</td>
</tr>
<tr>
<td>18/19</td>
<td>741</td>
<td>1,523</td>
</tr>
<tr>
<td>19/20</td>
<td>774</td>
<td>1,998</td>
</tr>
</tbody>
</table>

Source: Almond Board of California.

Export Shipments by Product Type
crop years 2015/16–2019/20 | million pounds

<table>
<thead>
<tr>
<th>Year</th>
<th>In-shell</th>
<th>Manufactured</th>
<th>Shelled</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/16</td>
<td>239</td>
<td>119</td>
<td>860</td>
</tr>
<tr>
<td>16/17</td>
<td>299</td>
<td>137</td>
<td>988</td>
</tr>
<tr>
<td>17/18</td>
<td>353</td>
<td>144</td>
<td>1,019</td>
</tr>
<tr>
<td>18/19</td>
<td>345</td>
<td>144</td>
<td>1,034</td>
</tr>
<tr>
<td>19/20</td>
<td>350</td>
<td>136</td>
<td>1,112</td>
</tr>
</tbody>
</table>

Source: Almond Board of California.

Top Global Destinations
crop year 2019/20 | million pounds

<table>
<thead>
<tr>
<th>Country</th>
<th>Shipments</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>256</td>
</tr>
<tr>
<td>India</td>
<td>193</td>
</tr>
<tr>
<td>Spain</td>
<td>134</td>
</tr>
<tr>
<td>Germany</td>
<td>99</td>
</tr>
<tr>
<td>China/Hong Kong</td>
<td>86</td>
</tr>
<tr>
<td>UAE</td>
<td>85</td>
</tr>
<tr>
<td>Japan</td>
<td>79</td>
</tr>
<tr>
<td>Italy</td>
<td>74</td>
</tr>
<tr>
<td>Netherlands</td>
<td>61</td>
</tr>
<tr>
<td>Turkey</td>
<td>60</td>
</tr>
<tr>
<td>Canada</td>
<td>40</td>
</tr>
</tbody>
</table>

Top 10 export markets represent 70% of total export shipments.

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 2010s.

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

*Calendar year January through December 2019.

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


Domestic per Capita Consumption of Tree Nuts
crop years 2015/16–2019/20 | pounds per capita


U.S. Production + Imports of Competing Nuts
crop years 2010/11–2019/20 | million pounds (shelled basis)

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
Home 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

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