



August 2024

## 2023/24 Year in Review

There were a number of notable accomplishments on behalf of the industry in crop year 2023/24. The following are some significant highlights:

- ABC successfully applied for Regional Ag Promotion Program (RAPP) and Emerging Markets Program (EMP) funds to the tune of \$7.25 million! These funds will help expand programs in India, as well as explore opportunities in emerging markets such as Morocco and Turkey.
- Working with USDA/FAS, AMS, and industry, Global Trade and Regulatory Affairs (GTRA) staff addressed mold testing – and rejections – by Italian import authorities.
- Successful visits by GTRA staff to Morocco, Turkey, India, Pakistan and various EU countries not only identified new market opportunities, but helped to expand and strengthen our alliances, partnerships and engagement with key regulatory agencies.
- China market access for almond hull pellets and cubes was finally achieved – and opens the path for bulk almond hull access.
- Close engagement by GTRA staff with USDA, USTR, and FDA resulted in most handlers getting registered under Decree 248 in China; new applications are also finally moving.
- Working with the UK Nuts and Dried Fruit Trade Association (NDFTA), successfully achieved a tariff suspension for almond exports to the UK for the next two years.
- In cooperation with USDA/FAS London staff, leveraged the existing EU PEC system to gain acceptance for a GB PEC certificate format for Great Britain, avoiding costly development of a new system for Great Britain.
- GTRA and Almond Quality staff participated in the UNECE forum in Geneva, resulting in recognition of three almond standards (inshell, kernel, blanched kernels) and an almond quality poster.

Your GTRA Team

Julie	<a href="mailto:jadams@almondboard.com">jadams@almondboard.com</a>
Gabriele	<a href="mailto:gludwig@almondboard.com">gludwig@almondboard.com</a>
Keith	<a href="mailto:kschneller@almondboard.com">kschneller@almondboard.com</a>
Abhijeet	<a href="mailto:akulkarni@almondboard.com">akulkarni@almondboard.com</a>
Brock	<a href="mailto:bdensel@almondboard.com">bdensel@almondboard.com</a>

**Issues Resolution and Formal Comments:** More than 50 issues were addressed this year, helping shippers access their global markets. To build on the synergies to educate and advocate, the GTRA team worked closely with the Almond Alliance, providing comments on various pieces of proposed regulations impacting growing to shipping almonds. Topics included new EPA/CARB regulations on harvest dust, almond standards (Kenya), nickel limits (EU), Decree 248 (China), trade priorities, and almond procurement, to name a few!

**Global Trade Strategy:** A comprehensive trade strategy, guided by priorities established by the ABC Board of Directors and the recent Deloitte market opportunities assessment, was developed which outlines potential tariff and technical barriers across a number of markets, identifying opportunities to leverage industry partner associations to amplify almond priorities – a key element to finding market access solutions as we expand exports into current and emerging markets.

GTRA engaged with several international delegations: a Vietnamese importer and processor team, a Pakistani delegation at the Gulfood in Dubai, the Turkish Nut Trade Association, and most recently a Vice Minister's delegation from China's Ministry of Agriculture and Rural Affairs (MARA).

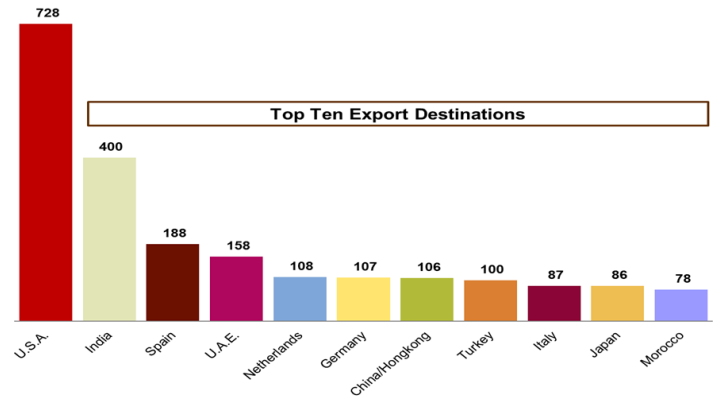
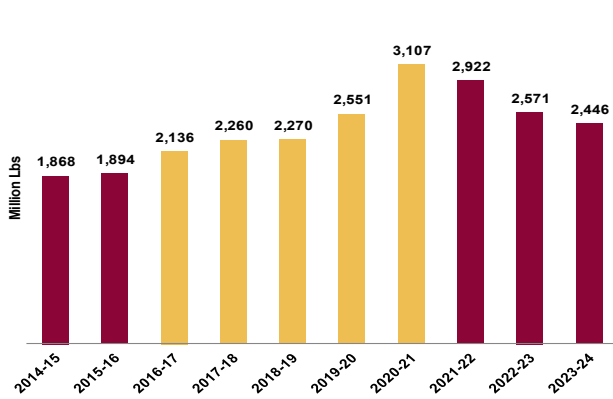
**Representing ABC and California Almonds:** GTRA staff build and maintain relationships with key partner organizations around the globe. ABC participates in the Specialty Crops Council MRL Workshop to discuss the impact of EU proposals on the use of pest control tools. Staff also sit on European technical committees with FRUCOM and chair European Snacks Association working groups. Through INC, staff represent the global nut industry at CODEX meetings and sit on regulatory, sustainability, and scientific working groups.



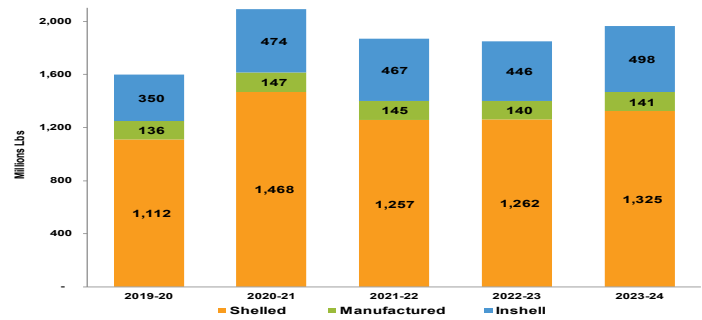
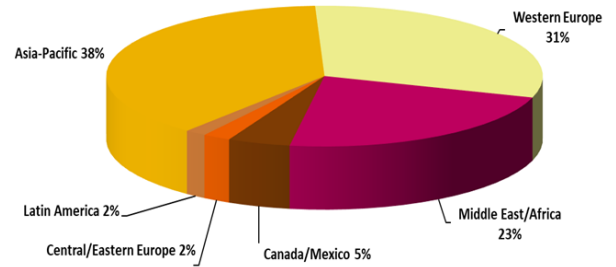
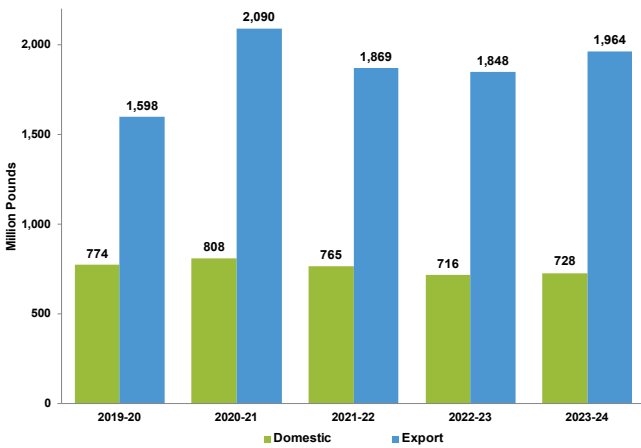
**August 2024**

**FY 23/24 Production: 2.45 billion pounds**

**FY 23/24 Export Shipments: Top 10, Region, Products**



**FY 23/24 Shipments: 2.69 billion pounds  
Domestic 27%; Export 73%**



**U.S. Agricultural Exports by Value, Calendar Year 2023**

Country/Region	U.S. Agricultural Exports (\$B)	US Almond Exports (\$M)	Percentage (%)	Almonds Ranking
EU27 & UK	\$14.5B	\$1,306M	9%	Almonds #2 Ag Export
India	\$1.9B	\$907M	47%	Almonds #1 Ag Export
China & HK	\$30.4B	\$325M	1%	
UAE	\$1.3B	\$258M	20%	Almonds #1 Ag Export
Japan	\$11.9B	\$212M	2%	
Turkey	\$1.6B	\$170M	11%	
Canada	\$28.4B	\$131M		
Morocco	\$.6B	\$116M	19%	Almonds #2 Ag Export

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- Julie: [jadams@almondboard.com](mailto:jadams@almondboard.com)
- Gabriele: [gludwig@almondboard.com](mailto:gludwig@almondboard.com)
- Keith: [kschneller@almondboard.com](mailto:kschneller@almondboard.com)
- Abhijeet: [akulkarni@almondboard.com](mailto:akulkarni@almondboard.com)
- Brock: [bdensel@almondboard.com](mailto:bdensel@almondboard.com)

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