2015 Almond Forecast

Presented by
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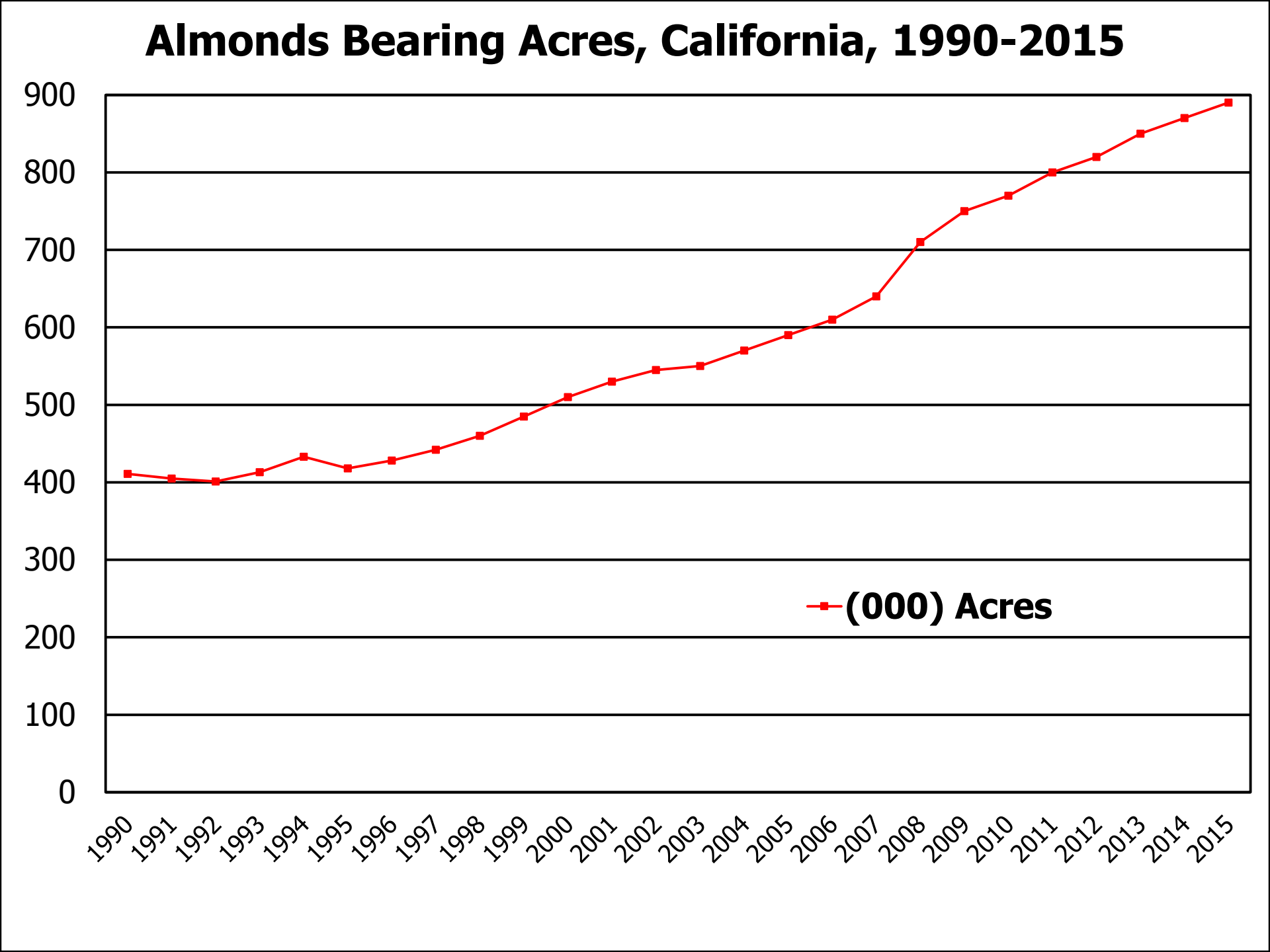
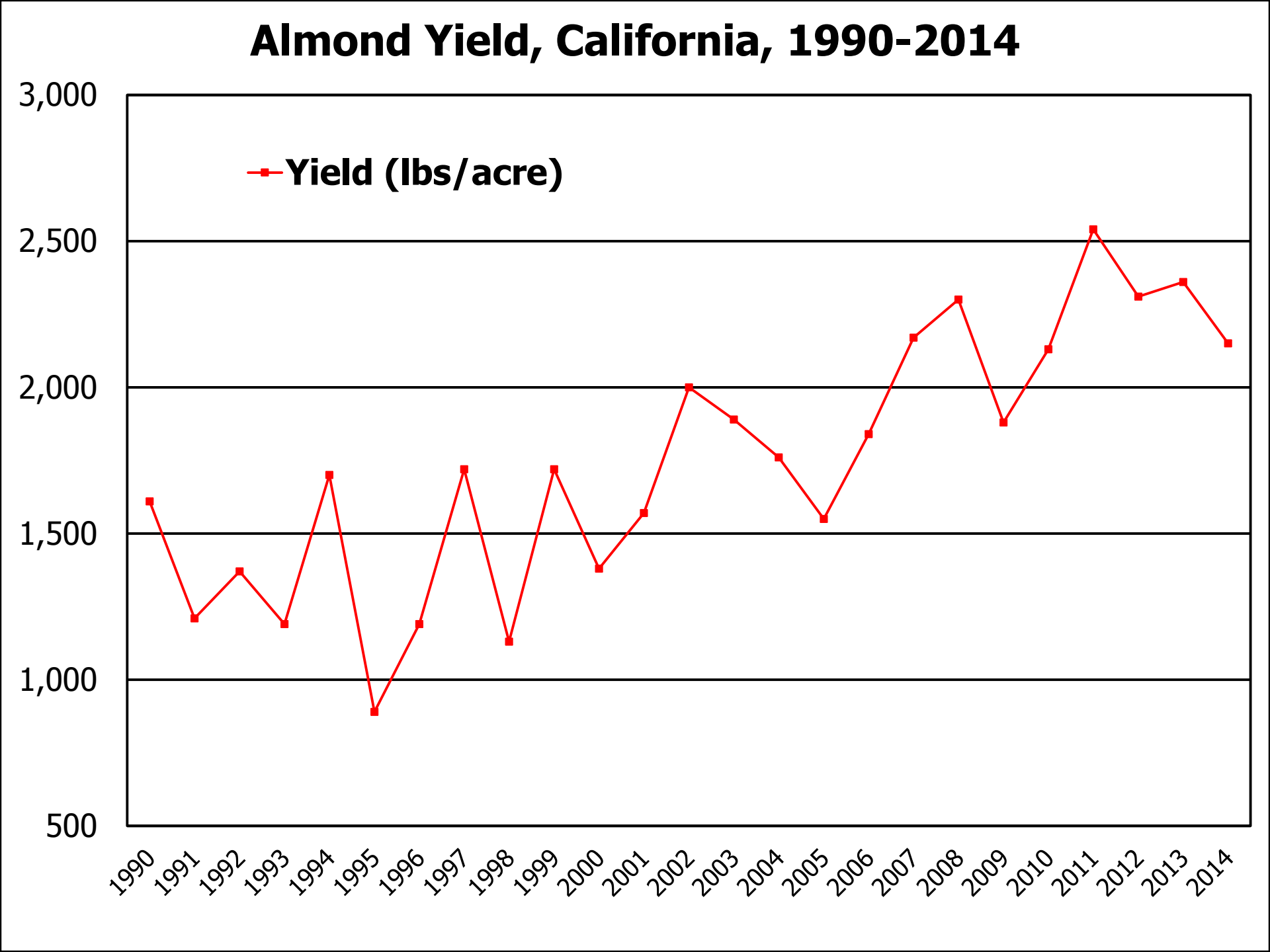
Almond Data 20 year interval

Year	Bearing Acres	Yield (lbs/acre)	Final Prod (000 lbs)	Value (000 $)
1924	55,370	168	9,280	2,400
1944	84,961	433	36,772	23,585
1964	101,812	859	87,464	47,502
1984	381,000	1,550	590,000	446,134
2004	570,000	1,760	1,005,000	2,189,005
2014	870,000	2,150	1,870,000	6,464,500

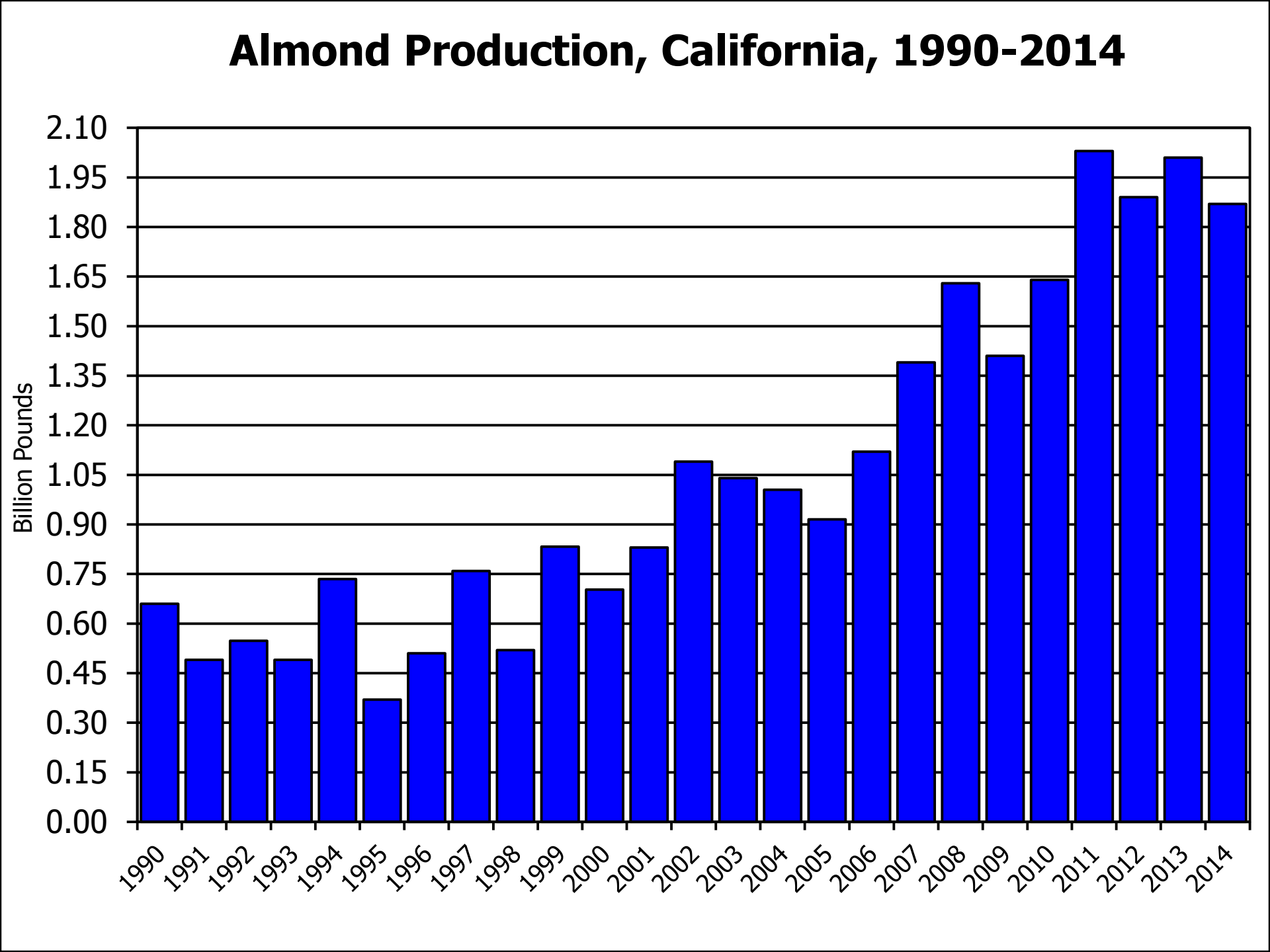
Growth of Almond Industry Change from 2000- 2014

- **Bearing Ac.** + 171 %
- **Yield** + 156 %
- **Production** + 266 %
- **Price** + 361% ($0.97 to $3.50)
- **Value** + 970 %


Almonds Bearing Acres, California, 1990-2015
900
800
700
600
500
400
300
200
100
0
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
(000) Acres

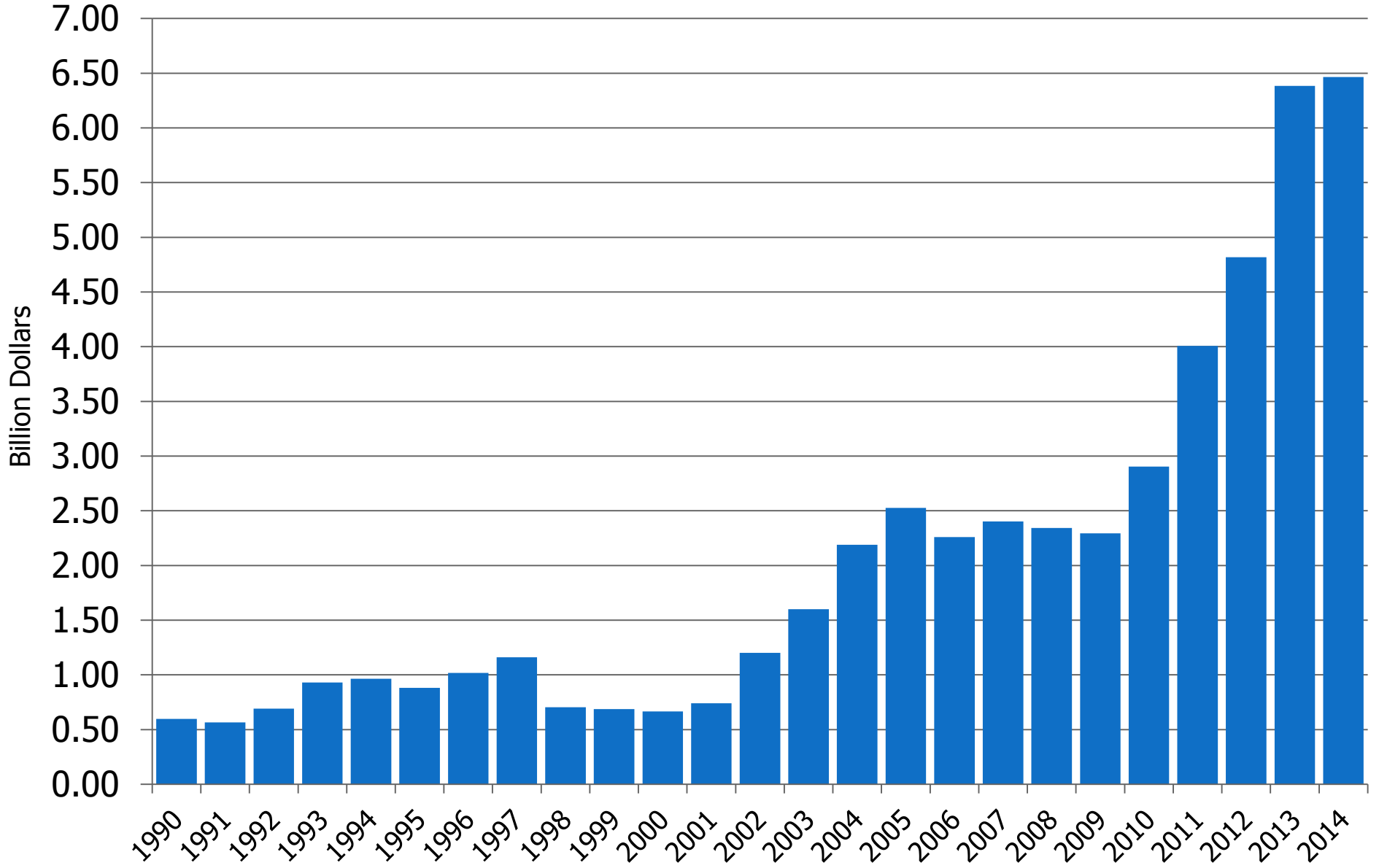

Almond Yield, California, 1990-2014
Yield (lbs/acre)
3,000
2,500
2,000
1,500
1,000
500
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014

Almond Production, California, 1990-2014



Almond Value of Production, California

1990-2014



Almond Statistics

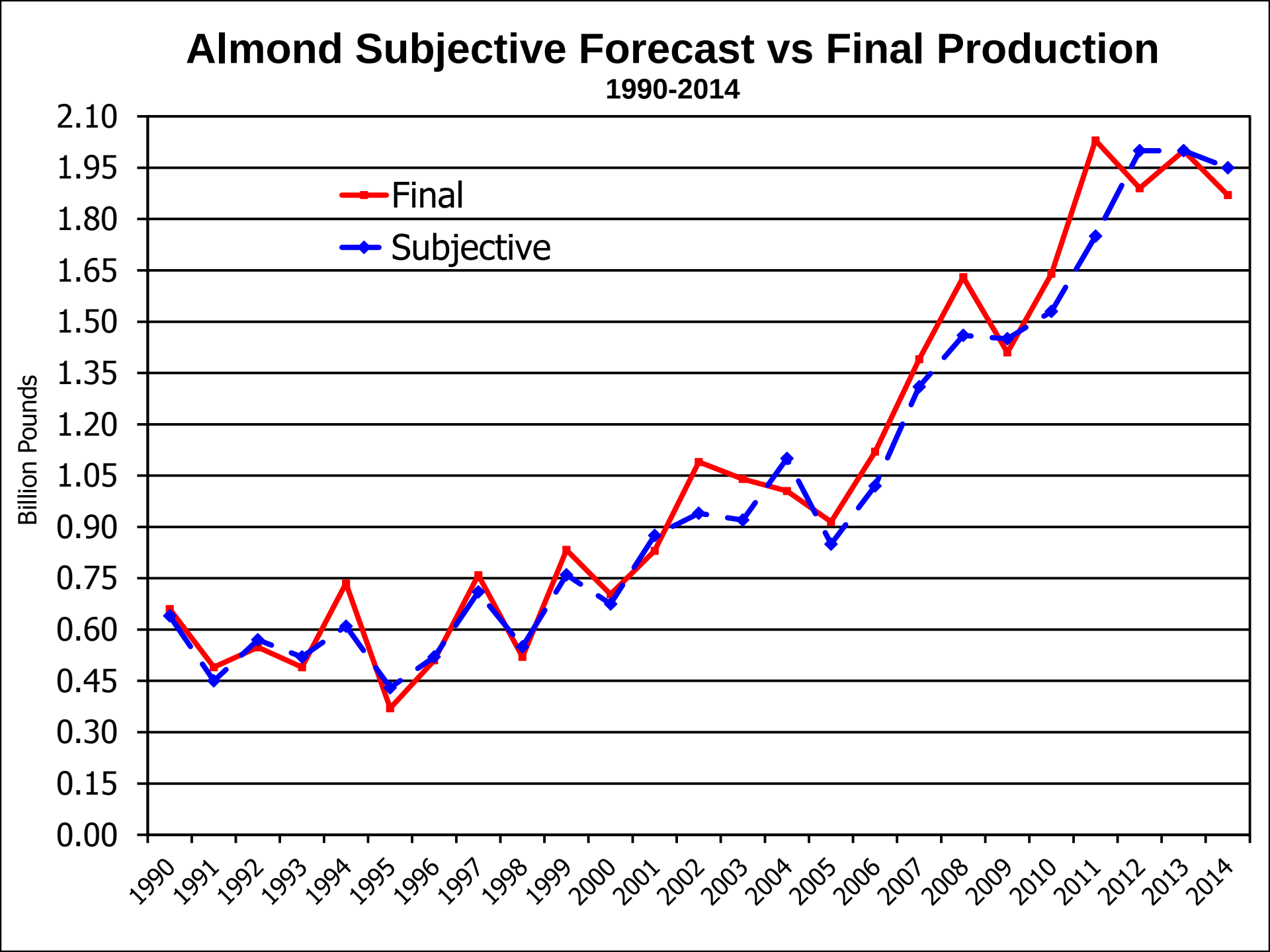
- **2014 Value: $6.46 Billion (record high)**
- **California produces virtually all US almonds**
- **California produces over 80 % of World total**
- **70-75 Percent of Crop Exported**
- **Approximately 6,000 growers in State**

Forecast and all Statistics Available Online

- Pacific Region Web: www.nass.usda.gov/ca
- NASS Web: www.nass.usda.gov
- Phone Contact: (916) 498-5161

Almond Subjective Forecast

- **Random Sample of Growers**
- **Sampling controls for size and county**
- **Contacted by Phone: April 14 – April 29**
- **Good response representing 29% of the total bearing acreage**
- **Based on current opinion of growers**
- **Only as good as their estimate, which has been good!**


Almond Subjective Forecast vs Final Production
1990-2014
Billion Pounds
2.10
1.95
1.80
1.65
1.50
1.35
1.20
1.05
0.90
0.75
0.60
0.45
0.30
0.15
0.00
Final
Subjective
1990
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014

Almond Crop Condition

- **After another warm California winter, almond bloom started very early this year. Bloom was fast and compact.**
- **Crop is developing quickly and is two weeks ahead of normal and even ahead of last year's early crop.**
- **Pest and disease pressure is currently low**
- **Water allotments are severely low**

Almond – bloom overview

2014

- Ok chilling hours - barely enough
- Rain and warm temps during bloom
- Bloom started early/mid February, one of the earliest blooms in memory.
- Bloom had a slow start and was scattered; bloom ended early March
- Overlap not ideal between pollinators and nonpareils

2015

- Ok chilling hours – “adequate”
- Rain and warm temps during bloom
- Bloom started around the same time as last year – early/mid February, very early
- Atypical bloom, last year’s stress thought to be a factor – Fritz & Monterey bloomed ahead of NP
- Overlap between pollinators and nonpareils again a concern – NP bloom irregular

Almond – post-bloom overview

2014

- Low pest pressure
- Lack of water a larger problem on the west side of the San Joaquin Valley
- No frost, hail or wind damage reported
- Nuts filled mid to late May
- Crop came in 7% below 2013

2015

- More pest issues than last year
- Again, no water – trees stressed
- Increased salinity of soil is an issue this year
- Some hail in March; damage not widespread
- Nut fill expected mid to late May
- Many comments that 2015 is looking very similar to 2014

Objective Measurement Forecast

July 1, 2015 (12:00 noon)

- **Based on Actual Counts and Measurements**
- **Generally it's more accurate**
- **940 Randomly Selected Orchards**
- **2 Trees in each Orchard**
- **Sample represents the Population**
  - **By Age**
  - **By Variety**
  - **By Location (County)**

2015 Almond Forecast

1.85 Billion meat lbs.

(down 1% from 2014 and 8% from 2013)

Bearing Acres: 890,000

(Trees Planted 2012 and earlier)

Yield: 2,080 lbs.

(down 3% from 2014 and down 12% from 2013)

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