

ALMOND BOARD OF CALIFORNIA

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**ALMOND ALMANAC**







## WELCOME TO THE ALMOND ALMANAC

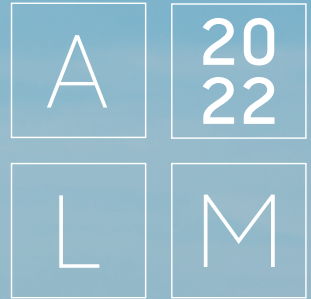
Within these pages you will find a comprehensive overview of California almonds—the state’s #1 crop by acreage, #1 ag export, #3 crop by value and the #1 specialty crop export in the U.S.

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. It also provides an overview of the 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<sup>1</sup> 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 98 processors in California.

1. The statistical analyses found in the *Almanac* 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.





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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.

## STRATEGIC PRIORITIES

**DRIVE GLOBAL DEMAND:** Build demand ahead of supply by investing in programs and research that increase market demand for almonds.

**SUPPORT A FAVORABLE TRADE AND REGULATORY ENVIRONMENT:** Leverage data, relationships and initiatives to help the industry produce, ship and market almonds with minimal disruption or obstacles.

**MAXIMIZE INDUSTRY EFFICIENCY:** Provide targeted tools and information to enable industry members to maximize their efficiency and profitability.

**OPTIMIZE ORGANIZATIONAL POTENTIAL:** Provide exemplary leadership, coordination and efficiency at all ABC levels, leveraging resources to deliver on strategic goals and industry priorities.



# A YEAR IN REVIEW

## CROP YEAR 2021/22 WAS A CHALLENGING YEAR FOR THE CALIFORNIA ALMOND INDUSTRY.

A confluence of events largely beyond the control of farmers—weather, the global political and economic environment and a logistical logjam at the ports—hit all sectors of the industry. The growing season got off to a rough start with a hard freeze hitting many parts of the valley during bloom, and the widespread drought in California and the West continues to affect the affordability and availability of water, forcing farmers to make tough decisions. Lower crop estimates provided some relief to concerns about storage capacity, but the artificially large inventory caused by the logistical nightmare put unprecedented downward pressure on prices. Low prices coupled with rising input costs for everything from fertilizer to fuel left many farmers operating in the red.

The Almond Board's number one priority is driving global demand for California almonds. Throughout the *Almanac*, key program highlights show how the ABC builds demand and protects it from erosion caused by challenges the industry is facing. It also features the many continuous improvement efforts of the California almond industry.

Here are some highlights of the past year:

**STRONG PRODUCTION AND SHIPMENTS:** Crop year 2021/22 marked the second largest crop and second largest shipments for California almonds. This may not have been a record production and shipment year, but 2020/21 was a tough year to beat with shipments up 22%. *Check out the annual shipping statistics on pages 38-41.*

**U.S. LAUNCHES NEW AD CAMPAIGN:** The new campaign aims to reach younger consumers in new and relevant ways and features “Al the Almond” who uses charming humor blended with key almond-related health facts to show how almonds are the ultimate friend in wellness. In addition to the U.S., the Almond Board launched a new campaign in France. *Learn more about the ABC's Global Marketing campaigns on pages 21-29.*

**TELLING OUR ZERO WASTE STORY:** According to the U.S. Department of Agriculture, almonds and other tree nuts are the least-wasted commodity we grow in the U.S. Less than 1% of almonds and other tree nuts are never consumed, compared to 40% for all foods. The Almond Board partnered with food waste expert Jonathon Bloom, author of *American Wasteland*, and the *New York Times* to share this important story with consumers. *See page 20 for more on this and other groundbreaking media partnerships.*

**2025 GOALS MIDPOINT:** The almond industry reached the midpoint in the journey toward the Almond Orchard 2025 Goals and is on track to meet or exceed three of the four goals—improving water use efficiency, increasing integrated pest management and achieving zero waste from the orchard—and significant progress has been made in reducing dust during harvest.



# ABOUT OUR COMMUNITY

## FARMING ALMONDS

The California almond growing community is driven by family farmers.

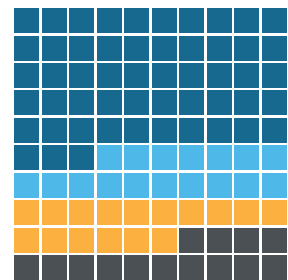
California is home to 7,600 almond farms, and 90% of those farms are family farms. Many of them are owned and operated by third- and fourth-generation farmers who live on their land and plan to pass it on to their children and grandchildren.



**90%** Family Farms  
**10%** Other

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.



**53%** 1-49 acres      **16%** 50-99 acres  
**17%** 100-249 acres      **14%** 250+ acres

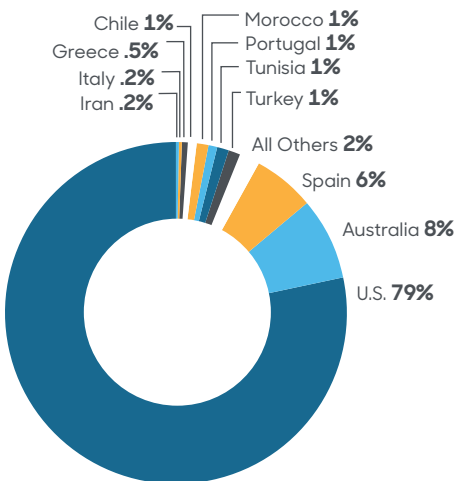
Source: USDA 2017 Census of Agriculture.

## CALIFORNIA GROWS NEARLY 80% OF THE WORLD'S ALMONDS

With its Mediterranean climate, California is one of the five places on earth where almonds can grow. And thanks to top agricultural universities and research partners, water infrastructure and great soils, it is the most productive almond-growing region in the world.

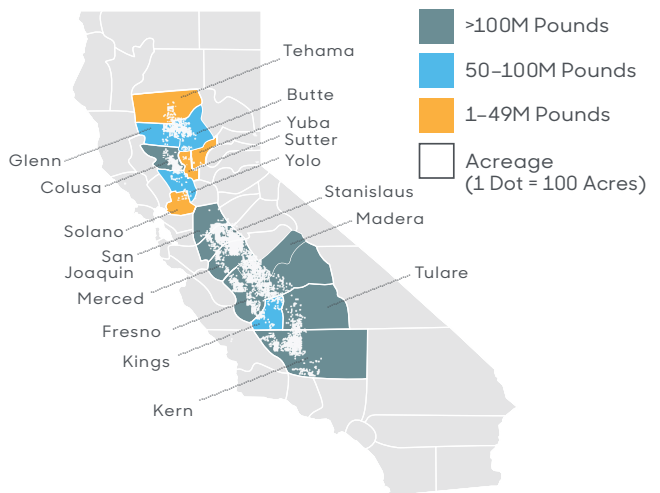
### WORLD ALMOND PRODUCTION

CROP YEAR 2021/22\*



### CALIFORNIA ALMOND PRODUCTION

PRODUCTION BY COUNTY | CROP YEAR 2021/22



Source: Almond Board of California, Almond Board of Australia and International Nut and Dried Fruit Council.  
\*Totals may not add precisely due to rounding.



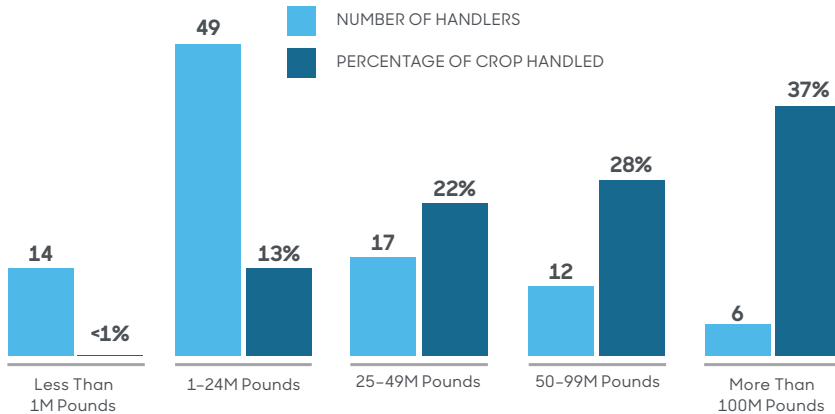


## PROCESSING ALMONDS

98 almond handlers process California almonds. Many of these operations are also family-owned.

### DISTRIBUTION OF CROP BY HANDLER SIZE

CROP YEAR 2021/22



## #1 DESTINATION FOR CALIFORNIA ALMONDS

At 29% share of shipments, the U.S. remained the #1 global destination for California almonds in 2021/22.

## EXPORT SHIPMENTS

- In 2021/22, 11.869 billion pounds (or 71%) of California almonds were exported resulting in the second largest export shipments on record.
- India is the #1 export destination for California almonds importing over 350 million pounds.

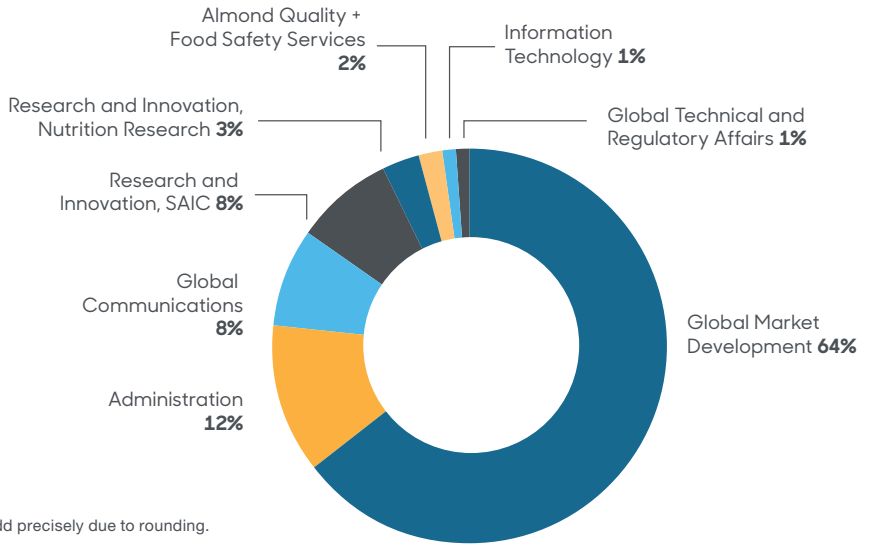


# PROGRAMS + BUDGET

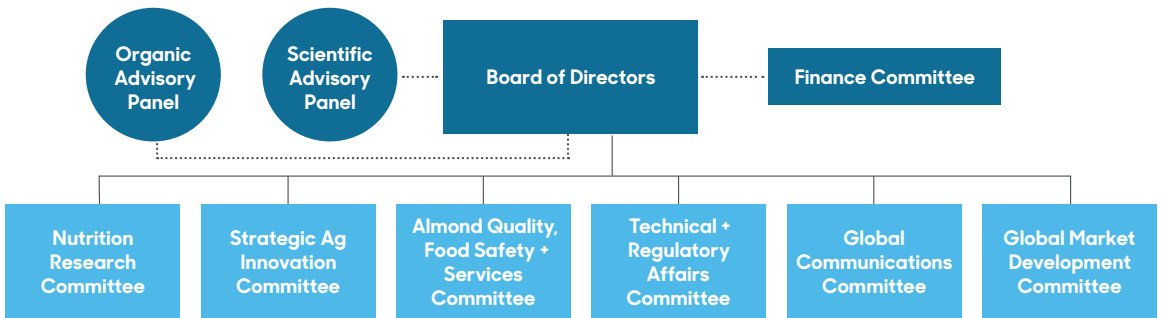
The Almond Board of California’s programs are funded by an assessment placed on every pound of almonds grown in California. Working with board-appointed committees, subcommittees and workgroups, the Board of Directors approves the budget allocation for each program area. These areas are defined in the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

## PROGRAM BUDGET ALLOCATION

CROP YEAR 2021/22\*



# COMMITTEE STRUCTURE



The **Almond Leadership Program** is a one-year leadership training program that inspires and prepares almond community members to join a network of leaders meeting the challenges of a changing industry.



# 2025 GOALS



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

MIDWAY THROUGH THE JOURNEY TO 2025, THERE ARE MANY TANGIBLE SIGNS OF GROWER ACTIONS UP AND DOWN CALIFORNIA'S CENTRAL VALLEY. HERE ARE A FEW EXAMPLES:



## FURTHER REDUCING THE WATER USED TO GROW ALMONDS

### SIGN OF PROGRESS: MANAGING WITH LESS

Improvements in efficiency of water use resulted in the industry achieving a 15% improvement from the baseline—reaching 75% of the goal (20% improvement by 2025) midway through the seven-year journey. The multi-year drought in the West has accelerated industry efforts to grow each pound of almonds with less water, including funding a major multi-year research project using remote sensing technology to better define how much water almond trees need to reach the next level of water use efficiency.



## ACHIEVING ZERO WASTE IN OUR ORCHARDS

### SIGN OF PROGRESS: HULL FOOD INGREDIENT IDEATION

The almond hull is like the part of a peach or apricot that we eat. Working with Mattson, North America's most successful independent developer of new foods and beverages for the retail and restaurant industries, the Almond Board is developing new food product prototypes using ground almond hulls as an ingredient in protein bars and other novel food items. The addition of almond hulls more than doubles the fiber content and cuts the total carbohydrates in half compared to popular protein bars.



## INCREASING ADOPTION OF ENVIRONMENTALLY FRIENDLY PEST MANAGEMENT TOOLS

### SIGN OF PROGRESS: LEAFFOOTED BUG MATING DISRUPTION

With the rise of leaffooted bug damage showing up in almond kernels at the handler, the bottom line of growers is at stake. Research funded by the Almond Board of California and conducted at UC Riverside is expanding environmentally friendly integrated pest management tools for combating the pest, including the development of a pheromone for traps and mating disruption.



## IMPROVING LOCAL AIR QUALITY DURING ALMOND HARVEST

### SIGN OF PROGRESS: LOW-DUST EQUIPMENT INCENTIVES

Equipment manufacturers have developed new low-dust harvesting equipment but new equipment can be cost prohibitive for farmers, especially small family operations. Partnering with allied organizations, the Almond Board funded necessary research and helped secure federal and state incentives to defray these costs. According to the San Joaquin Air Pollution Control District, their Low Dust Harvester program has co-funded replacement of 182 units at a cost of nearly \$15 million, reducing 1,299 tons of fugitive PM2.5 to date.

*For more information on the Almond Orchard 2025 Goals, visit [Almonds.com/Goals](https://Almonds.com/Goals)*





# CASP



## A NEW NAME, A NEW LOGO

The nine-module grower self-assessment tool underwent a major overhaul this year, streamlined to improve the user experience and to reflect industry needs. With the improvements came a new name and logo to reflect the changes. The “California Almond Stewardship Platform”—still CASP—is intended to clarify that CASP is not a sustainability certification program for California almonds. Rather, it is a platform that integrates research, education, self-assessments and tools. Individual growers can use the self-assessment to compare their practices to state averages and identify changes they may wish to consider in their own operations. The Almond Board also uses the aggregate data to quantify industry-wide farming practices and to share that story with consumers. Individual grower data remains anonymous and is only accessible to the grower and SureHarvest, a third-party organization that manages and protects the data.

## SELF-ASSESSMENTS STREAMLINED TO IMPROVE USER EXPERIENCE

Based on feedback from growers and handlers, the CASP self-assessment modules were reviewed and streamlined to eliminate duplicative questions. In addition, technological adaptations will improve the user experience by reducing the amount of time it takes to complete the program. Changes were also made to reflect how farming practices have evolved in the 13 years since the self-assessment modules were launched (2009). Careful consideration was given to every question retained or eliminated to ensure the quality of the data was maintained. The biggest difference for the user is reduced time to complete the self-assessment.

## AGGREGATED ASSESSMENTS DOCUMENT GOALS PROGRESS

In addition to allowing growers to compare their farm practices against industry averages, the aggregated data provides a big-picture look at industry progress in areas such as water use efficiency, adoption of integrated pest management tools, reducing dust during harvest and reducing waste by putting everything grown in the orchard to good use. The aggregated data demonstrates the industry’s progress against the Almond Orchard 2025 Goals. The 2025 Goals (see page 7) were announced in 2018 to help the industry tell the story of how almond farming practices are part of the solution to challenges facing agriculture and food production.



# 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, the Almond Board of California’s research-focused committees have guided the investment of \$109 million, working with leading universities and experts to uncover the positive impacts of almonds on human health, improve food safety and yields and optimize farming practices.

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



**STRATEGIC AG INNOVATION COMMITTEE**  
**FOUNDED: 1973**  
Research delivering new tools and management practices to growers, supporting our sustainability journey and informing regulations  
*For more about farming innovation and sustainability, see pages 10-13.*

**NUTRITION RESEARCH COMMITTEE**  
**FOUNDED: 1995**  
Expanding our understanding of the health benefit portfolio of almonds in support of growing global demand  
*For more about almonds’ impact on human health, see pages 14-15.*

**ALMOND QUALITY, FOOD SAFETY + SERVICES COMMITTEE**  
**FOUNDED: 2001**  
Ensuring we produce a safe, high-quality food, continuing almonds’ legacy as the gold standard among food products  
*For more on almond quality and safety, see page 16.*



# 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, reduce environmental impacts and increase profitability.

## A STRATEGIC APPROACH

The Almond Board of California-funded production and environmental research is directed by the industry, for the industry. Guiding that investment are three distinct workgroups—Production Stewardship, Pollination and Biomass—each composed of growers, processors and allied industry stakeholders. Based on research priorities set by the Strategic Ag Innovation Committee (SAIC), the workgroups review research proposals, track progress and set long-term research strategies.

In partnership with the Almond Board of California’s Research and Innovation staff, these groups oversee research across seven core topic areas—each integral to high-yield almond production and on-farm sustainability.



### PRECISION IRRIGATION

Building and vetting cutting-edge tools to improve almond irrigation for most efficient use of water across all of California’s orchards.



### BEE HEALTH + POLLINATORS

Supporting pollinator health year-round and informing bloom-specific practices for optimal yields.



### SOIL HEALTH + NUTRIENT MANAGEMENT

Improving soil quality through cover crops and organic inputs and increasing fertilizer precision for improved orchard health.



### BIOMASS + COPRODUCTS

Developing new, value-added uses for almond hulls, shells and woody biomass and bringing them from the lab to reality.



### VARIETIES + ROOTSTOCKS

Developing and evaluating almond rootstocks and varieties via traditional breeding for key attributes like drought tolerance and pest resistance.



### INTEGRATED PEST MANAGEMENT

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



### HARVEST

Re-envisioning almond harvest to reduce dust and improve efficiency.

## [Almonds.com/ResearchDatabase](https://www.almonds.com/researchdatabase)

Find reports and updates from all the Almond Board of California-funded research.



# POLLINATION PARTNERS

Bees and almonds: a partnership designed by nature. When almond trees bloom, bees get their first nutritious food source<sup>1</sup> of the year as they pollinate our orchards, consistently leaving stronger than when they arrive.<sup>2</sup> While bees are only with us for two months of the year, we work to support their health all year long because what's healthy for bees supports healthy, high-yielding almond farms.



## FARMER BEST PRACTICES

Developed in collaboration with partners beyond our industry and widely adopted by almond farmers, the Almond Board of California's Honey Bee Best Management Practices serve as a guide for almonds and other crops for protecting bee health on-farm. Many almond farmers are taking their bee-friendly practices a step further by planting blooming cover crops and hedgerows, guided by the Almond Board of California's Cover Crop Best Management Practices, adding supplemental nutrition and habitat on-farm for all pollinators.



## RESEARCH FOR HEALTHIER BEES

The Almond Board of California has led bee health research efforts since 1995, helping farmers provide safe habitats for bees before, during and after almond pollination. We also work 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. These efforts have led to a new management approach for varroa mites, a deadly pest for bees. By storing hives indoors at precise temperatures, beekeepers can break the pest's reproductive cycle, stopping infestations more effectively than traditional miticide treatments, saving beekeepers time and money.

## BEYOND BEES: SUPPORTING NATIVE POLLINATORS

By planting blooming cover crops and hedgerows in or near their orchards, almond growers can provide supplemental nutrition and habitat for all pollinators. These are three popular programs farmers use:

166,000 ACRES OF ALMOND ORCHARDS CERTIFIED AS BEE FRIENDLY<sup>3</sup>



99,000 ACRES OF ALMOND ORCHARDS PLANTED WITH POLLINATOR HABITAT SINCE 2013<sup>4</sup>



20 ALMOND FARMS ENROLLED IN SEED PROGRAMS SUPPORTING MONARCH BUTTERFLY HABITAT<sup>5</sup>



1. Ramesh Sagili. Department of Horticulture, Oregon State University. 2. Ellen Topitzhofer, et al. Assessment of Pollen Diversity Available to Honey Bees in Major Cropping Systems During Pollination in the Western United States. Journal of Economic Entomology. 2019. 3. Pollinator Partnership. October 2022. 4. Project Apis m. October 2022. 5. Monarch Joint Venture. October 2022.



# WATER WISE



BY 2025, THE ALMOND COMMUNITY COMMITS TO **REDUCE THE AMOUNT OF WATER USED TO GROW A POUND OF ALMONDS BY AN ADDITIONAL 20%.**

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 water in the most responsible way possible. It’s also why 83% of almond orchards use efficient microirrigation<sup>1</sup>; a driving force behind the 33% reduction in the amount of water needed to grow each pound of almonds between the 1990s and 2010s<sup>2</sup>. But we know there is still more to be done, and that’s why we’re doing it—rooted in research that drives further water conservation in almonds and across all of agriculture.



## PRECISION IRRIGATION

Farmers use data and modeling to help them decide how much and when to irrigate their trees, and the Almond Board of California is funding research to increase the precision of that information. From validating private-sector technology to developing new approaches, options like remote sensing and tree sensors will help farmers conserve water while still supporting tree health and optimal crop yields. Researchers are also creating and validating tools that assess variability within individual orchards, accounting for things like soil, tree varieties, plant health and average yields. With this, farmers and irrigation companies will be able to design irrigation systems that can meet hyper-local needs and save water.



## REGENERATING SOILS FOR WATER CONSERVATION

Improving soil health is an important agricultural practice for several reasons—water conservation included. In almond production, farmers can add organic matter to the soil by planting cover crops between the tree rows or, when replanting an orchard, recycling the old tree material back into the soil. In addition to benefits like carbon sequestration and improved yields, adding organic matter helps the soil hold water molecules higher in the soil profile, in line with almond trees’ root zones. Research is exploring precisely how these practices can decrease irrigation frequency in almond production.

1. California Almond Stewardship Platform. Nov. 2022. 2. University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990-94, 2000-14.



# CIRCULAR ECONOMY



BY 2025, THE ALMOND COMMUNITY COMMITS TO **ACHIEVE ZERO WASTE IN OUR ORCHARDS** BY PUTTING EVERYTHING WE GROW TO OPTIMAL USE.

Almonds grow in a shell, protected by a hull, on a tree. Traditionally, these have been used for livestock bedding, dairy feed and electricity generation, but the almond community is spurring innovation for higher value and even more sustainable uses. We've funded research in areas like recycled plastics, biofuels and regenerative agriculture, and are assessing the value proposition of possible new product streams for almond hulls and shells. This market development approach includes funding projects to spur development of these market opportunities, expanding from laboratory to actual market viability.



## HULLS AS A FOOD INGREDIENT

Working with renowned Bay Area food technology company Mattson, the Almond Board of California is exploring the use of almond hulls as a food ingredient. With nutritional value in the form of fiber, vitamins and minerals, together with a unique flavor profile—mildly bitter with desirable fruity and vanilla notes—promising uses include bakery products, coffee and nutritional bars made with almond hulls. In this multifunctional assessment, Mattson conceived six unique ideas for almond hulls as a food ingredient and prepared proof of concepts for the most promising options. Finding more diverse uses for almond coproducts will also add more value back to the industry financially and reduce our carbon footprint.



## WHOLE ORCHARD RECYCLING

Like forests, almond orchards capture and store carbon dioxide over their 25-year lifespans in a process known as sequestration. 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, water efficiency and yields in subsequent orchards. Farms that use this practice capture and store 2.4 tons of carbon per acre,<sup>1</sup> each one equivalent to living car-free for a year.<sup>2</sup>

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



# THE IMPORTANCE OF NUTRITION RESEARCH

Almonds are one of the world’s most nutritious and most researched foods. In fact, the Almond Board’s Nutrition Research Committee was founded in 1995 and has funded over 130 projects researching areas such as heart health, weight management, gut health, cognition, skin health and other areas of global public health concern. This commitment has led to a better understanding of the health benefits of including almonds in healthy dietary patterns.

## RESEARCH SPOTLIGHT

The Almond Board’s research spans numerous areas of health and nutrition, but the following have been key topics of interest this past year:



### SKIN HEALTH

Food as a means of promoting skin health is a growing area of scientific research. Several key nutrients found in almonds are linked to skin health, including vitamin E, zinc, two B vitamins—riboflavin and niacin—copper and linoleic acid, making them a delicious addition to daily beauty regimens. Two studies have been published in this area: one investigated how eating almonds may impact wrinkles and skin pigmentation in post-menopausal women and another studied if almonds help provide UVB protection. The body of research on skin health and almonds continues to expand with more studies planned to investigate this exciting area of research.



### DIABETES

Over a decade of research has investigated the role of almonds, as part of a healthy diet and lifestyle, in supporting healthy blood sugar. Many randomized controlled studies have been conducted and funded by the Almond Board of California to examine the consumption of almonds in relation to blood glucose control. In fact, studies suggest that including almonds in a healthy diet may have benefits for people with type 2 diabetes (T2D) as well as for those with prediabetes who are at risk for developing T2D. More recently, a study<sup>1</sup> conducted in India showed that almonds had a positive impact on both blood sugar control and markers of heart health in adults with T2D. Learn more about this research at [Almonds.com/Diabetes](https://Almonds.com/Diabetes)



### HEART HEALTH

More than two decades of research by the Almond Board supports the role of almonds in helping to maintain a healthy heart and healthy cholesterol levels. In fact, according to the U.S. Food and Drug Administration, scientific evidence suggests, but does not prove, that eating 1.5 ounces of nuts as part of a diet low in saturated fat and cholesterol may reduce the risk of heart disease. Moreso, the Almond Board’s research, which includes globally diverse groups, consistently shows a decrease of total cholesterol and “bad” LDL-cholesterol while maintaining “good” HDL-cholesterol. More recently, our research has expanded to include novel factors underlying heart health, such as heart rate variability and fibromuscular dysplasia, the narrowing and enlargement of arteries. Learn more about our heart health research journey at [Almonds.com/HeartHealth](https://Almonds.com/HeartHealth)

1. Madan J, Kalita S, et al. Effect of Almond Consumption on Metabolic Risk Factors—Glucose Metabolism, Hyperinsulinemia, Selected Markers of Inflammation: A Randomized Controlled Trial in Adolescents and Young Adults. *Frontiers in Nutrition*. 2021; doi:10.3389/fnut.2021.66862.

## NEW AREAS OF RESEARCH



While the Almond Board of California plans to keep investigating these three core areas of research for almonds, we also intend to stay relevant and current on what is next. We've begun expanding research to look at how almonds may:

1. SUPPORT IMMUNE HEALTH
2. SUPPORT MENTAL WELLBEING
3. AID IN EXERCISE RECOVERY AND PERFORMANCE

## NUTRITION RESEARCH IN THE MEDIA

Media is a valuable tool when it comes to sharing information with the public and is an effective way for the Almond Board of California to educate consumers and health professionals.

Today's media landscape is flooded with information—consumers are constantly bombarded with messages in the media via their phones, tablets and televisions, and out in public at sporting events, supermarkets and on billboards. Within the cluttered media space, consumers have developed some distrust in the messages they view, where misleading headlines or biased viewpoints have tainted the previously well-trusted news. This distrust has put a higher importance on the credible, evidence-based research the Almond Board conducts and shares about almonds.

Whether it is through traditional media outlets such as newspapers and print magazines, online articles or broadcast television shows, or through social media platforms and blogs, the Almond Board ensures our almond messaging and information is backed by science and is trustworthy. Here's how we transform our nutrition research to credible media stories.

**Almonds:**  
They're what's missing from your skincare routine.

**Here's why** →

What's the best skincare ingredient you "won't" find in your medicine cabinet?

**Almonds.**

- They may help protect against free radicals and UVB light.
- They're an excellent source of vitamin E.
- They could even reduce wrinkles and dark spots.

Swipe up to learn more



# ADDRESSING FOOD SAFETY AND QUALITY

California almond growers and producers are committed to providing a high-quality, nutritious and safe nut to customers around the world. The Almond Board’s food safety and quality programs address challenges and provide solutions to ensure confidence in California almonds.



## SWEET ALMOND VARIETIES

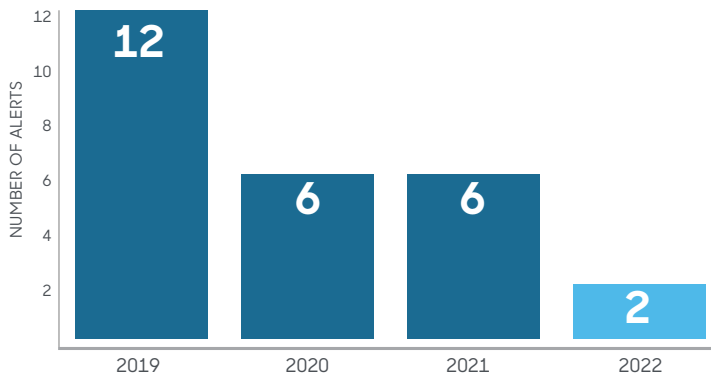
Almonds can be characterized by three flavor phenotypes: sweet (non-bitter), slightly bitter (or semi-bitter) and bitter. California almond growers only grow sweet varieties of almonds, which have low levels of amygdalin (a naturally occurring compound) present. When consumed, the amygdalin in almonds breaks down through enzymatic activity, releasing byproducts contributing to an amaretto-like flavor. In other regions of the world, “bitter” almonds are grown for specific products like almond paste or almond flavored extract. These “bitter” varieties have a higher level of amygdalin which includes trace amounts of hydrogen cyanide (HCN), which at high levels can be harmful. In a recent study, measuring amygdalin and HCN levels in 14 major California almond varieties, it was confirmed that **HCN is not a concern in California almonds**. Results showed average and maximum values well below European Union limits of 35 ppm, with average values across varieties ranging from 0.8 to 6.0 ppm.



## BEATING AFLATOXIN

A number of years ago, almond growers and processors started seeing increasing rejection of almond shipments to one of the industry’s biggest markets—the European Union (EU). The rejections were due to aflatoxin, a naturally occurring chemical produced by certain molds. The almond industry came together to develop programs and procedures to minimize aflatoxin at every stage of the growing and production process—efforts that continue to evolve as the almond community investigates how to better control the issue. The procedures include limiting a key pest to almonds, the navel orangeworm, and proper stockpile management, among others. Since 2019, aflatoxin alerts from the EU have continued to decrease due to these efforts.

### AFLATOXIN RAPID ALERTS IN THE EU DECREASING



Source: Almond Board of California

# KEEPING PACE WITH A FAST-PACED WORLD

Never has agriculture faced so many challenges—increasing crop input costs, political tensions and a complex regulatory environment. Two significant factors are the lingering effects of a global pandemic and a compromised supply chain. The California ag footprint is changing with the continued strain on water resources and environmental pressures. Remaining profitable means increasing industry efficiency, as well as driving global demand, which is shaped by complex trade relationships and evolving stakeholder priorities—the Almond Board of California is focused on addressing multiple challenges and finding opportunities all at the same time.

## CHINA DECREE 248

A rapidly implemented food registration system could have further limited access to the large China market, which is already pressured with retaliatory tariffs that were implemented in 2018. Working with USDA/FAS and FDA, the Almond Board of California staff continue to help handlers navigate the requirements, ensuring minimal disruption at Chinese import borders.

## SUPPLY CHAIN UNCERTAINTY

Almond shipments destined for more than 100 export markets depart California from the Oakland or LA/Long Beach ports. Demonstrated over the last year and a half, transportation logjams can severely impact the overall almond supply chain. In fact, shipping disruptions have conservatively cost the industry over \$800 million in just one year—more when factoring the impact on pricing, carrier fees, storage and warehousing costs.

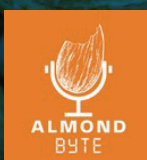
## GROWER INCENTIVES

Finding ways to support grower adoption of climate-smart practices and get credit for practices that are already in place has been a priority of the Almond Board of California. The Almond Board of California research has laid the groundwork for incentives and grants programs that promote pollinator habitat, whole orchard recycling and integrated pest management approaches like navel orangeworm mating disruption, and more.



## Stay Up to Date

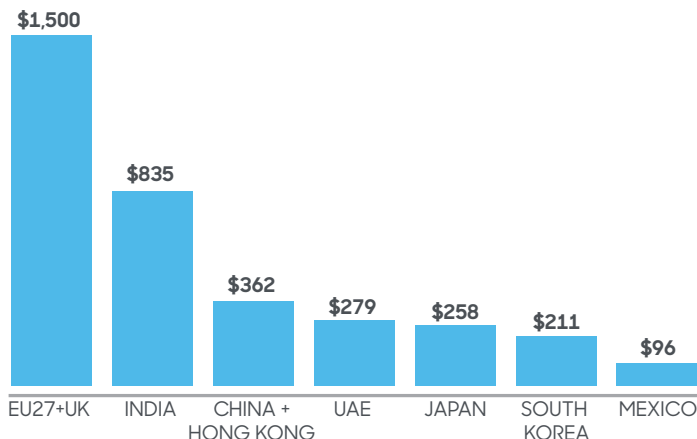
The *Almond Byte* podcast is an abbreviated audio version of the top stories from the monthly Global Update Newsletter, featuring the latest trade and regulatory issues from the Almond Board of California’s Global Technical + Regulatory Affairs team. Episodes air every two weeks; simply search “Almond Journey Podcast” wherever you get your podcasts and subscribe.



JAN-DEC 2021

## U.S. ALMOND EXPORTS BY VALUE

<b>EU:</b>	Almonds #2 ag export (\$1.5B) behind soybeans (\$2.3B).
<b>INDIA:</b>	Almonds #1 ag export (\$835M), nearly half of all U.S. ag exports (46%).
<b>CHINA + HK:</b>	Almonds #2 tree nut export (\$362M) and #14 ag export overall.
<b>UAE:</b>	Almonds #1 ag export (\$279M), accounting for 25% of all U.S. ag exports.
<b>JAPAN:</b>	Almonds #10 ag export overall (\$258M).
<b>S. KOREA:</b>	Almonds are the #9 ag export overall (\$211M).
<b>MEXICO:</b>	Tree nuts are small sector category export (\$332M); almonds #1 tree nut (\$96M).



# 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.

## 1

### INDUSTRY OUTREACH: THE BRIDGE BETWEEN TWO WORLDS

More than 7,600 California almond growers, processors and allied industry members look to the Almond Board of California to guide the industry into the future, while serving the needs and wants of today. Working together, with trusted partners and industry experts, the Almond Board of California is committed to serve the industry, through continuous listening, learning and adapting.

A core element of the Global Communications program is transferring knowledge from Almond Board-supported research to farmers and processors. The Almond Board's Field Outreach team, publications, special webinars and The Almond Conference are all focused on ensuring farmers and processors have the information they need to make key decisions to improve profitability and make continuous improvements to their operations. Here are a few highlights from 2022:



#### ALMOND JOURNEY PODCAST

If you ask a grower who they trust most when it comes to asking questions about production practices, “other growers” rises to the top of the list. The *Almond Journey Podcast* demonstrates how growers, handlers, huller/shellers and others have overcome challenges to make things work on their operation by elevating their success (and failure) stories and providing an opportunity for grower-to-grower knowledge sharing.



#### RESILIENCE: THE WHOLE ORCHARD RECYCLING ORIGIN STORY

The inspiring story of Brent Holtz's journey to help his family, his industry and his community is the subject of a six-minute documentary produced by the Almond Board of California and available on YouTube. The biopic shows how the power of an idea can change and benefit an entire industry and even the planet. The goal of the short film is to inspire more growers to recycle their orchards when replanting and to reassure them that there is a long, thorough history of research and scientific trials proving both the value and the benefits of whole orchard recycling for them and their communities.



#### DIGGING IN WORKSHOPS

In 2022, the Field Outreach team hosted multiple regional Soil & Irrigation field days across the state, from Chico to Wasco. They were half-day, in-the-orchard workshops that discussed topics from soil moisture by the hand-feel method and soil sampling techniques to choosing the proper filters and emission devices for your operation.



## 2 SHARING OUR SUSTAINABILITY STORY

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 educates the public about almonds’ orchard-to-table story and the responsible practices used to grow them. *Learn more on page 20.*



From the makers of *Planet Earth* and *The Blue Planet*, Sir David Attenborough’s latest docuseries featured—you guessed it—almonds! Premiering in the UK in February 2022 and the U.S. in July, the series will air in a total of 41 countries and likely land on streaming services after that. Stemming from a media request that reached the Almond Board of California in 2018, the show’s “Human Worlds” episode featured a thoughtful portrayal of almond production, as well as stunning videography, showcasing industry efforts to increase on-farm biodiversity.

### NEW INDUSTRY RESOURCES

In 2022, working with the Almond Board of California Research and Innovation department, the Industry Outreach team developed and distributed new materials to aid growers in making decisions in the orchard. New resources include updated stockpile guidelines, a soil health case study, integrated pest management tool videos, almond rootstock trial video, irrigation resource booklet and much more.







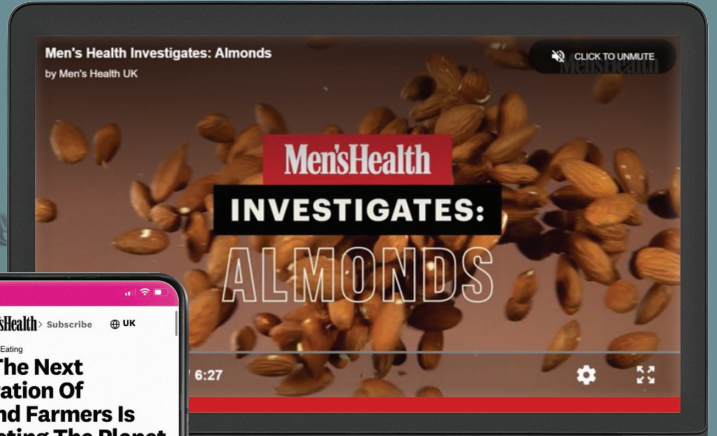
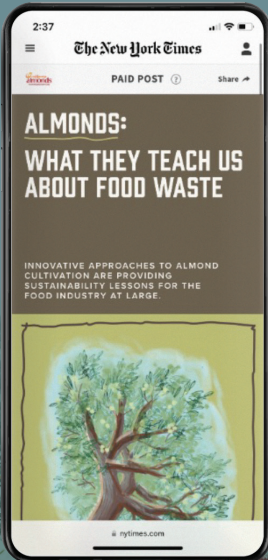
# BUILDING TRUST

People love almonds for their nutrition and versatility. Building upon that "health halo," the Almond Board of California's Sustainability Communications program works to build trust in California almonds by highlighting the farmers who grow them and the responsible practices used in their production.

This program uses a mix of advertising, public relations and partnerships, and supports the Almond Board of California's global marketing regions when issues arise.

# MEDIA PARTNERS

In 2022 the Almond Board of California collaborated with the *New York Times*, *Men's Health UK* and *Women's Health UK* to produce articles, videos and custom illustrations highlighting the almond community's responsible growing practices.





## DRIVING GLOBAL DEMAND

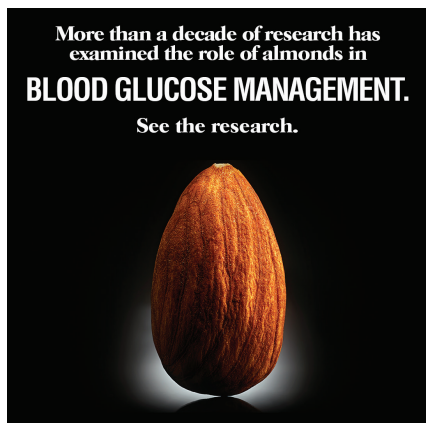
The number one priority of the Almond Board of California is building long-term worldwide demand for California almonds. The Almond Board staff and the Global Market Development Committee—composed of growers and processors—work together to identify the markets that will have the greatest return on investment for the entire industry. The current market portfolio consists of the following 10 markets, plus additional exploratory work in Brazil, Argentina and Chile.



In each of these markets, the Almond Board of California takes a custom marketing approach to most effectively reach consumers, health professionals and food professionals. *Learn more about the Almond Board of California's regional marketing activities on pages 22-29.*

From time to time there are global marketing initiatives that cross more than one market. Two examples of these programs in 2022 include:

### HEALTH-FOCUSED SOCIAL ADS RUN IN ALL MARKETS



Over the past 20+ years, the Almond Board of California has funded nutrition research exploring the various health benefits of almonds. The outcome of this research has served as a foundation to the Almond Board of California's marketing efforts worldwide and has contributed to the "health halo" that almonds have today. To build on this foundation, and to educate consumers on existing and new areas of research, the Almond Board of California launched a global advertising campaign on Facebook and Instagram targeting health-focused individuals. Two ads ran—one on diabetes and another on heart health. Each ad encouraged consumers to click through to a webpage to learn more about the body of research.

### PARTNERSHIP WITH MARVEL STUDIOS



There are few partnerships the Almond Board could embark on that could create more visibility than teaming up with Marvel Studios, the biggest movie franchise in the world. In 2022, the Almond Board of California partnered with Marvel in five countries—the U.S., India, the United Kingdom, Italy and Mexico—to co-promote almonds and the release of the movie *Thor: Love and Thunder*. The unique partnership offered a powerful opportunity to engage with consumers in a breakthrough way for almonds, by leveraging Marvel Studios' popularity and deep fan base.

SEE ALL OF THE ADS



## GLOBAL MARKET DEVELOPMENT



## UNITED STATES

### MARKET SUMMARY

**Active Since:** 1999

**FY 2021/22 Shipments:** 765 Million Pounds

The #1 global destination for California almonds.

### NEW U.S. AD CAMPAIGN TARGETS MILLENNIALS

In January 2022, the Almond Board launched a new U.S. marketing campaign aimed primarily at consumers between the ages of 30 and 45. Known as “Mindful Millennials,” this demographic is defined by how they approach health, wellness and nutrition in comparison to other Millennials.

**CALIFORNIA ALMONDS: YOUR FRIEND IN WELLNESS:** The new *Your Friend in Wellness* campaign features a fun character known as “Al the Almond.” Al uses charming humor blended with key almond-related facts to show how almonds are the ultimate friend in wellness. The campaign launched with eight ads produced for television and social media. Each ad features Al with a Millennial in a wellness setting—meditating, riding a bike, lying on a hammock or preparing a snack. Ads ran across paid social—YouTube, Facebook, Instagram, TikTok and more. TV ads could be seen on *MTV*, *Comedy Central*, *PopTV*, *Nick@nite* and *VH1*.



**MARCH MADNESS:** In March, the Almond Board of California supported the launch of the *Your Friend in Wellness* campaign with an ad presence around March Madness. Our ads could be seen on *CBS Sports*, *TNT*, *TBS* and *TruTV* and through live streaming. The Almond Board of California ads also ran in front of real-time NCAA Twitter highlights on @MarchMadness, @BleacherReport and @CBSSports.



**THOR: LOVE AND THUNDER:** Al the Almond continued to show up in new and exciting ways in 2022 when the Almond Board teamed up with Marvel Studios’ *Thor: Love and Thunder*. The commercial celebrated the many ways that almonds can be a weapon of wellness, whether you’re a superhero or mere mortal. The U.S. ad could be seen on Hulu, Instagram, Facebook, TikTok, *Comedy Central* and more.







## MEXICO

### MARKET SUMMARY

**Active Since:** 2018

**FY 2021/22 Shipments:** 29 Million Pounds

### A SHIFT TO HEART HEALTH

The Almond Board of California's program in Mexico features a clever campaign that reinforces the idea that one good choice—almonds—can give you the energy to master everyday obstacles. In 2022, the campaign evolved to include the heart health benefits of almonds, which is a key opportunity for consumers in Mexico.

**PONTE ALMENDRA—MARVEL STYLE:** The *Ponte Almendra* campaign features a memorable illustrative style. Tapping into this local style for the Mexico & *Thor: Love and Thunder* partnership, the Almond Board of California created an imaginative almond world, Marvel style! The ad featured a mother and son entering the imaginative world playing heroes, where almonds give them the power to take on the villains and win. Consumers in Mexico could catch the campaign on Facebook, Instagram, YouTube, cable television networks like *Discovery* and streaming television through a service called TotalPlay.



## BRAZIL + SOUTHERN CONE

### NEW EXPLORATORY MARKET FOR CALIFORNIA ALMONDS

Doing business in South America comes with many trade complexities. While these complexities continue to be a challenge, the Almond Board knows that consumer health and wellness trends continue to improve, making almonds a great choice. It is also true that consumers in this region believe that all nuts are very caloric and fattening providing an opportunity to start educating consumers. So, in 2022, the Almond Board began investing a minimal amount in public relations to share the factual information from the Almond Board of California's Nutrition Research program to make almonds part of the health and nutrition conversation.

GLOBAL MARKET DEVELOPMENT



**EUROPE** UK, GERMANY, FRANCE AND ITALY  
MARKET SUMMARY

**Active Since:** 2008  
**FY 2021/22 Shipments:** 646 Million Pounds\*

**GROWING DEMAND FOR ALMONDS AS A HEALTHY NATURAL SNACK**

With demand for healthy snacks showing no sign of slowing in Europe, consumer expectations continue to evolve. Through our marketing programs, we show people why almonds should be their go-to choice for healthy, tasty, natural snacks.



**ACCELERATING GROWTH WITH A NEW CAMPAIGN:**

In recent years, almonds have firmly established themselves as the snack of choice in France—no small feat in a country where people claim not to snack!

Taking advantage of the love people have for almonds, the Almond Board of California launched a new advertising campaign in April 2022 to help drive frequency of consumption. Called *Almonds Give Me More*, the campaign uses humorous scenarios to show how almonds are the ultimate natural snack and source of long-lasting energy to help outperform the day.

The campaign, which is running across traditional TV and paid social (Instagram, Facebook and YouTube), features four different creatives, including a woman who outperforms her spin instructor and parents who have more energy than their kids, all thanks to almonds. The advertising is also supported by an influencer and PR campaign.



\*Western Europe



## GERMANY

**PLANTING THE SEED FOR FUTURE GROWTH:**

Germany is the largest of our EU4 markets in terms of shipments. It is also a market where we're seeing good growth in snack nut sales, and wellness and plant-based trends are skyrocketing. These factors all point to a real opportunity for future growth for California almonds. The Almond Board of California is currently in the process of developing a new campaign that reflects the role that almonds play in Germans' lives, i.e. a simple, natural, plant-based snack.

Until the new campaign launches in 2023, the Almond Board of California is continuing to run the beauty-focused *Snack the Sun* campaign, which launched in 2017, to encourage daily consumption of almonds.

## ITALY

**ENERGY RECHARGE WITH THOR:**

Italy continues to show promising growth as an almond market, and Italians' love of California almonds has strengthened since the Almond Board of California started advertising in the market in 2018. In fact, total almond product volume increased by over 20% last year.

In FY 2021/22, the Almond Board of California stayed the course with its award-winning *Recharge Your Day* campaign, which benefitted from a new injection of energy thanks to the global Marvel partnership. Our *Thor* version of the ad tugs on heartstrings, featuring a mother working overtime—fueled by almonds—to create a homemade Mjolnir hammer for her son, so they can enjoy the *Thor* movie together—the only way two serious Marvel fans can.

## UK

**SUPERCHARGING DO YOU ALMOND? WITH THOR:**

The popular and award-winning *Do You Almond?* campaign, which celebrates those who fuel with almonds, continued running across multiple channels including advanced TV, video on demand, online video, YouTube, Instagram, Facebook and Spotify.

The UK also benefitted from the Almond Board of California's partnership with Marvel this year with an epic take on *Do You Almond?*, with a Love and Thunder twist. The *Do You Almond?* campaign features everyday people doing amazing feats thanks to the natural power of almonds. Our *Thor* version of the ad takes us to a classic British funfair where we see an unassuming woman taking on a traditional carnival game in true Mighty Thor fashion, all thanks to almonds.

## GLOBAL MARKET DEVELOPMENT



## INDIA

## MARKET SUMMARY

**Active Since:** 2010

**FY 2021/22 Shipments:** 353 Million Pounds

## ENGAGING YOUNGER CONSUMERS BEYOND TRADITION

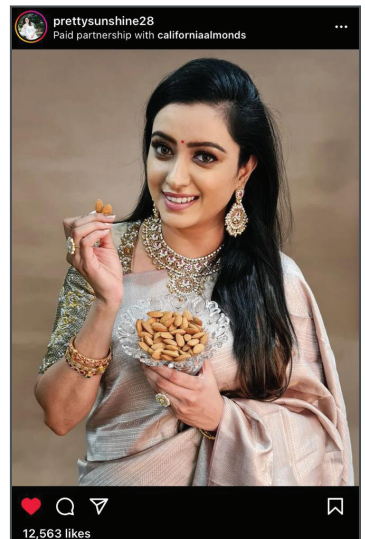
Strategically, Almond Board programs in India have reinforced traditional morning consumption, as well as consumption as a snack among all family members, and gifting during Diwali to drive further growth in this market. This is done through the *Tomorrow Begins Today* campaign as well as the *Diwali Gifting* campaign. This approach has proven very successful in keeping almonds top of mind and driving volume. Beyond tradition, the Almond Board continues to expand its focus on reaching a younger audience through digital advertising and influencer marketing.

**DIGITAL ADVERTISING:** To establish almonds as a healthy and natural snack, the Almond Board launched a *Younger Snacking* digital advertising program. Three ads were created featuring the benefits of almonds in helping to manage weight and improving blood glucose control and cholesterol. Continuing the *Beauty Snacking* digital program, the Almond Board of California runs four 10-second ads on YouTube and Facebook featuring the skin, hair and weight management benefits from consuming almonds.



**THOR: LOVE AND THUNDER:** India was one of five markets that collaborated with Marvel to promote their new film, *Thor: Love and Thunder*. The film's plot directly ties into the Almond Board's message of making an investment today to achieve larger successes tomorrow. Keeping this objective in mind, the Almond Board team in India produced an advertisement that talks about how almonds are a natural snack that provides one with energy throughout the day which fuels the effort to find one's purpose, the ultimate success. The ad ran on Facebook and YouTube.

**INFLUENCER CAMPAIGNS:** To strengthen almond positioning as a prominent natural snack, the Almond Board of California launched a program on Instagram using a mix of influencers and celebrities from different categories like Health & Wellness and Beauty. Over 40 Instagram influencers, celebrities and experts reached an urban, younger audience with relatable content. The program included four independent campaigns emphasizing the various health benefits, with the goal of encouraging enhanced almond consumption.







## CHINA

### MARKET SUMMARY

**Active Since:** 1999

**FY 2021/22 Shipments:** 127 Million Pounds

### REACHING NEW CONSUMERS

Given the enormous size of China, it is common for brands to take a geographic approach to marketing, and in recent years, the Almond Board has focused marketing efforts in the three top-tier cities: Beijing, Shanghai and Guangzhou. But in 2022, the ABC shifted their marketing efforts to one top-tier city and three tier-two cities: Shanghai, Hangzhou, Tianjin and Chongqing where consumers are seeking healthy foods and are experiencing rising incomes, but are less aware of the benefits of eating almonds. Furthermore, the populations in these four cities are equivalent to the other cities, making this a great opportunity to build new demand for almonds in China.

**MAGIC HANDS:** The Almond Board's *Magic Hands* campaign continues to reach consumers successfully in China. The campaign, which launched in 2019, aims to drive awareness of the “healthy beautiful skin” attributes of California almonds.



**THE SKIN EXPERTS 3.0:** In its third year, *The Skin Experts* program continues to be a successful way to reach consumers in China. *The Skin Experts* program is a livestream event hosted by the Almond Board where dermatologists, nutritionists and cosmetic R&D experts all come together to share their skin health tips—including eating almonds. In 2022 the Almond Board further leveraged *The Skin Experts* program in the e-commerce space by partnering with T-mall during the “9.17 Foodie Festival.”



GLOBAL MARKET DEVELOPMENT



## SOUTH KOREA

### MARKET SUMMARY

**Program Launch:** 2011  
**FY 2021/22 Shipments:** 65 Million Pounds

### OWNING VITAMIN E

Koreans aim to obtain their vitamin intake from their food, and in this market, it is very common to ask what vitamins and minerals are in specific foods to ensure a balanced nutrient intake. Leveraging this insight, the Almond Board educates consumers on the vitamin E content in almonds.

**BEAUTY SECRET VIRTUAL REALITY STUDIO:** Leveraging new technology as an authentic way to reach consumers, the Almond Board hosted a one-month-long virtual reality event in 2022. The event aimed to raise awareness of almonds as a perfect beauty snack. To attract interest and encourage participation, the event was promoted on social media platforms such as Naver Blog, Facebook, Instagram and Twitter, along with being promoted to the media.



## JAPAN

### MARKET SUMMARY

**Program Relaunch:** 2018  
**FY 2021/22 Shipments:** 95 Million Pounds

### INCREASING CONSUMER AWARENESS OF THE BEAUTY BENEFITS OF ALMONDS

The Almond Board relaunched marketing efforts in Japan in 2018 and has been focused on educating consumers on the beauty benefits of almonds.

**INSPIRING CONSUMERS:** Omotesando is one of the most fashionable areas in Tokyo, consisting of two areas: Harajuku and Aoyama. The area, which features high-end boutiques, elegant shopping and dining experiences, has over 3 million visitors per month. The Almond Board collaborated with popular restaurants and cafes in the Omotesando area offering dishes with almonds. The event ran from January 23 (Japan's National Almond Day) to February 13 and was featured in the media and on popular social media platforms.





# TRADE MARKETING + STEWARDSHIP

**TRADE MARKETING:  
POWERING ALMOND  
PRODUCT INNOVATION  
ACROSS THE GLOBE**

The Almond Board of California inspires global food professionals to use almonds as an ingredient by investing in several immersive and engaging tactics. Through trade media, advertising, online events, spokespersons, e-newsletters and trade shows, the Almond Board created multiple touchpoints and spaces to share information and motivate food professionals to work with almonds. The following are a few examples of these activities:

## CREATING ONLINE SPACES FOR ALMOND INSPIRATION:

Digital platforms like webinars, WeChat (China) and LinkedIn drive engagement around specific subjects using subject matter experts to educate how almonds can be a solution for delivering versatility and health attributes.

**Why Almonds?** Three young start-ups answered this question in an Almond Board-hosted webinar, which drew in product developers from large and small companies around the world.

In China, more than 3,000 food professionals joined a sponsored Food Daily Forum webinar with Innova Market Insights to learn how almonds fit into today’s key trends.



## HITTING THE TRAIL AT GLOBAL TRADE SHOWS AND IN-PERSON SEMINARS:

Each year, the Almond Board of California attends several trade shows to reach and inspire a broad range of food professionals and international audiences. Two key events include the **Institute of Food Technologists (IFT)** conference in the U.S. and **Gulfood** in Dubai. Gulfood drew in over 90,000 professionals and IFT offered networking opportunities with over 18,000 food professionals.

In addition to attending trade shows, the Almond Board hosted **educational seminars** in markets such as India, Japan and South Korea.



## GENERATING BUZZ IN FOOD PROFESSIONAL NEWS MEDIA:

Trade advertising, editorial placements, podcasts and more provide a year-round drumbeat of inspirational reminders about the benefits of using almonds. This content is strategically placed where food professionals seek information.

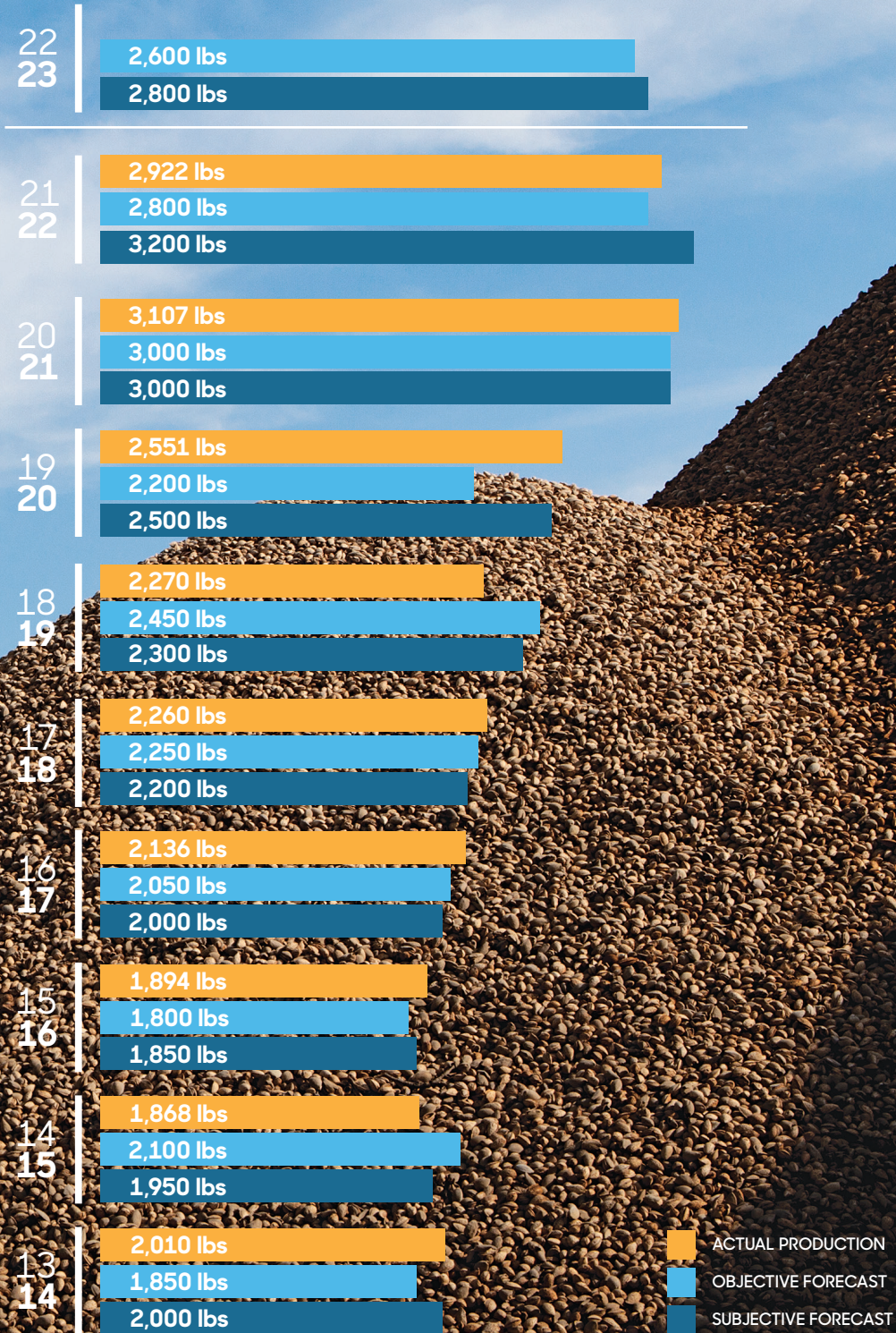




# FORECASTS VS. ACTUAL PRODUCTION

## CALIFORNIA ALMOND FORECASTS VS. ACTUAL PRODUCTION

CROP YEARS 2013/14-2022/23 | MILLION POUNDS



Sources: Almond Board of California, USDA-NASS Pacific Regional Office.



## CALIFORNIA ALMOND CROP ESTIMATES VS. ACTUAL RECEIPTS

CROP YEARS 2003/04–2022/23 | MILLION POUNDS

CROP YEAR	OBJECTIVE FORECAST	HANDLER RECEIPTS	LOSS AND EXEMPT	REDETERMINED MARKETABLE WEIGHT	LBS. REJECTS IN RECEIPTS
2003/04	1,000.0	1,032.9	21.8	1,011.1	19.8
2004/05	1,080.0	998.0	25.2	972.8	14.5
2005/06	880.0	911.7	23.0	888.7	16.0
2006/07	1,050.0	1,116.7	28.9	1,087.8	24.0
2007/08	1,330.0	1,383.0	24.7	1,358.3	17.2
2008/09	1,500.0	1,614.6	42.7	1,571.9	13.9
2009/10	1,350.0	1,405.9	26.9	1,379.0	19.6
2010/11	1,650.0	1,628.2	27.9	1,600.3	18.1
2011/12	1,950.0	2,020.4	40.5	1,979.9	16.1
2012/13	2,100.0	1,884.0	35.6	1,848.4	23.1
2013/14	1,850.0	2,009.7	39.0	1,970.7	21.0
2014/15	2,100.0	1,867.9	29.3	1,838.6	23.4
2015/16	1,800.0	1,894.4	47.8	1,846.6	25.3
2016/17	2,050.0	2,135.7	48.3	2,087.4	26.0
2017/18	2,250.0	2,260.5	48.6	2,211.9	54.8
2018/19	2,450.0	2,269.6	46.2	2,223.3	39.3
2019/20	2,200.0	2,551.2	47.0	2,504.2	42.1
2020/21	3,000.0	3,107.0	50.8	3,056.1	44.0
2021/22	2,800.0	2,922.0	59.4	2,862.6	57.2
2022/23 <sup>†</sup>	2,600.0	*	52.0	2,548.0	*

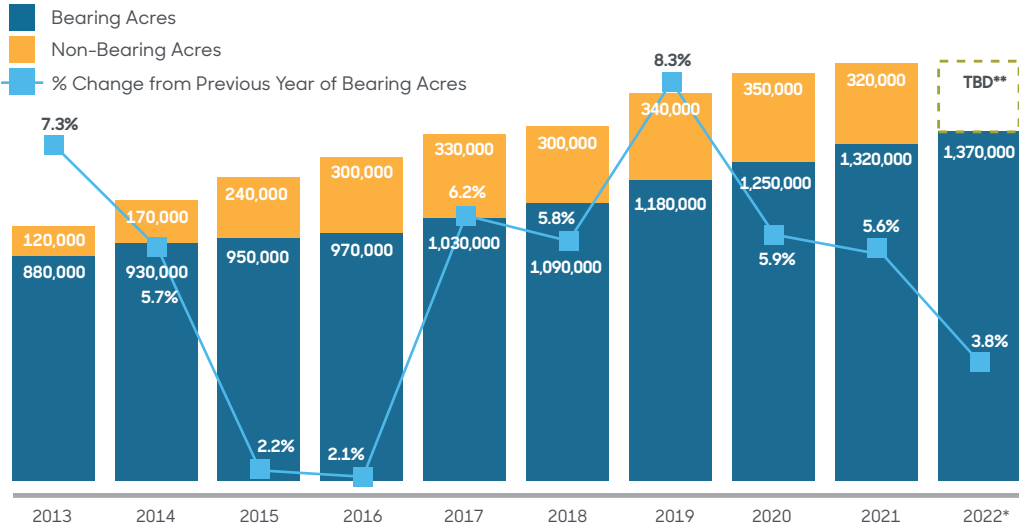
Source: Almond Board of California. Objective forecast provided by USDA-NASS Pacific Regional Office. \*Not available at time of publication. <sup>†</sup>Estimated.



# CROP

## CALIFORNIA ALMOND ACREAGE

2013-2022



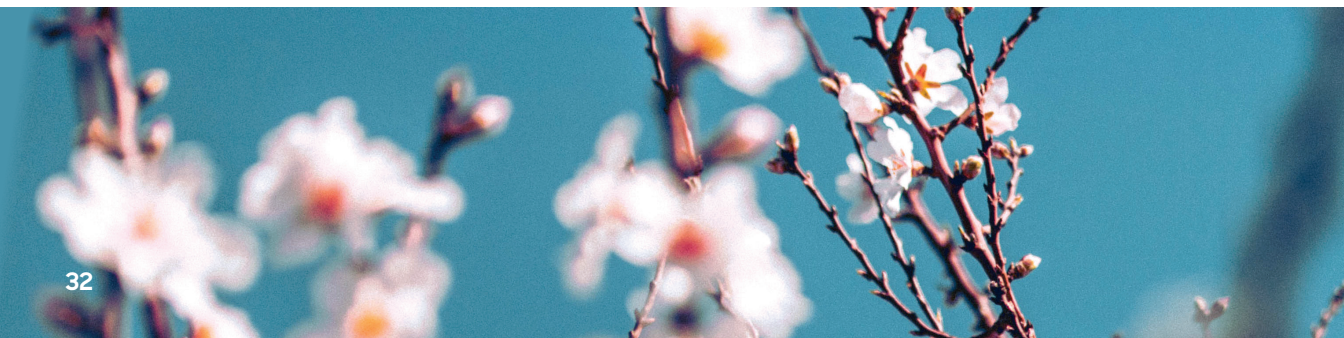
Source: USDA Agricultural Statistics Service, Pacific Region (NASS/PR) 2021 Acreage Report  
 \*Estimate \*\*Non-bearing acreage for 2022 available in April 2023.

## CALIFORNIA ALMOND ACREAGE + FARM VALUE

CROP YEARS 2013/14-2022/23

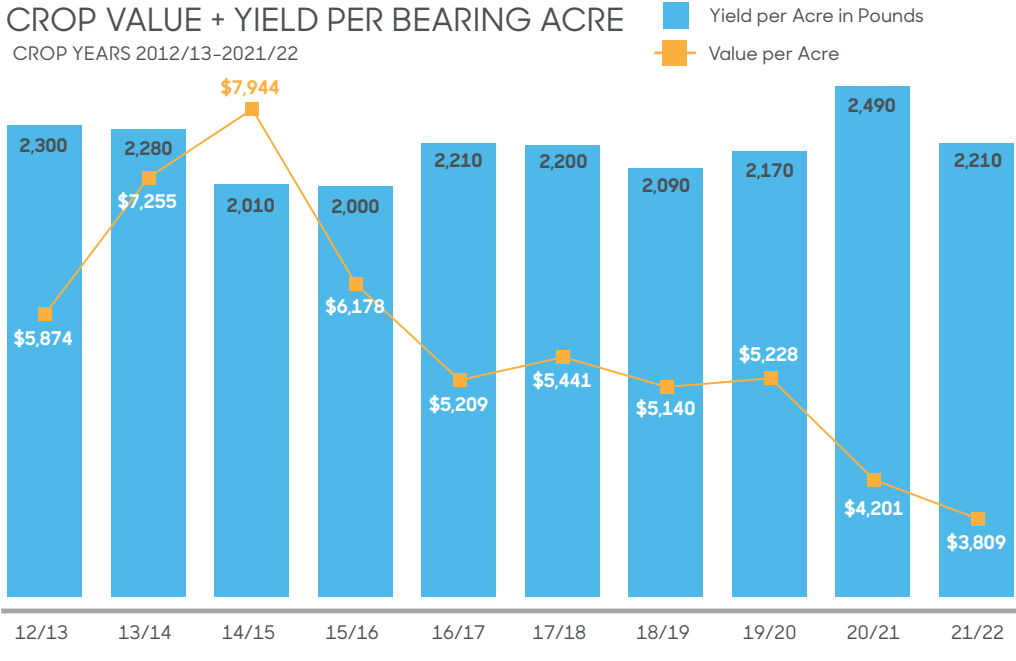
CROP YEAR	ACREAGE IN ACRES				YIELD		VALUE IN DOLLARS			
	BEARING	NON-BEARING	TOTAL	FIRST YEAR PLANTINGS	AVERAGE TREES PER ACRE	BEARING ACRE YIELD (LBS.)	PRODUCTION* (MILLION LBS.)	FARM PRICE	FARM VALUE (\$1,000)	VALUE PER BEARING ACRE
2013/14	880,000	120,000	1,000,000	40,865	112.0	2,280	2,010	\$3.21	\$6,384,690	\$7,255
2014/15	930,000	170,000	1,100,000	49,562	114.0	2,010	1,868	\$4.00	\$7,388,000	\$7,944
2015/16	950,000	240,000	1,190,000	58,368	114.0	2,000	1,894	\$3.13	\$5,868,750	\$6,178
2016/17	970,000	300,000	1,270,000	54,282	116.0	2,210	2,136	\$2.39	\$5,052,460	\$5,209
2017/18	1,030,000	330,000	1,360,000	45,832	117.0	2,200	2,260	\$2.53	\$5,603,950	\$5,441
2018/19	1,090,000	300,000	1,390,000	40,291	119.0	2,090	2,270	\$2.50	\$5,602,500	\$5,140
2019/20	1,180,000	340,000	1,520,000	25,988	122.0	2,170	2,551	\$2.45	\$6,169,100	\$5,228
2020/21	1,250,000	350,000	1,600,000	19,873	122.0	2,490	3,107	\$1.71	\$5,251,410	\$4,201
2021/22	1,320,000	320,000	1,640,000	14,998	122.0	2,210	2,922	\$1.76	\$5,028,320	\$3,809
2022/23†	1,370,000	‡	‡	‡	122.5	1,900	2,600	§	§	§

Source: USDA, NASS/PRO. Note: Almond Board does not track prices. \*Production numbers provided by Almond Board of California.  
 †Estimated as of July 8, 2022. ‡Acreage statistics will be available in April 2023. §Value statistics will be available in July 2023.



### CROP VALUE + YIELD PER BEARING ACRE

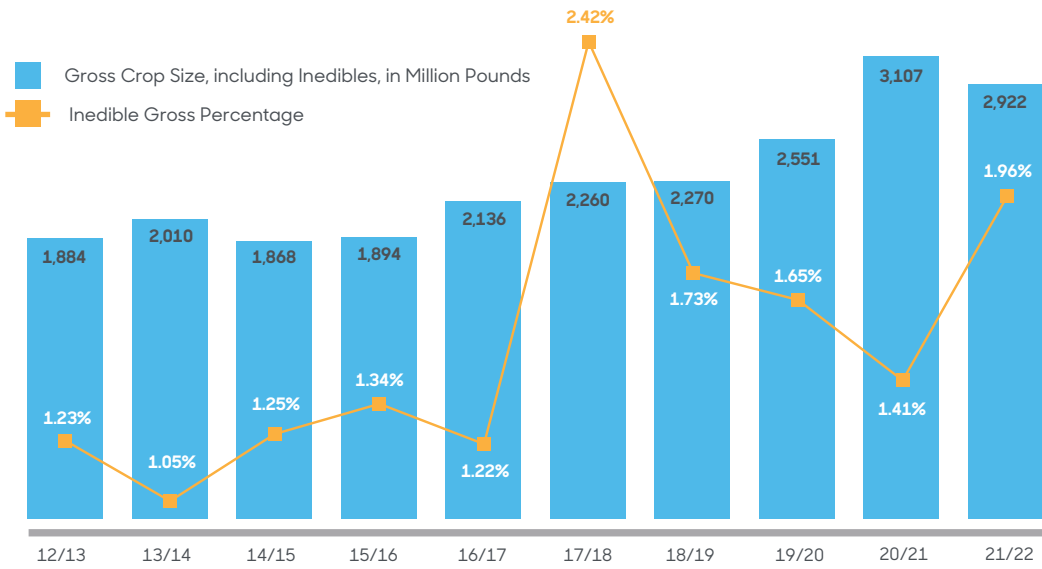
CROP YEARS 2012/13-2021/22



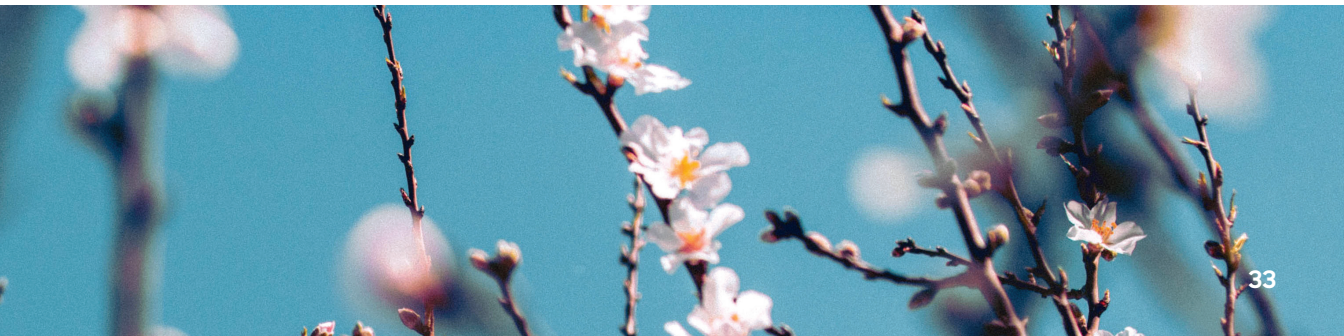
Source: USDA, NASS/PRO 2022 California Almond Objective Forecast.

### CALIFORNIA ALMOND CROP-SIZE HISTORY + INEDIBLE PERCENTAGE

CROP YEARS 2012/13-2021/22



Source: Almond Board of California.





## Did You Know?

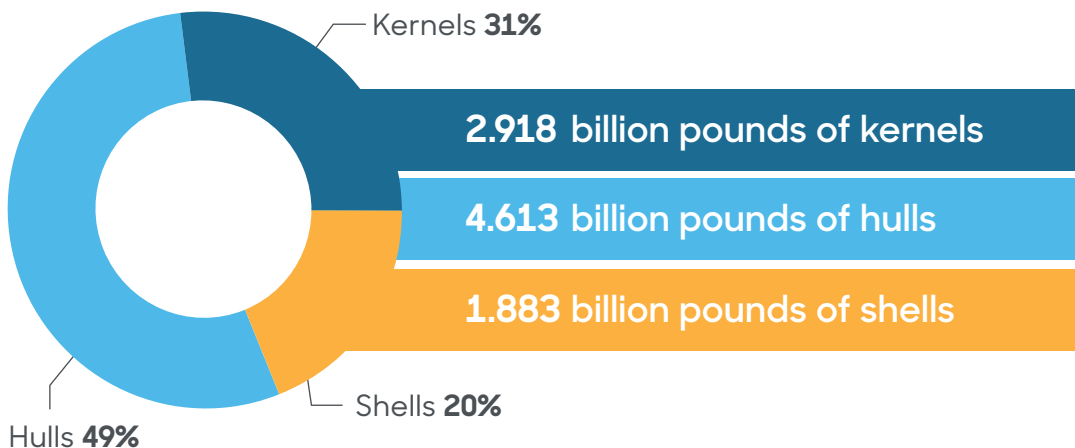
Almond hulls are the #1 farm byproduct fed to California's dairy cows. They provide 5-9% of cows' daily ration but could be used for up to 20%, reducing the need to grow other feed crops.





# CROP

ALMOND TREE FRUIT WEIGHT CROP YEAR 2021/22



Source: Kernel Weight—USDA Incomings received by Almond Board of California. Shell & Hull Estimations—Varietal Coproduct Ratios and Production Volumes (Almond Board of California 2022).

## CALIFORNIA ALMOND PRODUCTION BY COUNTY

CROP YEARS 2012/13–2021/22 | MILLION POUNDS

	COLUSA	GLENN	YOLO	BUTTE	TEHAMA	SOLANO	SUTTER	YUBA	STANISLAUS	MERCED	SAN JOAQUIN	FRESNO	KERN	MADERA	TULARE	KINGS	ALL OTHERS	TOTAL
	NORTHERN								CENTRAL			SOUTHERN						
<b>2012/13</b>	85.1	57.9	18.1	50.9	12.5	5.4	7.0		261.8	201.4	91.5	413.6	393.4	203.5	49.1	30.7	2.1	<b>1,884.1</b>
<b>2013/14</b>	103.6	69.7	22.5	56.0	14.7	6.0	7.3		284.9	213.8	95.9	398.1	427.2	216.9	55.8	32.6	1.9	<b>2,006.9</b>
<b>2014/15</b>	90.2	58.7	18.1	55.2	13.3	5.1	7.7		274.4	198.2	94.3	370.5	390.3	202.9	57.0	31.9	1.9	<b>1,869.7</b>
<b>2015/16</b>	109.7	75.4	27.3	57.4	16.0	6.0	7.4		260.7	188.7	97.2	376.5	366.1	215.2	53.9	32.4	2.3	<b>1,892.1</b>
<b>2016/17</b>	104.0	68.9	28.0	54.3	17.4	6.2	8.3		291.0	222.3	104.9	433.2	433.2	242.6	73.9	40.3	2.1	<b>2,130.6</b>
<b>2017/18</b>	112.9	72.6	39.7	52.1	18.6	8.4	8.7		303.2	223.7	108.7	494.4	429.5	264.0	80.9	43.6	2.4	<b>2,263.7</b>
<b>2018/19</b>	96.8	69.4	39.4	57.1	16.2	11.3	9.0		341.9	235.1	135.5	462.4	398.2	261.4	81.1	48.5	4.7	<b>2,268.1</b>
<b>2019/20</b>	113.6	63.5	55.8	43.2	18.4	14.5	10.4	1.3	302.3	223.4	124.4	598.3	491.7	298.9	116.4	68.8	6.8	<b>2,551.5</b>
<b>2020/21</b>	156.2	96.0	79.5	70.6	29.9	29.7	19.3	2.7	437.2	305.9	177.9	655.5	495.7	351.3	120.1	78.9	8.5	<b>3,114.9</b>
<b>2021/22</b>	117.7	77.0	65.2	51.4	28.1	31.3	18.3	2.9	414.5	294.1	181.0	610.3	473.6	333.8	134.0	74.7	10.4	<b>2,918.5</b>

Source: USDA Incoming Receipts.

# CROP

## CALIFORNIA ALMOND RECEIPTS BY COUNTY + VARIETY

CROP YEAR 2021/22 | IN POUNDS

COUNTIES	% CROP	NONPAREIL	MONTEREY	INDEPEN- DENCE	BUTTE/ PADRE	CARMEL	FRITZ	ALL OTHERS	ALL VARIETIES
<b>NORTHERN</b>									
BUTTE	1.8%	23,415,527	2,997,327	2,085,175	2,348,274	3,680,796	306,948	16,600,328	51,434,375
COLUSA	4.0%	54,161,797	13,398,130	3,413,745	1,760,374	9,340,853	5,099,212	30,572,896	117,747,007
GLENN	2.6%	39,811,555	5,711,975	1,474,610	2,079,655	6,518,756	560,331	20,867,564	77,024,446
SOLANO	1.1%	9,640,695	2,067,438	11,367,329	455,852	1,239,397	9,009	6,476,369	31,256,089
SUTTER	0.6%	6,203,140	2,313,131	3,355,474	809,058	750,389	44,592	4,840,529	18,316,313
TEHAMA	1.0%	14,684,061	1,981,156	695,981	980,969	3,303,044	22,181	6,412,495	28,079,887
YOLO	2.2%	27,880,245	9,345,321	6,515,713	1,371,910	3,108,417	607,466	16,325,433	65,154,505
YUBA	0.1%	964,916	187,850	1,195,135	42,608	63,514	28,986	455,352	2,938,361
OTHERS	0.2%	2,577,810	386,506	2,235,313	123,199	149,945	23,304	1,031,837	6,527,914
<b>TOTALS:</b>	<b>13.6%</b>	<b>179,339,746</b>	<b>38,388,834</b>	<b>32,338,475</b>	<b>9,971,899</b>	<b>28,155,111</b>	<b>6,702,029</b>	<b>103,582,803</b>	<b>398,478,897</b>
<b>CENTRAL</b>									
MERCED	10.1%	107,097,217	45,024,249	35,226,205	26,904,444	14,711,039	9,241,330	55,927,502	294,131,986
SAN JOAQUIN	6.2%	60,265,947	10,646,131	42,115,420	12,842,730	15,378,712	4,643,170	35,074,396	180,966,506
STANISLAUS	14.2%	140,901,611	33,716,081	78,882,653	33,444,628	34,133,708	10,081,425	83,377,854	414,537,960
OTHERS	0.1%	1,009,287	429,408	952,658	0	214,801	6,886	429,046	3,042,086
<b>TOTALS:</b>	<b>30.6%</b>	<b>309,274,062</b>	<b>89,815,869</b>	<b>157,176,936</b>	<b>73,191,802</b>	<b>64,438,260</b>	<b>23,972,811</b>	<b>174,808,798</b>	<b>892,678,538</b>
<b>SOUTHERN</b>									
FRESNO	20.9%	226,033,894	131,441,793	74,658,613	48,391,404	7,250,093	14,828,015	107,718,236	610,322,048
KERN	16.2%	202,797,701	132,130,899	23,035,275	37,113,733	6,202,788	27,223,325	45,137,778	473,641,499
KINGS	2.6%	26,471,688	18,174,067	13,025,809	6,840,453	46,646	1,463,324	8,679,301	74,701,288
MADERA	11.4%	135,933,777	75,696,126	13,956,991	27,545,810	9,157,256	11,577,144	59,971,915	333,839,019
TULARE	4.6%	51,622,829	33,435,645	25,913,041	5,560,846	1,126,391	5,549,348	10,801,719	134,009,819
OTHERS	0.0%	183,148	294,844	124,931	14,502	0	63,973	134,326	815,724
<b>TOTALS:</b>	<b>55.8%</b>	<b>643,043,037</b>	<b>391,173,374</b>	<b>150,714,660</b>	<b>125,466,748</b>	<b>23,783,174</b>	<b>60,705,129</b>	<b>232,443,275</b>	<b>1,627,329,397</b>
<b>GRAND TOTAL</b>	<b>100.0%</b>	<b>1,131,656,845</b>	<b>519,378,077</b>	<b>340,230,071</b>	<b>208,630,449</b>	<b>116,376,545</b>	<b>91,379,969</b>	<b>510,834,876</b>	<b>2,918,486,832</b>

\* Totals may not add precisely due to rounding

Source: USDA Incoming Receipts.

Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre.

### Did You Know?

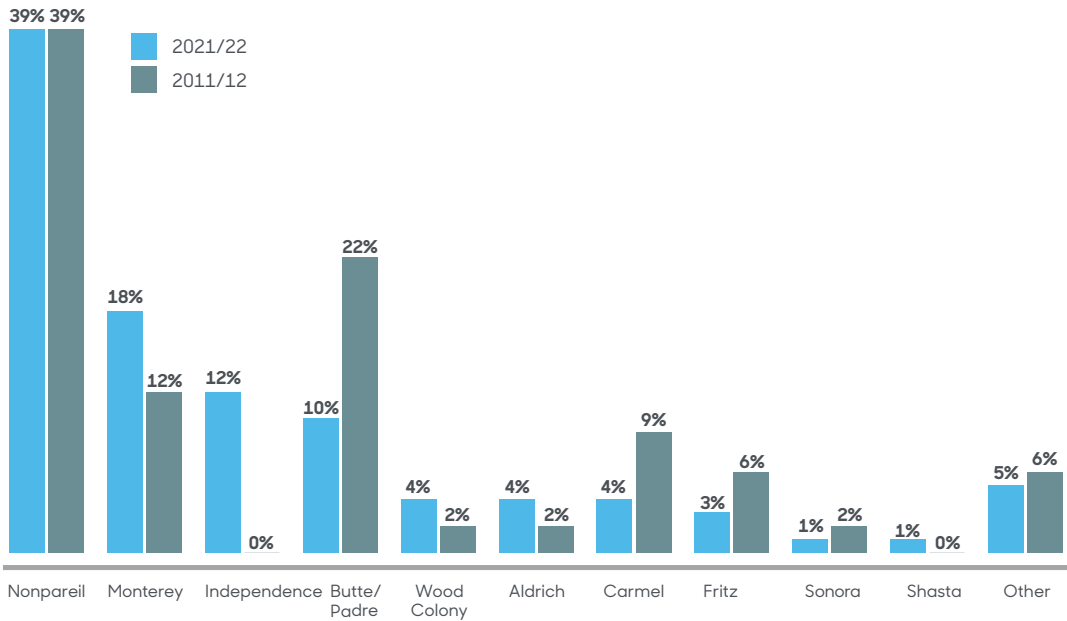
California is one of five places on earth with the Mediterranean climate needed to grow almonds.





## TOP TEN ALMOND-PRODUCING VARIETIES

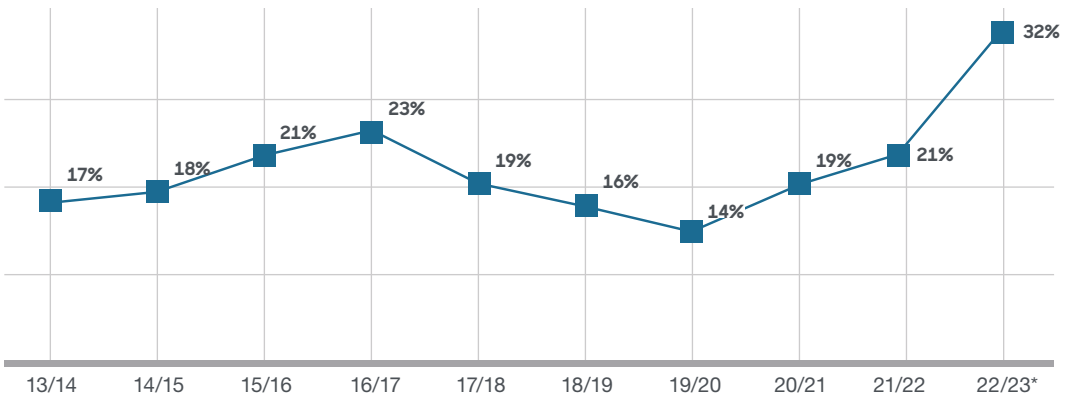
CROP YEARS 2011/12 VS. 2021/22



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

## CARRY-IN AS A PERCENTAGE OF PRIOR YEAR SHIPMENTS

CROP YEARS 2013/14–2022/23



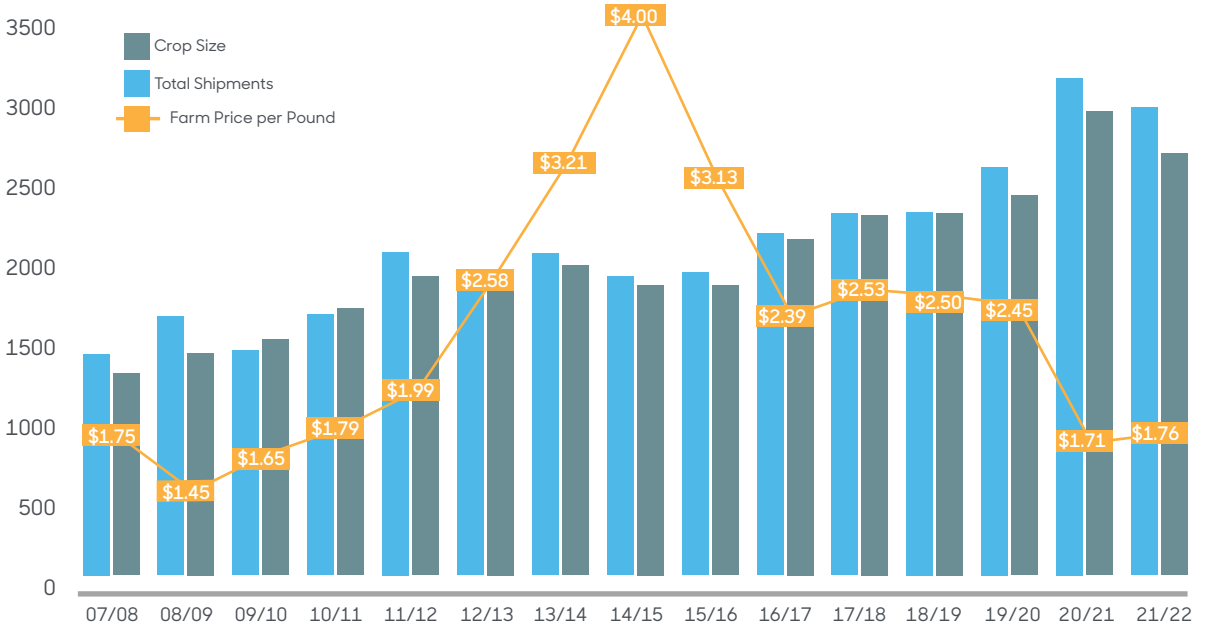
Source: Almond Board of California. \*Forecasted.



# CROP + SHIPMENTS

## HISTORICAL CROP SIZE + SHIPMENTS VS. FARM PRICE

CROP YEARS 2007/08-2021/22 | MILLION POUNDS



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

## POSITION REPORT OF CALIFORNIA ALMONDS

CROP YEARS 2013/14-2022/23 | MILLION POUNDS

CROP YEAR	REDETERMINED MARKETABLE WEIGHT	CARRY-IN	RESERVE	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS	TOTAL SHIPMENTS	SALABLE CARRY-OVER
2013/14	1,970.0	317.2	N/A	2,287.2	641.8	1,295.6	1,937.4	350.6
2014/15	1,838.6	350.6	N/A	2,189.2	639.4	1,173.1	1,812.5	376.6
2015/16	1,846.6	376.6	N/A	2,223.2	593.2	1,218.0	1,811.2	412.0
2016/17	2,087.4	412.0	N/A	2,499.4	676.0	1,425.0	2,101.0	398.7
2017/18	2,211.9	398.7	N/A	2,610.6	734.7	1,516.8	2,251.5	359.0
2018/19	2,223.3	359.0	N/A	2,582.3	741.2	1,522.9	2,264.0	318.3
2019/20	2,504.2	318.3	N/A	2,822.5	774.3	1,598.2	2,372.4	450.1
2020/21	3,056.1	450.1	N/A	3,506.2	808.1	2,090.0	2,898.1	608.1
2021/22	2,862.6	608.1	N/A	3,470.7	764.6	1,869.3	2,633.9	836.8
2022/23*	2,548.0	836.8	N/A	3,384.8	807.6	1,977.2	2,784.8	600.0

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





WORLD DESTINATIONS

CROP YEARS 2017/18-2021/22 | MILLION POUNDS

Destination		2017/18	2018/19	2019/20	2020/21	2021/22
<b>Americas</b>						
North America	Canada	58.30	60.52	59.59	62.93	62.89
	Mexico	22.17	23.55	24.23	30.21	29.19
<b>TOTAL NORTH AMERICA</b>		<b>80.50</b>	<b>84.08</b>	<b>83.85</b>	<b>93.25</b>	<b>92.15</b>
Latin America/ Caribbean	Argentina	2.31	0.35	1.40	3.29	2.33
	Brazil	3.81	2.46	4.97	7.92	4.71
	Chile	6.50	5.40	7.30	11.89	10.67
	Colombia	3.44	3.51	5.17	7.04	7.38
	Costa Rica	0.81	1.08	1.29	1.31	1.44
	Dominican Republic	0.37	0.39	0.27	0.55	0.54
	Peru	2.11	1.59	3.20	4.95	2.51
	Trinidad	0.69	0.68	0.60	0.82	0.93
<b>TOTAL LAT AMER/CARIBBEAN</b>		<b>20.88</b>	<b>16.88</b>	<b>24.97</b>	<b>39.22</b>	<b>31.78</b>
<b>TOTAL AMERICAS</b>		<b>101.38</b>	<b>100.96</b>	<b>108.83</b>	<b>132.47</b>	<b>123.93</b>
<b>Asia-Pacific</b>						
Northeast Asia	China/Hong Kong	169.78	128.09	98.55	162.35	127.30
	Japan	78.80	81.28	84.95	92.02	95.06
	South Korea	50.84	56.92	56.10	76.68	65.41
	Taiwan	9.61	9.34	9.95	13.75	10.79
<b>TOTAL NORTHEAST ASIA</b>		<b>309.04</b>	<b>275.63</b>	<b>249.55</b>	<b>344.80</b>	<b>298.57</b>
Southeast Asia	Indonesia	3.38	4.63	4.26	5.38	6.72
	Malaysia	7.02	9.34	8.68	10.42	8.30
	Philippines	0.49	0.56	0.55	1.10	1.34
	Singapore	4.08	3.85	4.14	5.34	4.76
	Thailand	5.19	7.33	8.25	9.46	10.98
	Vietnam	55.17	57.23	14.38	34.02	27.39
<b>TOTAL SOUTHEAST ASIA</b>		<b>75.35</b>	<b>83.02</b>	<b>40.36</b>	<b>65.77</b>	<b>59.55</b>
South/Central Asia	Afghanistan	1.38	2.27	2.83	2.48	4.51
	Bangladesh	0.40	0.13	0.48	2.92	1.47
	India	199.52	231.35	255.77	362.07	352.67
	Kazakhstan	7.77	7.87	8.92	10.95	5.40
	Nepal	0.15	0.54	0.96	1.80	1.09
	Pakistan	11.82	9.69	10.18	11.44	9.54
<b>TOTAL SOUTH/CENTRAL ASIA</b>		<b>221.83</b>	<b>251.88</b>	<b>279.15</b>	<b>391.80</b>	<b>375.00</b>
Australasia/Oceania	Australia	3.82	5.73	3.32	2.60	2.56
	New Zealand	3.36	3.70	3.93	4.73	2.83
	<b>TOTAL AUSTRALASIA/OCEANIA</b>		<b>7.22</b>	<b>9.46</b>	<b>7.34</b>	<b>7.34</b>
<b>TOTAL ASIA-PACIFIC</b>		<b>613.45</b>	<b>620.00</b>	<b>576.39</b>	<b>809.70</b>	<b>738.50</b>
<b>Europe</b>						
Western Europe	Belgium	20.76	24.53	22.32	23.30	23.27
	Denmark	8.23	7.48	7.55	8.61	10.55
	France	29.21	30.02	30.52	34.85	21.90
	Germany	134.33	110.46	133.93	157.11	119.13
	Greece	10.27	11.40	12.16	17.13	12.94
	Ireland	0.60	0.64	0.74	0.78	0.78
	Italy	68.38	67.06	76.67	96.79	83.60
	Netherlands	52.04	72.19	73.76	93.64	103.55
	Norway	6.43	5.60	7.03	7.03	5.00
	Portugal	2.46	1.99	1.54	1.48	1.31
	Spain	203.36	195.64	192.56	238.94	226.99
	Sweden	7.31	7.20	7.76	6.22	6.32
	Switzerland	4.82	5.01	2.23	1.94	2.69
<b>TOTAL WESTERN EUROPE</b>		<b>583.04</b>	<b>572.65</b>	<b>603.43</b>	<b>729.92</b>	<b>646.16</b>
Central/ Eastern Europe	Bulgaria	2.19	2.24	2.88	2.19	2.10
	Croatia	2.15	3.03	4.47	5.70	3.24
	Czech Republic	1.84	1.80	1.89	2.04	1.06
	Estonia	11.45	8.54	12.26	19.41	11.58
	Georgia	0.22	1.38	2.09	2.85	1.93
	Latvia	5.52	2.51	1.57	2.12	2.74
	Lithuania	4.22	4.79	6.07	9.34	6.36
	Poland	3.83	4.39	3.98	7.34	5.52
	Romania	0.71	0.70	0.48	0.69	0.67
	Russia	1.34	1.75	0.86	0.09	0.52
Ukraine	1.75	2.84	3.90	7.29	2.98	
<b>TOTAL CENTRAL/E. EUROPE</b>		<b>36.91</b>	<b>35.43</b>	<b>42.50</b>	<b>62.03</b>	<b>40.61</b>
<b>TOTAL EUROPE</b>		<b>619.95</b>	<b>608.08</b>	<b>645.93</b>	<b>791.95</b>	<b>686.77</b>
<b>Middle East/Africa</b>						
Middle East	Bahrain	1.50	1.69	1.73	1.47	1.33
	Cyprus	1.21	1.22	1.29	1.22	0.97
	Iraq	0.96	1.24	1.22	1.22	1.22
	Israel	8.75	11.53	14.51	15.65	13.02
	Jordan	9.49	11.40	12.62	12.79	14.80
	Kuwait	3.72	4.87	3.36	3.70	3.76
	Lebanon	6.35	7.45	3.96	3.82	3.14
	Qatar	2.10	2.92	2.21	1.84	1.50
	Saudi Arabia	14.74	20.27	23.15	23.07	19.14
	Turkey	51.74	36.14	61.38	66.70	67.31
United Arab Emirates	63.54	69.01	86.32	122.62	122.58	
<b>TOTAL MIDDLE EAST</b>		<b>164.28</b>	<b>167.92</b>	<b>212.29</b>	<b>254.80</b>	<b>249.25</b>
North Africa	Algeria	5.28	7.58	9.74	8.48	10.10
	Egypt	2.25	4.08	7.51	8.97	4.16
	Libya	0.39	0.84	2.16	8.79	5.90
	Morocco	3.66	7.12	28.06	65.86	40.21
<b>TOTAL NORTH AFRICA</b>		<b>11.84</b>	<b>19.96</b>	<b>48.15</b>	<b>93.29</b>	<b>60.62</b>
Sub-Saharan Africa	South Africa	5.68	5.56	6.12	7.45	9.77
<b>TOTAL SUB-SAHARAN AFRICA</b>		<b>5.89</b>	<b>5.93</b>	<b>6.57</b>	<b>7.83</b>	<b>10.22</b>
<b>TOTAL MIDDLE EAST/AFRICA</b>		<b>182.01</b>	<b>193.81</b>	<b>267.01</b>	<b>355.92</b>	<b>320.10</b>
Total Shipments	<b>TOTAL EXPORT SHIPMENTS:</b>	<b>1,516.79</b>	<b>1,522.85</b>	<b>1,598.16</b>	<b>2,090.05</b>	<b>1,869.30</b>
	<b>TOTAL U.S. SHIPMENTS:</b>	<b>734.73</b>	<b>741.17</b>	<b>774.25</b>	<b>808.08</b>	<b>764.64</b>
	<b>TOTAL GLOBAL SHIPMENTS:</b>	<b>2,251.52</b>	<b>2,264.02</b>	<b>2,372.41</b>	<b>2,898.13</b>	<b>2,633.95</b>

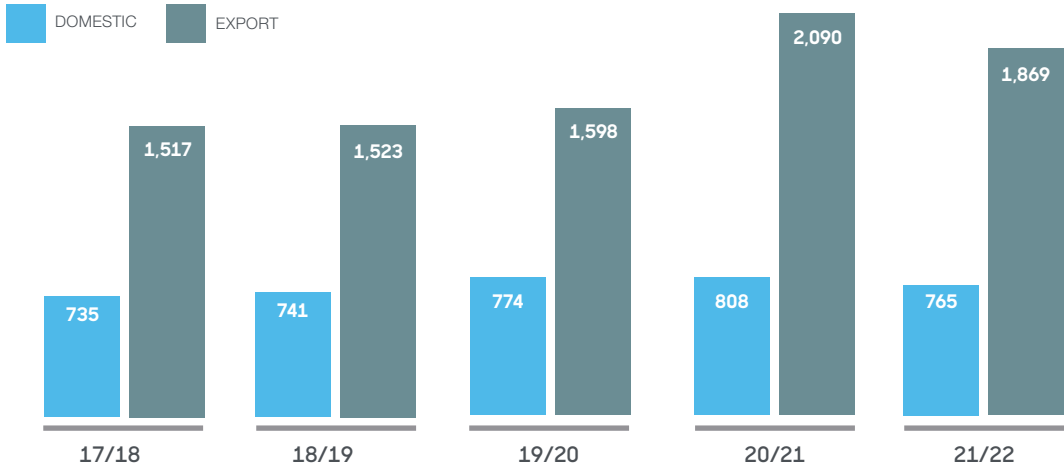
Source: Almond Board of California.

Note: Totals may not add precisely due to rounding. Destinations that shipped more than 500,000 pounds in crop year 2021/22 are listed.

# SHIPMENTS

## DOMESTIC + EXPORT SHIPMENTS

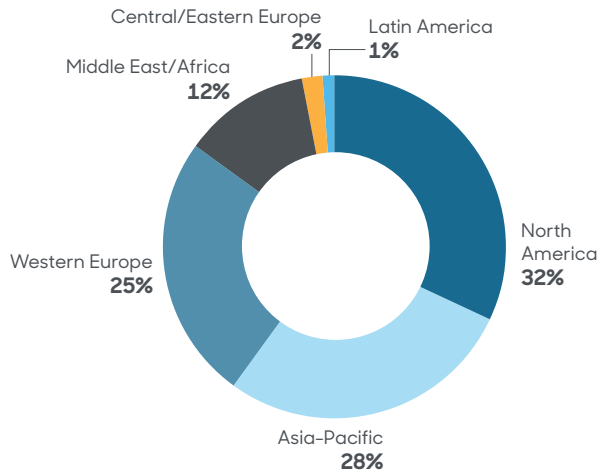
CROP YEARS 2017/18–2021/22 | MILLION POUNDS



Source: Almond Board of California.

## SHIPMENTS BY REGION

CROP YEAR 2021/22



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

## Did You Know?

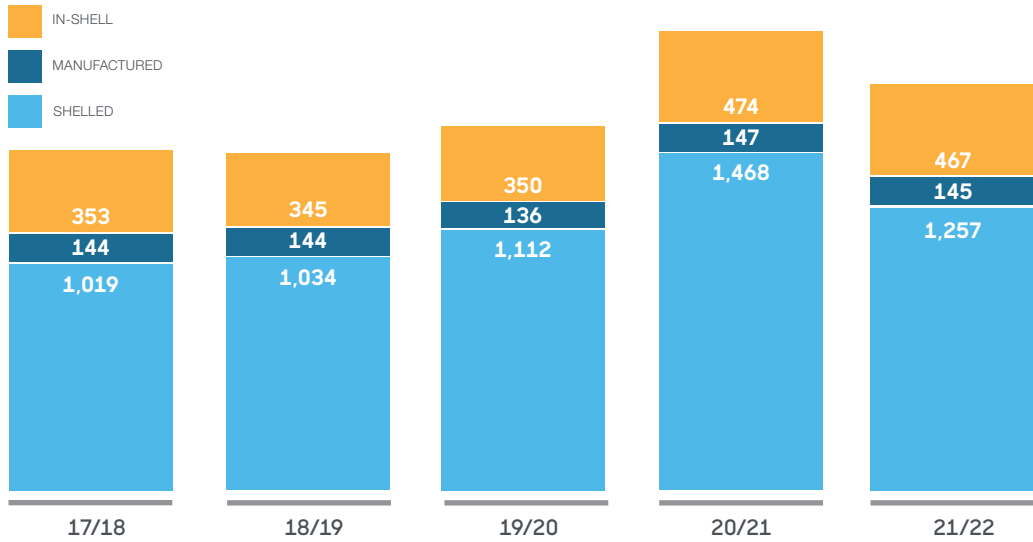
Almond farmers **reduced the amount of water** needed to grow each pound of almonds **by 33%** between the 1990s and 2010s<sup>1</sup>. What's more, they're working on an **additional 20% by 2025**.

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



## EXPORT SHIPMENTS BY PRODUCT TYPE

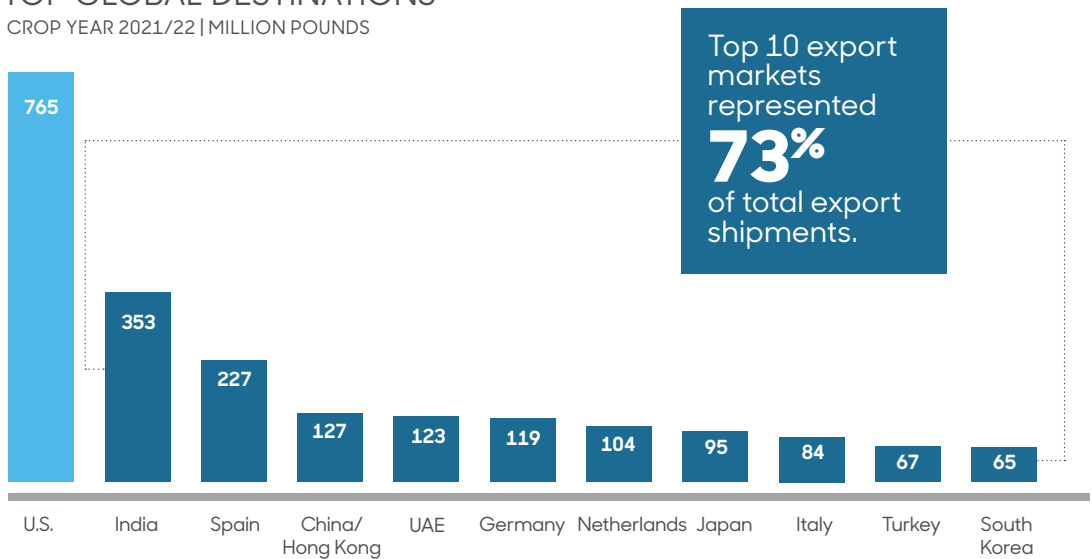
CROP YEARS 2017/18–2021/22 | MILLION POUNDS



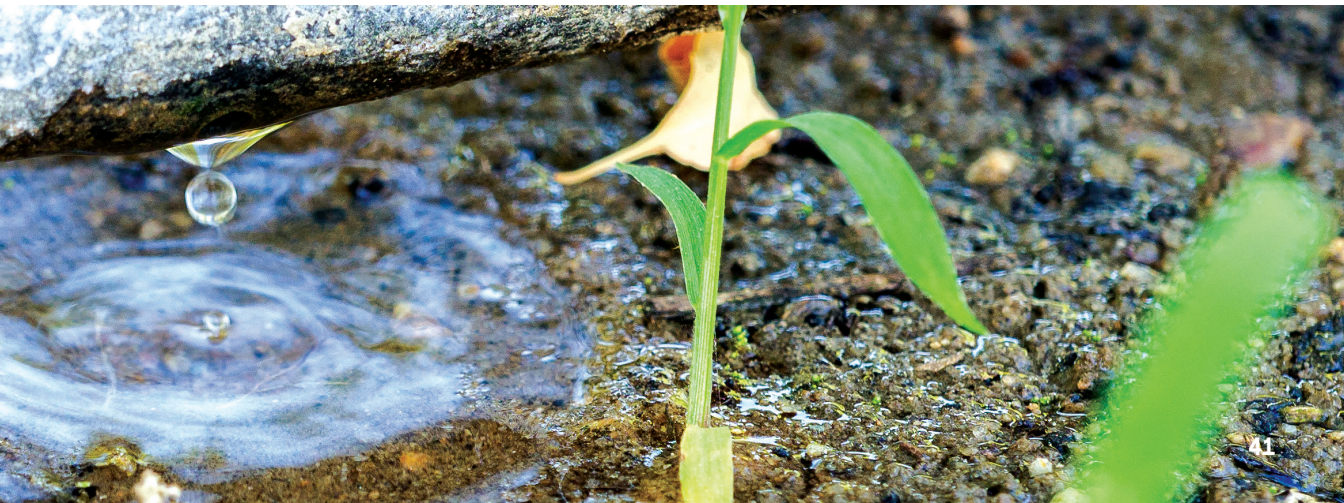
Source: Almond Board of California.

## TOP GLOBAL DESTINATIONS

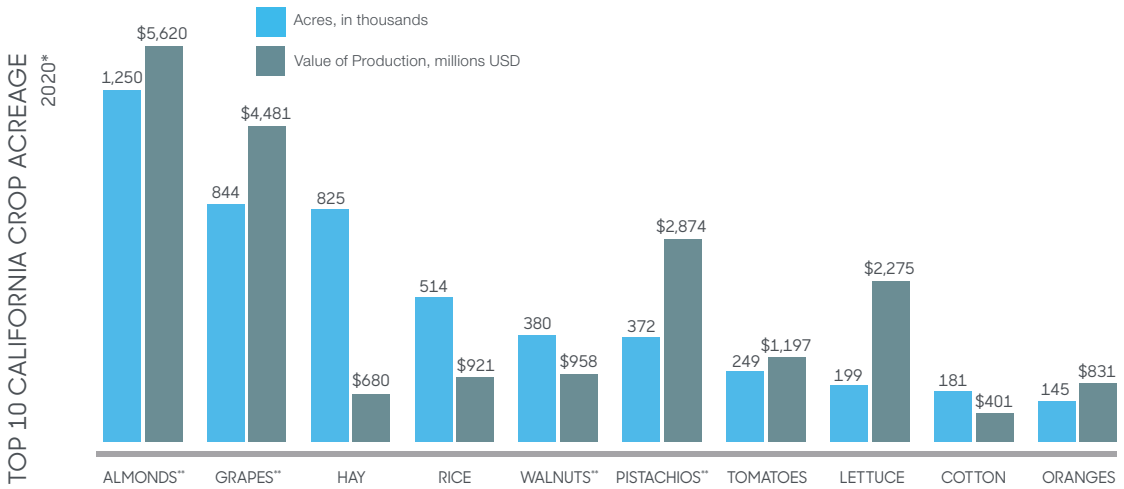
CROP YEAR 2021/22 | MILLION POUNDS



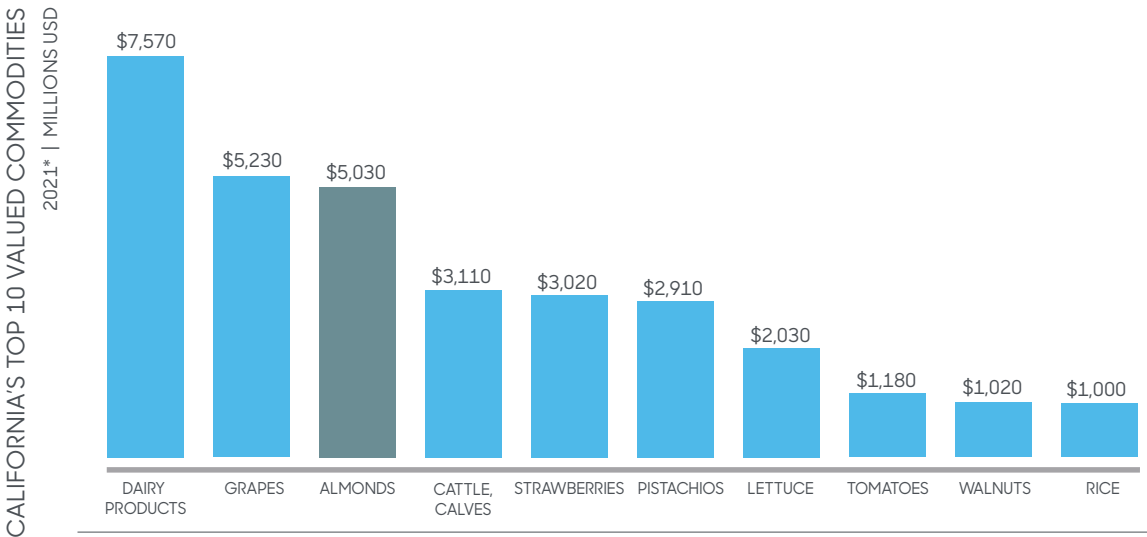
Source: Almond Board of California July 2022 Position Report.



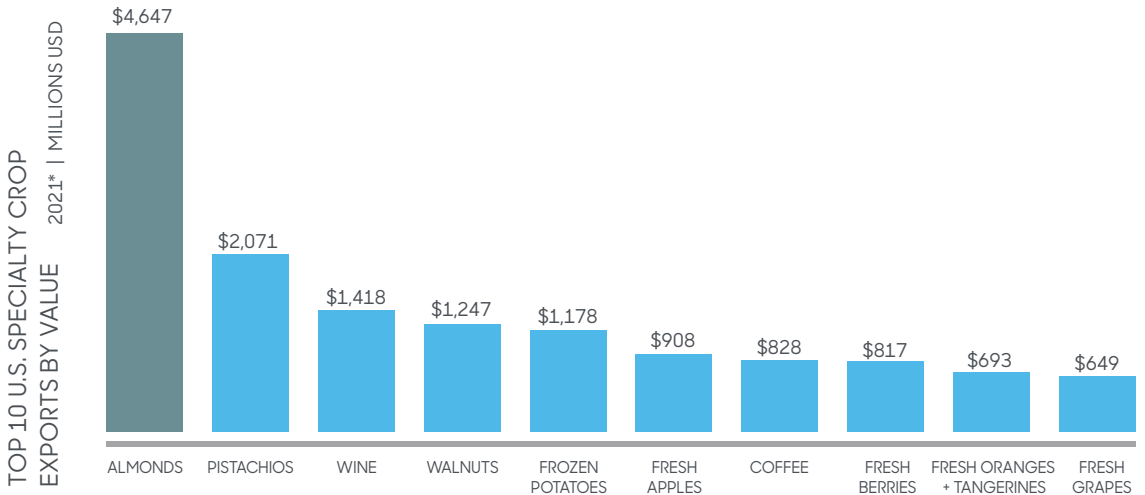
# ALMONDS + OTHER CROPS



Source: CDFA, California Agricultural Statistics Review.  
 \*Calendar year January through December 2020. Value based on farm-gate prices. \*\*Bearing acreage.



Source: California Department of Food and Agriculture: California Agricultural Production Statistics. [cdfa.ca.gov/Statistics](http://cdfa.ca.gov/Statistics)  
 \*Calendar year January through December 2021.

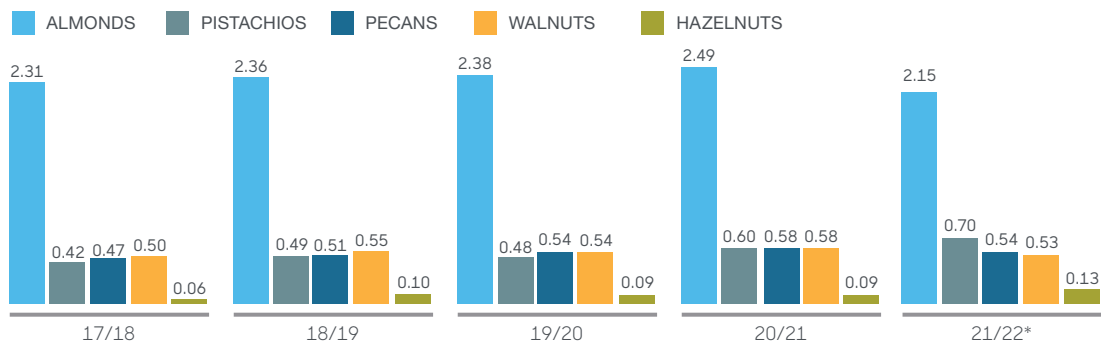


Source: USDA Foreign Agricultural Services Global Agricultural Trade System. \*Calendar year January through December 2021.



### DOMESTIC PER CAPITA CONSUMPTION OF TREE NUTS

CROP YEARS 2017/18–2021/22 | POUNDS PER CAPITA



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

### U.S. PRODUCTION + IMPORTS OF COMPETING NUTS

CROP YEARS 2012/13–2021/22 | MILLION POUNDS (SHELLED BASIS)

CROP YEAR	ALMONDS		WALNUTS		HAZELNUTS		PECANS		PISTACHIOS		MACADAMIAS		ALL TREE NUTS	
	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports
2012/13	1,844.0	39.4	442.1	8.4	28.4	15.2	140.8	79.3	278.3	1.2	20.0	111.1	<b>2,753.5</b>	<b>515.6</b>
2013/14	2,009.7	33.9	437.7	11.9	36.9	14.5	130.8	92.5	234.5	0.5	18.6	112.5	<b>2,868.2</b>	<b>582.1</b>
2014/15	1,867.9	31.2	506.1	21.2	26.1	10.9	128.1	104.0	246.3	0.9	20.9	133.8	<b>2,795.4</b>	<b>666.9</b>
2015/16	1,894.4	31.8	527.0	10.8	23.3	9.2	104.5	113.7	134.6	1.2	21.4	155.5	<b>2,705.1</b>	<b>668.1</b>
2016/17	2,135.7	26.6	608.4	15.7	35.1	11.5	127.9	132.6	446.3	1.4	19.1	137.6	<b>3,372.6</b>	<b>697.2</b>
2017/18	2,260.5	32.5	557.1	12.7	25.6	13.8	141.1	137.1	226.9	1.6	22.3	171.9	<b>3,233.5</b>	<b>738.8</b>
2018/19	2,269.6	32.3	601.5	2.6	40.8	16.8	104.5	166.0	487.5	1.3	16.0	256.0	<b>3,518.9</b>	<b>720.2</b>
2019/20	2,551.2	26.3	559.2	2.7	36.0	13.5	134.7	153.8	370.7	1.6	18.5	207.5	<b>3,670.4</b>	<b>755.9</b>
2020/21	3,107.0	21.6	705.2	2.1	49.4	10.6	152.0	137.7	526.6	3.1	18.2	148.3	<b>4,558.3</b>	<b>705.4</b>
2021/22*	2,922.0	22.2	637.0	3.2	62.0	10.3	127.7	121.2	580.0	2.2	23.2	159.2	<b>4,352.8</b>	<b>789.9</b>

Sources: USDA, Economic Research Service, Fruit & Tree Nut Yearbook Tables. Note: Crop totals represent utilized production. Almond crop totals are from Almond Board of California's year-end Position Report. \*Preliminary.



# DOING MORE THROUGH COLLABORATION



Since 2013, the Almond Board of California and Almond Alliance 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 2022, we worked together to tackle issues facing the industry such as shipping and logistics, pollinators, water availability, air quality and more.



## LOGISTICS CRISIS

Disruptions in the global supply chain impacted carrier service and reliability, and equipment availability caused a congestion ripple that was felt throughout the almond industry. Less product was able to be exported causing a backup of product in warehouses, leading to delayed payments to handlers and causing cash flow concerns down to the grower. Additionally, other global forces within the supply chain led to a spike in input costs. In response, Almond Alliance helped lead the charge for action in the passage of the Ocean Shipping Reform Act, and by calling on the Administration to act and bring all ocean carriers together to help devise solutions to congestion problems. Almond Alliance also brought together a coalition of rail lines and ocean carriers to devise a new option of railing product from Oakland to the ports of Los Angeles and Long Beach for export.



## WATER AND DROUGHT

As growers confront water limitations due to California’s Sustainable Groundwater Management Act, they have also had to weather a multi-year drought and surface-water shortages. Priorities were developed for federal and state budgets to provide opportunities to improve above- and below-ground water storage, conveyance and efficiency incentives.

A close-up photograph of several green almond leaves with prominent veins, set against a clear blue sky.

**LOOKING TO 2023** With aligned interests, the Almond Board of California and Almond Alliance will remain focused on current priorities and expand efforts to educate policymakers on key trade initiatives and Farm Bill provisions and the role they play in California, the U.S. and around the world.



# KEY RESOURCES FOR GROWERS + HANDLERS

## KEY ONLINE RESOURCES



**GROWER TOOLS:** A one-stop shop to find PDFs and videos for growers—from incentive programs to tools for irrigation, crop protection, pollination and dust reduction. We also provide growers with information on trade and regulations, as well as the California Almond Stewardship Platform (CASP).



**ORCHARD MANAGEMENT TOOLS:** The orchard is where it all begins. We've compiled all the information you need to apply good agricultural practices, optimize your irrigation and pollination, guide you through your harvest and help you keep tabs on your soil health. And we've compiled a section for new growers to get your almond orchard off the ground.



**GUIDE TO CALIFORNIA ALMONDS:** An overview of almond varieties, sizes, forms, USDA standards and grades.

## YEAR-ROUND RESOURCES



**PROGRAMS AND EVENTS:** The Almond Board of California offers outreach and educational activities designed to share the innovative farming practices that will be required to meet the future needs of the California almond community. From the California Almond Leadership Program to Almond Board committee and workgroup meetings, there's a way for everyone to get involved.



**TUNE IN:** On the *Almond Journey Podcast*, the Almond Board explores how growers, handlers and other stakeholders are making things work in their operations to drive the almond industry forward. Hearing the voices of these industry leaders might spark a connection or idea. That's why the Almond Board features stories of innovation, resilience and community on this podcast. Listen now by searching "Almond Journey" wherever you get your podcasts.

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