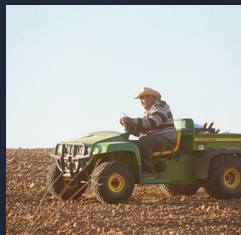
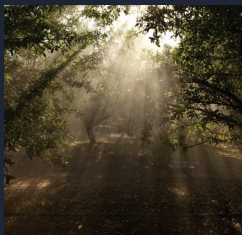




THE ALMOND ALMANAC



2024





CONGRATULATIONS TO THE CLASS OF 2024



Ziv Attia, Andy Barahate, Gurajan Brar, Matthew Brocato, Mark Cavallero, Zachary Days, Mallory Dodds, Ryan Hackett, Brandon Heinrich, Amanda Hernandez, Victoria Lee, Sutter Long, Antonio Lopez, Ryan McCoon, Edgar Perez, Jeevan Sandhu, Erik Stanek, Delaney Woolwine

The Almond Leadership Program (ALP), founded in 2009, 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. Last crop year, 25 ALP alums served as members of either the Board of Directors or a committee. Since its inception, the ALP has raised more than \$320,000 for California FFA scholarships.



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, #5 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.

INTRODUCING THE CALIFORNIA ALMOND COMMUNITY

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ALMOND BOARD OF CALIFORNIA PROGRAMS

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CALIFORNIA ALMOND FACTS AND FIGURES

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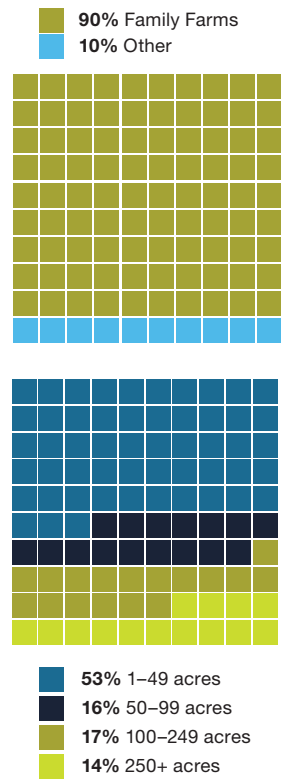


The statistical analyses found in the *Almanac* are prepared on a crop-year basis, spanning August 1 through July 31, and include both current and historical information. The statistical content is compiled using handler forms required by the industry’s Federal Marketing Order. Additional data, including crop estimates and farm price, are supplied by the USDA National Agricultural Statistics Service, Pacific Region Field Office.

CALIFORNIA IS ONE OF FIVE PLACES ON EARTH WITH THE MEDITERRANEAN CLIMATE NEEDED TO GROW ALMONDS.

90% OF ALMOND FARMS ARE FAMILY FARMS

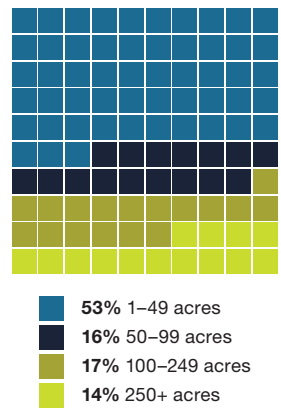
California is home to 7,600 almond farms, and 90% of those farms are family farms. Many of them are owned and operated by third- and fourth-generation farmers who live on their land and plan to pass it on to their children and grandchildren.



NEARLY 70% ARE 100 ACRES OR LESS

Small or large, California's almond farmers take the long 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 extraordinary commitment to environmental responsibility.

Source: USDA 2017 Census of Agriculture.

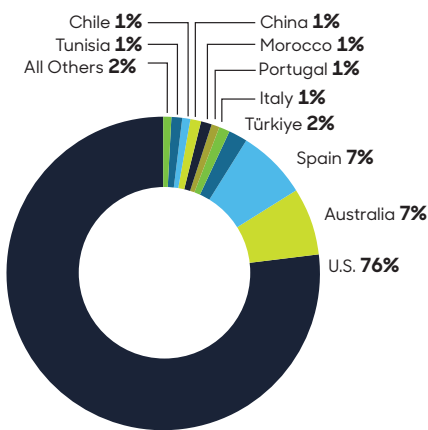


CALIFORNIA GROWS 76% OF THE WORLD'S ALMONDS.

Thanks to some of the best agricultural universities in the world, top research partners, water infrastructure and great soils, it is the most productive almond-growing region on the planet.

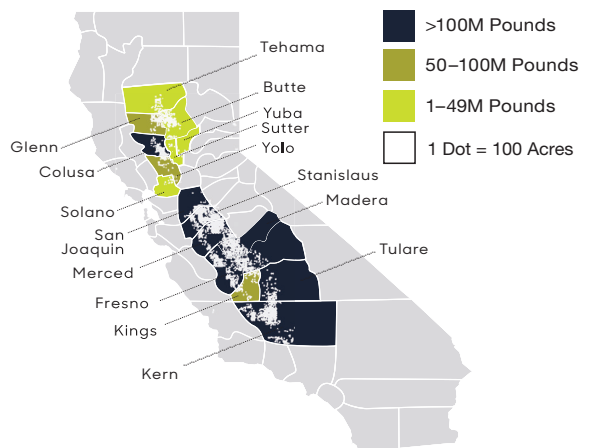
WORLD ALMOND PRODUCTION

crop year 2023/24*



CALIFORNIA ALMOND PRODUCTION

production by county | crop year 2023/24



Sources: Almond Board of California, Almond Board of Australia, AEOFRUSE, Portugal Nuts, Chilean Almond Board, Greek Nuts & Fruits Trade Association and other INC sources. *Totals may not add precisely due to rounding.

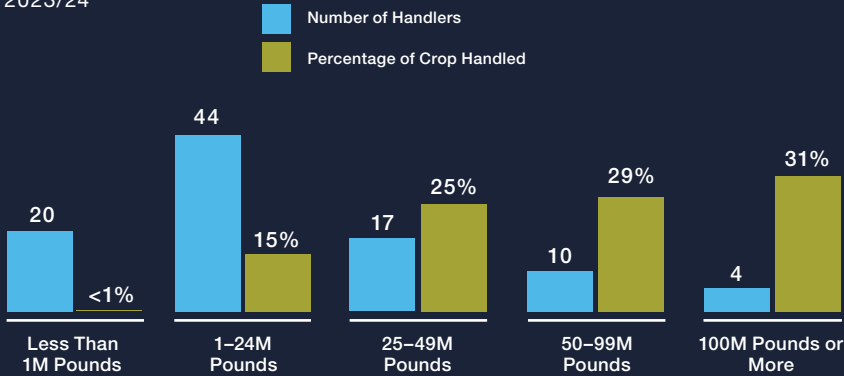


PROCESSING ALMONDS

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

DISTRIBUTION OF CROP BY HANDLER SIZE

crop year 2023/24



TOP 10 GLOBAL DESTINATIONS FOR CALIFORNIA ALMONDS

crop year 2023/24 | million pounds

The U.S. is the #1 global destination for California almonds in 2023/24, with a 27% share of shipments. India remains the #1 export destination for California almonds, with shipments in 2023/24 exceeding 400 million pounds, an increase of 21% from 2022/23.



Source: Almond Board of California July 2024 Position Report.

ABOUT THE ALMOND BOARD OF CALIFORNIA

The Almond Board of California was established in 1950. We are dedicated to promoting California almonds to both domestic and international audiences through strategic market development, global marketing programs, ensuring food safety, and funding and promoting research about almonds' health benefits, zero waste efforts and industry best practices. The Almond Board programs are funded by a per-pound assessment on all almonds grown in California.

2025 STRATEGIC PRIORITIES

DRIVE GLOBAL DEMAND FOR CALIFORNIA ALMONDS:

Drive value by investing in programs and research that meaningfully differentiate almonds across short- and long-term horizons.

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 industry members with information and resources that provide options available to maximize efficiency, profitability and overall value for their operations.

OPTIMIZE ALMOND BOARD VALUE:

Align exemplary leadership, engagement and efficiency at all Almond Board levels to deliver on strategic goals and industry priorities.

BOARD OF DIRECTORS

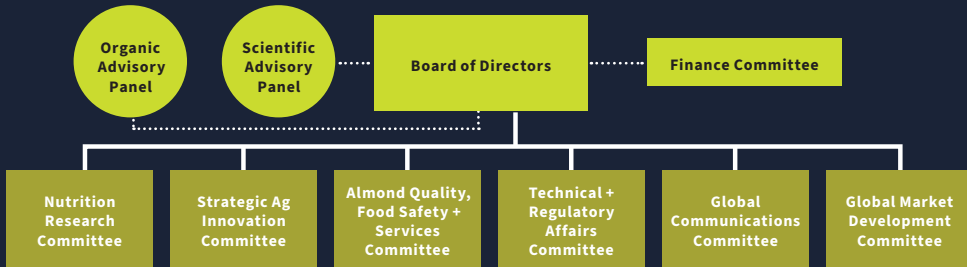


The Board of Directors, made up of five handler and five grower representatives, sets policy and strategic priorities and approves budgets for the Almond Board to ensure California almonds remain an essential crop in California and are in demand by consumers around the world. The Almond Board programs support the Board's strategic priorities and goals for the organization.

GETTING INVOLVED

Nearly 200 active almond industry members volunteer on Board-appointed committees and working groups to further the work of the Almond Board. All growers, handlers, huller/shellers and allied industry members along the supply chain or affiliated with the almond industry are encouraged to get involved. The Almond Board is always eager to have new volunteers and accepts applications all year long.

COMMITTEE STRUCTURE



YOU'RE INVITED

Any industry member is welcome to attend ABC committees, working groups and Board meetings without being a voting member. Check out the calendar of events to get involved.

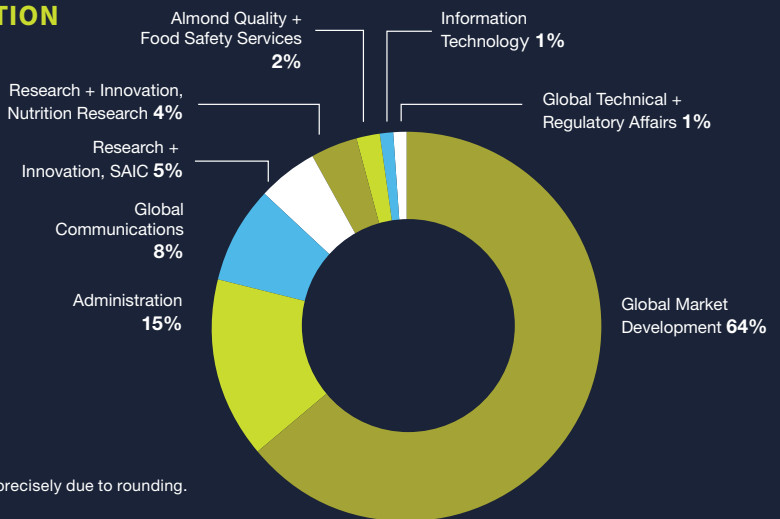


PROGRAMS + BUDGET

THE ALMOND BOARD OF CALIFORNIA'S PROGRAMS ARE FUNDED BY AN ASSESSMENT PLACED ON EVERY POUND OF ALMONDS GROWN IN CALIFORNIA. Working with Board-approved committees, subcommittees and working groups, the Board of Directors approves the budget allocation for each program area. These areas are defined in the Program Budget Allocation chart below.

PROGRAM BUDGET ALLOCATION

crop year 2023/24*



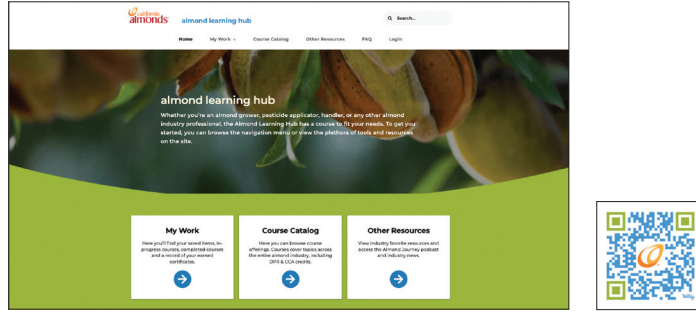
*Totals may not add precisely due to rounding.

GRANT FUNDING AUGMENTS ALMOND BOARD ASSESSMENT DOLLARS

The Almond Board successfully secured \$7 million in funding from the newly established Regional Agricultural Promotion Program (RAPP) provided by the U.S. Department of Agriculture. The funding will be instrumental in expanding market access and promoting California almonds in five international markets: India, Morocco, Türkiye, Indonesia and Brazil. In addition to the new RAPP funds, the Almond Board was awarded \$3.41 million in Market Access Program, \$221,000 in Foreign Market Development and \$250,000 in Emerging Markets Program funding.

INDUSTRY RESOURCES

The Almond Board of California's publications, online resources, special webinars and The Almond Conference are all focused on ensuring growers and handlers have the information they need to make key decisions to improve profitability and make continuous improvements to their operations.

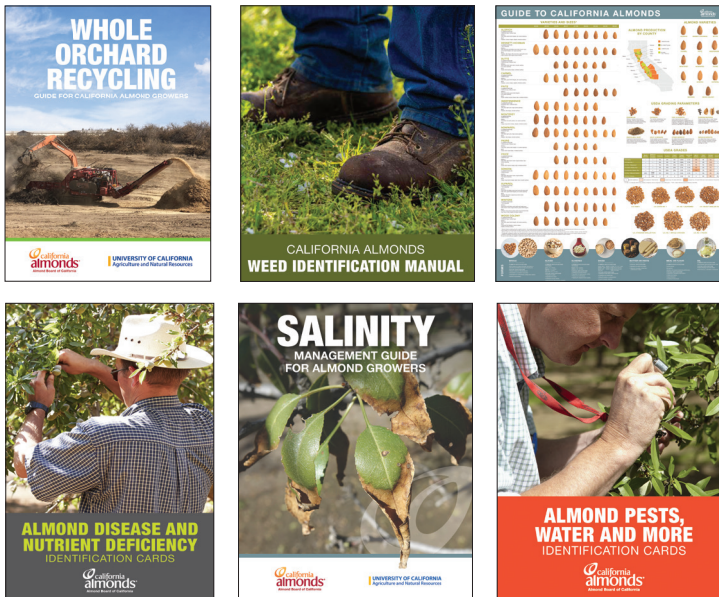


NEW ALMOND LEARNING HUB

In 2024, ABC launched the Almond Learning Hub for almond growers, pesticide applicators, handlers or any other almond industry professional. The hub serves as a new, free, online resource with courses and continuing education units.

AlmondLearningHub.com

COMPLIMENTARY RESOURCES



The Almond Board has a number of additional free resources available for almond growers and handlers.

Request your materials today.



INCENTIVES

Technical assistance and grants can aid on-farm efficiency and financial resiliency for almond growers, particularly during difficult economic times. In past years, almond growers have used a variety of cost-share programs to assist with the adoption of technologies and practices in irrigation, nutrient management, dust reduction, cover crop and pest management projects.

Financial support for almond growers, processors and farm-related businesses is available from a variety of federal, state and local agencies and from non-governmental organizations. Incentive programs are offered for a range of focus areas.

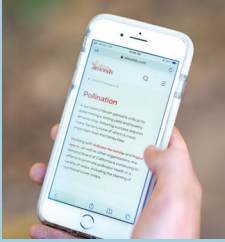
Start your journey today by visiting Almonds.com/Grants



UC DAVIS COST STUDY

Never has agriculture faced so many challenges—increasing crop input costs, inflation, almond prices and complex regulatory environments. This new tool is a way for growers to forecast on-farm economics with new numbers and reports coming out of the UC Davis Cost Study.

AT THE ALMOND BOARD OF CALIFORNIA, WE ARE COMMITTED TO SHAPING A FUTURE WHERE THE CALIFORNIA ALMOND INDUSTRY CONTINUES TO THRIVE.



By embracing innovation in product usage, fostering new partnerships and addressing challenges head-on, the Almond Board is positioning California almonds for sustained growth and enduring value.

The following pages of the *Almanac* will showcase just a few examples of what the Almond Board is doing to drive new market opportunities, educate key stakeholders and secure the resources necessary to support our industry's future. From reaching new consumers to debunking misconceptions about water usage, the Almond Board is taking a proactive approach to ensure that almonds remain a beloved choice for generations to come.



EDUCATING STAKEHOLDERS AND AUTHORITIES ON CALIFORNIA ALMOND ISSUES.

A foundational element to building global demand for California almonds is to diligently educate stakeholders and government authorities on issues important to California almonds. Recent meetings in 2024 with the Foreign Agricultural Service at the U.S. Agricultural Export Development Council (USAEDC) conference in Washington, D.C., provided a key platform to engage with the Foreign Agricultural Service on trade, market access and regulatory issues. Meetings like these with trade and foreign authorities worldwide help to ensure that key decision makers have almonds top of mind.



Almond Board Delegation members met with Rep. Josh Harder (D-CA-09) in Washington, D.C., to update him on the state of the industry.



The Almond Board joined other ag commodity groups with the Foreign Agricultural Service staff at the USAEDC conference in Washington, D.C., to engage in trade, market access and regulatory issues.

MARKET ACCESS WINS OPEN NEW OPPORTUNITIES.

The Almond Board's Market Access team has been hard at work. In April 2024, the UK suspended tariffs on all raw kernel and in-shell almonds from all origins, including the U.S., opening new opportunities for almond exporters. Simultaneously, China's Ministry of Agriculture and Rural Affairs recognized almond hulls and shells as official feed ingredients by incorporating definitions based on the Association of American Feed Control Officials and California Department of Food and Agriculture standards into its feed ingredients catalog. This development marks a significant new market for almond products. In addition, the almond industry is engaging with EU and Japanese authorities on aflatoxin controls as well as exploring new market opportunities in Morocco and Türkiye.

PLANT-BASED DAIRY ALTERNATIVES + ALMOND BUTTER RECOGNIZED IN WOMEN, INFANTS AND CHILDREN (WIC) PROGRAM

On April 9, the U.S. Department of Agriculture revised regulations to align food packages for the Special Supplemental Nutrition Program for Women, Infants and Children (WIC) with the current Dietary Guidelines for Americans. The update recognizes almond butter as part of the program. Moving forward, engaging at the WIC state agency level can help ensure almond butter is included and redeemed within WIC programs. This initiative was led by the Almond Alliance with the Almond Board providing scientific comments and expertise.

CALIFORNIA ALMONDS ARE ONE OF THE MOST RESEARCHED FOODS

HEALTH CONTINUES TO BE THE TOP REASON PEOPLE REACH FOR ALMONDS, AND THE ALMOND BOARD IS DRIVING THAT MESSAGE FORWARD WITH NEW, GROUNDBREAKING RESEARCH. Over the past year, ABC’s Nutrition Research committee invested in 10 novel, high-impact studies and currently has 38 projects underway in diverse health areas, all focused on uncovering even more health benefits of almonds.

THE HEART OF ALL ABC MARKETING

It is not just about research—communicating the health benefits of almonds is at the heart of all of the Almond Board’s marketing programs. Pages 10–15 of the *Almanac* provide a variety of examples of how ABC is leveraging the research to provide even more reasons for consumers to choose almonds.



REACHING NEW CONSUMERS IN THE U.S. BY PROMOTING ALMOND EXERCISE RECOVERY BENEFITS.

U.S. consumers need compelling, new reasons to consider almonds and add them to their snacking routine. **Following the groundbreaking nutrition research study on almonds and exercise recovery benefits in 2023, the Almond Board partnered with Deion “Coach Prime” Sanders to boldly promote the new exercise recovery research and appeal to new almond consumers.** In its first year, the *Own Your Prime* campaign drove 10X more media attention than any previous ABC spokesperson. Further, the campaign sparked a 42% increase in new almond buyers through a Kroger promotion, and in year two, the program is expanding with dietitians, fitness professionals and influencers promoting the almond message on TikTok and Instagram.



The Almond Board is also promoting almond recovery benefits to Gen Z through a first-of-its-kind partnership with **EA SPORTS College Football 25**, the highly anticipated video game. The in-game integration features California almonds as one of only two branded in-game NIL deals, giving virtual athletes real advantages like boosted strength and reduced fatigue. This integration is being featured at the **EA SPORTS College Football Championship Tour** across 10 different college campuses highlighting almonds’ exercise recovery benefits while fueling both athletes and gamers alike.





BROADENING THE APPEAL OF ALMONDS IN CALIFORNIA'S LARGEST EXPORT MARKET.

Almonds have a strongly engrained heritage in India, known as a morning staple for boosting mental sharpness. However, Gen Z is looking for more relevant reasons to eat almonds on a regular basis. **The Almond Board launched a series of playful digital ads targeted to Gen Z, highlighting the numerous health benefits of almonds, helping to expand consumption among the youngest consumers in India.**

To even further broaden the appeal of almonds in India, ABC is tapping into consumers' deep passion for cricket. **ABC is partnering with an Indian Premier League cricket player, Rishabh Pant, to promote almonds.** Pant will be a powerful new face to promote the numerous benefits of almonds to his 11.4 million Instagram followers.



Rishabh Pant led India to win the 2024 T20 World Cup and is now the captain of the Delhi Capitals.



For muscle recovery, I have almonds everyday!


not amongst people who exercise occasionally (less than three times per week). Norman, D. C., Oniz, A. M., Kay, C. D., Kozio, S. M., Sakaguchi, C. A., Liguori, A., Woldemariam, M. M., & Zhang, D. (2019). The acute plasma alanine aminotransferase (ALT) response to eccentric exercise. Front. Nutr. doi: 10.26434/chemrxiv-2019-07-01177

NUTRITION RESEARCH AROUND THE WORLD

Last year, marketing efforts delivered 1,178 media stories in well-respected outlets around the globe, amplifying the powerful story of California almonds and their role in health and wellness.

Almonds are good for healthy weight loss, new study finds

A new study shows that almonds contain several nutrients and can be a good addition to a healthy weight-loss diet



Post-Exercise Muscle Recovery? Here's What Study Says

These results expand on prior research which looked at how almonds affect muscle recovery after exercise.

Health News • 2 min read
Reported by: Republic Lifestyle Desk

Follow:



Women's Health



Almonds are rich in protein, fiber, and healthy fats. They are also a good source of antioxidants and vitamins. Almonds can help with muscle recovery after exercise.

Grassroots Health

el.mexicanog

NACIONAL - SALUD

Resultados de investigaciones recientes respaldan el papel del consumo de las almendras en la salud del corazón



Por: EL MEXICANO | 27 de Septiembre del 2023

CDMX a 27 de septiembre, 2023 - El viernes 29 de septiembre se celebra el Día Mundial del Corazón, un evento mundial para crear conciencia sobre los riesgos de las enfermedades cardiovasculares y resaltar la prevención de enfermedades. Según la Organización Mundial de la Salud (OMS), las enfermedades cardiovasculares son la primera causa de muerte en México y a nivel mundial. El Día Mundial del Corazón, creado por la Fundación Mundial del Corazón, tiene como objetivo reducir el número de muertes cardiovasculares en un

INSIDER

HEALTH

Deion Sanders said he used to eat soul food before practice but he changed his diet and has a new routine now



Health benefits of almonds: Snacking on almonds help in faster muscle recovery after exercises

Health benefits of almonds: Snacking on almonds can be recommended to occasional exercisers as a go-to food to help fitness recovery after strenuous exercise, suggests a new study. Naturally nutritious with protein, good fats and the antioxidant vitamin E, they are the ideal food for fitness.

PTT | FEBRUARY 26, 2024 | 11:34:17



Almonds aid in weight loss, improve cardiometabolic health, shows study

Researchers showed that when energy restricted diets were supplemented with Californian almonds or carbohydrate rich snacks, both diets successfully lowered body weight by roughly 7kg



Nuts are surprisingly great for your health. But which are the best?

Experts say that almonds are the best for supporting cardiovascular health—improving a lower risk of disease, better cognitive function, and even a longer life.

By Peter Attia

Almonds are at the top of the list for their cardiovascular benefits. When it comes to heart health, almonds are a top choice. They are low in saturated fat and high in monounsaturated fats. They are also rich in antioxidants, which can help reduce inflammation and improve blood flow.

TIME

HEALTH • EXERCISE & FITNESS

What to Eat Before and After Your Workout

8 MINUTE READ



PAID ADS ON SOCIAL MEDIA DRIVE AWARENESS GLOBALLY.

GERMANY




MEXICO




ITALY




JAPAN



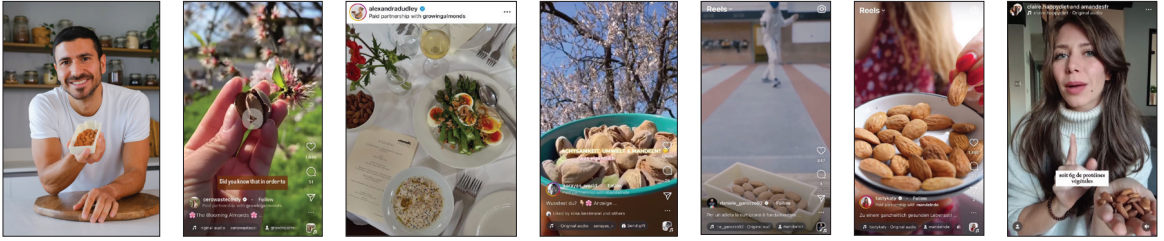

SOUTH KOREA




FRANCE




THE POWER OF INFLUENCERS



The Almond Board partners with relevant and thought-provoking influencers to boost awareness of California almonds globally. These influencers have established trust and credibility with their followers and are able to create authentic and engaging almond content that resonates, driving a high engagement rate.

KEEPING ALMONDS TOP OF MIND WITH HEALTH PROFESSIONALS

It is important to ensure that health professionals have almond health information at their fingertips to ensure almonds remain top of mind when they share health information with clients. We do this by attending professional events and sharing resources. Here are just a few examples:



Left-to-right, top-to-bottom: ABC attended the Academy of Nutrition and Dietetics annual conference and met with over 3,000 registered dietitians to share the latest research; ABC hosted four events at the Indian Dietetic Association chapter meetings; ABC's CEO, Clarice Turner, visited Rome's School of Sport. The online seminar on exercise recovery was watched by 270 health professionals.

GLOBAL CARDIOMETABOLIC HEALTH ROUNDTABLE

The Almond Board brought top global nutrition experts together to critically analyze over 30 years of research on heart health, blood sugar regulation, weight management and gut health to achieve independent expert consensus on almond health effects. The experts agreed on almond benefits across each area reviewed and are drafting a peer-reviewed publication to summarize their conclusions and recommendations for future research.



In July 2024, members of the Cardiometabolic Health Roundtable met in Modesto, CA.

POWERING ALMOND PRODUCT INNOVATION



AI DRIVES INNOVATION IN NEW PRODUCTS

New product innovation is critical to the growth of the almond industry, and the Almond Board is tapping into AI and big data to drive even more innovation. As the #1 nut used in new product introductions, ABC is working to stimulate the future of almond innovation in breakthrough ways. In China, ABC partnered with Tmall, the biggest online retailer in the world, to leverage big data to identify the most promising trends for almonds.



NEXT GENERATION OF CHEF EDUCATION

To secure the future of almonds with new-product developers and chefs, the Almond Board is partnering with key education facilities to provide a multi-step curriculum on almonds from high school to college programs to the Culinary Institute of America. These efforts aim to unlock the potential of all 14 forms of almonds for generations to come.



MEXICO: BAKING UP SUCCESS

Bakery is a staple of the Mexican diet and is the country's largest food category. Although Mexicans have a strong history with baked goods, almonds are a relatively new ingredient for Mexican baked goods. To inspire more almond usage in bakery, the Almond Board hosted an immersive harvest tour for 16 of Mexico's most influential bakers. By deepening their knowledge and highlighting the versatility of almonds in various forms, the Almond Board is sparking innovation and expanding the role of almonds in everyday baking.



CONSUMERS AND FOOD MANUFACTURERS ARE INCREASINGLY INTERESTED IN HOW FOOD IS GROWN

It is important to set the record straight on almond misconceptions. To do this, Blue Diamond partnered with True Food TV to investigate almond farming, water usage and bee health. The water segment debunked the myths about almonds and water in a fact-based way. The Almond Board leveraged all of the videos to deliver the information to over 38 million people (about twice the population of New York) through YouTube, Facebook and Instagram. This powerful outreach is driving awareness and ensuring that the truth about almonds reaches a wide audience.



WATER



BEEES

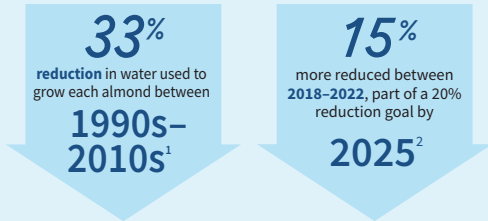




Everything you get with a handful of *Almonds*

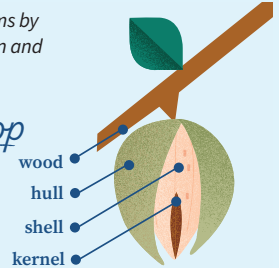
Getting the most out of every drop

California almond farmers conserve water on their farms by adopting water-efficient technology like microirrigation and putting everything the orchard grows to good use.



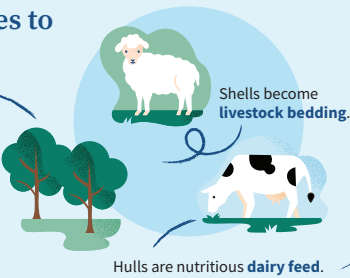
Four crops for every drop

Water used to grow almonds actually grows four products: the kernel you eat, which grows in a shell, protected by a hull, on a tree productive for approximately 25 years.



Nothing goes to waste

Trees store carbon and are transformed into electricity or ground up into the soil at the end of their lives.



Reducing the water needed to grow other feed crops

Hulls can replace alfalfa hay pound for pound in up to 20% of dairy feed formulations, reducing the acreage needed to grow it by 386,000 acres and **saving 440 billion gallons of water**.³



Building biodiversity

Almond farmers are increasingly growing cover crops—important for soil quality, pest management and insect biodiversity.

Growing more than *almonds*



86%

of all U.S. **bee-friendly certified farms** are almond farms.¹⁴



42%

of California almond orchards (685K acres) **maintain cover crops** between tree rows.¹¹

Helping honey bees



Bees get their first food of the year in almond orchards as they collect nutritious pollen¹⁵ and nectar.¹⁶ Beekeepers report their **hives consistently leave stronger** than when they arrived.¹⁷

Environmentally friendly pest management

California almond farmers are on track for a **25% increase** in environmentally friendly pest management practices by 2025.²



No food waste here

America throws away nearly 60 million tons of food every year—that's almost **40% of the entire U.S. food supply**.¹⁹ Less than 1% of almonds are thrown out thanks to their **two-year shelf life**.²⁰



Almonds are a shelf-stable food which means they are **shipped around the world by boat**. Cargo ships produce **50x less CO₂ per kilometer** than travel by plane.²¹

Why California?

Family farms

There are 7,600 almond farmers in California: **90% are family farms**, and 70% of orchards are 100 acres or less.²²



Ideal climate

California is **1 of only 5 Mediterranean climates** on Earth, essential to growing almonds.

High standards

California's growing environment is one of the **most regulated globally**, with strict laws protecting the environment, worker and food safety.

Climate smart farming

Almond trees capture and store carbon dioxide, a greenhouse gas, in their wood and roots. This storage accumulates as the trees grow, reducing emissions and environmental impact.

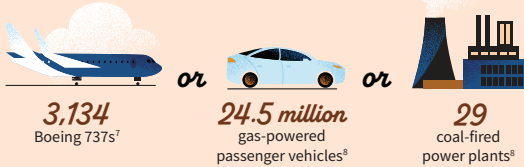
Almond trees store a lot of carbon

Compared to other fruit and nut trees grown in California, almonds store one of the **highest amounts of carbon per acre**—18 metric tons annually. When you look at carbon stored in all of California's almond trees (1.63 million acres), this nets out to 30 million metric tons.⁶



30 million metric tons of carbon⁶

Equivalent to the annual emissions of:



Whole orchard recycling

Farms that recycle their orchards capture 2.4 tons of carbon per acre,⁹ each one **equal to living car-free for a year**.¹⁰

25-year lifespan

Almond orchards are a **no-till environment** for their 25-year lifespan.



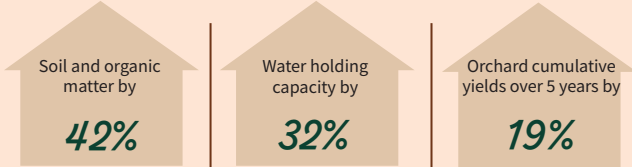
Back to the soil

At the end of their productive lives, whole trees are ground up and incorporated back into the soil, extending their sequestration.

On-farm adoption

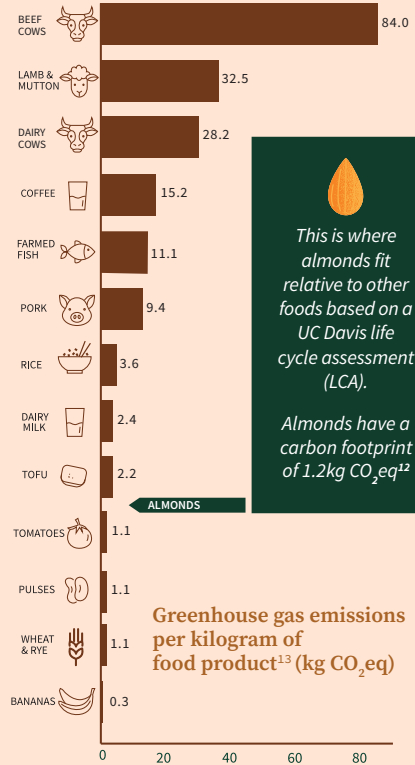
Since this practice was **introduced in 2017**, nearly half of almond farmers replanting orchards have used this approach.¹¹

Whole orchard recycling helps farmers too, increasing:⁹



A low carbon footprint

Almonds have a lower carbon footprint than many other foods.

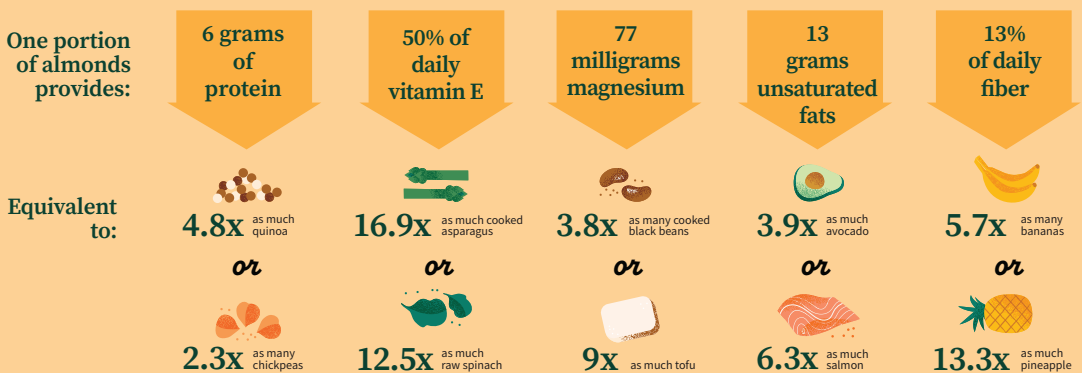


This is where almonds fit relative to other foods based on a UC Davis life cycle assessment (LCA).
Almonds have a carbon footprint of 1.2kg CO₂e/kg¹²

Greenhouse gas emissions per kilogram of food product¹³ (kg CO₂e/kg)

Health and nutrition

Ounce for ounce, almonds are the tree nut highest in protein, fiber, calcium, vitamin E, riboflavin and niacin¹⁸ and may be a more efficient way to consume certain nutrients.

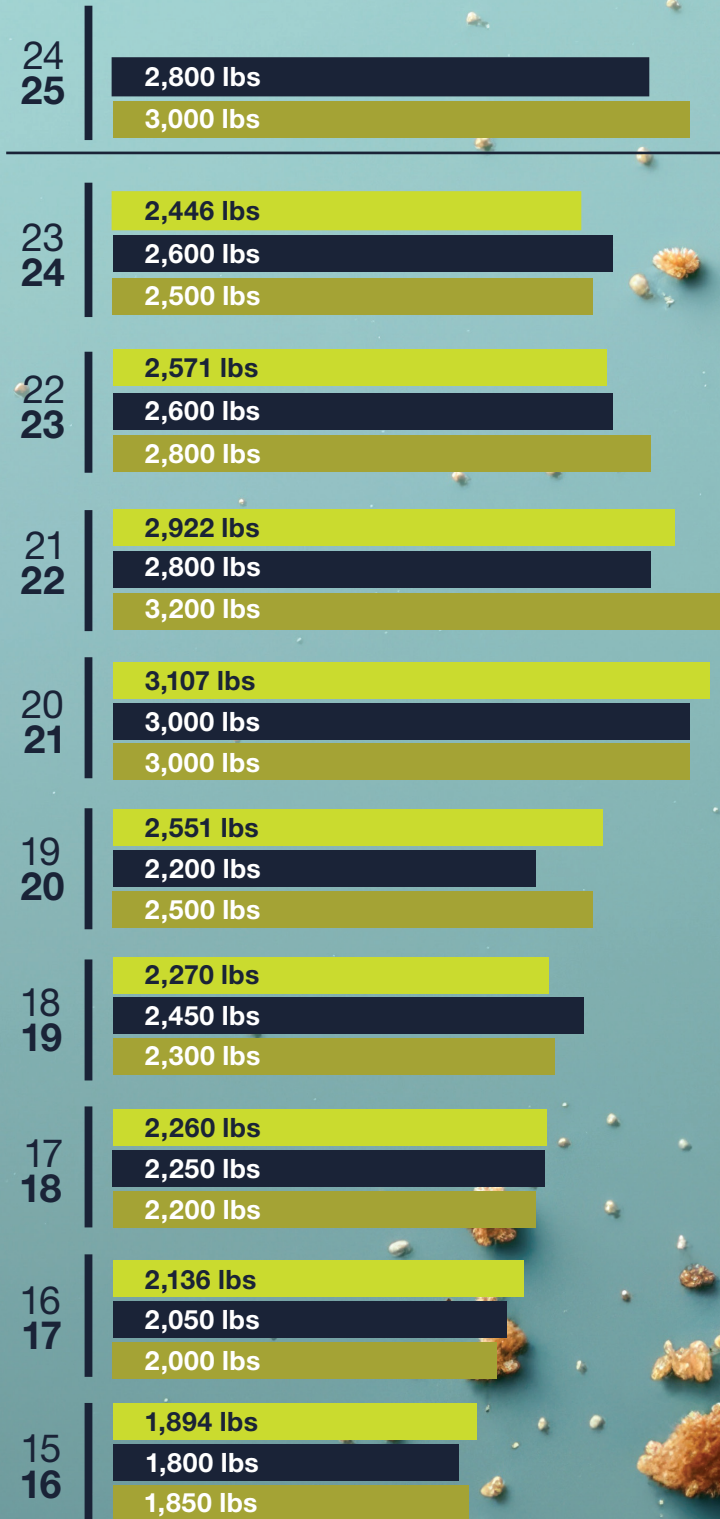
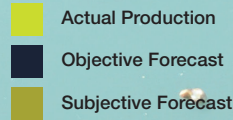


Use this QR code to access citation information and a digital version of this infographic. A printable version, slides and posters of this infographic can be accessed at Almonds.com/StewardshipResources.

FORECASTS VS. ACTUAL PRODUCTION

CALIFORNIA ALMOND FORECASTS VS. ACTUAL PRODUCTION

crop years 2015/16–2024/25 | million pounds



Sources: Almond Board of California, U.S. Department of Agriculture, National Agricultural Statistics Service, Pacific Regional Office (USDA, NASS/PRO).

CALIFORNIA ALMOND CROP ESTIMATES VS. ACTUAL RECEIPTS

crop years 2004/05–2024/25 | million pounds

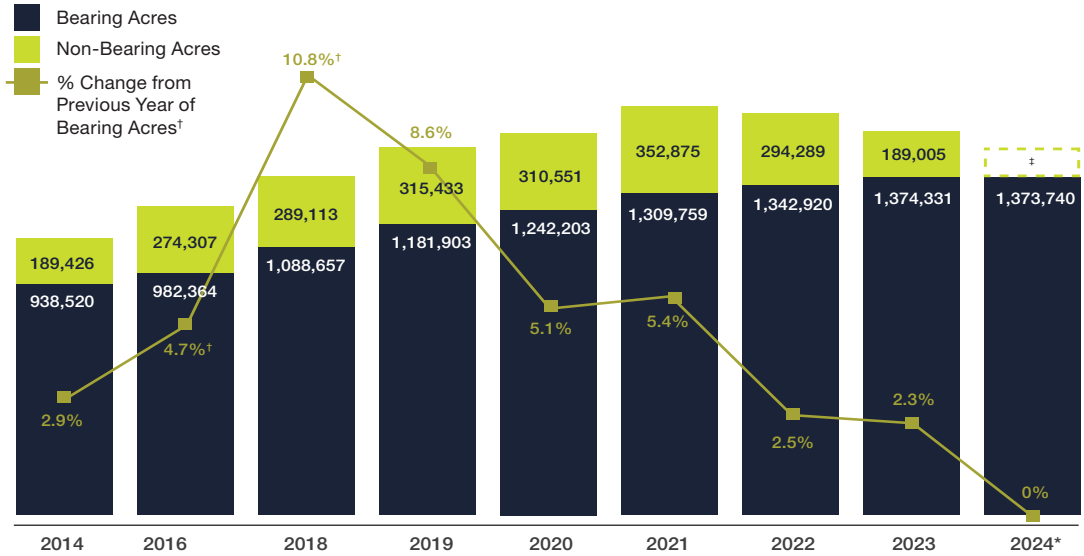
Crop Year	Objective Forecast	Handler Receipts	Loss and Exempt	Redetermined Marketable Weight	Lbs. Rejects in Receipts
2004/05	1,080.0	998.0	25.2	972.8	14.5
2005/06	880.0	911.7	23.0	888.7	16.0
2006/07	1,050.0	1,116.7	28.9	1,087.8	24.0
2007/08	1,330.0	1,383.0	24.7	1,358.3	17.2
2008/09	1,500.0	1,614.6	42.7	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	2,600.0	2,571.1	43.0	2,528.1	54.6
2023/24	2,600.0	2,446.0	51.7	2,394.3	103.4
2024/25 [†]	2,800.0	*	56.0	2,744.0	*

Sources: Almond Board of California. Objective forecast provided by USDA, National Agricultural Statistics Service, California Field Office.
^{*}Not available at time of publication. [†]Estimated.

CROP

CALIFORNIA ALMOND ACREAGE

2014–2024



Source: Land IQ, 2024 Standing Acreage Initial Estimate—April 2024. *Estimate. †Percent change in 2016 & 2018 reflects two prior years of bearing acres. ‡Not available at time of publication

CALIFORNIA ALMOND ACREAGE + FARM VALUE

crop years 2015/16–2024/25

CROP YEAR	ACRES				YIELD		VALUE		
	BEARING	NON-BEARING	TOTAL	AVERAGE TREES PER ACRE	BEARING ACRE YIELD (LBS.)	PRODUCTION* (MILLION LBS.)	FARM PRICE	FARM VALUE (\$1,000)	VALUE PER BEARING ACRE
2015/16	-	-	-	114.0	2,000	1,894	\$3.13	\$5,868,750	\$6,178
2016/17	982,364	274,307	1,256,671	116.0	2,210	2,136	\$2.39	\$5,052,460	\$5,143
2017/18	-	-	-	117.0	2,200	2,260	\$2.53	\$5,603,950	\$5,441
2018/19	1,088,657	289,133	1,377,790	119.0	2,090	2,270	\$2.50	\$5,602,500	\$5,146
2019/20	1,181,903	315,433	1,497,336	122.0	2,170	2,551	\$2.45	\$6,169,100	\$5,220
2020/21	1,242,203	310,551	1,552,754	122.0	2,490	3,107	\$1.71	\$5,251,410	\$4,227
2021/22	1,309,759	352,875	1,662,634	122.0	2,240	2,922	\$1.86	\$5,351,220	\$4,086
2022/23	1,342,920	294,289	1,637,209	122.5	1,910	2,571	\$1.40	\$3,536,400	\$2,633
2023/24	1,374,331	189,005	1,563,336	124.7	1,790	2,446	\$1.64	\$3,880,240	\$2,823
2024/25†	1,373,740	‡	‡	125.4	2,030	2,800	July 2025	July 2025	July 2025

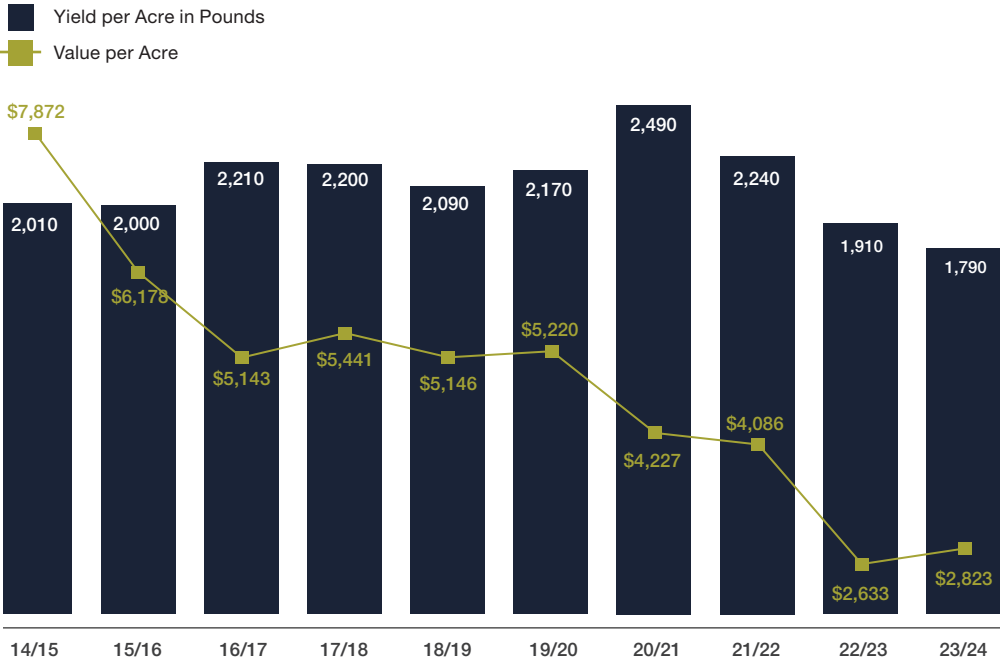
Source: Land IQ, USDA, National Agricultural Statistics Service, Pacific Region Field Office (NASS/PRO). Note: Land IQ data unavailable for 2015/16 & 2017/18 crop years. USDA/NASS acreage data used for Value Per Bearing Acre calculation in 2015/16 & 2017/18. The Almond Board does not track prices. *Production numbers provided by Almond Board of California. †Estimated as of September 1, 2024. ‡Not available at time of publication.



FACTS AND FIGURES

CROP VALUE + YIELD PER BEARING ACRE

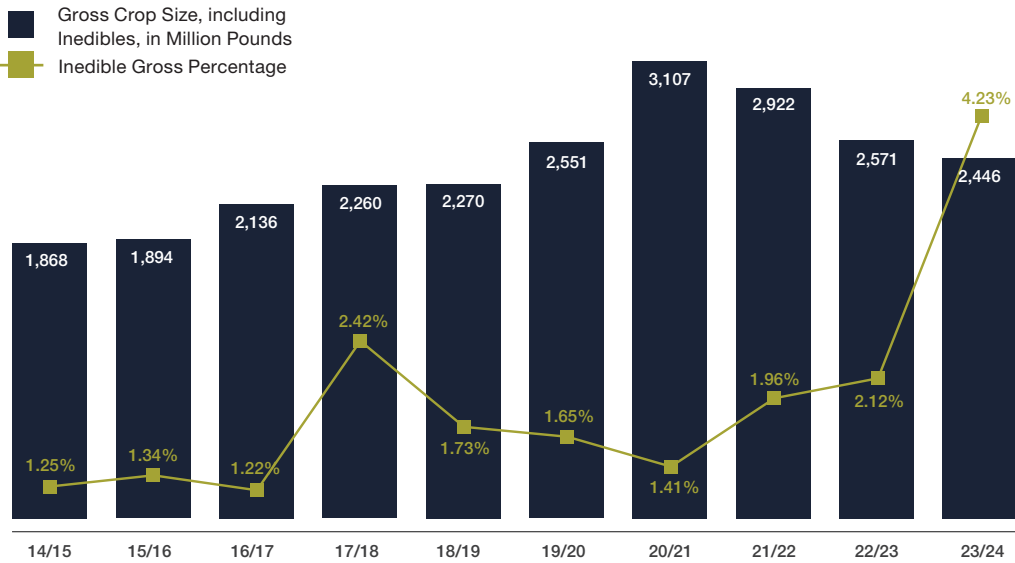
crop years 2014/15–2023/24



Source: USDA, NASS/PRO 2024 California Almond Objective Forecast. NOTE: Land IQ Acreage Data is unavailable for 2015/16 & 2017/18 crop years so USDA/NASS acreage used in those years for Value Per Bearing Acre Calculation

CALIFORNIA ALMOND CROP-SIZE HISTORY + INEDIBLE PERCENTAGE

crop years 2014/15–2023/24



Source: Almond Board of California.

170,000+ acres of almond orchards are recognized bee-friendly, representing 86% of all bee-friendly certified U.S. farms.

Source: Pollinator Partnership, January 2023.

CROP

CALIFORNIA ALMOND RECEIPTS BY COUNTY + VARIETY

crop year 2023/24 | pounds

Counties	% Crop	Nonpareil	Monterey	Independence	Butte/Padre	Carmel	Fritz	All Others	All Varieties
Northern									
Butte	1.9%	21,035,372	3,511,752	2,231,139	4,334,983	2,821,440	411,492	12,012,749	46,358,927
Colusa	5.0%	53,490,951	18,021,438	4,076,139	10,890,296	9,103,669	5,971,684	21,780,370	123,334,547
Glenn	3.3%	41,121,845	8,072,877	2,752,626	6,906,291	6,110,726	809,331	15,303,981	81,077,677
Solano	1.2%	8,476,981	3,239,090	9,547,567	1,894,344	1,142,529	8,272	5,007,103	29,315,886
Sutter	0.9%	7,402,508	2,612,000	5,747,357	1,625,202	607,085	35,930	3,132,899	21,162,981
Tehama	1.1%	12,606,397	2,916,544	1,380,880	2,219,160	2,682,257	3,159	4,848,832	26,657,229
Yolo	2.5%	23,671,302	10,066,788	8,350,333	2,953,131	2,815,843	1,056,769	13,205,111	62,119,277
Yuba	0.2%	1,468,412	673,363	1,441,373	8,274	58,377	30,663	736,263	4,416,725
Others	0.4%	1,889,449	784,132	4,277,975	800,260	90,774	150,700	989,480	8,982,770
Totals	16.5%	171,163,217	49,897,984	39,805,389	31,631,941	25,432,700	8,478,000	77,016,788	403,426,019
Central									
Merced	9.6%	80,755,262	40,685,179	37,486,347	20,120,456	7,824,265	8,271,850	38,741,697	233,885,056
San Joaquin	6.8%	50,493,983	13,100,343	47,458,580	9,588,596	10,757,020	4,283,948	29,442,807	165,125,277
Stanislaus	13.5%	101,870,557	32,496,804	81,899,578	25,958,215	21,094,008	9,643,844	57,983,118	330,946,124
Others	0.2%	2,581,198	1,398,620	953,443	130,593	169,742	0	718,595	5,952,191
Totals	30.1%	235,701,000	87,680,946	167,797,948	55,797,860	39,845,035	22,199,642	126,886,217	735,908,648
Southern									
Fresno	18.7%	168,351,464	106,876,697	76,636,177	30,652,910	2,365,554	8,193,991	65,157,320	458,234,113
Kern	16.5%	186,632,727	118,789,465	21,293,552	23,085,422	3,795,190	20,415,037	29,106,514	403,117,907
Kings	2.7%	24,001,834	16,733,120	14,116,898	3,171,900	0	666,496	7,466,713	66,156,961
Madera	9.9%	101,587,186	60,678,859	16,146,561	16,055,715	4,734,878	8,388,623	33,603,074	241,194,896
Tulare	5.6%	52,995,679	33,114,370	27,528,508	6,243,904	368,558	3,132,591	14,124,361	137,507,971
Others	0.0%	105,955	461,362	7,883	0	12,363	0	74,274	661,837
Totals	53.4%	533,674,845	336,653,873	155,729,579	79,209,851	11,276,543	40,796,738	149,532,256	1,306,873,685
Grand Total	100.0%	940,539,062	474,232,803	363,332,916	166,639,652	76,554,278	71,474,380	353,435,261	2,446,208,352

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.

CALIFORNIA ALMOND PRODUCTION BY COUNTY

crop years 2014/15–2023/24 | million pounds

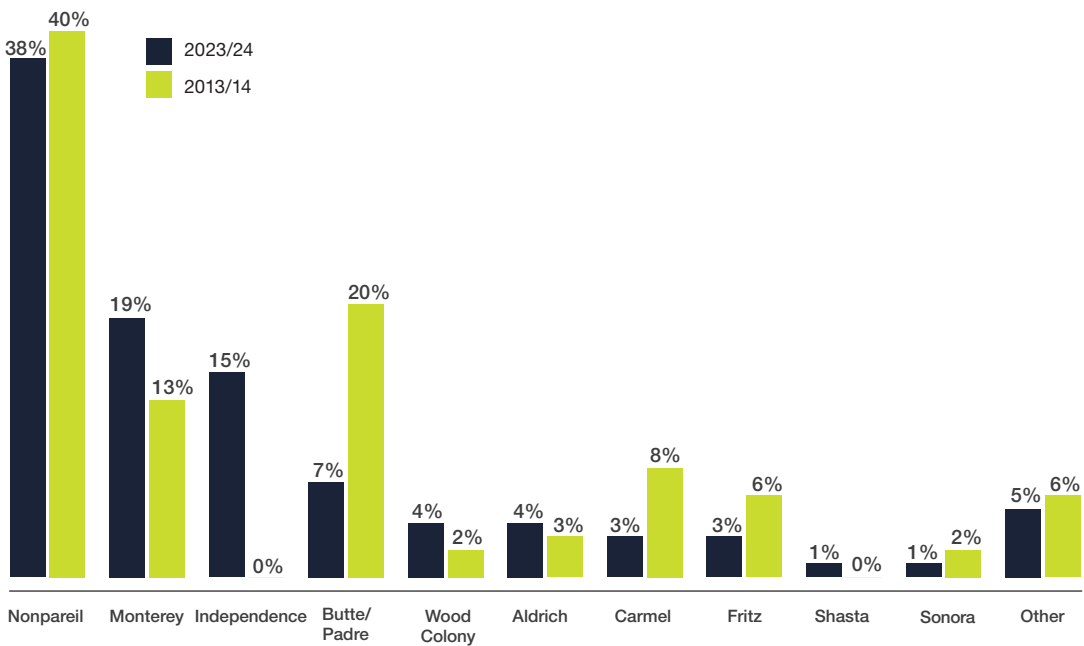
	Colusa	Glenn	Yolo	Butte	Solano	Tehama	Sutter	Yuba	Stanislaus	Merced	San Joaquin	Fresno	Kern	Madera	Tulare	Kings	All Others	Total
	Northern								Central			Southern						
2014/15	90.2	58.7	18.1	55.2	5.1	13.3	7.7	-	274.4	198.2	94.3	370.5	390.3	202.9	57.0	31.9	1.9	1,869.7
2015/16	109.7	75.4	27.3	57.4	6.0	16.0	7.4	-	260.7	188.7	97.2	376.5	366.1	215.2	53.9	32.4	2.3	1,892.1
2016/17	104.0	68.9	28.0	54.3	6.2	1.4	8.3	-	291.0	222.3	104.9	433.2	433.2	242.6	73.9	40.3	2.1	2,130.6
2017/18	112.9	72.6	39.7	52.1	8.4	18.6	8.7	-	303.2	223.7	108.7	494.4	429.5	264.0	80.9	43.6	2.4	2,263.7
2018/19	96.8	69.4	39.4	57.1	11.3	16.2	9.0	-	341.9	235.1	135.5	462.4	398.2	261.4	81.1	48.5	4.7	2,268.1
2019/20	113.6	63.5	55.8	43.2	14.5	18.4	10.4	1.3	302.3	223.4	124.4	598.3	491.7	298.9	116.4	68.8	6.8	2,551.5
2020/21	156.2	96.0	79.5	70.6	29.7	29.9	19.3	2.7	437.2	305.9	177.9	655.5	495.7	351.3	120.1	78.9	8.5	3,114.9
2021/22	117.7	77.0	65.2	51.4	31.3	28.1	18.3	2.9	414.5	294.1	181.0	610.3	473.6	333.8	134.0	74.7	10.4	2,918.5
2022/23	65.6	32.8	36.1	36.9	16.2	10.3	7.5	2.1	383.4	287.5	191.2	518.3	457.6	304.1	144.7	67.9	9.1	2,571.3
2023/24	123.3	81.1	62.1	46.4	29.3	26.7	21.2	4.4	330.9	233.9	165.1	458.2	403.1	241.2	137.5	66.2	15.6	2,446.2

Totals may not add precisely due to rounding. Source: USDA Incoming Receipts.



TOP 10 ALMOND-PRODUCING VARIETIES

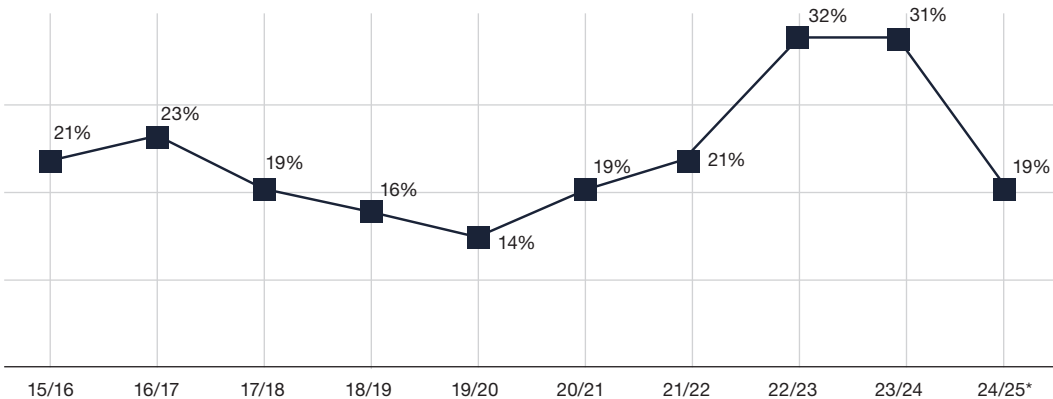
crop years 2013/14 vs. 2023/24



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 2015/16–2024/25

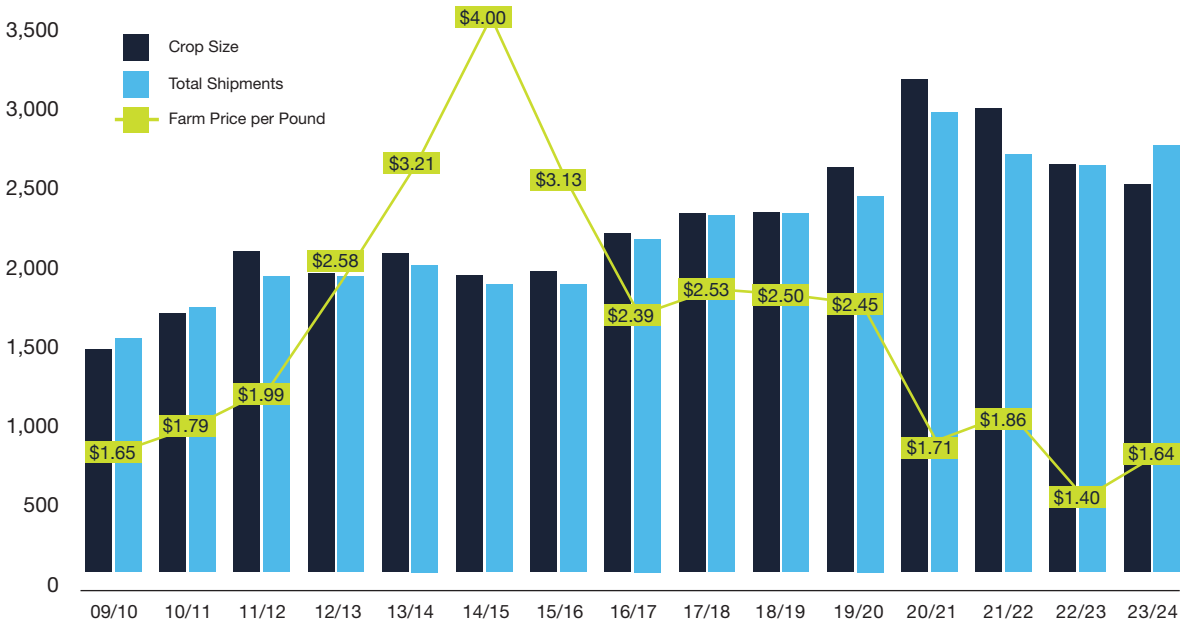


Source: Almond Board of California. *Forecasted.

CROP + SHIPMENTS

HISTORICAL CROP SIZE + SHIPMENTS VS. FARM PRICE

crop years 2009/10–2023/24 | million pounds



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

POSITION REPORT OF CALIFORNIA ALMONDS

crop years 2014/15–2024/25 | million pounds

Crop Year	Redetermined Marketable Weight	Carry-In	Reserve	Total Salable Supply	Domestic Shipments	Export Shipments	Total Shipments	Salable Carry-Over
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	3,470.8	764.6	1,869.3	2,633.9	836.8
2022-23	2,528.1	836.8	N/A	3,364.9	716.4	1,848.3	2,564.6	800.3
2023-24	2,394.3	800.3	N/A	3,194.6	728.1	1,963.9	2,692.0	502.7
2024-25*	2,744.0	502.7	N/A	3,246.7	728.1	1,968.6	2,696.7	550.0

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



Almonds’ long shelf life means they travel to their destination by cargo ship, producing 50 times less carbon dioxide emissions per kilometer than travel by airplane.

Source: Joseph Poore, et al. Reducing food’s environmental impacts through producers and consumers. *Science*. June 2018.

WORLD DESTINATIONS

crop years 2019/20–2023/24 | million pounds

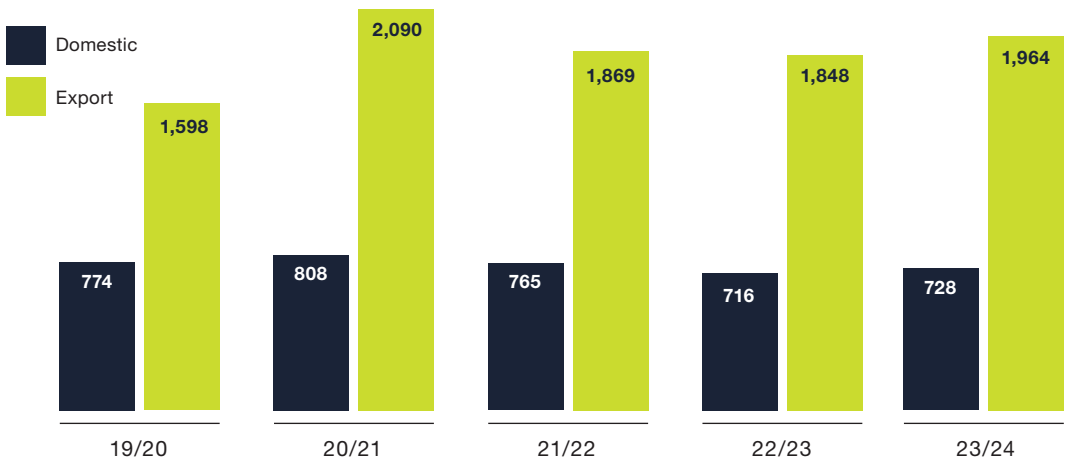
Destination		2019/20	2020/21	2021/22	2022/23	2023/24	
Americas							
North America	Canada	59.59	62.93	62.89	58.13	59.90	
	Mexico	24.23	30.21	29.19	30.07	31.14	
	Total North America	83.85	93.25	92.15	88.26	91.14	
Latin America/ Caribbean	Argentina	1.40	3.29	2.33	1.82	1.35	
	Brazil	4.97	7.92	4.71	6.61	6.02	
	Chile	7.30	11.89	10.67	7.02	7.21	
	Colombia	5.17	7.04	7.38	5.82	7.38	
	Costa Rica	1.29	1.31	1.44	1.03	0.95	
	Dominican Republic	0.27	0.55	0.54	0.76	0.60	
	Ecuador	0.13	0.20	0.21	0.73	0.59	
	Honduras	0.11	0.24	0.36	0.66	0.82	
	Peru	3.20	4.95	2.51	4.94	4.46	
	Trinidad	0.60	0.82	0.93	0.72	0.63	
Total Latin America/Caribbean	24.97	39.22	31.78	30.93	30.99		
Total Americas	108.83	132.47	123.93	119.20	122.13		
Asia-Pacific							
Northeast Asia	China/Hong Kong	98.55	162.35	127.30	143.38	106.00	
	Japan	84.95	92.02	95.06	87.28	86.46	
	South Korea	56.10	76.68	65.41	57.13	59.51	
	Taiwan	9.95	13.75	10.79	12.79	10.27	
	Total Northeast Asia	249.55	344.80	298.57	300.59	262.30	
Southeast Asia	Indonesia	4.26	5.38	6.72	5.90	8.36	
	Malaysia	8.68	10.42	8.30	7.14	6.96	
	Philippines	0.55	1.10	1.34	1.42	2.00	
	Singapore	4.14	5.34	4.76	5.28	4.62	
	Thailand	8.25	9.46	10.98	12.31	15.88	
Total Southeast Asia	40.36	65.77	59.55	59.19	80.23		
South/Central Asia	Afghanistan	2.83	2.48	4.51	6.36	0.56	
	Bangladesh	0.48	2.92	1.47	1.23	0.88	
	India	255.77	362.07	352.67	331.08	400.19	
	Kazakhstan	8.92	10.95	5.40	8.20	2.62	
	Nepal	0.96	1.80	1.09	1.16	0.60	
	Pakistan	10.18	11.44	9.54	6.08	4.51	
	Total South/Central Asia	279.15	391.80	375.00	354.43	409.57	
Australasia/Oceania	Australia	3.32	2.60	2.56	1.16	0.61	
	New Zealand	3.93	4.73	2.83	2.87	2.91	
Total Australasia/Oceania	7.34	7.34	5.39	4.03	3.53		
Total Asia-Pacific	576.39	809.70	738.50	718.24	755.62		
Europe							
Western Europe	Belgium	22.32	23.30	23.27	16.21	16.94	
	Denmark	7.55	8.61	10.55	8.66	10.69	
	France	30.52	34.85	21.90	26.42	25.45	
	Germany	133.93	157.11	119.13	114.95	107.22	
	Greece	12.16	17.13	12.94	12.16	11.29	
	Italy	76.67	96.79	83.60	83.68	86.89	
	Netherlands	73.76	93.64	103.55	87.59	107.63	
	Norway	7.03	7.03	5.00	4.25	5.14	
	Portugal	1.54	1.48	1.31	0.88	0.62	
	Spain	192.56	238.94	226.99	193.79	188.49	
	Sweden	7.76	6.22	6.32	5.41	4.55	
	Switzerland	2.23	1.94	2.69	2.78	2.45	
	United Kingdom	34.14	41.47	27.63	26.43	32.77	
	Total Western Europe	603.43	729.92	646.16	583.82	601.58	
	Central/ Eastern Europe	Azerbaijan	0.13	0.04	0.26	0.57	0.57
		Belarus	0.04	0.18	0.31	0.53	1.28
Bulgaria		2.88	2.19	2.10	2.74	3.09	
Croatia		4.47	5.70	3.24	3.11	4.70	
Czech Republic		1.89	2.04	1.06	1.49	1.27	
Estonia		12.26	19.41	11.58	14.86	4.09	
Georgia		2.09	2.85	1.93	5.42	2.31	
Latvia		1.57	2.12	2.74	1.98	3.15	
Lithuania		6.07	9.34	6.36	7.03	8.31	
Poland		3.98	7.34	5.52	6.19	7.27	
Romania		0.48	0.69	0.67	1.51	1.47	
Total Central/E. Europe	42.50	62.03	40.61	49.69	40.47		
Total Europe	645.93	791.95	686.77	633.51	642.05		
Middle East/Africa							
Middle East	Bahrain	1.73	1.47	1.33	1.30	1.48	
	Cyprus	1.29	1.22	0.97	1.19	1.06	
	Iraq	1.22	1.22	1.22	0.67	3.43	
	Israel	14.51	15.65	13.02	12.31	7.68	
	Jordan	12.62	12.79	14.80	21.57	11.23	
	Kuwait	3.36	3.70	3.76	4.21	4.40	
	Lebanon	3.96	3.82	3.14	4.82	8.97	
	Oman	0.53	0.70	0.49	0.60	1.52	
	Qatar	2.21	1.84	1.50	1.62	1.66	
	Saudi Arabia	23.15	23.07	19.14	24.82	24.07	
	Türkiye	61.38	66.70	67.31	77.89	100.43	
	United Arab Emirates	86.32	122.62	122.58	121.17	158.48	
Total Middle East	212.29	254.80	249.25	272.16	324.43		
North Africa	Algeria	9.74	8.48	10.10	15.87	16.98	
	Egypt	7.51	8.97	4.16	3.39	1.14	
	Lybia	2.16	8.79	5.90	12.36	14.24	
Total North Africa	28.06	65.86	40.21	63.04	77.68		
Total Sub-Saharan Africa	48.15	93.29	60.62	94.84	110.31		
Sub-Saharan Africa	South Africa	6.12	7.45	9.77	10.07	9.05	
	Total Sub-Saharan Africa	6.57	7.83	10.22	10.31	9.98	
	Total Middle East/Africa	267.01	355.92	320.10	377.31	444.12	
Total Shipments	Total Export Shipments:	1,598.16	2,090.05	1,869.30	1,848.26	1,963.92	
	Total U.S. Shipments:	774.25	808.08	764.64	716.36	728.06	
	Total Global Shipments:	2,372.41	2,898.13	2,633.95	2,564.61	2,691.98	

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 2023/24 are listed.

SHIPMENTS

DOMESTIC + EXPORT SHIPMENTS

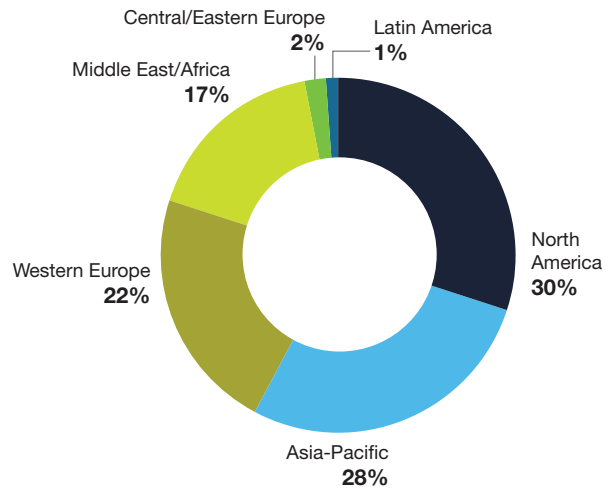
crop years 2019/20–2023/24 | million pounds



Source: Almond Board of California.

SHIPMENTS BY REGION

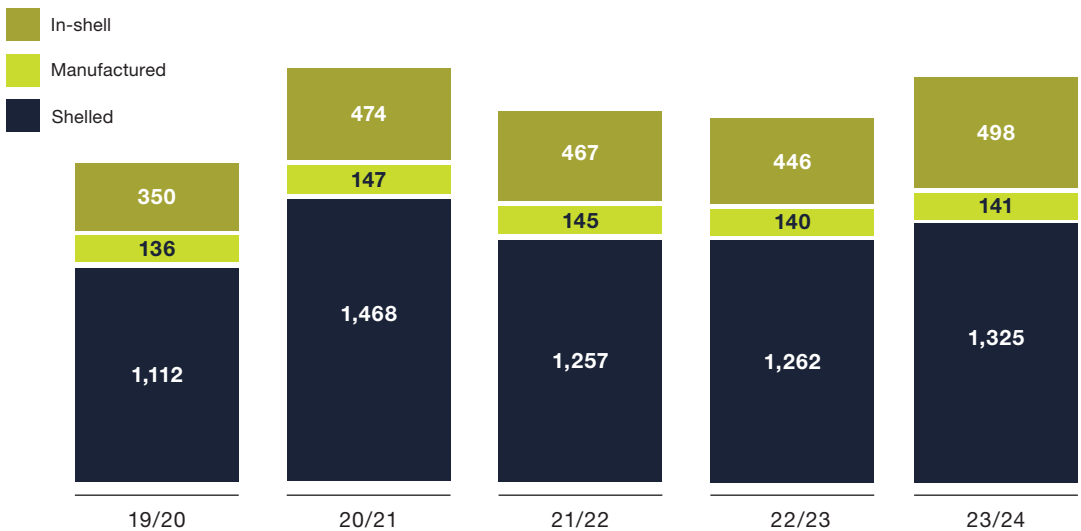
crop year 2023/24



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

EXPORT SHIPMENTS BY PRODUCT TYPE

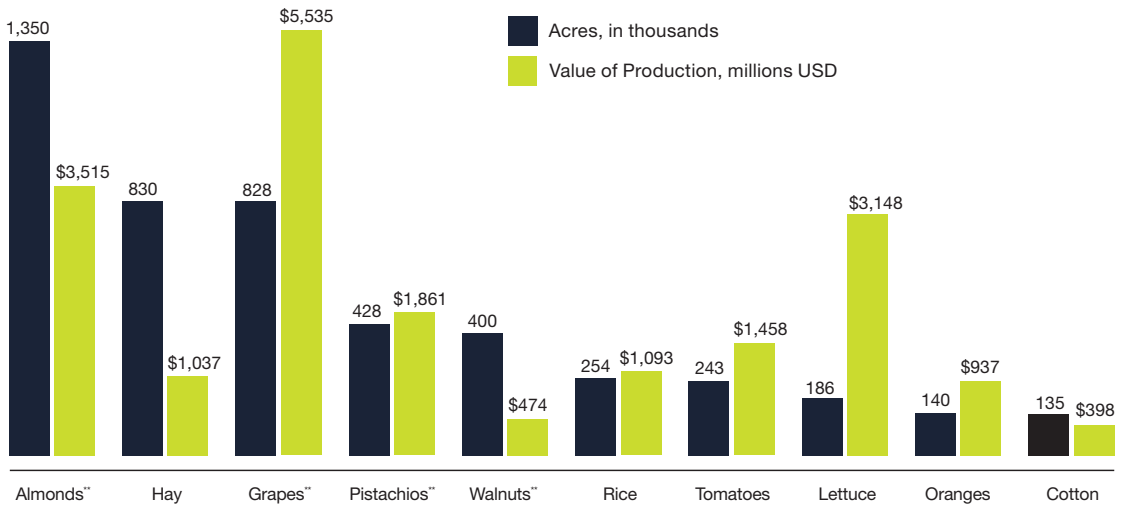
crop years 2019/20–2023/24 | million pounds



Source: Almond Board of California.

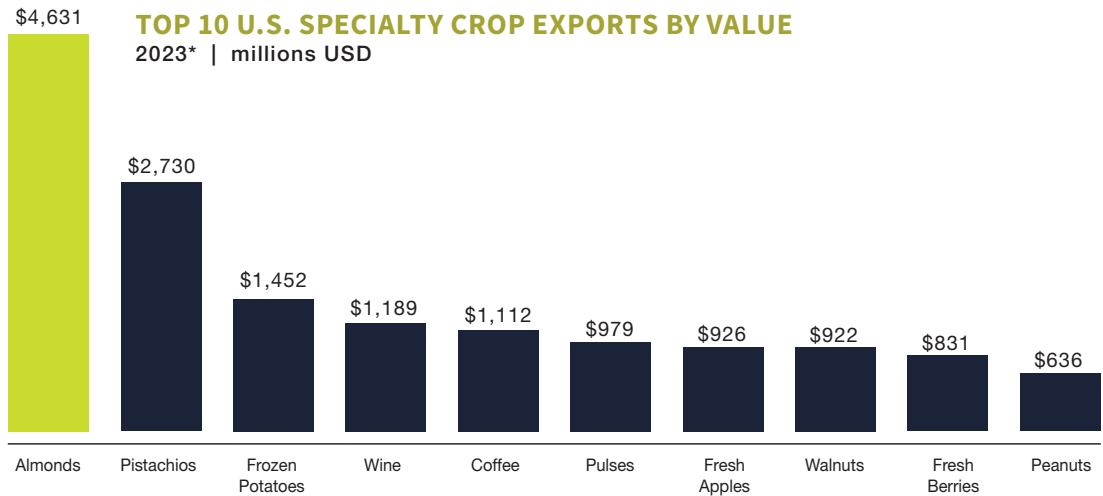
ALMONDS + OTHER CROPS

TOP 10 CALIFORNIA CROP ACREAGE 2022*



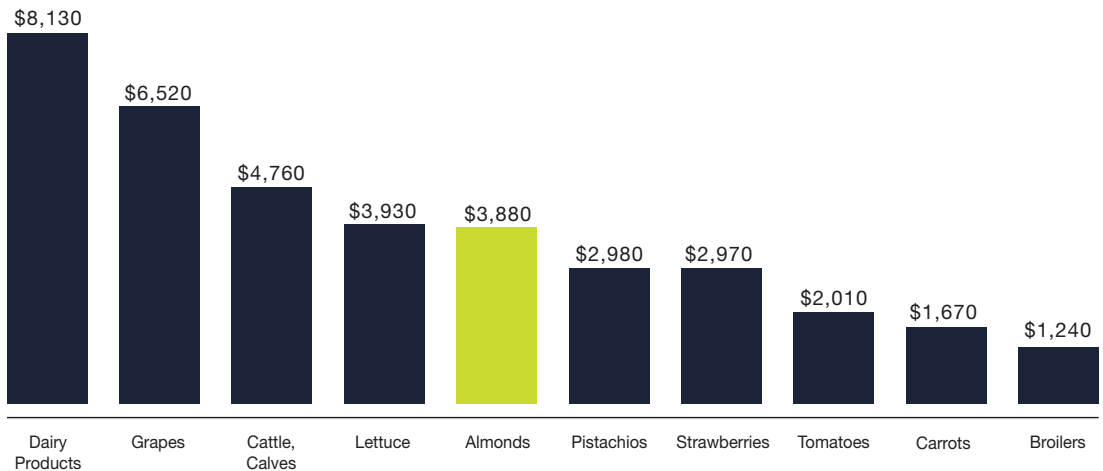
Source: California Department of Food and Agriculture, California Agricultural Statistics Review. *Calendar year January through December 2022. Value based on farm-gate prices. **Bearing acreage.

TOP 10 U.S. SPECIALTY CROP EXPORTS BY VALUE 2023* | millions USD



Source: U.S. Census Bureau Trade Data. *Calendar year January through December 2023.

CALIFORNIA'S TOP 10 VALUED COMMODITIES 2023* | millions USD

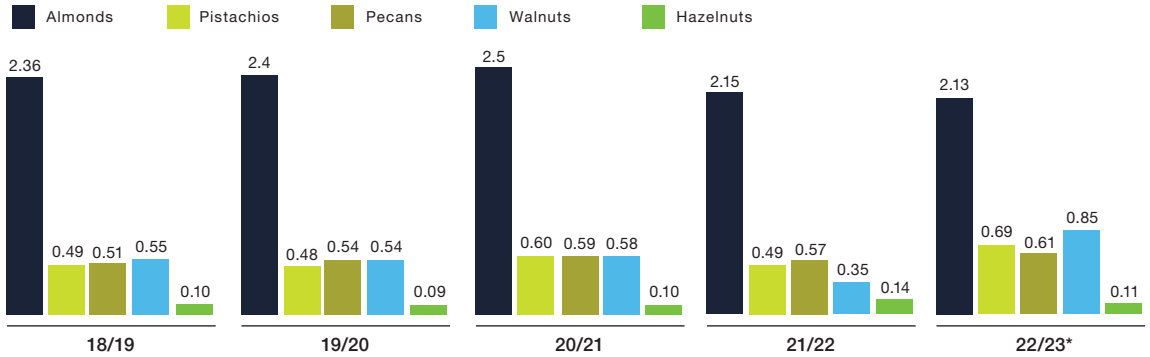


Source: California Department of Food and Ag/Statistics. *Calendar year January through December 2023.

SHIPMENTS

DOMESTIC PER CAPITA CONSUMPTION OF TREE NUTS

crop years 2018/19–2022/23 | pounds per capita



Source: USDA, Economic Research Service, Fruit & Tree Nut Situation and Outlook. *Preliminary.

U.S. PRODUCTION + IMPORTS OF COMPETING NUTS

crop years 2013/14–2022/23 | 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
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	20.4	2,868.2	582.1
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	23.4	2,795.4	666.9
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	27.0	2,705.1	668.1
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	18.7	3,372.6	697.2
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	23.5	3,233.5	738.8
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	30.1	3,518.9	720.2
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	26.5	3,670.4	755.9
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	20.1	4,558.3	705.7
2021/22	2,922.0	22.2	643.4	3.1	62.1	10.3	117.5	117.0	582.1	2.4	24.0	32.2	4,361.8	785.4
2022/23*	2,571.1	20.3	661.2	1.2	62.1	6.6	141.1	127.3	442.9	1.0	17.1	59.0	3,881.6	657.7

Source: USDA, Economic Research Service, Fruit & Tree Nut Yearbook Tables. Almond crop receipts are from Almond Board of California's year-end Position Report. *Preliminary.



930,000 acres of California almond orchards have good soil conditions for groundwater recharge.

Source: Land IQ, Groundwater Recharge Suitability Analysis, July 2023.



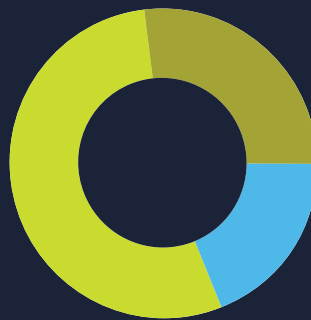
DRIVING GLOBAL DEMAND

LEVERAGING HOW WE GROW TO BUILD TRUST

Almonds are a unique food because we use everything we grow—the hull, shell and kernel. A key initiative for the Almond Board is to spur innovation to create higher value and even more sustainable uses of almond coproducts. ABC has funded more than 90 projects in promising research in areas like recycled plastics, biofuels and regenerative agriculture. Researchers are now assessing the value proposition of possible new product streams for these coproducts, expanding their work from laboratory to actual market viability.

ALMOND TREE FRUIT WEIGHT crop year 2023/24

Hulls **49%**
3.867 billion pounds



Kernels **31%**
2.446 billion pounds




Shells **20%**
1.578 billion pounds

Source: Kernel Weight—USDA Incomings received by Almond Board of California. Shell & Hull Estimations—Varietal Coproduct Ratios and Production Volumes (Almond Board of California 2020).





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