

ALMOND ALMANAC 2017

ANNUAL REPORT



WELCOME



ANNUAL REPORT

Almond Board of California's (ABC) Almond Almanac is an annual year-end report that provides a glimpse into what makes up the California Almond growing and processing community. The report provides a comprehensive overview of the Almond Board's programs and how we support all of the almond growers and processors in California. This includes the achievements various programs have made toward meeting ABC's mission and vision.

The Almond Almanac provides the latest statistics about California Almonds. The statistical analysis found in the report is prepared on a crop-year basis, spanning August 1 through July 31, and includes both current and comprehensive historical information about almond production, acreage and varieties, as well as shipment and market information. The statistical content is compiled using various 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

Bring great taste, health and vitality to people around the world through the enjoyment of California Almonds

MISSION

Make California Almonds essential to customers and consumers worldwide through innovative research, market development and industry support

Strategic Priorities + Supporting Objectives

Invest in programs and research that build market demand for almonds, making them the Nut of Choice

- Expand the science-based knowledge of the health benefits and functional attributes of almonds in dietary patterns and healthy lifestyles
- Increase consumers' perceived value of almonds throughout the supply chain
- Implement actions that mitigate trade and regulatory barriers
- Use market research and performance analysis for strategy development and resource allocation
- Further knowledge and understanding among consumers and customers about almond farming and environmental stewardship

Invest in programs and research that make almonds a Crop of Choice for California

- Accelerate sustainability¹ initiatives of California Almonds
- Enhance industry-wide quality and food safety
- Support innovative research to advance production, environmental and processing efficiencies
- Demonstrate leadership in adoption of water-use efficiency and supply practices
- Expand leadership commitment

Build an Almond Board organization that optimizes its effectiveness in establishing and executing goals

- Ensure that Almond Board representatives understand and adhere to fiduciary responsibility standards
- Provide resources that continually develop Board of Directors' skills and effectiveness
- Optimize staff and committee structures and processes
- Provide fact-based information to support industry advocacy efforts
- Enhance the relationship with and education of the growers and almond community to be health research, education and outreach

1. See page 9 for the Almond Board of California definition of sustainability.

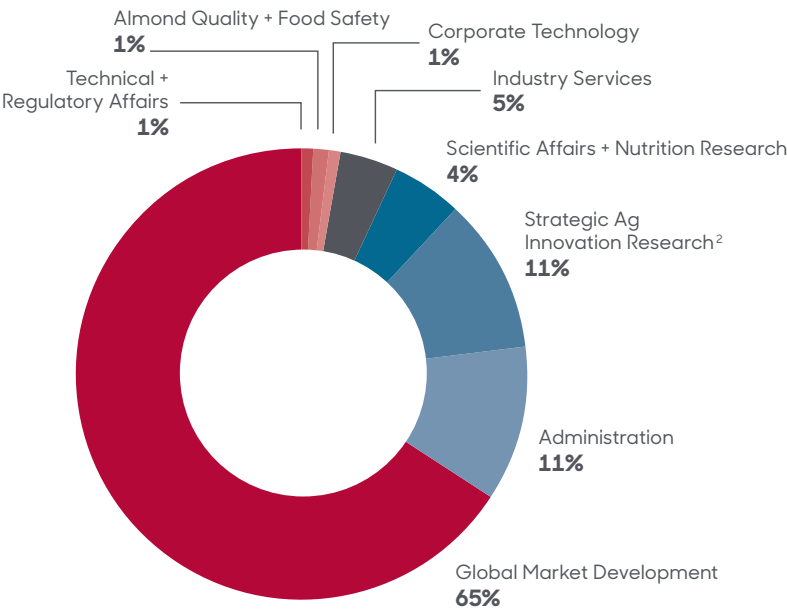
Almond Board of California Programs + Budget

Almond Board of California programs are funded by a handler assessment placed on each pound of almonds produced. Each year, the ABC Board of Directors, made up of both almond growers and handlers, approves the budget allocation for each program area.

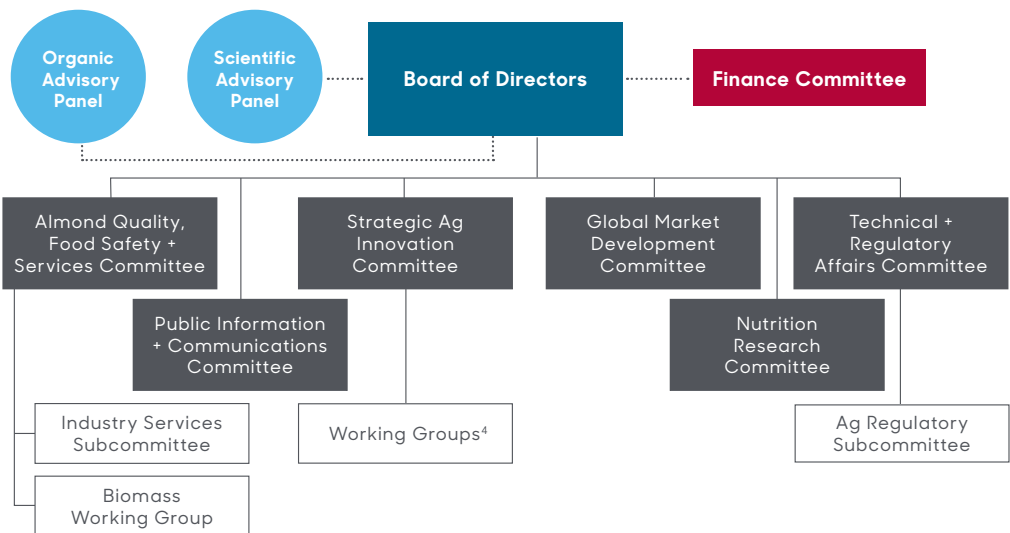
ABC programs are broken out into key areas and work together to educate consumers and to research, innovate and promote almonds to help meet our vision and mission. These areas are defined in the Program Budget Allocation chart below and program details can be found throughout the Almanac.

Program Budget Allocation

CROP YEAR 2016/17¹



Committee Structure³



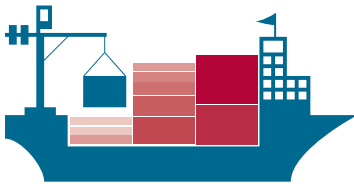
1. Totals may not add up due to rounding. 2. The Strategic Ag Innovation Research area encompasses funding for Production Research (2%), Environmental Research (1%), Accelerated Innovation Management Initiatives (1%) and Crop of Choice Initiatives (7%). 3. To best meet the needs of the California Almond industry, some committees were restructured in 2017. For questions about this or other changes, contact staff@almondboard.com. 4. Strategic Ag Innovation Committee working groups include Sustainability; Pest Management; Orchard, Tree and Rootstock; Irrigation + Nutrients, Soil Health; Harvesting; Pollination + Bee Health.

2017

What a Difference a Year Makes

Almond Board of California is always evolving to meet the needs of the California Almond industry, as well as ever-changing consumers, food professionals, health professionals, trade and regulatory issues.

2017 has continued to bring significant change, as ABC and the almond industry further unleash the potential of the California Almond orchard in new and different ways.



Two Billion Pound Mark:

For the first time ever, more than two billion pounds of almonds were exported.



The Year of Biomass:

In crop year 2017, ABC doubled down on its commitment to redefine orchard coproducts as valuable materials for other industries.



Growing Global Demand:

The Global Market Development Committee approved expansion of marketing programs in Germany, Japan, Italy, Mexico and further investigation into South America.



New Campaign Launches:

New integrated advertising campaigns launched in France and Germany, and the U.S. and Mexico will launch early 2018.



Irrigation Continuum:

With in-orchard support and a robust management guide, the Continuum helps farmers get the most out of every drop.



10th Anniversary:

Celebrating ten years of a robust food safety program through pasteurization.

The Rise of Plant-Based Proteins

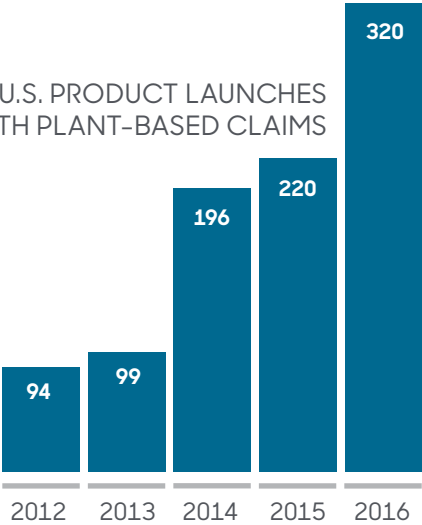
2017 saw the rise in popularity and importance of eating plant-based foods. Consumers are increasingly seeking plant-based foods for a variety of reasons: health, ethical and environmental factors.

Almonds are perfect for this trend.

As a nutritionally rich plant-based food, almonds are also highly functional and versatile for product manufacturers. And consumers love that they're natural and wholesome.

Increased almond milk consumption is an important part of this trend, and ABC marketing programs are reinforcing almond milk consumption by providing new and interesting usage ideas.

U.S. PRODUCT LAUNCHES WITH PLANT-BASED CLAIMS



Source: Innova Market Insights. February 2017.



ALMOND MILK SALES GREW BY **250%** BETWEEN 2011–2015¹

IN 2016, ALMOND MILK REPRESENTED NEARLY **16%** OF CALIFORNIA ALMONDS SOLD IN THE UNITED STATES²



We're Getting the Word Out



Almonds grow in a shell, protected by a hull, on a tree. The trees store carbon and are transformed into electricity at the end of their lives, the shells become livestock bedding, and the hulls are used as dairy feed. **Nothing goes to waste.**



Improved farming practices and **water-saving technologies** have helped reduce the **amount of water** it takes to grow one pound of almonds by 33% over the past 20 years.³



Considering trees' inherent carbon storage, **current almond farming practices are offsetting 50% of their carbon emissions.** With further production improvements and policy changes, almond farming could become carbon neutral or even carbon negative.⁴



California farmers go above and beyond when it comes to worker protections, food safety and the environment, following not only federal regulations, but also state and local ones, which are often more stringent.

1. The Nielsen Company, March 2016. 2. 2016 Nielsen U.S. Retail Product Movement Study. 3. University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990–94, 2000–14. 4. Alissa Kendall, et al. Lifecycle-based assessment of energy use and greenhouse gas emissions in almond production. Part 1: Analytical framework and baseline results. *Journal of Industrial Ecology*. 2015.

About California's Almond Industry

CALIFORNIA ALMOND GROWERS

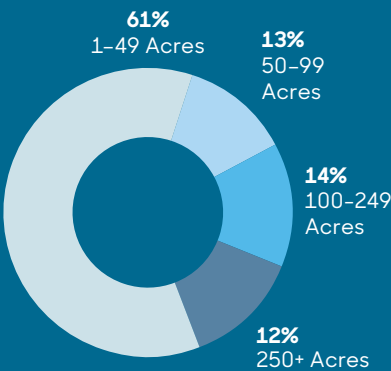
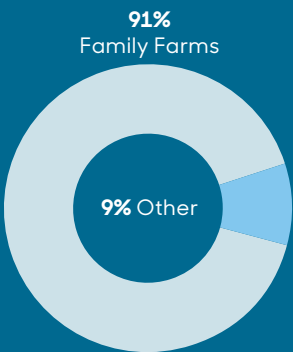
The California Almond growing community is driven by **family farmers**.

According to the most recent USDA Agricultural Census, there are around 6,800 California Almond farms. Many are owned and operated by third- and fourth-generation farmers who live on their land and plan to pass it on to their children and grandchildren.

CALIFORNIA ALMOND FARMS

Nearly **75%** 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. And regardless of size, all almond farmers recognize that growth must be matched by an unprecedented commitment to environmental responsibility, especially as they depend on natural resources for their livelihoods.



Source: USDA 2012 Census of Agriculture.

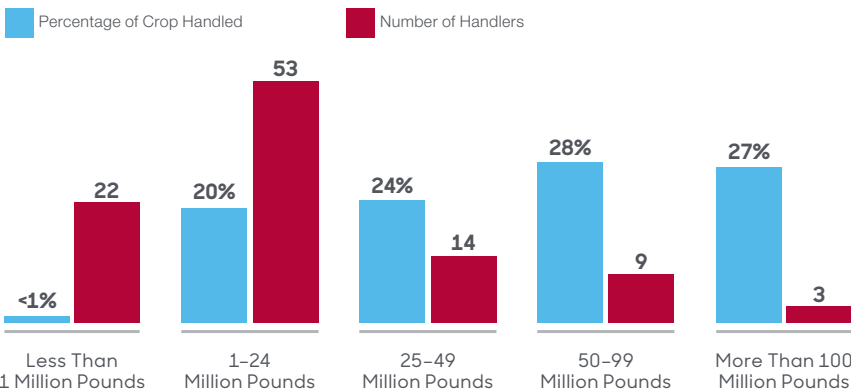


101 CALIFORNIA ALMOND HANDLERS

process almonds. Many of them are also **family owned and operated**.

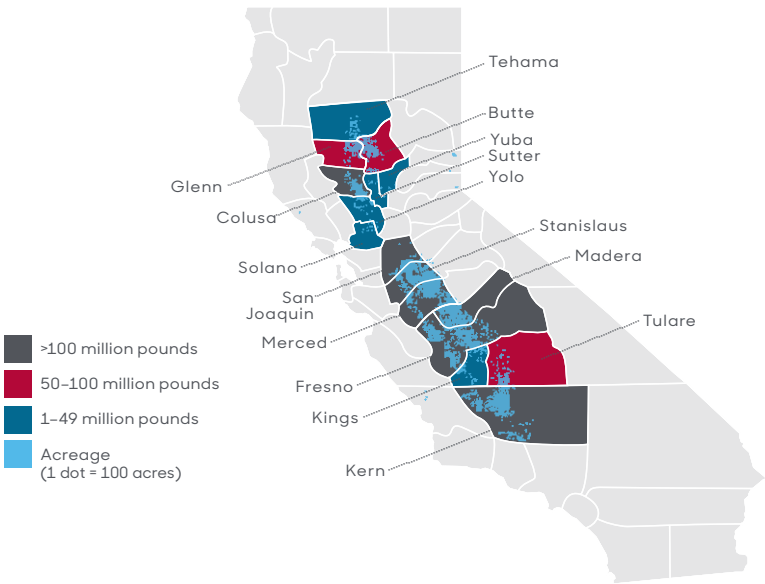
Distribution of Crop by Handler Size

CROP YEAR 2016/17



Where Almonds Are Grown

PRODUCTION BY COUNTY | CROP YEAR 2016/17



CALIFORNIA ALMOND DESTINATIONS

DOMESTIC

16/17 Domestic shipments marked the **largest in history at 676 million pounds**.

At 32% share of shipments, **the U.S. remains the #1 global destination** for California Almonds.

INTERNATIONAL

Export shipments went to more than **90 countries**.

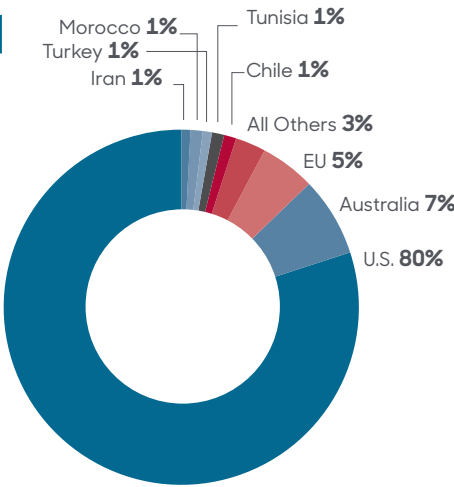
Spain was the #1 export market.

For the eighth year in a row, more than **one billion pounds were exported**.

The top ten export markets represent 71% of total export shipments.

World Almond Production

CROP YEAR 2016/17



Source: Almond Board of California, Almond Board of Australia and International Dried Fruit Council.

Growing to New Heights

Programs and Resources for the Almond Community

While Almond Board of California is a Federal Marketing Order in name, it does more than just promote almonds.

Through events, workshops, field-ready resources, tools and programs, ABC supports all those involved in growing and processing almonds.



The Almond Conference

The Almond Conference is the largest gathering of almond community members in the world and an opportunity to network while engaging with some of the world's most influential almond experts. Connect with exhibitors and experience the latest almond production practices, research findings and industry trends over three days of practical insights with take-home applications.

AlmondConference.com



Almond Leadership Program

Almond Board of California offers a one-year leadership training program that inspires and prepares almond community members to join a network of leaders who meet the challenges of a changing industry. More than 115 graduates!

Almonds.com/almondleadershipprogram

Ag in the Classroom

Almond Board of California offers several resources explaining how almonds grow, the history of California Almonds and the many ways to enjoy the versatile nut. Resources are designed to give elementary students a better understanding of where their food comes from and to expand their knowledge of agriculture, the environment and natural resources.



Workshops + Events

On-farm demonstrations, expert lectures and peer-to-peer sharing provides participants with opportunities for learning, collaborating and networking.

Almonds.com/upcomingevents

Serve on a Committee

More than 100 almond industry members volunteer on board-appointed committees, subcommittees and working groups to further the work of Almond Board of California.



Almond Ambassadors

Share your story about growing and processing almonds through social media, orchard/processing tours, media interviews and speaking opportunities.



To learn more about any of these programs, email staff@almondboard.com.



These resources and more can be found on Almonds.com/growers and Almonds.com/processors.



California Almond Sustainability Program

When it comes to being good stewards, California Almond growers and processors constantly challenge themselves to do more.

Tailor-made for the almond industry, the California Almond Sustainability Program (CASP) was established in 2009 to educate participants about responsible farming practices, facilitate continuous improvement and inform research priorities. It has evolved today to encompass nine educational self-assessment modules, two research-based calculators supporting on-farm decision-making, and regional workshops featuring expert lectures and peer-to-peer sharing.

In addition to the direct benefits to participants, collective information from the program contributes to telling the story of how California Almonds are grown.

Almonds.com/CASP

4,022

self-assessment modules completed

23%

of bearing acreage represented

2

research-based calculators available

623

irrigation schedules + nitrogen budgets created

145

educational workshops + events offered

2,500+

participants attended

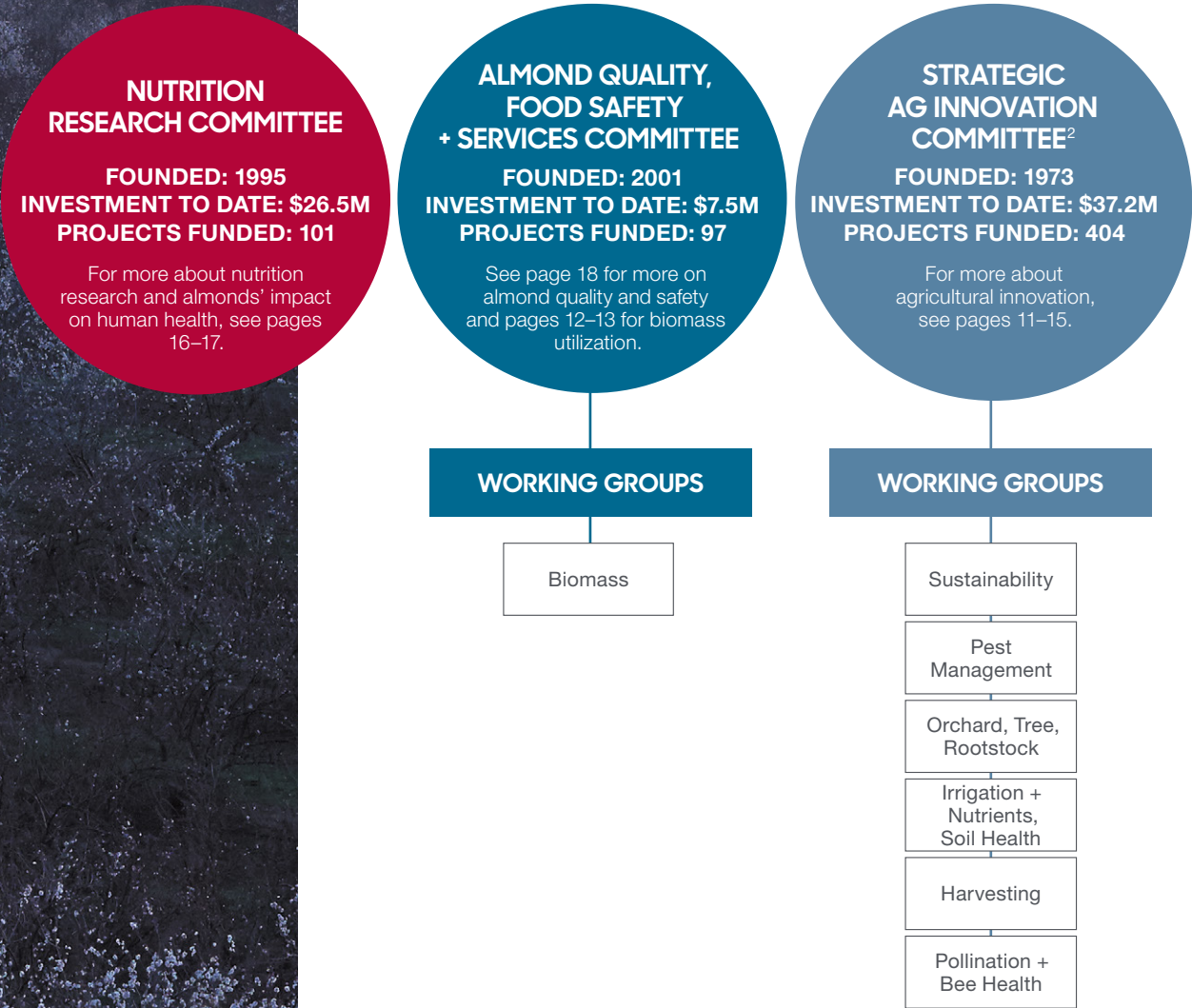


Innovation Through Research

Rooted in research and founded in fact, Almond Board of California supports the almond industry by investing in independent scientific research.

Since 1973, ABC’s research-focused committees have guided the investment of nearly \$70 million to build a foundation of knowledge across almonds’ impact on human health, ensuring food quality and safety, and increasing farming efficiencies while minimizing environmental impacts.

With increased funding in recent years, these programs are together helping California Almond farmers and processors provide almond lovers around the world a safe, wholesome and sustainable product.¹



1. Sustainable almond farming utilizes production practices that are economically viable and are based upon scientific research, common sense and a respect for the environment, neighbors and employees. The result is a plentiful, nutritious, safe food product.

Culture of Continuous Improvement

California’s almond farmers are committed to responsible stewardship of the land for the benefit of their families, communities and everyone who loves to eat almonds. Supporting that commitment is more than 40 years of investment in research to improve and evolve farming practices while minimizing environmental impacts.

By partnering with the likes of University of California, USDA’s Agricultural Research Service, Environmental Defense Fund and others, the California Almond industry is exploring new technologies and out-of-the-box solutions to address needs today and build the almond farm of the future.

Research Direction

New this year, the Strategic Ag Innovation Committee is charged with setting the strategic direction for research while new working groups support the committee, specializing in distinct areas of almond farming and processing. Working groups solicit and evaluate research projects to address specific needs?

Together, the research they manage aligns with four strategic focus areas designed to meet the needs of the California Almond industry while benefitting local communities and the environment.



Water Management and Efficiency:

Accelerating adoption of irrigation practices and technology that maximize crop per drop



Sustainable Water Resources:

Exploring on-farm groundwater recharge and diversifying California’s water supply



Air Quality:

Understanding farming-related air quality impacts and how to decrease emissions



22nd Century Agronomics:

Focusing on new technologies and out-of-the-box solutions to create the almond farm of the future

IN THE ORCHARD

Scientific improvements funded by the Almond Board’s research program make their way onto the farm through many channels but one of the most important is the California Almond Sustainability Program.

9

**Educational
Self-Assessment
Modules**

2

**Research-Based
Calculators**

- Irrigation Scheduling
- Nitrogen Budgeting

1

**Program Devoted
to Continuous
Improvement**



To learn how growers and processors can get involved, see page 9.

2. To best meet the needs of the California Almond industry, some committees were restructured in 2017. What were formerly known as the Production Research and Environmental committees have now merged into the Strategic Ag Innovation Committee and supporting workgroups. Questions about this or other committee changes? Contact staff@almondboard.com.

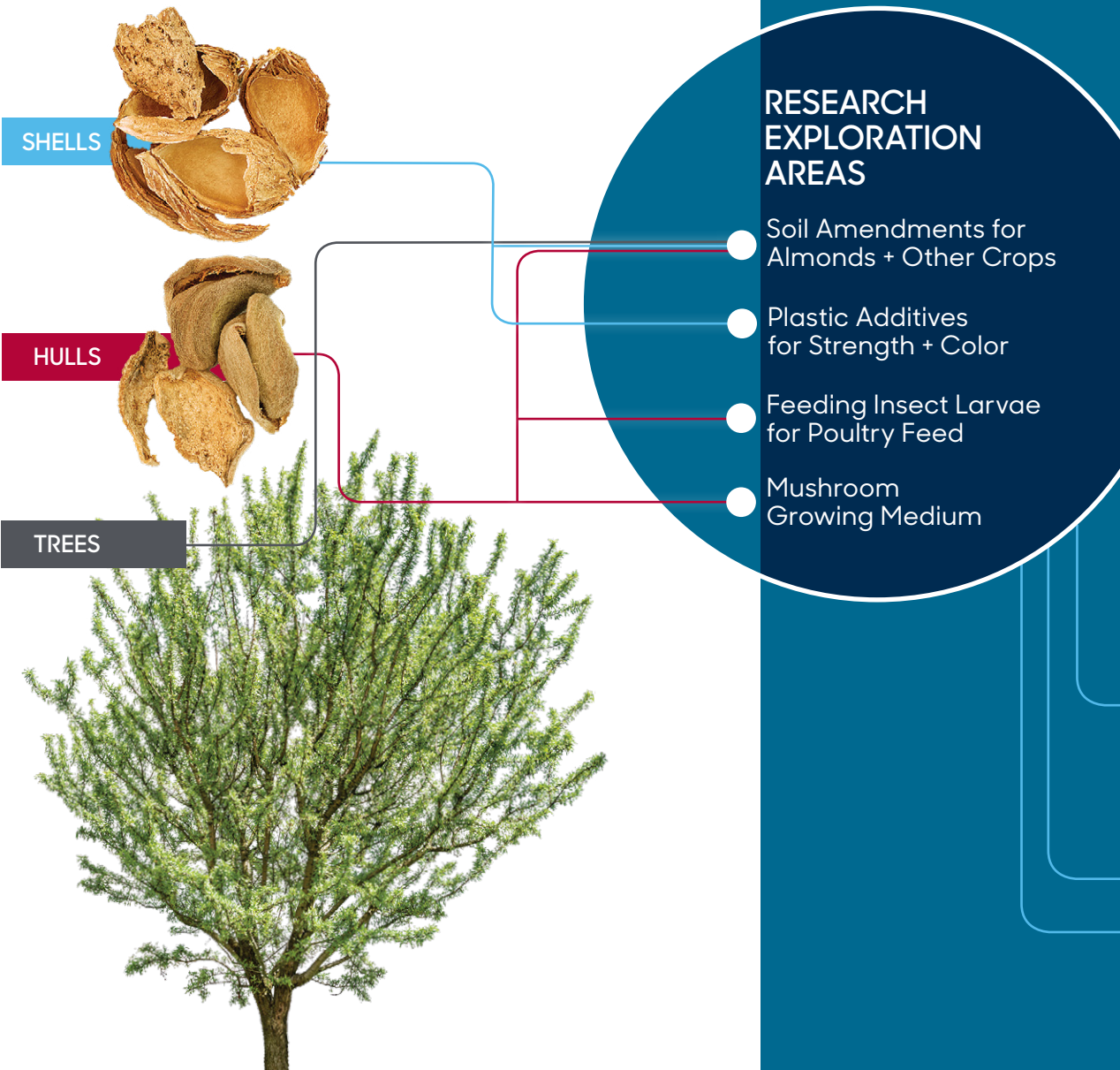
Science for Sustainable Orchard Systems

Waste Not

Almonds grow in a shell, protected by a hull, on a tree. The California Almond industry has always sought beneficial uses for these coproducts, like dairy feed, livestock bedding and generating electricity.

Thus, everything harvested from the orchard is used, minimizing waste and getting the most out of the resources used to grow almonds.

A changing market for these materials has led ABC to focus research investment on new uses for almond coproducts, embracing a zero-waste approach to ensure everything that comes from the orchard is used, addressing needs across multiple industries.





Did You Know?

Almond trees and the resources used to grow them produce more than just almonds.

For an analysis of everything our orchards grew in 2016, see page 30.

Our Orchards' Foundation

Healthy soils. They're vital to backyard gardens and almond orchards alike. Much is known about improving soil health in annual crops, but not all cropping systems are created equal. Those that stay in the ground for many years, like almonds, have unique needs and challenges.

ABC is investigating what healthy soil looks like for almond orchards and how farmers can take steps to ensure those conditions are found in their fields. Research currently underway is exploring a variety of management options, some utilizing almond coproducts. The goal of these projects is to improve soil health by increasing the soil nutrients, organic matter, microbial activity and beneficial organisms, as well as water infiltration and water-holding capacity.

IN ESTABLISHED ORCHARDS

- Spreading Compost: applying various sources of compost to orchard floors
- Spreading Hulls and Shells: grinding almond hulls and shells into smaller pieces and spreading across orchard floors
- Intentional Cover Cropping: planting appropriate stature crops in tree rows that will still allow for other cultural and harvest practices while minimizing additional water use

WHEN REPLANTING ORCHARDS

- Whole Orchard Recycling: grinding and discing entire almond orchards back into the soil
- Anaerobic Soil Disinfestation (Biosolarization): using hulls, shells, water, tarps and the sun to naturally deplete the soil of oxygen, making it inhospitable to key harmful soil pests

● Soil health research utilizing almond coproducts.

Getting the Most Out of Every Drop

Since 1982
Almond Board has funded

**200+ WATER
RESEARCH
PROJECTS**

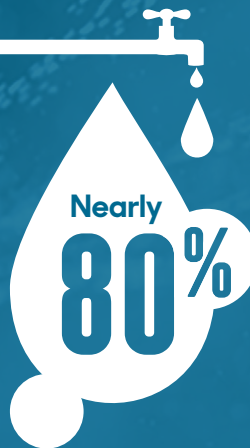
Why Grow Food in California?

California is **① of ⑤** places on Earth with the **Mediterranean climate** needed to grow **almonds**. Its cool, wet winters and hot, dry summers offer ideal growing conditions for many diverse crops, including almonds. More than 50% of the nation's fruits, vegetables and nuts are grown in California.

Water Wise

California Almond farmers are focused on responsible and efficient use of water, a precious and limited resource in California.

To support water sustainability in California, Almond Board is exploring to what extent **almond orchards can be used to replenish aquifers** when flooded with excess winter stormwater. Preliminary analysis indicates **675,000 acres** of California Almond orchards have moderately good or better soil suitability for this practice, though other factors are being examined as well.³




of almond orchards use efficient microirrigation.¹ Far above the 42% average for California farms in general.²

**WATER-SAVING
TECHNOLOGIES
LIKE MICROIRRIGATION**

have helped farmers

REDUCE
the amount of water it
takes to grow

1LB of 
by 33%
SINCE 1994⁴

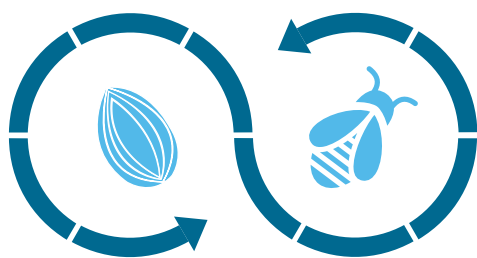
There's More to Do

While the California Almond industry has made strides in the area of water efficiency, there's more everyone can do. For the first time, almond irrigation recommendations have been gathered in a single resource, the Almond Irrigation Improvement Continuum. Developed over the past two years by almond irrigation experts, this resource provides a path to improvement for every almond farmer. **For more information, visit almonds.com/irrigation**

1. California Almond Sustainability Program. August 2017. 2. California Department of Water Resources. California Water Plan Update 2013: Volume 3, Chapter 2.
3. Land IQ. Groundwater Recharge Suitability Analysis. November 2015. 4. University of California. UC Drought Management. February 2010. Food and Agriculture Organization of the UN. FAO Irrigation and Drainage Paper 66 – Crop yield in response to water. 2012. Almond Board of California. Almond Almanac 1990-94, 2000-14.

Healthy Bees, Healthy Crop

Essential to Each Other



Every almond you eat exists because a honey bee pollinated an almond blossom.

Every honey bee that visits an almond orchard gets its first natural food source of the year there, supporting a healthy start to the pollination season¹.

Committed to Honey Bee Health

The decline in honey bee health has been linked to **five complex factors** and the California Almond industry has and continues to help address each one:

Almond Board has funded **100+ RESEARCH PROJECTS** supporting honey bees, more than any other crop group.²

VARROA MITES

Investigating treatment options and beekeeper guidance for treating this devastating pest

MANAGING PESTS AND DISEASES

Kickstarting Tech Transfer Teams made up of traveling bee doctors who work with beekeepers to monitor hives and advise on pest and disease treatment as necessary

LACK OF GENETIC DIVERSITY

Funding researchers to bring new, foreign genetic material into the U.S. and making it available to U.S. beekeepers for improving breeding stock

LACK OF FORAGE AND NUTRITION

Understanding the benefits and best management practices for supplemental forage and supporting the distribution of blooming plant seed to almond growers for helpful bee nutrition before and after almond bloom

PESTICIDE EXPOSURE

Understanding if pest control materials needed to protect the almond crop during pollination impact bees and how those materials can be applied to minimize impact

Helping Hives

California Almond farmers have widely adopted Honey Bee Best Management Practices to protect these essential pollinators.⁴

94%

of farmers coordinate with their beekeepers about what pest control materials may need to be used during bloom and, if necessary, how the beekeepers will be notified in advance.

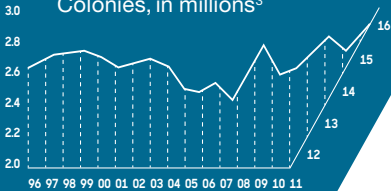
93%

of almond farmers provide clean water for bees to drink and cool themselves with while pollinating.

THE NUMBER OF U.S. HONEY BEE HIVES IS AT A 20-YEAR HIGH.

However, beekeepers still experience significant in-season losses and must work hard to maintain healthy apiaries.

U.S. Honey-Producing Bee Colonies, in millions³

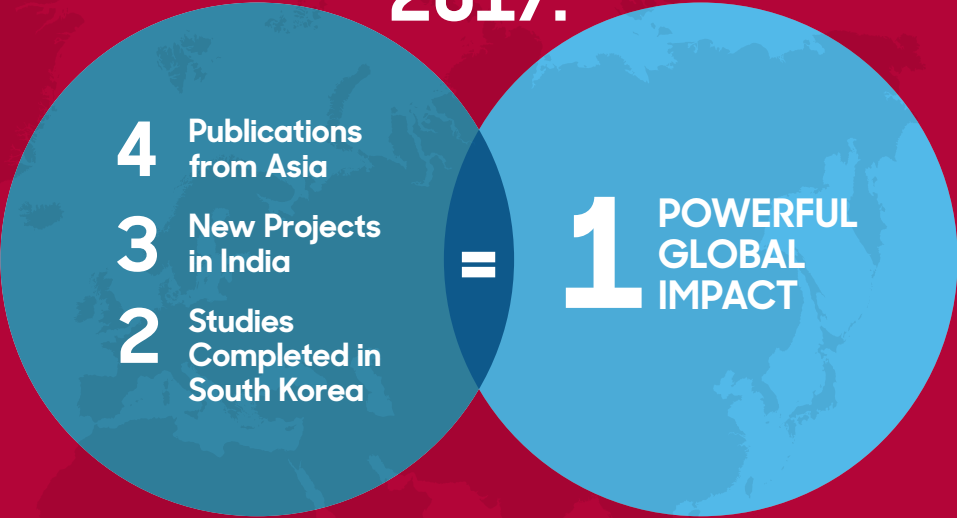


1. USDA-ERS. Land Use, Land Cover and Pollinator Health: A Review and Trend Analysis. July 2017. 2. Gene Brandi. Vice President, American Beekeeping Federation. 3. USDA-NASS. Honey Production Report. 1996-2016. 4. California Almond Sustainability Program. August 2017.

Nutrition Research: Crossing New Borders

The established body of almond nutrition research in the western world is large and growing, and is now beginning to expand in the eastern hemisphere.

Did You Know?
2017:



Commitment to Nutrition + Health Research 1995–PRESENT

101 Projects Investigating Almonds and Health
150 Published Studies



HEART HEALTH:
22 Research Projects
30 Scientific Publications to Date



DIABETES AND METABOLIC SYNDROME:
19 Research Projects
15 Scientific Publications to Date



WEIGHT MANAGEMENT, SATIETY AND GUT HEALTH:
23 Research Projects
37 Scientific Publications to Date



OTHER AREAS OF RESEARCH:

- Cognition
- Gut Microbiome
- Composition and Calorie Count
- Skin Health

Role of Almonds in Health of Korean Adults

A recent study highlights the benefits of adding almonds to a traditional Korean diet.¹ A carbohydrate-rich rice-based diet has been shown to predispose Koreans to obesity and related diseases.² Korean adults also tend to have insufficient vitamin E levels.³ This study shows that replacing a high-carbohydrate snack with almonds increases serum vitamin E and helps maintain healthy blood cholesterol levels.

90% of Korean Adults: Low Vitamin E, High Cardiovascular Disease Risk



- 23%: Vitamin E Deficiency
- 90%: Plasma Vitamin E Levels Below the Standard
- 10%: Plasma Vitamin E Levels Exceed the Standard

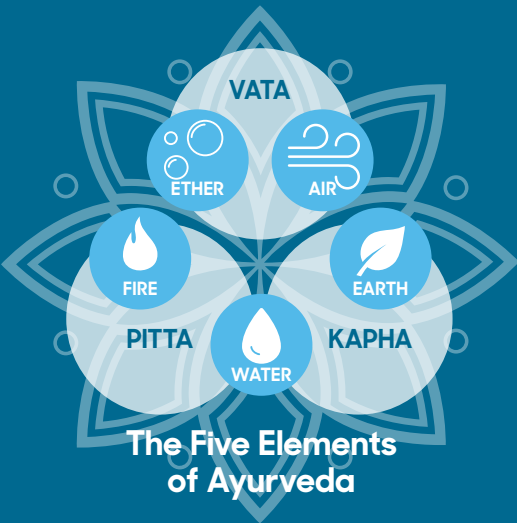


Almonds Support Healthy Cholesterol Levels and Body Composition in Koreans

A second study out of South Korea examined the impact of consuming almonds as a snack vs. just before meals on cholesterol levels and body composition. Results are expected to be published in early 2018.

Ayurveda: Traditional Indian Medicine + Almond Health Benefits

Ayurveda, an ancient Indian medicinal system dating back over 3,000 years, recognizes the health benefits of almonds and is fast becoming a global trend. According to ancient Ayurvedic text, almonds are used as a “poshaka” or tonic to help support all tissues, for “brimhana” or enhanced body bulk, for “balya” or enhanced muscle strength, as “vatanadi uttejaka” or nervous system stimulant, as “vatanadi balya” or nerve tissue nourisher, as “vrshya” or aphrodisiac, and for “varnya” or enhanced complexion and skin health protection. So ABC has funded an Ayurveda and almond health benefits project in a bid to connect the old findings to the new.



1. Jung H, Chen O, Blumberg JB, Kwak H-K. The effect of almonds on vitamin E status and cardiovascular risk factors in Korean adults: a randomized clinical trial. *European Journal of Nutrition* 2017 July 10 (Epub ahead of print; doi:10.1007/s00394-017-1480-5). 2. Kim J, Jo I, Joung H. A rice-based traditional dietary pattern is associated with obesity in Korean adults. *Journal of the Academy of Nutrition and Dietetics* 2012; 112(2):246-253. 3. Kim YN, Cho YO. Vitamin E status of 20- to 59-year-old adults living in the Seoul metropolitan area of South Korea. *Nutrition Research and Practice* 2015; 9(2):192-198.w



SINCE 2007

Almond Board has invested more than **\$5 MILLION** in food quality and safety research.

Almond Food Safety

2017 Marks an Important Food Safety Milestone

California Almonds have been at the forefront of food safety, and September 2017 marks the 10-year anniversary of protecting public health through mandatory almond pasteurization. Since the program's launch, there have been zero outbreaks of foodborne illness attributed to California Almonds. Almond pasteurization, along with other food safety programs, at every stage of growing and processing, help to protect the integrity of the product.

In 2017, Almond Board of California received notification from the Food and Drug Administration (FDA) recognizing that our 4-log reduction treatment standard is practically equivalent to presently accepted 5-log standard for use of the term pasteurization. This now makes it possible for companies to label 4-log treatment processes as "pasteurized" upon review by FDA.

Learn more about our comprehensive food safety program at Almonds.com/growers and Almonds.com/processors.

California Almonds are well positioned to comply with FDA's Food Safety Modernization Act because the almond industry proactively and voluntarily created and implemented programs that are already in line with FSMA requirements.

Pasteurization by the Numbers

211

Validated Processes

20

Process Authorities

19

Handlers with Validated Processes

23

Custom Processors

31

Direct Verifiable (DV) Users
(Manufacturers with Validated Machines)

18

DV Auditors

3

Countries with Validated Machines ¹

>16

Technologies Used

1.9 Billion

Estimated Total Pounds Validated Capacity

1. U.S., Canada, Mexico.

Global Technical + Regulatory Affairs

Relationship building is the primary focus of the Global Technical and Regulatory Affairs (GTRA) Team. Establishing relationships with government agencies in India, China, the EU and other markets has enabled ABC to resolve conflicts before they become a problem for the industry.

These relationships are pathways to educating authorities around the globe about almond industry practices, supply chain movement and the impact of regulatory decisions.

Building relationships with the staff of elected officials both in California and Washington, DC, allows ABC to become a fact-based resource when questions arise regarding policies or proposals that impact the California Almond industry.

The GTRA Team also maintains relationships with other groups and consultants that make up a network of expertise, ensuring early awareness of upcoming concerns.

These relationships result in a trusted reputation with almond industry stakeholders around the world.

2017 ACHIEVEMENTS

- 95+** Network of USDA Foreign Agricultural Service staff and offices leveraged to help quickly resolve trade issues
- 4** Hosted international trade delegations and government authorities from European Union, Middle East and Asia



Global Market Overview

ABC is charged with the mission of identifying the most suitable markets and target audiences that will provide the greatest return on investment to the almond industry. 2017 was a year of unprecedented industry growth, which included additional exploration and expansion of the marketing program.



Building Demand

ABC's marketing program has a long-standing commitment to help build demand in various countries. A sample of what was achieved in 2017:

4 Newly Approved¹ Markets:

Japan, Germany, Mexico and Italy

2 New Advertising Campaigns Launched:

France and Germany

7.25 Billion Impressions:

earned by ABC programs globally

7 Markets with Double-Digit Growth in Shipments:

U.S. +14%, Canada +24%, Japan +16%, South Korea +17%,
India +32%, France +20%, Germany +27%

1. Approved by Global Market Development Committee.

North America

United States + Canada

Reaching and Impacting Consumers in a Crowded Space

North America has one of the most cluttered and fast-paced media markets in the world. For almonds to stand out as a healthy snack, the marketing program focused on engaging with consumers and influencers throughout the day, wherever they were.

Market Summary

Active Since 1999 // FY17: 676 Million Pounds
Reaching: Consumers, Health Professionals, Food Professionals



Advertising



Public Relations

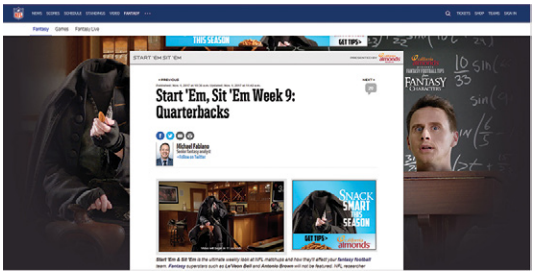


Social Media



Carpe PM Program:

Encouraged consumers to “seize the afternoon” by promoting the benefits of eating almonds as a snack for afternoon energy.



Fantasy Football and March Madness:

Leveraged to encourage our male target to choose almonds as a snack for energy — because it’s the right pick, every time.



Grow What You Know About Almonds:

Shared our sustainability story and encouraged environmentally focused consumers to learn more about almonds.

North American Consumers Rate

Almonds #1 for: Healthfulness, Helps with Weight Management, Heart Healthy, Perfect Snack for Me, Provides Vital Nutrients and numerous other measures.^{1,2}



Almond Milk:

Started proactive communications about the versatility and benefits of almond milk.

1. 2015 Consumer Attitudes, Awareness and Usage (AAU) Study, Sterling-Rice Group. 2. Scientific evidence suggests, but does not prove, that eating 1.5 ounces per day of most nuts, such as almonds, as part of a low in saturated fat and cholesterol diet may reduce the risk of heart disease. A one-ounce serving of almonds contains 14 grams of total fat, of which 9 grams are monounsaturated and 3.5 grams are polyunsaturated, and only 1 gram of saturated fat.

REGIONAL UPDATES



ALMONDS ARE
THE #1 NUT
for new product
introductions in
Europe, for the
second year¹

Europe

France,
Germany and
United Kingdom

A Changing Snack Culture

Embracing a changing snack culture is one thing that the UK, France and Germany all have in common, making it important to share how almonds fit into consumers' individual snack routines.

Market Summary

Active Since 2008

FY17: 666 Million Pounds to Western Europe

Reaching: Consumers



Advertising



Public Relations



Social Media

*Germany only [†]UK only



FRANCE

New "Nature Does Things Well" Advertising Campaign: The new French advertising campaign launched in December 2016 communicating that almonds are a natural, satisfying snack.

In France, almonds are ranked the #1 nut for: overall liking, healthfulness, associations with snacking, associations with baking, and positive story recall. Almonds are also the #2-ranked nut for top-of-mind awareness.²



GERMANY

New "Snack the California Sun" Campaign Launch: ABC entered Germany with substantial advertising and public relations investment for the first time to grow the demand for almonds as a snack. The campaign includes TV, print, digital, in-store, celebrity influencers and social.

Almonds Crowned "The King of Nuts": German national TV program named almonds the king of nuts due to their nutritional profile, health benefits and convenience.



UK

Reached Three Million UK Consumers: Spread the word of the Snacking Good campaign through collaborations with key influencers.

#2-Ranked Nut Among the UK Target: Almonds rated #2 for top-of-mind awareness and were the top-ranked nut for healthfulness and positive story recall.²

1. Innova Market Insights, Global New Product Database, 2016.

2. 2017 Consumer Attitudes, Awareness and Usage (AAU) Study, Sterling-Rice Group.



SHIPMENTS TO
INDIA GREW
32.1%



Almonds: An Important Part of Indian Heritage

Rooted in tradition, almonds are a significant part of the Indian culture. Tradition continues to be a key focus in marketing communications.

Market Summary

Active Since 2012 // FY17: 167 Million Pounds
Reaching: Consumers



Advertising



Public Relations

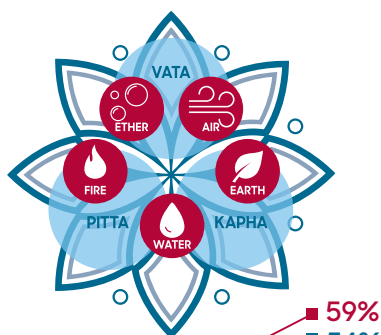


Diwali: Developed new program to increase the gifting of almonds during the festival of Diwali. Launched two commercials, positioning the gift of almonds as a symbol of close relationships.



Celebrity + Nutritionist Discussion Panel:

Almond Board's Emily Fleischmann and nutritionists Sheela Krishnaswamy and Ritika Samaddar hosted a mom panel discussion with popular actress-mother Namrata Shirodkar. The event resulted in 16.2 million media impressions in top-tier publications.



Ayurveda: Traditional Indian medicine text, Ayurveda, was reviewed for the first time as part of our Nutrition Research Program, and key findings relating to almonds were presented to media at a press conference. The work resulted in over 23.4 million impressions.



1. 2016 Consumer Attitudes, Awareness and Usage (AAU) Study, Sterling-Rice Group.

REGIONAL UPDATES



#1 NUT
IN CHINA
associated
with the Snack
and Bakery
categories

China

Differentiating Almonds Through Beauty

The modern Chinese woman is the power behind China's booming economy. And she's going nuts for beauty. By leveraging the California origin and vitamin E story, almonds are able to differentiate from competition by topping her beauty wish list.

Market Summary

Active Since 1999 // FY17: 150 Million Pounds
Reaching: Consumers, Food Professionals



Advertising



Public Relations



Social Media



Taste the Sunshine: Differentiated almonds from other nuts utilizing the Taste the Sunshine campaign, supporting skin, beauty and the California origin story.

Badanmu: Driven by strong associations among our target consumer, almonds in China are on an upward swing, overtaking the #1 snack association position and adoption of Badanmu name. Launched Follow the Sunshine mobile game campaign to educate consumers on the Badanmu name and the California origin.

South Korea

Competing in a Strong Nut Market

Almonds are gaining popularity in South Korea as a healthy, convenient snack. With heavy competition from walnuts and mixed nuts, the marketing program aims to educate consumers around specific almond benefits to differentiate them from other products.

Market Summary

Active Since 2011 // FY17: 54 Million Pounds
Reaching: Consumers



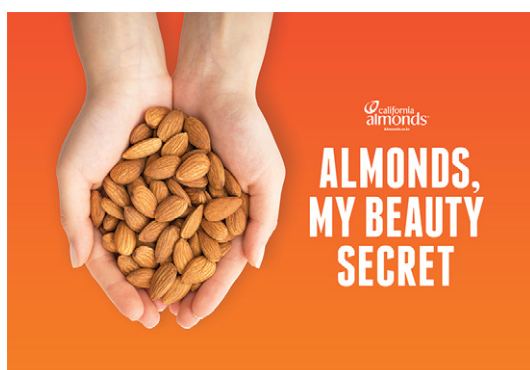
Advertising



Public Relations



Social Media



Launched Almonds, My Beauty Secret:

An integrated marketing campaign to educate consumers on the vitamin E and weight management attributes almonds provide.

#1 Top of Mind: For the first time ever, almonds are #1 for top-of-mind awareness in the nut category in South Korea¹ and lead all other markets for almond snack association²

1. South Korea Consumer Awareness, Attitude and Usage Study, Sterling-Rice Group 2016. 2. Global Perceptions Study, Sterling-Rice Group 2016.



#1 NUT
GLOBALLY
for new product
introductions
for the last
ten years¹

Trade Marketing + Stewardship

Almonds Evolve with Changing Tastes

Today's food companies are facing unprecedented challenges and change, coming from more informed consumers with high expectations, greater snacking needs and a desire for cleaner, shorter labels? This is in addition to the increased pressure on the food industry to push ahead on sustainability improvement. Almonds fit particularly well with these changing tastes and trends, and the marketing program aims to educate and inspire manufacturers to increase product innovation with almonds.

Program Summary

Active Since 2002

Reaching: Food Professionals



Advertising



Public Relations



Trade Shows, Webinars, eNewsletters and Media:

An array of touchpoints allows us to share research and resources with manufacturers and trade.



Online Sustainability Advertising Campaign:

New online executions in our trade advertising campaign educate about California Almonds' sustainability journey.

More Almond-Centric Products:

Taking the idea of almonds as an essential ingredient to a whole new level, an increasing number of new products are all about the almonds—in beverages, spreads, yogurts and gluten-free baked goods.

California Almonds Inspire New Products Worldwide

email share Facebook Twitter LinkedIn

28 Jun 2017 — According to new data from [Innova Market Insights](#), California almonds were the number one nut used in new products worldwide in 2016, the fourth year that almonds have held the lead position for nuts used in new product introductions.

According to the Innova Global New Products Report, almonds were featured in 35 percent of new food introductions featuring nuts in 2016, a five percent increase from the previous year. Key categories for worldwide almond product launches include bakery (23 percent), bakery (20 percent) and snacks (18 percent), as well as bars (12 percent) and cereal (one percent), while together account for 32 percent of almond product introductions. In more than 15 forms including almond milk, butter and flour, almonds are one of the most versatile nuts and the nut that is most top-of-mind for global consumers.

In addition to the top five categories for almond product introductions, the dairy and dessert categories also saw exciting growth. The dairy category, which includes almond milk, saw a 20 percent increase in almond introductions, and the dessert and ice cream category had an increase of 23 percent more almond products in 2016.

"Packaging is a key focus area, but there are certainly opportunities in other categories," says Julie Kinsman, Director for Europe for the Almond Board of California.

Butter-kissed almond also adds that almonds offer something extra from a health perspective. She says they meet the demand of consumers who are looking for more natural, unprocessed snacks, while simultaneously offering manufacturers a product that allows them to have a clean label.

The health associations of the almond can help enhance the healthy connotations of other products. "It's what we call a health halo, so it provides a health halo for many of the other products that almonds are in, for example chocolate, cereal, bakery, gluten-free."

"There are lots of different applications and categories in which we are seeing almonds growing," she adds. "If you look at almond milk for instance and the new market that has been created around non-dairy beverages, the



1. Innova Market Insights, Global New Products Database, 2016.
2. Global Perceptions Study, Sterling-Rice Group 2016.

Position Report of California Almonds

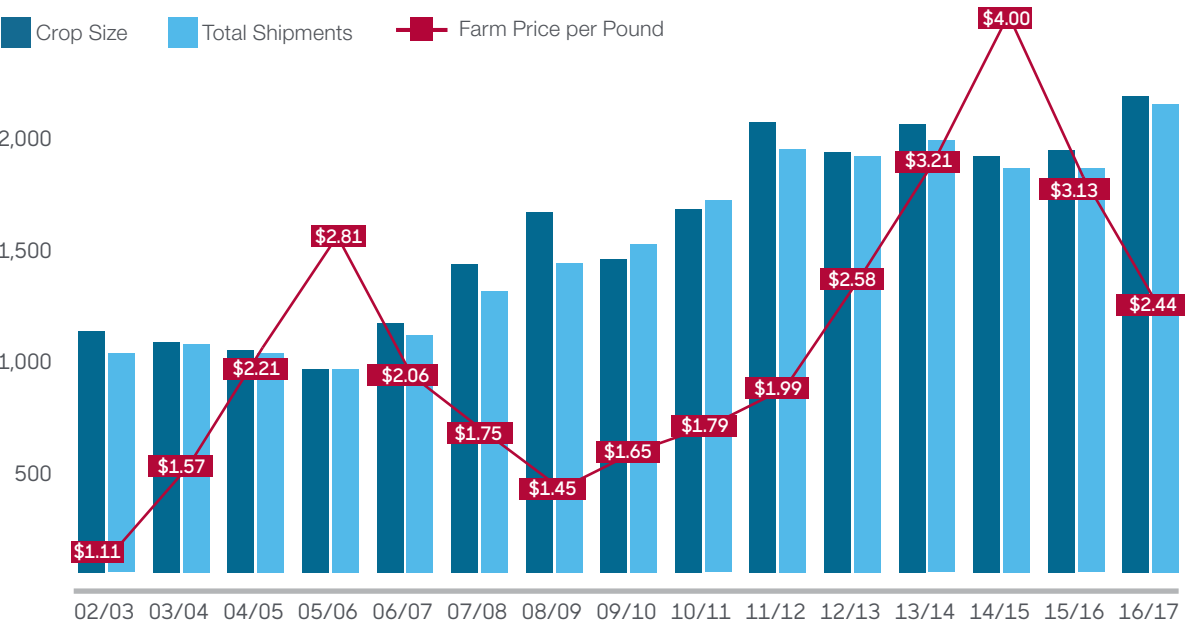
IN MILLION POUNDS | CROP YEARS 1998/99–2017/18*

| CROP YEAR | REDETERMINED MARKETABLE | CARRY-IN | RESERVE | TOTAL SALABLE SUPPLY | DOMESTIC SHIPMENTS | EXPORT SHIPMENTS | TOTAL SHIPMENTS | SALABLE CARRYOVER |
|-----------|-------------------------|----------|---------|----------------------|--------------------|------------------|-----------------|-------------------|
| 1998/99 | 492.4 | 172.0 | N/A | 664.4 | 167.0 | 405.5 | 572.5 | 91.8 |
| 1999/00 | 795.5 | 91.8 | 0.0 | 887.3 | 209.6 | 503.0 | 712.6 | 174.7 |
| 2000/01 | 672.4 | 174.7 | 0.0 | 847.1 | 211.2 | 528.7 | 739.8 | 107.3 |
| 2001/02 | 794.8 | 107.3 | N/A | 902.1 | 239.3 | 581.8 | 821.1 | 80.9 |
| 2002/03 | 1,063.5 | 80.9 | N/A | 1,144.4 | 291.7 | 690.6 | 982.4 | 162.0 |
| 2003/04 | 1,011.1 | 162.0 | N/A | 1,173.1 | 312.2 | 712.1 | 1,024.3 | 148.9 |
| 2004/05 | 972.8 | 148.9 | N/A | 1,121.7 | 331.6 | 652.5 | 984.1 | 137.7 |
| 2005/06 | 888.7 | 137.7 | N/A | 1,026.4 | 303.9 | 610.4 | 914.2 | 112.2 |
| 2006/07 | 1,087.8 | 112.2 | N/A | 1,200.0 | 368.3 | 697.8 | 1,066.1 | 133.9 |
| 2007/08 | 1,358.3 | 133.9 | N/A | 1,492.2 | 394.8 | 866.4 | 1,261.2 | 231.2 |
| 2008/09 | 1,571.9 | 231.2 | N/A | 1,803.1 | 411.0 | 978.4 | 1,389.4 | 413.7 |
| 2009/10 | 1,379.0 | 413.7 | N/A | 1,792.7 | 449.5 | 1,022.0 | 1,471.5 | 321.3 |
| 2010/11 | 1,600.3 | 321.3 | N/A | 1,921.6 | 489.7 | 1,177.9 | 1,667.6 | 254.0 |
| 2011/12 | 1,979.9 | 254.0 | N/A | 2,233.9 | 546.7 | 1,351.9 | 1,898.6 | 335.2 |
| 2012/13 | 1,848.4 | 335.2 | N/A | 2,183.6 | 588.4 | 1,278.0 | 1,866.5 | 317.2 |
| 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* | 2,205.0 | 398.7 | N/A | 2,603.7 | 700.0 | 1,500.0 | 2,200.0 | 403.7 |

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

Historical Crop Size + Shipments vs. Farm Price

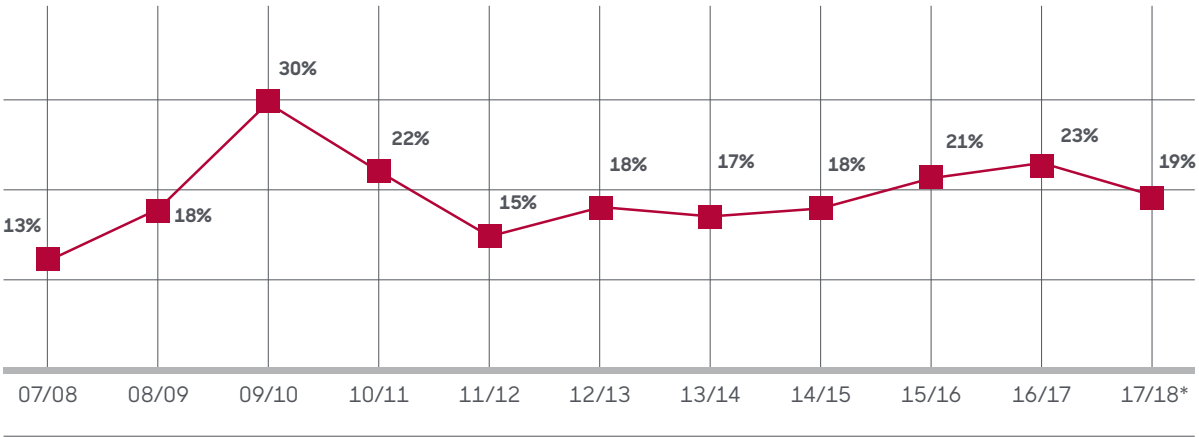
IN MILLION POUNDS | CROP YEARS 2002/03–2016/17



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

Carry-In as a Percentage of Prior Year Shipments

CROP YEARS 2007/08–2017/18*



Source: Almond Board of California.
*Estimated.

California Almond Crop Estimates vs. Actual Receipts

IN MILLION POUNDS | CROP YEARS 1998/99–2017/18*

| CROP YEAR | OBJECTIVE FORECAST | HANDLER RECEIPTS | LOSS AND EXEMPT | REDETERMINED MARKETABLE WEIGHT | LBS. REJECTS IN RECEIPTS |
|-----------|--------------------|------------------|-----------------|--------------------------------|--------------------------|
| 1998/99 | 540.0 | 517.0 | 24.6 | 492.4 | 14.9 |
| 1999/00 | 830.0 | 829.9 | 34.4 | 795.5 | 9.3 |
| 2000/01 | 640.0 | 698.4 | 26.0 | 672.4 | 15.7 |
| 2001/02 | 850.0 | 824.1 | 29.3 | 794.8 | 16.7 |
| 2002/03 | 980.0 | 1,083.7 | 20.2 | 1,063.5 | 8.2 |
| 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 | † | 45.0 | 2,205.0* | † |

Source: Almond Board of California. Objective Forecast provided by USDA, NASS California Field Office.
*Estimated.
†Not available at time of publication.

California Almond Acreage + Farm Value

CROP YEARS 2007/08–2017/18*

| ACREAGE | | | | | | YIELD | | VALUE IN DOLLARS | | |
|-----------|------------|-------------|-----------|---------------|------------------------|---------------------------|--|------------------|----------------------|------------------------|
| CROP YEAR | BEARING | NON-BEARING | TOTAL | NEW PLANTINGS | AVERAGE TREES PER ACRE | BEARING ACRE YIELD (LBS.) | PRODUCTION [†] (MILLION LBS.) | FARM PRICE | FARM VALUE (\$1,000) | VALUE PER BEARING ACRE |
| 2007/08 | 640,000 | 125,000 | 765,000 | 14,381 | 105 | 2,170 | 1,383.0 | \$1.75 | \$2,401,875 | \$3,753 |
| 2008/09 | 710,000 | 115,000 | 825,000 | 21,678 | 107 | 2,300 | 1,614.6 | \$1.45 | \$2,343,200 | \$3,300 |
| 2009/10 | 750,000 | 90,000 | 840,000 | 18,264 | 108 | 1,880 | 1,405.9 | \$1.65 | \$2,293,500 | \$3,058 |
| 2010/11 | 770,000 | 85,000 | 855,000 | 13,362 | 108 | 2,130 | 1,628.2 | \$1.79 | \$2,903,380 | \$3,771 |
| 2011/12 | 800,000 | 75,000 | 875,000 | 14,960 | 111 | 2,540 | 2,020.4 | \$1.99 | \$4,007,860 | \$5,010 |
| 2012/13 | 820,000 | 110,000 | 930,000 | 12,269 | 112 | 2,300 | 1,884.0 | \$2.58 | \$4,816,860 | \$5,874 |
| 2013/14 | 850,000 | 120,000 | 970,000 | 11,105 | 112 | 2,360 | 2,009.7 | \$3.21 | \$6,384,690 | \$7,511 |
| 2014/15 | 880,000 | 170,000 | 1,050,000 | 19,868 | 114 | 2,150 | 1,868.0 | \$4.00 | \$7,388,000 | \$8,395 |
| 2015/16 | 920,000 | 240,000 | 1,160,000 | 25,795 | 114 | 2,070 | 1,894.4 | \$3.13 | \$5,868,750 | \$6,379 |
| 2016/17 | 940,000 | 300,000 | 1,240,000 | 20,794 | 116 | 2,280 | 2,135.7 | \$2.44 | \$5,158,160 | \$5,487 |
| 2017/18* | 1,000,000* | ‡ | ‡ | ‡ | 117* | 2,250* | 2,250.0* | ‡ | ‡ | ‡ |

Source: USDA, NASS/PRO. Note: Almond Board does not track prices. *Estimated as of July 7, 2017. †Production numbers provided by Almond Board of California. ‡Not available at time of publication.



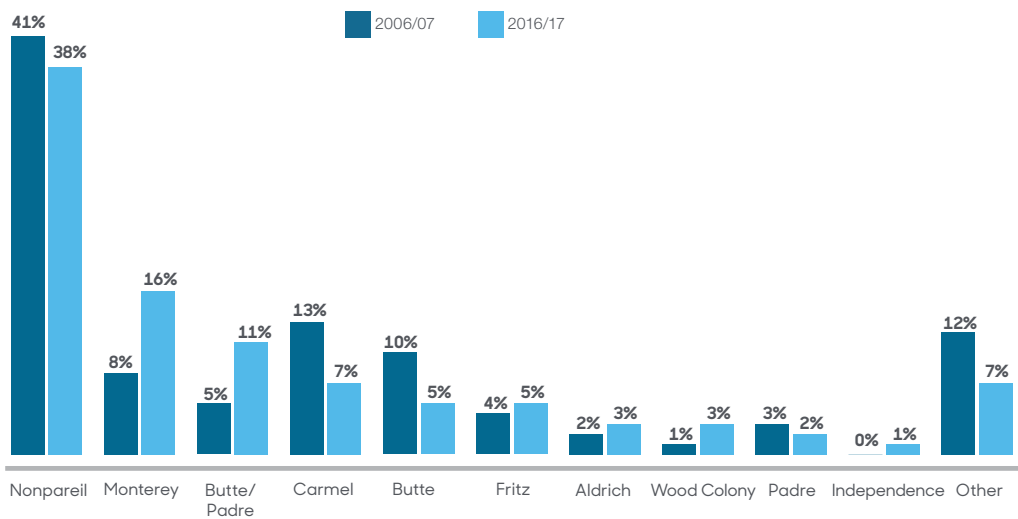
Accuracy + Transparency

Almond Board has partnered with Land IQ to map and analyze California’s almond acreage. While USDA-NASS reports will continue to serve as the official statistics for the industry, Land IQ’s findings are being used to evaluate and fine-tune the official estimates and serve as a complementary almond industry resource. For more information or to access the maps, visit Almonds.com/maps.



Top Ten Almond-Producing Varieties

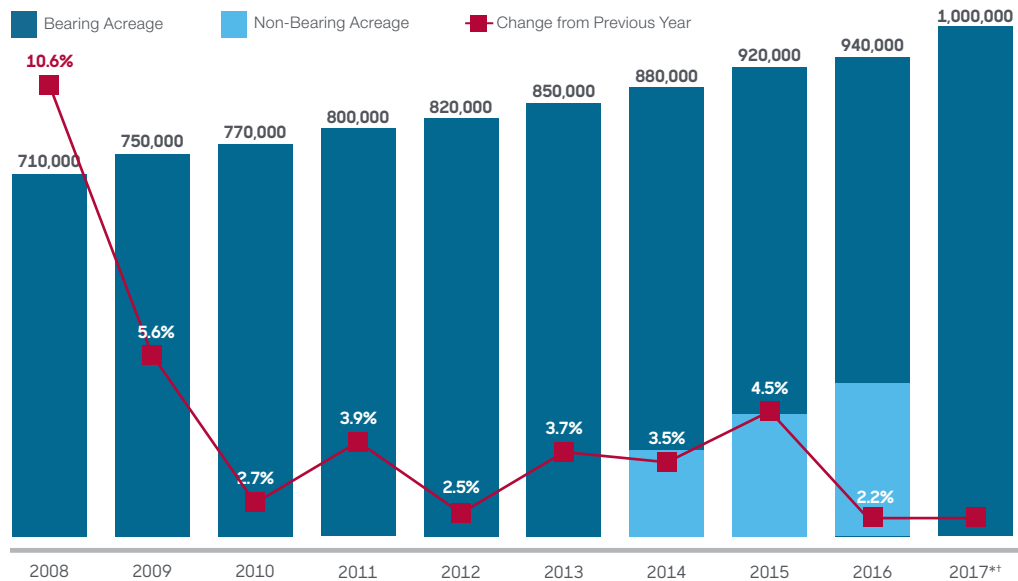
CROP YEAR 2006/07 VS. 2016/17 TONNAGE



Source: USDA Farm FV193. Report of Inedible Content of Almond Receipts.

California Almond Acreage

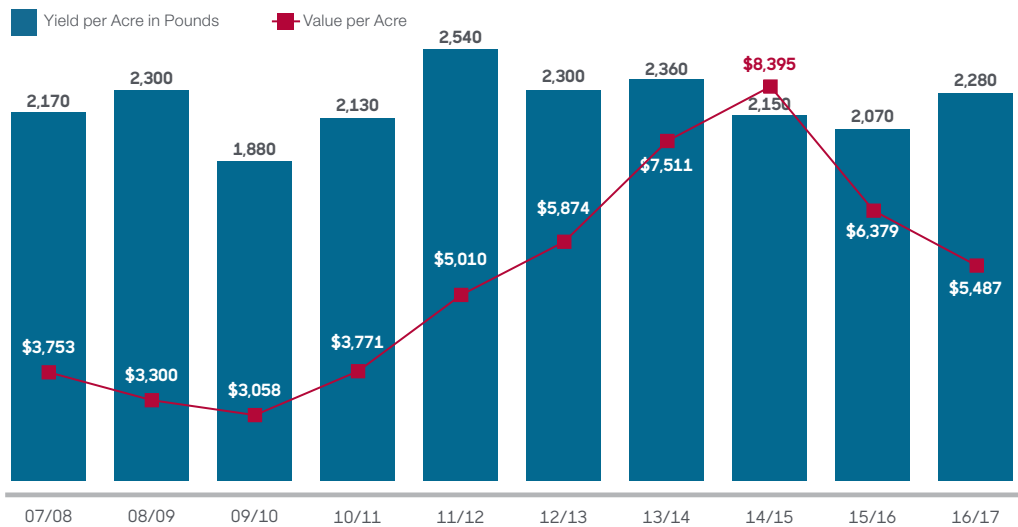
CROP YEARS 2008-2017



Source: USDA, NASS/PRO 2016 Acreage Report. *Non-bearing Acreage Report available in April 2018. **Estimate.

Crop Value + Yield per Bearing Acre

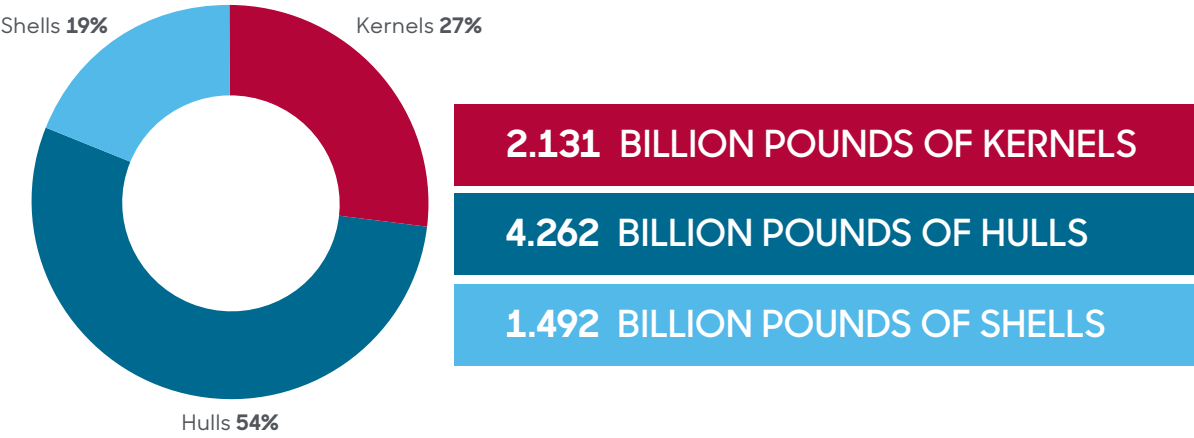
CROP YEARS 2007/08-2016/17



Source: USDA, NASS/PRO 2016 Acreage Report.

Almond Tree Fruit Weight

CROP YEAR 2016/17



Source: Kernel Weight - USDA Incomings received by Almond Board of California.
Shell and Hull Estimations - Almond Alliance of California. August 2017.

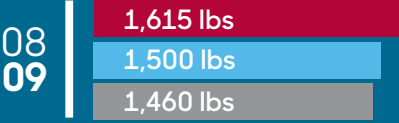
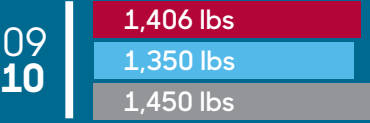
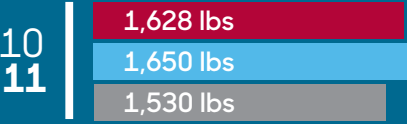
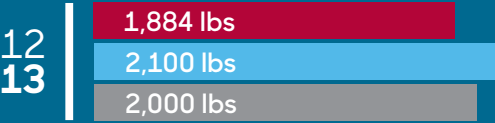
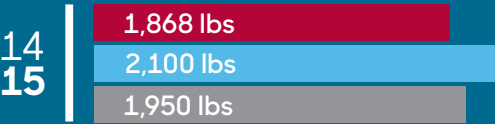
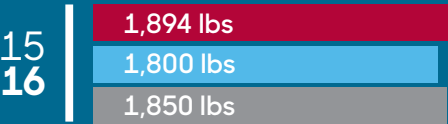
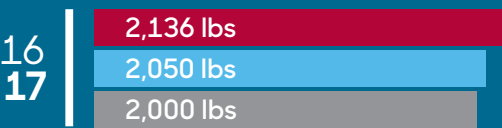
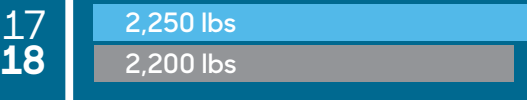


The California Almond industry generates **104,000 jobs** across California and **contributes \$11 billion to the state's GDP**.¹

California Almond Forecasts vs. Actual Production

CROP YEARS 2008/09–2017/18
IN MILLION POUNDS

- Actual Production
- Objective Forecast
- Subjective Forecast



Source: Almond Board of California, USDA-NASS California Field Office.

California Almond Production by County

IN MILLION POUNDS | CROP YEARS 2006/07-2016/17

County Growing Regions

| | NORTHERN | | | | | | | CENTRAL | | | SOUTHERN | | | | | | |
|-----------|----------|--------|-------|--------|--------|--------|------|---------|-------------|------------|----------|-------|-------|--------|--------|------------|---------|
| CROP YEAR | | | | | | | | | | | | | | | | | |
| | BUTTE | COLUSA | GLENN | SOLANO | SUTTER | TEHAMA | YOLO | MERCED | SAN JOAQUIN | STANISLAUS | FRESNO | KERN | KINGS | MADERA | TULARE | ALL OTHERS | TOTAL |
| 2006/07 | 41.8 | 50.8 | 38.4 | 2.5 | 4.9 | 7.7 | 6.3 | 124.6 | 55.6 | 163.6 | 232.7 | 247.8 | 17.7 | 100.1 | 21.5 | 1.3 | 1,117.3 |
| 2007/08 | 66.7 | 66.2 | 51.8 | 4.3 | 5.6 | 11.4 | 10.0 | 172.9 | 75.2 | 223.3 | 253.8 | 271.0 | 17.9 | 125.3 | 26.7 | 1.4 | 1,383.6 |
| 2008/09 | 56.9 | 86.0 | 48.6 | 4.1 | 5.3 | 9.7 | 10.4 | 187.3 | 82.1 | 240.6 | 322.2 | 354.3 | 23.4 | 142.7 | 36.2 | 1.0 | 1,611.0 |
| 2009/10 | 49.2 | 75.7 | 52.7 | 3.7 | 5.2 | 10.9 | 12.4 | 156.7 | 70.7 | 198.8 | 281.9 | 317.9 | 20.6 | 112.3 | 32.6 | 1.2 | 1,402.6 |
| 2010/11 | 47.1 | 83.0 | 55.8 | 4.4 | 4.9 | 11.7 | 13.6 | 164.2 | 68.0 | 202.5 | 344.2 | 403.5 | 29.9 | 149.7 | 42.4 | 1.6 | 1,626.6 |
| 2011/12 | 49.0 | 85.5 | 59.7 | 5.1 | 6.9 | 11.9 | 17.9 | 216.7 | 87.9 | 269.7 | 443.0 | 472.6 | 39.0 | 206.1 | 44.5 | 1.6 | 2,017.2 |
| 2012/13 | 50.9 | 85.1 | 57.9 | 5.4 | 7.0 | 12.5 | 18.1 | 201.4 | 91.5 | 261.8 | 413.6 | 393.4 | 30.7 | 203.5 | 49.1 | 2.1 | 1,884.1 |
| 2013/14 | 56.0 | 103.6 | 69.7 | 6.0 | 7.3 | 14.7 | 22.5 | 213.8 | 95.9 | 284.9 | 398.1 | 427.2 | 32.6 | 216.9 | 55.8 | 1.9 | 2,006.9 |
| 2014/15 | 55.2 | 90.2 | 58.7 | 5.1 | 7.7 | 13.3 | 18.1 | 198.2 | 94.3 | 274.4 | 370.5 | 390.3 | 31.9 | 202.9 | 57.0 | 1.9 | 1,869.7 |
| 2015/16 | 57.4 | 109.7 | 75.4 | 6.0 | 7.4 | 16.0 | 27.3 | 188.7 | 97.2 | 260.7 | 376.5 | 366.1 | 32.4 | 215.2 | 53.9 | 2.3 | 1,892.1 |
| 2016/17 | 54.3 | 104.0 | 68.9 | 6.2 | 8.3 | 17.4 | 28.0 | 222.3 | 104.9 | 291.0 | 433.2 | 433.2 | 40.3 | 242.6 | 73.9 | 2.1 | 2,130.6 |

Source: USDA Form FV193, Report of Inedible Content of Almond Receipts.



California Almond Receipts by County + Variety

IN POUNDS | CROP YEAR 2016/17

| COUNTIES | PERCENTAGE CROP | NONPAREIL | MONTEREY | BUTTE/PADRE | CARMEL | BUTTE | FRITZ | ALL OTHERS | ALL VARIETIES |
|--------------|-----------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|
| NORTHERN | | | | | | | | | |
| BUTTE | 2.5% | 22,801,057 | 2,518,168 | 2,522,918 | 4,847,085 | 3,683,706 | 473,814 | 17,421,991 | 54,268,739 |
| COLUSA | 4.9% | 44,311,433 | 11,636,980 | 995,700 | 10,566,391 | 13,166,844 | 6,701,405 | 16,651,452 | 104,030,205 |
| GLENN | 3.2% | 31,874,114 | 4,080,381 | 2,696,817 | 7,341,725 | 7,058,560 | 1,099,556 | 14,743,401 | 68,894,554 |
| MODOC | 0.0% | 6,249 | 0 | 0 | 0 | 6,051 | 0 | 11,821 | 24,121 |
| NAPA | 0.0% | 0 | 0 | 14,246 | 0 | 0 | 0 | 0 | 14,246 |
| SACRAMENTO | 0.0% | 0 | 0 | 0 | 1,382 | 0 | 3,765 | 0 | 5,147 |
| SHASTA | 0.0% | 64,170 | 0 | 0 | 15,734 | 54,358 | 0 | 59,461 | 193,723 |
| SISKIYOU | 0.0% | 4,923 | 0 | 0 | 0 | 0 | 0 | 23,922 | 28,845 |
| SOLANO | 0.3% | 3,018,953 | 303,663 | 212,310 | 376,247 | 1,052,075 | 8,804 | 1,257,956 | 6,230,008 |
| SONOMA | 0.0% | 0 | 0 | 0 | 0 | 0 | 0 | 1,554 | 1,554 |
| SUTTER | 0.4% | 2,428,519 | 575,577 | 783,283 | 703,138 | 1,024,744 | 97,421 | 2,664,192 | 8,276,874 |
| TEHAMA | 0.8% | 7,402,840 | 674,716 | 1,625,398 | 2,453,431 | 1,642,209 | 31,335 | 3,605,478 | 17,435,407 |
| YOLO | 1.3% | 11,521,549 | 3,909,078 | 1,078,067 | 2,006,099 | 2,914,362 | 834,764 | 5,730,345 | 27,994,264 |
| YUBA | 0.1% | 429,596 | 102,723 | 38,148 | 89,483 | 0 | 51,112 | 377,356 | 1,088,418 |
| TOTAL | 13.5% | 123,863,403 | 23,801,286 | 9,966,887 | 28,400,715 | 30,602,909 | 9,301,976 | 62,548,929 | 288,486,105 |
| CENTRAL | | | | | | | | | |
| ALAMEDA | 0.0% | 0 | 0 | 0 | 31,652 | 0 | 0 | 74,484 | 106,136 |
| CONTRA COSTA | 0.0% | 84,905 | 13,387 | 22,230 | 0 | 0 | 0 | 18,719 | 139,241 |
| MARIPOSA | 0.0% | 97,689 | 56,665 | 0 | 0 | 0 | 0 | 54,326 | 208,680 |
| MERCED | 10.4% | 78,064,182 | 24,095,050 | 27,402,897 | 23,632,024 | 11,206,133 | 11,124,243 | 46,793,902 | 222,318,431 |
| MONO | 0.0% | 0 | 5,897 | 0 | 0 | 0 | 0 | 11,433 | 17,330 |
| SAN JOAQUIN | 4.9% | 40,085,843 | 4,737,645 | 13,307,896 | 16,098,393 | 3,508,645 | 5,553,513 | 21,645,195 | 104,937,130 |
| STANISLAUS | 13.7% | 106,903,144 | 25,028,331 | 34,823,556 | 40,449,166 | 10,474,303 | 12,892,414 | 60,424,033 | 290,994,947 |
| TUOLUMNE | 0.0% | 15,816 | 0 | 0 | 0 | 0 | 0 | 20,763 | 36,579 |
| TOTAL | 29.0% | 225,251,579 | 53,936,975 | 75,556,579 | 80,211,235 | 25,189,081 | 29,570,170 | 129,042,855 | 618,758,474 |
| SOUTHERN | | | | | | | | | |
| FRESNO | 20.3% | 161,679,234 | 85,832,977 | 53,428,903 | 16,437,140 | 24,042,546 | 18,291,863 | 73,503,475 | 433,216,138 |
| KERN | 20.3% | 167,141,479 | 96,108,796 | 43,720,275 | 12,501,943 | 24,449,355 | 39,566,411 | 49,684,731 | 433,172,990 |
| KINGS | 1.9% | 13,716,754 | 8,124,688 | 7,189,248 | 982,320 | 1,526,533 | 2,324,175 | 6,342,672 | 40,206,390 |
| LOS ANGELES | 0.0% | 45,180 | 0 | 0 | 9,340 | 0 | 0 | 0 | 54,520 |
| MADERA | 11.4% | 92,038,592 | 46,144,707 | 33,969,274 | 15,716,950 | 6,583,411 | 10,994,604 | 37,170,649 | 242,618,187 |
| MONTEREY | 0.0% | 6,850 | 105,030 | 0 | 0 | 0 | 0 | 0 | 111,880 |
| RIVERSIDE | 0.0% | 0 | 0 | 0 | 0 | 0 | 0 | 6,331 | 6,331 |
| SAN BENITO | 0.0% | 0 | 0 | 0 | 0 | 0 | 0 | 54,038 | 54,038 |
| SIERRA | 0.0% | 0 | 0 | 0 | 0 | 0 | 0 | 7,253 | 7,253 |
| TULARE | 3.5% | 30,077,833 | 16,137,131 | 7,399,355 | 1,685,903 | 2,349,773 | 6,622,118 | 9,585,638 | 73,857,751 |
| TOTAL | 57.4% | 464,705,922 | 252,453,329 | 145,707,055 | 47,333,596 | 58,951,618 | 77,799,171 | 176,354,787 | 1,223,305,478 |
| GRAND TOTAL | 100.0% | 813,820,904 | 330,191,590 | 231,230,521 | 155,945,546 | 114,743,608 | 116,671,317 | 367,946,571 | 2,130,550,057 |


Source: USDA Form FV193, Report of Inedible Content of Almond Receipts.



Did You Know?
California’s Central Valley is one of the few
places in the world, and only place in the U.S.,
with an ideal almond-growing climate.

World Destinations

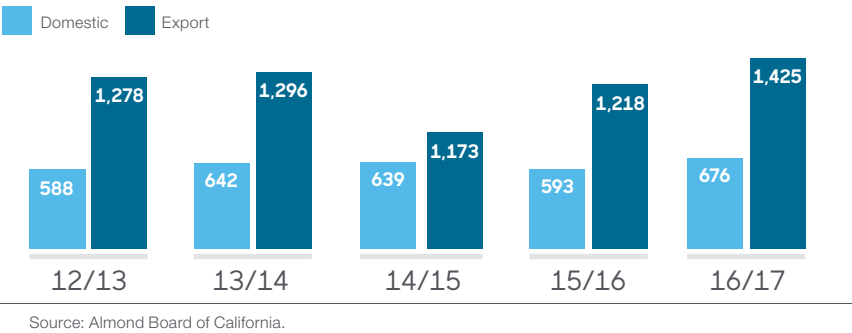
IN MILLION POUNDS | CROP YEARS 2012/13–2016/17

| Destination | | 2016/17 | 2015/16 | 2014/15 | 2013/14 | 2012/13 |
|--|---------------------------|----------|----------|----------|----------|----------|
| Americas | | | | | | |
| North America | Canada | 55.51 | 44.65 | 38.78 | 40.67 | 44.22 |
| | Mexico | 18.47 | 17.42 | 16.60 | 14.53 | 14.53 |
| | TOTAL NORTH AMERICA | 74.00 | 62.12 | 55.48 | 55.20 | 58.74 |
| Latin America/ Caribbean | Argentina | 1.64 | 0.51 | 0.97 | 1.21 | 0.74 |
| | Brazil | 2.67 | 1.24 | 2.07 | 4.03 | 1.89 |
| | Chile | 7.27 | 3.93 | 7.65 | 10.06 | 7.74 |
| | Colombia | 2.25 | 1.75 | 1.88 | 1.80 | 1.50 |
| | Costa Rica | 0.66 | 0.69 | 0.43 | 0.00 | 0.28 |
| | Peru | 1.81 | 0.97 | 1.06 | 1.42 | 0.99 |
| | Trinidad | 0.38 | 0.56 | 0.51 | 0.62 | 0.50 |
| TOTAL LATIN AMERICA/CARIBBEAN | | 17.35 | 10.36 | 15.58 | 21.07 | 14.44 |
| TOTAL AMERICAS | | 91.34 | 72.48 | 71.05 | 76.27 | 73.18 |
| Asia-Pacific | | | | | | |
| Northeast Asia | China/Hong Kong | 150.77 | 141.66 | 128.13 | 144.82 | 208.18 |
| | Japan | 71.15 | 61.31 | 65.87 | 75.85 | 65.96 |
| | South Korea | 54.45 | 46.23 | 53.48 | 53.50 | 45.99 |
| | Taiwan | 11.46 | 9.33 | 10.93 | 12.69 | 10.90 |
| TOTAL NORTHEAST ASIA | | 287.93 | 258.53 | 258.41 | 286.86 | 331.03 |
| Southeast Asia | Indonesia | 2.63 | 2.81 | 2.68 | 2.14 | 2.33 |
| | Malaysia | 5.62 | 6.37 | 4.16 | 5.96 | 4.95 |
| | Singapore | 3.57 | 3.33 | 3.65 | 3.50 | 2.24 |
| | Thailand | 3.97 | 4.12 | 4.00 | 4.15 | 3.80 |
| | Vietnam | 42.59 | 22.12 | 18.74 | 18.40 | 15.44 |
| TOTAL SOUTHEAST ASIA | | 59.15 | 39.25 | 33.53 | 34.40 | 28.99 |
| South/Central Asia | India | 167.08 | 126.45 | 123.69 | 102.16 | 125.09 |
| | Pakistan | 20.80 | 12.81 | 2.64 | 2.62 | 4.06 |
| | TOTAL SOUTH/CENTRAL ASIA | 193.44 | 140.10 | 127.01 | 105.44 | 130.12 |
| Australasia/Oceania | Australia | 3.54 | 2.77 | 4.54 | 4.01 | 5.81 |
| | New Zealand | 3.29 | 3.80 | 4.02 | 3.34 | 3.19 |
| | TOTAL AUSTRALASIA/OCEANIA | 6.84 | 6.58 | 8.56 | 7.34 | 9.01 |
| TOTAL ASIA-PACIFIC | | 547.36 | 444.45 | 427.52 | 434.04 | 449.14 |
| Europe | | | | | | |
| Western Europe | Belgium | 19.50 | 20.12 | 19.91 | 20.78 | 19.21 |
| | Denmark | 7.42 | 7.28 | 8.24 | 9.06 | 9.44 |
| | Finland | 0.61 | 0.53 | 0.72 | 1.01 | 1.04 |
| | France | 27.83 | 23.25 | 20.12 | 23.03 | 24.18 |
| | Germany | 130.21 | 102.81 | 122.15 | 126.82 | 121.03 |
| | Greece | 9.02 | 7.80 | 7.02 | 8.97 | 7.87 |
| | Ireland | 0.55 | 0.71 | 1.77 | 0.13 | 0.00 |
| | Italy | 58.14 | 57.72 | 42.52 | 53.47 | 37.22 |
| | Netherlands | 51.51 | 46.84 | 43.26 | 45.34 | 41.90 |
| | Norway | 5.44 | 6.56 | 5.41 | 4.48 | 4.73 |
| | Portugal | 1.77 | 1.43 | 1.34 | 2.39 | 1.73 |
| | Spain | 210.63 | 201.10 | 153.06 | 193.40 | 158.52 |
| | Sweden | 5.66 | 6.70 | 6.24 | 6.68 | 7.94 |
| | Switzerland | 3.60 | 7.90 | 6.82 | 8.60 | 6.64 |
| | United Kingdom | 34.37 | 32.45 | 29.18 | 27.86 | 26.41 |
| TOTAL WESTERN EUROPE | | 566.45 | 523.31 | 468.04 | 532.32 | 468.34 |
| Central/ Eastern Europe | Bulgaria | 2.11 | 1.86 | 2.09 | 2.94 | 1.96 |
| | Croatia | 1.87 | 1.13 | 1.59 | 1.62 | 1.57 |
| | Czech Republic | 2.11 | 1.41 | 2.32 | 2.70 | 3.50 |
| | Estonia | 6.28 | 3.85 | 1.81 | 1.41 | 2.19 |
| | Latvia | 1.55 | 0.62 | 1.15 | 1.95 | 2.19 |
| | Lithuania | 3.23 | 1.80 | 3.41 | 4.15 | 2.85 |
| | Poland | 2.93 | 1.82 | 1.53 | 1.89 | 2.14 |
| | Romania | 1.10 | 0.67 | 0.48 | 0.00 | 0.00 |
| | Russia | 1.15 | 0.44 | 0.93 | 32.51 | 45.28 |
| | Ukraine | 0.77 | 0.53 | 0.63 | 2.17 | 3.32 |
| TOTAL CENTRAL/EASTERN EUROPE | | 25.65 | 15.97 | 18.83 | 55.48 | 65.63 |
| TOTAL EUROPE | | 592.10 | 539.28 | 486.87 | 587.80 | 533.97 |
| Middle East/Africa | | | | | | |
| Middle East | Bahrain | 1.15 | 0.94 | 0.69 | 1.03 | 0.57 |
| | Cyprus | 1.12 | 1.06 | 0.95 | 1.29 | 1.38 |
| | Israel | 10.49 | 8.72 | 7.14 | 6.35 | 2.38 |
| | Jordan | 10.17 | 8.60 | 6.43 | 8.51 | 6.62 |
| | Kuwait | 4.27 | 3.62 | 2.88 | 2.48 | 3.31 |
| | Lebanon | 5.46 | 6.76 | 4.86 | 5.15 | 4.55 |
| | Saudi Arabia | 20.83 | 14.19 | 13.54 | 14.27 | 9.81 |
| | Turkey | 53.46 | 37.15 | 36.59 | 52.70 | 39.21 |
| | United Arab Emirates | 64.37 | 57.32 | 98.07 | 86.08 | 81.40 |
| TOTAL MIDDLE EAST | | 173.59 | 139.37 | 171.87 | 178.16 | 149.64 |
| North Africa | Algeria | 9.93 | 8.33 | 6.02 | 6.40 | 11.61 |
| | Egypt | 1.91 | 5.73 | 3.27 | 3.98 | 4.61 |
| | Tunisia | 1.22 | 3.02 | 0.51 | 1.72 | 0.00 |
| TOTAL NORTH AFRICA | | 14.58 | 17.74 | 10.87 | 13.82 | 17.59 |
| Sub-Saharan Africa | South Africa | 5.57 | 4.47 | 4.77 | 5.05 | 4.13 |
| | TOTAL SUB-SAHARAN AFRICA | 5.87 | 4.73 | 4.95 | 5.48 | 4.53 |
| TOTAL MIDDLE EAST/AFRICA | | 194.04 | 161.83 | 187.69 | 197.45 | 171.76 |
|  Total Shipments | Total Export Shipments | 1,424.83 | 1,218.05 | 1,173.14 | 1,295.57 | 1,278.05 |
| | Total U.S. Shipments | 675.96 | 593.19 | 639.40 | 641.81 | 588.40 |
| | TOTAL GLOBAL SHIPMENTS | 2,100.79 | 1,811.24 | 1,812.53 | 1,937.38 | 1,866.45 |

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 2016/17 are listed.

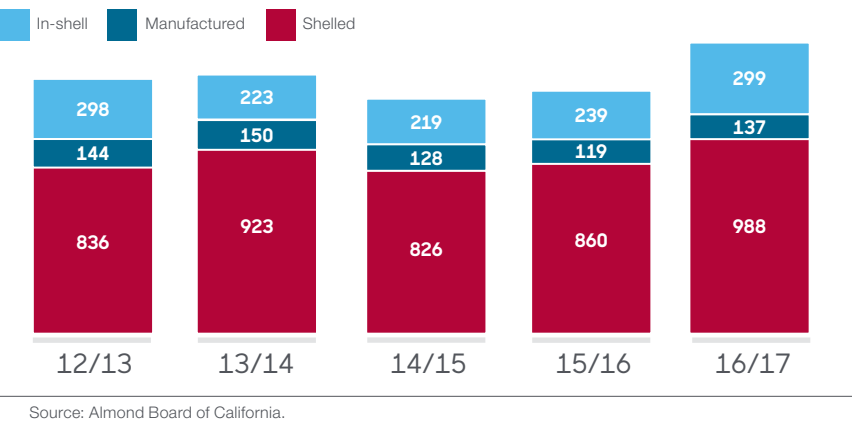
Domestic + Export Shipments

IN MILLION POUNDS | CROP YEARS 2012/13–2016/17



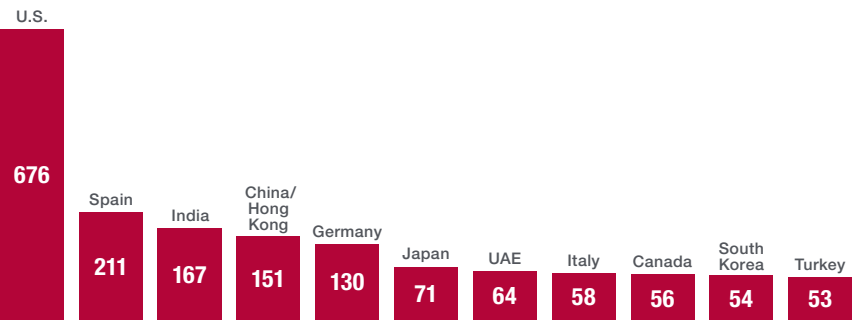
Export Shipments by Product Type

IN MILLION POUNDS | CROP YEARS 2012/13–2016/17



Top 10 Global Destinations

IN MILLION POUNDS | CROP YEAR 2016/17



Top ten export markets represent **65%** of total export shipments.

Source: Almond Board of California, July 2017 Position Report.

Shipments by Region

CROP YEAR 2016/17

North America

36%

Western Europe

27%

Asia-Pacific

26%

Middle East/Africa

9%

Central/Eastern Europe

1%

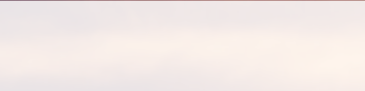
Latin America

1%

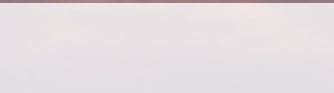
Source: Almond Board of California.
Note: Totals may not add precisely due to rounding.

California's Top Ten Valued Commodities

2016 | IN MILLIONS USD



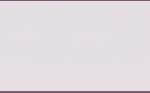
\$6,070 Milk + Cream



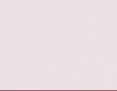
\$5,580 Grapes



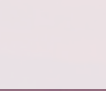
\$5,160 Almonds



\$2,530 Cattle + Calves



\$1,960 Lettuce



\$1,830 Strawberries



\$1,500 Pistachios



\$1,330 Tomatoes



\$1,240 Walnuts



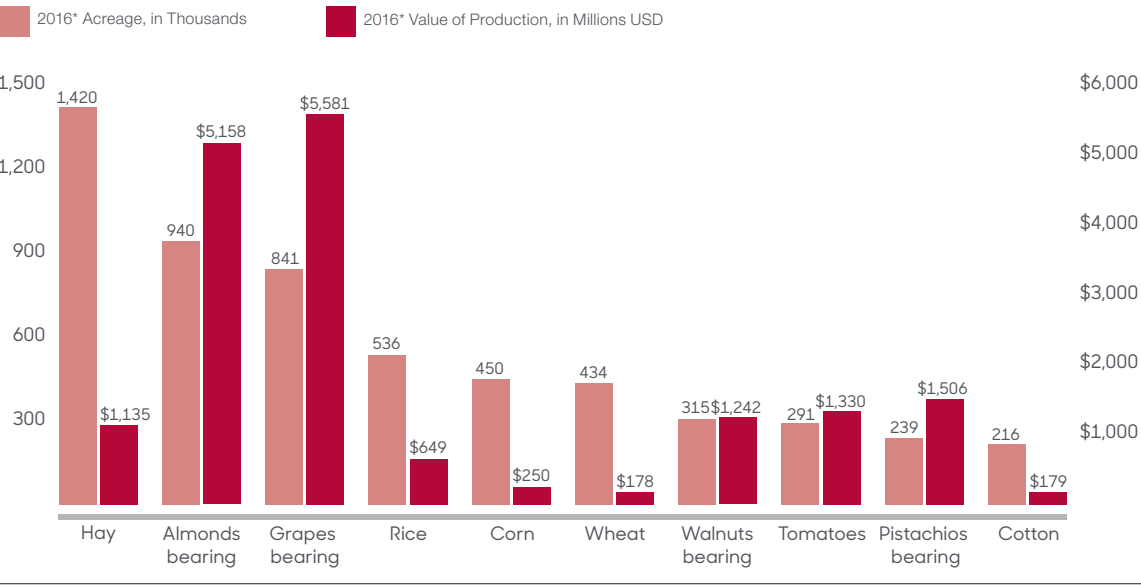
\$801 Poultry

Did You Know?

California's agricultural abundance includes more than 400 commodities. **OVER A THIRD OF THE COUNTRY'S VEGETABLES AND TWO-THIRDS OF THE COUNTRY'S FRUITS AND NUTS** are grown in California.

Source: California Department of Food and Ag/Statistics.
<https://www.cdfa.ca.gov/Statistics>.

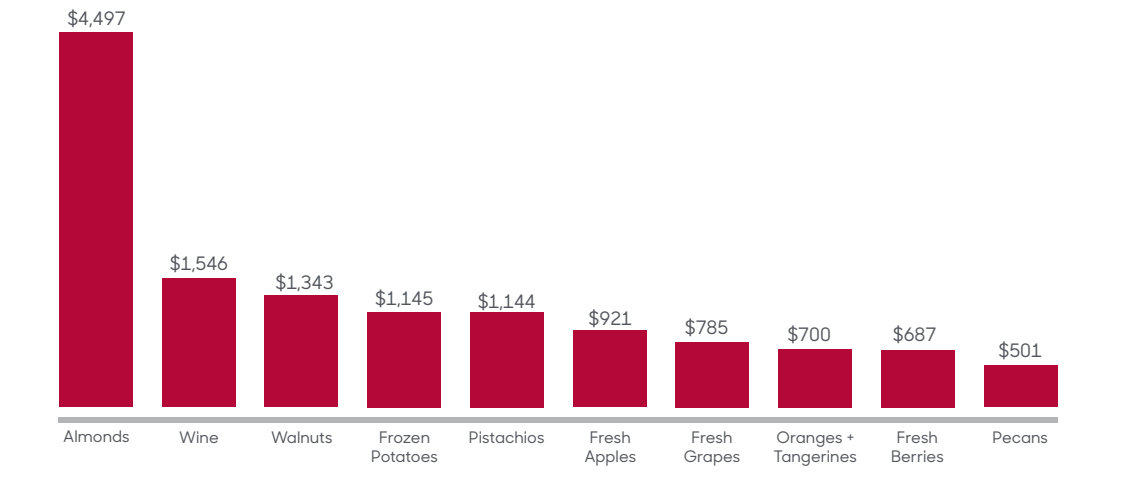
Top Ten California Crop Acreage



Source: USDA, NASS.
*Calendar year January through December 2016. Value based on farm-gate prices.

Top Ten U.S. Specialty Crop Exports by Value

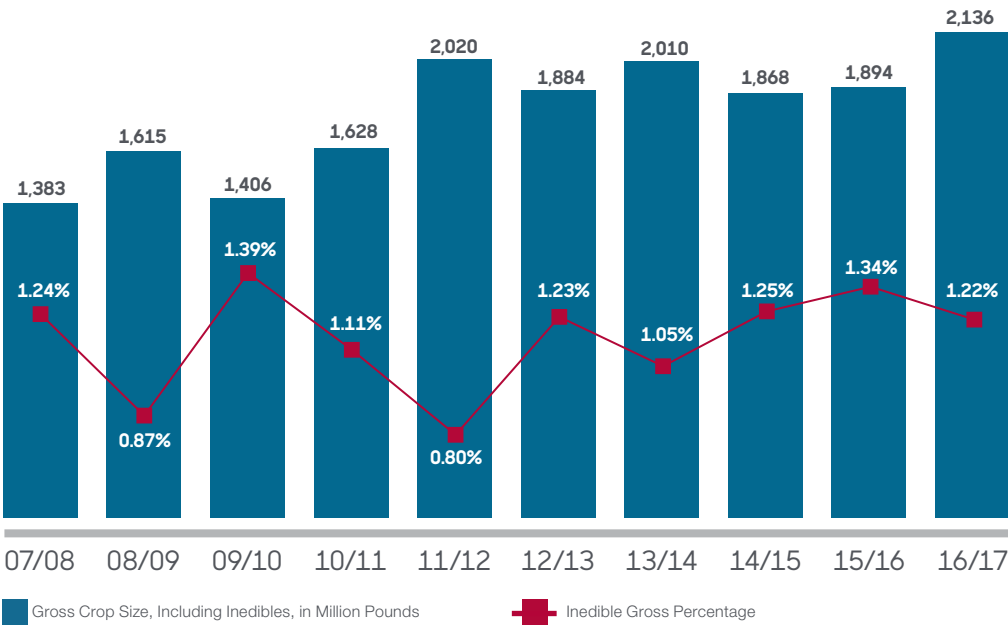
2016* | IN MILLIONS USD



Source: Bureau of the Census, U.S. Department of Commerce, Foreign Trade Statistics.
*Calendar year January through December 2016.

California Almond Crop-Size History + Inedible Percentage

CROP YEARS 2007/08–2016/17



Source: Almond Board of California.



On-Farm Improvements

The percentage of inedible almonds has reduced drastically over the decades. A big reason is research and industry adoption of winter sanitation, a process where almonds left on the tree after harvest are removed, eliminating habitat for crop-damanging pests.



U.S. Tree Nut Category

U.S. Marketable Production and Imports of Competing Nuts

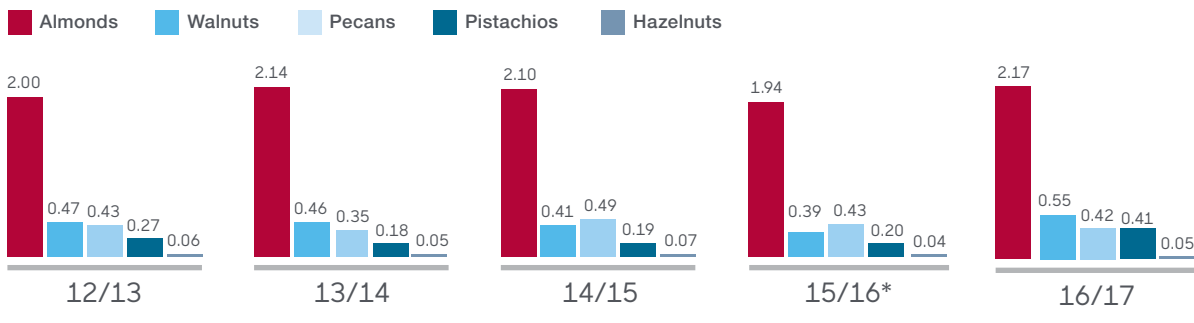
IN MILLION POUNDS (SHELLED BASIS) | CROP YEARS 2007/08–2016/17

| CROP YEAR | ALMONDS | | WALNUTS | | HAZELNUTS | | PECANS | | PISTACHIOS | | OTHER NUTS* | |
|-----------|---------|---------|---------|---------|-----------|---------|--------|---------|------------|---------|-------------|---------|
| | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports | Crop | Imports |
| 2007/08 | 1,383.0 | 7.1 | 280.5 | 8.7 | 29.4 | 13.4 | 180.3 | 79.9 | 207.0 | 0.9 | 16.4 | 378.3 |
| 2008/09 | 1,358.3 | 4.2 | 396.4 | 2.1 | 26.7 | 10.0 | 94.3 | 61.9 | 135.4 | 0.9 | 32.7 | 360.4 |
| 2009/10 | 1,571.9 | 5.6 | 367.9 | 3.4 | 38.1 | 8.0 | 127.5 | 80.1 | 174.8 | 1.3 | 19.1 | 366.4 |
| 2010/11 | 1,379.0 | 8.1 | 441.5 | 0.5 | 21.8 | 11.0 | 140.4 | 82.8 | 250.1 | 0.5 | 18.2 | 379.5 |
| 2011/12 | 1,600.3 | 15.9 | 400.6 | 4.8 | 31.2 | 9.7 | 124.6 | 74.6 | 222.0 | 0.9 | 22.3 | 339.0 |
| 2012/13 | 1,979.9 | 39.4 | 442.1 | 8.4 | 28.4 | 15.2 | 141.0 | 79.3 | 278.3 | 1.2 | 23.1 | 371.9 |
| 2013/14 | 1,848.4 | 33.9 | 437.7 | 11.9 | 36.9 | 14.5 | 130.8 | 92.5 | 234.5 | 0.5 | 18.6 | 425.7 |
| 2014/15 | 1,970.0 | 31.2 | 506.5 | 21.2 | 26.1 | 10.9 | 128.1 | 104.0 | 246.3 | 0.9 | 13.1 | 473.9 |
| 2015/16 | 1,838.6 | 31.8 | 527.0 | 10.8 | 23.3 | 9.2 | 104.5 | 114.8 | 135.0 | 1.2 | 24.0 | 339.5 |
| 2016/17† | 2,135.7 | 26.6 | 604.0 | 15.7 | 35.1 | 11.6 | 128.0 | 134.0 | 446.3 | 1.3 | 23.0 | 504.3 |

Source: USDA, Economic Research Service, *Fruit & Tree Nut Situation and Outlook*. Note: Marketable production is utilized production minus inedibles and noncommercial use.
*Other Nuts includes Brazil nuts, macadamia nuts, pine nuts, chestnuts, cashews and mixed nuts.
†Preliminary.

Domestic Per Capita Consumption of Tree Nuts

IN POUNDS PER CAPITA | CROP YEARS 2012/13–2016/17



Source: USDA, Economic Research Service, *Fruit & Treenut Situation and Outlook*. Almond Board of California.
*2015/16 numbers have been revised by USDA for accuracy.



Doing More Through Collaboration

Almond Board of California and Almond Alliance of California

The challenges for agriculture and the need for a strong voice have never been greater. With so many factions vying for limited resources and regulatory changes, Almond Board of California and the Almond Alliance of California have worked together since 2013 to provide the California Almond industry with expanded opportunities to advocate for industry priorities. As the only two organizations in California established solely to support the almond industry, the Almond Alliance utilizes Almond Board research to support the policy changes they advocate to leaders in California and Washington, DC.

BETTER TOGETHER

Almond Board of California, as a federal marketing order, is prohibited from lobbying, but is able to educate and to provide important research information on a wide range of almond industry issues. Almond Alliance picks up where ABC must leave off, advocating policy changes and providing a strong voice for the industry.

17 REGULATORY COMMENTS SUBMITTED

- Pesticide Reviews
- Food Safety Modernization Act
- Trade Agreements

9 COALITIONS JOINED

- Transportation and Port Delays
- 2018 Farm Bill Programs
- Prop. 65 Listings

8 RECOMMENDATION LETTERS

- 2018 Farm Bill Programs
- Biomass
- Trade and Shipping
- Labeling and Plant-Based Milks

19 BILLS THE ALMOND ALLIANCE TOOK POSITIONS ON

Almond Board Resources



Technical Kit

Provides up-to-date information on almond varieties, almond forms, handling tips and USDA standards and grades



Almond Almanac

Annual year-end report that provides an overview of almond statistics and ABC programs



USDA Almond Grades Poster

An instant look at almond varieties and sizes, almond forms and USDA standards and grades



Growing Good

Overview of almond sustainability, industry programs and initiatives



The Almond Conference

Annual event offers insights and research updates on all aspects of growing, processing and marketing almonds
Save the date: December 4–6, 2018
AlmondConference.com



Research Update + Database

An annual publication featuring one-page summaries of each ag research project underway

Access 40+ years of production and environmental research in the form of reports, summaries and posters
Almonds.com/researchdatabase



Almond Leadership Program

A year-long program covering all facets of the California Almond industry through seminars, tours, special projects and community service events
Almonds.com/almondleadershipprogram.com



Ag in the Classroom

Teaching resources explaining how almonds are grown and processed, the history of California Almonds and the many ways to enjoy the versatile nut
Almonds.com/agintheclassroom



eLearning Courses

Online learning courses covering the Lifecycle of Almonds, selecting the right California Almond for your specific need and accredited CE course on almond production
Almonds.com/elearning



California Almond Sustainability Program

Free online productivity tools and assessment modules to learn about alternative best practices and regulatory requirements
Almonds.com/CASP

Online portal for California Almond Sustainability Program participants
SustainableAlmondGrowing.org



Industry Resource Directory

Connects farmers and processors to various members of the almond industry, from those working in alternative energy solutions and computer software/programming to county agricultural commissioners and insurance specialists
Almonds.com/resourcedirectory



Blog

Sharing regular posts about almond sustainability, nutrition research and more
Almonds.com/blog



Newsroom

One-stop shop for the latest news published by ABC
Newsroom.Almonds.com



Twitter

Almond news served up in 140 characters
[@almondboard](https://twitter.com/almondboard)



Facebook

A place for almond farmers and processors to stay in touch with ABC
[@AlmondBoardofCalifornia](https://www.facebook.com/AlmondBoardofCalifornia)



YouTube

Hub for all Almond Board-produced videos about almonds, industry education, consumer outreach and more
AlmondBoardofCA



LinkedIn

Learn about various ABC program initiatives and ABC career information
Linkedin.com/company/almond-board-of-california/



Questions? Collateral Requests?
Contact Almond Board of California at:
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209.549.8262



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