



October 9, 2025

Turkey Removes Retaliatory Tariffs

On September 22, the Turkish government announced it was lifting the retaliatory tariffs on several agricultural items, **including almonds**, that had been put in place in 2018. The 10% additional duty was implemented in response to U.S. Section 232 tariffs on Turkish steel and aluminum. Removal of the retaliatory tariff takes the rate for almonds back to **15%**. This is great news, particularly as the Almond Board had identified Turkey as a new market opportunity. Almond exports to Turkey have increased about 2% over last year's shipments; at the end of FY 24/25, it was the 5th largest export destination for California almonds.

Latest Tariff and Trade Updates

Since the end of September:

- Discussions with India seem to be back on, with U.S. negotiators recently back in India.
- USTR announced the start of the public comment period for the US-Mexico-Canada (USMCA) joint review period on September 17.
- China and U.S. leaders are expected to meet during the Asia-Pacific Economic Cooperation (APEC) Summit at the end of October in S. Korea. This announcement followed a phone call between the two leaders on September 19, in which they reportedly discussed trade, fentanyl, and the Tik Tok app.
- Turkey lifts its 2018 retaliatory duties on several ag commodities, including almonds.
- The administration announced plans to impose more duties on trucks, pharmaceuticals and kitchen cabinets/bathroom vanities and similar products, some as soon as October 1.

For more information, please contact Keith at kschneller@almondboard.com and Lindsay at ltello@almondboard.com.

Saudi Requirement to use Pallets

USDA/FAS in Riyadh has advised that the Saudi Arabia General Authority of Ports is intending to require the use of pallets for all containerized cargo

shipments to the Kingdom's ports. The implementation period began on June 1, and will last for one year, followed by mandatory compliance. It appears "super sacks" are exempt from the requirement.

The change in requirements is to facilitate "*handling and unloading operations from containers, which in turn contributes to reducing the release time of goods, in addition to reducing the risks that goods are exposed to during the shipping, handling, and unloading process, such as loss or damage.*" The notification further refers to preserving the safety of employees and workers in the ports, and to enhancing inspection efficiency.

If you are hearing this from your customers or anticipate issues, please let ABC staff know, so we can monitor the situation.

Phyto Not Required for Almonds to Norway

Several shippers contacted ABC recently about a notice from Norwegian Food Safety authorities regarding phytos for almonds. We believe this was due to Norwegian authorities citing a regulation that specifies requirements for *Prunus L.* – they were confusing this with *Prunus Dulcis* (almonds), which is not the same. It has been clarified with USDA/APHIS and Norway that almonds are **unrestricted – no phyto is required.** If you have any problems, please reach out to Julie at jadams@almondboard.com.

Almond Export Diversification

Recent meetings in Washington, DC provided an opportunity to discuss shipments of almonds, and how export destinations have evolved over the past 20 years. In 2015, exports represented about 64% of total shipments, with the top 10 markets representing 74% of exports. Ten years later, increasing shipments to India and China led the way to Asia becoming a more significant destination. With retaliatory tariffs in 2018, China shipments declined, with India taking a larger position. In 2025, exports rose to 75% of shipments and China is no longer a top export destination. An important distinction is that the top 10 export markets now represent about 70% of total exports – less reliance on a few markets, as

we see demand growth in countries around the world, including in North Africa and the Middle East. With current trade uncertainty and tensions, having a diverse market portfolio is essential, which the California almond industry has been able to do, mitigating many of the market disruptions.

China Investigation on Pecans

The China Ministry of Commerce (MOFCOM) announced an anti-dumping investigation on pecans from Mexico and the U.S., starting September 25, 2025. This seems to be in response to Mexico's plans to raise import tariffs on about 1,400 items from a range of countries, including China. At this point, we do not have any additional information, but staff is continuing to monitor this situation, and whether China decides to initiate other commodity investigations.

Almond Conference December 10-12

Plans are moving forward for the 2025 annual conference, *Cultivating a Healthier Future*. The three days are packed with a full tradeshow floor, grower information, research updates, and several trade and logistics focused sessions, including:

- **Global Trade – Keep your Seatbelts Fastened!** USTR and industry experts have been invited to speak about what is shaping the current trade environment.
- **Exporting with Confidence.** An overview of the tools, programs and strategies to assist with meeting export market requirements.
- **Transportation & Logistics: Getting from Handler to Market.** Explore logistics challenges and opportunities, including developments at Port of Oakland.

This year the conference is Wednesday to Friday. Be sure to register – see you in Sacramento!

Supreme Court to hear Tariff Suit

On November 5, the Supreme Court will hold oral arguments in the legal challenges to tariffs under the International Emergency Economic Powers Act (IEEPA). The case will determine if IEEPA can be used as the basis for sweeping reciprocal tariffs.

Challenges focus on the view that the administration's interpretation goes beyond what Congress intended and potentially violates constitutional limits on executive power.

ABC Staff Update

As Keith Schneller prepares to retire, we are happy to introduce Lindsay Tello who has joined the GTRA team! Lindsay was previously with the U.S. Department of State and the USDA/Foreign Ag Service; she will bring considerable experience with trade policy and market access issues. Lindsay will be working closely with Keith as we transition responsibilities. But do not fear! Keith will continue to cover a number of projects, including handler registrations under China Decree 248. Lindsay can be reached at ltello@almondboard.com; you will also have a chance to meet her in Sacramento at the Almond Conference in December!

Upcoming Events & GTRA Activities

Sept 30-Oct 1	FRUCOM annual meeting
Oct 14-15	GTRA/GMD ABC Leadership event
Nov 1-7	Ag Cooperator Trip to China/ CIIE Show
Nov 4-8	ABC/USDA in Japan to meet with MHLW
Nov 18-20	USAEDC Conference in Baltimore
Dec 10-12	The Almond Conference in Sacramento

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The Global Update is a publication by the Almond Board of California. For more information, please contact the Almond Board on 209-549-8262 or regulatoryissues@almondboard.com. The information reported in this document is correct to the best of our knowledge. The Almond Board of California welcomes the participation of all industry members and does not discriminate on the basis of race, color, national origin, sexual orientation, gender, marital status, religion, age, disability or political beliefs.

Government Shutdown...ABC is closely following the situation, and its impact on almond industry activities. USDA fee-based services (phytos, inspections) are continuing to operate. Many of these services are also contracted to local authorities (e.g. CDFA Shipping Point Inspection, County Ag Commissioners). Depending on the length of the shutdown, local USDA offices may be open, but not all services offered. Overseas, the USDA/FAS foreign office should still be available to support you. Please keep ABC apprised if you need any assistance.