



THE ALMOND ALMANAC

ABOUT THE ALMOND BOARD

BOARD OF DIRECTORS, COMMITTEES

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DOWNLOAD YOUR LATEST

RESOURCES

PAGE 8

FACTS AND FIGURES

GET ALL OF THE NEWEST DATA

STARTING ON PAGE 10

READ ABOUT ABC'S GLOBAL WORK

MARKET SPOTLIGHTS

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CONGRATULATIONS CLASS OF



Arik Bains, Cristal Da Silveira, Katie Driver, Raquel Gomez, Zach Harcksen, Evan Koftinow, Laine LaGrande, Brenden Lusk, Joseph McManus, Luis Mendoza, Rajan Nagra, Crystal Nay, Ricky Robledo, Kiki Sandrini, Ranvir Tung, Elizabeth Vander Weide, Jake Wiley, Bobbie Williams

Established in 2009, the Almond Leadership Program (ALP) is a yearlong initiative created to **inspire and empower** members of the almond community with the skills needed to lead a dynamic industry. Since its inception, the program has graduated more than 250 participants, with more than 80 who've gone on to serve on Almond Board of California committees or hold positions on the Board of Directors. Demonstrating its commitment to cultivating future agricultural leaders, ALP has contributed more than **\$350,000** to 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, #2 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.

ALMOND BOARD OF CALIFORNIA

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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.

ABOUT

THE ALMOND BOARD OF CALIFORNIA

The Almond Board of California was formed as a federal marketing order 75 years ago in 1950. Today, it promotes California almonds globally, ensures food safety and supports research.

The Almond Board programs are funded by a per-pound assessment on all California-grown almonds. Working with Board-approved committees, the Board of Directors directs funds and initiatives in each program area.

HOW THE BOARD WORKS

The Board of Directors consists of ten volunteer members—five handlers and five grower representatives—elected annually by independent almond growers and handlers as outlined in the federal marketing order. For each Board member, there is an alternate member.

The Board is responsible for establishing policy, recommending budgets and programs to the Secretary of Agriculture for approval and reviewing program results and effectiveness. These programs are overseen by Board-approved committees and administered by the Almond Board staff.

BOARD OF DIRECTORS



Board: Paul Ewing, Brandon Rebiero, Joe Gardiner, Chad DeRose, Bob Silveira (Chair), Darren Rigg, George Goshgarian Jr., Christine Gempferle, Maya Erwin, Alicia Rockwell (Vice Chair)

Alternates: Tobin Barth, Brad Klump, Garrett Bloemhof, Ron Fisher, Justin Morehead, Dinesh Bajaj, Cathy Marsh, Lucas Van Duyn, Mel Machado, Frances Dillon

Photo taken August 2025.

DID YOU
KNOW?

EVERY FIVE YEARS, THE USDA HOLDS A REFERENDUM TO CONTINUE THE MARKETING ORDER. IN DECEMBER 2024, 90.5% OF VOTING GROWERS—REPRESENTING 93.3% OF ALMOND VOLUME—SUPPORTED ITS CONTINUATION.



GETTING INVOLVED

IN ADDITION TO THE BOARD OF DIRECTORS, NEARLY 200 ACTIVE ALMOND INDUSTRY MEMBERS SERVE ON COMMITTEES AND WORKGROUPS TO FURTHER THE WORK OF THE ALMOND BOARD. VOLUNTEERING WITH THE ALMOND BOARD HELPS ENSURE ALMONDS REMAIN AN ESSENTIAL CROP IN CALIFORNIA AND ARE DEMANDED BY CONSUMERS AROUND THE WORLD.



ATTEND A MEETING

ANY INDUSTRY MEMBER IS WELCOME AND ENCOURAGED TO ATTEND COMMITTEE AND BOARD MEETINGS. USE QR TO SEE CALENDAR OF EVENTS.



JOIN A COMMITTEE

APPLICATIONS ARE ACCEPTED YEAR-ROUND, WITH NEW APPOINTMENTS IN AUGUST. USE QR TO APPLY NOW.

COMMITTEE STRUCTURE



Additional groups for industry members to participate in include the Biomass workgroup, Environmental Stewardship workgroup, Production Stewardship workgroup and Organic Advisory Panel.

STRATEGIC PRIORITIES

IN JUNE 2024, THE ALMOND BOARD OF CALIFORNIA ADOPTED A NEW STRATEGIC PLAN TO GUIDE FUTURE INDUSTRY GROWTH. PROGRAMS HAVE BEEN ADJUSTED ACCORDINGLY, WITH MORE CHANGES PLANNED TO SUPPORT THE ALMOND BOARD’S FOUR STRATEGIC PILLARS:

- 1

DRIVE GLOBAL DEMAND FOR CALIFORNIA ALMONDS:

Drive value by investing in programs and research that meaningfully differentiate almonds across short- and long-term horizons.
- 2

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.
- 3

MAXIMIZE INDUSTRY EFFICIENCY:

Provide industry members with information and resources that outline options available to maximize efficiency, profitability and overall value for their operations.
- 4

OPTIMIZE ALMOND BOARD VALUE:

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

STRATEGIC PRIORITIES ARE REVIEWED BY THE BOARD OF DIRECTORS EVERY TWO YEARS, WITH THE NEXT EVALUATION SET FOR 2026.

**DID YOU
KNOW?**

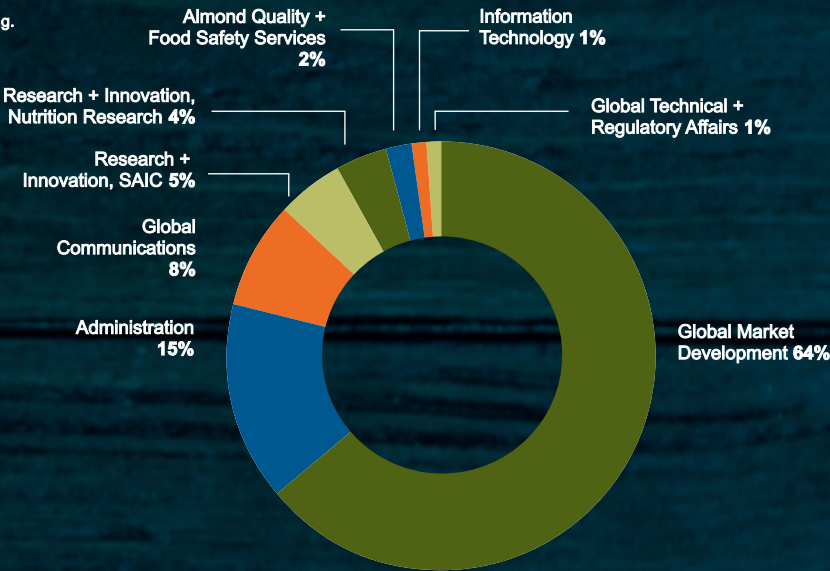
AS A FEDERAL MARKETING ORDER, THE ALMOND BOARD IS NOT INVOLVED WITH, AND IS EXPRESSLY PROHIBITED FROM, SETTING MARKET PRICES AND LOBBYING.

PROGRAMS + BUDGET

PROGRAM BUDGET ALLOCATION

crop year 2024/25*

*Totals may not add precisely due to rounding.



ALMOND BOARD OF CALIFORNIA PROGRAMS ARE SUPPORTED BY A PER-POUND ASSESSMENT APPLIED TO ALL CALIFORNIA-GROWN ALMONDS, WITH OVERSIGHT PROVIDED BY THE BOARD OF DIRECTORS AND COMMITTEES. Administration is managed by staff, ensuring that each initiative aligns with the Almond Board’s strategic priorities. Examples of ABC work include:

DRIVING GLOBAL DEMAND

- ABC has increased its investment in India by 70% over the past five years and will launch an exciting new consumer campaign in early 2026. The campaign is designed to drive growth in whole kernel usage.
- Did you know that 50% of almonds are used as an ingredient? Over the past three years, ABC has increased marketing investment to food professionals by 61% to support this important category. A good portion of this investment has supported ingredient programs in India, the U.S. and Germany.
- ABC officially launched activities in two new markets: Morocco and Turkey.
- Nutrition research funding is focused on evolving consumer priorities and incorporating novel scientific technologies to leverage the extensive amount of existing almond research.

SUPPORTING A FAVORABLE TRADE + REGULATORY ENVIRONMENT

- ABC secured over \$13 million from the newly established Regional Agricultural Promotion Program (RAPP). One example of how this funding is being used is through market assessments in emerging markets. In fiscal year 2024/2025, ABC conducted assessments in Turkey, North Africa, Indonesia and Brazil.

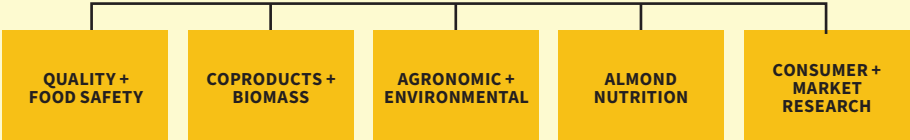
MAXIMIZING INDUSTRY VALUE

- A Forecast Task Force, in conjunction with the AQFSS committee, evaluated the future of the crop estimates and reports.

ADDITIONAL PROGRAM UPDATES CAN BE FOUND THROUGHOUT THE ALMANAC.

DATA DRIVEN

ABC SUPPORTS
RESEARCH ACROSS
FIVE KEY AREAS TO
DRIVE DEMAND,
OPTIMIZE TRADE
AND REGULATORY
CONDITIONS
AND INCREASE
FARM RETURNS.



THE ALMOND BOARD – FUNDED RESEARCH IS THE FOUNDATION TO DRIVE GLOBAL DEMAND

From audience insights and the impact of almonds on human health to the industry’s strong environmental stewardship story, data on the benefits of almonds is key to driving global demand.

SPOTLIGHT ON

NUTRITION RESEARCH

As consumer priorities evolve, the Almond Board of California has reshaped its approach to nutrition research by incorporating innovative technologies and engaging new audiences to showcase almonds’ benefits.

RESEARCH HIGHLIGHTS

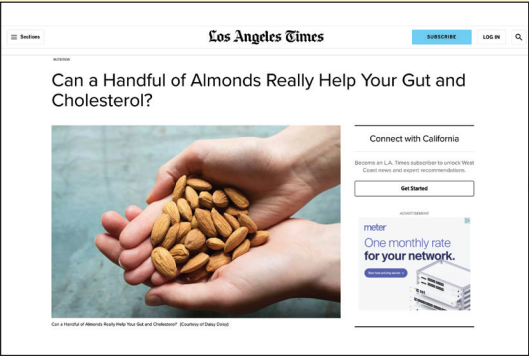
We embarked on a new research **partnership with Brightseed**, which harnessed novel **AI tools to identify 530 health-promoting compounds in almonds**, four times more than previously known. These newly identified compounds are associated with benefits to brain, gut, metabolic, cellular and immune health, underscoring almonds’ powerful nutrition and health benefits.

In a new peer-reviewed publication, a group of world-leading health and nutrition experts critically analyzed 30 years of research and came to an expert consensus that eating almonds daily is an evidence-based strategy to **improve cardiometabolic health**. This expert endorsement of specific almond benefits elevates the almond research and is important when communicating with influential decision-makers and stakeholders in policy, medicine and academia.



THE ALMOND BOARD’S NUTRITION RESEARCH PROGRAM CELEBRATES 30 YEARS! AS A RESULT OF THIS PROGRAM, ALMONDS ARE NOW RECOGNIZED AS ONE OF THE MOST-RESEARCHED FOODS GLOBALLY, AND HEALTH IS THE TOP REASON PEOPLE REACH FOR ALMONDS.

Source: The Almond Board of California 2024 Global Perceptions Study.

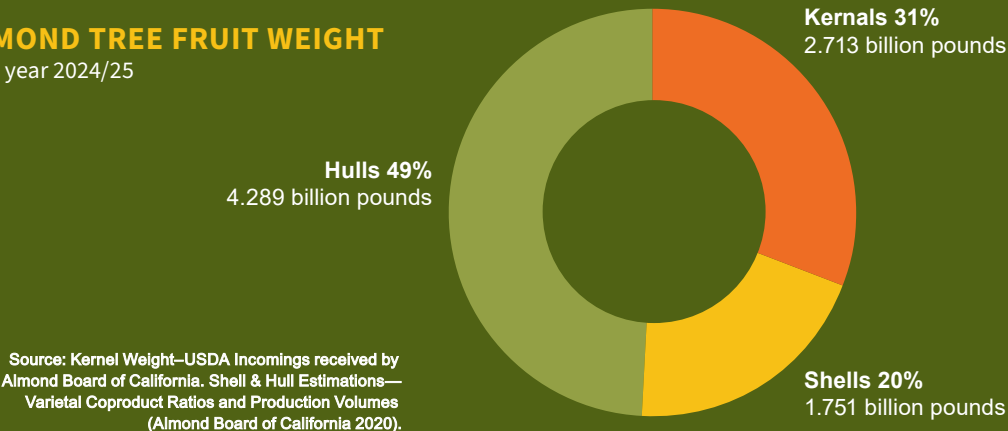


CONSUMERS AND FOOD MANUFACTURERS CARE HOW FOOD IS GROWN

Almonds are a unique food because we use everything we grow—the kernel, shell, hull and tree—with a key research area focused on creating even higher-value uses. Projects include the development of sustainable clothing fabrics using almond wood; the use of shells in low-carbon concrete, compostable and biobased plastics, water quality treatment and biofuel production; and the utilization of hulls for precision fermentation of food-grade ingredients, as well as their direct application as a plant-based food ingredient.

ALMOND TREE FRUIT WEIGHT

crop year 2024/25



HELPING ADDRESS ON-FARM CHALLENGES

As the industry has evolved, Almond Board research has evolved, too. Grower research is consistently evaluated through the Strategic Ag Innovation committee and Production Stewardship workgroup to ensure this research meets the needs of the industry today, with the Global Communications committee playing a key role in translating research findings into practical grower tools.

ALMOND BOARD–FUNDED RESEARCH

FOCUS AREAS:

- Field evaluation of rootstocks and new varieties to help growers make informed choices
- Control of emerging pests and diseases along with more effective and economical tools for persistent pests
- Tools for more precise and efficient irrigation and nutrient management to reduce costs and improve yields
- Management of soil quality from compaction to nutrient cycling
- Harvest efficiency
- Honey bee health

RESEARCH HIGHLIGHTS:

- Developed pheromones for leaffooted plant bugs, technology now commercially available in traps from several companies, to enable monitoring for this growing pest problem
- Enhanced soil quality, pollinator health and biodiversity via the use of cover crops
- Significantly increased nitrogen-use efficiency by moving from episodic to continuum fertigation
- Transitioned to superior rootstocks to boost yields over the lifespan of the orchard and reduced input costs
- Early-season yield prediction tools will be available in the next year to assist growers in making informed input and resource decisions

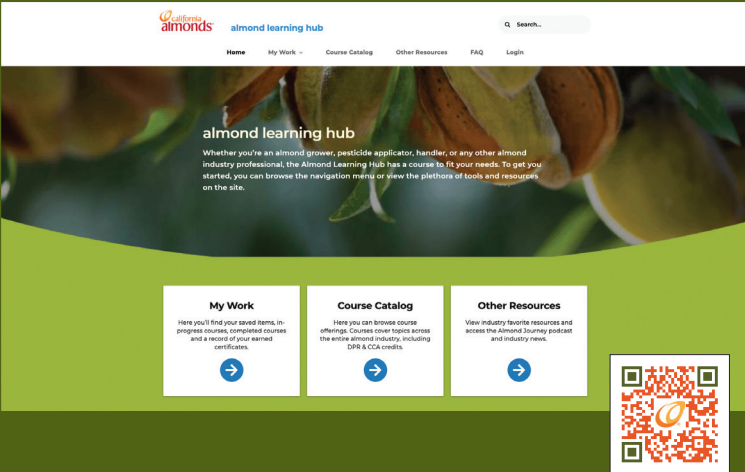
INDUSTRY RESOURCES

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.

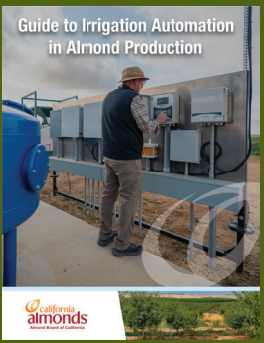
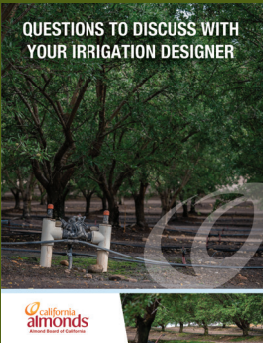
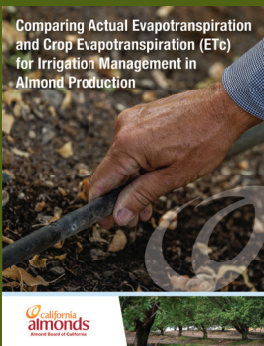
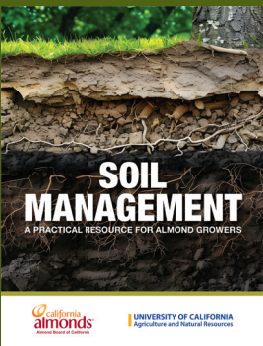
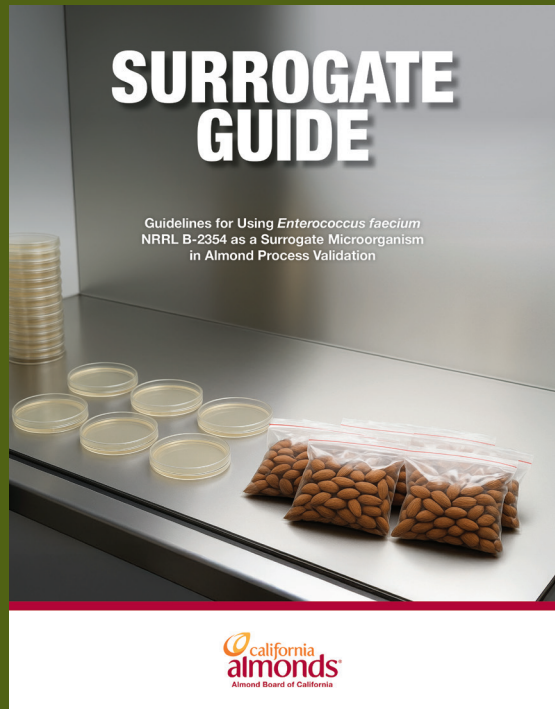
ALMOND LEARNING HUB

The Almond Learning Hub is a free online resource, now offering more than 125 continuing education units for almond growers, pesticide applicators, handlers or any other almond industry professional.

ALMONDLEARNINGHUB.COM



NEW COMPLIMENTARY RESOURCES



Additional resources are available to help almond growers and handlers in their operations.

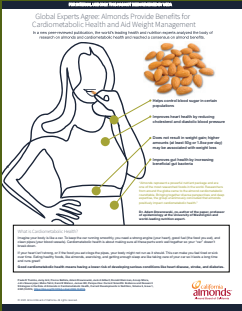
REQUEST YOUR COMPLIMENTARY MATERIALS TODAY

STAKEHOLDER RESOURCES

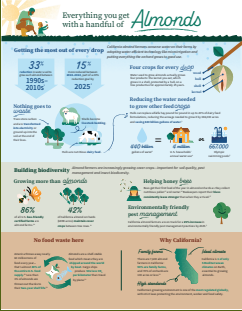
The Almond Board of California has developed a comprehensive suite of free resources designed to inform and engage our many different stakeholders on the benefits of California almonds.



HEALTH



CARDIOMETABOLIC



ENVIRONMENTAL STEWARDSHIP



CALIFORNIA ADVANTAGE

AG IN THE CLASSROOM

The Almond Board is committed to providing factual information to children across the state about what it takes to grow and process almonds. Through Ag in the Classroom, a non-profit dedicated to increasing awareness and understanding of California agriculture, the Almond Board developed educational resources explaining how almonds grow, the history of California almonds and the many ways to enjoy them. Complimentary resources are available.




VISIT AG IN THE CLASSROOM

ABC Staff presents at annual Ag in the Classroom event at Sierra View Elementary School in Oakdale, CA.

WORLD DESTINATIONS

crop year 2024/25 | million pounds

		DESTINATION	2020/21	2021/22	2022/23	2023/24	2024/25
AMERICAS							
NORTH AMERICA		Canada	62.93	62.89	58.13	59.90	60.31
		Mexico	30.21	29.19	30.07	31.14	33.50
		TOTAL NORTH AMERICA	93.25	92.15	88.26	91.14	93.89
LATIN AMERICA/ CARIBBEAN		Argentina	3.29	2.33	1.82	1.35	3.62
		Brazil	7.92	4.71	6.61	6.02	6.18
		Chile	11.89	10.67	7.02	7.21	10.96
		Colombia	7.04	7.38	5.82	7.38	8.22
		Costa Rica	1.31	1.44	1.03	0.95	1.66
		Dominican Republic	0.55	0.54	0.76	0.60	0.52
		Honduras	0.24	0.36	0.66	0.82	0.81
		Peru	4.95	2.51	4.94	4.46	6.65
		Trinidad	0.82	0.93	0.72	0.63	0.86
		TOTAL LATIN AMERICA/CARIBBEAN	39.22	31.29	30.93	30.99	40.67
		TOTAL AMERICAS	132.47	123.44	119.20	122.13	134.55
ASIA-PACIFIC							
NORTHEAST ASIA		China/Hong Kong	162.35	127.30	143.38	106.00	50.81
		Japan	92.02	95.06	87.28	86.46	91.13
		South Korea	76.68	65.41	57.13	59.51	61.45
		Taiwan	13.75	10.79	12.79	10.27	12.97
		TOTAL NORTHEAST ASIA	344.80	298.57	300.59	262.30	216.37
SOUTHEAST ASIA		Indonesia	5.38	6.72	5.90	8.36	7.28
		Malaysia	10.42	8.30	7.14	6.96	10.12
		Philippines	1.10	1.34	1.42	2.00	1.79
		Singapore	5.34	4.76	5.28	4.62	7.68
		Thailand	9.46	10.98	12.31	15.88	15.92
		Vietnam	34.02	27.39	27.11	42.38	57.53
		TOTAL SOUTHEAST ASIA	65.77	59.55	59.19	80.23	100.34
SOUTH/CENTRAL ASIA		Bangladesh	2.92	1.47	1.23	0.88	2.24
		India	362.07	352.67	331.08	400.19	423.06
		Kazakhstan	10.95	5.40	8.20	2.62	3.48
		Nepal	1.80	1.09	1.16	0.60	0.78
		Pakistan	11.44	9.54	6.08	4.51	7.49
		TOTAL SOUTH/CENTRAL ASIA	391.80	375.00	354.43	409.57	437.06
AUSTRALASIA/OCEANIA		Australia	2.60	2.56	1.16	0.61	0.68
		New Zealand	4.73	2.83	2.87	2.91	2.99
		TOTAL AUSTRALASIA/OCEANIA	7.34	5.39	4.03	3.53	3.70
		TOTAL ASIA-PACIFIC	809.70	738.50	718.24	755.62	757.47
EUROPE							
WESTERN EUROPE		Belgium	23.30	23.27	16.21	16.94	18.80
		Denmark	8.61	10.55	8.66	10.69	11.03
		France	34.85	21.90	26.42	25.45	25.03
		Germany	157.11	119.13	114.95	107.22	101.74
		Greece	17.13	12.94	12.16	11.29	9.21
		Ireland	0.78	0.78	0.47	0.48	0.70
		Italy	96.79	83.60	83.68	86.89	98.07
		Netherlands	93.64	103.55	87.59	107.63	128.70
		Norway	7.03	5.00	4.25	5.14	5.71
		Portugal	1.48	1.31	0.88	0.62	0.62
		Spain	238.94	226.99	193.79	188.49	166.79
		Sweden	6.22	6.32	5.41	4.55	7.03
		Switzerland	1.94	2.69	2.78	2.45	2.78
		United Kingdom	41.47	27.63	26.43	32.77	33.84
		TOTAL WESTERN EUROPE	729.92	646.16	583.32	601.58	610.38
CENTRAL/ EASTERN EUROPE		Belarus	0.18	0.31	0.53	1.28	1.23
		Bulgaria	2.19	2.10	2.74	3.09	2.47
		Croatia	5.70	3.24	3.11	4.70	2.99
		Czech Republic	2.04	1.06	1.49	1.27	1.06
		Estonia	19.41	11.58	14.86	4.09	2.90
		Georgia	2.85	1.93	5.42	2.31	1.75
		Latvia	2.12	2.74	1.98	3.15	5.06
		Lithuania	9.34	6.36	7.03	8.31	11.47
		Montenegro	0.13	0.18	0.26	0.31	0.53
		Poland	7.34	5.52	6.19	7.27	5.96
		Romania	0.69	0.67	1.51	1.47	1.04
		Serbia	0.70	0.31	0.48	0.88	0.61
		Ukraine	7.29	2.98	0.35	0.53	1.28
		TOTAL CENTRAL/EASTERN EUROPE	62.03	40.61	49.69	40.47	40.27
		TOTAL EUROPE	791.95	686.77	633.51	642.05	650.65
MIDDLE EAST/AFRICA							
MIDDLE EAST		Bahrain	1.47	1.33	1.30	1.48	1.32
		Cyprus	1.22	0.97	1.19	1.06	1.12
		Iraq	1.22	1.22	0.67	3.43	5.79
		Israel	15.65	13.02	12.31	7.68	8.56
		Jordan	12.79	14.80	21.57	11.23	17.17
		Kuwait	3.70	3.76	4.21	4.40	4.73
		Lebanon	3.82	3.14	4.82	8.97	8.01
		Oman	0.70	0.49	0.60	1.52	1.26
		Qatar	1.84	1.50	1.62	1.66	2.11
		Saudi Arabia	23.07	19.14	24.82	24.07	29.90
		Turkey	66.70	67.31	77.89	100.43	107.71
		United Arab Emirates	122.62	122.58	121.17	158.48	153.04
		TOTAL MIDDLE EAST	254.80	249.25	272.16	324.43	340.71
NORTH AFRICA		Algeria	8.48	10.10	15.87	16.98	14.50
		Egypt	8.97	4.16	3.39	1.14	3.30
		Libya	8.79	5.90	12.36	14.24	9.14
		Morocco	65.86	40.21	63.04	77.68	58.64
		TOTAL NORTH AFRICA	93.29	60.62	94.84	110.31	86.02
SUB-SAHARAN AFRICA		South Africa	7.45	9.77	10.07	9.05	5.38
		TOTAL SUB-SAHARAN AFRICA	7.83	10.22	10.31	9.38	5.69
		TOTAL MIDDLE EAST/AFRICA	355.92	320.10	377.31	444.12	432.42
 Total Shipments		TOTAL EXPORT SHIPMENTS:	2,090.05	1,868.81	1,848.26	1,963.92	1,975.09
		TOTAL USA SHIPMENTS:	808.08	764.64	716.36	728.06	671.36
		TOTAL GLOBAL SHIPMENTS:	2,898.13	2,633.45	2,564.61	2,691.98	2,646.45

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 2024/25 are listed.



INDIA

FUELING AN UNSTOPPABLE SPIRIT—ONE ALMOND AT A TIME!

INDIA REMAINS THE LARGEST EXPORT MARKET FOR CALIFORNIA ALMONDS, with 423 million pounds shipped in crop year 2024/25 and an impressive 11% compound annual growth rate over the last five years. Domestic per capita almond consumption, at only 0.46 pounds per person, continues to show room for increased consumption.

ABC EXPANDS ITS REACH IN INDIA!

In the last year, the Almond Board of California expanded efforts to grow almond awareness and demand across India. California almonds are now woven into the fabric of everyday life in India—appearing on screens, in stadiums and across urban landscapes—as a symbol of strength, vitality and wellness.



After lifting weights, lift one almond and eat it.



BOLLYWOOD STAR POWER FUELS ALMOND LOVE

In 2025, the Almond Board partnered with Bollywood star **Ananya Panday** to promote almond consumption in India. Through her active social media presence, Ananya highlighted how almonds support her busy lifestyle and encouraged her large following to consume almonds for sustained energy and to support beauty, balance and vitality from within.

CRICKET MEETS NUTRITION

The Almond Board strengthened its presence in India by collaborating with renowned cricket star **Rishabh Pant** in a new social media campaign. Through engaging posts and videos, Rishabh demonstrated how California almonds serve as an optimal snack for pre- and post-workout routines, amplifying ABC’s message that California almonds are the smart choice for sustained energy and recovery.



POWERING UP THE IPL SEASON

ABC also promoted California almonds as the premier energy snack during the latest Indian Premier League cricket season. The campaign featured a first-ever partnership with **Spotify India**, featuring dynamic commentary segments connecting almonds to stamina and athletic performance. Complementary films on **JioCinema** reinforced messages like “Fuel Your Winning Moments” and “Recover with Almond Energy,” while outdoor advertising ensured widespread visibility among cricket fans throughout the season.

The U.S. is an incredibly important market representing 25% share of shipments. India remains the #1 export destination, with shipments exceeding 423 million pounds, an increase of 6% from 2023/24.

TOP 10 GLOBAL DESTINATIONS FOR CALIFORNIA ALMONDS

crop year 2024/25 | million pounds



POSITION REPORT OF CALIFORNIA ALMONDS

crop years 2015/16–2025/26 | million pounds

CROP YEAR	REDETERMINED MARKETABLE WEIGHT	CARRY-IN	RESERVE	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS	TOTAL SHIPMENTS	SALABLE CARRY-OVER
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	2,627.6	502.7	N/A	3,130.3	671.4	1,975.1	2,646.5	483.8
2025/26*	2,940.0	483.8	N/A	3,423.8	699.7	2,099.1	2,798.8	625.0

Source: Almond Board of California. *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: Hannah Ritchie. Very little of global food is transported by air; this greatly reduces the climate benefits of eating local. Published online at OurWorldinData.org. January 2020.

DRIVING GLOBAL DEMAND IN THE UNITED STATES

MARKET PERFORMANCE

The U.S. remains the largest market for California almonds, with 671 million pounds shipped in fiscal year 2024/25. Domestic per capita almond consumption continues to be nearly three times higher than that of any other tree nut, underscoring the popularity of almonds among Americans. However, almonds face challenges, including a decline in the snack category, increased competition within the broader food segment and rising costs influencing purchasing behavior. These factors highlight the importance of having a strategic approach to make almonds an essential choice for both consumers and food manufacturers.

STRATEGIC PARTNERSHIPS

The *Look Good, Feel Good, Snack Good* campaign features a partnership with Deion “Coach Prime” Sanders, now in its third year. This campaign has aired on cable and connected TV outlets such as ESPN, CBS Sports, YouTube and major social platforms. The campaign with Deion Sanders has resulted in more coverage and higher impact stories for California almonds—generating 6x more earned media placements than previous campaigns and a 4x increase in top-tier media coverage.



CALIFORNIA ALMONDS AT SUPER BOWL LX

Coach Prime will be here, representing California almonds at Radio Row leading up to Super Bowl LX at Levi’s Stadium. Look for exciting updates as we make a big splash in our own backyard!

COLLABORATIVE PROMOTIONS

ABC partnered with Smoothie King, the largest smoothie chain in the world, for a first-of-its-kind collaboration to encourage customers to add almonds to their smoothies. The partnership led to a 70% increase in almond sales during a 10-week promotion. Eighty percent of consumers said almonds improved their smoothies, and increased almonds sales have continued after the promotion, demonstrating lasting impact.



DIGITAL RETAIL INITIATIVES

The Almond Board launched a promotion with Amazon in the fall of 2025, aiming to make almonds the *Prime* snack for every occasion. Tactics spanned from college football to Amazon influencers, with online and in-store placements.

ENGAGING GEN Z IN FOODSERVICE

The college and university foodservice sector represents an \$18 billion opportunity. As students are forming new habits, the Almond Board is making sure almonds are on the menu in exciting ways. In April 2025, ABC partnered with UMass to develop a whole new lineup of almond-based dishes designed specifically for college palates. These recipes, along with a toolkit of almond benefits, are now being promoted to campuses all across the U.S.



★ < >

WHY ALMONDS? WHY LIVE?

ALMOND BEST PRACTICES

RECIPES

PROMOTION

RESULTS

RESOURCES

THE EARTH CONSCIOUS SNACK

Almonds aren't just a healthy snack, they're good for the earth, too.

Grown with sustainability in mind, they support...

Almond trees capture and store carbon dioxide, a greenhouse gas, in their wood and roots. The storage accumulates as the tree grows, reducing emissions and promoting forest health.

Carbon footprints for almonds are 24 times lower than almonds grown in the U.S. and 10 times lower than almonds grown in the U.S. and 10 times lower than almonds grown in the U.S.

Almonds that capture their own carbon dioxide are 24 times lower than almonds grown in the U.S. and 10 times lower than almonds grown in the U.S.

SUSTAINABLE SUCCESS

Let's talk reusing, reducing, and recycling. Almonds shells can make soap bedding for livestock. Not to mention, the hulls provide nutritious feed for dairy cows, cutting down on the water needed for other crops.

Resource Mindful

From 1990s-2010s there has been a 13% reduction in water used to grow almonds. 15% more reduced between 2018-2022.

GROWING GOOD

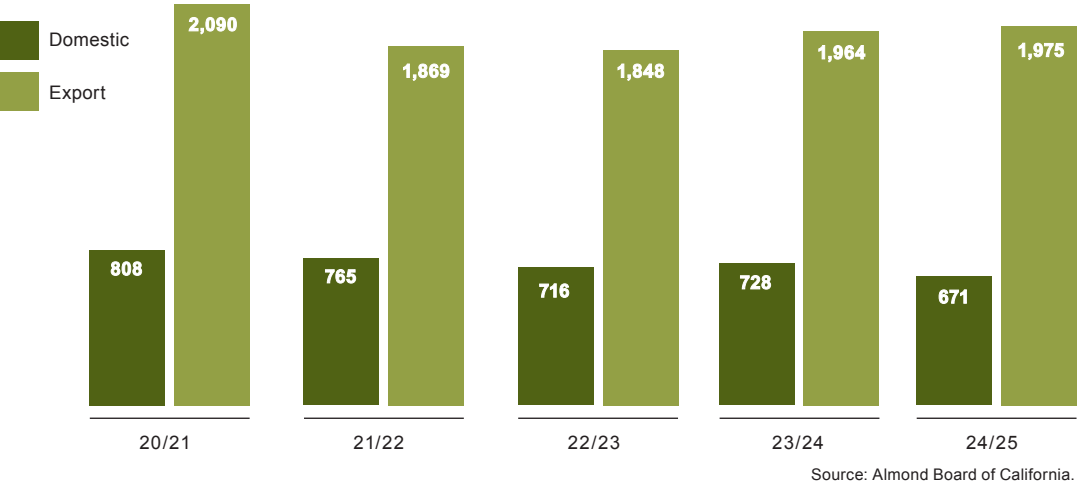
Almonds and bees help each other thrive. Almond blossoms give bees nutritious pollen and nectar, while bees help pollinate over 80 U.S. crops. Today, 80% of bee-friendly certified farms grow almonds. Plus, almond groves are planting cover crops to enrich soil and boost biodiversity.

Simply put, snacking on almonds is a wonderful way to live sustainably.

SHIPMENTS

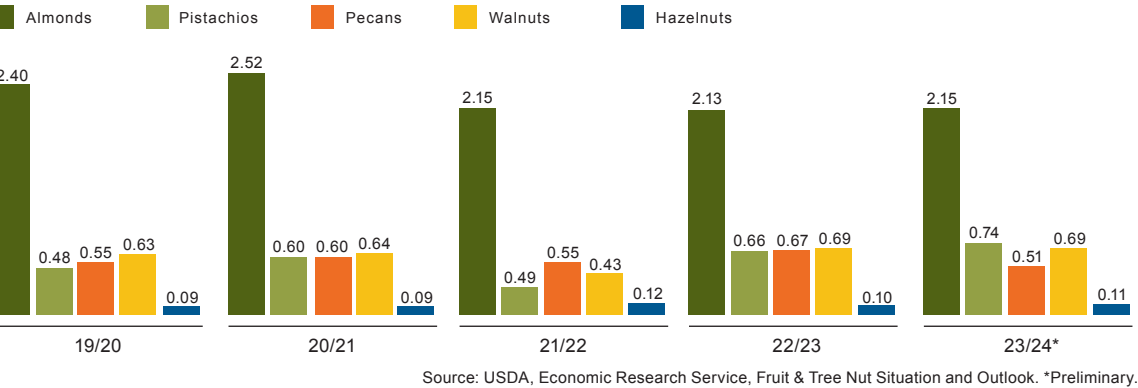
DOMESTIC + EXPORT SHIPMENTS

crop years 2020/21–2024/25 | million pounds



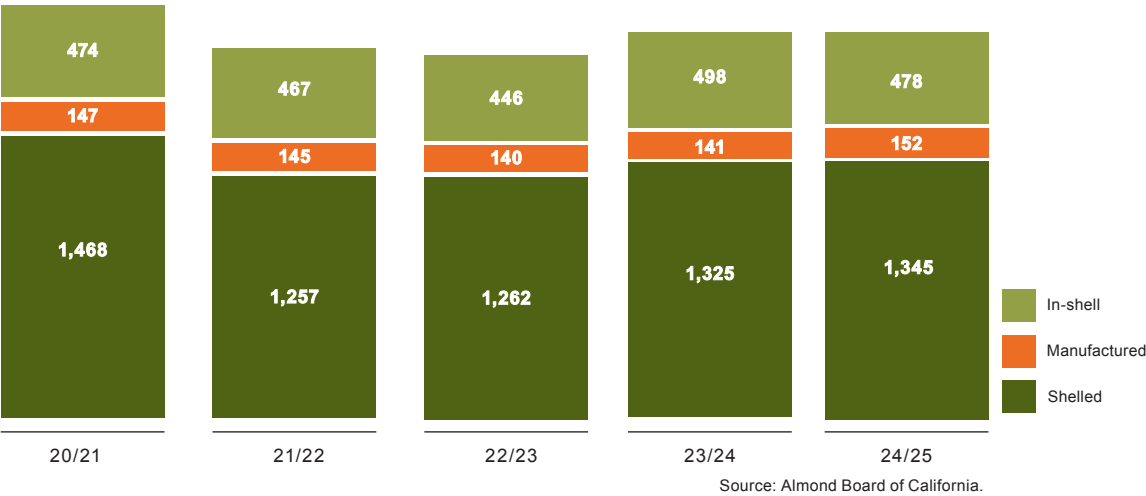
DOMESTIC PER CAPITA CONSUMPTION OF TREE NUTS

crop years 2019/20–2023/24 | pounds per capita



EXPORT SHIPMENTS BY PRODUCT TYPE

crop years 2020/21–2024/25 | million pounds



MARKET ACCESS

ENSURING TRADE STABILITY IS ESSENTIAL FOR CALIFORNIA ALMONDS.

The Global Technical and Regulatory Affairs team remains actively engaged with trade partners and stakeholders to foster constructive solutions that address tariffs and technical barriers while promoting a favorable trade environment.

2025 KEY HIGHLIGHTS

- 100% inspection requirement in Japan eliminated with new pretesting protocol, moving California almonds to random testing
- The India Goods & Services Tax for almonds moved from 12% to 5%, which is consistent with other nuts such as walnuts, cashews and peanuts
- Initiated cooperation with India Ministry of Food Processing Industries to support ingredient usage and food processing opportunities
- Retaliatory tariffs that were implemented in 2018 in Turkey were lifted in September 2025
- Bilateral agreement between the U.S. and EU includes a proposed Tariff Rate Quota for U.S. almonds and other tree nuts with a 0% duty
- Leveraged Regional Agricultural Promotion Program and Emerging Markets Program funding to expand programs in India and complete market assessments in emerging markets: Turkey, North Africa, Indonesia and Brazil
- Identified new contacts to support trade issues through the Almond 101 Workshop at Gulfood and first-ever Morocco Trade Meeting

EDUCATING STAKEHOLDERS AND GOVERNMENT AUTHORITIES ON ISSUES IMPORTANT TO CALIFORNIA ALMONDS IS A FOUNDATIONAL ELEMENT TO BUILDING GLOBAL DEMAND.



Almond Board delegation in Washington, D.C. brings almond issues to the forefront of discussions.

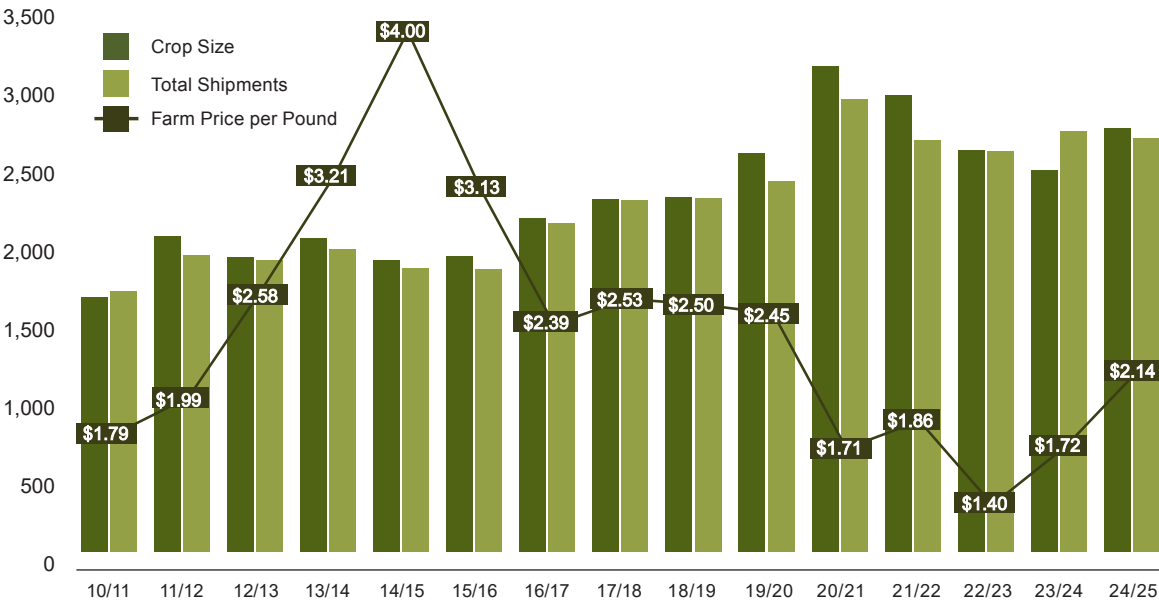


Global trade and U.S. government officials visit Almond Board booth at Gulfood.

CROP + SHIPMENTS

HISTORICAL CROP SIZE + SHIPMENTS VS. FARM PRICE

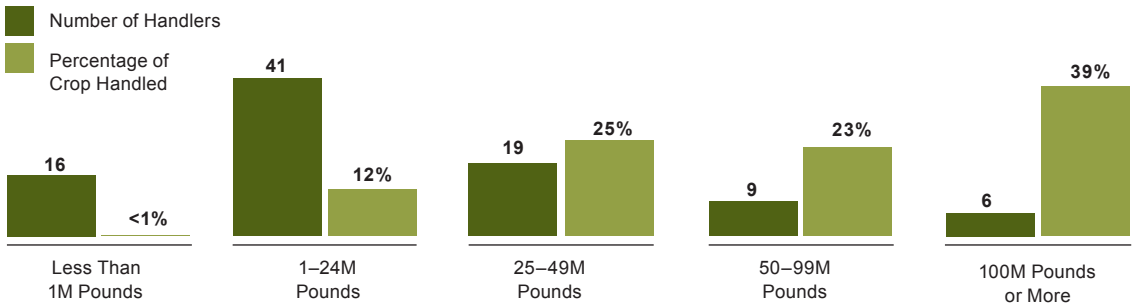
crop years 2010/11–2024/25 | million pounds



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

DISTRIBUTION OF CROP BY HANDLER SIZE

crop year 2024/25



Source: Almond Board of California.

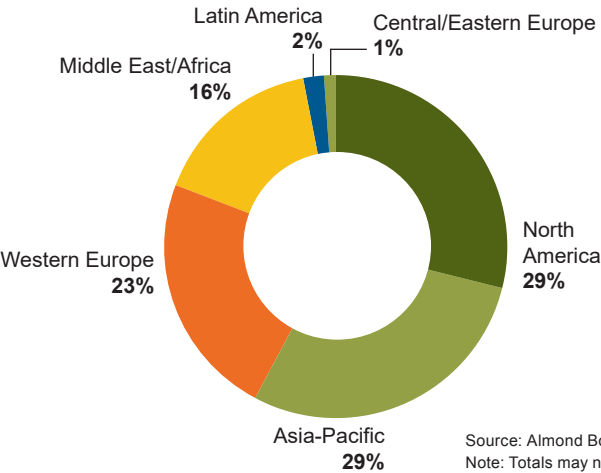
PROCESSING ALMONDS

91 ALMOND HANDLERS

PROCESS CALIFORNIA ALMONDS.
MANY OF THESE OPERATIONS ARE FAMILY OWNED.

SHIPMENTS BY REGION

crop year 2024/25



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



U.S. PRODUCTION + IMPORTS OF COMPETING NUTS

crop years 2014/15–2023/24 | 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
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	40.9	16.8	101.9	166.0	487.5	1.3	16.0	30.1	3,517.3	720.2
2019/20	2,551.2	26.3	559.9	2.7	36.3	13.5	139.0	153.8	370.7	1.6	18.5	26.5	3,675.6	755.9
2020/21	3,107.0	21.6	704.3	2.0	50.6	10.6	156.7	137.7	526.6	3.1	17.8	20.1	4,562.9	705.7
2021/22	2,922.0	22.2	643.0	3.1	62.2	10.3	121.9	117.0	582.1	2.4	23.0	32.2	4,354.1	785.5
2022/23	2,571.1	20.3	606.2	1.2	62.1	6.6	146.5	128.2	442.9	1.0	17.1	59.0	3,845.9	659.1
2023/24*	2,446.0	18.0	660.7	3.1	75.4	7.4	147.5	124.8	756.2	1.9	16.7	10.9	4,102.5	708.7

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.

FORECASTS VS. ACTUAL PRODUCTION

CALIFORNIA ALMOND FORECASTS VS. ACTUAL PRODUCTION

crop years 2016/17–2025/26 | million pounds



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

GERMANY

Germany is a top destination for California almonds, with a strong heritage of almond use that continues to inspire innovation across Europe. As a leader in the plant-based movement, the market is well-positioned for further growth and almond consumption. While shipments have declined in recent years, Germany has historically shown modest but steady long-term growth and resilience.



PROGRAM SPOTLIGHT: PARTNERSHIP WITH LEADING FOOD RETAILER

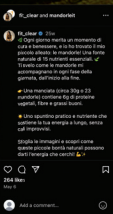
In 2025, California almonds increased visibility in Germany through advertising at REWE, one of the country's leading food retailers. The campaign featured digital out-of-home placements on 385 digital screens at store entrances across five major cities from February through June. Complementing this, a seven-week digital e-commerce campaign launched in mid-June, targeting online consumers with tailored almond recipes and driving traffic directly to the almond product pages.

ITALY



ITALY SURPASSES EXPECTATIONS

Italy has emerged as a standout market for California almonds since the Almond Board initiated activities in 2018. In fiscal year 2024/25, shipments to Italy approached 100 million pounds, representing a 13% increase over the previous year. Italy also leads all ABC markets in per capita almond consumption, with an average of 3 pounds per person annually. Notably, almonds have become the preferred nut in Italy, favored both as a snack and as an ingredient in various culinary applications.



PROGRAM SPOTLIGHT: INFLUENCER PARTNERSHIPS DRIVE ENGAGEMENT

To strengthen its market presence, the Almond Board launched a strategic partnership with eight content creators. These influencers, recognized for their credibility and strong relationships with their audiences, showcased innovative ways to incorporate almonds into daily routines.

FRANCE

BAKERY FOCUS IN FRANCE

France's influence as a culinary trendsetter extends across Europe and worldwide. The Almond Board is strengthening its engagement with the French bakery industry, with efforts designed to enhance almond integration within France's renowned bakery and pastry applications, reinforcing California almonds' reputation for quality and versatility. In 2026, ABC will be partnering with one of France's most celebrated pastry chefs, Nina Métayer, to create new excitement around almonds and bakery.



CALIFORNIA ALMOND CROP ESTIMATES + ACTUAL RECEIPTS
crop years 2005/06–2025/26 | million pounds

CROP YEAR	OBJECTIVE FORECAST	HANDLER RECEIPTS	LOSS AND EXEMPT	REDETERMINED MARKETABLE WEIGHT	LBS. REJECTS IN RECEIPTS
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	2,712.9	85.3	2,627.6	84.0
2025/26†	3,000.0	*	60.0	2,940.0	*

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



MEXICO

LEANING INTO THE BAKERY SECTOR



Mexico currently imports 33 million pounds of California almonds annually, presenting substantial growth opportunities since per capita consumption remains modest at just 0.32 pounds.

Over the past year, the Almond Board has focused on building a strong foundation for engaging the Mexican bakery trade. The country’s baking industry is experiencing a transformation, shifting from traditional baked goods toward premium, quality-focused products—an area where California almonds provide a versatile and value-added solution.

TO FURTHER CONNECT WITH THE BAKERY TRADE IN 2025, ABC:

- Introduced bakery-focused advertising.
- Hosted 11 professional bakers from Mexico for an almond immersion experience. During their visit to California, the bakers observed the almond harvest and learned about bakery-ready almond forms at a value-add processing facility.
- Developed an informative brochure illustrating how almonds can enhance baked goods.



CHINA

GROWTH POTENTIAL

With a population of 1.4 billion, China is the world’s second-most-populous country, and its middle class is expected to double over the next decade, signaling a strong opportunity for increased almond consumption. However, ongoing trade uncertainties continue to pose challenges. As a result, the Almond Board’s investment in this market has declined, and current efforts are focused on strengthening relationships within the Chinese trade sector.



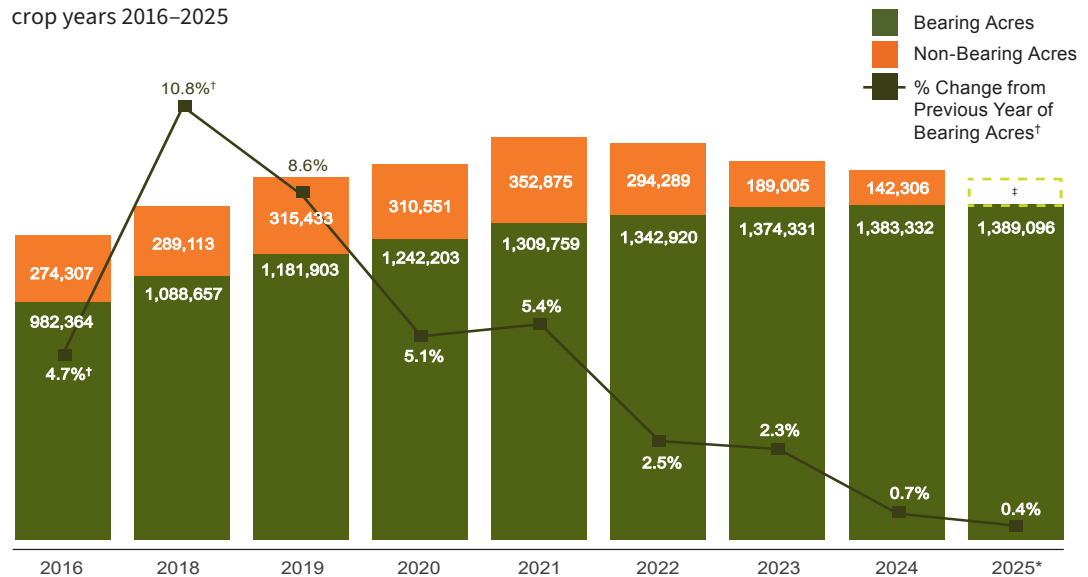
PROGRAM PRIORITIES INCLUDE:

- Communicating the unique advantages of sourcing almonds from California.
- Participating in trade events, such as the China Nuts and Dried Fruits Conference.
- Exploring opportunities in the booming China bakery sector for increased almond use.

CROP

CALIFORNIA ALMOND ACREAGE

crop years 2016–2025



Source: Land IQ, 2025 Standing Acreage Initial Estimate—April 2025. *Estimated.
†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 2016/17–2025/26

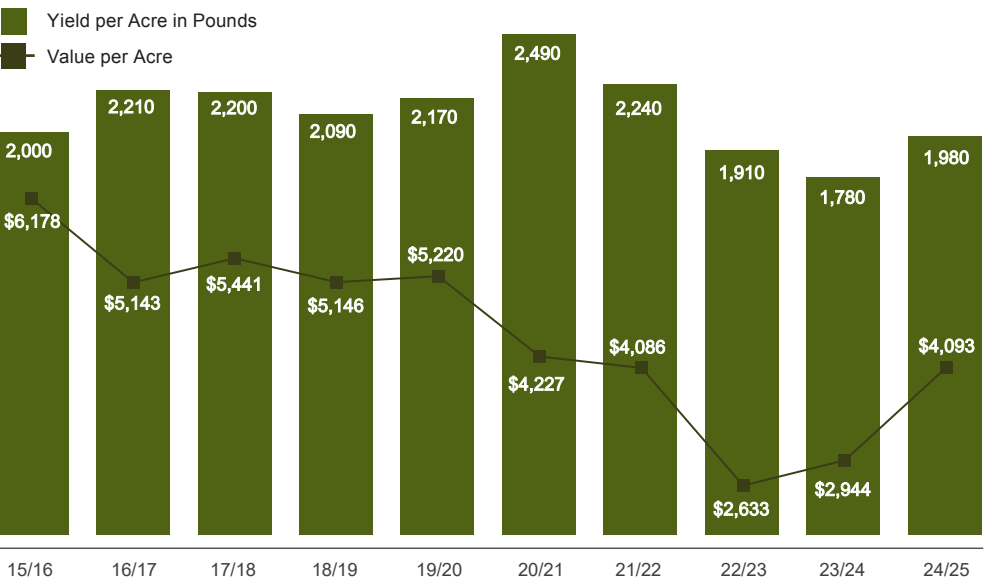
ACRES					YIELD		VALUE		
CROP YEAR	BEARING	NON-BEARING	TOTAL	AVERAGE TREES PER ACRE	BEARING ACRE YIELD (LBS.)	PRODUCTION* (MILLION LBS.)	FARM PRICE	FARM VALUE (\$1,000)	VALUE PER BEARING ACRE
2016/17	982,364	274,307	1,256,671	116.0	2,210	2,136	\$2.39	\$5,052,460	\$5,143
2017/18	-	-	-	117.0	2,200	2,260	\$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	1,780	2,446	\$1.72	\$4,045,440	\$2,944
2024/25	1,383,332	142,306	1,525,638	125.4	1,980	2,713	\$2.14	\$5,662,440	\$4,093
2025/26†	1,389,096	±	±	125.4	2,160	3,000	July 2026	July 2026	July 2026

Sources: Land IQ, USDA, NASS/PRO. Note: Land IQ data unavailable for 2017/18 crop year. USDA/NASS acreage data used for Value Per Bearing Acre calculation in 2017/18. The Almond Board does not track prices.
*Production numbers provided by Almond Board of California. †Estimated as of September 1, 2025. ‡Not available at time of publication.



CROP VALUE + YIELD PER BEARING ACRE

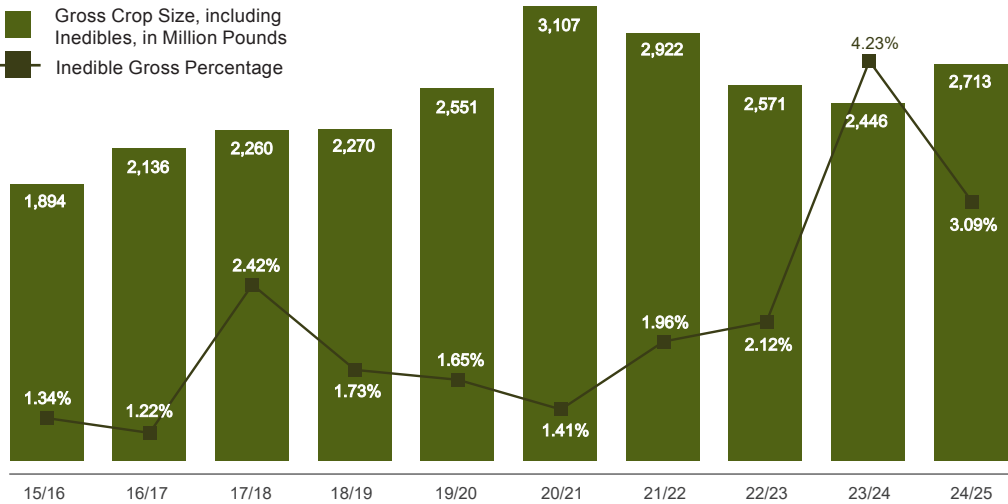
crop years 2015/16–2024/25



Source: Land IQ, USDA, NASS/PRO. Note: Land IQ Acreage Data unavailable for 2015/16 & 2017/18 crop years. USDA/NASS acreage data used for Value Per Bearing Acre Calculation.

CALIFORNIA ALMOND CROP-SIZE HISTORY + INEDIBLE PERCENTAGE

crop years 2015/16–2024/25



Source: Almond Board of California.

HELPING HONEY BEES

BEES GET THEIR FIRST FOOD OF THE YEAR IN ALMOND ORCHARDS AS THEY COLLECT NUTRITIOUS POLLEN AND NECTAR. BEEKEEPERS REPORT THEIR HIVES CONSISTENTLY LEAVE STRONGER THAN WHEN THEY ARRIVED.

CROP

CALIFORNIA ALMOND RECEIPTS BY COUNTY + VARIETY

crop year 2024/25 | pounds

Counties	% Crop	Nonpareil	Monterey	Independence	Butte/Padre	Carmel	Fritz	All Others	All Varieties
Northern									
Butte	1.8%	23,231,981	3,255,159	2,516,220	3,757,121	2,940,298	284,697	12,187,900	48,173,376
Colusa	5.1%	68,171,123	16,062,191	5,127,437	9,144,085	9,046,726	5,589,211	25,016,772	138,157,545
Glenn	3.3%	49,592,762	8,004,036	2,853,548	5,753,120	4,776,849	437,550	17,373,081	88,790,946
Solano	1.4%	15,132,948	3,822,143	9,940,133	1,973,634	1,239,973	125,185	6,531,194	38,765,210
Sutter	0.9%	9,271,803	2,240,824	6,906,908	1,938,487	798,324	107,551	3,888,008	25,151,905
Tehama	1.1%	15,289,177	2,389,162	1,268,446	2,025,812	2,139,044	8,742	5,334,970	28,455,353
Yolo	2.6%	32,143,871	9,450,366	8,219,689	2,828,890	2,428,219	648,807	15,148,123	70,867,965
Yuba	0.3%	2,472,019	817,939	2,447,182	147,237	201,942	85,318	512,514	6,684,151
Others	0.4%	3,435,629	1,168,513	4,145,085	121,288	137,202	76,845	2,156,812	11,241,374
Totals	16.8%	218,741,313	47,210,333	43,424,648	27,689,674	23,708,577	7,363,906	88,149,374	456,287,825
Central									
Merced	10.3%	106,683,964	47,305,074	39,802,535	19,919,836	10,589,296	8,537,276	45,987,451	278,825,432
San Joaquin	7.2%	69,832,556	16,625,165	49,564,988	9,698,141	12,214,865	4,225,456	32,877,121	195,038,292
Stanislaus	13.5%	134,657,262	34,899,046	77,126,372	25,567,765	22,944,767	9,611,092	61,637,265	366,443,569
Others	0.3%	2,981,481	1,177,793	1,279,309	235,363	128,133	9,981	961,275	6,773,335
Totals	31.2%	314,155,263	100,007,078	167,773,204	55,421,105	45,877,061	22,383,805	141,463,112	847,080,628
Southern									
Fresno	20.6%	213,179,538	128,645,822	85,789,366	36,262,611	3,751,748	8,830,611	83,036,867	559,496,563
Kern	12.8%	149,822,802	112,070,847	18,842,118	17,303,201	3,573,111	17,729,049	28,600,146	347,941,274
Kings	2.5%	23,503,092	17,100,519	13,833,234	4,597,087	0	673,055	8,388,236	68,095,223
Madera	11.4%	134,015,309	74,796,676	19,246,675	17,016,680	6,302,639	10,264,020	46,886,080	308,528,079
Tulare	4.6%	46,171,115	33,170,767	23,286,419	5,789,115	398,428	3,070,187	13,070,437	124,956,468
Others	0.0%	184,529	169,383	346,840	0	33,813	17,994	350,572	1,103,131
Totals	52.0%	566,876,385	365,954,014	161,344,652	80,968,694	14,059,739	40,584,916	180,332,338	1,410,120,738
Grand Total	100.0%	1,099,772,961	513,171,425	372,542,504	164,079,473	83,645,377	70,332,627	409,944,824	2,713,489,191

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

CALIFORNIA ALMOND PRODUCTION BY COUNTY

crop years 2015/16–2024/25 | 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						
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	17.4	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
2024/25	138.2	88.8	70.9	48.2	38.8	28.5	25.2	6.7	366.4	278.8	195.0	559.5	347.9	308.5	125.0	68.1	19.1	2,713.5

Source: USDA, Report of Inedible Content of Almond Receipts. Note: Totals may not add precisely due to rounding.

JAPAN + SOUTH KOREA

California almond exports to Japan and South Korea remained strong, with 91 million pounds shipped to Japan and 61 million pounds to South Korea in fiscal year 2024/25. California dominates the market share in both countries, so it is important to continue to have an active presence. Current efforts prioritize consistent messaging on almond nutrition benefits and cultivating trade relationships.

PROGRAM SPOTLIGHT:
#1 RETAILER IN SOUTH KOREA

In August 2025, the Almond Board sponsored an in-store promotion across more than 400 Emart locations throughout South Korea, including hypermarkets and grocery stores. The promotion resulted in a **91% increase in volume and a 129% increase in value year-on-year.**

The promotion not only achieved significant sales growth but also highlighted the importance of these types of activations, which will guide future retail activities in South Korea and inform similar programs in other markets.



EXPANSION INTO EMERGING MARKETS



ABC's Keith Schneller representing the Almond Board at the Tuksied Annual Conference in April 2025.

TURKEY

Nut consumption in Turkey remains consistently high. In fact, it is the world's largest producer and exporter of hazelnuts and produces some almonds and pistachios. To meet demand for almonds—both for domestic consumption and processed exports—shipments to this market are steadily rising to record levels. In 2024/25, Turkey imported 107 million pounds of almonds from California, which is a 7% increase over the prior year. In September 2025, Turkey **eliminated retaliatory tariffs on U.S. ag imports**, which leveled the playing field with almond imports from Australia.

The Almond Board of California's market assessment identified strong growth potential in Turkey, prompting initiatives such as building trade relationships and launching a health-focused social media campaign.



First-ever Almonds 101 Trade Event took place in Casablanca in May 2025.

MOROCCO

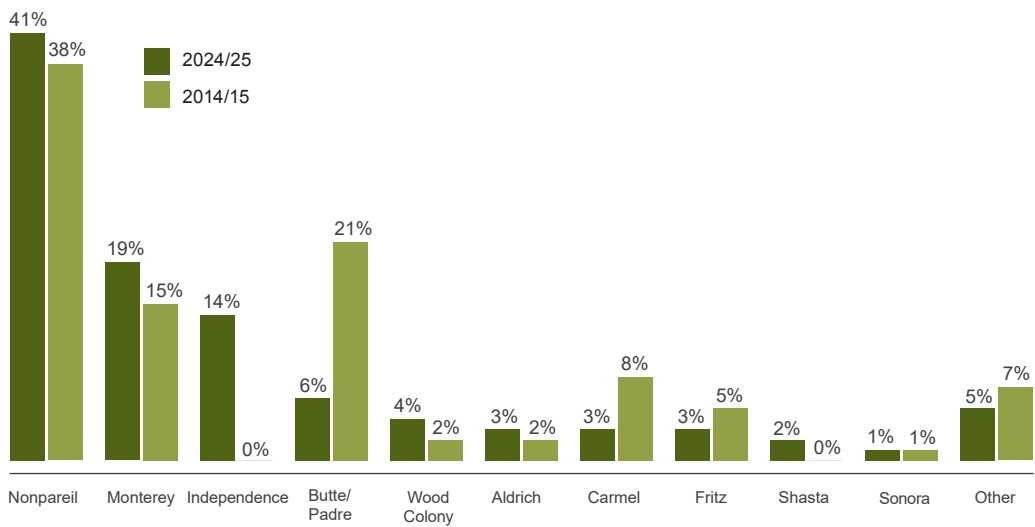
Almonds hold a significant place in the cultural heritage of Morocco. In 2024/25, Morocco imported 58 million pounds of California almonds, reflecting notable growth since the implementation of the **U.S.-Morocco Free Trade Agreement (FTA) in 2019**—the U.S.'s only FTA in Africa. In fact, the U.S. continues to account for 73% of the market share. Morocco also grows some almonds but is importing more from the U.S. to meet growing demand.



In 2026, the Almond Board will launch a program with the **Baking and Pastry Training Institute in Casablanca**. This collaboration is designed to further increase almond usage and keep almonds relevant among professionals in Morocco's baking and pastry sector.

TOP 10 ALMOND-PRODUCING VARIETIES

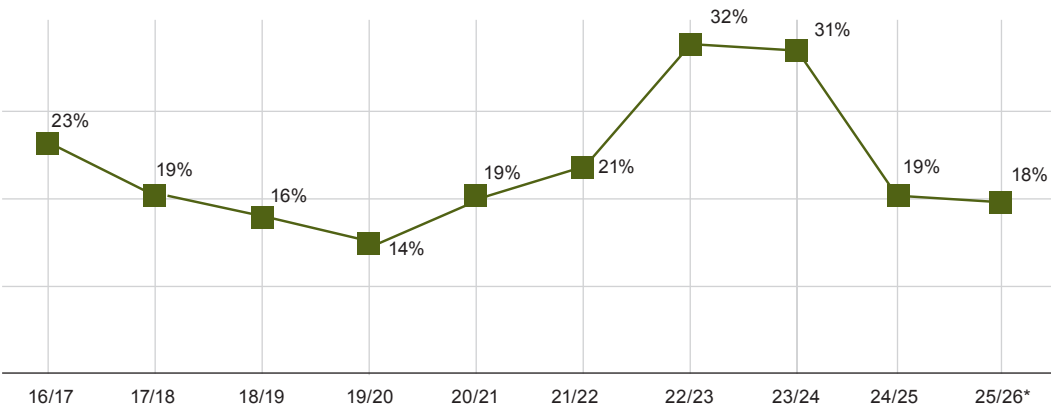
crop years 2014/15 vs. 2024/25



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 2016/17–2025/26



Source: Almond Board of California. *Forecasted.

CALIFORNIA PRIDE

UNDERSTANDING THE ORIGINS OF OUR FOOD IS ESSENTIAL, AND THE ALMOND BOARD IS COMMITTED TO EDUCATING STAKEHOLDERS THAT CALIFORNIA IS ONE OF THE FEW PLACES ON EARTH WITH THE MEDITERRANEAN CLIMATE NECESSARY TO GROW ALMONDS.

ABC’s programs focus on raising awareness of environmental stewardship, ongoing research and the broader role almonds have on the economy. These efforts specifically target urban communities such as Sacramento, San Diego, San Francisco and Los Angeles, where residents may be less familiar with farming.

ONLY CALIFORNIA WILL DO

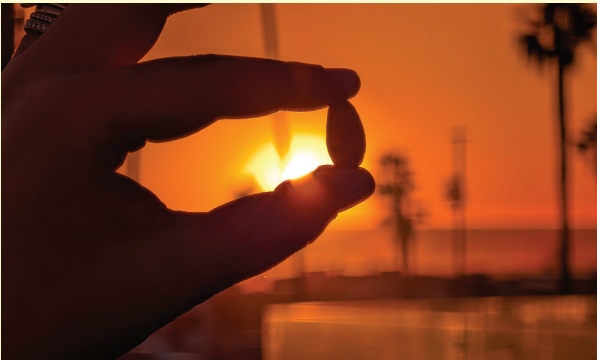
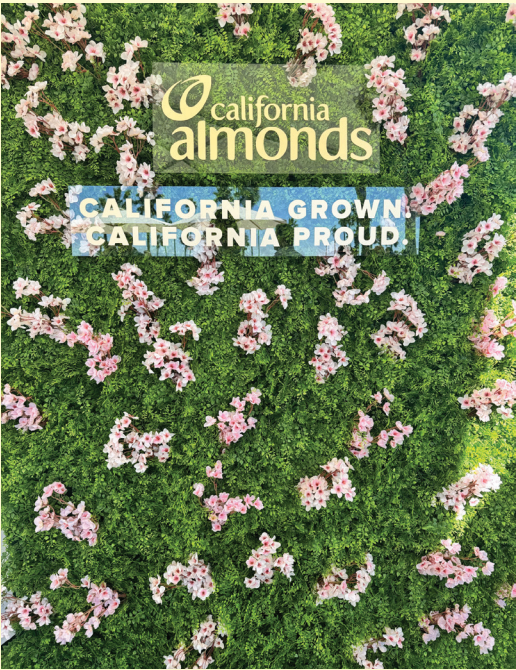
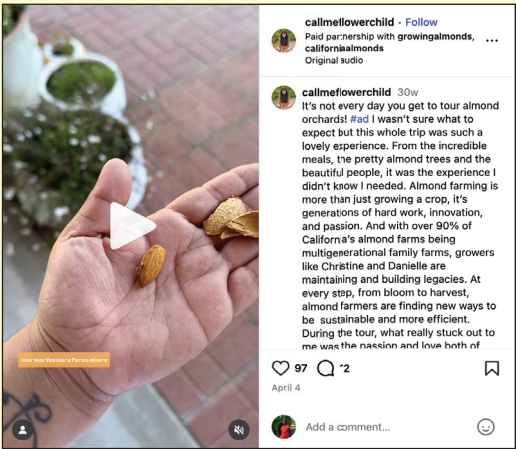
In 2025, the Almond Board introduced the Only California Will Do advertising campaign, aimed at engaging urban Californians, highlighting the state’s exclusive role in almond production and fostering a deeper connection to California almonds.

INFLUENCERS VISIT CALIFORNIA DURING BLOOM

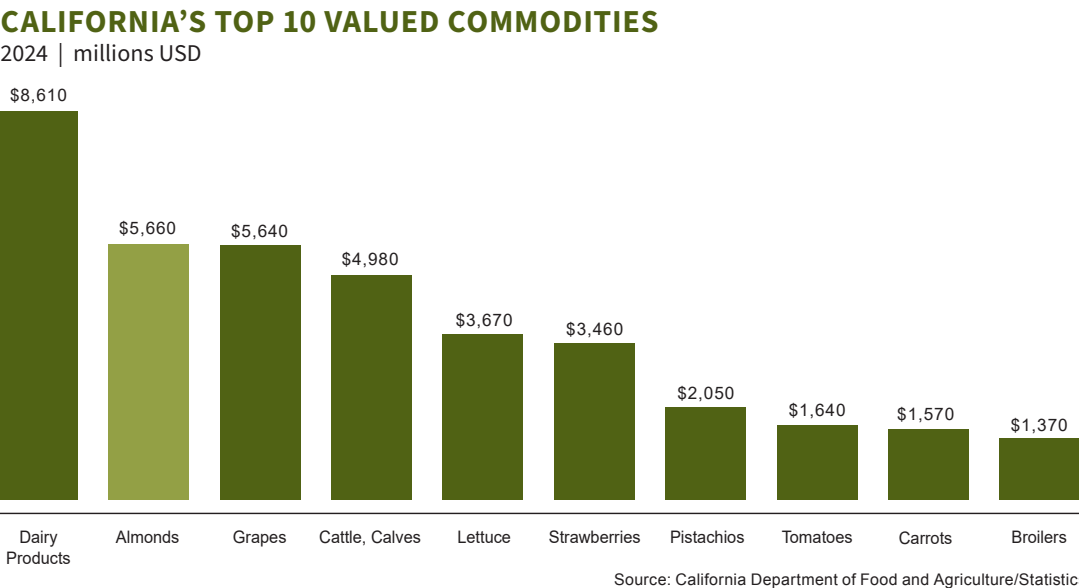
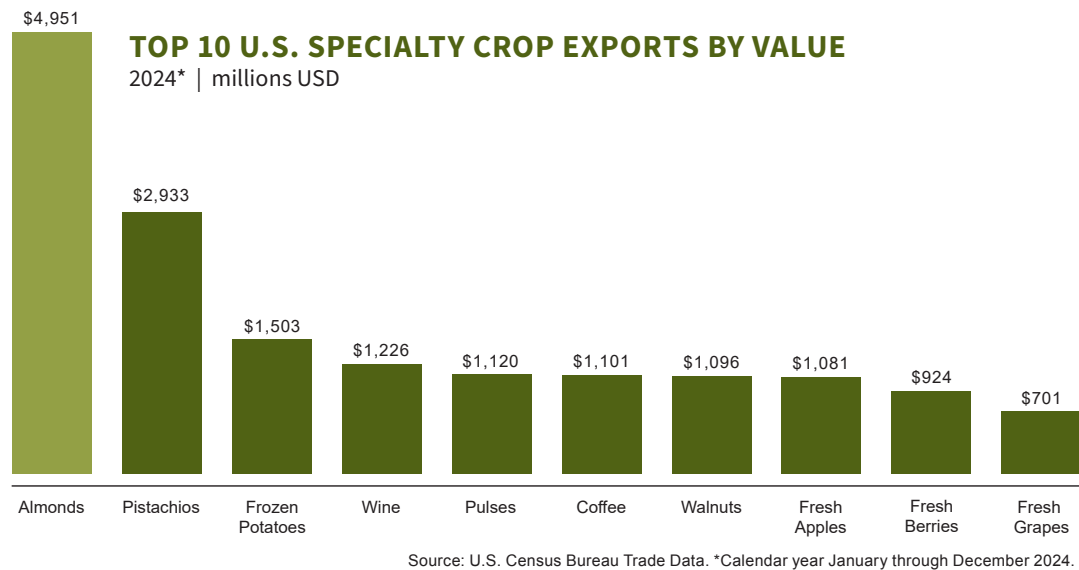
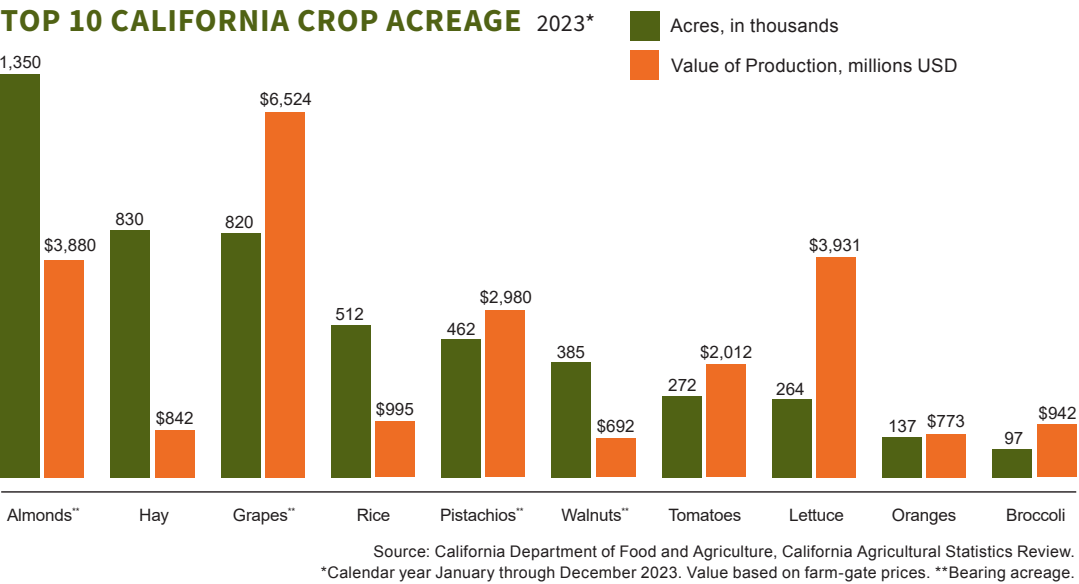
To further promote the California almond industry, the Almond Board partnered with six key influencers specializing in diverse topics. These influencers participated in a Bloom Tour, where they learned firsthand about growing and processing almonds and the industry’s ongoing improvements. The tour generated 80 distinct social media posts, highlighting the positive work of the industry.

CALIFORNIA ALMONDS AND WINE—A PERFECT PAIRING

Aligning with a like-minded industry, California almonds recently attended the California Wine Festival to celebrate the industry’s unique attributes and deep Californian roots. In addition to ABC on-site activities such as an almond blossom-inspired booth and product sampling, influencer partners supported the event, helping to amplify the industry’s message to enhance awareness of California almonds’ versatility and agricultural legacy among urban communities.



ALMONDS + OTHER CROPS



WHY CALIFORNIA

LEARN MORE ABOUT THE CA ADVANTAGE:



HIGH STANDARDS

California’s growing environment is one of the **MOST REGULATED GLOBALLY**, with strict laws and enforcement protecting the environment, worker and food safety.

FAMILY FARMS

There are more than 7,600 almond farmers in California: **NEARLY 90% ARE FAMILY FARMS**, and 70% of orchards are 100 acres or less. In fact, **50% OF FARMS ARE 1–49 ACRES**.

Many almond farms 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.

NINETY-ONE ALMOND HANDLERS PROCESS CALIFORNIA ALMONDS. Many of these operations are also family owned.



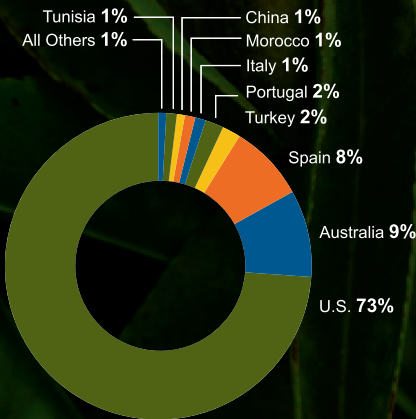
IDEAL CLIMATE

California is **1 OF ONLY 5 MEDITERRANEAN CLIMATES** on Earth, essential to growing almonds.

GLOBAL LEADER IN ALMOND PRODUCTION

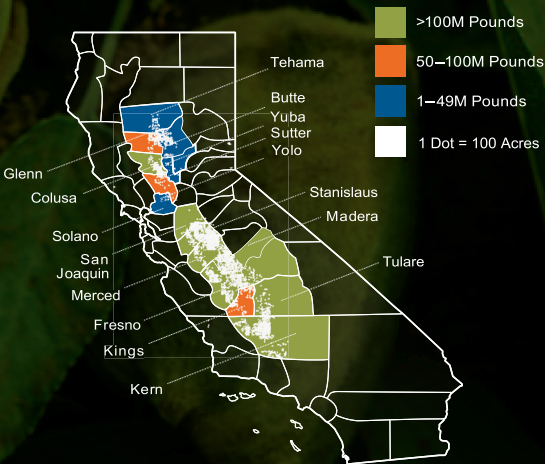
California is the #1 growing region for almonds due to its Mediterranean climate, renowned universities, strategic partnerships, robust water infrastructure and fertile soils. This unique blend of resources and expertise enables the state to supply a significant portion of the world’s almonds and set industry standards in quality and environmental stewardship.

WORLD ALMOND PRODUCTION
crop year 2024/25



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

CALIFORNIA ALMOND PRODUCTION
production by county | crop year 2024/25



Source: USDA Incoming Receipts.

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