



**THE ALMOND
CONFERENCE**

20
25

WELCOME!



CULTIVATING A HEALTHIER
FUTURE

GLOBAL TRADE

Keep your Seatbelts Fastened!

Wednesday, December 10

12:30 – 1:45 p.m.



GLOBAL TRADE—KEEP YOUR SEATBELTS FASTENED!

WELCOME!

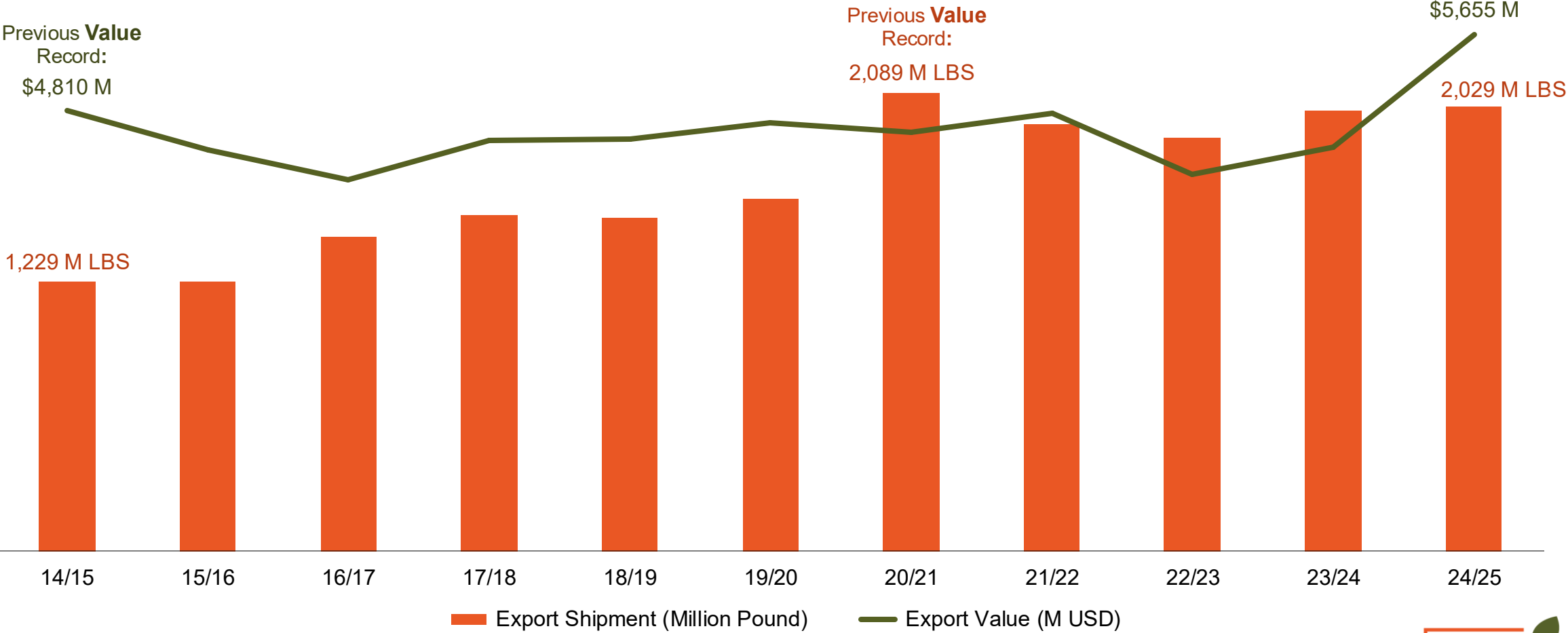
Panel Discussion

Q&A: Please use the QR codes for this session

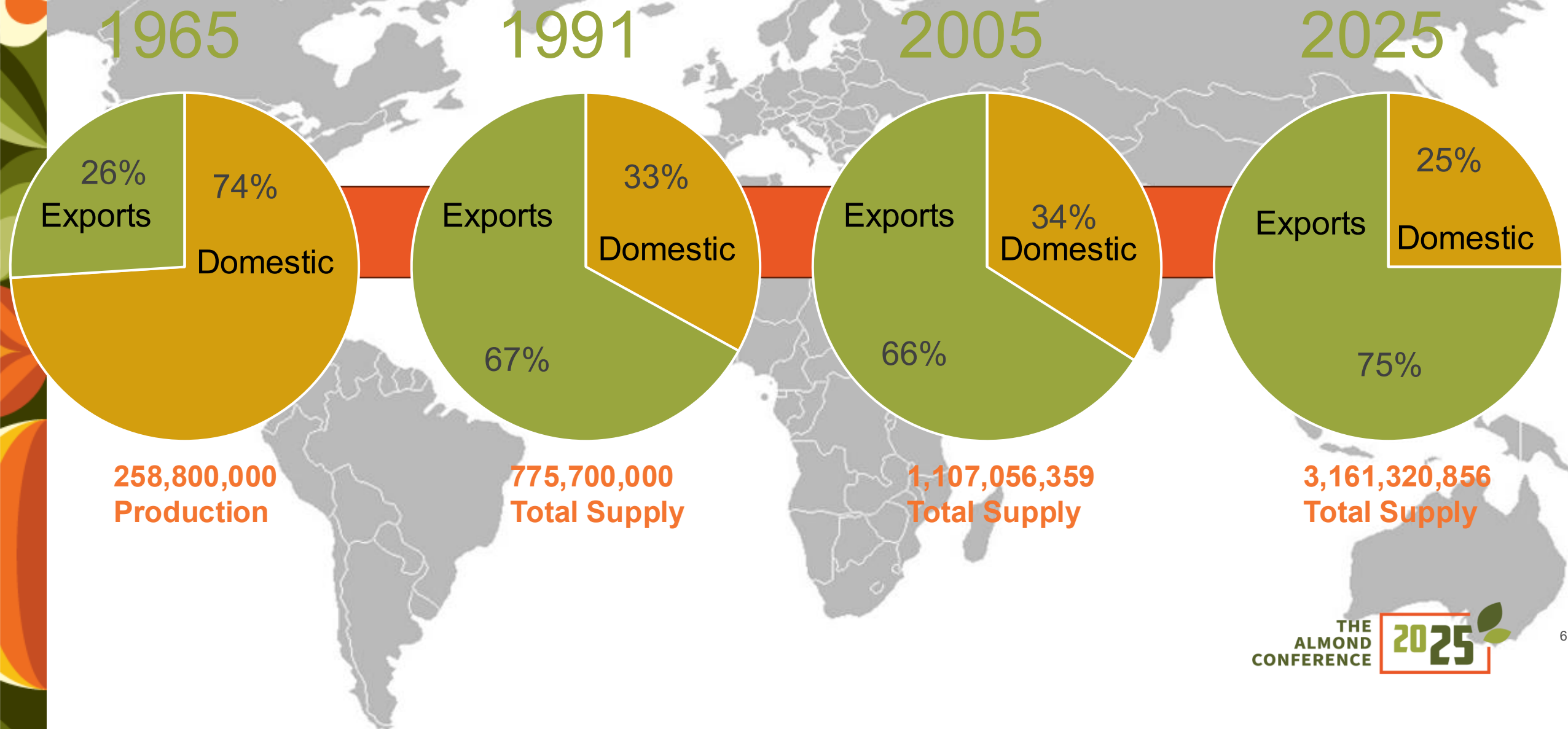


**MARKETS EVOLVE AND CHANGE....
SO DO ALMOND SHIPMENTS**

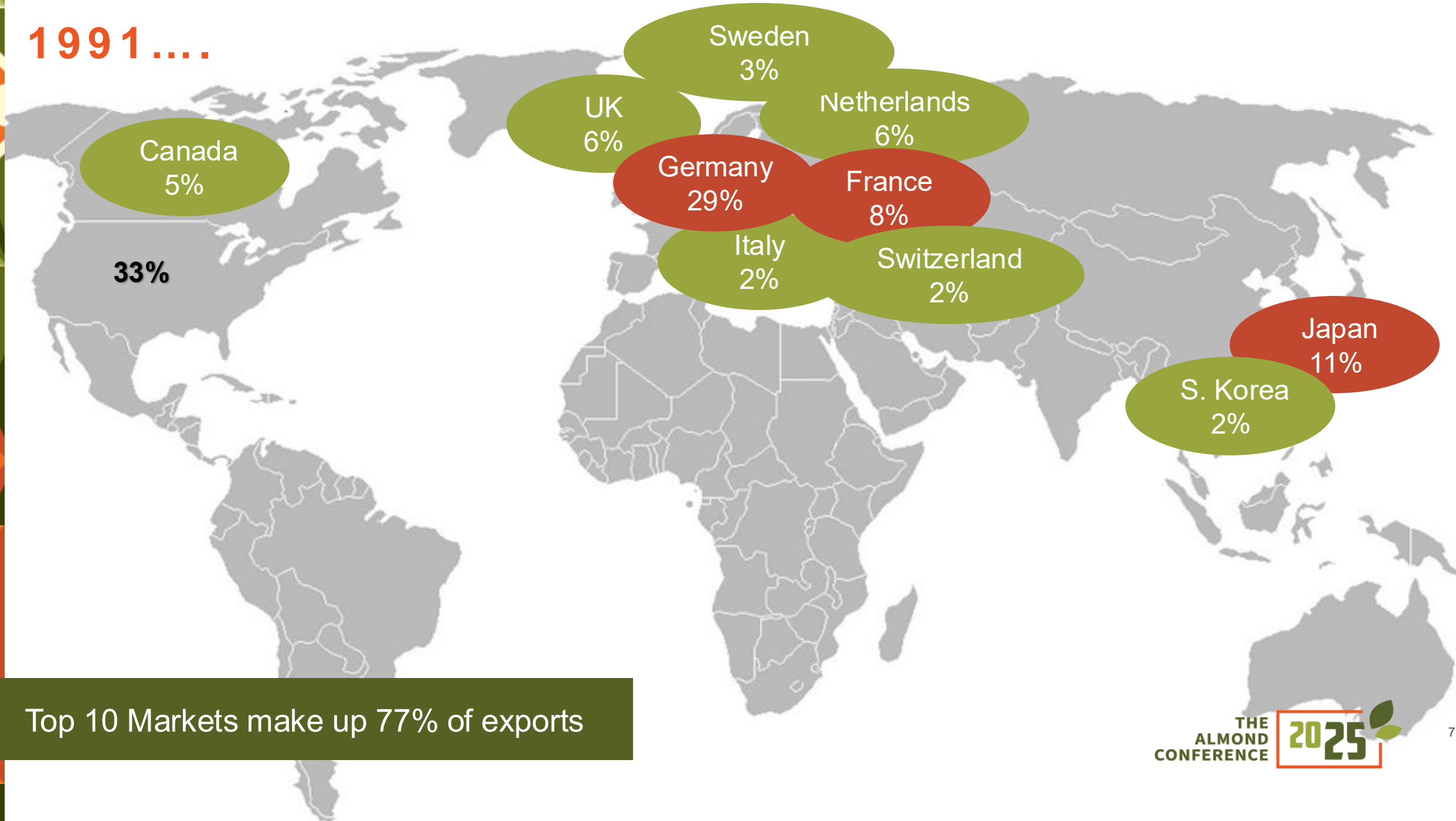
EXPORT SHIPMENTS (M LBS.)
VS
EXPORT VALUE (M USD)



CHANGING MARKET SHIPMENTS

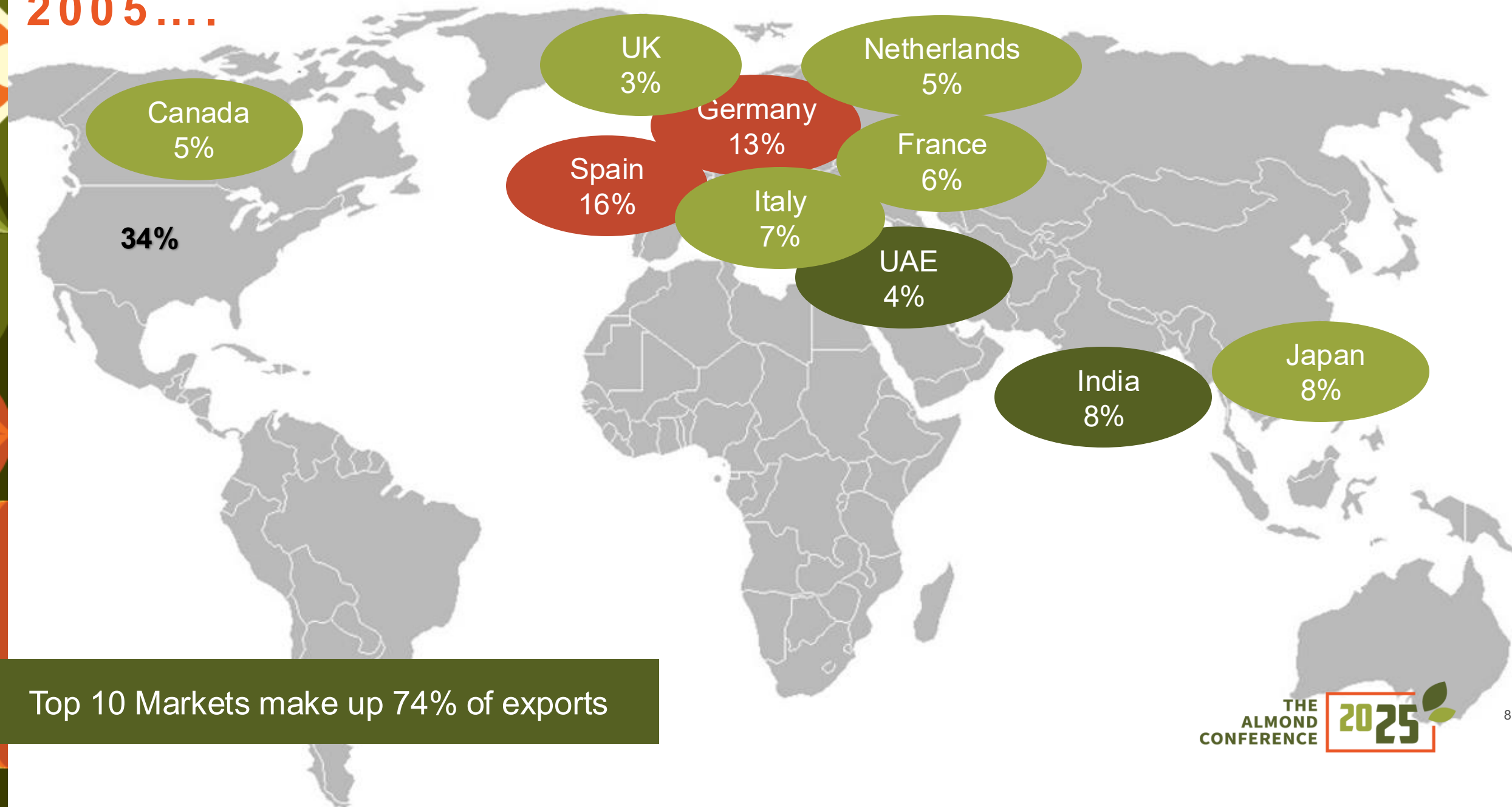


1991....



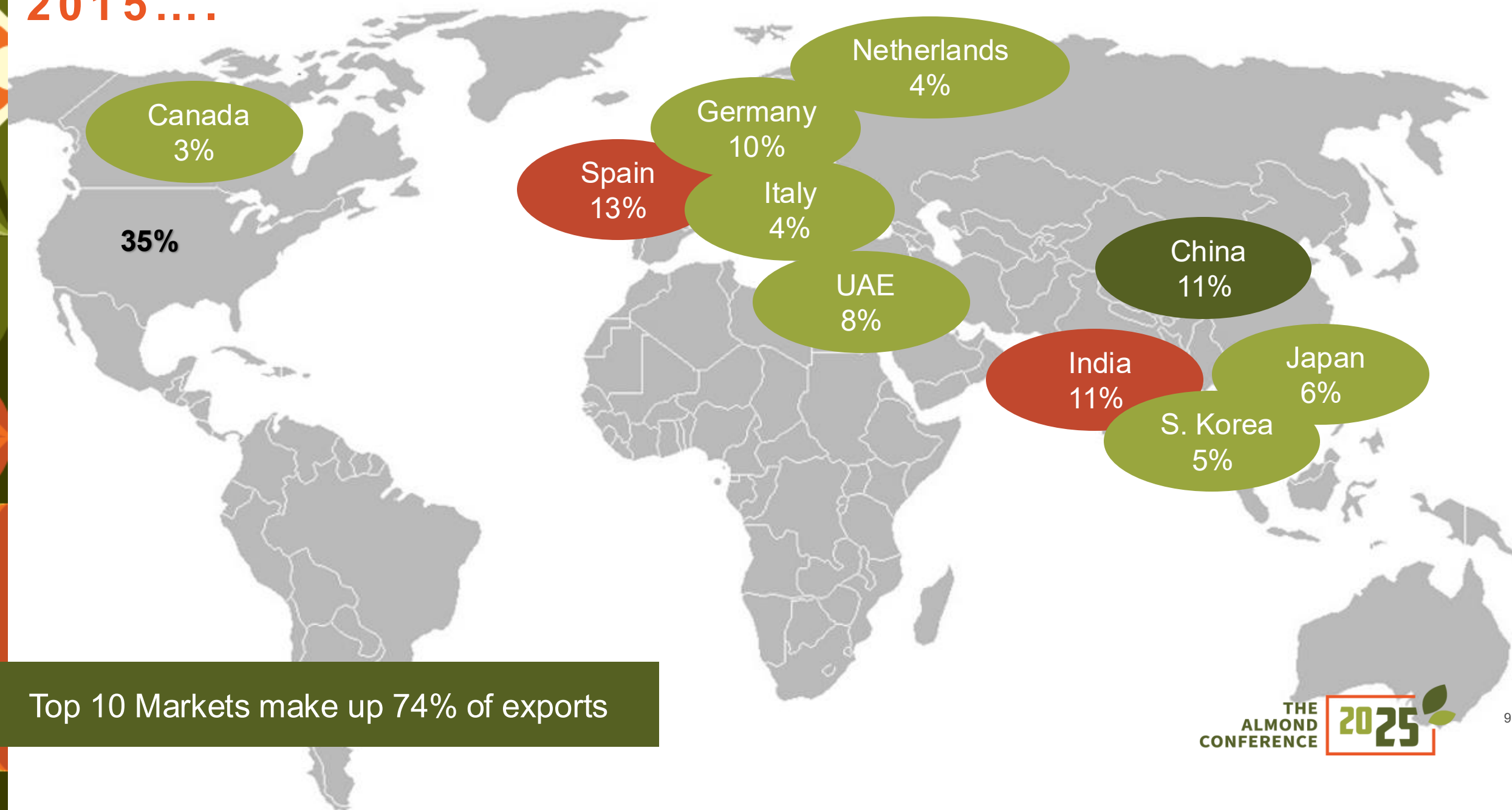
Top 10 Markets make up 77% of exports

2005....



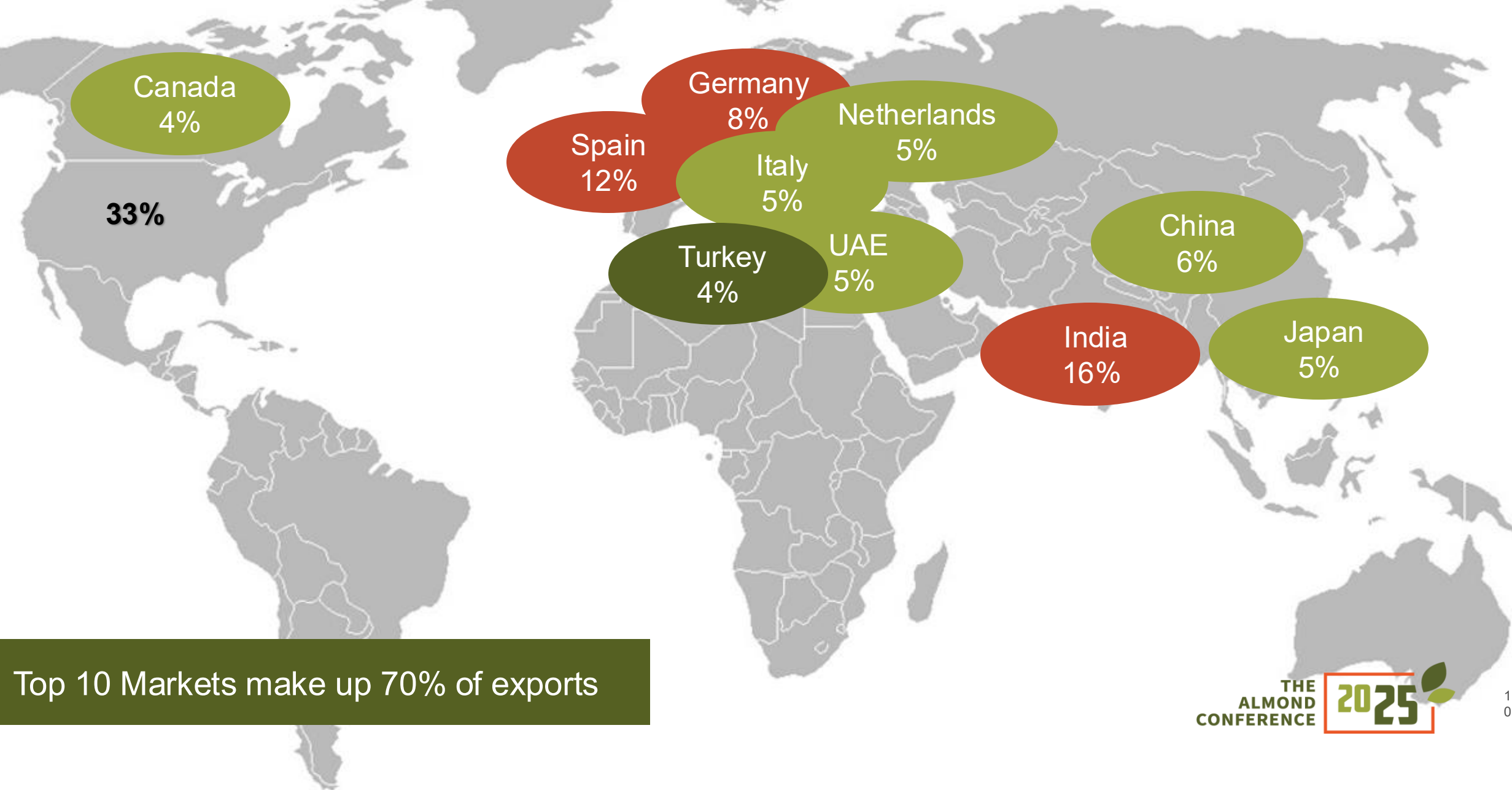
Top 10 Markets make up 74% of exports

2015....

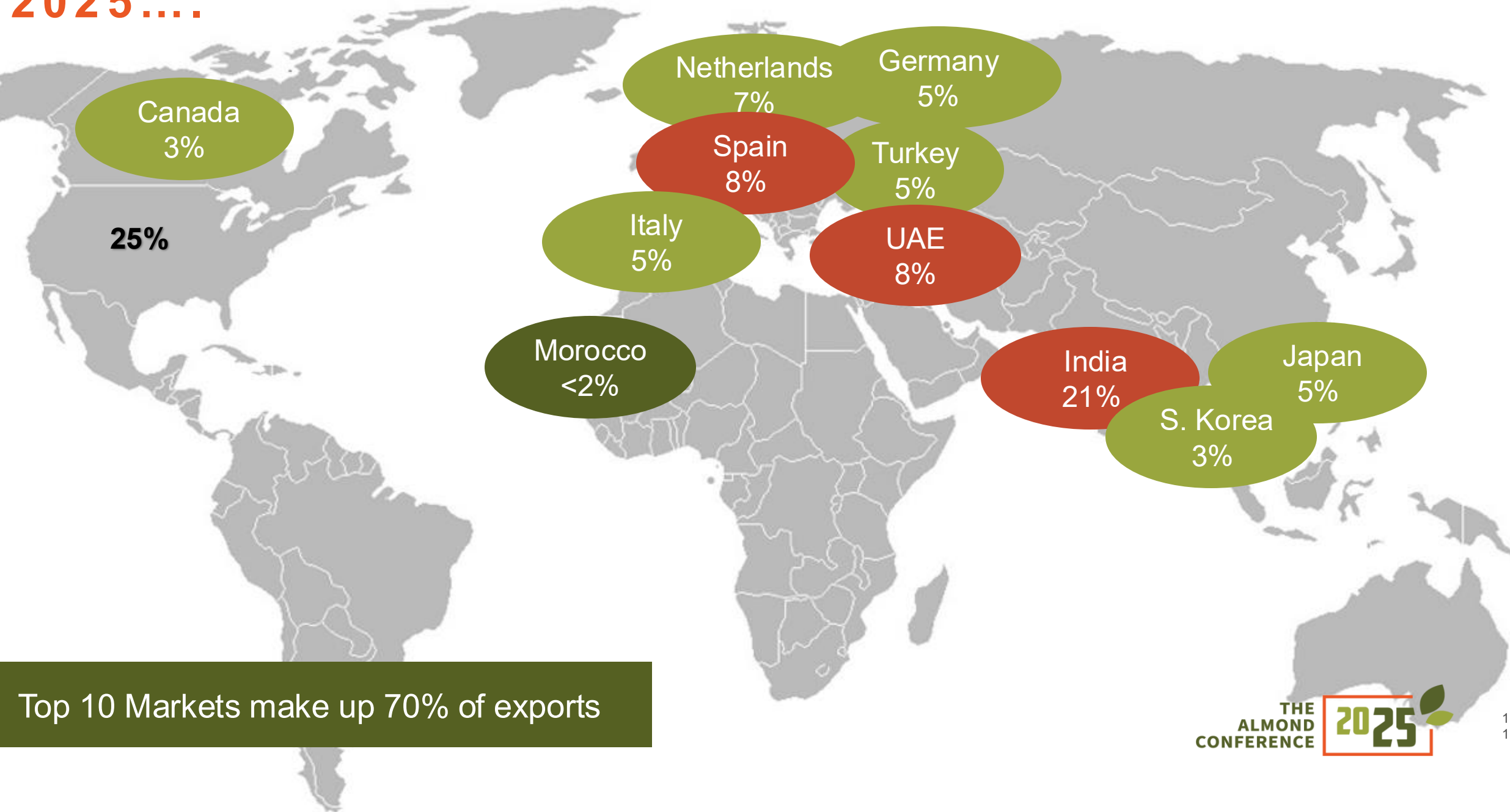


Top 10 Markets make up 74% of exports

2020: RETALIATORY TARIFFS



2025....



Top 10 Markets make up 70% of exports



**TRADE IMPLICATIONS CAN BE
SIGNIFICANT.....**

FY 25/26 Priorities

US

- Strategy with Alliance
- Implement pesticide strategy
- Increase CA agency engagement
- Common nut approach

EU/UK

- Address **EU tariffs**
- Extend **GB tariff** suspension
- Clarify Ag Vision
- Identify new EU priorities

China

- Focus on Decree 248
- **Retaliatory tariffs**
- Engage key partners/government
- Monitor SE Asia

India

- Address **tariff**/technical issues
- Kernel grade standards
- RAPP funds for partnerships
- Expand ABC partnership

Worldwide - Trade

- Engage USG offices
- **Build data on tariffs, waivers, suspensions**
- Trade workshops (Morocco, Turkey)
- Expand contacts in emerging markets

Monitoring

- Almond hull protocols (USG)
- Align UNECE, Codex, US standards
- USG Goods Return adoption
- State/Fed environmental issues

Pesticide Strategy

- Credit for CA/US regulations
- Track infestation/best practices
- Registrant outreach
- Missing/problem MRLs

Contaminant Strategy

- Japan pre-test (USG/industry)
- EU ports/agencies (PEC)
- Data on new contaminants

A CHANGE IN OUR PANEL.....

GLOBAL TRADE—KEEP YOUR SEATBELTS
FASTENED!



Julie Callahan
AWAITING CONFIRMATION!
USTR Chief Ag Negotiator

PANEL DISCUSSION:

GLOBAL TRADE—KEEP YOUR SEATBELTS FASTENED!



Krista Dickson, DTB AgriTrade, Partner

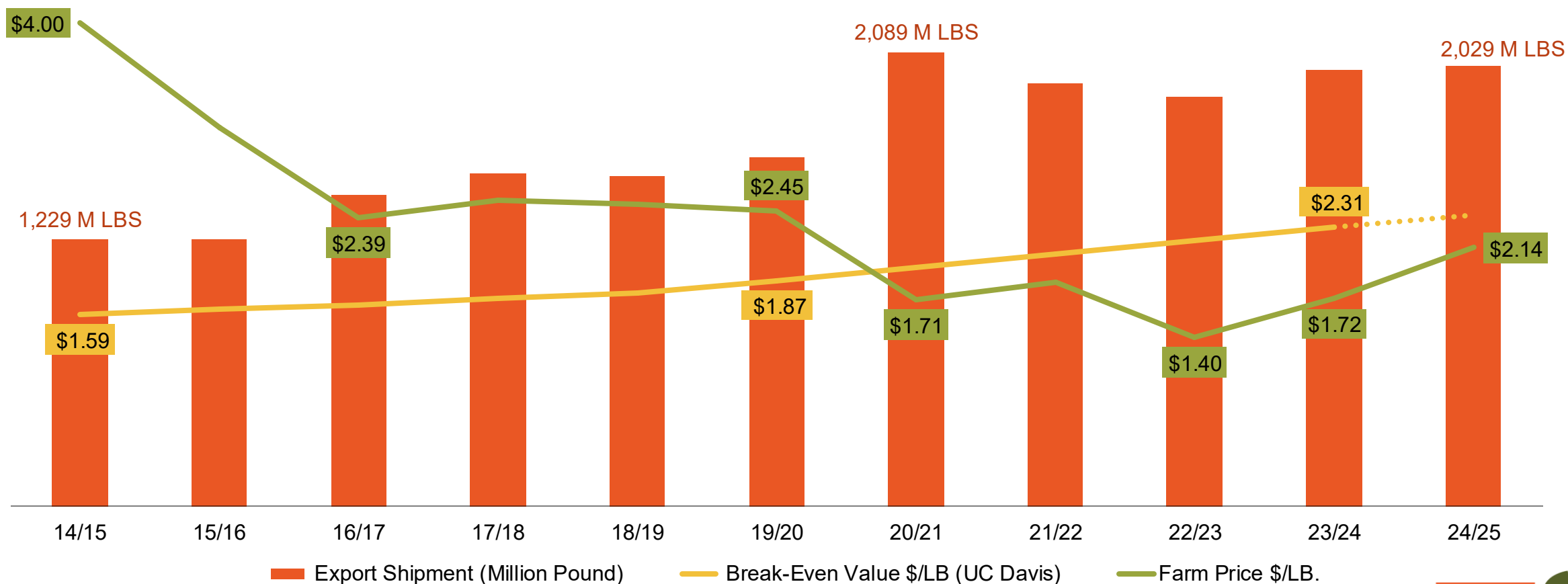
After working for nearly 25 years on agricultural trade issues for the U.S. government, Krista joined DTB this year. She has held senior positions at the U.S. Department of Agriculture (USDA) and the Office of the United States Trade Representative (USTR), where she directed major agricultural trade initiatives and market access efforts. At USTR, she negotiated with the EU and UK on sanitary and phytosanitary issues, securing agreements that protected U.S. exports.



Jonathan Hoff, CEO, *Monte Vista Farming Company*

A third-generation almond farmer from Ripon, and Chair of ABC's Technical Regulatory Affairs Committee. Jonathan spent hours on the ranch as a child, then worked with his father in the family processing plant. His focus is to enhance both the value of the crop it sells for its growers, while also increasing the value of its offering to customers both domestic and abroad.

EXPORT SHIPMENTS (M LBS.) VS FARM PRICE PER POUND AND BREAK-EVEN VALUE PER POUND



GLOBAL TRADE—KEEP YOUR SEATBELTS FASTENED!

DISCUSSION





THANK YOU!



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