THE ALMOND CONFERENCE 2025

WELCOME!

STATE OF THE INDUSTRY

WEDNESDAY DECEMBER 10, 2025

CULTIVATING A HEALTHIER FUTURE

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

ALMOND OPERATING COSTS $/ACRE

Listen to the Almond Journey podcast for more details:

Forcasted Compound Annual Growth

California: - 1%

International: 3%

ALMOND BOARD OF CALIFORNIA

75 YEARS

CULTIVATING A HEALTHIER
FUTURE

Timeline Video

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

DOMESTIC PER CAP TREE NUT CONSUMPTION

UK
GERMANY
FRANCE
ITALY
CHINA
JAPAN
UNITED STATES
TURKEY
MOROCCO
SOUTH KOREA
INDIA
MEXICO

30 YEARS OF NUTRITION RESEARCH

530 | Health-Promoting Compounds

brightseed

SPROUTS
GELATO BOMBS
Chocolate
SPROUTS
AMARETTO CHERRY GELATO
DR. BOMBAY
SHIZZLE ALMOND FUDGE
Limited Edition Coffee Almond Fudge
MUSH kids
OATMEAL SMOOTHIE
Creamy Garlic
fav'orite day
pecan praline
Chopped Salad Kit
ASIAN
FORAGED & FOUND
SMOOTHIE
QUEST
rise
VANILLA
NEW
ATKINS
Coffee HOUSE COLLECTION
VANILLA LATTE BAR
16G 4G 2G 13G
bettergoods
Coconut Chocolate Cookie Dough Bites
McConnell's
FINE ICE CREAMS
See's CANDIES
VANILLA CALIFORNIA BRITTLE
NATURE VALLEY
YOGURT TOPPERS
HONEY BLUEBERRY
Gelato Pehini
CREMA SICILIANA
GELATO
Amy's
ENCHILADA
MOLE
Taylor Farms
Apple Feta
SALAD KIT
bowl & basket
ALFREDO
Almond Butter
CRUNCHY
EVERGREEN
SPINACH, egg & CHEESE
PURE PROTEIN
BROOKIE
ONE
Reeses
MP
COMBAT
SPORT BAR
KAUKAUNA
TRUFFLE WHITE CHEDDAR
Brie & Topping
CASTELLO
TASTE HAWAII
PINEAPPLE, ALMOND & PAPAYA
CREAM CHEESE SPREAD
almond MALK creamer
ORGANIC
CALIFIA FARMS
Sugar Cookie
open nature
dairy-free
ALMOND BEVERAGE
VANILLA
Well Market
almonds
MILK CHOCOLATE
TRADER JOE'S
Cocoa truffles
COLLECTION
Italian Confetti Almonds
bettergoods
Dark Chocolate & Almond Truffles
ICE CREAM SHOP TRUFFLES
DIAMOND
DELIVERED ALMONDS
mugsy
Chocolate Peppermint Cake
SLICED ALMONDS
nut pods
almond + coconut CREAMER
PISTACHIO
The Laughing Cow
PLANT-BASED
OIKOS
11g PROTEIN
COCO ALMOND CHOCOLATE
REMIX
LIGHT + FIT
110
REMIX
suja
PROTEIN
Larsen's
BIT-O-HONEY
LILY'S
COVERED ALMONDS
DARK CHOCOLATE STYLE
CHOCOLATE MARSHMALLOW BITES
See's CANDIES
myna
PIZZA CRACKERS
fav'orite day
RASPBERRY
macaron
bettergoods
Balsamic Vinegar Crackers
Well Market
ROASTED
almonds
LIGHT SEA SALT
know & love
Dry Roasted Almonds
BARODY
over joyed
LIMITED EDITION
PEPPERMINT COCOA
bettergoods
Raw Mixed Nuts
RXBAR
No B.S.
Coconut Chocolate
ROBERT IRVINE'S
FIT CRUNCH
High Protein Baked Bar
Strawberry Strudel
Millville
SWEET & SALTY NUT
Peanut
ORGANIC
Fruit & Nut
brekki
orange ginger
PICKY BARS
PROTEIN BAR
MET-RX
GRANOLA
CHOCOLATE CHIP
Stellar eats
Carrot Cake Muffin
SWEET & SPICY
TRAIL MIX
Holiday Mix
Almonds
HONEY ROASTED
Nanda Madness
POPCORN
NEW!
DAVE'S BREAD
PB & CHOCOLATE
SNACK BITES
JAMIE'S FARM NEW YORK
Kyoto Matcha
Organic
tosí
Crunchy Snack Bars
12 BARS
High Protein
Low Sugar
MARGIE'S MARKET
TRUE PRIMAL
GRAINLESS GRANOLA
ORIGINAL
SMART PROTEIN PORRIDGE
PROTEIN BAR
fav'orite day
milk chocolate & toffee covered

ALMONDS ADDED TO

130,920

SMOOTHIES

A 70% INCREASE OVER THE
10-WEEK PREVIOUS PERIOD

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

BOB SILVEIRA

2025/26 BOARD CHAIRMAN

ALMOND BOARD OF CALIFORNIA

ALMOND CONFERENCE 2025

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2025 ALMOND LEADERSHIP PROGRAM

ALMOND CONFERENCE 2025

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

TOTAL SUPPLY

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

Economics Video

ALEXI RODRIGUEZ

ABC Past Chair
and CEO Almond Alliance

BOB SILVEIRA

2025/26 ABC Board
Chairman

LUCAS VAN DUYN

Van Duyn Family Farms

DINESH BAJAJ

Select Harvest

STUART WOOLF

Woolf Farming & Processing

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

Hero Video

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

DRIVING GLOBAL DEMAND

DRIVING DEMAND

ALMOND CONFERENCE 2025

DRIVING GLOBAL DEMAND

INGREDIENT INNOVATION
GLOBAL BAKERY
EMERGING MARKETS
HEALTHY SNACKING

ALMOND CONFERENCE 2025

DRIVING GLOBAL DEMAND
INGREDIENT INNOVATION

SNACK
VOLUME / 50%
INGREDIENT
VOLUME / 50%

ALMOND
MILK

ALMOND HULLS

ALMOND PASTE

DEFATTED ALMOND
BUTTER OR FLOUR

ALMOND
MEAL

CHOPPED
ALMONDS

DICED
ALMONDS

SLIVERED
ALMONDS

ALMOND
FLOUR

ALMOND OIL

ALMOND
BUTTER

WHOLE
ALMONDS

SLICED BLANCHED
ALMONDS

SLICED
ALMONDS

Culinary Institute
of America

COLLEGE & UNIVERSITY PROGRAM

UNIVERSITY OF MASSACHUSETTS 1863

ALMOND CONFERENCE 2025

THE ALMOND CONFERENCE 2025

BREAKFAST SESSION

ALMONDS IN ACTION – DRIVING INNOVATION IN FOOD AND BEVERAGES

8:00–9:30A.M. / BALLROOM A

DRIVING GLOBAL DEMAND
GLOBAL BAKERY

CHINA BAKERY COMPETITION

MX Bakery Video

DRIVING GLOBAL DEMAND
EMERGING MARKETS

UK
GERMANY
FRANCE
ITALY
CHINA
JAPAN
TURKEY
UNITED STATES
MOROCCO
SOUTH KOREA
INDIA
MEXICO

MOROCCO

IFMBP

معهد التكوين في مهن الخبازة والحلويات

ⵙⵓⴷⵉⵙⵜ ⵏ ⵓⵙⵎⵓⵜⵜⴰⵏ ⴷ ⵓⵙⵓⵎⵓⵜ ⵏ ⵜⵏⵢⵓⵙⵜ ⴷ ⵜⵓⵓⵕⵜ - ⴷⴷⴰⵕ ⵏⵓⵣⵉⵙ

Institut de Formation aux Métiers de
LA BOULANGERIE ET LA PÂTISSERIE

ALMOND CONFERENCE 2025

TURKEY

ALMOND CONFERENCE 2025

DRIVING GLOBAL DEMAND
EMERGING MARKETS

DRIVING GLOBAL DEMAND
HEALTHY SNACKING

ALMOND CONFERENCE 2025

VOLUME VS YAGO
Total Nuts: -6.2%
-8.8%
-8.7%
-14.5%
-12.7%

LOOK GOOD.
FEEL GOOD.
SNACK GOOD

Dern Almonds Video

amazon

THE ALMOND CONFERENCE 2025

ALMOND CONFERENCE 2025

UNDER 30 **52%**

AGES 25-64 **41%**

65 AND OLDER **7%**

THE ALMOND CONFERENCE 2025

DRIVING GLOBAL DEMAND

STATE OF THE INDUSTRY

CULTIVATING A HEALTHIER

FUTURE

PRESENTATION WILL RESUME SHORTLY

UNUSED SLIDES FOLLOW