

GLOBAL UPDATE



January 12, 2026

The Almond Conference – Global Trade Panels

During the Almond Conference, ABC hosted several panels on global trade, international shipping, and regulatory issues impacting the U.S. almond industry. Below is a photo of the global trade update panel with Jonathan Hoff, Chair of the Technical and Regulatory Affairs Committee, Krista Dickson, Partner at DTB AgTrade, and Julie Adams, ABC Vice President, Global Technical and Regulatory Affairs. Panelists discussed recent trade wins and their impact on the U.S. almond sector, as well as the implications of pending negotiations.



Latest Tariff and Trade Updates

Following is a quick rundown of recent tariff and trade activities. ABC is closely monitoring the announcements, to identify where these framework agreements directly benefit almonds:

- U.S. trade negotiators were in India on the week of December 10 to finalize outstanding issues such as agriculture in the U.S.-India bilateral trade agreement. At this point, no further developments have been announced.
- On December 16, the Section 301 Committee convened a public hearing as part of an ongoing Section 301 investigation whether China has implemented its commitments under the Phase 1 Agreement. Several agricultural trade groups noted how China is not complying with Phase 1 obligations but also encouraged the Administration to build on the agreement.

- The Trump Administration postponed an increase of 50% tariffs on wood (furniture, kitchen cabinets, and vanities) for 1 year.
- The U.S. Department of Commerce announced it will cut its anti-dumping tariffs on Italian pasta.
- The European Union delayed the signing of the Mercosur trade deal amid backlash from farmers in France, Italy, and Poland.
- The United States called into question the utility of the Most Favored Nations principle in a paper outlining the U.S. concerns ahead of the World Trade Organization's 14th Ministerial Conference (MC14) to be held in Cameroon.
- Supreme Court IEEPA Tariffs Ruling is anticipated early in January.

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

China Facility Registration Update

China reopened the China Import Food Enterprise Registration renewal window for facilities' registrations expiring at the end of December that were closed on October 1. ABC alerted all handlers to re-register no later than December 30, 2025. As of January 5, out of 63 handlers, we understand only 6 have approvals pending with Chinese authorities. Keith Schneller is continuing to work closely on ABC's behalf with the U.S. Food & Drug Administration and USDA/Foreign Agricultural Service, to assist with these re-registrations. Please contact Keith at kschneller@almondboard.com for additional information.

Japan Pre-Test Protocol Update

The Almond Conference in December provided an opportunity for a meeting between several members of the Japan Nut Association, ABC and California almond shippers regarding the Pre-Test Protocol which went into effect on April 1. The results of the November 4 meetings in Tokyo between ABC, USDA and Japan's Ministry of Health, Labor and Welfare (MHLW) were reviewed, along with ongoing efforts for verification of re-conditioning of non-compliant consignments at Yokohama port. JNA has submitted research to MHLW covering the verification of equipment for aflatoxin reduction and is awaiting their feedback.

For more information, please contact Julie at jadams@almondboard.com or Tim at tbirmingham@almondboard.com.

USTR Ag Negotiator Update

In mid-December, the Senate confirmed Julie Callahan as Chief Agricultural Negotiator with a 53-43 vote. Ms. Callahan was sworn-in by Ambassador James Greer on December 30, 2025.

Gulfood/Dubai in January this Year

On January 26-30, ABC will again be exhibiting at Gulfood in Dubai. This year, Gulfood is taking place in two locations. Please note that **the USA Food Pavilion has moved from the downtown World Trade Centre to a new Expo City venue** on the outskirts of the city. Gulfood is one of the largest international food expos in the world with more than 6500 exhibitors from 130 countries. We look forward to seeing old friends and meeting new contacts at the show.

**Come see us at Gulfood!
Dubai Expo City
South Hall 7, Stand 42-61**

U.S.-Mexico-Canada Agreement (USMCA) Review Update

Following the early December USMCA public hearing, USTR Jamieson Greer formally briefed the House and Senate on USMCA. Despite raising several trade concerns both countries will need to address, he did include many agricultural trade positives such as zero tariff duty rates and regulatory harmonization frameworks that support U.S. agricultural industry such as almonds.

Positive Steps by Spain on US Almond Imports

ABC along with FAS-Madrid raised concerns with Spain's Ministry of Agriculture regarding the portrayal of the U.S. almond control system in the media, highlighting the potential negative effects on perception and trade relations. The Ministry acknowledged the high quality of U.S. almonds and stressed that Spain has a clear need for U.S. products. Further, the Ministry also showed openness to address the 'next 10 shipments' issue, where Spain tests 10 consecutive shipments from a shipper following a rejection anywhere in the EU. The Ministry's commitment to finding solutions and

openness to ongoing dialogue was encouraging for future discussions. For further information, contact Abhi at akulkarni@almondboard.com

Spain Updates National Regulation on Agrifood Testing Standards

ABC recently learned that Spain's Royal Decree 562/2025, published on July 2, 2025, and effective July 3, 2025, introduced standardized testing procedures for both domestic and imported agrifood products. The Royal Decree complements EU regulations in terms of official controls – but modifies the sampling and analysis procedures at the border. The Decree limits testing to **two analyses**, with the second test result prevailing over the first. Operators may request that enough be collected for a second (contradictory) analysis at the time of inspection. Previously, Food Business Operators could request a third sample which was the decisive tie breaker in case of the first two samples resulting in contradictory results.

2026 Ag Trade Missions (ATMs) Announced

USDA announced 6 ATMS for 2026 as part of its commitment to expanding global trade markets for U.S agriculture. These missions aim to boost American agricultural exports and strengthen trade relationships in key markets:

- **Jakarta, Indonesia:** February
- **Manila, Philippines:** April
- **Istanbul, Turkey:** May
- **Australia:** August
- **Saudi Arabia:** September
- **Vietnam:** November

Upcoming Events & GTRA Activities

Jan 23-25 MEWA in New Delhi, India
Jan 26-30 Gulfood in Dubai, United Arab Emirates
April 24-26 Tuksiad Conference in Antalya, Turkey

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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.