



April 9, 2026

A Complex Export Environment...

Anyone in ag is accustomed to uncertainty – but the current situation in the Middle East is having an additional effect. Shipping lines are not calling at many of our key ports in UAE and Qatar, resulting in California almond shippers having to adjust destinations and documentation. Unfortunately, it will likely take several months for these impacts to work through the system. ABC is closely following the situation, building relationships and a diverse market portfolio to help navigate the uncertainty. The GTRA team is there to assist where we can, whether it is diving into import requirements, or identifying the right in-country contacts. Be sure to reach out with any questions or concerns!

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. Unless noted, *implementation dates have not been announced*:

- The World Trade Organization held their biannual Ministerial Conference (MC14) in Cameroon which delivered no outcomes on agriculture.
- The United States and Mexico launched bilateral technical discussions to prepare for the U.S.-Mexico-Canada (USMCA) Agreement Joint Review scheduled for July 1, 2026.
- The European Union (EU) Parliament backed a legislative proposal to lower EU tariffs on U.S. agricultural and industrial products, endorsing the next step in implementing the U.S.–EU Turnberry Agreement reached in July 2025. This includes a tariff rate quota on tree nuts including almonds.
- Australia and EU have reached a free trade agreement which will result in elimination of tariffs on Australian almonds when implemented.
- Following the Supreme Court's decision to strike down the International Emergency Economic Powers Act, the Office of the Trade Representative launched two sweeping Section 301 investigations into the structural industrial overcapacity and overproduction across 16 countries and forced labor practices across 60 countries which may lead to more tariffs.

- The United States and Ecuador signed an agreement on reciprocal tariffs which included a removal of tariffs on U.S. shelled and inshell almonds once entered into force.

ABC will be updating its tariff chart on the ABC website later this month. Also included will be a chart reflecting the pending agreements and their impact on almonds. For more information, please contact Lindsay at ltello@almondboard.com.

Japan Pre-Test: Year 2!

April 1 marked the start of the new Japan fiscal year (April 2026-March 2027). Given the positive results of the Pre-Test Protocol, Japan reduced the level of random controls to **4%** for this fiscal year. Handlers will be receiving new memorandums of understanding and an updated FAQ document before August 1.

In terms of reconditioning, the process has slowed down due to questions regarding efficacy of the sorting equipment. ABC staff is working closely with Japanese industry to understand the situation and what additional information can be provided to generate confidence in MHLW. Please contact jadams@almondboard.com for additional information.

China Update

Ahead of the first in-person Presidential meeting set for this year, China launched two trade investigations against the United States regarding green technology import restrictions and a general inquiry covering supply chains.

President Trump announced he will meet with President Xi on May 14/15. The meeting was originally scheduled for late March but was rescheduled due to the Iran War. Agriculture is one of the priority areas for discussion for both leaders.

ABC Delegation Heads to DC in April

A delegation of ABC staff and industry members will be in DC during the week of April 20-24. The annual trip is an important opportunity to update key stakeholders and government agencies on ABC initiatives. This year, meetings will also be held building relationships with relevant Embassies. Of particular focus will be meetings with USTR regarding ongoing trade negotiations, and with

USDA to gain a better understanding of upcoming staff moves and relocations. ABC also plans to meet with EPA to receive updates on production and pesticide issues. For more information regarding the trip, contact Brock at bdensel@almondboard.com.

USDA Relocation/Re-Organization

After previously announcing the planned closure and sale of the USDA South Building, USDA announced the next step in the process to relocate a significant proportion of the staff out of the National Capital Region. The headquarters of the U.S. Forest Service will be moved to Salt Lake City, Utah, relocating about 260 positions by the end of summer 2027 (about 130 positions will remain in DC). No announcements have been made yet regarding other key agencies with which the almond industry closely works (e.g. Foreign Ag Service, Ag Marketing Service, Animal/Plant Health Inspection). Additional announcements regarding other agency moves are anticipated in the coming weeks.

Iran Update

President Donald Trump issued a 60-day waiver of the Jones Act, which requires goods transported by water via U.S. ports to be carried on domestic ships, to limit rising fuel and fertilizer prices following the U.S. invasion of Iran. Please contact Lindsay at ltello@almondboard.com. A questionnaire has been sent out to handlers to gather information on the impact of the Iran war on almond exports. Consolidated information is essential, in order to respond to requests from U.S. authorities. If you did not receive the questionnaire and would like to provide input, please contact akulkarni@almondboard.com.

INC Congress in Macao

The International Nut & Dried Fruit Council is scheduled to meet May 12-14 in Macao. The meeting is anticipated to attract over 1,000 industry members. The almond panel will kick off the meeting, with a panel moderated by Clarice Turner, and Craig Duerr, Campos Brothers, providing the California almond perspective.

EU-US Trade Update

On 26 March, the European Parliament backed International Trade Committee amendments tied to the EU-US trade deal. Key revisions adopted by Parliament on 26 March:

- Suspension clause: tariff preferences can be suspended if the US exceeds the agreed 15% tariff ceiling or adds new duties or undermines the deal's objectives, among other things; or engages in economic coercion.
- Sunrise clause: lower tariffs take effect only if the US meets commitments, including reducing tariffs on EU products with <50% steel/aluminum content to no more than 15%.
- Sunset clause: the main regulation expires 31 March 2028 and could be extended only through a new legislative proposal.
- Safeguard mechanism: the Commission must monitor impacts and may temporarily suspend the new tariffs if US imports reach levels that could seriously harm EU industry.

Morocco Efforts Underway

In FY 25/26, as part of its efforts to diversify and expand market opportunities, ABC initiated activities in Morocco. Initial efforts have included engagement with the bakery institute and in-country support. In addition, ABC took advantage of a trade show in April, Marocotel, which provided an opportunity to expand contacts in the hospitality/restaurant sector.

Upcoming Events & GTRA Activities

April 20-24	ABC delegation to DC
April 24-26	Tuksiad Conference in Antalya, Turkey
April 27-30	Almond Alliance Convention, Huntington Beach
May 12-14	INC in Macao
May 13-15	UNECE, Geneva
May 28-29	MRL Conference, Sacramento

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