



August 2026

2025/26 Year in Review

Following are highlights of the significant trade and technical issues addressed by ABC this past year:

- Completion of the first full year of the voluntary aflatoxin pre-testing protocol for California almond exports to Japan. Effective April 1, the random inspection was reduced to 4%. Global Technical and Regulatory Affairs (GTRA) staff continue to work with USDA, Japan Nut Association and Japan's Ministry of Health, Labor & Welfare (MHLW) on acceptance of a procedure to allow rejected shipments to be reprocessed in Japan rather than reexported.
- Successful visits by GTRA staff to China, UAE, India, Mexico, Argentina, Ecuador, Vietnam, Thailand and various EU countries not only identified new market opportunities, but helped to expand and strengthen alliances, partnerships and engagement with key regulatory agencies.
- The U.S.–European Union trade deal was implemented on July 1, 2026, which includes a tariff-rate quota allowing U.S. tree nuts to enter the EU at a 0% duty rate. U.S. almonds will enter duty-free, rather than at 2%.
- First delegation of Moroccan food safety and customs officials was successfully hosted in California, resulting in positive alignment on the Certificate of Free Sale which will facilitate the flow of processed almonds to Morocco, a top market for California almonds.
- GTRA staff, working in tandem with USDA, FDA, and the Chinese Embassy, successfully re-registered all 66 handlers on China's GACC registration list, enabling them to continue exporting to China. In addition, China's new Decree 280 classified almonds for automatic registration renewals every five years.
- ABC applied for extension of duty-free status for California almonds entering the United Kingdom, helping preserve market access and strengthen the industry's competitiveness.

Issues Resolution and Formal Comments

Close to 100 issues were addressed this year, helping shippers access their global markets.

- Working with USDA/APHIS, consignments diverted from Dubai as a result of the Strait of Hormuz closure were cleared to enter Pakistan.
- No change in India bulk labeling requirements were reconfirmed with the Food Safety and Standards Authority.
- Working closely with the Almond Alliance, GTRA staff provided comments on various pieces of proposed regulations and trade issues, including on the U.S.-China Board of Trade and the ongoing review of the U.S.-Mexico-Canada free trade agreement.

Global Trade Strategy

GTRA staff have been moving forward with a comprehensive trade strategy based on priorities established by the ABC Board of Directors:

- Strengthening trade policy engagement with U.S. and foreign officials, international partners, and Embassies from China, the Netherlands, Germany, Spain, and Italy to advance almond priorities.
- Securing additional USDA funding through TASC and the America First Trade Promotion Program to support export market expansion, retention, and diversification.

Representing ABC and California Almonds

Participation in global organizations and technical committees assisted in mitigating trade barriers. GTRA staff represent California almonds in numerous organizations including as a member of a U.S. Ag Trade Advisory Committee, European technical committees, working groups, and scientific meetings. As the INC delegate, staff are able to represent the global nut industry though at CODEX meetings related to pesticide MRLs.

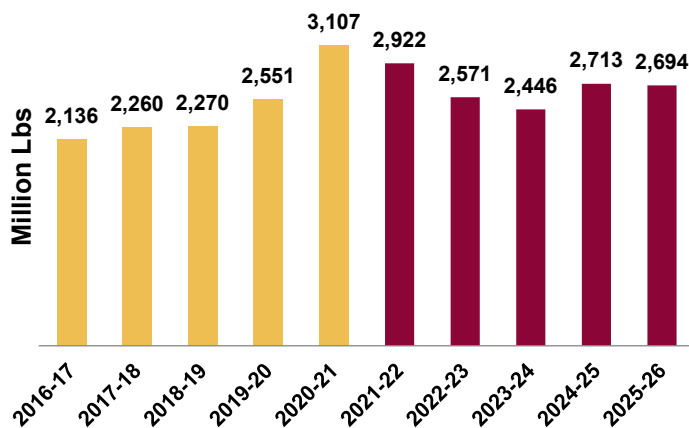


August 2026

FY 25/26 Production: 2.694 billion pounds

FY 25/26 Export Shipments: Top 10, Region, Products

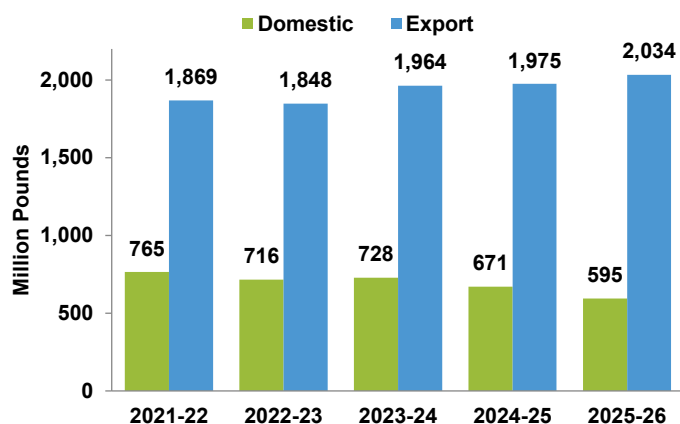
Gold Bars Are Records Years



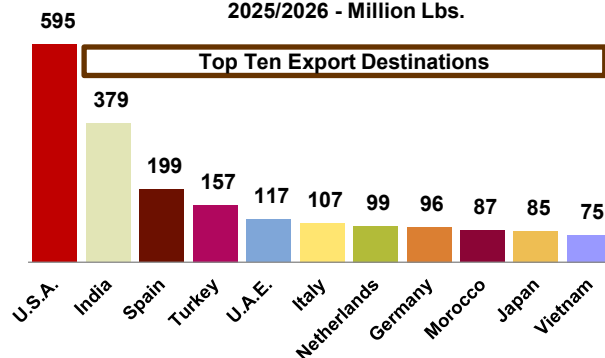
FY 25/26 Shipments: 2.63 billion pounds

Domestic 23%; Export 77%

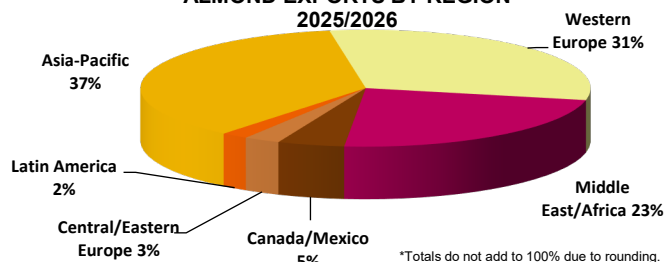
DOMESTIC AND EXPORT SHIPMENTS 2025/2026



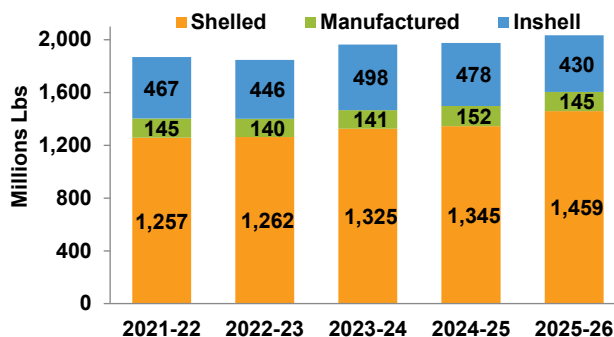
TOP WORLD DESTINATIONS 2025/2026 - Million Lbs.



ALMOND EXPORTS BY REGION 2025/2026



EXPORT SHIPMENTS BY PRODUCT TYPE 2025/2026



U.S. Agricultural Exports by Value, Calendar Year 2025

U.S. AGRICULTURAL EXPORTS BY VALUE, JAN-DEC 2025

EU-27 #3	\$14.5B	\$1,856M (13%)	Almonds #2 Ag Export
INDIA #11	\$2.9B	\$1,280M (44%)	Almonds #1 Ag Export
UAE #20	\$1.5B	\$447M (30%)	Almonds #1 Ag Export
TURKEY #17	\$2.0B	\$349M (18%)	Almonds #2 Ag Export
JAPAN #4	\$12.9B	\$268M (2%)	
CANADA #2	\$28.7B	\$257M (1%)	
VIETNAM #8	\$4.7B	\$245M (5%)	
S.KOREA #6	\$9.8B	\$207M (2%)	
MOROCCO #32	\$0.8B	\$194M (24%)	Almonds #2 Ag Export
MEXICO #1	\$30.6B	\$133M (.4%)	
CHINA/HK #5	\$9.8B	\$75M (.8%)	

■ Total US Ag Exports ■ U.S. Almond Exports

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The Global Update is a publication by the Almond Board of California (ABC). For more information, please contact the Almond Board at 209-549-8262 or regulatoryissues@almondboard.com. The information reported in this document is correct to the best of our knowledge. ABC 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.