

THE ALMOND BOARD: A TRUSTED RESOURCE

ABC acts as a trusted resource for data and industry expertise, providing stakeholders with valuable information on matters impacting the entire California almond industry.

As a Federal Marketing Order, ABC is precluded from any lobbying or advocacy activities meant to influence legislation or specific policies. However, USDA/AMS does not restrict ABC's ability to pursue many opportunities to share its expertise and fact-based information with government and other stakeholders in the U.S. and abroad.

In other words, ABC can educate with factual information based on science, research and data analysis.

Why California?

Family farms
There are 7,600 almond farmers in California: over **90% are family farms**, and nearly 70% of orchards are 100 acres or less.

High standards
California's growing environment is one of the **most regulated globally**, with strict laws protecting the environment, worker and food safety.



Ideal climate
California is **1 of 5 Mediterranean climates** on Earth, essential to growing almonds.

GLOBAL TRADE STRATEGY

- Harmonized, unimpeded market access is critical – ABC drives for recognition that almond practices align with food safety, processing and environmental priorities.
- ABC's global trade strategy focuses on both tariffs and technical barriers to trade, particularly in new, developing markets.
- Trade policy priorities and strategies synergize with demand building initiatives, such as market assessments in Morocco/North Africa, Brazil, Indonesia and Turkey.
- In 2024, almonds were the #2 ag export to the EU (\$1 billion) and Morocco (\$ 181 million), and the #1 ag export to UAE (\$126 million) and India (\$943 million) – accounting for 33% of all U.S. ag exports to India.
- In 2025, India reduced GST on almonds from 12% to 5%.
- In April 2024, the UK lifted tariffs on all raw almonds for an initial period of two years.
- Once finalized, almonds could benefit from proposed bilateral agreements with the EU, Indonesia, and Philippines.
- Trade agreements negotiated by EU and Australia put California at a disadvantage in key export markets.
- Australia benefits from favorable tariffs in China (0% duty) and India (50% of the normal MFN tariff levels for 34,000 MT).
- ABC meets regularly with U.S. trade negotiators and other U.S. government field offices, providing technical information on the industry's priorities and importance of market access for California almonds.



EXPORT TECHNICAL ISSUES

- ABC is a globally trusted resource to government authorities and the industry for wide-ranging, fact-based information concerning agricultural practices and trade flows.
- Technical Barriers to Trade range from pesticide MRLs to labeling to certification requirements – all of which can disrupt almond shipments.
- ABC engagement with U.S. agencies has resulted in streamlining procedures for U.S. goods return, and adoption of pre-testing protocols for almonds exported to Japan, reducing import inspections to less than 5%.
- Since 2022, ABC staff helped 70 handlers finalize registration of their facilities for exports in compliance with China's Decree 248 food facility registration law, avoiding significant trade disruption.
- ABC helped resolve more than 50 issues for industry and trade stakeholders, ranging from shipment detentions, to providing appropriate fact sheets and reference materials.
- Technical advisors and experts in key markets are used to keep ABC updated on emerging technical issues or tariff barriers.
- Almond industry priorities are amplified by ABC's participation in global organizations and ag coalitions addressing trade impacts, grade standards, import procedures, contaminants, pesticides, and labeling.
- Since 2020, ABC has submitted more than 35 comments to U.S. and global authorities that highlight the California almond industry's production practices, processing standards, and trade impact.

PESTICIDES AND PEST MANAGEMENT

- U.S. and California regulatory systems for approving, monitoring and reporting pesticide use are amongst the most rigorous in the world.
- Successful pest management contributes to wholesome nuts as well as efficient use of water and other inputs.
- ABC pursues a holistic pest management strategy that includes research, outreach to growers & handlers, and engagement on policy issues in conjunction with other collaborators.
- Since 1973, ABC pest management research has provided almond growers with science-based, Integrated Pest Management (IPM) solutions for many pest problems, balancing the use of nonchemical and chemical tactics to manage pests effectively and safely.
- IPM solutions developed with ABC funding support include pheromone-based mating disruption for key insect pests, beneficial thresholds for mites, and assessing the value of cover crops for weed management and soil health.
- ABC engages with registrants, industry, and government authorities to encourage a risk-based, harmonized approach to setting and evaluating global pesticide Maximum Residue Limits (MRLs). In export markets, MRLs that are not science-based can result in trade disruption.
- Market basket surveys in Europe and the U.S. show negligible pesticide residues associated with almonds and tree nuts.
- 51% of almond farms utilize bird boxes and perches to aid in pest management and support biodiversity.

CLIMATE SMART AGRICULTURE

- The California almond industry has been an early investor in research on climate smart agriculture including Whole Orchard Recycling, the largest single practice for adding carbon into agricultural soils, planting cover crops, composting, fertilizer, emissions, and nitrogen and water management.
- Grower-funded research and outreach together with market incentives drove a fourfold adoption of cover crop planting in just three years.
- ABC is exploring grower access to ecosystem services markets for practices that store carbon, foster biodiversity, and improve water quality and quantity.
- The almond industry has long worked to reduce impacts on air quality from dust; low-dust harvesting equipment reduces PM2.5 and PM10 dust emissions on average 50%.¹
- Growers and handlers have been adding solar power to their operations, along with starting to use zero-emissions vehicles such as forklifts and electric tractors. 38% of almond farms utilize solar as an onsite form of renewable energy.
- 42% of almond farms grow cover crops between tree rows - either intentionally planted or maintaining resident cover - which supports soil health, water holding capacity, and biodiversity.

Growing more than *almonds*

42% of California almond orchards (685K acres) **maintain cover crops** between tree rows.



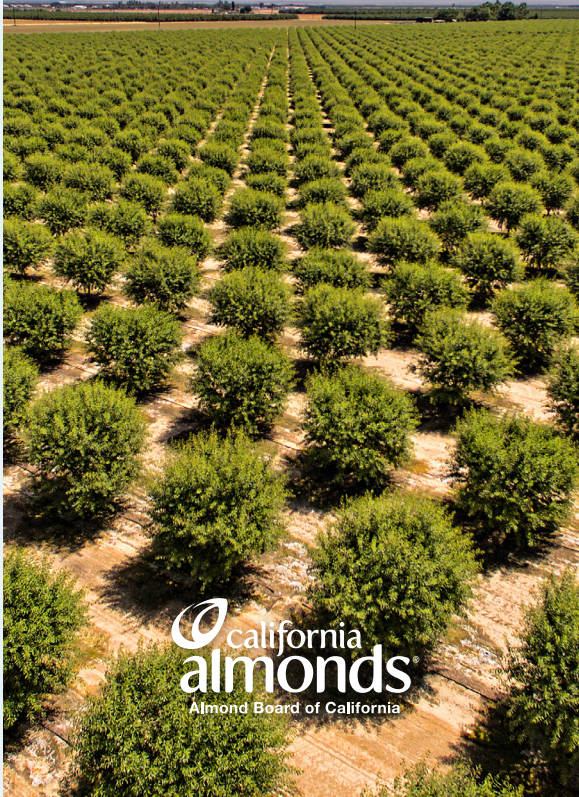
86% of all U.S. **bee-friendly certified** farms are almond farms.



- Almond orchards build biodiversity. Over 85% of U.S. bee-friendly certified farms are almond farms.
- 55% of almond farms utilize compost, supporting soil health and improving water holding capacity.

1. El Jirje N. Baticados et al. Particulate matter emission factors using low-dust harvesters for almond nut-picking operations. Journal of the Air & Waste Management Association. 2019.
2. California Almond Stewardship Platform. Regenerative Analysis. Dec. 2025

KEY ISSUES & FAST FACTS 2025



California almonds play a significant role in the overall health and well-being of our communities, consumers, environment, and economy. With more than 1.38 million bearing acres statewide, the California almond industry recognizes its role as a leader in California agriculture and global almond production, aiming to make life better by what we grow and how we grow.

California almonds are ...

- #1 U.S. specialty crop export.
- California's #1 ag export with an export value of \$5 billion in 2024 (USDA ERS).
- California's 2nd largest commodity with a 2024 value of \$5.6 billion (CDFA).
- Around 80% of global almond production.
- Over 70% export, shipped to more than 100 countries, after meeting 100% domestic demand.
- Creating more than 104,000 California jobs and contribute \$11 billion to California GDP (UC Agricultural Issues Center).



- Over 90% family farms – nearly 70% farming 100 acres or less.
- #1 nut in global new product introductions since 2007.

1. UC Agricultural Issues Center

For additional information on key issues impacting the California almond industry, please contact regulatoryissues@almondboard.com

HIGHEST STANDARD OF PRODUCTION & QUALITY

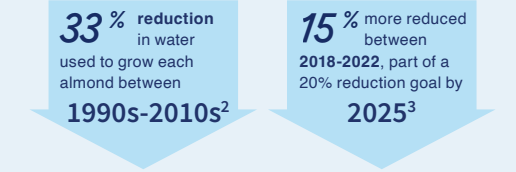
- California almond practices, combined with California and U.S. regulatory requirements, have been benchmarked at Silver level to the Sustainable Ag Initiative's (SAI) Farm Sustainability Assessment (FSA) framework.
- California almonds are the only U.S. commodity recognized under the EU's Pre-Export Certification (PEC) regulation, specifying < 1% inspection on import.
- California regulations for pesticide approval, usage, reporting and monitoring are among the strictest in the world.
- The industry's food safety practices are recognized by FDA as compliant with the grower requirements under the Produce Safety provisions of the Food Safety Modernization Act (FSMA).
- The California Almond Stewardship Platform (CASP) grower self-assessment tool is one of the largest data sets on grower practices, with almost 25% of almond growers directly assessed and representing half of the industry acres.
- California almond practices within the California Almond Stewardship Platform (CASP), combined with rigorous California and U.S. regulatory requirements, have benchmarked the CASP program at Gold level to the Sustainable Ag Initiative's (SAI) Farm Sustainability Assessment (FSA) framework.
- While growers are investing in these practices, low profitability in recent years means that incentive programs, cost-share grants, and other economic programs enable continued progress.

- Click the QR code to see more information about how California almonds are grown.



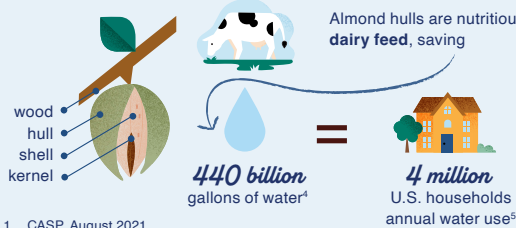
WATER EFFICIENCY AND USE

- California's Central Valley is one of 5 regions in the world with the Mediterranean climate needed to grow almonds.
- 88% of almond orchards use efficient micro-irrigation, allowing precision irrigation based on tree/soil needs and weather conditions.¹



- ABC's Introduction to Groundwater Recharge guide has been cited as a model resource for growers seeking to do on-farm recharge.
- On-farm groundwater recharge increased 90% between 2017 and 2023 in the San Joaquin Valley, due to efforts such as those of the Almond Board.⁴
- While significant water access and infrastructure challenges remain to successfully implementing groundwater recharge at scale in California, 12% of almond farms utilize the practice.

Four crops for every drop

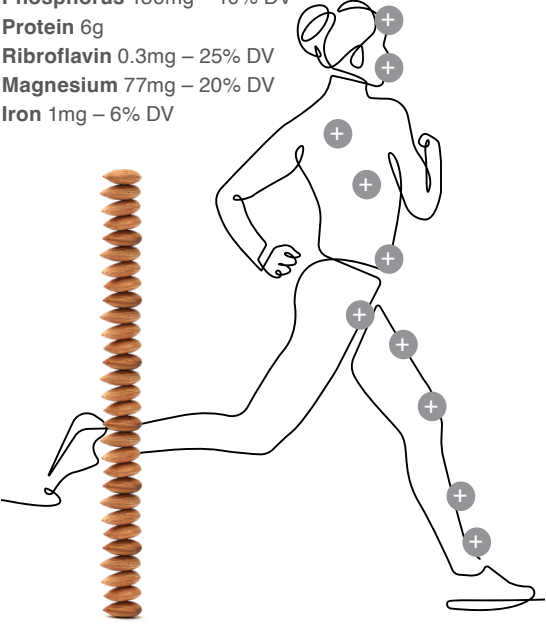


1. CASP. August 2021.
2. University of California, 2010. Food and Agriculture Organization of the United Nations, 2012. Almond Board of California, 1990-94, 2000-14.
3. CASP Almond Orchard 2025 Goals MidPoint, SureHarvest, November 2022
4. PPIC: Replenishing Groundwater in the San Joaquin Valley: 2024 Update.
5. U.S. Environmental Protection Agency. How we use water, 2023. Average US household uses 109,500 gallons per year.

NUTRITIONAL POWERHOUSE

Head-to-Toe Almond Health Benefits

Vitamin E 7.3mg – 50% DV
Calcium 76mg – 65% DV
Monounsaturated Fats 9g
Potassium 200mg – 4% DV
Fiber 4g – 14% DV
Phosphorus 136mg – 10% DV
Protein 6g
Riboflavin 0.3mg – 25% DV
Magnesium 77mg – 20% DV
Iron 1mg – 6% DV



Spanning three decades, almonds have over 200 peer-reviewed publications on their nutrition profile and health benefits. Research from top scientists and universities globally has uncovered that almonds may help support heart health, gut health, weight management, skin health, exercise recovery and more.

ZERO WASTE

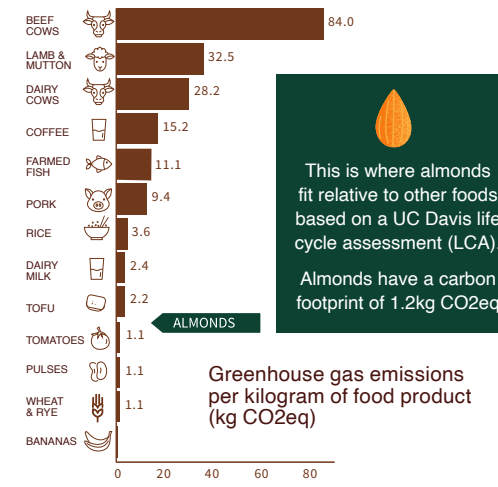
- Almond hulls, shells and woody biomass are currently reused in animal feed and bedding; commercial technologies are pursuing reuse as feedstocks for bioplastics, bioenergy, clothing fiber, soil amendments, food and cosmetic ingredients.
- Less than 1% almonds are thrown out, thanks to their two year shelf life.¹
- Efforts are underway to obtain GRAS status for almond hulls for food applications, adding fiber and phytonutrients.
- Market access for almond hull pellets/cubes has been finalized in China.
- A renewable solution for the trees at the end of their productive lives is Whole Orchard Recycling, which involves grinding up orchards and incorporating the woody biomass into the soil. Published research indicates that over time this practice increases yields, returns nutrients to the soil, increases water infiltration and storage², and sequesters 2.4 tons of carbon per acre in the soil.³
- In the space of only a few years, this practice has been adopted on more than 50% of replanted orchards.⁴



1. Jean Buzby, et al. Food Loss Data help inform Food Waste discussion. USDA, ERS. June 2023.
2. Emad Jahanazad, et al. Orchard recycling improves climate change adaptation and mitigation potential of almond production systems. PLoS ONE. March 2020.
3. Seth Wynes, et al. Climate mitigation gap: education and government recommendations miss the most effective individual actions. Environmental Research Letters. 2017.
4. CASP. November 2023.

ALMOND LOW CARBON FOOTPRINT

- Trees store carbon in their wood and roots as they grow. Almond trees store one of the highest amounts of carbon, 18 metric tons, per acre. That amounts to 30 million metric tons of carbon sequestered in all California almond acreage.



This is where almonds fit relative to other foods based on a UC Davis life cycle assessment (LCA). Almonds have a carbon footprint of 1.2kg CO2eq

- Carbon stored in all the almond trees growing in California in 2022 is equivalent to the annual emissions of 24 million cars.¹



1. California Air Resources Board. An Inventory of Ecosystem Carbon in California's Natural & Working Lands. 2018 Edition (Updated 2020), p. 41. U.S. Environmental Protection Agency. Greenhouse Gas Equivalencies Calculator. July 2023.