GLOBAL UPDATE

California almonds
Almond Board of California

October 2026

EU Delegation Visit



From September 13–18, 2026, the Almond Board of California hosted a delegation of EU (Spain, Italy, Netherlands, Poland) and UK government officials for an educational tour of California's almond industry. The visit was funded through a Technical Assistance for Specialty Crop (TASC) grant from USDA and combined technical briefings, orchard and processing-facility tours, laboratory and handler visits, an industry roundtable, and a Port of Oakland tour to provide an end-to-end view of almond production, food-safety controls, handling practices, and export logistics.

The visit was highly successful in increasing delegates' awareness of California almond production and handling practices. Through firsthand observation of orchard operations, harvest activities, hulling and shelling, sorting, grading, laboratory testing, and handler facilities, delegates gained a clearer understanding of the coordinated controls applied throughout the supply chain to support almond quality and food safety. In addition, ABC staff provided an in-depth briefing on the Pre-Export Check (PEC) program that included PEC database demo.

The combination of technical presentations, site visits, and discussions with growers, handlers, laboratory personnel, industry representatives, and regulators helped translate complex processes into practical understanding. Delegates left with greater confidence in the industry's production and handling systems, including its safeguards for aflatoxin prevention, pre-export testing, traceability, and export readiness. This visit allowed ABC to create a foundation for continued regulatory cooperation while increasing the industry practices awareness among the delegates.

Many thanks to all industry members who contributed to the success of the trip. For more information, please contact Abhi at akulkarni@almondboard.com

EU PPWR

The **EU Packaging and Packaging Waste Regulation (PPWR)** established new EU-wide requirements for packaging placed on the EU market, including primary, secondary, and transport packaging. For almond exporters, the key near-term priority is to prepare documentation on packaging materials, food-contact status, supplier declarations, heavy metals and PFAS compliance, recyclability, recycled content, and packaging weights/dimensions.

Beginning **August 12, 2026**, EU buyers and importers may request supporting documentation, while broader recyclability, recycled-content, minimization, and empty-space requirements phase in mainly from **2030** onward. ABC has created a guidance document to assist the industry in PPWR compliance and can be found here: EU-PPWRGuidanceFactsheet_GTRA_September20264pg. Additionally, ABC will host a session dedicated to PPWR during the annual Almond Conference on December 10 from 9-10 AM.

For any PPWR-related questions, please contact Abhi (akulkarni@almondboard.com)

DC Delegation Wraps Up

ABC held its Fall DC "fly-in" on October 6-9. The trip provides an opportunity for a focused itinerary to address trade concerns, emphasize the importance of unfettered exports, and update key government stakeholders on crop conditions. An important point was that while the value of the almond crop has increased, growers continue to face significant economic pressures related to cost of production, energy and land values. This year, meetings included the USDA/Foreign Ag Service, USDA/Ag Marketing Service, the EU Mission to the

U.S., the U.S. Trade Representative office, Commerce and the U.S. National Security Office.

India Visit

ABC staff will be in India October 12-16 for extended discussions related to ingredients as well as meetings with manufacturers and agency partners. Plans also include meeting with USDA/APHIS representatives, to clarify questions related to labeling and fumigation requirements in Pakistan.

Prop 65

Several industry members have expressed concerns about a rising number of 60 day notifications related to Prop 65 and contaminants. ABC is working to identify technical experts who can assist in addressing these notifications, as well as the applicability of exemptions related to naturally occurring compounds. Please contact Julie at jadams@almondboard.com for more information.

U.S.- China Board of Trade

Following the September meeting between President Trump and President Xi, the U.S.-China discussions produced several outcomes with potential implications for the almond industry. The Busan trade truce has been extended until January 10, 2027, with the maximum tariff on U.S. almonds currently at 35%. The two countries also moved to operationalize the Board of Trade, and almonds—including shelled, inshell, paste, and flour—are included on the official list of non-sensitive products intended to receive more favorable tariff conditions. In addition, an agricultural working group has been formed with a remit to discuss tariff and non-tariff barriers affecting agricultural trade.

Further details are still pending on the specific tariff reductions and implementation date. For more information please contact Lindsay at ltello@almondboard.com

Trade Updates

There have been a number of recent trade developments that ABC is following:

- President Trump nominated Greg Ibach, former USDA Under Secretary for Marketing and Regulatory Programs, to serve as Under Secretary for Trade and Foreign Ag Affairs, a key role overseeing U.S. agricultural trade and export grant programs.
- The G20 Trade Ministers convened in Milwaukee, Wisconsin to discuss key trade issues including weaponization of food, forced labor policy, structural excess capacity and production, and World Trade Organization reform.
- USDA, FDA, the Japan MHLW and ABC will be meeting at the end of November for the second annual review of the Pre-Test Program. About 95% of consignments shipped to Japan are under the pre-test protocol, with an import testing rate of 4%.

Upcoming Travel and Events

Oct 12-16	ABC meetings in India
Oct 15-16	Frucom Conference, Brussels
Nov 9-13	USDA Vietnam trade delegation
Nov 12-13	Waren Verein Conference, Hamburg
Nov 18-19	USAEDC, Baltimore
Dec 8-10	The Almond Conference, Sacramento

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