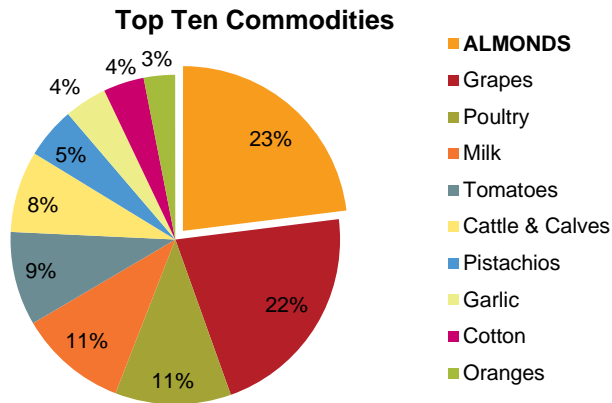


Fresno County Facts

Agriculture is the primary industry in Fresno County. The value of agricultural commodities in 2013 was over \$6.4 billion, a slight decrease from 2012.



- Almonds added \$1.1 billion to the county's economy in 2013
- Almonds ranked first in agricultural production with over 162,000 producing acres
- There are 13 almond handlers in Fresno County (ABC)
- There are 4 huller/shellers in Fresno County (AHPA)

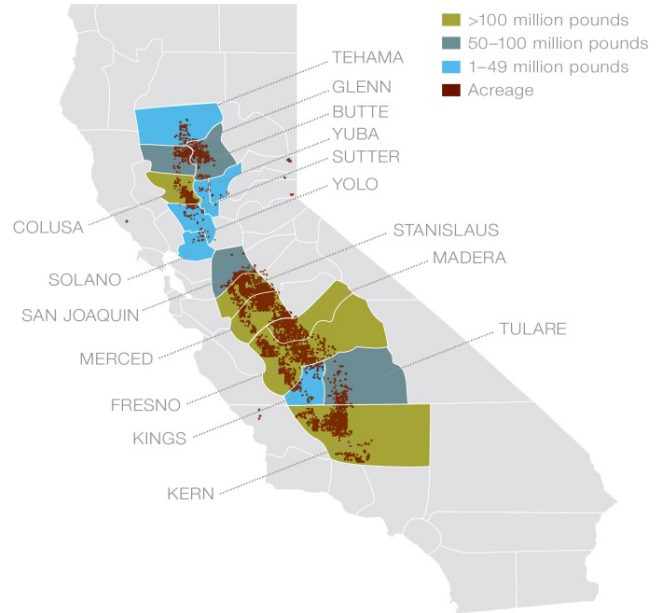
Source: Fresno County 2013 Agricultural Crop Report

2012 Agriculture Census

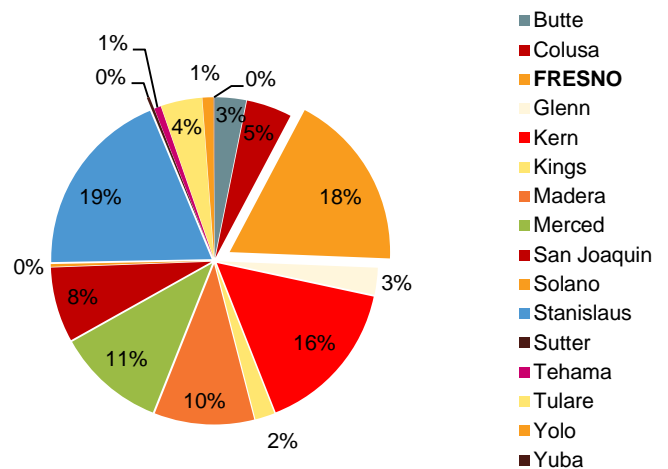
The U.S. Department of Agriculture National Agricultural Statistics Service completes a comprehensive summary of agricultural activity for the United States and for each state and its counties every five years. Per the 2012 Ag Census:

- There are approximately 5,683 farms in Fresno County
- Average farm size is 303 acres, however, 60 percent of farms are smaller than 50 acres
- Farming is the primary occupation for 60 percent of farm operators

Almond Production by County



Fresno County ranks second in almond production, providing 18% of the entire California crop value



California Almond Facts

Almonds are produced in the central region of California, providing delicious, wholesome, versatile almonds and almond products to some 90 countries worldwide.

Almond Board of California

Established in 1950, the Board administers a grower-enacted Federal Marketing Order under United States Department of Agriculture supervision which operates under a board/committee structure similar to a non-profit industry association.

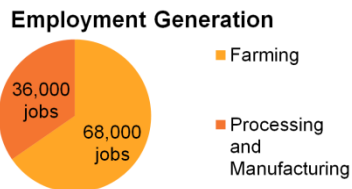
The Board represents approximately 6,500 almond growers and 100 almond handlers (processors). According to USDA's 2012 Ag Census, 90% of almond farms are family owned and the majority of growers and handlers are multigenerational.

- The Board's **mission** is to make **California Almonds essential to customers and consumers worldwide through innovative research, market development and industry support**
- The Board's **vision** is to bring **great taste, health, and vitality to people around the world through the enjoyment of California almonds**
- The Board is financed through assessments; funds support research, quality/food safety programs, and market demand growth around the world

The Economics of Almonds

California Almonds are

- California's #3 agricultural crop valued at \$4.347 billion in farmgate value in 2012. Reported value for 2013 is \$6.4 billion. (*National Agricultural Statistics Service, NASS*)
- The almond industry generates more than \$21 billion in economic revenue and directly creates more than \$11 billion of added value (the measure of California's Gross State Product)
- The whole almond industry generates about 104,000 jobs statewide
- Over 97,000 jobs are generated in the Central Valley of California - vital in a region that has long had high unemployment



(Source: *The Economic Impacts of the California Almond Industry*; UC Agricultural Issues Center)

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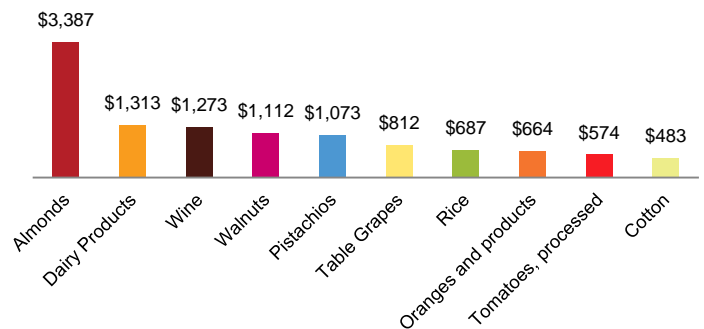
Almonds Around the World

In FY 2013, California Almond growers produced the second largest crop on record at 2.01 billion pounds.

- 2014 acreage is forecast at 860,000 bearing acres (*National Agricultural Statistics Service, NASS*)
- 2014 production is estimated at 2.10 billion pounds, up 4.5% from last year's crop (*NASS*)
- 2012 exports of \$3.4 billion created 47,000 jobs (*USDA ERS Ag Trade Multiplier*)

Top Ten California Agricultural Exports 2012 (million \$)

Source: California Department of Food and Agriculture



California produces about 80% of the world's almonds and 100% of the U.S. commercial supply. Almonds are California's #1 agricultural export and the US #1 specialty crop export.

- 67% of the crop is exported to more than 90 countries worldwide.
- Domestic shipments reached a new record in FY 2013/2014 at 642 million pounds, up 9% from 2012/2013
- 2013/2014 was the second largest export year on record with 1.29 billion pounds shipped
- Almonds were the leading nut introduced in new products worldwide in 2012 for the seventh consecutive year (*Innova Global New Products Report, Sterling-Rice Group, 2013*)

