THE 2026 ALMOND

ALMANAC

ANNUAL REPORT



A BOLD NEW CAMPAIGN
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california almonds®

CONGRATULATIONS, CLASS OF 2026!



Rebekah Burrows, Advancing Eco Agriculture | GGI Farms; Grace Fales, Baugher Ranch Organics; Daniel Frea, Hanson Bridgett LLP | Frea Farms; Austin Jackson, Blue Diamond Growers; Andrew Jensen, Crop Syndicate; Julian Jimenez, Pomona Farming LLC; Natalie Kidd, Kidd Farms; Catherine Machado, Manulife Farmland Management Services; Madison Martella, Monte Vista Farming Company; Prabh Monder, Monder Farms; Connor Pate, Belkorp Ag LLC; Alexus Powell-Crow, Grow West; Noah Riley, Kula Bio; Hyeong Shin, HS Ventures; Orlando Tapia, Corteva Agriscience; John Unzueta, Cache Creek Foods LLC; Alyssa Valdez, Pistachio Processing; James Williamson, PGIM Real Estate

Established in 2009, the Almond Leadership Program (ALP) is a yearlong initiative designed to inspire and equip members of the almond community with the skills to lead a dynamic and evolving industry. Since its inception, nearly 270 participants have graduated from the program, with more than 80 going on to serve on Almond Board of California committees or the Board of Directors.

ALP is also committed to developing future agricultural leaders, having contributed more than $390,000 to California FFA scholarships. The Class of 2026 raised nearly $40,000 through golf tournaments in Sacramento and Madera. Congratulations to the Class of 2026—we look forward to seeing your continued impact on the industry.

Almond Leadership PROGRAM

california almonds
Almonds.org

WELCOME TO *THE ALMOND ALMANAC*

WITHIN THESE PAGES YOU WILL FIND A COMPREHENSIVE OVERVIEW OF CALIFORNIA ALMONDS—THE STATE'S #1 CROP BY ACREAGE, #1 AG EXPORT, #2 CROP BY VALUE AND THE #1 SPECIALTY CROP EXPORT IN THE U.S.

For almond farmers and processors, this is your annual accounting of how your investment in the Almond Board of California (ABC) is leveraged to build long-term demand for California almonds around the world, as well as protect that demand from erosion due to growing challenges. It also provides an overview of the ABC-funded research that underpins the continuous improvement efforts of the California almond community.

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The statistical analyses found in the *Almanac* are prepared on a crop-year basis, spanning August 1 through July 31, and include both current and historical information. The statistical content is compiled using handler forms required by the industry's Federal Marketing Order. Additional data, including crop estimates and farm price, are supplied by the USDA National Agricultural Statistics Service, Pacific Region Field Office.

ABOUT

THE ALMOND BOARD OF CALIFORNIA WAS FORMED AS A FEDERAL MARKETING ORDER MORE THAN 75 YEARS AGO IN 1950. TODAY, IT PROMOTES CALIFORNIA ALMONDS GLOBALLY, ENSURES FOOD SAFETY AND SUPPORTS RESEARCH.

The Almond Board programs are funded by a per-pound assessment on all California-grown almonds. Working with Board-approved committees, the Board of Directors directs funds and initiatives in each program area.

BOARD OF DIRECTORS



Front row (left to right): Christine Gemperle, Tobin Barth, George Goshgarian Jr. (vice chair), Raj Samran. Back row (left to right): Lucas Van Duyn, Mel Machado, Cathy Marsh, Joe Gardiner, Alicia Rockwell, Dinesh Bajaj, Brandon Rebiero, Patrick Anderes, Maya Erwin. Not pictured: Paul Ewing, Brad Klump, Garrett Bloemhof, Bob Silveira (chair), Justin Morehead, Chad DeRose, Kabir Tumber.

HOW THE BOARD WORKS

The Board of Directors consists of 10 volunteer members, with five growers and five handlers elected annually by California almond growers and handlers. Each Board member also has an alternate. The Board elects its chair and vice chair, sets strategic direction, establishes policy and recommends budgets and programs to the Secretary of Agriculture for approval. Committees oversee program development and performance, while Almond Board staff administer and execute approved initiatives.

DID YOU KNOW?

Every five years, the USDA holds a referendum to continue the Federal Marketing Order. In December 2024, 90.5% of voting growers—representing 93.3% of almond volume—supported its continuation.

GET INVOLVED

In addition to the Board of Directors, nearly 200 active almond industry members serve on committees and workgroups to further the work of the Almond Board. Volunteering with the Almond Board helps ensure almonds remain an essential crop in California and are demanded by consumers around the world.



ATTEND A MEETING

ANY INDUSTRY MEMBER IS WELCOME AND ENCOURAGED TO ATTEND COMMITTEE AND BOARD MEETINGS. USE QR TO SEE CALENDAR OF EVENTS.

JOIN A COMMITTEE

APPLICATIONS ARE ACCEPTED YEAR-ROUND, WITH NEW APPOINTMENTS IN AUGUST. USE QR TO APPLY NOW.

COMMITTEE STRUCTURE



ADDITIONAL GROUPS FOR INDUSTRY MEMBERS TO PARTICIPATE IN INCLUDE THE BIOMASS WORKGROUP, ENVIRONMENTAL STEWARDSHIP WORKGROUP, INGREDIENT INNOVATION WORKGROUP, PRODUCTION STEWARDSHIP WORKGROUP AND ORGANIC ADVISORY PANEL.

DID YOU KNOW?

The Almond Board is a Federal Marketing Order, administered under the USDA, focused on two main areas: Quality Regulations and Research and Promotion. It is important to note that the Almond Board is not involved with, and is expressly prohibited from, setting field and market prices.

LEARN MORE

FIVE BOLD INITIATIVES

TO POSITION CALIFORNIA ALMONDS FOR LONG-TERM SUCCESS, THE ALMOND BOARD OF CALIFORNIA IDENTIFIED FIVE BOLD INITIATIVES THAT FOCUS INDUSTRY RESOURCES ON THE AREAS WITH THE GREATEST POTENTIAL FOR IMPACT. Together, these priorities provide a roadmap to strengthen demand, expand market opportunities, enhance the industry's reputation and support grower success.

1. **REIGNITE THE U.S. MARKET**
2. **TEACH THE WORLD WHAT CALIFORNIA ALMONDS CAN DO**
3. **STRATEGICALLY OPTIMIZE THE GLOBAL MARKET PORTFOLIO**
4. **ADVANCE INDUSTRY REPUTATION**
5. **SUPPORT GROWER VIABILITY**

STRATEGIC PRIORITIES

IN JUNE 2024, THE BOARD OF DIRECTORS ADOPTED A NEW STRATEGIC PLAN FOCUSED ON OPPORTUNITIES TO DRIVE INDUSTRY GROWTH. FOLLOWING THE BOARD'S DIRECTION, THE ALMOND BOARD ADJUSTED ITS PROGRAMS, WITH MORE CHANGES PLANNED TO SUPPORT THE FOLLOWING FOUR STRATEGIC PILLARS:

DRIVE GLOBAL DEMAND FOR CALIFORNIA ALMONDS: Drive value by investing in programs and research that meaningfully differentiate almonds across short- and long-term horizons.

MAXIMIZE INDUSTRY EFFICIENCY: Provide industry members with information and resources that outline options available to maximize efficiency, profitability and overall value for their operation.

SUPPORT A FAVORABLE TRADE AND REGULATORY ENVIRONMENT: Leverage data, relationships and initiatives to help the industry produce, ship and market almonds with minimal disruption or obstacles.

OPTIMIZE ALMOND BOARD VALUE: Align exemplary leadership, engagement and efficiency at all ABC levels to deliver on strategic goals and industry priorities.

PROGRAMS + BUDGET

ALMOND BOARD OF CALIFORNIA PROGRAMS ARE FUNDED BY AN ASSESSMENT PLACED ON EVERY POUND OF ALMONDS GROWN IN CALIFORNIA. WORKING WITH BOARD-APPROVED COMMITTEES, THE BOARD OF DIRECTORS APPROVES THE BUDGET ALLOCATION FOR EACH PROGRAM AREA. HERE ARE A FEW KEY HIGHLIGHTS THAT SUPPORT THE FIVE BOLD INITIATIVES:

DRIVING GLOBAL DEMAND FOR CALIFORNIA ALMONDS

A new agency partner is bringing fresh thinking to U.S. and European programs, including a new U.S. campaign launching in early 2027.

In India, *Superfood for a Super You* is positioning California almonds at the intersection of modern wellness and cultural relevance, supported through high-impact consumer moments such as Indian Premier League and Diwali.

California Pride celebrates the people, place and values behind California almonds, strengthening the connection between consumers and where their almonds come from.

Health and wellness remain foundational to almond demand, with continued investment in nutrition science and health professional engagement.

SUPPORTING A FAVORABLE TRADE AND REGULATORY ENVIRONMENT

ABC secured USDA America First Trade Promotion Program (AFTPP) funding to support demand-building programs.

Partnered with the Almond Alliance on regulatory priorities affecting California almonds.

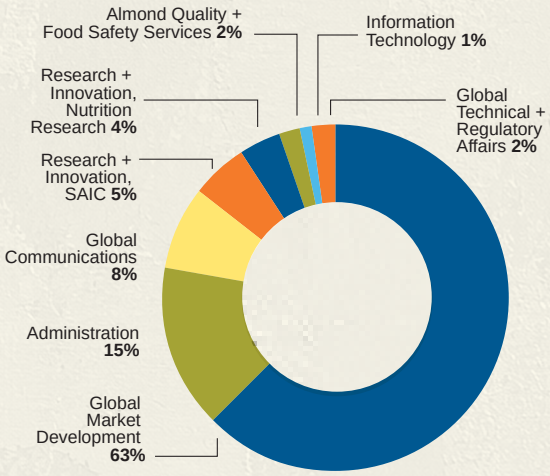
Provided information and education to government and customs officials to support understanding of import requirements, inspection processes and trade procedures in markets including Japan, Morocco, Pakistan, Turkey and China.

Provided education and information related to tariff impacts and trade conditions, including EU and China.

MAXIMIZING INDUSTRY VALUE

ABC-funded research supports control of new pest threats: *Carpophilus* beetle, red leaf blotch and roof rats. It also developed pheromones for leaffooted plant bugs, technology now commercially available in traps.

Generally Recognized As Safe (GRAS) confirmation of almond hull powder (AHP) opens the door to food uses for almond hulls, creating a pathway to transform a historically low-value coproduct into safe, functional food ingredients. More broadly, it establishes a foundation for developing a new category of hull-derived ingredients—creating circular value and putting one of almond production's largest coproduct streams to higher-value use.



PROGRAM BUDGET ALLOCATION

fiscal year 2025/26*

*Totals may not add precisely due to rounding.

DID YOU KNOW?

More than **75%** of the total Almond Board budget goes toward demand building. This work is covered under the areas of Global Market Development, Global Communications, Nutrition Research and Global Technical + Regulatory Affairs.

DATA DRIVEN

RESEARCH FUNDED BY THE ALMOND BOARD OF CALIFORNIA IS THE FOUNDATION FOR DRIVING GLOBAL DEMAND.

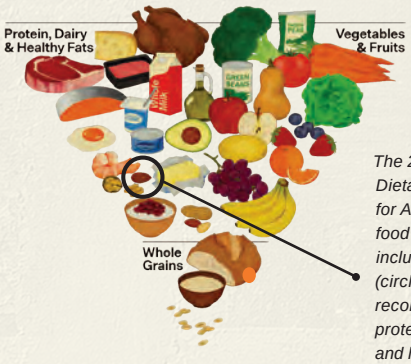
From audience insights and the impact of almonds on human health to the industry's strong environmental stewardship story, data on the benefits of almonds is essential to our work and the industry's success.

TO DRIVE DEMAND, OPTIMIZE TRADE AND REGULATORY CONDITIONS AND INCREASE FARM RETURNS, THE ALMOND BOARD SUPPORTS RESEARCH ACROSS FIVE KEY AREAS.

- Quality + Food Safety
- Coproducts + Biomass
- Agronomic + Environmental
- Almond Nutrition
- Consumer + Market Research

NUTRITION RESEARCH

AS CONSUMER PRIORITIES EVOLVE, THE ALMOND BOARD HAS RESHAPED ITS APPROACH TO NUTRITION RESEARCH BY INCORPORATING INNOVATIVE TECHNOLOGIES AND ENGAGING NEW AUDIENCES TO SHOWCASE THE BENEFITS OF ALMONDS.



The 2025–2030 Dietary Guidelines for Americans food guide includes almonds (circled) among recommended protein foods and healthy fats.

RESEARCH HIGHLIGHTS

A first-of-its-kind study showed that eating almonds improved multiple measures of cognition and metabolic health among Indian adults with prediabetes.[1] This breakthrough research provides locally relevant evidence in a key global market, unlocking new opportunities to drive demand.

Ongoing research is investigating if applying almond oil topically can improve the appearance of facial wrinkles and if eating almonds can improve wrinkles, acne and markers of skin collagen breakdown. These studies have the potential to strengthen almonds' health and beauty story and create new opportunities to expand the use of almond oil.

The Nutrition Research Committee funded research to investigate almonds as a gold-standard companion food for people taking GLP-1 medications.

NUTRITION AFFAIRS HIGHLIGHTS

ABC's Nutrition Affairs program increased global awareness of almonds' health and environmental benefits and strengthened almonds' credibility with influential organizations through targeted strategic briefings with 30+ key opinion leaders and events at eight leading health conferences worldwide.[2] Decades of research, combined with efforts to get that research into the hands of decision-makers, have helped secure almonds' inclusion in nutrition recommendations, including those from the American Heart Association®.

The 2025–2030 Dietary Guidelines for Americans[3] recommend nuts as a nutrient-dense food choice, with almonds included among the nuts recommended, reinforcing the role almonds can play in a healthy dietary pattern.

1. Gulati, Seema et al. "Effects of 24-Week Almond Supplementation on Executive Function and Processing Speed in Middle-Aged Asian Indians with Prediabetes: An Open-Label Randomized Controlled Trial." *The Journal of Nutrition* vol. 156,5 (2026): 101484. doi:10.1016/j.tjnut.2026.101484.
2. Conferences: International Congress of Nutrition, European Association for the Study of Diabetes, EAT Food Forum, Food and Nutrition Conference and Expo, Healthy Kitchens Healthy Lives, American Heart Association EPI Lifestyle, Dr. Mohan's International Diabetes Update, International Diabetes Experts Consortium.
3. U.S. Department of Health and Human Services and U.S. Department of Agriculture. (2026). *Dietary Guidelines for Americans, 2025–2030* (10th ed.). Washington, DC: U.S. Government Printing Office. Available from RealFood.gov.

DATA ON HOW RESEARCH RESONATES WITH CONSUMERS



ACROSS MAJOR MARKETS, ALMONDS CONTINUE TO HOLD A LEADERSHIP POSITION IN HEALTH PERCEPTIONS, RANKING AS THE HEALTHIEST NUT IN THE U.S., MEXICO, ITALY, FRANCE, JAPAN AND INDIA.

Global perceptions research also shows that when consumers recall positive stories about nuts, they are most likely to associate those stories with almonds, demonstrating the long-term value of ABC's investment in nutrition science and health communications.

In the U.S., the proportion of consumers who associate positive nut-related news and information with almonds increased from 46% to 52% year over year, while almonds remained the nut most strongly associated with positive stories.

ALMOND BOARD-FUNDED RESEARCH

ADDRESSING ON-FARM CHALLENGES

AS THE INDUSTRY HAS EVOLVED, ALMOND BOARD RESEARCH HAS EVOLVED, TOO. AGRONOMIC AND ENVIRONMENTAL RESEARCH IS CONSISTENTLY EVALUATED THROUGH THE STRATEGIC AG INNOVATION COMMITTEE, Production Stewardship workgroup and Environmental Stewardship workgroup to ensure this research meets the needs of the industry today, with the Global Communications Committee playing a key role in translating research findings into practical grower tools.

FOCUS AREAS

- Field evaluation of rootstocks and new varieties to help growers make informed choices
- Control of emerging pests and diseases, along with more effective and economical tools for persistent pests
- Improving nutrient-use efficiency (nitrogen and potassium), reducing input costs and meeting evolving regulatory demands
- Management of soil quality from compaction to nutrient cycling
- Harvest efficiency
- Honey bee health, pollinators and biodiversity

RESEARCH HIGHLIGHTS

- Developed pheromones for leaffooted plant bugs, technology now commercially available in traps from several companies, to enable monitoring for this growing pest problem
- Enhanced soil quality, pollinator health and biodiversity via the use of cover crops
- Significantly increased nitrogen-use efficiency by moving from episodic to continuum fertigation
- Transitioned to superior rootstocks to boost yields over the lifespan of the orchard, and reduced input costs
- Invested in decades of honey bee health research supporting hive health and effective crop pollination; currently focused on early season treatment to suppress *Varroa* mites

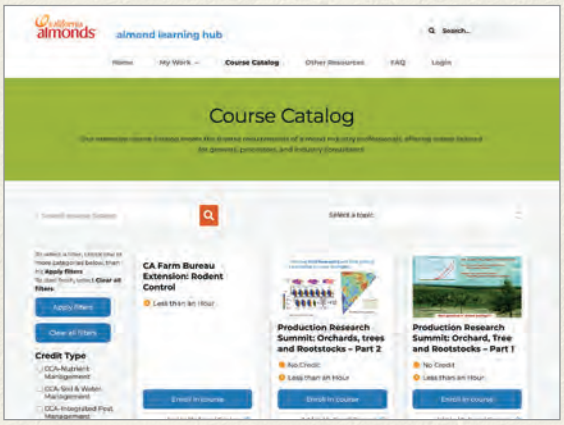
INDUSTRY RESOURCES

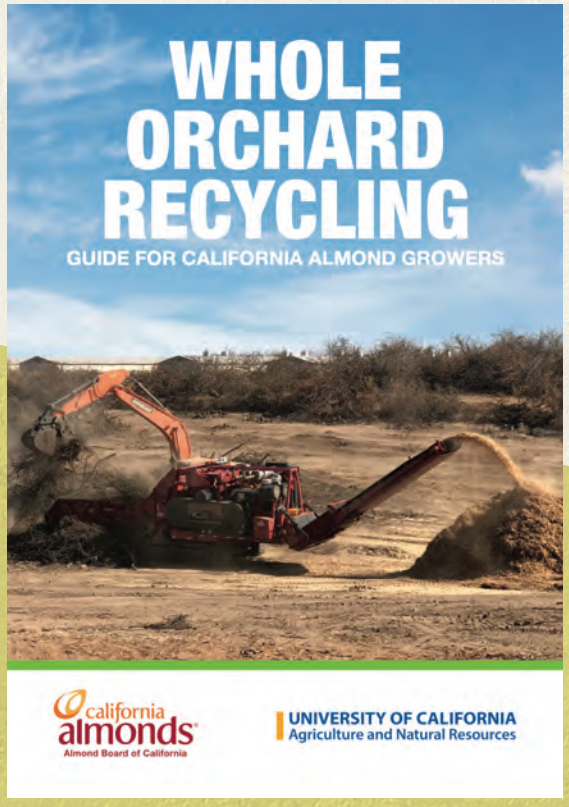
THE ALMOND BOARD OF CALIFORNIA'S ANNUAL PUBLICATIONS, ONLINE RESOURCES, SPECIAL WEBINARS AND THE ALMOND CONFERENCE ARE ALL FOCUSED ON ENSURING GROWERS AND HANDLERS HAVE THE INFORMATION THEY NEED TO MAKE KEY DECISIONS TO IMPROVE PROFITABILITY AND MAKE CONTINUOUS IMPROVEMENTS TO THEIR OPERATIONS.

ALMOND LEARNING HUB

The Almond Learning Hub is a free online resource, now offering more than 125 continuing education units for almond growers, pesticide applicators, handlers or any other U.S.-based almond industry professional.

ALMONDLEARNINGHUB.COM



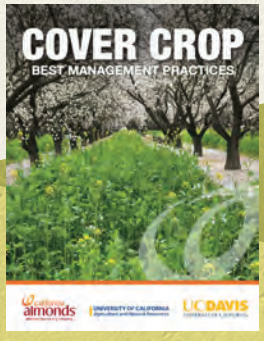


COMPLIMENTARY RESOURCES

Find helpful links, useful guides and videos for growers and handlers in one place—from incentive programs to tools for irrigation, crop protection, pollination, food safety and more!

ALMONDS.ORG/GROWERTOOLS





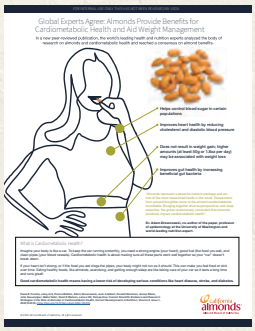
REQUEST YOUR COMPLIMENTARY MATERIALS TODAY!

LEARNING ABOUT ALMONDS

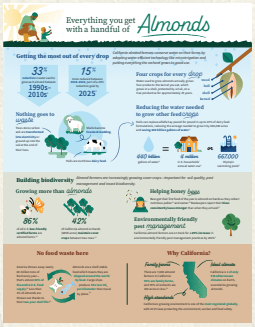
THE ALMOND BOARD OF CALIFORNIA OFFERS A VARIETY OF INFOGRAPHICS PACKED WITH KEY INSIGHTS AND DESIGNED TO HELP SERVE AS GO-TO GUIDES FOR EDUCATING PEOPLE ON THE VARIOUS BENEFITS OF BUYING AND CONSUMING ALMONDS.



HEALTH



CARDIOMETABOLIC

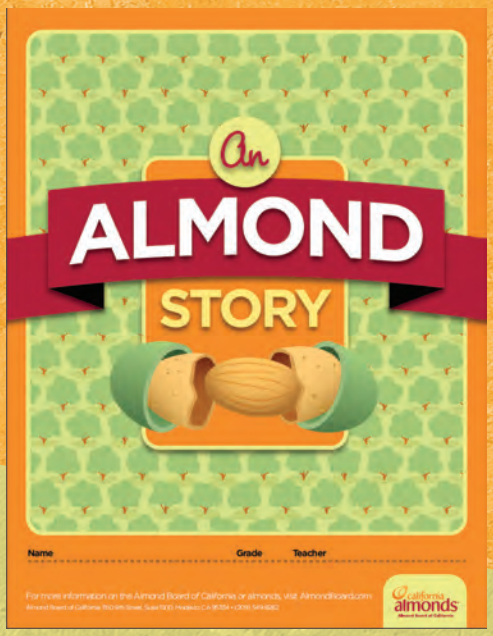


ENVIRONMENTAL STEWARDSHIP



CALIFORNIA ADVANTAGE

AG IN THE CLASSROOM



The Almond Board is committed to providing accurate information to kids across the state about what it takes to grow and process almonds. Through Ag in the Classroom, a nonprofit dedicated to increasing awareness and understanding of California agriculture, the Almond Board developed educational resources explaining how almonds grow, the history of California almonds and the many ways to enjoy them. Complimentary resources are available.

AG IN THE CLASSROOM PROGRAMS + EVENTS

WORLD DESTINATIONS

crop year 2025/26 | million pounds

	DESTINATION	2021/22	2022/23	2023/24	2024/25	2025/26
AMERICAS						
NORTH AMERICA	Canada	62.89	58.13	59.90	60.31	60.82
	Mexico	29.19	30.07	31.14	33.50	36.66
	TOTAL NORTH AMERICA	**92.15**	**88.26**	**91.14**	**93.89**	**97.53**
LATIN AMERICA/ CARIBBEAN	Argentina	2.33	1.82	1.35	3.62	2.72
	Brazil	4.71	6.61	6.02	6.18	5.82
	Chile	10.67	7.02	7.21	10.96	10.44
	Colombia	7.38	5.82	7.38	8.22	8.26
	Costa Rica	1.44	1.03	0.95	1.66	1.36
	Dominican Republic	0.54	0.76	0.60	0.52	0.53
	Ecuador	0.21	0.73	0.59	0.15	0.89
	Trinidad	0.93	0.72	0.63	0.86	1.18
	TOTAL LAT AMER/CARIBBEAN	**31.50**	**30.93**	**30.99**	**40.67**	**39.01**
	TOTAL AMERICAS	**123.65**	**119.20**	**122.13**	**134.55**	**136.54**
ASIA-PACIFIC						
NORTHEAST ASIA	China/Hong Kong	127.30	143.38	106.00	50.81	33.30
	Japan	95.06	87.28	86.46	91.13	84.96
	South Korea	65.41	57.13	59.51	61.45	56.27
	Taiwan	10.79	12.79	10.27	12.97	10.51
	TOTAL NORTHEAST ASIA	**298.57**	**300.59**	**262.30**	**216.37**	**185.04**
SOUTHEAST ASIA	Indonesia	6.72	5.90	8.36	7.28	9.58
	Malaysia	8.30	7.14	6.96	10.12	13.21
	Philippines	1.34	1.42	2.00	1.79	0.90
	Singapore	4.76	5.28	4.62	7.68	11.69
	Thailand	10.98	12.31	15.88	15.92	16.34
	Vietnam	27.39	27.11	42.38	57.53	74.64
	TOTAL SOUTHEAST ASIA	**59.55**	**59.19**	**80.23**	**100.34**	**126.40**
SOUTH/CENTRAL ASIA	Bangladesh	1.47	1.23	0.88	2.24	5.10
	India	352.67	331.08	400.19	423.06	378.50
	Kazakhstan	5.40	8.20	2.62	3.48	6.07
	Nepal	1.09	1.16	0.60	0.78	1.20
	Pakistan	9.54	6.08	4.51	7.49	37.70
	TOTAL SOUTH/CENTRAL ASIA	**375.00**	**354.43**	**409.57**	**437.06**	**428.91**
AUSTRALASIA/OCEANIA	Australia	2.56	1.16	0.61	0.68	0.76
	New Zealand	2.83	2.87	2.91	2.99	2.91
	TOTAL AUSTRALASIA/OCEANIA	**5.39**	**4.03**	**3.53**	**3.70**	**3.67**
	TOTAL ASIA-PACIFIC	**738.50**	**718.24**	**755.62**	**757.47**	**744.02**
EUROPE						
WESTERN EUROPE	Belgium	23.27	16.21	16.94	18.80	31.78
	Denmark	10.55	8.66	10.69	11.03	8.28
	France	21.90	26.42	25.45	25.03	25.15
	Germany	119.13	114.95	107.22	101.74	96.49
	Greece	12.94	12.16	11.29	9.21	10.97
	Ireland	0.78	0.47	0.48	0.70	0.64
	Italy	83.60	83.68	86.89	98.07	107.25
	Netherlands	103.55	87.59	107.63	128.70	98.96
	Norway	5.00	4.25	5.14	5.71	5.41
	Portugal	1.31	0.88	0.62	0.62	0.75
	Spain	226.99	193.79	188.49	166.79	199.29
	Sweden	6.32	5.41	4.55	7.03	4.23
	Switzerland	2.69	2.78	2.45	2.78	3.29
	United Kingdom	27.63	26.43	32.77	33.84	35.89
	TOTAL WESTERN EUROPE	**646.16**	**583.82**	**601.58**	**610.38**	**628.42**
CENTRAL/EASTERN EUROPE	Albania	0.23	0.26	0.12	0.47	1.18
	Armenia	0.18	1.08	0.12	0.21	0.88
	Belarus	0.31	0.53	1.28	1.23	2.86
	Bulgaria	2.10	2.74	3.09	2.47	3.30
	Croatia	3.24	3.11	4.70	2.99	3.29
	Czech Republic	1.06	1.49	1.27	1.06	1.45
	Georgia	1.93	5.42	2.31	1.75	1.44
	Hungary	0.13	0.57	0.35	0.31	0.84
	Latvia	2.74	1.98	3.15	5.06	5.81
	Lithuania	6.36	7.03	8.31	11.47	15.04
	Poland	5.52	6.19	7.27	5.96	10.03
	Romania	0.67	1.51	1.47	1.04	1.93
	Serbia	0.31	0.48	0.88	0.61	0.70
	Ukraine	2.98	0.35	0.53	1.28	2.16
	TOTAL CENTRAL/EASTERN EUROPE	**40.61**	**49.69**	**40.47**	**40.27**	**52.78**
	TOTAL EUROPE	**686.77**	**633.51**	**642.05**	**650.65**	**681.20**
MIDDLE EAST/AFRICA						
MIDDLE EAST	Bahrain	1.33	1.30	1.48	1.32	0.93
	Cyprus	0.97	1.19	1.06	1.12	1.31
	Iraq	1.22	0.67	3.43	5.79	5.79
	Israel	13.02	12.31	7.68	8.56	17.25
	Jordan	14.80	21.57	11.23	17.17	12.49
	Kuwait	3.76	4.21	4.40	4.73	3.47
	Lebanon	3.14	4.82	8.97	8.01	7.96
	Oman	0.49	0.60	1.52	1.26	0.84
	Qatar	1.50	1.62	1.66	2.11	1.58
	Saudi Arabia	19.14	24.82	24.07	29.90	26.26
	Turkey	67.31	77.89	100.43	107.71	156.56
	United Arab Emirates	122.58	121.17	158.48	153.04	116.89
	TOTAL MIDDLE EAST	**249.25**	**272.16**	**324.43**	**340.71**	**351.31**
NORTH AFRICA	Algeria	10.10	15.87	16.98	14.50	17.28
	Egypt	4.16	3.39	1.14	3.30	2.70
	Libya	5.90	12.36	14.24	9.14	7.36
	Morocco	40.21	63.04	77.68	58.64	87.22
	Tunisia	0.25	0.18	0.26	0.44	0.57
	TOTAL NORTH AFRICA	**60.62**	**94.84**	**110.31**	**86.02**	**115.13**
SUB-SAHARAN AFRICA	South Africa	9.77	10.07	9.05	5.38	5.76
	TOTAL SUB-SAHARAN AFRICA	**10.22**	**10.31**	**9.38**	**5.69**	**6.09**
	TOTAL MIDDLE EAST/AFRICA	**320.10**	**377.31**	**444.12**	**432.42**	**472.53**

Total Shipments	**TOTAL EXPORT SHIPMENTS:**	**1,869.02**	**1,848.26**	**1,963.92**	**1,975.09**	**2,034.29**
	TOTAL USA SHIPMENTS:	**764.64**	**716.36**	**728.06**	**671.36**	**595.28**
	TOTAL GLOBAL SHIPMENTS:	**2,633.66**	**2,564.61**	**2,691.98**	**2,646.45**	**2,629.57**

Source: Almond Board of California.
Note: Totals may not add precisely due to rounding. Destinations that shipped more than 500,000 pounds in crop year 2025/26 are listed.

BOLD INITIATIVE · U.S. · GERMANY · ITALY

A BOLD NEW CAMPAIGN FOR THE U.S.

THE MULTIDIMENSIONAL ALMOND COOKING SHOW WILL TRANSFORM PERCEPTIONS OF ALMONDS FROM A ONE-DIMENSIONAL SNACK TO A VERSATILE INGREDIENT WITH ENDLESS POSSIBILITIES.



The "Multidimensional Almond Cooking Show" represents a bold new chapter in almond promotion and one of the Almond Board of California's five Bold Initiatives designed to strengthen long-term demand. Launching across the United States, Germany and Italy, the campaign uses entertaining, social-first storytelling to help consumers see almonds in new ways and create more reasons to purchase and use them.

WHY A NEW APPROACH?

The campaign was developed in response to a key challenge facing the industry: While consumers recognize almonds for their nutrition, many still view them primarily as a snack. At the same time, younger consumers increasingly discover recipes, meal ideas and food trends through social and digital channels. To remain relevant with future consumers, almonds must be showcased in ways that reflect how people engage with food today.

A DIFFERENT KIND OF ALMOND CAMPAIGN

The Multidimensional Almond Cooking Show was created around a simple idea:

> **"When consumers discover new ways to use almonds, they discover new reasons to buy them."**

Through imaginative recipes, creator partnerships and engaging digital content, the show highlights the versatility of whole almonds, almond flour, almond butter and other almond forms. The campaign is designed to support several of the Almond Board's strategic priorities by expanding almond usage beyond snacking, reaching younger audiences, creating new consumption occasions and strengthening demand across key markets.

By connecting almonds to contemporary food culture and everyday cooking occasions, the campaign aims to increase household demand, inspire greater use of almond ingredients and position California almonds for future growth. The Multidimensional Almond Cooking Show demonstrates how the Almond Board is combining consumer insights, creativity and integrated marketing to build relevance and demand for the next generation of almond consumers.

X DIMENSIONS
OF ABC'S STRATEGY

01 Expands almond demand among younger consumers

02 Showcases the versatility of almond ingredients

03 Creates new consumption occasions

04 Strengthens demand in key global markets

05 Builds long-term relevance for California almonds

TOP 10 GLOBAL DESTINATIONS FOR CALIFORNIA ALMONDS

crop year 2025/26 | million pounds

The U.S. is an incredibly important market representing 23% share of shipments. India remains the #1 export destination, with shipments of 379 million pounds, a decrease of 11% from 2024/25.



Source: Almond Board of California July 2026 Position Report.

POSITION REPORT OF CALIFORNIA ALMONDS

crop years 2016/17–2026/27 | million pounds

CROP YEAR	REDETERMINED MARKETABLE WEIGHT	CARRY-IN	RESERVE	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS	TOTAL SHIPMENTS	SALABLE CARRY-OVER
2016/17	2,087.4	412.0	N/A	2,499.4	676.0	1,425.0	2,101.0	398.7
2017/18	2,211.9	398.7	N/A	2,610.6	734.7	1,516.8	2,251.5	359.0
2018/19	2,223.3	359.0	N/A	2,582.3	741.2	1,522.9	2,264.0	318.3
2019/20	2,504.2	318.3	N/A	2,822.5	774.3	1,598.2	2,372.4	450.1
2020/21	3,056.1	450.1	N/A	3,506.2	808.1	2,090.0	2,898.1	608.1
2021/22	2,862.6	608.1	N/A	3,470.8	764.6	1,869.3	2,633.9	836.8
2022/23	2,528.1	836.8	N/A	3,364.9	716.4	1,848.3	2,564.6	800.3
2023/24	2,394.3	800.3	N/A	3,194.6	728.1	1,963.9	2,692.0	502.7
2024/25	2,658.7	502.7	N/A	3,161.3	671.4	1,975.1	2,646.5	483.8
2025/26	2,616.4	483.8	N/A	3,100.2	595.3	2,034.3	2,629.6	470.7
2026/27*	2,646.0	470.7	N/A	3,116.7	601.8	2,014.9	2,616.7	500.0

Source: Almond Board of California. *Estimated.



30 million tons of carbon is captured and stored in California almond orchards, equal to the annual emissions of 24 million cars—more cars than California, Oregon, Washington and Texas combined.

Sources: California Air Resources Board. An Inventory of Ecosystem Carbon in California's Natural & Working Lands. 2020. U.S. Environmental Protection Agency. Greenhouse Gas Equivalencies Calculator. July 2023.

INGREDIENT INNOVATION

INGREDIENT INNOVATION IS EMERGING AS ONE OF THE ALMOND INDUSTRY'S MOST SIGNIFICANT OPPORTUNITIES FOR FUTURE DEMAND GROWTH.

Rather than focusing solely on traditional snack consumption, the industry is investing in a demand-led strategy that identifies where almonds can meet evolving consumer needs by developing ingredient solutions to support those applications. Efforts underway include research on almond flour, flour blends, protein ingredients, almond oil functionality and new coproduct opportunities, all aimed at helping food manufacturers, foodservice operators and product developers incorporate almonds into a broader range of products.





The Almond Board of California is also investing in education and partnership programs that help bring these opportunities to market. Through a partnership with the Culinary Institute of America, the Almond Board launched a European-Style Bakery Masterclass designed to help bakers, chefs and food developers better understand the functionality, versatility and nutritional benefits of almonds.



ALMOND HULL POWDER

One of the most exciting areas of innovation for the almond industry is the advancement of almond hull powder (AHP) for human food applications. Following an independent expert review, almond hull powder achieved Generally Recognized As Safe (GRAS) status, opening the door for a coproduct traditionally used in animal feed to be incorporated into foods such as cereals, baked goods, nutrition bars and beverages. Because almond hulls make up about 50% of the almond fruit, this milestone creates new opportunities to capture value from more of the crop while supporting circular agriculture and reducing waste.



CHICAGO IMMERSION EVENT: INSPIRING ALMOND INNOVATION

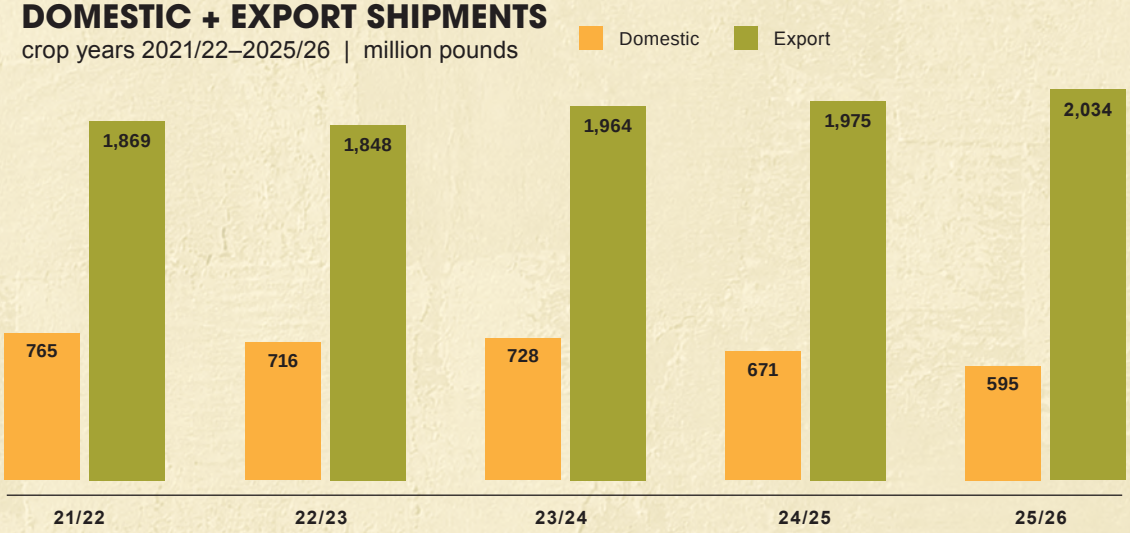
In April 2026, the Almond Board hosted an exclusive two-day immersion experience in Chicago designed to inspire new thinking around almond innovation. The program brought together food industry professionals—from large consumer goods companies to entrepreneurs—to explore emerging consumer trends, cultural influences and future product opportunities through trend presentations, innovation safaris, collaborative discussions and hands-on workshops.

KEY OUTCOME:
The immersion event positioned almonds as a versatile innovation platform while generating new inspiration, strengthening industry relationships and creating opportunities for future collaboration with influential food professionals.

SHIPMENTS

DOMESTIC + EXPORT SHIPMENTS

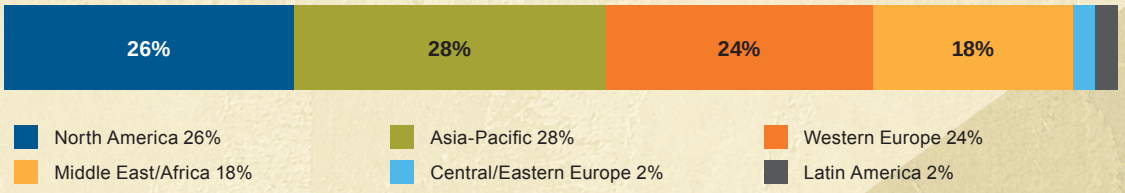
crop years 2021/22–2025/26 | million pounds



Source: Almond Board of California.

SHIPMENTS BY REGION

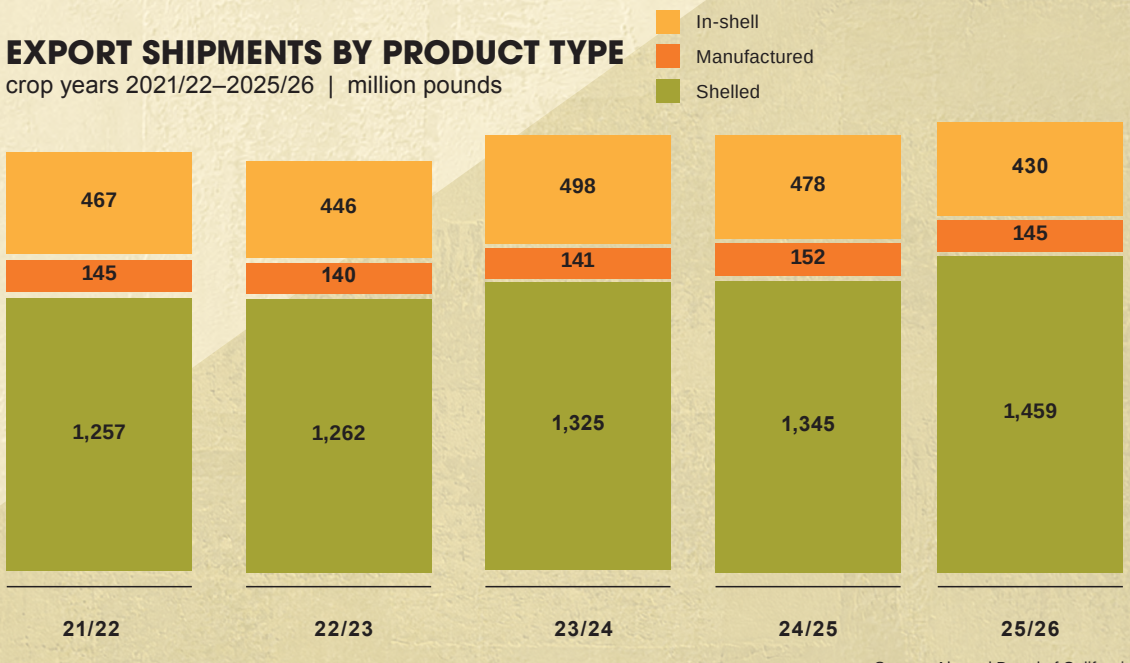
crop year 2025/26 | percent of total shipments



Source: Almond Board of California. Note: Totals may not add precisely due to rounding.

EXPORT SHIPMENTS BY PRODUCT TYPE

crop years 2021/22–2025/26 | million pounds



Source: Almond Board of California.

REIMAGINING CALIFORNIA ALMONDS IN INDIA

CALIFORNIA ALMONDS STRENGTHENED ITS CONSUMER MARKETING PRESENCE IN INDIA BY GIVING ALMONDS A MORE CONTEMPORARY AND EMOTIONALLY RELEVANT ROLE IN CONSUMERS' LIVES.

The work is intended to change perceptions of almonds as a familiar traditional food, and position them as a modern superfood that remains culturally rooted while feeling relevant to today's young consumer.

To introduce the new brand positioning in market, the Almond Board of California launched the *Superfood for a Super You* platform to engage Indian consumers through culturally relevant storytelling, benefit-led messaging and digital-first experiences.

SUPERFOOD LAUNCH

ABC debuted *Superfood for a Super You* during the 2026 IPL cricket season, one of India's most celebrated cultural and sporting moments. A 360° campaign connected the energy of cricket with clear almond benefit messaging through digital media, social content, influencer engagement, cricketer collaborations and regional language touchpoints.



FESTIVE SEASON



Diwali and the broader festive season offered a meaningful opportunity to drive almond purchase and consumption. Building on almonds' cultural credibility as a festive gift, ABC's *Badam for Every Buddy* campaign made almonds more intentional, modern and personal. The campaign encouraged consumers to think beyond family and close friends, positioning almonds as a thoughtful gift for colleagues, mentors, workout partners, travel companions and chosen-family relationships.

BAND BAAJAA BRIDE

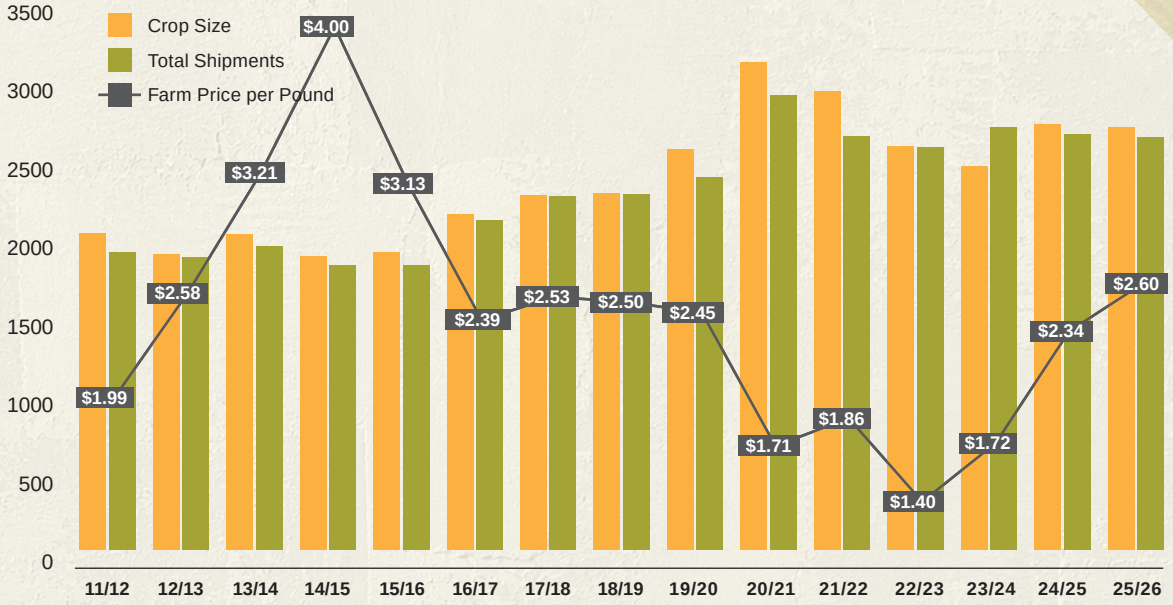
Weddings represent one of India's most culturally significant and high-value gifting occasions. To strengthen California almonds' presence in this space, ABC sponsored the returning season of the popular bridal series *Band Baajaa Bride*, which aired on NDTV Good Times and YouTube. Throughout the season, California almonds were integrated into the program and positioned as a thoughtful, distinctive gift that can reflect a couple's heritage and personal style—from invitation boxes and shagun platters to festive hampers and wedding favors.



CROP + SHIPMENTS

HISTORICAL CROP SIZE + SHIPMENTS VS. FARM PRICE

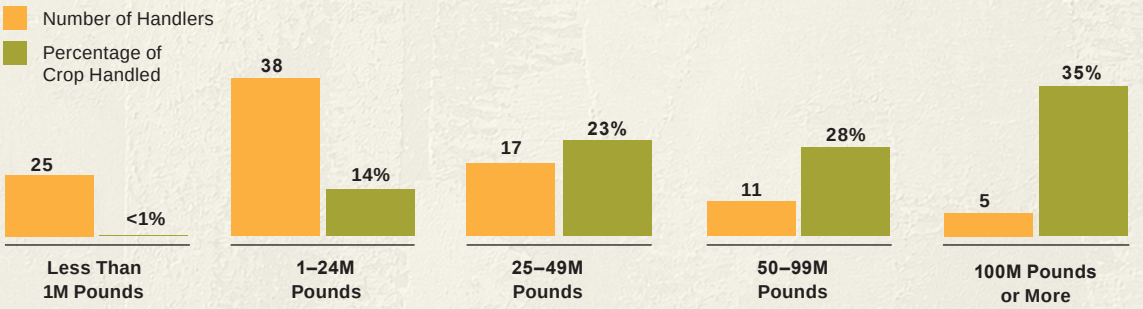
crop years 2011/12–2025/26 | million pounds



Sources: Almond Board of California.
U.S. Department of Agriculture, National Agricultural Statistics Service, Pacific Regional Office (USDA, NASS/PRO).

DISTRIBUTION OF CROP BY HANDLER SIZE

crop year 2025/26



Source: Almond Board of California.

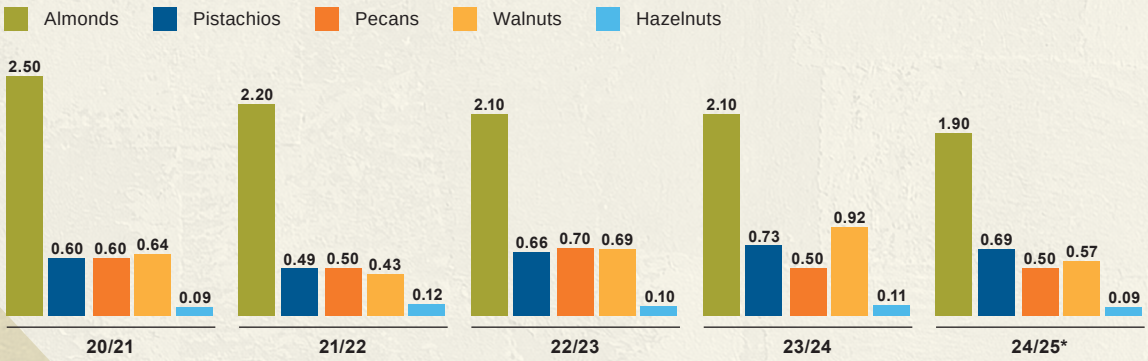
PROCESSING ALMONDS

96 ALMOND HANDLERS

PROCESS CALIFORNIA ALMONDS. MANY OF THESE OPERATIONS ARE FAMILY OWNED.

DOMESTIC PER CAPITA AVAILABILITY OF COMPETING NUTS

crop years 2020/21–2024/25 | pounds per person



Source: USDA, Economic Research Service, Fruit & Tree Nut Situation and Outlook. *Preliminary.

U.S. PRODUCTION + IMPORTS OF COMPETING NUTS

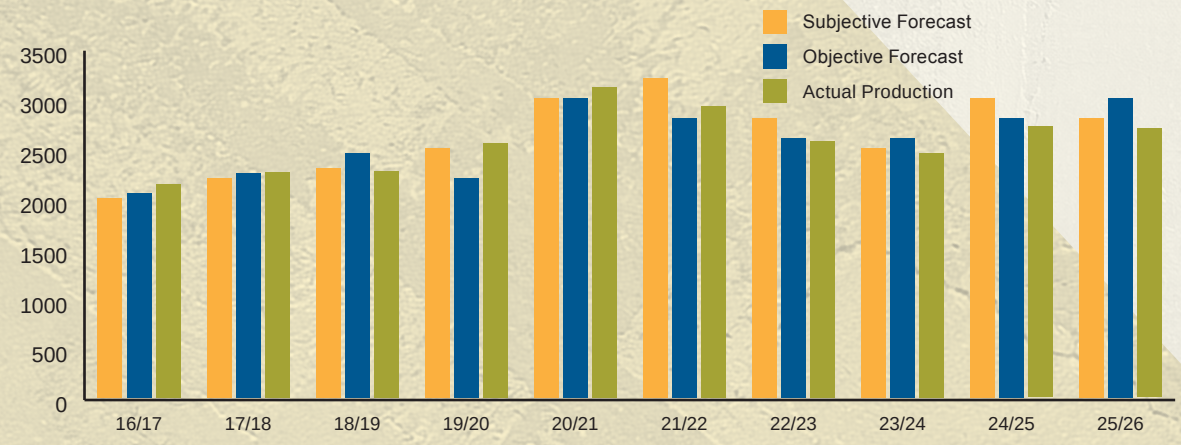
crop years 2015/16–2024/25 | million pounds (shelled basis)

CROP YEAR	ALMONDS		WALNUTS		HAZELNUTS		PECANS		PISTACHIOS		MACADAMIAS		ALL TREE NUTS	
	CROP	IMPORTS	CROP	IMPORTS	CROP	IMPORTS	CROP	IMPORTS	CROP	IMPORTS	CROP	IMPORTS	CROP	IMPORTS
2015/16	1,894.4	31.8	527.0	10.8	23.3	9.2	104.5	113.7	134.6	1.2	21.4	27.0	2,705.1	668.1
2016/17	2,135.7	26.6	608.4	15.7	35.1	11.5	127.9	132.6	446.3	1.4	19.1	18.7	3,372.6	697.2
2017/18	2,260.5	32.5	557.1	12.7	25.6	13.8	141.1	137.1	226.9	1.6	22.3	23.5	3,233.5	738.8
2018/19	2,269.6	32.3	601.5	2.6	40.9	16.8	101.9	166.0	487.5	1.3	16.0	30.1	3,517.3	720.2
2019/20	2,551.2	26.3	559.9	2.7	36.3	13.5	139.0	153.8	370.7	1.6	18.5	26.5	3,675.6	755.9
2020/21	3,107.0	21.6	704.3	2.0	50.6	10.6	156.7	137.7	526.6	3.1	17.8	20.1	4,562.9	705.7
2021/22	2,922.0	22.2	643.0	3.1	62.2	10.3	121.9	117.0	582.1	2.4	23.0	32.2	4,354.1	785.5
2022/23	2,571.1	20.3	606.2	1.2	62.1	6.6	146.5	128.2	442.9	1.0	17.1	59.0	3,845.9	659.1
2023/24	2,446.0	18.0	746.6	3.1	75.4	7.4	147.5	123.7	750.6	1.9	16.7	10.9	4,182.9	708.0
2024/25*	2,712.9	14.5	544.1	1.8	77.5	8.4	130.9	96.0	555.6	4.0	16.3	22.8	4,035.8	732.9

Source: USDA, Economic Research Service, Fruit & Tree Nut Yearbook Tables.
Almond crop receipts are from Almond Board of California's year-end Position Report. *Preliminary.

CALIFORNIA ALMOND FORECASTS VS. ACTUAL PRODUCTION

crop years 2016/17–2025/26 | million pounds



Sources: Almond Board of California. USDA, NASS/PRO.

GLOBAL MARKET DEVELOPMENT

IN ADDITION TO THE U.S. AND INDIA MARKETS (SEE PGS. 11 AND 15), THE ALMOND BOARD OF CALIFORNIA'S INTERNATIONAL PROGRAMS ADVANCE THE INDUSTRY'S FIVE BOLD INITIATIVES BY BUILDING CONSUMER DEMAND, strengthening health and nutrition leadership, accelerating innovation, expanding strategic partnerships and reinforcing the value of California almonds. Across established and emerging markets, these efforts help grow consumption, protect market share and build long-term demand.

EUROPE

GERMANY



Germany remains a strategic innovation hub for California almonds, supported by a growing plant-based movement, strong health and wellness trends and a highly engaged consumer base. In 2027, the Almond Board will launch *The Almond Feed* marketing campaign, using advertising, influencer collaborations and surround-sound media to inspire younger consumers to see almonds in fresh, versatile ways.

The Almond Board will also continue to engage food manufacturers and product developers, including at Food Ingredients Europe.

ASIA-PACIFIC

CHINA



China continues to be a crucial market, with approximately 33 million pounds of California almond shipments in crop year 2025/26.

The Almond Board collaborates with government agencies and industry stakeholders to protect market access and build trade confidence. To foster innovation and expand almond usage in food products, the Almond Board conducts workshops with nut brands and manufacturers, as well as partners with baking schools and competitions that train food professionals.

AMERICAS

MEXICO



Mexico presents a compelling growth opportunity driven by a growing middle class, strong trade relationships and a deep affinity for California agriculture. The Almond Board's 2026 efforts focused on expanding almond usage within the baking sector through partnerships with influential bakers, R&D chefs, procurement leaders and bakery professionals.

Key initiatives included participation in Mexipan and Expo Pan, a California harvest tour designed to connect bakery influencers directly with almond production and a trade communications campaign.

EUROPE

ITALY



Italy is a leading market for California almonds, with strong demand across bakery, confectionery, snacking and emerging plant-based products. The Almond Board is building on this strength through a partnership with the University of Gastronomic Sciences of Pollenzo (UNISG), engaging with Italy's food innovation community to showcase the versatility of almonds and expand opportunities for value-added ingredients, including almond flour and paste. In 2027, the focus on versatility will extend to consumers through *The Almond Feed* campaign, bringing fresh, culturally relevant inspiration to how Italians use and enjoy almonds.



ASIA-PACIFIC

SOUTH KOREA



South Korea remains one of the strongest almond markets in Asia, with the highest per capita almond consumption in the region and a consumer base that increasingly views almonds as a functional health food. In 2026, the Almond Board continued strengthening demand through nutrition-focused communications and retail partnerships, including the *Emart Retail Almond Campaign*, as well as engaging with industry stakeholders through initiatives such as the Seoul International Cafe Show and Freedom 250 collaborative bakery promotions with the Agricultural Trade Office.

ASIA-PACIFIC

JAPAN



As one of the most established markets for California almonds, Japan continues to benefit from exceptionally high consumer trust and strong recognition of almonds as a healthy everyday food. The Almond Board's 2026 activities focused on reinforcing almonds' health credentials through public relations and digital communications while maintaining strong industry relationships through the Japan Nut Association annual meetings and other trade engagements that support long-term market presence and industry collaboration.

MIDDLE EAST/AFRICA

MOROCCO



Morocco remains California almonds' leading market in Africa and one of the industry's most culturally significant markets. Almonds are deeply embedded in traditional Moroccan cuisine, from bakery applications to everyday snacking, creating a strong foundation for continued demand. In 2026, the Almond Board built on this legacy through its partnership with the Institut de Formation aux Métiers de la Boulangerie et de la Pâtisserie (IFMBP), integrating almonds into bakery education and professional training programs.

MIDDLE EAST/AFRICA

TURKEY



Turkey has become one of California almonds' largest export destinations and represents a significant opportunity to expand consumer demand in a market where almonds are viewed as a premium product. In 2026, the Almond Board focused on strengthening almonds' health positioning through nutrition education programs, health professional engagement, recipe development and the Nut Nutrition Series. Industry outreach included participation in trade visits, conferences and exploration of retail partnerships such as Migros.

THE ECONOMIC IMPACT OF CALIFORNIA ALMONDS

TOTAL IMPACT IN CALIFORNIA (2026)

TOTAL JOBS

99,826

Total jobs supported by California's almond industry

TOTAL OUTPUT

$21.35 BILLION

Total economic output generated across California

TOTAL WAGES

$8.06 BILLION

Total wages and benefits supported

TOTAL STATE TAXES

$1.1 BILLION

Total state tax revenues generated

FARMGATE VALUE

$6.87 BILLION (2025 REPORT)

Total farmgate value of crop produced

ECONOMIC IMPACT ACROSS THE U.S.

TOTAL JOBS
121,802

TOTAL OUTPUT
$30.27 BILLION

TOTAL FEDERAL TAXES
$2.27 BILLION

TOTAL EXPORT VALUE
$6.62 BILLION

ROOTED IN CALIFORNIA
Supports more than 7,600 growers across the Central Valley.

SUPPORTS COMMUNITIES
Strengthening communities through jobs, wages, allied services and tax revenues.

ANCHORED BY FAMILY FARMS
Over 90% of almond farms are family farms, owned and operated by multi-generational growers.

FUELS GLOBAL DEMAND
Driving consumer demand worldwide and strengthening U.S. exports.





Sources: John Dunham & Associates, Economic Impact of the California Almond Industry (2026; reflects 2025 industry activity, dollar figures in 2026 dollars). USDA, NASS, Noncitrus Fruits and Nuts 2025 Summary (Retrieved May 2026).

DRIVING TRUST, MARKET ACCESS AND GLOBAL DEMAND FOR CALIFORNIA ALMONDS

PROTECTING AND EXPANDING GLOBAL MARKET ACCESS IS ESSENTIAL TO THE LONG-TERM SUCCESS OF CALIFORNIA ALMONDS.

Through strategic partnerships, government engagement and technical support, the Almond Board of California works to reduce trade barriers, address regulatory challenges and mitigate market disruptions. Together, these efforts strengthen the global reputation and competitiveness of California almond growers, handlers and exporters.



ABC delegation meets with U.S. government officials in Washington, DC, to advance market access and trade priorities for California almonds.



ABC and industry officials visit ABC's booth at MEWA India 2026 to discuss trade, regulatory and marketing opportunities for California almonds.



ABC meets with Chinese Embassy officials to discuss mutually beneficial trade between the California almond industry and Chinese tree nut sector.

2026 KEY HIGHLIGHTS

Under the United States–European Union trade agreement, implemented a tariff-rate quota (TRQ) delivering 0% tariff access for California almonds and other U.S. tree nuts beginning July 2026.

Secured the addition of almonds as a nonsensitive produce in the U.S.–China Board of Trade initiative aimed at reducing tariffs on California almonds.

Reduced Japan's almond inspection rate to 4% under the Pre-Test protocol, improving trade efficiency and predictability for exporters.

Helped handlers navigate new import requirements in Pakistan and Turkey in response to trade disruptions associated with the Strait of Hormuz.

Hosted European Union customs and port officials in California to strengthen understanding of the almond industry's food safety, quality and export systems.

Resolved two import inspection requirements as a direct result of a California visit by Moroccan customs and food safety officials.

Secured registration renewals for 66 California almond handlers and processors under China's Decree 280 requirement.

Secured USDA Agricultural Trade Promotion Program (ATP) funding to expand global demand-building programs for California almonds.

Provided information and education to the Almond Alliance on regulatory topics affecting the almond industry, including pesticides, Prop 65 and EU packaging regulations.

CALIFORNIA PRIDE

ABC'S CALIFORNIA RELATIONS PROGRAM SUPPORTED THE BOLD INITIATIVES BY INCREASING VISIBILITY, RELEVANCE AND APPRECIATION FOR CALIFORNIA ALMONDS AMONG KEY AUDIENCES.

Through strategic storytelling, media partnerships, experiential activations, culinary collaborations and consumer outreach, the Almond Board connected Californians to the people, innovation and stewardship behind almond farming. From highlighting California's unique ability to grow almonds to showcasing sustainability, circularity and community impact, these efforts helped build understanding and pride for one of the state's flagship crops.

ONLY CALIFORNIA WILL DO

In 2025, the Almond Board introduced the *Only California Will Do* advertising campaign, aimed at engaging urban Californians. The consumer advertising campaign celebrated California as the only place in the U.S. capable of growing almonds, strengthening connections between Californians and the growers who produce one of the state's signature crops. Building upon the campaign, the following initiatives were launched in 2026.



ALMOND SURFBOARDS

ABC partnered with Almond Surfboards to celebrate the shared values of stewardship, craftsmanship, innovation and community that connect two California-born brands. Through community events and consumer engagement, the collaboration connected audiences to California's agricultural landscape through the state's iconic surf culture. Together, the partnership showcased a uniquely California way of life rooted in healthy living, respect for the land and pride in local communities.



STARCHEFS

ABC partnered with StarChefs to demonstrate the versatility of California almonds through chef-created menu concepts, increasing awareness among culinary professionals and food influencers.



CLIMATE WEEK ENGAGEMENT

Through activations with PlanetHAUS and Regen House during San Francisco and New York Climate Weeks, ABC engaged consumers, media and sustainability leaders on California almonds' contributions to climate resilience and sustainable food systems.

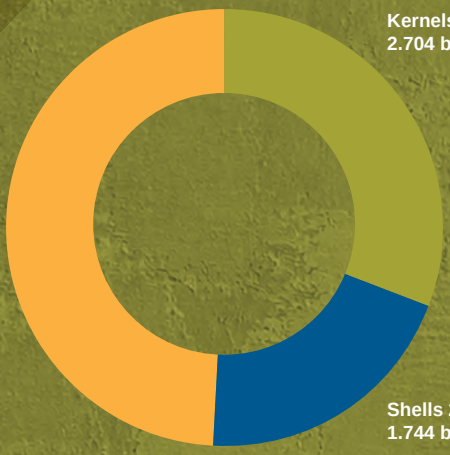


SAN FRANCISCO CHRONICLE

A two-part storytelling partnership with the *San Francisco Chronicle* highlighted California almond growers' innovation, stewardship and zero-waste approach, helping urban audiences better understand modern almond farming. The second story, "Yes, Almonds Use Water. Here's the Rest of the Story," addressed questions about almonds and water use. **Scan the codes to read both stories.**

ALMOND TREE FRUIT WEIGHT

crop year 2025/26



Sources: Kernel Weight—USDA Incomings received by Almond Board of California. Shell & Hull Estimations—Varietal Coproduct Ratios and Production Volumes (Almond Board of California 2020).

DID YOU KNOW?

This year the Almond Board achieved Generally Recognized As Safe (GRAS) status for almond hull powder, adding value for farmers and supporting the circular economy.

CALIFORNIA ALMOND CROP ESTIMATES + ACTUAL RECEIPTS

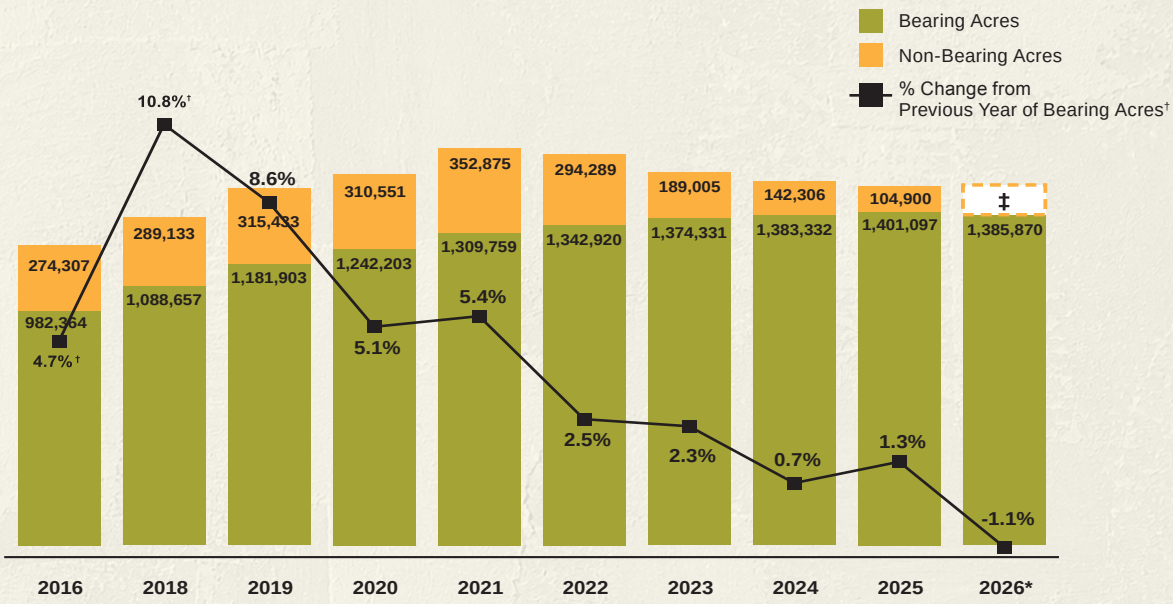
crop years 2017/18–2026/27 | million pounds

CROP YEAR	OBJECTIVE FORECAST	HANDLER RECEIPTS	LOSS AND EXEMPT	REDETERMINED MARKETABLE WEIGHT	LBS. REJECTS IN RECEIPTS
2017/18	2,250.0	2,260.5	48.6	2,211.9	54.8
2018/19	2,450.0	2,269.6	46.2	2,223.3	39.3
2019/20	2,200.0	2,551.2	47.0	2,504.2	42.1
2020/21	3,000.0	3,107.0	50.8	3,056.1	44.0
2021/22	2,800.0	2,922.0	59.4	2,862.6	57.2
2022/23	2,600.0	2,571.1	43.0	2,528.1	54.6
2023/24	2,600.0	2,446.0	51.7	2,394.3	103.4
2024/25	2,800.0	2,712.9	85.3	2,627.6	84.0
2025/26	3,000.0	2,693.8	77.4	2,616.4	71.1
2026/27**	N/A	*	54.0	2,646.0	*

*Not available at time of publication.
**Estimated.
Source: Almond Board of California.
Objective forecast provided by USDA, NASS, California Field Office.

CALIFORNIA ALMOND ACREAGE

crop years 2016–2026



Source: Land IQ, 2026 Standing Acreage Initial Estimate—April 2026. *Estimated.
†Land IQ acreage data unavailable for 2015 and 2017. Percent change of bearing acres in 2016 and 2018 is from two years prior. ‡Not available at time of publication.

CALIFORNIA ALMOND ACREAGE + FARM VALUE

crop years 2017/18–2026/27

	ACRES				YIELD		VALUE		
CROP YEAR	BEARING	NON-BEARING	TOTAL	AVERAGE TREES PER ACRE	BEARING ACRE YIELD (LBS.)	PRODUCTION* (MILLION LBS.)	FARM PRICE	FARM VALUE ($1,000)	VALUE PER BEARING ACRE
2017/18	-	-	-	117.0	2,200	2,260	$2.53	$5,603,950	$5,441
2018/19	1,088,657	289,133	1,377,790	119.0	2,090	2,270	$2.50	$5,602,500	$5,146
2019/20	1,181,903	315,433	1,497,336	122.0	2,170	2,551	$2.45	$6,169,100	$5,220
2020/21	1,242,203	310,551	1,552,754	122.0	2,490	3,107	$1.71	$5,251,410	$4,227
2021/22	1,309,759	352,875	1,662,634	122.0	2,240	2,922	$1.86	$5,351,220	$4,086
2022/23	1,342,920	294,289	1,637,209	122.5	1,910	2,571	$1.40	$3,536,400	$2,633
2023/24	1,374,331	189,005	1,563,336	124.7	1,780	2,446	$1.72	$4,045,440	$2,944
2024/25	1,383,332	142,306	1,525,638	125.4	1,980	2,713	$2.34	$6,175,260	$4,464
2025/26	1,401,097	104,900	1,505,997	125.4	1,940	2,694	$2.60	$6,874,400	$4,906
2026/27†	1,385,870	‡	‡	‡	1,940	‡	‡	‡	‡

Sources: Land IQ. USDA, NASS/PRO. Note: Land IQ data unavailable for 2017/18 crop year. USDA/NASS acreage data used for Value Per Bearing Acre calculation in 2017/18. The Almond Board does not track prices.
*Production numbers provided by Almond Board of California. †Estimated as of September 1, 2026. ‡Not available at time of publication.



CROP VALUE + YIELD PER BEARING ACRE

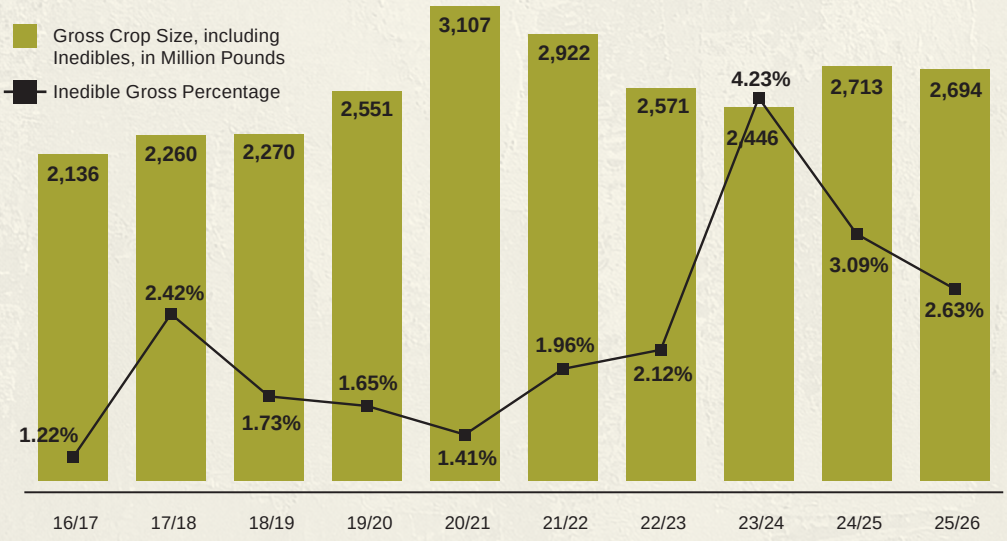
crop years 2016/17–2025/26



Sources: Land IQ. USDA, NASS/PRO. Note: Land IQ acreage data unavailable for 2017/18 crop year. USDA/ NASS acreage data used for Value Per Bearing Acre calculation.

CALIFORNIA ALMOND CROP-SIZE HISTORY + INEDIBLE PERCENTAGE

crop years 2016/17–2025/26



Source: Almond Board of California.

DID YOU KNOW?

80% of California almond farms use 11 or more regenerative practices, such as cover crops, compost and whole orchard recycling.

Source: SureHarvest. Regenerative Agriculture Practice Adoption in California Almonds. May 2026.

CALIFORNIA ALMOND RECEIPTS BY COUNTY + VARIETY

crop year 2025/26 | pounds

Counties	% Crop	Nonpareil	Monterey	Indepen-dence	Butte/ Padre	Carmel	Fritz	All Others	All Varieties
Northern									
Butte	1.6%	20,579,401	3,109,819	2,783,228	3,106,859	2,138,869	245,256	11,180,620	43,144,052
Colusa	5.2%	65,309,776	17,701,573	6,913,804	10,194,688	8,864,296	5,226,968	25,968,001	140,179,106
Glenn	3.3%	49,229,660	8,387,954	4,180,613	6,043,635	4,400,886	332,704	16,830,054	89,405,506
Solano	1.8%	15,421,634	3,430,861	17,753,371	2,338,517	1,410,405	0	8,001,835	48,356,623
Sutter	0.9%	6,729,491	2,636,743	8,373,843	1,564,011	562,263	33,974	3,909,868	23,810,193
Tehama	1.1%	15,792,856	3,001,340	1,464,363	2,208,414	3,127,430	24,235	4,499,054	30,117,692
Yolo	3.0%	32,915,367	11,405,336	12,440,403	2,806,050	2,765,308	677,989	17,142,051	80,152,504
Yuba	0.2%	1,215,593	545,121	3,206,496	8,952	115,292	48,431	1,021,545	6,161,430
Others	0.4%	2,340,882	670,715	4,775,720	193,745	96,616	58,327	2,333,482	10,469,487
Totals	**17.5%**	**209,534,660**	**50,889,462**	**61,891,841**	**28,464,871**	**23,481,365**	**6,647,884**	**90,886,510**	**471,796,593**
Central									
Merced	10.1%	97,708,388	44,903,970	46,061,486	20,949,176	7,188,699	8,203,642	47,542,252	272,557,613
San Joaquin	8.1%	70,213,115	18,683,825	64,000,321	10,267,041	11,104,041	4,339,453	41,165,436	219,773,232
Stanislaus	14.3%	122,574,829	37,862,635	95,578,571	29,292,095	19,404,547	10,141,209	71,851,004	386,704,890
Others	0.3%	2,696,667	1,213,666	1,399,687	121,065	156,468	0	1,203,412	6,790,965
Totals	**32.8%**	**293,192,999**	**102,664,096**	**207,040,065**	**60,629,377**	**37,853,755**	**22,684,304**	**161,762,104**	**885,826,700**
Southern									
Fresno	18.1%	172,691,883	110,831,106	93,386,292	32,515,837	2,313,422	6,249,424	71,493,167	489,481,131
Kern	14.7%	172,795,862	124,052,506	22,515,686	20,885,776	3,971,422	19,924,715	32,637,512	396,783,479
Kings	2.3%	21,021,757	15,065,355	15,090,060	3,441,107	0	497,438	7,293,156	62,408,873
Madera	9.6%	107,365,442	63,490,457	19,308,703	17,673,155	4,064,326	7,751,865	38,785,210	258,439,158
Tulare	5.1%	54,035,640	34,864,330	27,430,347	5,791,778	243,025	2,357,482	12,807,231	137,529,833
Others	<0.1%	139,520	175,107	135,485	0	0	0	795,621	1,245,733
Totals	**49.8%**	**528,050,104**	**348,478,861**	**177,866,573**	**80,307,653**	**10,592,195**	**36,780,924**	**163,811,897**	**1,345,888,207**
Grand Total	**100.0%**	**1,030,777,763**	**502,032,419**	**446,798,479**	**169,401,901**	**71,927,315**	**66,113,112**	**416,460,511**	**2,703,511,500**

Source: USDA Incoming Receipts. Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre. Totals may not add precisely due to rounding.

CALIFORNIA ALMOND PRODUCTION BY COUNTY

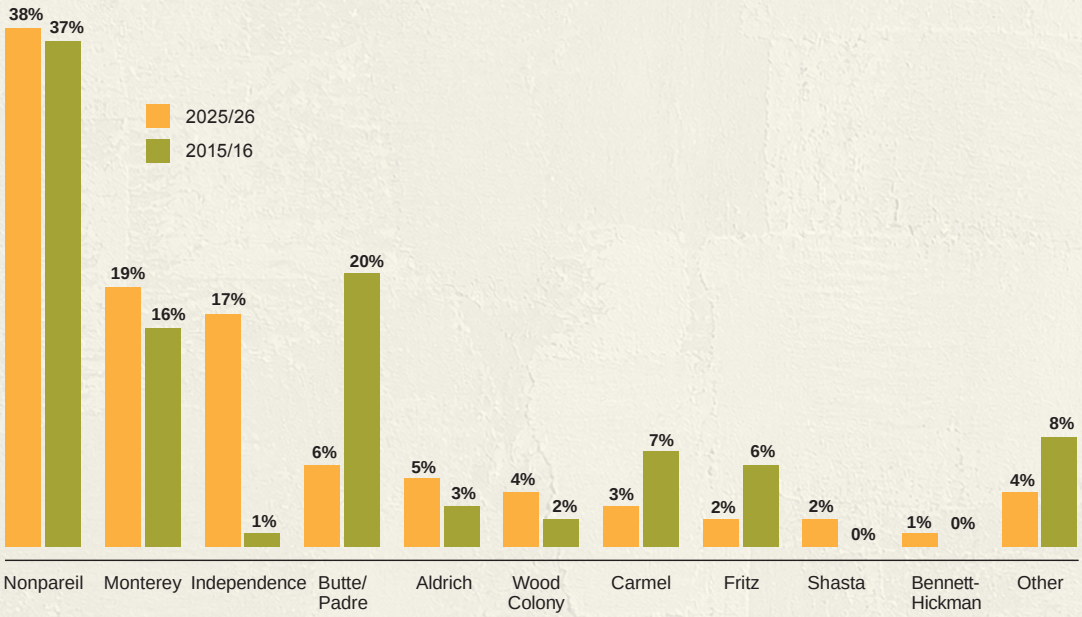
crop years 2016/17–2025/26 | million pounds

	Colusa	Glenn	Yolo	Solano	Butte	Tehama	Sutter	Yuba	Stanislaus	Merced	San Joaquin	Fresno	Kern	Madera	Tulare	Kings	All Others	Total
	Northern								**Central**			**Southern**						
2016/17	104.0	68.9	28.0	6.2	54.3	17.4	8.3		291.0	222.3	104.9	433.2	433.2	242.6	73.9	40.3	2.1	2,130.6
2017/18	112.9	72.6	39.7	8.4	52.1	18.6	8.7		303.2	223.7	108.7	494.4	429.5	264.0	80.9	43.6	2.4	2,263.7
2018/19	96.8	69.4	39.4	11.3	57.1	16.2	9.0		341.9	235.1	135.5	462.4	398.2	261.4	81.1	48.5	4.7	2,268.1
2019/20	113.6	63.5	55.8	14.5	43.2	18.4	10.4	1.3	302.3	223.4	124.4	598.3	491.7	298.9	116.4	68.8	6.8	2,551.5
2020/21	156.2	96.0	79.5	29.7	70.6	29.9	19.3	2.7	437.2	305.9	177.9	655.5	495.7	351.3	120.1	78.9	8.5	3,114.9
2021/22	117.7	77.0	65.2	31.3	51.4	28.1	18.3	2.9	414.5	294.1	181.0	610.3	473.6	333.8	134.0	74.7	10.4	2,918.5
2022/23	65.6	32.8	36.1	16.2	36.9	10.3	7.5	2.1	383.4	287.5	191.2	518.3	457.6	304.1	144.7	67.9	9.1	2,571.3
2023/24	123.3	81.1	62.1	29.3	46.4	26.7	21.2	4.4	330.9	233.9	165.1	458.2	403.1	241.2	137.5	66.2	15.6	2,446.2
2024/25	138.2	88.8	70.9	38.8	48.2	28.5	25.2	6.7	366.4	278.8	195.0	559.5	347.9	308.5	125.0	68.1	19.1	2,713.5
2025/26	140.2	89.4	80.2	48.4	43.1	30.1	23.8	6.2	386.7	272.6	219.8	489.5	396.8	258.4	137.5	62.4	18.5	2,703.5

Source: USDA, Report of Inedible Content of Almond Receipts. Note: Totals may not add precisely due to rounding.

TOP 10 ALMOND-PRODUCING VARIETIES

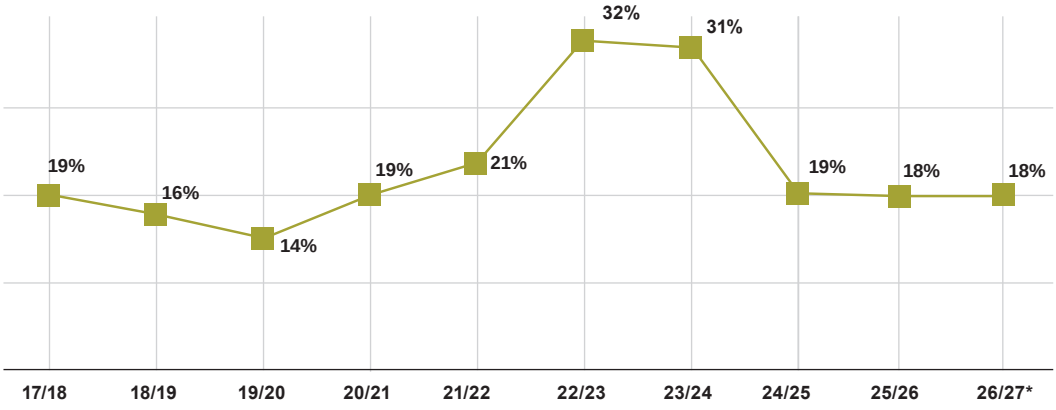
crop years 2015/16 vs. 2025/26



Source: USDA Incoming Receipts. Note: The varieties Butte, Padre and Butte/Padre are combined under Butte/Padre. Totals may not add precisely due to rounding.

CARRY-IN AS A PERCENTAGE OF PRIOR YEAR SHIPMENTS

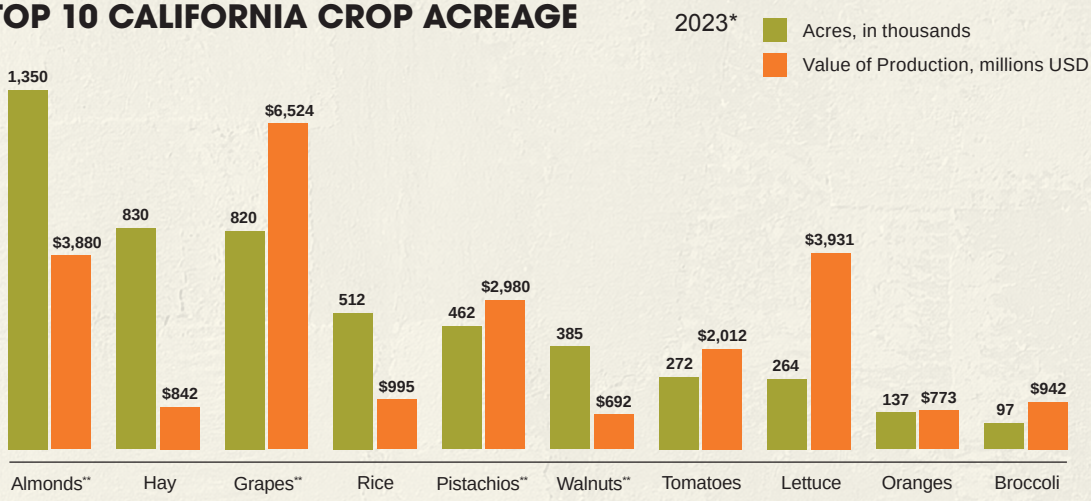
crop years 2017/18–2026/27



Source: Almond Board of California. *Forecasted.

ALMONDS + OTHER CROPS

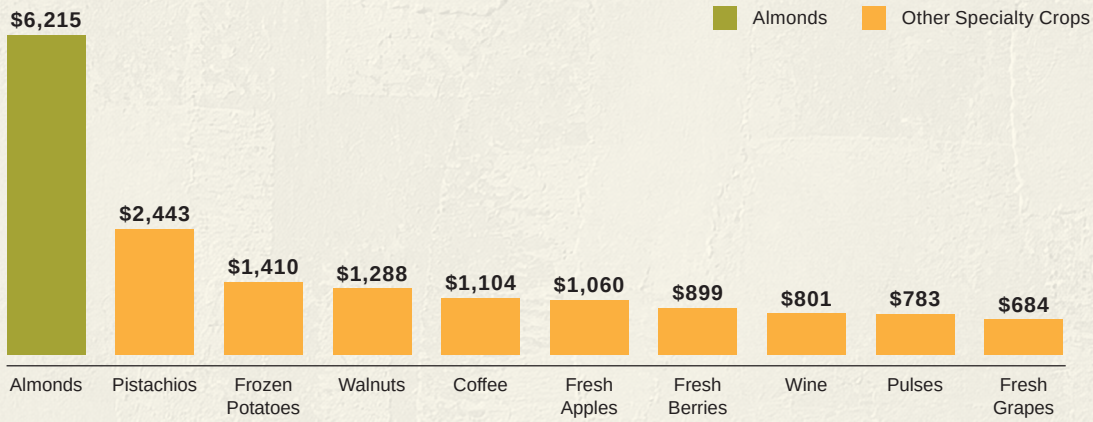
TOP 10 CALIFORNIA CROP ACREAGE



Source: California Department of Food and Agriculture, California Agricultural Statistics Review.
*Calendar year January through December 2023. Value based on farmgate prices. **Bearing acreage.

TOP 10 U.S. SPECIALTY CROP EXPORTS BY VALUE

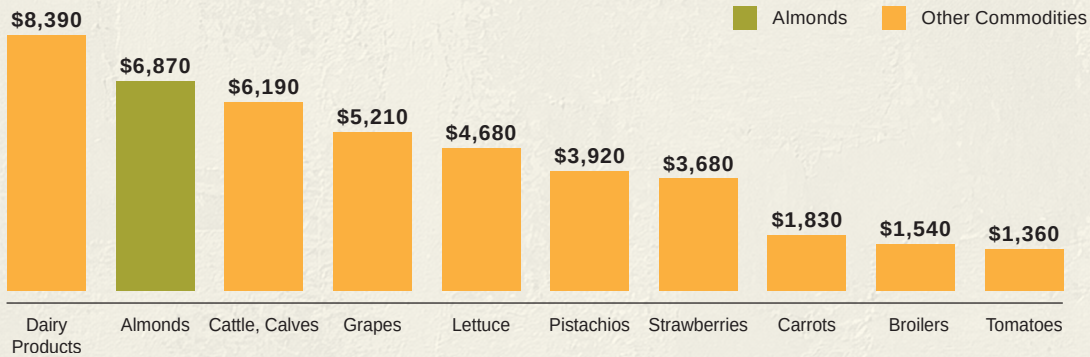
2025* | millions USD



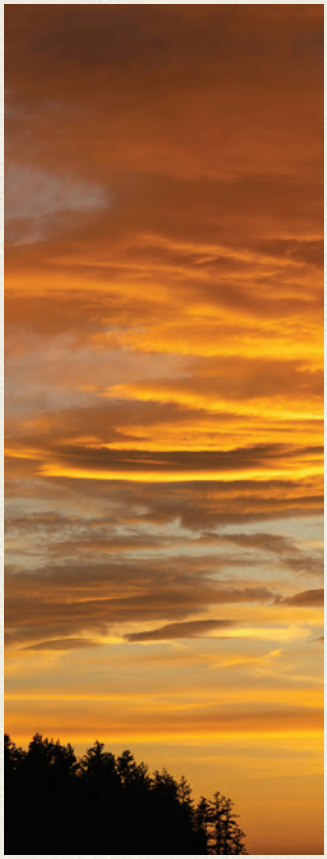
Source: U.S. Census Bureau Trade Data. *Calendar year January through December 2025.

CALIFORNIA'S TOP 10 VALUED COMMODITIES

2025 | millions USD



Source: California Department of Food and Agriculture/Statistics.



WHY CALIFORNIA?

HIGH STANDARDS

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

IDEAL CLIMATE

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

FAMILY FARMS

There are more than 7,600 almond farmers in California: **over 90% are family farms**, and 70% of orchards are 100 acres or less. In fact, **50% of farms are 1–49 acres**.

Many almond farms are **owned and operated by third- and fourth-generation farmers who live on their land** and plan to pass it on to their children and grandchildren.

Ninety-six almond handlers process California almonds. Many of these operations are also family owned.

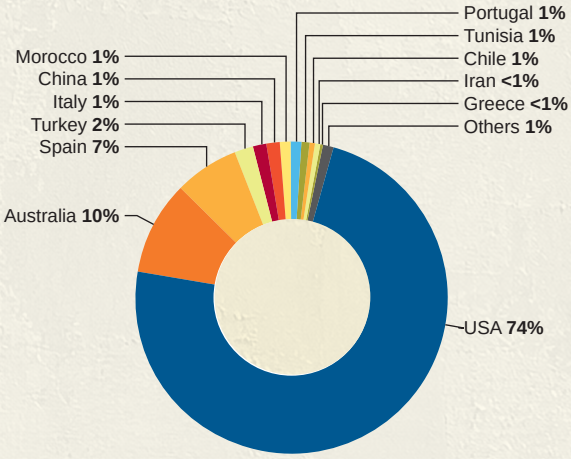
LEARN MORE ABOUT THE CA ADVANTAGE

GLOBAL LEADER IN ALMOND PRODUCTION

California is the #1 growing region for almonds due to its Mediterranean climate, renowned universities, strategic partnerships, robust water infrastructure and fertile soils. This unique blend of resources and expertise enables the state to supply a significant portion of the world's almonds and set industry standards in quality and environmental stewardship.

WORLD ALMOND PRODUCTION

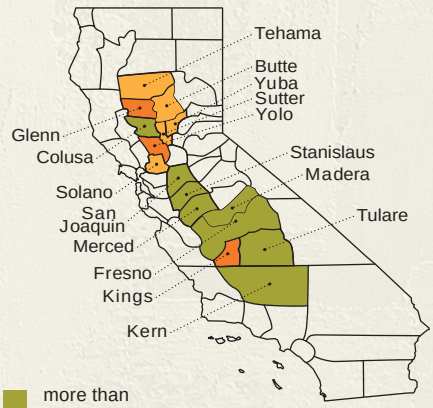
crop year 2025/26



Sources: Almond Board of California, Almond Board of Australia, Aegean Exporters' Association, Italian National Institute of Statistics, Chilean Almond Board, Greek Nuts & Fruits Trade Association and other INC sources.

CALIFORNIA ALMOND PRODUCTION

production by county | crop year 2025/26



Source: USDA Incoming Receipts.

THE 2026 ALMOND ALMANAC

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Brought to you by the Almond Board of California, this podcast explores how growers, handlers and other stakeholders are making things work in their operations to drive the almond industry forward. Find it now wherever you get your podcasts.

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