



2011 almond almanac

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california
almonds
Almond Board of California



THE CALIFORNIA
ALMOND INDUSTRY
AT YOUR FINGERTIPS

Almond Board of California (ABC) promotes almonds through its research-based approach to all aspects of farming, production and marketing on behalf of California Almond growers and processors. The Almond Almanac is Almond Board's annual report, which outlines the programs and projects that power the industry toward meeting its vision, and it provides a comprehensive statistical analysis of the production and marketing of California Almonds.

The Almond Almanac is prepared by ABC on a crop-year basis, spanning August 1 through July 31, and includes comprehensive historical information about almond production, acreage and varieties, as well as shipment and market information. The statistical content is compiled using various 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, California Field Office (NASS/CFO). Simply put, the Almond Almanac is the definitive source of information for California Almonds.



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BOARD OF DIRECTORS 2011

Vision

To bring great taste, health and vitality to people around the world through the enjoyment of California Almonds.

Mission

To make California Almonds essential to customers and consumers worldwide through innovative research, market development and industry support.



Mike Mason
Chair



Dave Baker
Vice Chair



Bill Brush



Bill Harp



Scott Hunter



Christine Long



John O'Shaughnessy



Dave Phippen



Keith Rigg



John Thoming



INTRODUCTION FROM CEO + BOARD CHAIR

Dear Industry Members and Allied Stakeholders,

2011 was a year of significant change for the Almond Board of California and the results of those changes are outlined in the pages of this year's Almond Almanac. Going forward in 2012, we will implement many of these changes and we'll see the benefits coming to fruition.

The year began with the Board of Directors' strategic retreat where new strategic priorities with supporting objectives for the organization were discussed and decided (see page 4). During the retreat the Board also worked through recommendations for organizational restructuring and considered ways in which the Directors themselves could become a better governing unit.

Later in the year, the Board of Directors commissioned an in-depth analysis of global markets and product categories in order to heighten its ability to have an objective vision of opportunities for growth, resulting in a road map for program prioritization and allocation of resources. In addition, the Directors authorized a fundamental change in the ABC's committee structure, instituting the Global Market Development Committee, which will allow for global strategic planning and program execution. These two achievements will play a significant role in driving demand development for California Almonds in the years to come.

Capping off the year was the creation of the Scientific Advisory Panel, a group of senior-level scientific and regulatory experts who will meet periodically to advise the Directors and ABC committees on the medium- and long-term threats and opportunities facing the industry. The panel's advice and counsel will be incorporated into strategic planning and proactive industry initiatives.

We wish you well in 2012 as we work together to market the largest crop in California Almond Industry history.

Richard & Mike

RICHARD WAYCOTT, PRESIDENT AND CEO

MIKE MASON, CHAIR



STRATEGIC PRIORITIES

ALMOND BOARD OF CALIFORNIA

Invest in programs and research that make almonds a Crop of Choice for California

- Promote sustainability of almond supply
- Enhance the industry-wide food safety system
- Identify and support basic and applied research to enhance production efficiency

Invest in programs and research that build market demand for almonds, making them the Nut of Choice

- Continue to expand the understanding of the health benefits and quality of almonds in support of market development strategies
- Implement programs to develop new markets and maintain existing ones
- Implement actions that mitigate trade barriers
- Improve market development resource allocation mechanisms and processes

Build an ABC organization that optimizes its effectiveness in establishing and executing goals

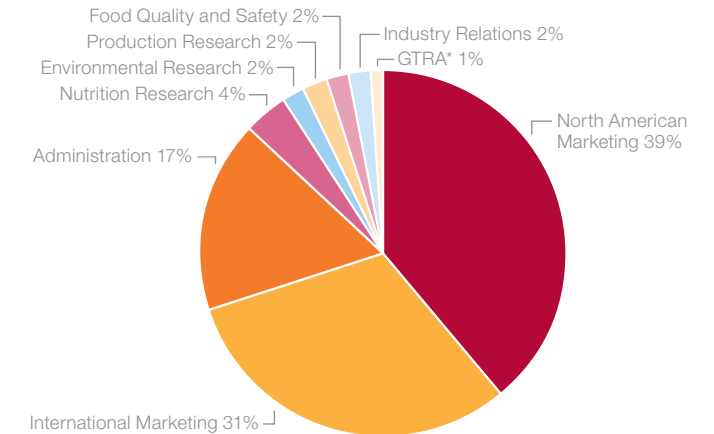
- Ensure that ABC representatives understand and adhere to fiduciary responsibility standards
- Implement Board of Director development initiatives, such as succession planning, formal orientation, board performance assessments and skills development and acquisition
- Optimize staff and committee structures and processes
- Articulate needs related to advocacy and seek out possible alternatives for meeting these needs



ALMOND BOARD OF CALIFORNIA PROGRAMS + BUDGET ALLOCATION

Key program areas for ABC include global marketing, nutrition and production research, food safety, environmental stewardship and industry information and statistics. ABC programs are funded by an assessment placed on each pound of almonds produced. The Board of Directors approves allocation to each of the program areas and ABC staff is responsible for implementing the programs detailed on the following pages.

PROGRAM BUDGET ALLOCATION FISCAL YEAR 2010/11



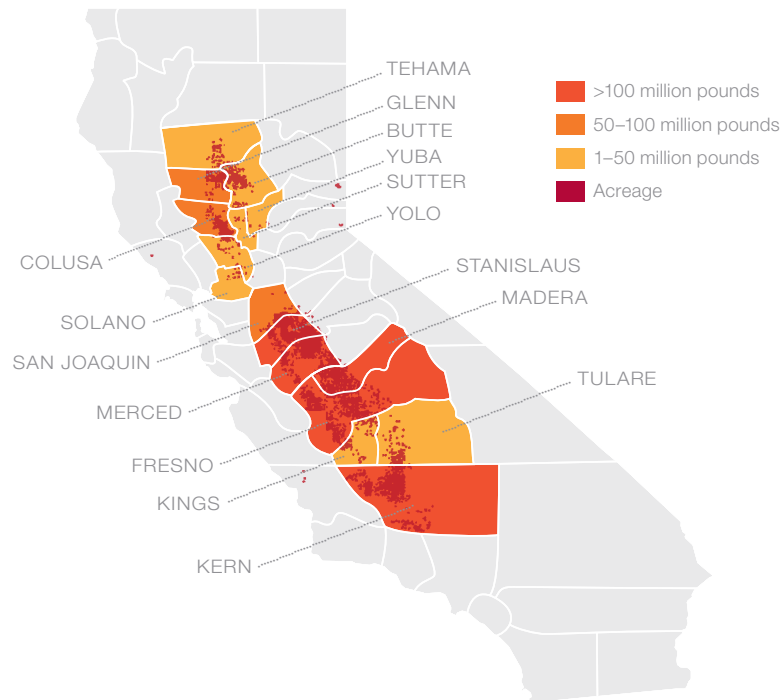
Source: Almond Board of California. *Global Technical and Regulatory Affairs.

CALIFORNIA ALMOND INDUSTRY OVERVIEW

California's Central Valley has the ideal growing conditions for growing almonds, including mild climate, rich soil and abundant sunshine. California Almonds make up about 80% of global and virtually 100% of domestic supply. According to the 2007 USDA Ag Census, there are around 6,500 California Almond farms and of those, 72% are family owned and 51% consist of 1–49 acres.

During the 2010/11 crop year there were 1.628 billion pounds of almonds produced on 740,000 bearing acres. In the same year, 104 handlers shipped a record-breaking 1.668 billion pounds of almonds, a 13% increase over the prior year.

ALMOND PRODUCTION BY COUNTY 2010/11



DISTRIBUTION OF CROP BY HANDLER SIZE 2010

104 Handlers	Number of Handlers	Percentage of Crop Handled
<1M pounds	33	1%
1–25M pounds	51	26%
26–49M pounds	12	25%
>50M pounds	8	48%

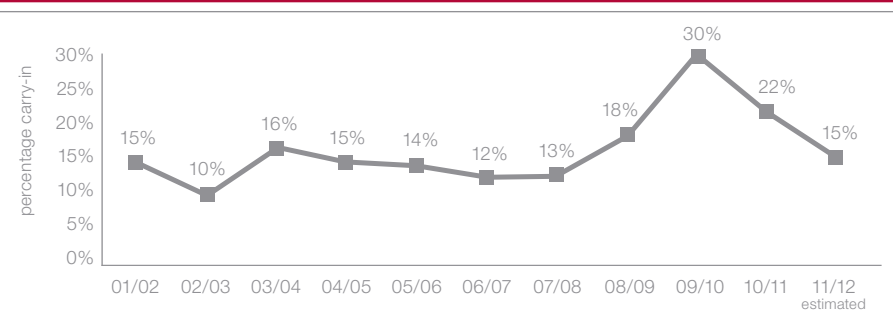


HISTORICAL SHIPMENTS

Although crop year 2010/11 production was a record breaker at 1.628 billion pounds, 2011/12, forecasted at 1.95 billion pounds, is destined to be the largest crop to date.

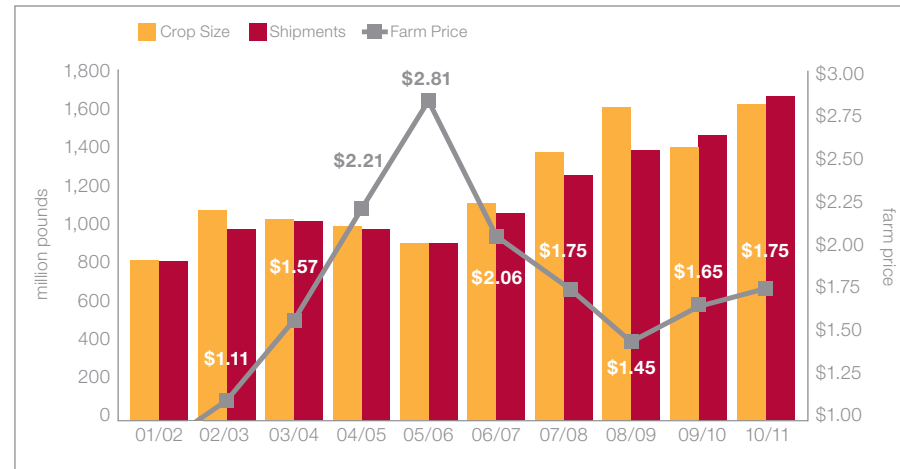
California Almond shipments increased 13% in 2010/11, reaching 1.668 billion pounds. U.S. remains the single largest market, up 9% to a new record of 490 million pounds and accounting for 29% of total shipments. The remaining 71% was destined for export markets where shipments rose 15% over the prior year to reach 1.18 billion pounds, also a new all-time record.

CARRY-IN AS A PERCENTAGE OF PRIOR YEAR SHIPMENTS CROP YEAR 2001/02–2011/12



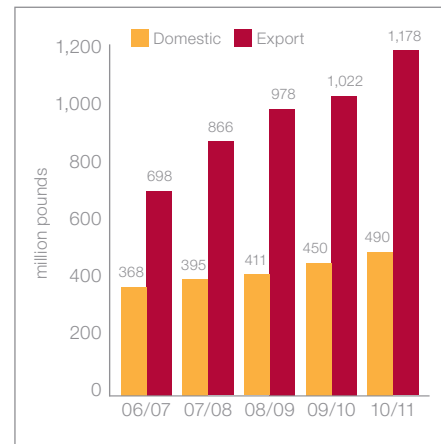
Source: Almond Board of California.

HISTORICAL CROP SIZE + SHIPMENTS VS. FARM PRICE CROP YEAR 2001/02–2010/11



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

DOMESTIC + EXPORT SHIPMENTS 2006/07–2010/11 (MILLION POUNDS)



Source: Almond Board of California.

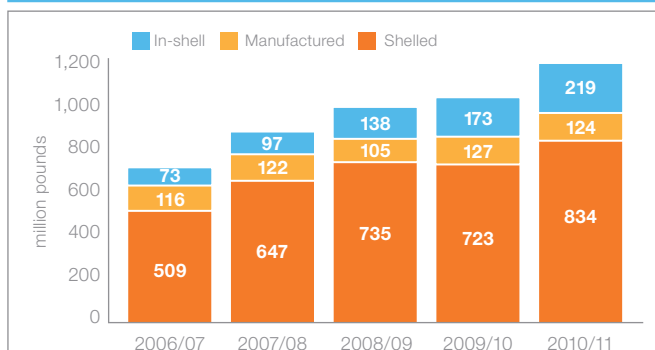
POSITION REPORT OF CALIFORNIA ALMONDS MILLION POUNDS

Crop Year	Redetermined Marketable	Carry-in	Reserve	Total Salable Supply	Domestic Shipments	Export Shipments	Total Shipments	Salable Carry-over
1992/93	516.0	148.1	N/A	664.1	186.0	349.9	535.9	128.2
1993/94	470.0	133.6	N/A	603.6	162.0	336.5	498.5	102.6
1994/95	713.3	102.6	0.0	815.9	160.6	448.1	608.7	204.8
1995/96	352.3	204.8	N/A	557.1	132.8	335.1	467.9	92.8
1996/97	489.3	92.8	N/A	582.1	137.5	395.8	533.3	48.3
1997/98	736.8	48.3	N/A	785.1	159.6	452.4	612.1	172.0
1998/99	492.4	172.0	N/A	664.4	167.0	405.5	572.5	91.8
1999/00	795.5	91.8	0.0	887.3	209.6	503.0	712.6	174.7
2000/01	672.4	174.7	0.0	847.1	211.2	528.7	739.8	107.3
2001/02	794.8	107.3	N/A	902.1	239.3	581.8	821.1	80.9
2002/03	1,063.5	80.9	N/A	1,144.4	291.7	690.6	982.4	162.0
2003/04	1,011.1	162.0	N/A	1,173.1	312.2	712.1	1,024.3	148.9
2004/05	972.8	148.9	N/A	1,121.7	331.6	652.5	984.1	137.7
2005/06	888.7	137.7	N/A	1,026.4	303.9	610.4	914.2	112.2
2006/07	1,087.8	112.2	N/A	1,200.0	368.3	697.8	1,066.1	133.9
2007/08	1,358.3	133.9	N/A	1,492.2	394.8	866.4	1,261.2	231.2
2008/09	1,571.9	231.2	N/A	1,803.1	411.0	978.4	1,389.4	413.7
2009/10	1,379.0	413.7	N/A	1,792.7	449.5	1,022.0	1,471.5	321.3
2010/11	1,600.3	321.3	N/A	1,921.6	489.7	1,177.9	1,667.6	254.0
2011/12*	1,891.5	254.0	N/A	2,145.5	555.0	1,295.0	1,850.0	295.5

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

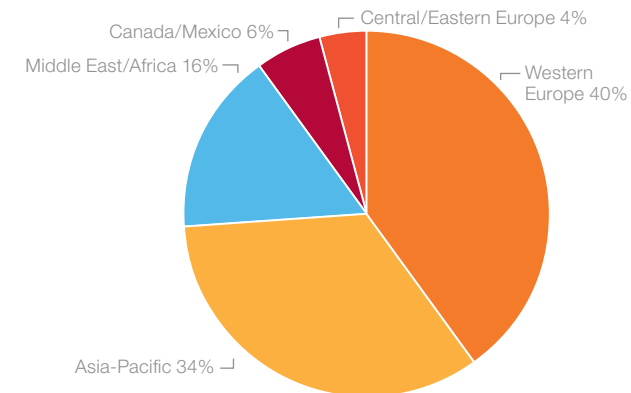
DESTINATION OVERVIEW OF CALIFORNIA ALMONDS

EXPORT SHIPMENTS BY PRODUCT TYPE CROP YEAR 2006/07-2010/11



Source: Almond Board of California July 2011 Position Report.

CALIFORNIA ALMOND EXPORTS BY REGION 2010/11



Source: Almond Board of California July 2011 Position Report.

TOP WORLD DESTINATIONS 2010/11



Source: Almond Board of California July 2011 Position Report.

EXPORTS BY DESTINATION MILLION POUNDS

World Region	Destination	2010/2011	2009/2010	2008/2009	2007/2008	2006/2007
AMERICAS						
North America	Canada	45.04	39.42	40.60	39.05	32.32
	Mexico	11.24	7.82	6.50	9.10	8.62
	Total North America	56.29	47.25	47.10	48.16	40.99
Latin America/Caribbean	Argentina	0.80	0.50	0.02	0.39	0.54
	Brazil	0.72	0.60	0.54	0.48	0.82
	Chile	6.12	6.96	3.06	3.96	3.73
	Colombia	0.63	0.38	0.26	0.28	0.25
	Peru	0.52	0.40	0.14	0.00	0.00
	Trinidad	0.45	0.43	0.31	0.23	0.21
	Venezuela	0.58	0.49	0.56	0.50	0.54
	Total Latin America/Caribbean	10.36	10.07	5.14	6.14	6.27
TOTAL AMERICAS		66.65	57.32	52.24	54.30	47.26
ASIA-PACIFIC						
Northeast Asia	China/Hong Kong	167.55	133.04	99.70	46.57	32.33
	Japan	55.82	52.93	48.99	47.08	48.72
	South Korea	32.07	25.69	21.21	16.77	11.56
	Taiwan	10.49	7.06	6.05	5.23	5.64
	Total Northeast Asia	265.93	218.72	175.96	115.65	98.26
Southeast Asia	Indonesia	1.40	1.38	1.37	0.96	1.14
	Malaysia	5.27	4.18	2.62	3.35	2.56
	Singapore	3.33	2.06	2.06	2.38	2.14
	Thailand	4.08	3.90	2.11	2.04	2.33
	Vietnam	2.91	4.27	0.91	2.05	1.31
Total Southeast Asia		17.10	15.97	9.22	10.89	9.59
South/Central Asia	India	106.03	83.93	86.85	72.79	58.47
	Nepal	0.04	0.14	0.07	0.04	0.03
	Pakistan	6.43	4.86	4.29	1.80	1.17
	Total South/Central Asia	113.35	89.02	91.67	74.81	59.67
Australasia/Oceania	Australia	2.13	2.47	2.23	2.21	4.06
	New Zealand	1.73	2.24	1.37	1.63	2.10
	Total Australasia/Oceania	3.86	4.71	3.61	3.84	6.17
TOTAL ASIA-PACIFIC		400.24	328.43	280.45	205.20	173.68
EUROPE						
Western Europe	Belgium	17.78	17.37	14.29	24.03	15.01
	Denmark	9.47	7.28	7.88	9.57	7.73
	Finland	1.45	2.82	1.29	1.15	1.20
	France	30.32	30.12	30.83	37.83	31.30
	Germany	113.16	109.04	105.69	105.11	92.43
	Greece	8.71	12.01	15.56	21.05	16.63
	Italy	43.07	34.64	37.33	43.40	33.17
	Luxemburg	0.00	0.00	0.00	0.00	0.22
	Malta & Gozo	0.03	0.06	0.07	0.07	0.00
	Netherlands	41.09	35.70	32.26	29.19	35.79
	Total Western Europe	350.10	325.31	328.95	393.35	302.58

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

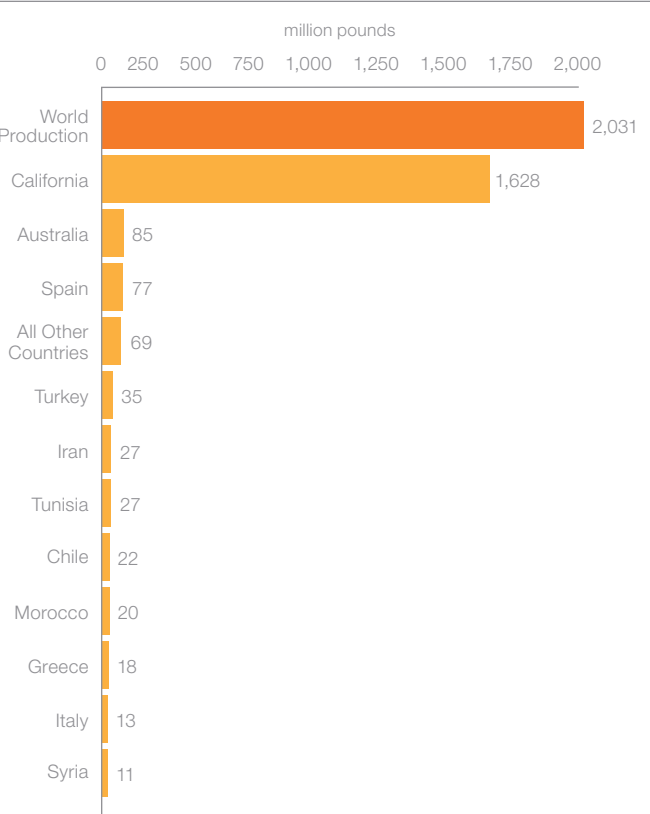
EXPORTS BY DESTINATION CONTINUED

World Region	Destination	2010/2011	2009/2010	2008/2009	2007/2008	2006/2007
EUROPE continued						
Western Europe	Norway	4.20	4.76	4.59	4.15	4.08
	Portugal	2.94	2.51	1.48	1.55	0.93
	Spain	158.34	143.36	158.62	157.04	101.33
	Sweden	7.47	6.35	7.17	5.56	5.68
	Switzerland	5.85	5.66	4.60	5.32	4.88
	United Kingdom	25.58	25.66	26.24	24.27	27.88
Total Western Europe		470.33	438.23	448.50	469.97	379.00
Central/Eastern Europe	Bulgaria	1.17	0.67	1.12	1.05	0.80
	Croatia	1.90	2.69	1.16	1.06	0.38
	Czech Republic	4.25	4.78	3.68	2.41	2.10
	Estonia	0.56	1.63	0.34	0.31	0.35
	Hungary	0.51	0.62	0.62	0.22	0.56
	Latvia	0.88	1.20	2.90	6.41	4.69
	Lithuania	1.80	1.54	1.27	1.26	0.51
	Poland	2.65	1.51	1.52	1.33	1.19
	Romania	0.83	0.38	0.46	0.54	0.18
	Russia	33.55	22.69	19.73	20.07	16.51
	Serbia	0.66	0.31	0.69	0.04	0.00
	Ukraine	1.80	1.09	1.22	1.66	0.41
	Total Central/Eastern Europe	51.87	39.90	35.16	36.71	27.90
TOTAL EUROPE		522.20	478.13	483.66	506.68	406.90
MIDDLE EAST/AFRICA						
Middle East	Bahrain	0.84	0.74	0.88	0.59	0.38
	Cyprus	1.14	1.42	1.23	1.78	1.03
	Israel	6.14	6.57	7.04	6.21	4.18
	Jordan	10.05	8.80	9.81	5.14	3.72
	Kuwait	2.76	2.37	2.15	2.08	1.84
	Lebanon	8.39	5.59	7.93	3.84	2.68
	Qatar	0.62	0.37	0.30	0.23	0.15
	Saudi Arabia	10.84	7.52	6.02	6.18	5.39
	Turkey	38.09	36.60	28.69	16.16	8.60
	United Arab Emirates	82.58	67.20	68.22	44.95	30.45
	Total Middle East	161.67	137.27	132.33	87.79	58.54
North Africa	Algeria	11.25	6.88	14.26	3.84	3.58
	Egypt	7.12	8.62	10.22	3.88	3.66
	Libya	1.04	0.13	1.08	0.78	0.24
	Morocco	0.59	0.95	0.91	0.88	0.93
	Tunisia	3.01	1.24	0.72	0.04	0.00
Total North Africa		23.01	17.81	27.19	9.42	8.41
Sub-Saharan Africa	South Africa	3.80	2.79	2.32	2.69	2.96
	Total Sub-Saharan Africa	4.13	3.00	2.47	3.00	3.00
TOTAL MIDDLE EAST/AFRICA		188.81	158.08	162.00	100.21	69.95
GRAND TOTAL EXPORTS						
		1,177.89	1,021.96	978.36	866.39	697.79

Note: Destinations that shipped more than 500,000 pounds are listed.

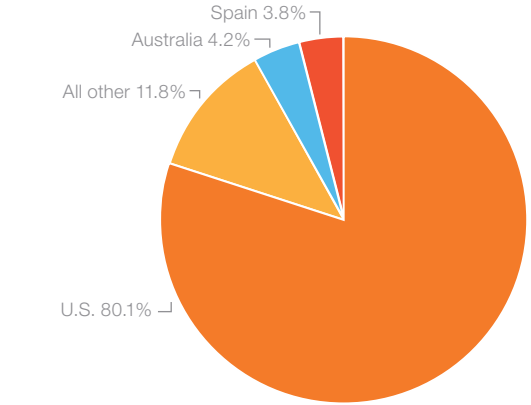
WORLD ALMOND PRODUCTION

WORLD ALMOND PRODUCTION 2010/11 (MILLION POUNDS)



Source: INC (International Nut and Dried Fruit), *The Cracker* 2011.
Note: "All Other Countries" includes eight countries.

PERCENTAGE WORLD ALMOND PRODUCTION 2010/11

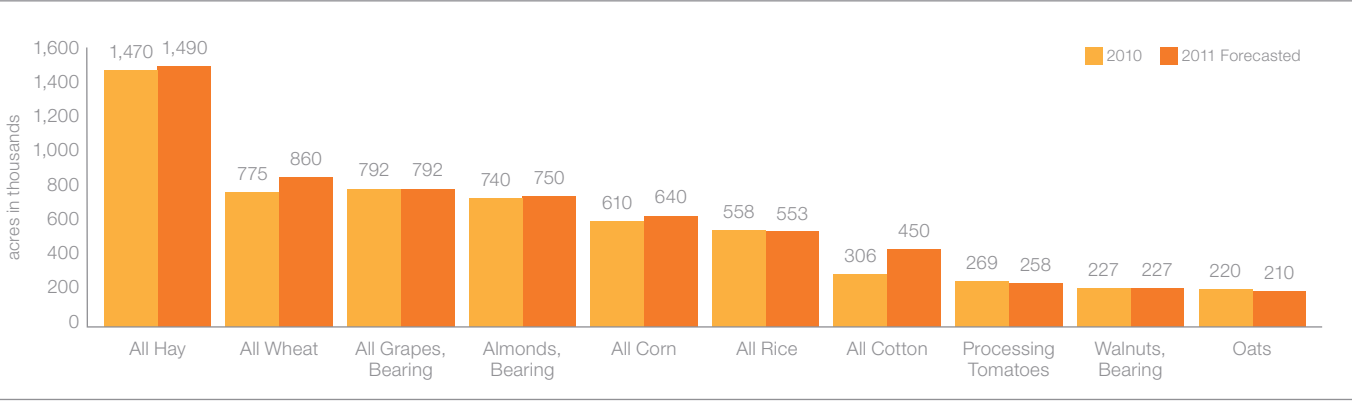


Source: INC (International Nut and Dried Fruit), *The Cracker* 2011.



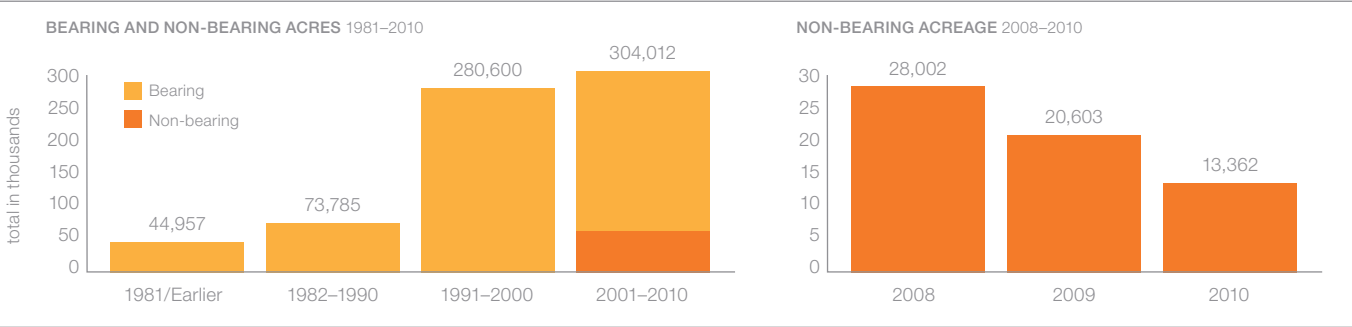
CALIFORNIA'S CROP + ALMOND ACREAGE

CALIFORNIA TOP TEN ACREAGE BY CROP TOTAL PLANTED OR BEARING CROP YEAR 2010/11



Source: USDA, NASS/CFO.

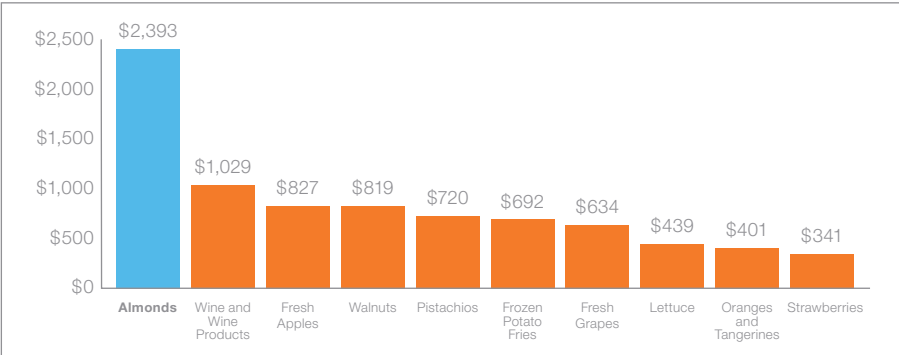
CALIFORNIA ALMOND ACREAGE BY YEAR PLANTED



Sources: USDA, NASS/CFO. Acres Standing 2010.
Note: Detailed data is voluntarily reported by growers to NASS/CFO; therefore, totals do not match annual USDA/NASS forecast.

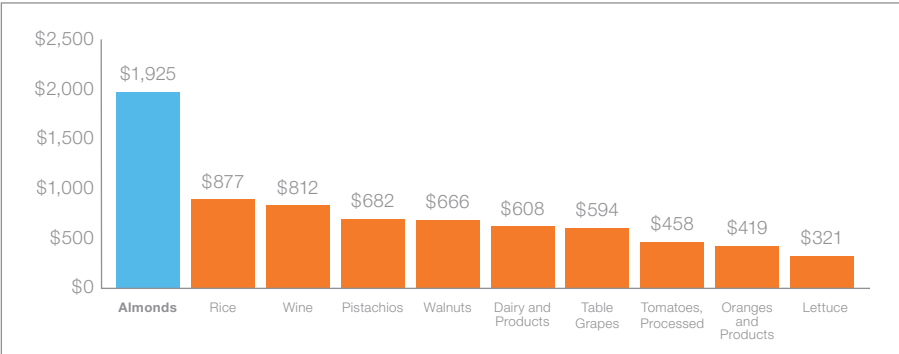
TOP TEN EXPORTS BY VALUE

TOP TEN U.S. SPECIALTY CROP EXPORTS BY VALUE 2010* (IN MILLIONS)



Source: Bureau of the Census, U.S. Department of Commerce, Foreign Trade Statistics.
*Calendar year January through December 2010.

TOP TEN CALIFORNIA AGRICULTURAL EXPORTS BY VALUE 2009* (IN MILLIONS)



Source: University of California, Agricultural Issues Center.
*Calendar year January through December 2009.



ALMOND PRODUCTION BY COUNTY MILLION POUNDS

Crop Year	SOUTHERN VALLEY COUNTIES								NORTHERN VALLEY COUNTIES						All Others	Total
	Kern	Fresno	Stanislaus	Merced	Madera	San Joaquin	Tulare	Kings	Colusa	Glenn	Butte	Yolo	Tehama	Sutter		
2001/02	167.0	131.5	139.3	110.6	80.5	46.3	15.8	5.8	31.8	29.3	49.1	4.3	5.7	4.1	2.2	823.3
2002/03	221.0	173.0	193.5	152.9	106.3	57.2	20.7	8.2	28.4	41.5	59.3	5.2	8.6	4.5	2.6	1,082.9
2003/04	205.9	176.9	169.3	129.3	94.5	55.3	18.5	12.3	55.0	42.3	50.0	6.6	8.0	5.7	4.1	1,033.6
2004/05	215.8	173.5	163.9	127.6	93.4	51.0	20.4	13.0	38.0	37.2	45.0	4.7	6.9	4.6	2.9	997.9
2005/06	210.1	160.1	132.2	102.1	82.4	41.8	15.9	12.0	40.3	42.6	50.4	5.6	8.4	4.6	2.7	911.4
2006/07	247.8	232.7	163.6	124.6	100.1	55.6	21.5	17.7	50.8	38.4	41.8	6.3	7.7	4.9	3.8	1,117.3
2007/08	271.0	253.8	223.3	172.9	125.3	75.2	26.7	17.9	66.2	51.8	66.7	10.0	11.4	5.6	5.1	1,383.6
2008/09	354.3	322.2	240.6	187.3	142.7	82.1	36.2	23.4	86.0	48.6	56.9	10.4	9.7	5.3	5.2	1,611.0
2009/10	317.9	281.9	198.8	156.7	112.3	70.7	32.6	20.6	75.7	52.7	49.2	12.4	10.9	5.2	4.9	1,402.6
2010/11	403.5	344.2	202.5	164.2	149.7	68.0	42.4	29.9	83.0	55.8	47.1	13.6	11.7	4.9	6.0	1,626.6

Source: USDA Form FV193, Report of Inedible Content of Almond Receipts. Note: Totals may not add precisely due to rounding.



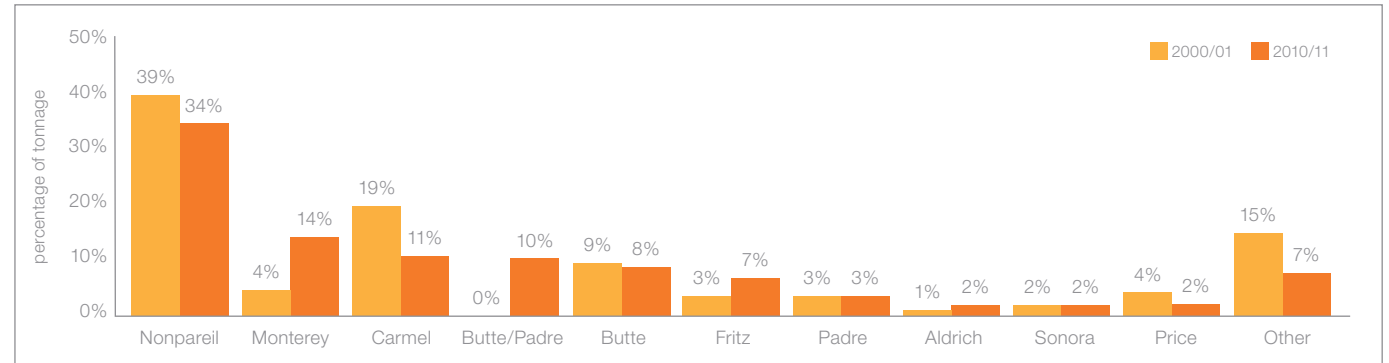
RECEIPTS BY COUNTY + VARIETY CROP YEAR 2010/11

Counties	% Crop	Nonpareil Lbs.	Monterey Lbs.	Carmel Lbs.	Butte/Padre Lbs.	Butte Lbs.	Fritz Lbs.	All Others Lbs.	All Varieties Lbs.
COAST COUNTIES									
Del Norte	0.02%	89,675	16,063	46,721	0	33,032	17,618	142,553	345,662
Monterey	0.01%	55,399	5,985	41,046	29,544	0	7,785	44,342	184,101
COAST TOTALS	0.03%	145,074	22,048	87,767	29,544	33,032	25,403	186,895	529,763
NORTH VALLEY									
Butte	2.90%	16,719,598	942,607	5,739,656	2,190,337	4,885,907	314,802	16,332,177	47,125,084
Colusa	5.12%	30,060,306	5,688,152	11,376,191	1,097,616	14,249,209	5,462,343	15,268,419	83,202,236
Glenn	3.43%	23,726,558	1,898,587	7,034,024	1,348,503	7,699,374	760,315	13,332,642	55,800,003
Sacramento	0.00%	29,354	0	0	0	0	22,460	7,885	59,699
Solano	0.27%	1,948,536	122,393	344,887	265,132	891,112	10,059	793,185	4,375,304
Sutter	0.30%	1,103,275	92,321	505,070	781,792	551,028	59,605	1,836,753	4,929,844
Tehama	0.72%	4,967,202	239,021	1,612,833	527,689	1,788,772	55,778	2,469,624	11,660,919
Yolo	0.83%	4,795,667	657,100	1,596,599	596,957	2,354,340	362,263	3,202,135	13,565,061
Yuba	0.05%	302,146	60,694	70,375	35,655	38,492	32,536	293,501	833,399
NORTH TOTALS	13.62%	83,652,642	9,700,875	28,279,635	6,843,681	32,458,234	7,080,161	53,536,321	221,551,549
SOUTH VALLEY									
Fresno	21.16%	115,757,954	60,767,648	24,578,932	40,034,101	31,611,141	17,920,391	53,574,779	344,244,946
Kern	24.81%	146,211,673	81,740,194	17,215,198	29,824,347	34,822,950	41,027,790	52,671,978	403,514,130
Kings	1.84%	11,082,825	4,379,727	1,277,070	6,294,106	781,454	2,816,781	3,235,703	29,867,666
Madera	9.21%	43,850,310	23,704,920	19,201,821	23,430,875	9,786,296	7,738,633	22,029,722	149,742,577
Merced	10.10%	50,650,473	18,447,877	26,108,235	17,278,007	11,276,285	8,770,106	31,716,141	164,247,124
San Joaquin	4.18%	22,692,468	2,530,132	14,921,026	9,675,896	3,335,348	5,141,250	9,726,989	68,023,109
Stanislaus	12.45%	65,092,787	16,700,088	38,927,865	25,192,717	10,086,623	10,444,525	36,035,582	202,480,187
Tulare	2.60%	15,974,050	6,205,926	1,880,324	4,147,250	3,720,792	4,894,172	5,420,122	42,242,636
SOUTH TOTALS	86.34%	471,312,540	214,476,512	144,110,471	155,877,299	105,420,889	98,753,648	214,411,016	1,404,362,375
ALL OTHERS									
Mariposa	0.00%	–	–	–	–	–	–	67,963	67,963
San Benito	0.00%	–	–	–	–	–	–	14,797	14,797
Tuolumne	0.00%	15,914	–	–	–	–	–	18,909	34,823
ALL OTHERS TOTALS	0.01%	15,914	0	0	0	0	0	101,669	117,583
YTD TOTALS	100.00%	555,126,170	224,199,435	172,477,873	162,750,524	137,912,155	105,859,212	268,235,901	1,626,561,270

Source: USDA Form FV 193, Report of Inedible Content of Almond Receipts.

TOP TEN ALMOND VARIETIES + ACREAGE

TOP TEN ALMOND-PRODUCING VARIETIES 2000/01 VS. 2010/11 PERCENTAGE OF TONNAGE



Source: USDA Incoming Receipts from FV 193 certificates reported to Almond Board of California.
Notes: Mission and Peerless varieties dropped off the top ten varieties during 2010/11. Butte/Padre first reported as a variety in 2004.

ALMOND BEARING ACREAGE CROP YEAR 2006/07–2011/12



Sources: USDA, NASS/CFO. 2010 Acreage Report.

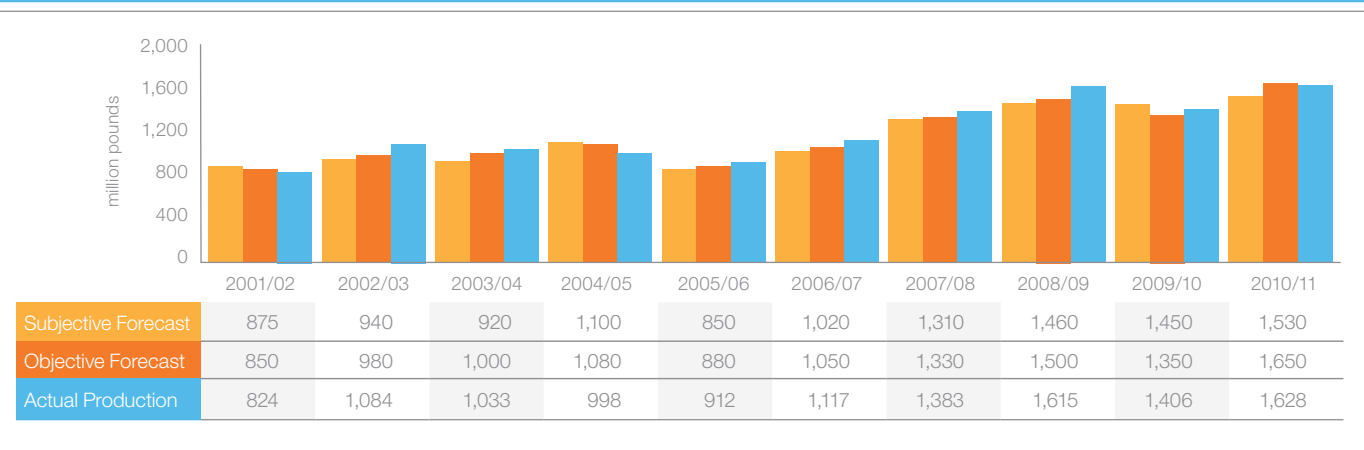
ALMOND CROP ESTIMATES VS. ACTUAL RECEIPTS MILLION POUNDS

Crop Year	Objective Forecast	Handler Receipts	Loss and Exempt	Redetermined Marketable Weight	Pounds Rejects in Receipts
1992/93	550.0	545.9	29.9	516.0	15.5
1993/94	470.0	488.2	18.2	470.0	9.8
1994/95	640.0	732.9	19.6	713.3	12.8
1995/96	310.0	366.7	14.4	352.3	10.4
1996/97	530.0	507.5	18.2	489.3	13.0
1997/98	680.0	756.5	19.7	736.8	14.3
1998/99	540.0	517.0	24.6	492.4	14.9
1999/00	830.0	829.9	34.4	795.5	9.3
2000/01	640.0	698.4	26.0	672.4	15.7
2001/02	850.0	824.1	29.3	794.8	16.7
2002/03	980.0	1,083.7	20.2	1,063.5	8.2
2003/04	1,000.0	1,032.9	21.8	1,011.1	19.8
2004/05	1,080.0	998.0	25.2	972.8	14.5
2005/06	880.0	911.7	23.0	888.7	16.0
2006/07	1,050.0	1,116.7	28.9	1,087.8	24.0
2007/08	1,330.0	1,383.0	24.7	1,358.3	17.2
2008/09	1,500.0	1,614.6	42.7	1,571.9	13.9
2009/10	1,350.0	1,405.9	26.9	1,379.0	19.6
2010/11	1,650.0	1,628.2	27.9	1,600.3	18.1
2011/12*	1,950.0	*	58.5	1,891.5†	*

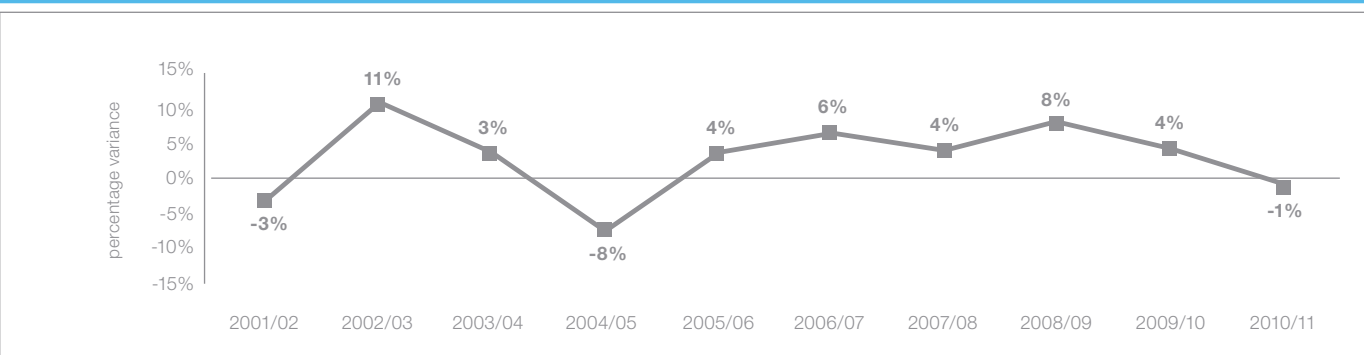
Source: Almond Board of California. Note: Objective forecast provided by USDA, NASS/CFO.

*Not available at time of publication. †Estimate.

ALMOND CROP ESTIMATES VS. ACTUAL RECEIPTS CROP YEAR 2001/02–2010/11



ALMOND RECEIPTS VARIANCE FROM FORECAST CROP YEAR 2001/02–2010/11



Source: Almond Board of California. Note: Objective forecast provided by USDA, NASS/CFO.

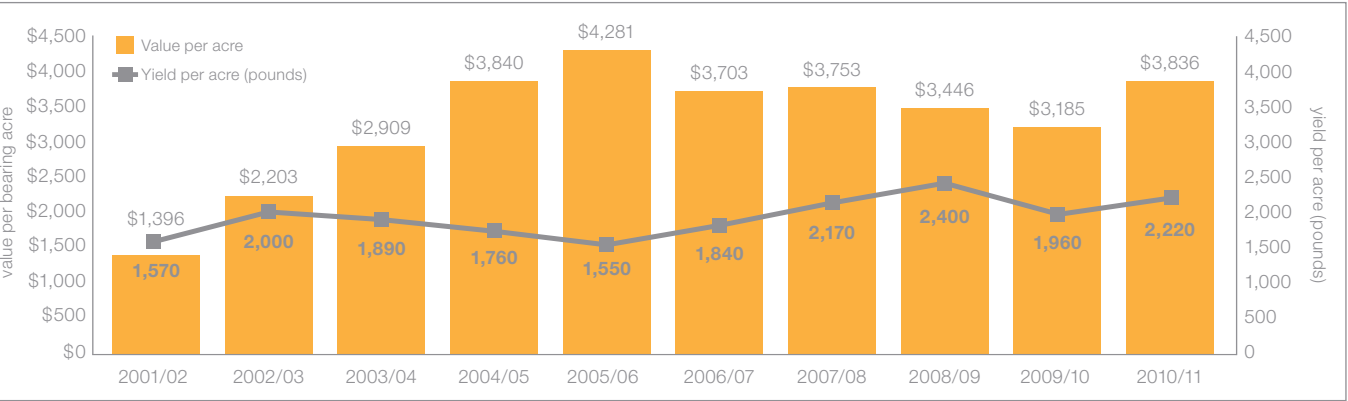
CALIFORNIA ALMOND ACREAGE + FARM VALUE

Crop Year	ACREAGE				YIELD		VALUE IN DOLLARS		
	Bearing	Non-Bearing	Total	New Plantings	Bearing Acre Yield (lbs.)	Production* (million lbs.)	Farm Price	Farm Value (\$1,000)	Value per Bearing Acre
2001/02	530,000	75,000	605,000	19,348	1,570	824.1	\$0.91	\$740,012	\$1,396
2002/03	545,000	65,000	610,000	15,857	2,000	1,083.7	\$1.11	\$1,200,687	\$2,203
2003/04	550,000	60,000	610,000	17,639	1,890	1,032.9	\$1.57	\$1,600,144	\$2,909
2004/05	570,000	70,000	640,000	36,220	1,760	998.0	\$2.21	\$2,189,005	\$3,840
2005/06	590,000	110,000	700,000	49,281	1,550	911.7	\$2.81	\$2,525,909	\$4,281
2006/07	610,000	145,000	755,000	35,486	1,840	1,116.7	\$2.06	\$2,258,790	\$3,703
2007/08	640,000	125,000	765,000	14,381	2,170	1,383.0	\$1.75	\$2,401,875	\$3,753
2008/09	680,000	115,000	795,000	21,678	2,400	1,614.6	\$1.45	\$2,343,200	\$3,446
2009/10	720,000	90,000	810,000	18,264	1,960	1,405.9	\$1.65	\$2,293,500	\$3,185
2010/11	740,000	85,000	825,000	13,362	2,220	1,628.2	\$1.75	\$2,838,500	\$3,836
2011/12†	750,000	‡	‡	‡	2,600	1,950.0	‡	‡	‡

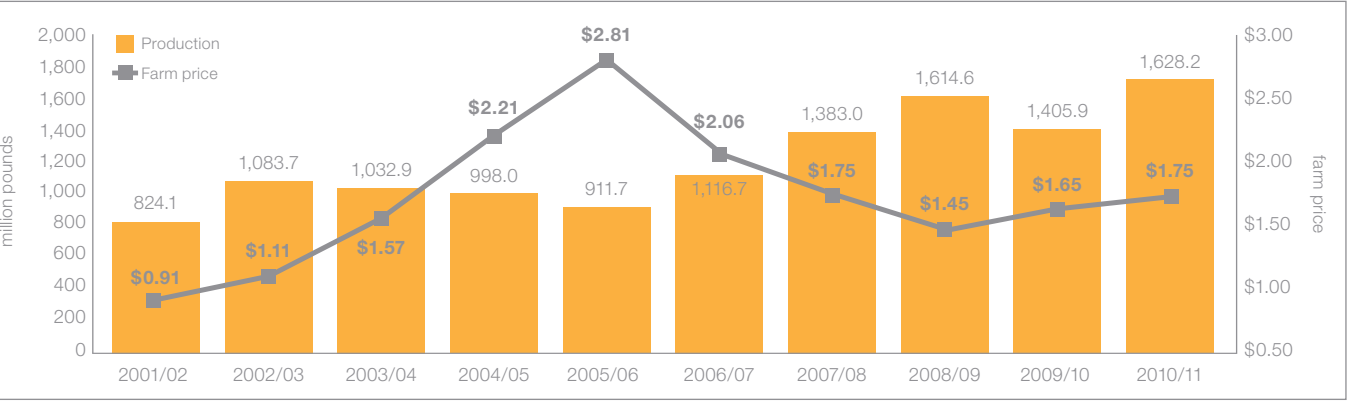
Source: USDA, NASS/CFO. Note: Almond Board of California does not track prices.
 *Production numbers provided by Almond Board of California. †Estimated. ‡Not available at time of publication.



CROP VALUE AND YIELD PER BEARING ACRE CROP YEAR 2001/02–2010/11

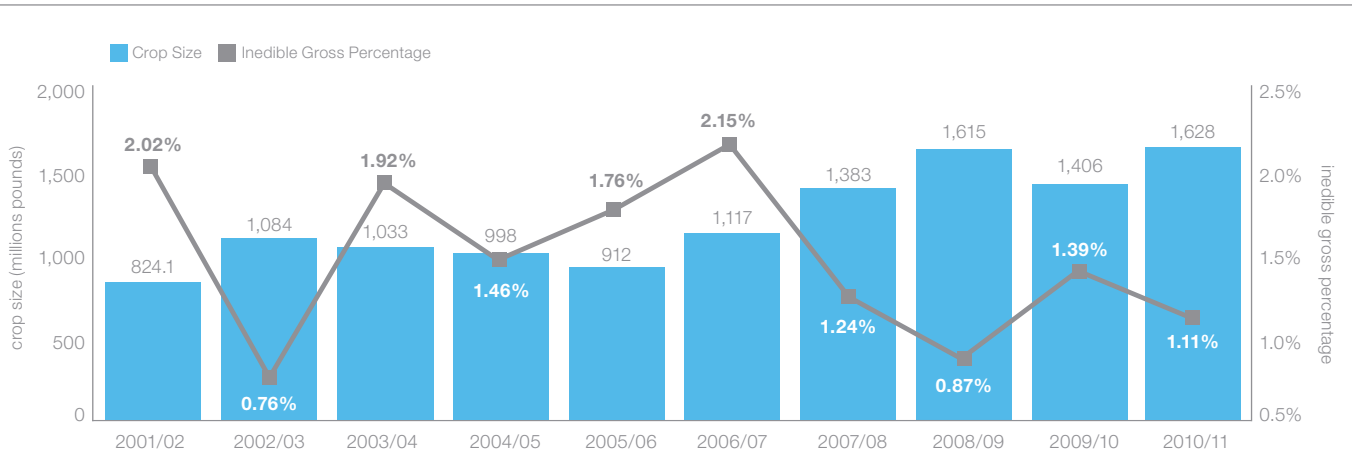


PRODUCTION VS. FARM PRICE* CROP YEAR 2001/02–2010/11



Source: USDA, NASS/CFO. Note: Almond Board of California does not track prices.
 *Production numbers provided by Almond Board of California.

CROP SIZE HISTORY VS. INEDIBLE PERCENTAGE CROP YEAR 2001/02-2010/11



Source: Almond Board of California.

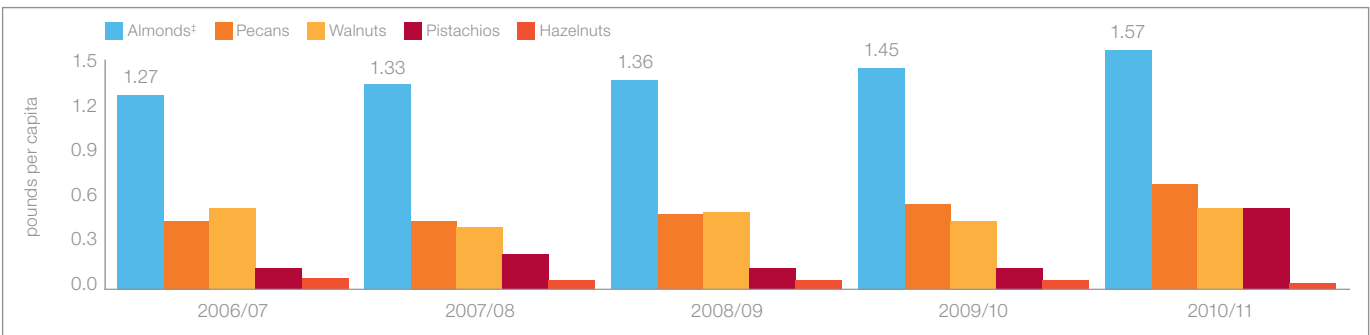


COMPETING NUTS

U.S. MARKETABLE PRODUCTION + IMPORTS OF COMPETING NUTS MILLION POUNDS (SHELLED BASIS)

Crop Year	ALMONDS		WALNUTS		HAZELNUTS		PECANS		PISTACHIOS		OTHER NUTS*	
	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports	Crop	Imports
2001/02	800.7	0.8	256.7	0.2	38.1	15.2	145.6	35.5	80.7	0.5	25.5	286.7
2002/03	1,063.5	1.9	240.5	0.2	15.3	16.4	78.4	41.7	149.5	0.8	26.7	301.7
2003/04	1,011.1	2.8	281.5	0.4	29.5	10.9	117.0	62.7	56.2	1.5	21.2	352.4
2004/05	972.8	5.7	288.4	0.8	27.2	12.8	82.6	81.2	170.5	0.8	18.7	402.4
2005/06	888.7	9.2	288.2	1.1	20.0	12.1	125.3	75.4	139.0	0.9	51.4	334.9
2006/07	1,087.8	8.1	294.6	2.3	36.4	13.5	91.4	57.0	119.0	1.4	27.8	358.8
2007/08	1,358.3	7.1	295.0	9.0	28.6	13.4	180.3	79.9	207.0	0.9	16.4	378.3
2008/09	1,571.9	4.2	395.5	2.0	26.2	10.0	94.3	61.9	135.4	0.9	32.7	360.4
2009/10	1,379.0	5.6	381.5	3.2	37.4	8.0	127.5	80.1	174.8	1.3	19.1	366.4
2010/11†	1,600.3	8.1	436.8	0.5	21.3	11.0	140.4	82.8	250.1	0.5	18.2	379.5

DOMESTIC PER CAPITA CONSUMPTION OF COMPETING NUTS CROP YEAR 2006/07-2010/11



Sources: USDA, Economic Research Service, *Fruit & Tree Nut Situation and Outlook*. Note: Marketable production is utilized production minus inedible and noncommercial use.
*Other nuts include brazil nuts, macadamia nuts, pine nuts, chestnuts, cashews and mixed nuts. †Preliminary. ‡Almond Board of California.

MARKETING PROGRAM INTRODUCTION

2010 marked the final year of the Board's previous marketing strategy, and so this year Almond Board of California undertook an initiative to develop a global market development analysis to help prioritize markets and resources for ABC programs in the next five to ten years. The analysis focused on identifying growth opportunities by market and category and classifying those opportunities as exploratory, emerging and established. Depending on a market's level of development, a combination of market access, trade stewardship and marketing programs will be utilized to further develop it.

To support the new global strategic approach, the Board of Directors aligned the ABC committee structure to the new approach by creating the Global Market Development Committee. This committee is charged with overseeing demand-building around the world, with two subcommittees that are focused on established markets with long-term, stable growth and emerging markets that are rapidly growing but have volatile trade conditions.

One of the most significant changes to the programs will be a broadening of the marketing focus globally to a comprehensive approach that includes market access, trade stewardship and marketing. The new committees will use the phased approach below to develop markets at various stages of almond familiarity and use.



MARKET DEVELOPMENT ACTIVITY BASED ON MARKET CLASSIFICATION



Source: Global Market Development Analysis report, 2011, Deloitte Consulting.

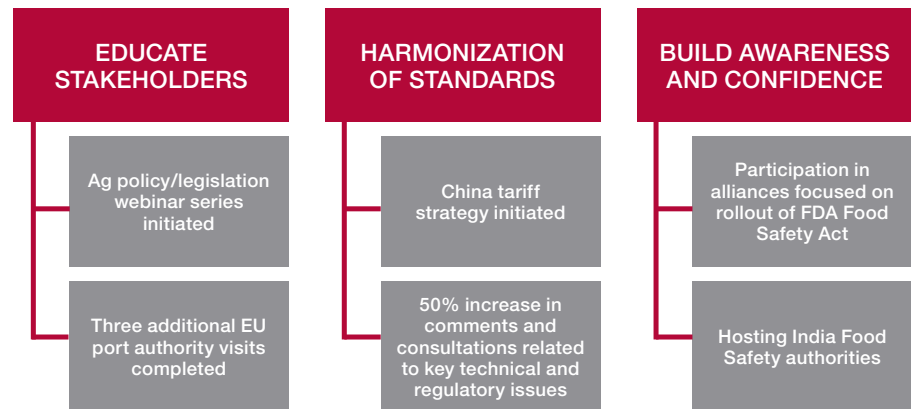
MARKET ACCESS

GLOBAL TECHNICAL AND REGULATORY AFFAIRS (GTRA)

An essential element of the market development strategy, in the U.S. and abroad, is addressing those regulatory or import requirements that could disrupt the normal flow of almonds, impact customer perception or compromise positive promotional efforts. The objective is to provide support and synergy to the other Almond Board of California committees, focusing on those issues that impact the production and worldwide marketing of California Almonds.

During 2011, the Board's efforts to address technical and trade-related issues continued to draw heavily on trade/governmental relationships, leveraging coalitions and building alliances to overcome technical or trade barriers. Efforts focused on assessing the landscape for almond tariffs in China, identifying where harmonized pesticide standards are needed, as well as working together with other industry alliances in monitoring the rollout of FDA's regulations under the new Food Safety Modernization Act. Solutions are often time-consuming and complex, requiring good science as well as education of stakeholders about industry practices.

GTRA STRATEGIC PRIORITIES 2010/11



TRADE STEWARDSHIP

OVERVIEW

Almond Board of California recognizes that one key barrier to continued and expanded use of almonds among food professionals, whether they are a food importer or food manufacturer, is almond experience and knowledge. ABC programs fill the information gap with technical and functional research to educate buyers and users on the characteristics of almonds that make them work so well in many product applications, as well as building an arsenal of nutrition, market and consumer research to communicate the value-adding benefits of almonds. Key markets of focus for these education efforts have been Russia, Poland and China—emerging economies that are quickly developing food-processing sectors to meet growing consumer demand for nutritious, delicious products. Through seminars, trade missions, trade shows, materials such as the Technical Information Kit and communications such as newsletters, ABC has been able to reach a growing number of importers, distributors, food manufacturers and retailers to convey the great opportunity of doing business with the California Almond industry and affirming California Almonds’ position as the Nut of Choice.



Almond technical information kit.



Russian chocolate information brochure.



Almonds and print materials displayed at Poland trade workshop.



TRADE STEWARDSHIP

CHINA TRADE PROGRAM

Almond Board of California has prioritized market development activities in China since this market shows enormous potential in market conditions and environment that are aligned with



Student competition product judging.

the benefits that almonds provide. To maintain California Almonds’ place in the forefront of food professionals’ minds, ABC carries out programs to educate importers, distributors, food manufacturers and retailers about the function, form and flavor; the value and versatility of almonds; and the quality, safety and stability of California’s Almond supply. One cornerstone program that is unique to the ABC China trade stewardship program is the annual food science student almond innovation competition. This successful competition serves as a platform to communicate to food manufacturers about the multiple possibilities of innovating with almonds, and engages them in an activity that fosters dialogue about the positive development of the Chinese food industry with California Almonds as a key partner. In addition, the California Almond industry benefits from the exposure to a large student base; many of these students will go on to be at the forefront of product development in the Chinese food industry.

ANNUAL PARTICIPATION IN CHINESE STUDENT INNOVATION COMPETITION

2004–2011

	2004	2005	2006	2007	2008	2009	2010	2011
Proposals	17	32	12	64	91	209	401	809
Universities	1	1	1	5	8	36	29	56
Students	68	128	48	256	364	1,020	2,000	3,785

Source: Almond Board of California.

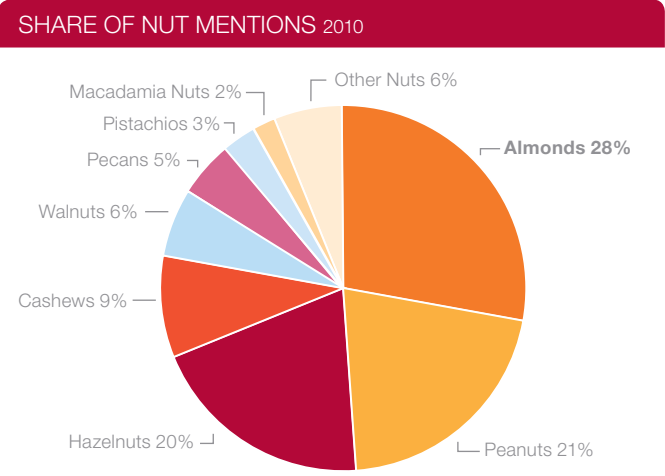
TRADE STEWARDSHIP

FOOD PROFESSIONAL

For the third year in a row, almonds are the number one nut in global new product introductions, and from 2008 to 2010, products with almonds increased 69%. The Almond Board of California Food Professional program highlights almonds as an essential ingredient in products that drive the most almond volume (i.e., chocolate, cereal and snacking), reaching research and development, general management and marketing at global consumer packaged goods firms.

INTRODUCTIONS BY NUT TYPE 2008–2010				
Nut	2008	2009	2010	% Change (2008–2010)
Almonds	2,818	3,663	4,757	69%
Peanuts	2,019	2,494	3,562	76%
Hazelnuts	2,311	3,029	3,440	49%
Cashews	805	1,072	1,502	87%
Walnuts	566	705	977	73%
Pistachios	274	424	558	104%
Pecans	380	682	934	146%
Macadamia Nuts	153	315	417	174%

Source: Innova New Product Database and Sterling-Rice Group, Global New Product Introductions Report, 2010.



Source: Innova New Product Database and Sterling-Rice Group, Global New Product Introductions Report, 2010.

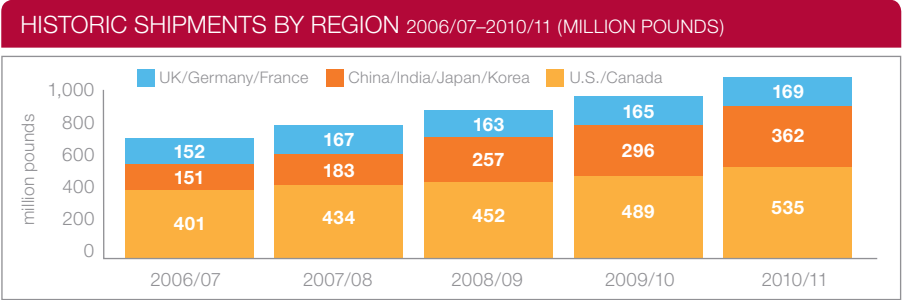


MARKETING

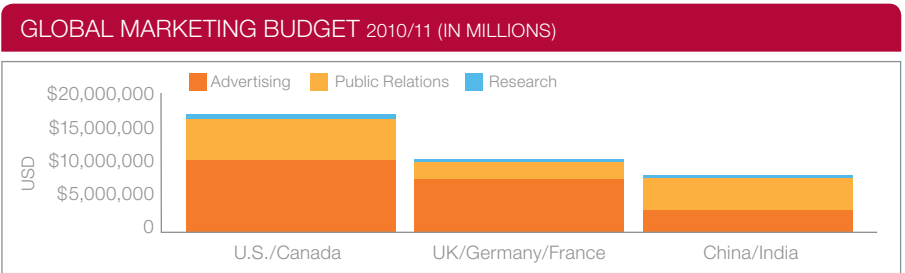
OVERVIEW

In FY 2010/11, Almond Board of California continued to focus its marketing efforts in the following core countries: U.S., UK, France, Germany, China, India and Canada. Marketing programs in each of these countries focus on earning the advocacy of consumers, food professionals and health professionals. Over the past year, marketing campaigns in each country focused on ABC's strong nutrition research base; however, ABC began establishing a more emotional connection to almonds through comprehensive public relations and advertising campaigns.

Shipments to each of these countries continue to rise. North America remains the single largest market for California Almonds, while shipments to Asia-Pacific continue to rise significantly due to the growth in the Chinese market, surpassing Spain for the first time.



Source: Almond Board of California.



Source: Almond Board of California.

MARKETING
ADVERTISING

To bring a more emotional connection to almonds to life, Almond Board of California launched several new advertising campaigns in India, the United Kingdom and United States this past year.

INDIA
ABC advertising to Indian women started in September 2010, with a campaign featuring Bollywood actress Karisma Kapoor, right before the peak consumption period in North and West India, which includes the Diwali festival and winter months. Television and print advertisements were used to remind women of the traditions of eating almonds and provide new ideas that make almonds relevant for today. The campaign continued in the fall of 2011 to build momentum for the Diwali festival. Consumer research is underway to launch a new campaign in 2012.

UNITED KINGDOM
A new campaign was developed following extensive consumer market research that revealed a gap in nutritious, natural snacks in the European market. In January 2011, the first-ever print and online advertising campaign launched in the United Kingdom targeting food- and health-involved women. The ads, themed around the contents of women's handbags, stand out and demonstrate how almonds are an essential, convenient and delicious snack. The campaign rolled out across 18 key consumer print titles and 10 websites, including *Good Housekeeping*, *Tesco Magazine* and *iVillage.co.uk*.

UNITED STATES
ABC actively targets U.S. Healthy Men to communicate why they should choose a handful of almonds over other snack foods. Healthy Men are food and health involved and are looking for simple ways to improve heart health and maintain their weight. A new TV campaign, "Hearts Love Almonds," focuses on the heart-health benefits of almonds to demonstrate why they are a smart snack choice. To convey this message, the campaign introduces a symbolic heart to tell viewers why almonds are a smart choice. The TV campaign will run October 2011–March 2012 with ads running on ESPN and Discovery Channel, allowing ABC to reach Healthy Men when they are highly engaged in sports and outdoor/active content.



India print campaign leverages Diwali festivals and traditions to communicate health benefits of California Almonds.



UK print handbag campaign focuses on the convenience of snacking on California Almonds.



U.S. Healthy Men TV campaign focuses on heart-health benefits of almonds.



MARKETING
NORTH AMERICA

Investment in the North American core consumer target audience, Jane, has been very strategic and has driven growth with the growing support of other target audiences, including Healthy Men. The decision in this investment can be attributed to the long history of market research in North America. The research continues to inform marketing campaigns with illuminating insight, both demographic and psychographic, into our consumer target audiences. This has enabled Almond Board of California to continue to take the California Almond message to Jane and Healthy Men where and when it is relevant to them.

According to the 2011 Consumer Attitudes, Awareness, and Usage (AAU) study, for the first year, almonds are tied with cashews for the number one nut associated with snacking. And, for the third year in a row, almonds were the top nut for self-reported ongoing usage.

Jane: Women age 35+, the primary grocery shopper, actively tries to eat a healthy diet and enjoys trying new foods or new recipes.
Healthy Men: Men age 18+, actively tries to eat a healthy diet and likes to engage in physical activities regularly.

CONNECT AT A FUNCTIONAL + EMOTIONAL LEVEL			
A product with almonds is...			
	2010	2011	Change
Contemporary	70%	72%	+2% point
Worth more money	57%	63%	+6% point
Special to serve to family and friends	77%	80%	+3% point
Prefer to have almonds rather than other nuts	57%	61%	+4% point

Source: 2011 North American AAU.

OWN HEART HEALTH ACROSS ALL TARGETS			
Heart Healthy* (percentage rating almonds excellent or good)			
	2010	2011	Change
Total	83%	83%	—
Jane	91%	91%	—
Healthy Men	86%	87%	+1% point

Source: 2011 North American AAU. *Consumer Attitudes, Awareness, and Usage Report, Sterling-Rice Group, 2011.

STRENGTHEN POSITION AS A TASTY, NUTRITIOUS FOOD						
	Almond taste scores (scale of 1–10)			Almond health scores (scale of 1–10)		
	2010	2011	Change	2010	2011	Change
Total	8.0	8.1	+0.1	8.4	8.6	+0.02
Jane	8.7	8.8	+0.1	9.1	9.3	+0.02
Healthy Men	8.4	8.5	+0.1	8.7	8.9	+0.02

Source: 2011 North American AAU.

MARKETING

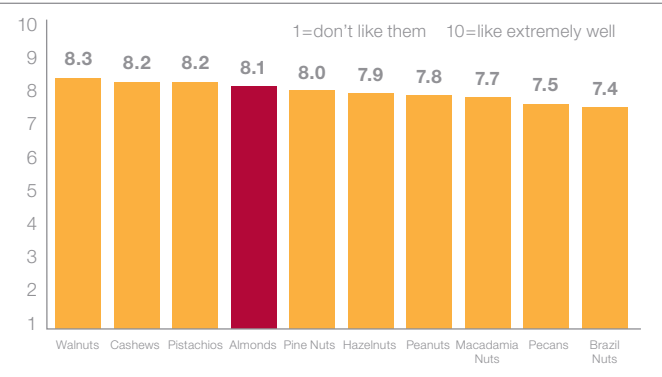
CHINA

In FY 2010/11, China became the top export destination for California Almonds, growing 26% from the previous year to a 168 million pound market. This emerging market continues to be a focal point for Almond Board of California investment across all three areas of market access, trade stewardship and marketing. ABC aims to increase awareness to this market by communicating key almond messages to consumers through advertising. ABC's current consumer marketing efforts in China target women with increasing purchasing power and aspiration to be on trend in their product purchases. California Almonds are a solution to these women who are time strapped and looking for nutritious food for themselves and their families as they balance their career-focused lifestyles. Recent consumer research has shown that almonds are among the nuts Chinese consumers like most, however, there is opportunity for almonds to lead the pack and become the nut of choice in the hearts and minds of consumers. Further research is currently being conducted to take an in-depth look at consumers' behaviors and attitudes toward almonds, which will contribute to developing a new strategic approach to consumer marketing in China.

ALMOND ATTRIBUTE RATINGS IN CHINA*			
Good for the brain	85%	Something that will fill me up	76%
Premium	83%	Low in saturated fat	76%
Nutritious	82%	Easy to eat on the go	75%
High in protein	81%	High in magnesium	75%
Good for beauty/skin	81%	High in vitamin E	75%
A healthy snack	80%	Low in calories	74%
Great tasting	78%	Versatile	73%
Natural	78%	A source of fiber	73%
A food I crave	78%	Helps you manage your weight	68%
Rich in antioxidants	78%	Lower priced	45%
Heart healthy	76%	Average	76%

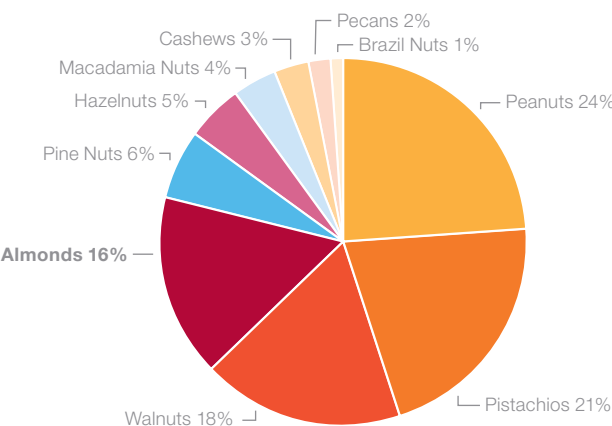
Source: 2011 Global Perceptions Study and Sterling-Rice Group, 2011.
*Percentage selecting excellent or good.

LIKING OF NUTS IN CHINA ON A SCALE OF 1-10



Source: 2011 Global Perceptions Study and Sterling-Rice Group, 2011.

NUT EATEN MOST OFTEN AS A SNACK IN CHINA



Source: 2011 Global Perceptions Study and Sterling-Rice Group, 2011.

PUBLISHED PAPERS 2011

Hull Split Date and Shell Seal in Relation to Navel Orangeworm (Lepidoptera: Pyralidae) Infestation of Almonds

Kelly Hamby, Ling Wang Gao, Bruce Lampinen, Thomas Gradziel, Frank Zalom
Departments of Entomology & Plant Sciences, UC Davis, Davis, CA; China Agricultural University, Beijing, China
Journal of Economic Entomology (2011)104(3)

Comparison of Trapping for Eggs, Females, and Males of the Navel Orangeworm (Lepidoptera: Pyralidae) in Almonds

Charles S. Burks, Bradley S. Higbee, Joel P. Siegel, David G. Brandl
USDA, ARS, Parlier CA
Environmental Entomology (2011)40(3)

Risk of Salmonellosis from Consumption of Almonds in the North American Market

Elisabetta Lambertini, Michelle D. Danyluk, Donald W. Schaffner, Carl K. Winter, Linda J. Harris
Departments of Food Science and Technology, University of California, One Shields Ave., Davis, CA Department of Food Science and Human Nutrition, Citrus Research and Education Center, University of Florida, Lake Alfred, FL, Department of Food Science, Rutgers University, New Brunswick, NJ
Food Research International (2011)

Climate Change Affects Winter Chill for Temperate Fruit and Nut Trees

Elke Luedeling, Evans H. Girvetz, Mikhail A. Semenov, Patrick H. Brown
World Agroforestry Centre (ICRAF), Nairobi, Kenya, The Nature Conservancy, Seattle Washington, United States of America, Rothamsted Research, Harpenden, United Kingdom, Department of Plant Sciences, University of California Davis, Davis, CA
PloS One (2011)6(5)

Image Analysis of Microstructural Changes in Almond Cotyledon as a Result of Processing

Aylin Altan, Kathryn L. McCarthy, Rohan Tikekar, Michael J. McCarthy, and N. Nitin
Department of Food Science & Technology, UC Davis, CA
Journal of Food Science, (2011), 76

A Review of Composition Studies of Cultivated Almonds: Macronutrients and Micronutrients

Sylvia Yada, Karen Lapsley, Guangwei Huang
Guelph, Ontario, Canada, Almond Board of California, Modesto CA
Journal of Food Composition and Analysis, (2011), 24

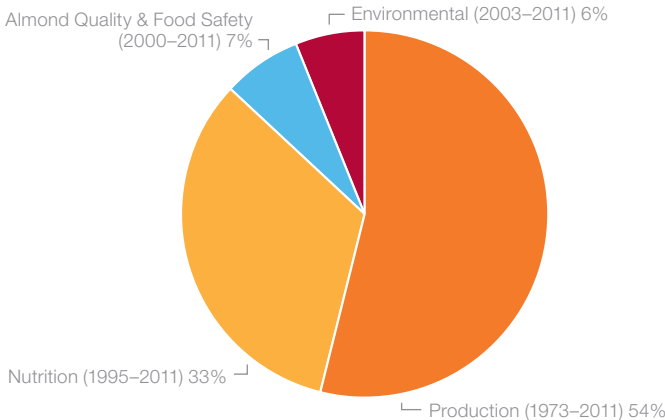
RESEARCH PROGRAM INTRODUCTION

LEADERSHIP THROUGH RESEARCH

Thanks to a comprehensive research program established in 1973, the California Almond industry is a recognized leader in agricultural productivity, environmental stewardship, almond quality, food safety and almond health-benefits research. In 2011, technology transfer to almond growers and users ranged from grower meetings to the conference proceedings, Almond Board of California website and over 20 published papers in high-impact scientific journals.

One of the key outcomes of the 2011 ABC Board of Directors strategic retreat is the creation of an external Scientific Advisory Panel to provide strategic mid/long-term research, based on changing market dynamics and emerging stakeholder priorities. Their first priority is to give input on future almond production research and extension needs based on the current and projected federal and state budget cuts.

ABC RESEARCH INVESTMENT-\$35 MILLION 1973-2011



Source: Almond Board of California.

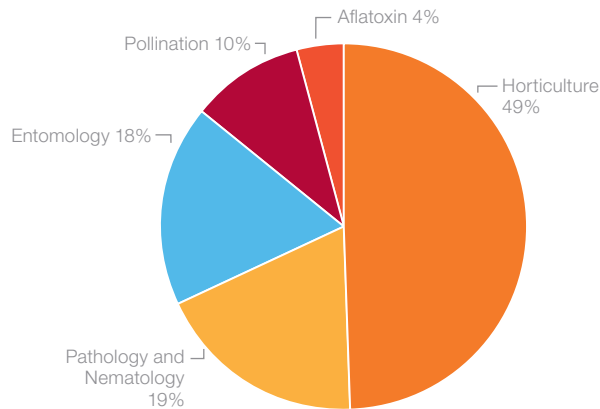
PRODUCTION RESEARCH

For nearly 40 years, the California Almond industry has invested in research that not only has increased yield, improved quality and production efficiency, but also contributed to environmental stewardship and food safety.

One example is Almond Board of California-funded horticultural and irrigation research, which has been the driver for substantial increases in average yield per acre. Research has led to advances in micro-irrigation and irrigation scheduling, tree nutrition, variety selection, rootstocks, planting patterns and minimal pruning practices.

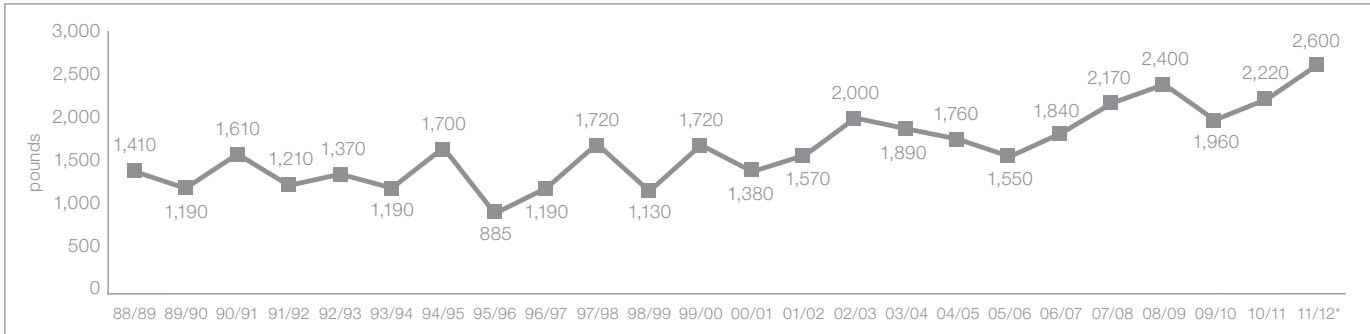
ABC research programs have an eye on the future. Numerous investigations currently underway in diverse disciplines are aimed at increasing production efficiency, maintaining quality and minimizing environmental impact. Examples include developing bio-rational pesticides, targeted sprayer application, numerous efforts to reduce the need for replant fumigation, developing a nutrient budget approach to fertilization and even better irrigation monitoring and scheduling, fungicide resistance management and disease forecasting, and harvest and stockpile best practices.

PRODUCTION RESEARCH KEY AREAS 2010/11



Source: Almond Board of California. Note: Percentages are reflective of FY 2010/11 budget.

AVERAGE YIELD PER ACRE CROP YEAR 1988/89–2011/12



Source: USDA, NASS/CFO. *Estimate.

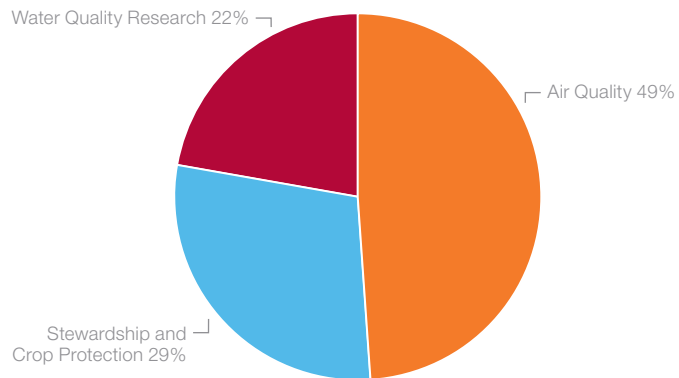
ENVIRONMENTAL RESEARCH

ENVIRONMENTAL EXCELLENCE

To address the complex environmental and regulatory concerns facing almond growers, the Environmental Committee (EC) funds research and education projects. Last year, roughly 50% of budget was spent on research focusing on reducing the environmental impact of almond growing. In some cases the research develops data needed to inform the regulatory process. In air quality, the research focuses on soil-fumigant-emission reductions and greenhouse-gas emissions and offsets from the orchard; water quality research focuses on reducing runoff and drift in surface water as well as understanding nutrient management better for enhanced efficiency.

The remainder of the funding goes to Environmental Stewardship Outreach, including the California Almond Sustainability Program (see page 38), which ensures almond growers are kept abreast of changing environmental regulations and hosts the annual Environmental Stewardship Tour. This year's tour in May brought out regulators in air, water and pesticides who saw how almonds are grown and the efforts growers make to be good stewards of the land.

ENVIRONMENTAL RESEARCH + OUTREACH KEY AREAS FOR 2010/11

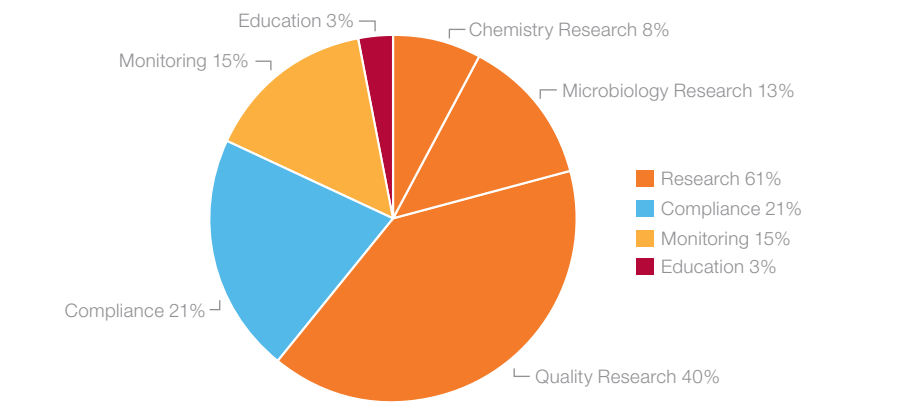


Source: Almond Board of California. Note: Percentages are reflective of FY 2010/11 budget.

ALMOND QUALITY + FOOD SAFETY

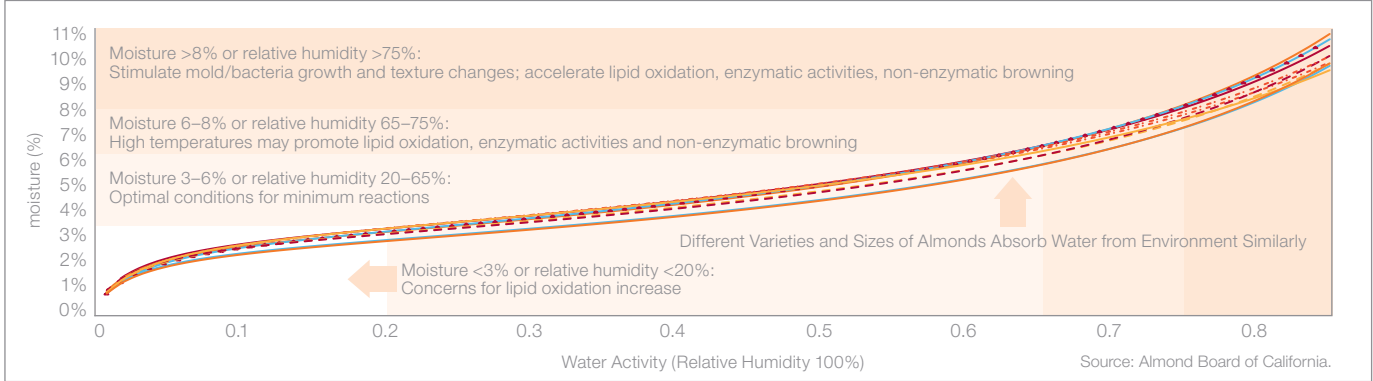
Investment in research and monitoring programs to ensure the safety and quality of California Almonds continues to be a cornerstone of what our industry is about. In 2011 almond quality research focused on moisture management, including effects of environmental humidity and temperature; accuracy of moisture measurement; and effects of harvesting conditions on concealed damage. Results to date confirm and clearly demonstrate the negative impact of high humidity and temperature on quality. An online modeling tool will be created to assist in estimating shelf-life based on factors such as product moisture and storage environment. Food safety from farm to fork remains a priority, with almond growers and handlers committed to providing a safe and wholesome product.

ALMOND QUALITY + FOOD SAFETY KEY AREAS 2010/11



Source: 2010/11 Food Quality and Safety Committee Actual Spending. Note: Percentages are reflective of FY 2010/11 budget.

MOISTURE-MANAGEMENT-FOCUSED ALMOND QUALITY RESEARCH 2010/11



NUTRITION RESEARCH

Over the past year, Almond Board of California funded nutrition research that resulted in ten published papers, focused on the subjects of heart health, diabetes and prediabetes, phytochemicals and allergens. Regional public relations efforts were conducted around the published papers supporting marketing strategies focused on heart health, weight management and diabetes;¹⁻⁴ illustrating the nutrition benefits of almonds in these important subject areas. Additionally, more than 20 conference presentations were given on these topics, as well as on the subject of weight management, building on the breadth and depth of research in these key nutrition areas.

For 2011-2016, the ABC Nutrition Research Committee stressed that ABC must remain proactive to protect and expand consumers' mind-set about the healthfulness of almonds globally by ongoing confirmation of heart-health benefits, understanding how best to recommend almonds for heart health and continuing to address calorie concerns and impact on body weight.

1. Berryman, C.E., et al. 2011. Effects of almond consumption on the reduction of LDL-cholesterol: a discussion of potential mechanisms and future research directions. *Nutrition Reviews*. 69(4):171-185.

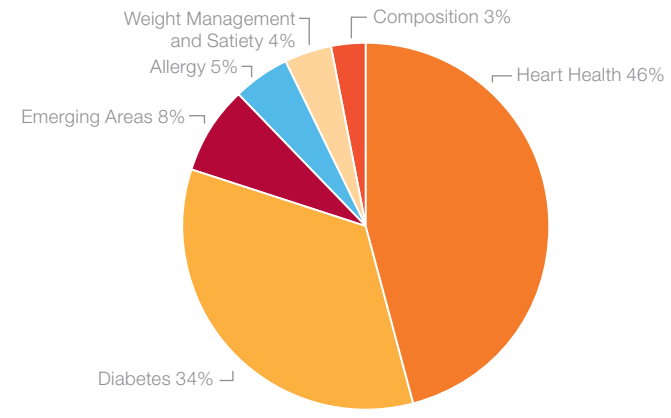
2. Jaceldo-Siegl, K., et al. 2011. Influence of body mass index and serum lipids on the cholesterol-lowering effects of almonds in free-living individuals. *Nutr. Metab. Cardiovasc. Dis.* 21:S7-S13.

3. Li, S.-C., et al. 2011. Almond consumption improved glycemic control and lipid profiles in patients with type 2 diabetes mellitus. *Metab. Clin. Exp.* 60:474-479.

4. Mori, A.M., et al. 2011. Acute and second-meal effects of almond form in impaired glucose tolerant adults: a randomized crossover trial. *Nutr. & Metab.* 8(6):1-8.



NUTRITION RESEARCH KEY AREAS 2010/11



Source: Almond Board of California. Note: Percentages are reflective of FY 2010/11 budget.

Strategic Areas 2011-2016	Research FY 2010/11		Nutrition Research Outreach FY 2010/11		
	Ongoing Projects	New Projects	Presentations	Papers Published	Submitted for Publication
Heart Health & Beyond	2	3	3	2	1
Diabetes & Prediabetes	2	2	4	3	1
Weight Mgmt., Satiety & Gut Health	1	—	5	—	5
Phytochemicals—Content & Action	—	—	3	2	2
Allergens	2	—	2	2	1
Other Areas	2	1	4	2	3
TOTALS	9	6	21*	11	13

Source: Nutrition Research 2010/11 Year-end Report. *U.S.—10, Asia —7, Europe—3, Other—1.

SUSTAINABILITY PROGRAM

Documenting the thoughtfulness and the continued effort to work toward being sustainable is critical to ensuring that almonds remain a crop of choice to grow in California.

To both document and encourage the cycle of continuous improvement, a sustainability program based on grower self-assessments of a range of practices was initiated in 2009 with two modules (irrigation management and tree nutrition). During 2010, three additional modules (pest management, air quality and energy) were added and the number of almond operations that have participated reached nearly 200. Analysis to date indicates that almond growers are generally using more thoughtful practices, but there are also areas for improvement. The focus of the coming years will be expanding grower participation and the addition of several more modules.

18 GROWER WORKSHOPS TO DATE IN 2009–2011

198 SELF-ASSESSED OPERATIONS
(ABOUT 2% OF GROWERS)



California Almond Sustainability Program Workbooks.



SAVE THE DATE:

**The Almond
Conference 2012**
December 11–13, 2012

**Sacramento
Convention Center**

INDUSTRY CONFERENCE

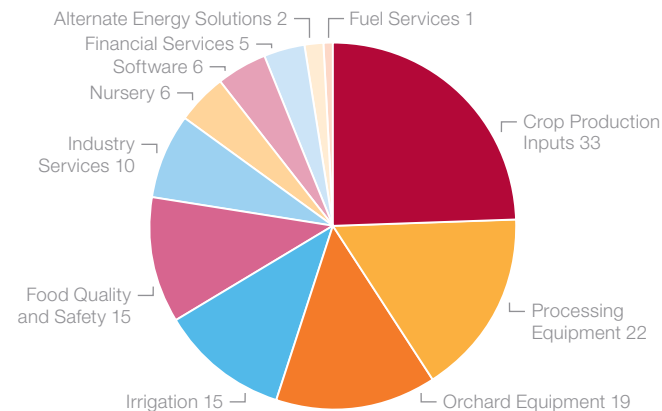
2012 represents the 40th anniversary of The Almond Conference and we want you to celebrate with us!

The Almond Conference is the premier event of the year and continues to serve as the single largest gathering of growers and members of California's Almond industry. In 2012 we are going bigger and better by moving to a new location. As conference attendance continues to grow, we recognize the need to secure a convention site that allows the event to grow with the industry. Moving to the Sacramento Convention Center will accommodate all our needs: more meeting rooms for special symposiums, convenient hotel locations and an expanded exhibit hall.

This expanded three-day event will allow growers, handlers and allied industry members more time to attend Almond Board of California-funded research program updates, poster sessions and customized workshops, and to network with other industry members. Attendees from all backgrounds are presented the opportunity to participate in multiple presentation tracks that cover everything from production research to regulatory and marketing hot topics. These hot-topic sessions respond to broad-based industry interests, whether it is changes to import requirements, environmental regulations or promotional initiatives to grow consumer demand.

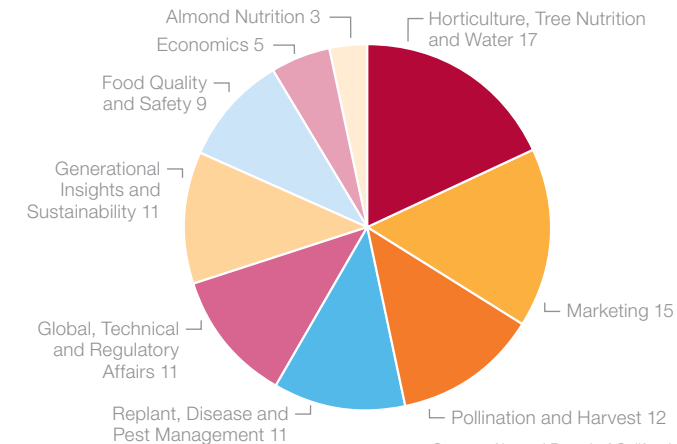
To learn more about The Almond Conference, visit AlmondBoard.com/conference and be sure to save the date and join us for the big move to Sacramento, scheduled December 11–13, 2012.

NUMBER OF EXHIBITORS BY CATEGORY 2011



Source: Almond Board of California Conference Registration.

CONFERENCE TOPIC AREAS 2006–2011

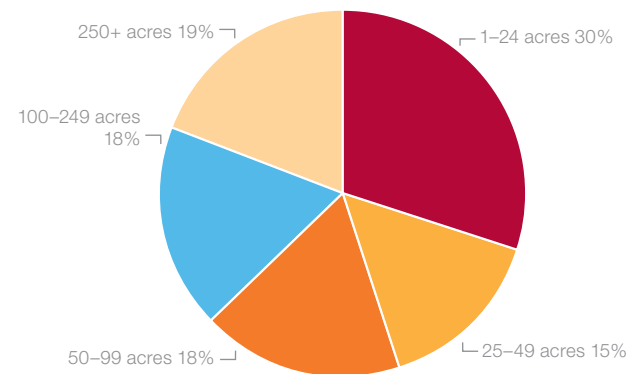


Source: Almond Board of California.

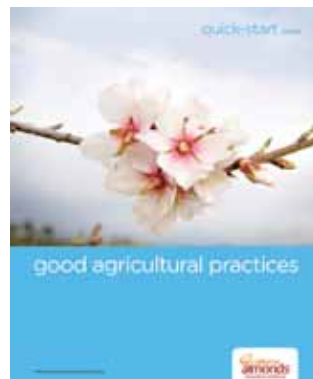
INDUSTRY RELATIONS

The California Almond industry is diverse. Growers and handlers range in acreage, size and use of technology. This diversity fuels the need for different forms of communication according to how growers and handlers prefer to receive information about the industry. The Almond Board of California's Industry Relations (IR) Program remains committed to providing growers, handlers and other industry stakeholders with the most recent tools, information, research and resources to assist them with the management of the many challenges the California Almond industry encounters, including those challenges of local and global communities. ABC resources include traditional printed publications, like the *California Almond Outlook* and articles in agricultural publications, as well as the use of electronic media, such as Twitter, eNewsletters and the ABC website. The IR Program publishes various manuals and quick-start guides that assist growers and handlers with their daily operations. In addition, the program provides education, leadership and training opportunities through a variety of programs and internships.

DIVERSITY OF ACRES FARMED 2010



Source: Published in Grower Survey Results 2010.



The Good Agricultural Practices Quick-Start Guide.



California Almond Outlook.



The Almond Industry Leadership Program trains future almond generations.

"The ABC Leadership Program gave me a chance to step out of my sphere of influence and be exposed to new experiences and relationships in our industry. From local grower to international issues, the program has opened my eyes to how interconnected we are in the almond industry today. I highly recommend it for anyone with a taste for learning, a passion for California Almonds and a willingness to expand one's horizons."

Tera McGowan, Leadership Program Participant, 2011



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