

THE ALMOND CONFERENCE

50

YEARS

THANK YOU TO THE ALMOND CONFERENCE 2022 METAL SPONSORS!





We Want to Hear from You!

The Almond Board is conducting research to understand your experiences, perceptions and needs/wants of The Almond Conference. This information will improve future conferences. During the conference, we'll conduct several focus group sessions and short individual interviews.

Focus Group Sessions

These will be in Room 15 (Level 2—across from Ballroom B-5) during the following times:

Wednesday, December 7, 2022

- 9:30–10:30 a.m.
- 11:45 a.m.–12:45 p.m.
- 4:00–5:00 p.m.

Thursday, December 8, 2022

- 10:30–11:30 a.m.

If you are interested in being a part of the focus group, please use this QR code to select a time!



Short Individual Interviews

Throughout the conference, Vivayic, the research organization, will also ask select attendees about their conference experiences.

Vivayic will have a neon yellow ribbon on their name badges that says, **“Tell me more.”**

Please take a few moments to provide your insights if asked.

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Almond Exports: What's the 2023 Trade Picture Look Like?

December 7, 2022

Moderator: Julie Adams (ABC)

Speakers: Sara García Figuera (Prospero)

Clay Hamilton (USDA FAS)

Keith Schneller (ABC)

Jonathan Hoff (Monte Vista Farming)

Almond Board Strategic Objective: Support a Favorable Trade & Regulatory Environment

1

Understanding and Trust: *for what we grow, and how we grow*

2

Right to Grow: *an environment that allows almonds to be grown and marketed*

3

Education: *of stakeholders on the impact of regulations, agreements and standards*

Leverage data, relationships, and initiatives to help the industry produce, ship, and market almonds with minimal disruption or obstacles

Diverse Trade Challenges...

Expand understanding and trust

Foster harmonization and equivalence

Educate stakeholders – telling our story

California, Federal:

- California regulatory environment
- SGMA implementation
- FSMA regulations
- Dietary Guidelines

Europe:

- Green Deal
- Mirror clauses
- Pesticide MRLs
- Pre-Export Checks

China:

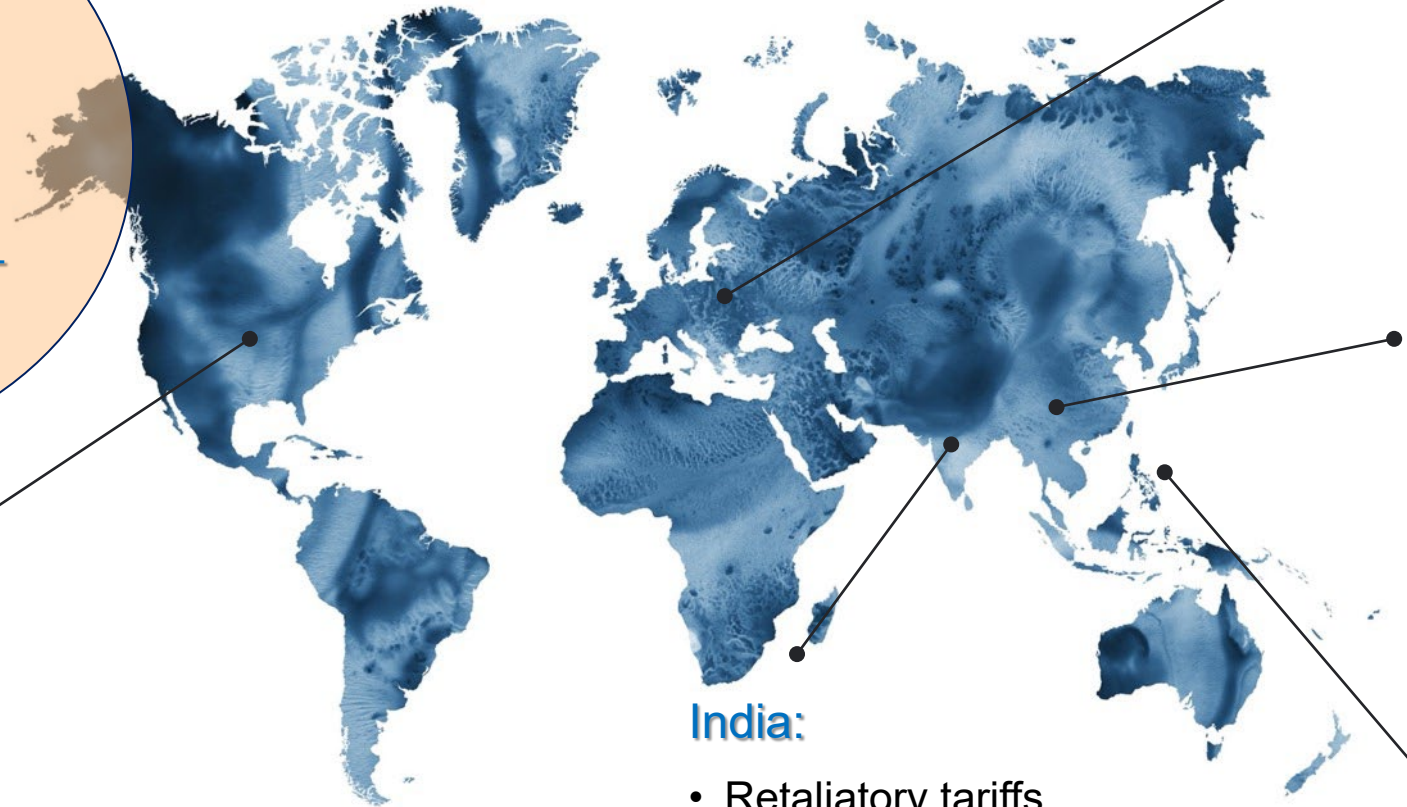
- Retaliatory tariffs
- Decree 248
- Yeast/mold, afla limits
- Almond hulls access

India:

- Retaliatory tariffs
- Labeling, grades stds
- No Objection Certificate
- Australia FTA

Japan:

- Pesticide MRLs
- Aflatoxin inspection



The 2023 Trade Picture... Panel Discussion

1

Sara Garcia Figuera
Prospero & Partners

2

Clay Hamilton
USDA/Foreign Ag Service

3

Keith Schneller
Almond Board of California

4

Jonathan Hoff
Monte Vista Farming

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Political environment for almond exports to the European Union

Sara García-Figuera, Ph.D. (Prospero & Partners)

12/07/2022

What we are doing for ABC

Prospero has been working with ABC since July 2021 providing timely intelligence about European regulatory and policy developments that could affect its members

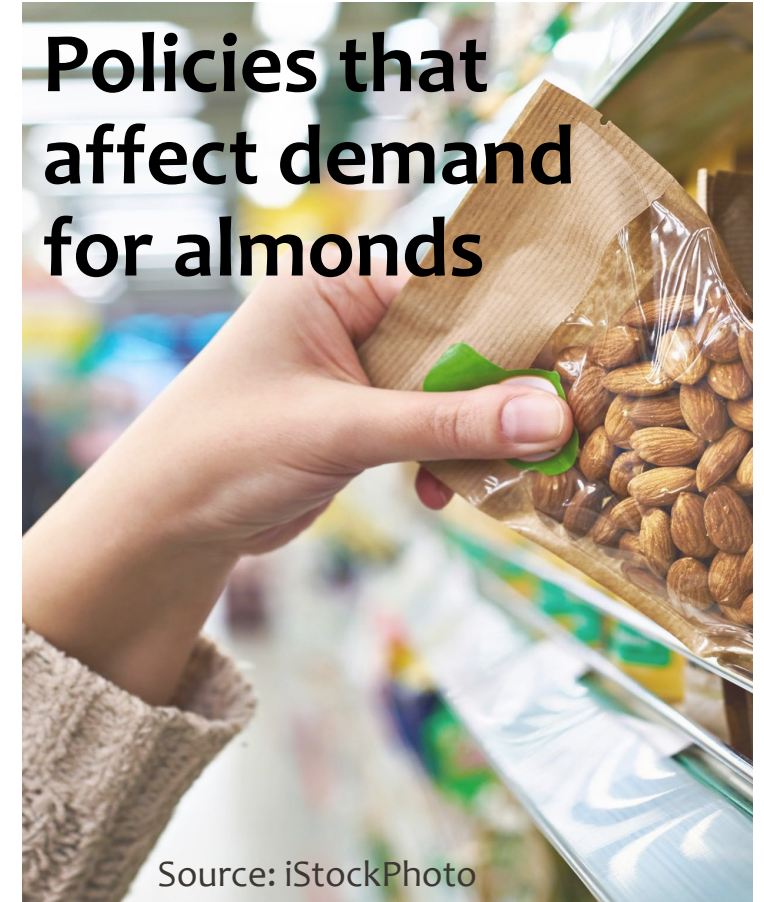
Policies that affect almond imports



Policies that affect competitiveness



Policies that affect demand for almonds



The EU Green Deal

Overarching roadmap for all EU policies in the mid-term (2019-2024) that aims to ensure:

- no net emissions of greenhouse gases by 2050
- economic growth decoupled from resource use
- no person and no place left behind

The EU Green Deal covers many policy areas



Farm to Fork (F2F) strategy: overall goals



- To ensure **food security** in the face of climate change and biodiversity loss
- To reduce the **environmental and climate footprint** of the EU food system
- To strengthen the EU food system's **resilience**
- To lead a **global transition** towards competitive sustainability from farm to fork

Source: EU Commission, https://ec.europa.eu/food/horizontal-topics/farm-fork-strategy_en

F2F strategy: quantitative targets

2030 Targets for sustainable food production

PESTICIDES



Reduce the overall use and risk of chemical and hazardous pesticides

NUTRIENT LOSSES



Reduce nutrient losses by 50% whilst retaining soil fertility, resulting in 20% less fertilisers

ANTIMICROBIALS



Reduce sales of antimicrobials for farmed animals and aquaculture

ORGANIC FARMING

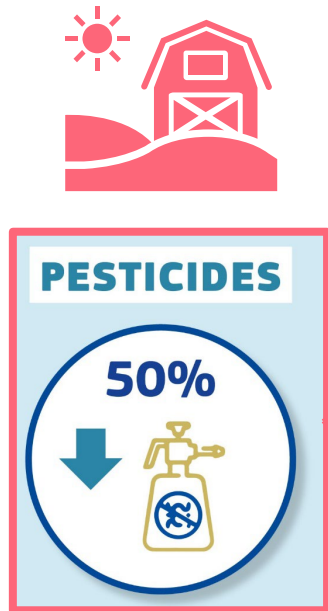


Increase the percentage of organically farmed land in the EU

CONTROVERSIAL

Source: EU Commission, https://twitter.com/EU_Commission/status/1263054310499405824/photo/1

F2F strategy: Reduction in the use and risk of pesticides



New Sustainable Use of Pesticides Regulation

- Harmonised implementation across countries and digital records
- National legally-binding reduction targets and action plans
- Enhance provisions on Integrated Pest Management

EU Pollinators initiative

- Monitoring framework for pollinators in the EU

Common agricultural policy (CAP)

- Funding to promote agricultural practices that reduce the use of pesticides
- Funding to promote access to technical support and advice

Global ambitions

- Lowering MRLs (thiamethoxam and clothianidin) for environmental reasons

F2F strategy: Sustainability labelling for food



- Provide information to consumers on nutritional, climate, environmental and social aspects of food products
- Harmonise different approaches at EU, national and sectoral levels
- Complemented by other initiatives on better protection against unfair practices, ‘green claims’ and front-of-pack nutrition labelling
- Expected by **end 2023**



Source: ITAB, <http://itab.asso.fr/activites/planet-score.php>



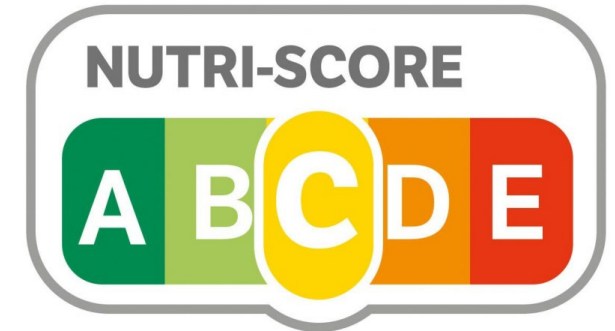
Source: <https://docs.score-environnemental.com/v/en/>

Source: EU Commission, https://ec.europa.eu/food/safety/labelling-and-nutrition/food-information-consumers-legislation_en

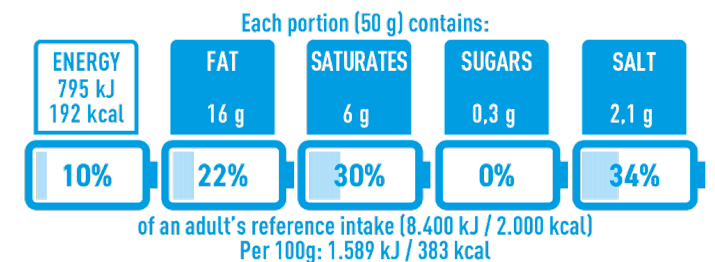
F2F strategy: Harmonised front-of-pack nutrition labelling



- EFSA scientific opinion published on April 19th, 2022 → Consumption of nuts and seeds is encouraged
- EU member states support different schemes
- The European Commission just postponed the proposal for spring 2023



Nutrinform battery



Longer-term impacts on almond imports into the EU

- Farm to Fork Strategy targets being challenged under current geopolitical context
- Mirror clauses in trade agreements still unclear
- Potential changes in import tolerances for pesticides
- Greater accountability on production practices
- New labelling requirements: sustainability, carbon farming, mandatory front-of-pack nutrition labelling
- Shift to more plant-based diets
- Increased demand for imports of fruits, vegetables and nuts



Sara García Figuera

Consultant

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cultivate change, harvest value



US Efforts in the Evolving Global Environment

Clay Hamilton

USDA/FAS Associate Administrator

12/07/2022

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A graphic celebrating the 50th anniversary of The Almond Conference. It features a large, gold-colored '50' in the center, with 'THE ALMOND CONFERENCE' above and 'YEARS' below, all in gold text. The background is a dark, textured surface with scattered almonds and a bowl of almonds in the upper right corner.

THANK YOU

