



the Almond
CONFERENCE
2019

State of the Industry

RICHARD WAYCOTT, *CEO,*
Almond Board of California

HOLLY KING, *Chair, Board of Directors,*
Almond Board of California



AGENDA

- + New vision and the Almond Orchard 2025 Goals
- + Looking back over the past year
 - The challenges we faced
 - The foundational building blocks in place
- + Deployment of Assessment Increase
- + 2019 deliverables and accomplishments
- + 2020-2040 Vision and Strategic Planning
- + Almond Achievement Award

VISION:

California Almonds
make life better by
what we grow and
how we grow.



Oval Office – May 2019



VISION:

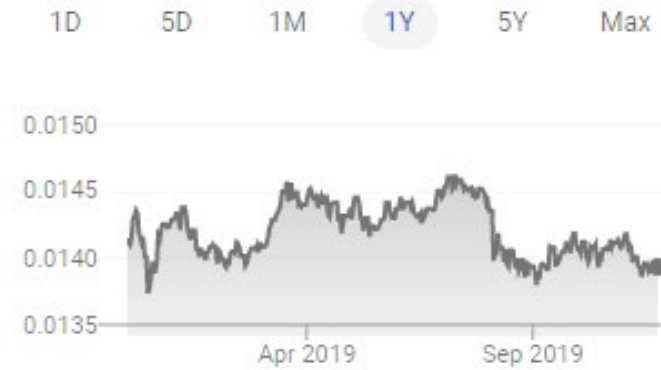
California Almonds
make life better by
what we grow and
how we grow.



TRADE ISSUES ABOUND, BUT...



INDIA



CHINA



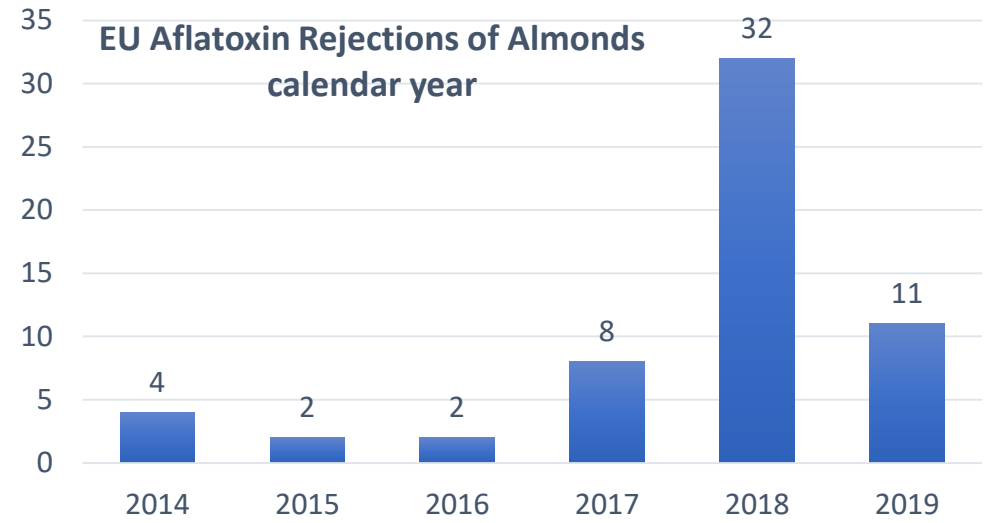
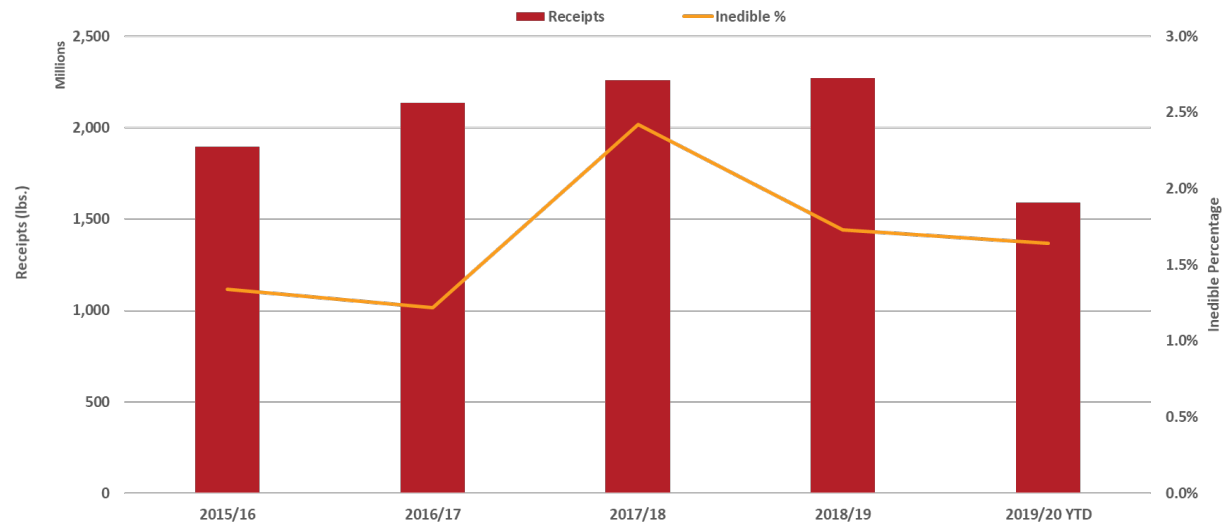
FOREIGN EXCHANGE DEVALUATIONS

EURO

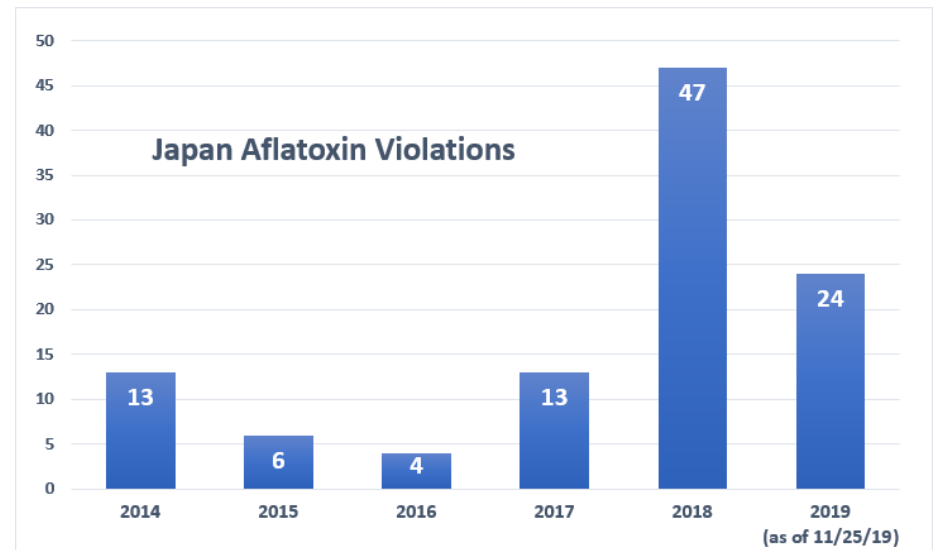
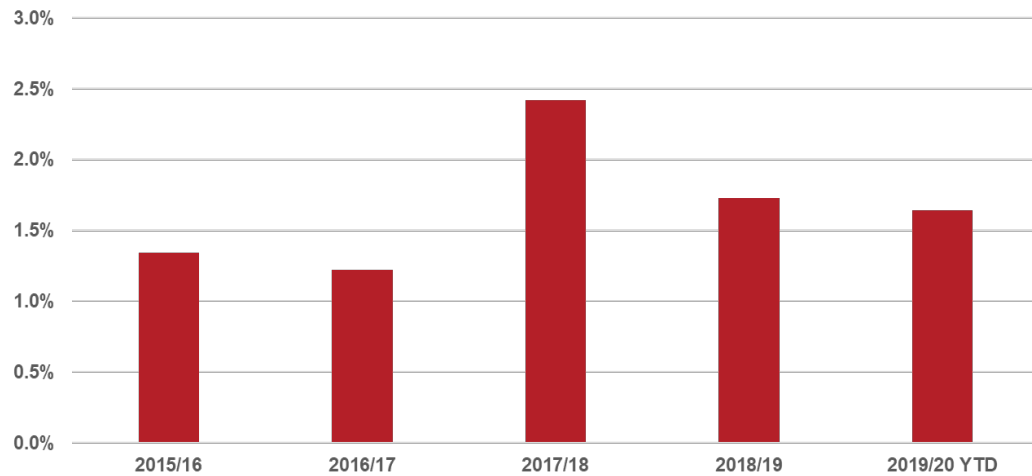


TURKEY





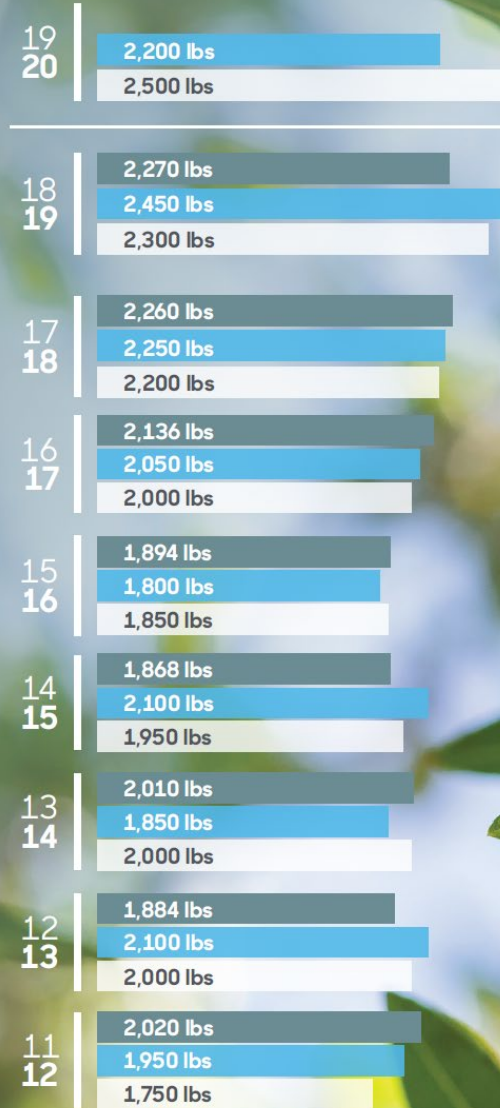
AFLATOXIN REJECTS



SUBJECTIVE AND OBJECTIVE ESTIMATES

crop years 2010/11-2019/20 | million pounds

California Almond Forecasts vs. Actual Production





BUILDING ON A STRONG FOUNDATION





CASP 9-MODULES

**Irrigation
Management**

Air Quality

**Financial
Management**

**Nutrient and Soil
Management**

Energy Efficiency

**Ecosystem
Management**

Pest Management

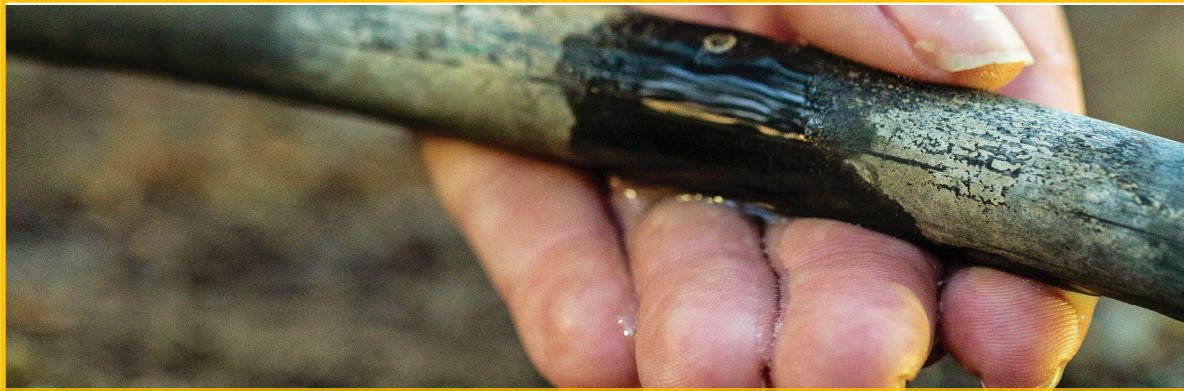
**Bee Health and
Pollination**

**Workplace and
Communities**

BENEFITS TO YOU AND ALL OF US



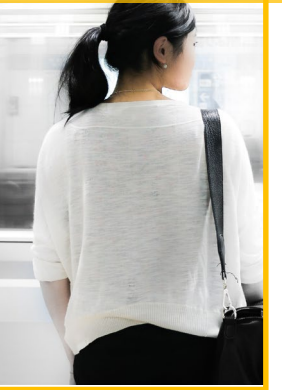
- + Comparative data; improve operations
- + Key Tools:
 - Nitrogen calculator
 - Mapping tools to meet regulatory reporting requirements for ILRP
 - Irrigation calculator
- + Protect our right-to-farm
- + Take advantage of marketable statistics to attract buyers
 - Handler – differentiate product
 - Supply chain – differentiate industry
- + Collective information- correctly position and defend



DEPLOYMENT OF ASSESSMENT FUNDS

+ More Demand

+ Better Supply



A PENNY MAKES A BIG IMPACT



REMOVING IT DOES AS WELL

Marketing programs

2019: -24% ↓

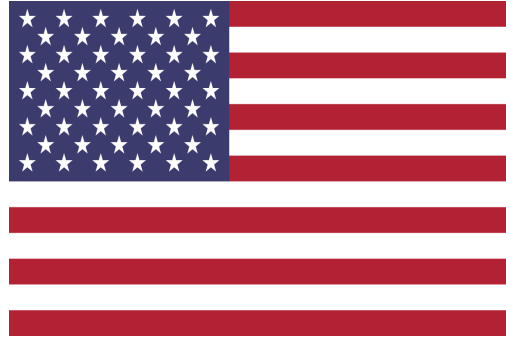
2020: -17% ↓
(based on 2.35B lbs)

INCREASING CURRENT MARKETS

+\$14.4 Million



+\$10.8 Million



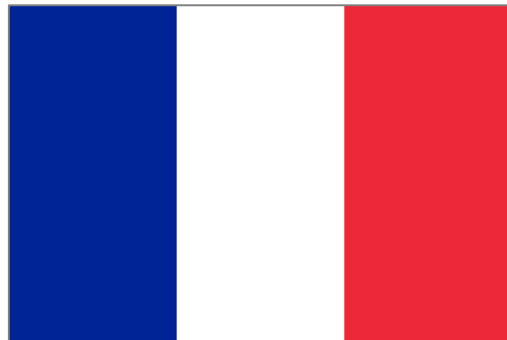
+\$4.6 Million



+\$2.5 Million



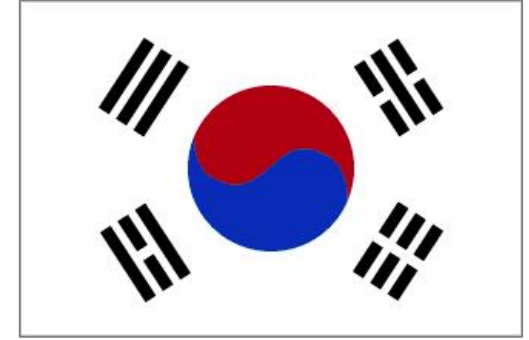
+\$2.3 Million



+\$1.4 Million

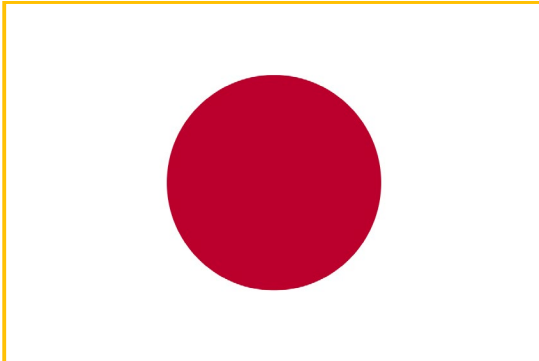


+\$1 Million



EXPANSION INTO NEW MARKETS

+\$2.4 Million



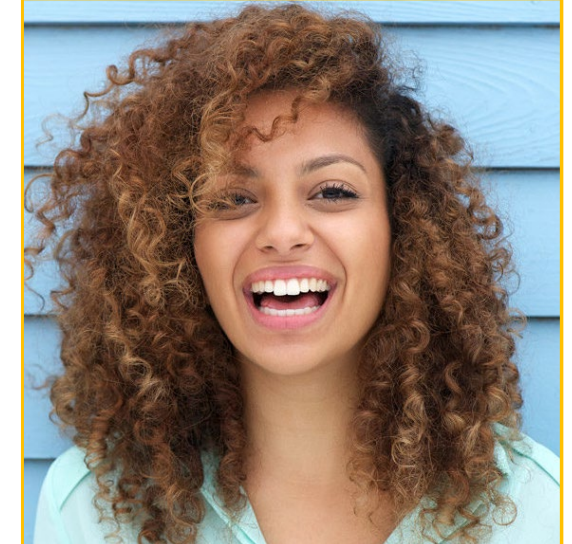
+\$6.1 Million



+\$3.6 Million



+\$600,000



ALMOND ORCHARD OF THE FUTURE

BIOMASS

HARVESTING

IRRIGATION

NUTRIENTS

SOIL HEALTH

**ORCHARD
MANAGEMENT**

VARIETIES

NEW ROOTSTOCKS

PEST MANAGEMENT

POLLINATION

SUSTINABILITY



water efficiency

FURTHER REDUCING THE WATER USED TO GROW ALMONDS



air quality

IMPROVING LOCAL AIR QUALITY DURING ALMOND HARVEST



pest management

INCREASING ADOPTION OF ENVIRONMENTALLY FRIENDLY PEST MANAGEMENT TOOLS



zero waste

ACHIEVING OPTIMAL USE OF EVERYTHING WE GROW



Almond Leadership PROGRAM



**ALMOND
BOARD OF
CALIFORNIA**

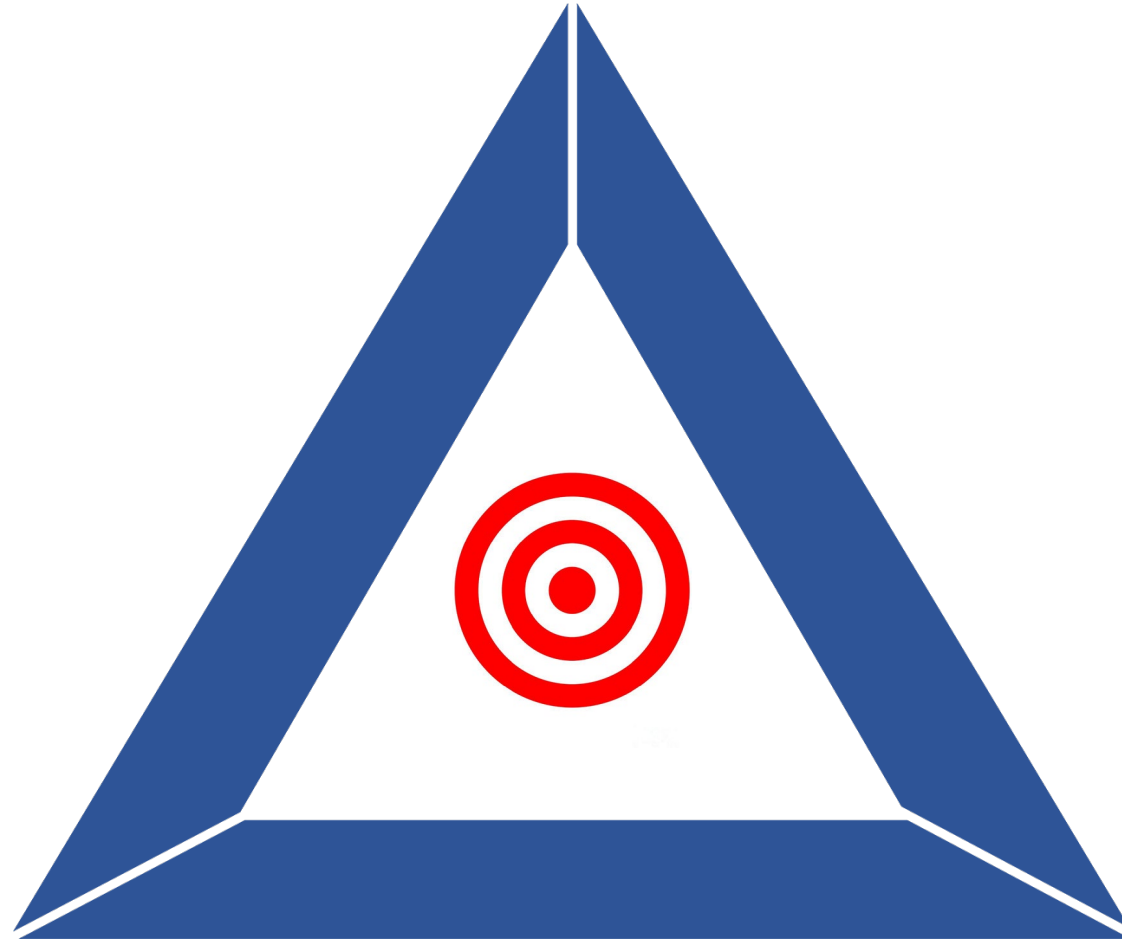
70 YEARS



DELIVERABLES

“TRINITY”

**INDUSTRY
MEMBERS**



GLOBAL DIVERSIFICATION

NORTH AMERICA

- Canada
- U.S.
- Mexico

EUROPE

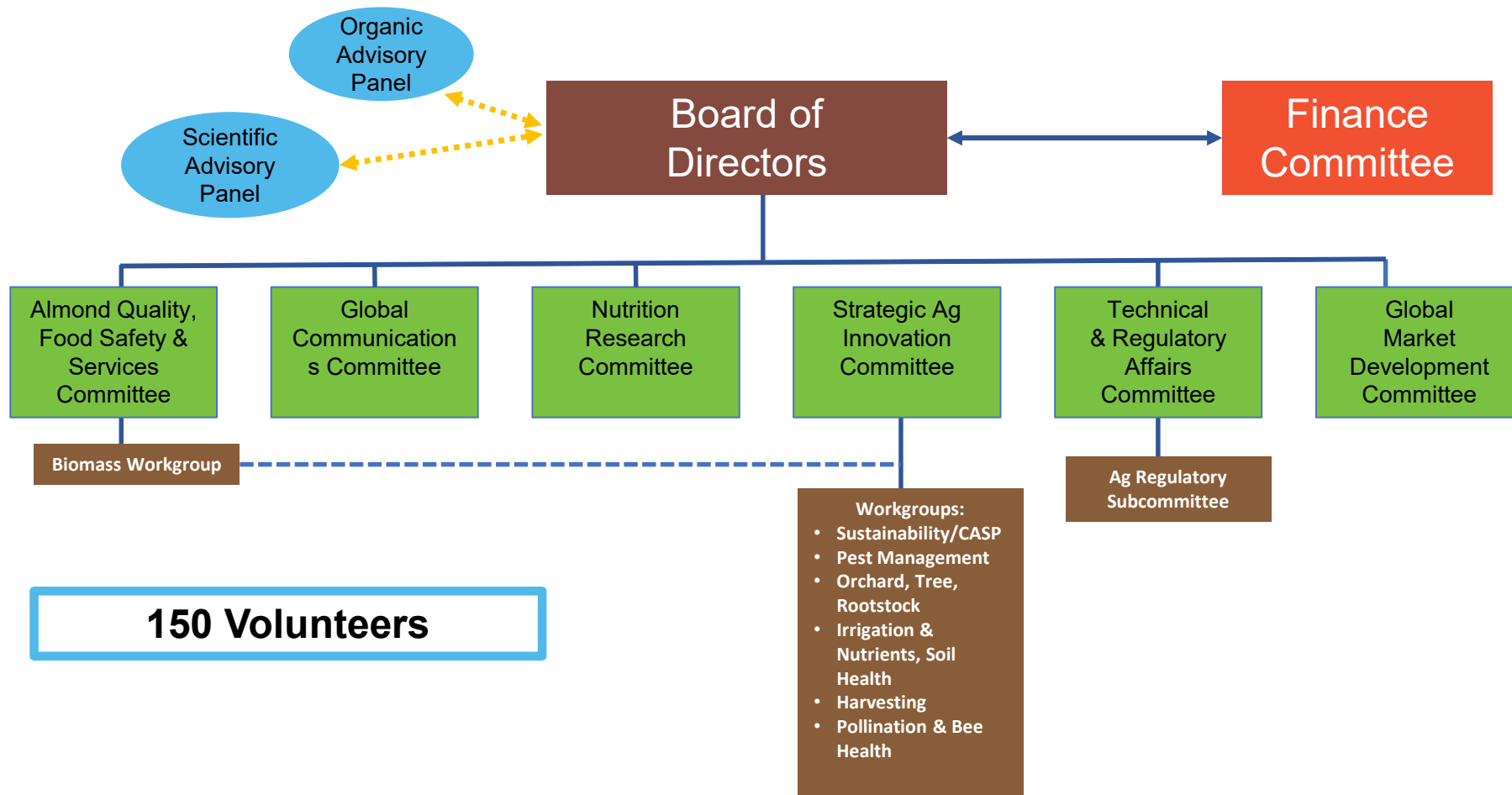
- UK
- France
- Germany
- Italy

ASIA

- China
- India
- S. Korea
- Japan



SAIC AND WORKGROUPS





California
almonds
Almond Board of California

WE WANT YOU!

WALK THE TALK



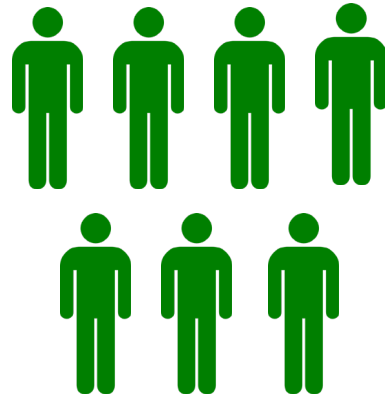
BOARD OF
DIRECTORS
COMMITMENT

9-MODULE
CLUB

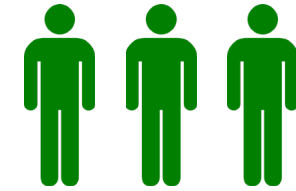
SUPPLY
CHAIN
PROGRAM

WALK THE TALK

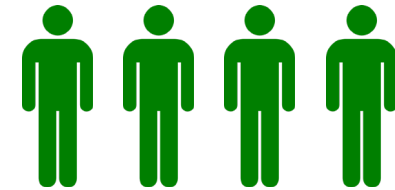
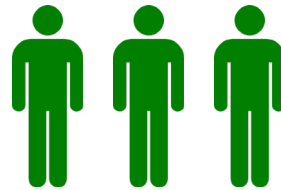
GROWERS:
9-MODULE CLUB



HANDLERS:
SUPPLY CHAIN



IN PROGRESS:



**WALK
THE
TALK**



**LET'S
LEAD
TOGETHER**

THREE PHASES OF PLANNING:

**THE
HERE**

**THE
NEAR**

**THE
FAR**



THREE PHASES OF PLANNING:

**THE
HERE**

SURVIVAL

**THE
NEAR**

NEW + RENEW

**THE
FAR**

DISRUPTION

INNOVATION CONTINUUM

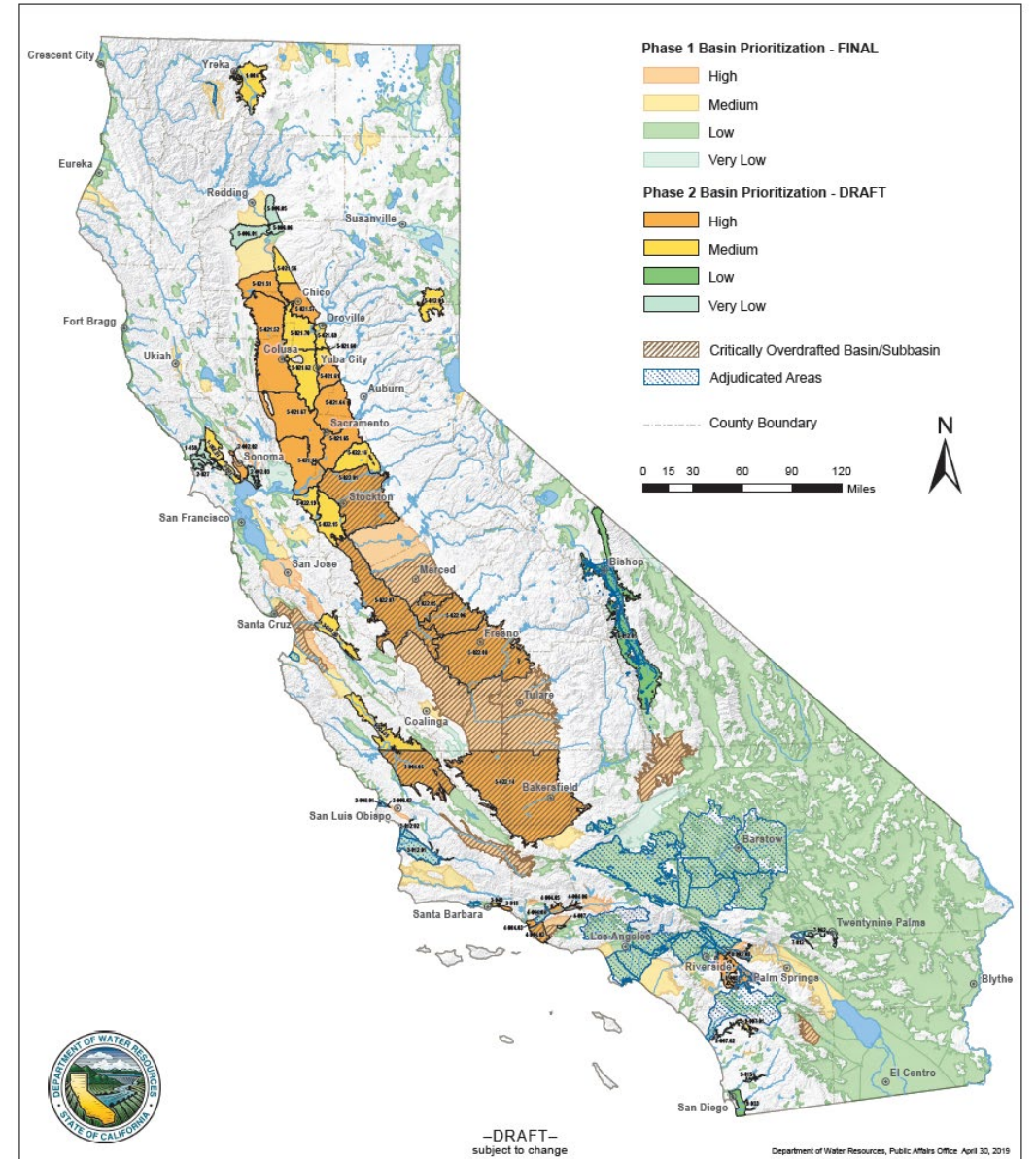


INDUSTRY DEMOGRAPHICS AND PSYCHOGRAPHICS



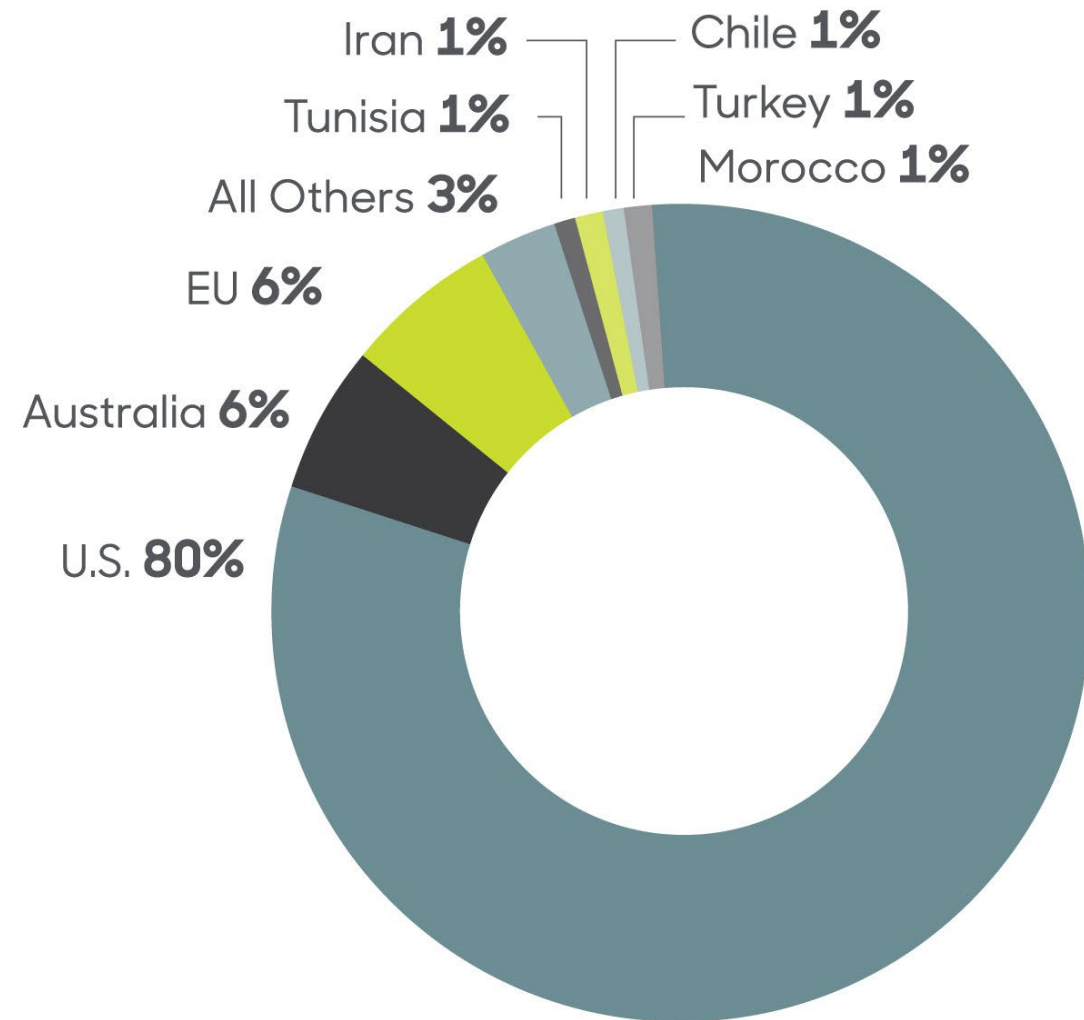
POLLINATION AND VARIETIES

SUSTAINABLE GROUNDWATER MANAGEMENT ACT (SGMA)

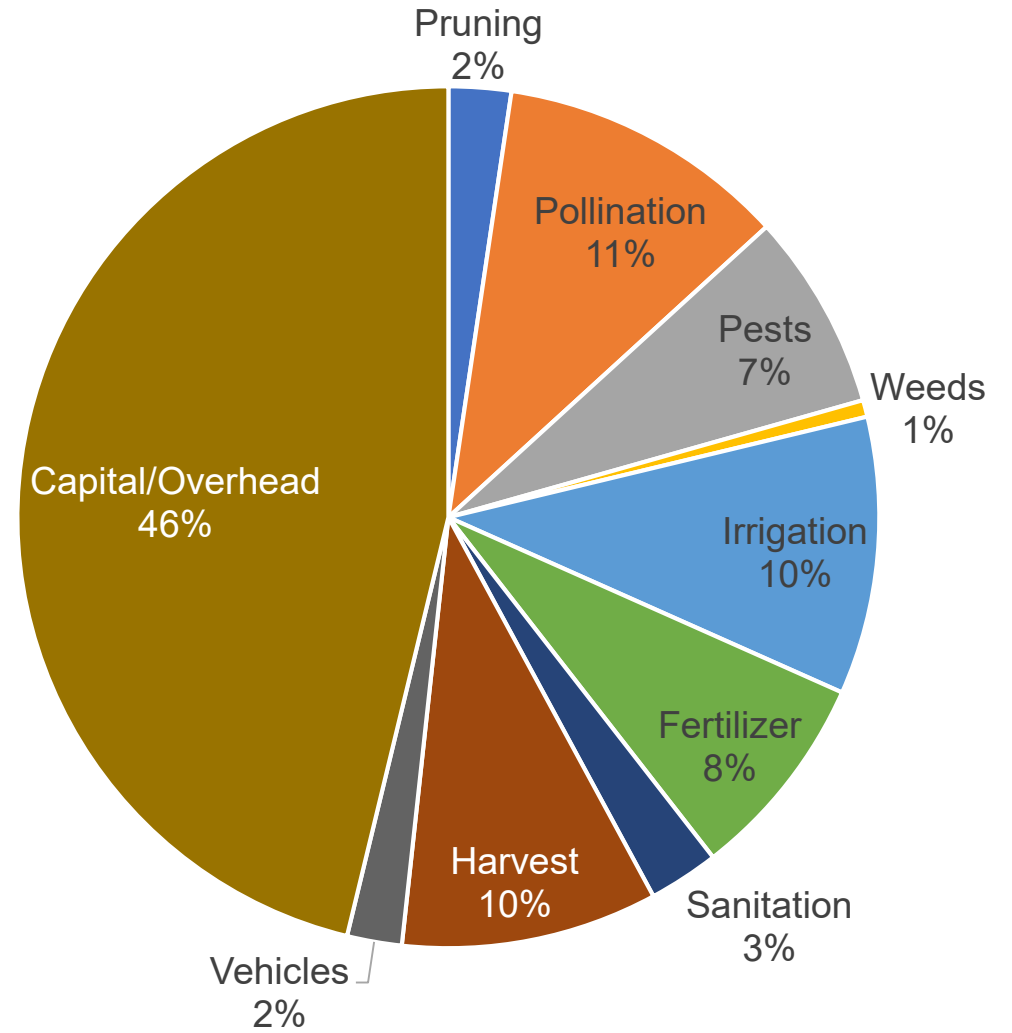
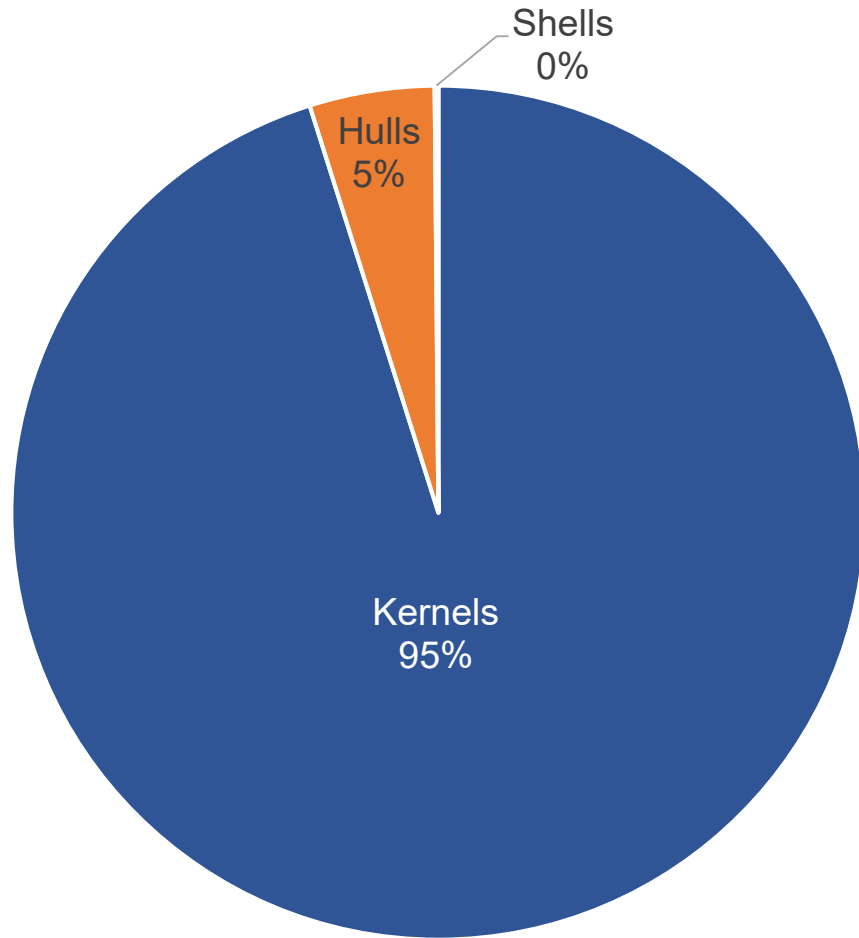


WORLD ALMOND PRODUCTION

Crop year 2018/2019



INDUSTRY PROFITABILITY



- + VISION
- + COLLABORATION
- + CHALLENGES
- + GOALS
- + SUSTAINABILITY
- + RESOURCES
- + DELIVERABLES
- + STRATEGIC PLANNING
- + PROFITABILITY
- + FUTURE GENERATIONS





“My dream for my future is to someday raise a family on the land that I was raised on, the land that my dad was raised on, and that my grandpa was raised on. That’s my dream.”

“We get to work together and produce a crop that’s good for the world.”





BOARD RETREAT

*Vision ~ Strategy ~ Commitment
Accomplishment ~ Success ~ Resources*



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CONFERENCE
2019

ALMOND ACHIEVEMENT AWARD

 **california
almonds**[®]
Almond Board of California

Congratulations!

Rob Kiss

Bayer





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2019

State of the Industry