WHAT DO YOU SEE WHEN YOU GET TO THE TOP OF MT. KOSCIUSZKO?
WHEN YOU GET TO THE TOP OF MT. WHITNEY, ELEVATIONS TEND TO RISE MUCH FASTER.
MORE PEAKS!

14,505 FEET
BIG FOOD UNDER FIRE

New demands for...
trust and transparency
food safety
food quality
GRASPING FOR THE FUTURE

PEPSICO

HERSHEY
THE HERSHEY COMPANY

FERRERO ROCHER

Nestlé

Campbells
CHICKEN NOODLE SOUP

VEGEMITE
YEAST EXTRACT
PRODUCT OF AUSTRALIA
ELEVATED DEFINITION OF HEALTH
TRADE DISPUTES CHALLENGE WORLD ORDER
LEADING FOR THE FUTURE

Mt. Whitney
14,505 Feet
CALIFORNIA ALMOND ACREAGE

Source: USDA Agricultural Statistics Service, Pacific Region (NASS/PR) 2018 Acreage Report
+30%
+ 700 MILLION POUNDS (320,000 MT)
INCREASE IN CALIFORNIAN SUPPLY
CY 17/18 – CY 21/22
1. Creating demand ahead of increased supply
2. Accelerated Ag Innovation
3. Transforming the consumer landscape
ADDITIONAL GROWER FUNDING
$67 MILLION USD
CY 16/17 – CY 18/19
EXPANSION INTO NEW MARKETS

South America
INCREASING CURRENT MARKETS

Germany

United States

China
INNOVATING THE ALMOND ORCHARD OF THE FUTURE
NUTRITION RESEARCH FOCUS

<table>
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<tr>
<th>Research Area</th>
<th># Projects</th>
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<td>Heart Health &amp; Beyond</td>
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<td><strong>Total</strong></td>
<td><strong>105</strong></td>
<td><strong>161</strong></td>
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</tbody>
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Last Edited: 8/16/18
Does inclusion of almonds in an energy restricted diet enhance weight loss and protect against weight regain?

Principal Investigator: Alison Coates/UNISA, Australia
BODY COMPOSITION AND SATIETY

The effect of almonds on body weight and satiety

Principal Investigator:
R. Brown/Univ. of Otago, New Zealand
The Playing Field is Changing: Nutrition and Sustainability
RESPONSIBLE MARKETING MANAGEMENT OF SUPPLY 2018-2030

PRODUCTION (METRIC TONS)

Total Production: 2.16M Metric Tons: +85% vs. 2017
INVESTING FOR THE LONG TERM

GROWER INVESTMENT

+ USDA

FOREIGN AGRICULTURAL SERVICE
OPPORTUNITY TO WORK TOGETHER