



Almond Board of California

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Almond Industry Position Report

November 2008

2008-2009 Crop Year

Salable	Forecast Million Lbs.	2008-2009	2007-2008	% Change
		8/1 - 11/30 Kernel Wt.	8/1 - 11/30 Kernel Wt.	
1. Carryin August 1, 2008	231.2	231,151,418	133,949,675 *	72.57%
2. Crop Receipts to Date	1,500.0	1,320,937,226	1,231,576,953	7.26%
3. [3% Loss and Exempt]	<u>45.0</u>	(<u>39,628,117</u>)	(<u>36,947,309</u>)	
4. New Crop Marketable (2-3)	1,455.0	1,281,309,109	1,194,629,644	7.26%
5. [Reserve]	n/a	<u>0</u>	<u>0</u>	
6. Total Supply (1+4-5)	<u>1,686.2</u>	<u>1,512,460,527</u>	<u>1,328,579,319</u>	13.84%

Shipments by Handlers

7. Domestic	425.0	144,181,982	151,909,446	-5.09%
8. Export	<u>935.0</u>	<u>365,518,655</u>	<u>354,247,101</u>	3.18%
9. Total Shipments	1,360.0	<u>509,700,637</u>	<u>506,156,547</u>	0.70%
10. Forecasted Carryout	<u>326.2</u>			
11. Computed Inventory (6-9)		<u>1,002,759,890</u>	<u>822,422,772</u>	21.93%

Commitments (sold, not delivered)**

12. Domestic		187,356,232	167,554,104	11.82%
13. Export		<u>179,005,407</u>	<u>178,106,927</u>	0.50%
14. Total Committed Shipments		<u>366,361,639</u>	<u>345,661,031</u>	
15. Uncommitted Inventory (11-14)		<u>636,398,251</u>	<u>476,761,741</u>	33.48%

**75% of handlers reported commitments, representing 80% of the 2007/2008 crop

		MONTHLY REPORT OF SALABLE HANDLER SHIPMENTS			
		2008-2009 Crop Year		2007-2008 Crop Year	
		11/1 - 11/30	8/1 - 11/30	11/1 - 11/30	8/1 - 11/30
<u>DOMESTIC</u>	Shelled	24,732,013	107,868,538	35,474,379	113,771,957
	Manufactured	10,673,421	50,196,660	12,013,983	49,088,273
	Products	69,879	420,917	182,636	637,956
	Inshell	721,359	12,044,654	285,037	3,942,877
	(Interhandler Transfers)	(3,505,000)	(20,713,015)	(5,291,276)	(11,122,417)
	(Industry Purchases)	(<u>1,639,122</u>)	(<u>5,635,772</u>)	(<u>860,694</u>)	(<u>4,409,200</u>)
	TOTAL:	<u>31,052,550</u>	<u>144,181,982</u>	28%	<u>41,804,065</u>
<u>EXPORT</u>	Shelled	63,127,582	254,062,650	66,621,283	254,760,490
	Manufactured	7,507,852	38,178,796	9,647,749	42,458,458
	Products	383	30,680	1,001	12,331
	Inshell	<u>16,551,512</u>	<u>73,246,529</u>	<u>11,450,773</u>	<u>57,015,822</u>
	TOTAL:	<u>87,187,329</u>	<u>365,518,655</u>	72%	<u>87,720,806</u>
<u>NET SHIPMENTS</u>	<u>118,239,879</u>	<u>509,700,637</u>	100%	<u>129,524,871</u>	<u>506,156,547</u> 100%
<u>EXEMPT/INEDIBLE SHIPMENTS</u>	<u>707,532</u>	<u>4,832,157</u>		<u>468,265</u>	<u>7,549,210</u>

EXPORT DELIVERIES BY DESTINATION
(Kernel Weight)

	+/-	Crop Year 2008-2009				Crop Year 2007-2008			
		8/01/08 through 11/30/08				8/01/07 through 11/30/07			
		Country	Shelled	Inshell	%	Country	Shelled	Inshell	%
North America 4.72%	-18%	Canada	14,620,110	159,967	4.04%	Canada	16,724,894	319,913	4.81%
		Mexico	2,465,100	0	0.67%	Mexico	4,063,491	0	1.15%
		Total	17,085,210	159,967		Total	20,788,385	319,913	
Central America 0.03%	n/a	Costa Rica	***	0	0.00%	Costa Rica	***	0	0.00%
		Guatemala	***	0	0.00%	Guatemala	0	0	0.00%
		Others	106,625	0	0.03%	Others	116,575	13,500	0.03%
Total	106,625	0		Total	116,575	13,500			
Caribbean 0.04%	n/a	Trinidad	***	0	0.00%	Trinidad	***	0	0.00%
		Others	149,350	3,275	0.04%	Others	142,900	***	0.04%
		Total	149,350	3,275		Total	142,900	0	
South America 0.42%	-34%	Argentina	0	***		Argentina	195,000	40,286	0.07%
		Brazil	56,377	91,544		Brazil	134,162	98,787	0.07%
		Chile	964,000	0	0.26%	Chile	1,588,200	0	0.45%
		Venezuela	383,750	0		Venezuela	213,000	0	0.06%
		Others	47,260	0	0.01%	Others	73,766	***	0.02%
		Total	1,451,387	91,544		Total	2,204,128	139,073	
Western Europe 44.52%	-14%	Austria	186,000	0	0.05%	Austria	352,000	0	0.10%
		Belgium	5,367,190	0	1.47%	Belgium	8,727,039	0	2.46%
		Denmark	2,182,419	0	0.60%	Denmark	3,905,630	0	1.10%
		Finland	410,759	0	0.11%	Finland	351,725	0	0.10%
		France	8,794,700	0	2.41%	France	14,023,725	0	3.96%
		Germany	39,864,711	16,034	10.91%	Germany	44,532,891	0	12.57%
		Greece	8,039,117	137,739	2.24%	Greece	10,760,326	93,186	3.06%
		Italy	13,184,874	685,898	3.79%	Italy	16,907,401	857,277	5.01%
		Netherlands	10,906,492	0	2.98%	Netherlands	11,215,169	0	3.17%
		Norway	2,302,308	0	0.63%	Norway	2,162,495	0	0.61%
		Portugal	766,000	0	0.21%	Portugal	616,750	0	0.17%
		Spain	52,957,242	255,359	14.56%	Spain	59,273,772	27,974	16.74%
		Sweden	3,085,287	0	0.84%	Sweden	2,347,200	0	0.66%
		Switzerland	1,663,261	0	0.46%	Switzerland	1,820,430	0	0.51%
		United Kingdom	11,772,160	0	3.22%	United Kingdom	10,218,330	0	2.88%
		Others	139,400	0	0.04%	Others	0	0	0.00%
		Total	161,621,920	1,095,030		Total	187,214,883	978,437	
Eastern Europe 3.67%	17%	Bulgaria	462,800	0	0.13%	Bulgaria	***	0	0.00%
		Croatia	554,000	0	0.15%	Croatia	392,400	0	0.11%
		Czech Republic	1,823,700	0	0.50%	Czech Republic	1,293,323	0	0.37%
		Estonia	***	0	0.00%	Estonia	173,000	0	0.05%
		Hungary	175,000	0	0.05%	Hungary	***	0	0.00%
		Latvia	1,523,750	0	0.42%	Latvia	2,143,400	15,290	0.61%
		Lithuania	570,700	0	0.16%	Lithuania	601,000	0	0.17%
		Poland	657,750	0	0.18%	Poland	768,050	0	0.22%
		Romania	220,000	0	0.06%	Romania	110,000	0	0.03%
		Russia	6,304,050	0	1.72%	Russia	5,253,150	0	1.48%
		Serbia	337,500	0	0.09%	Serbia	0	0	0.00%
		Ukraine	669,500	0	0.18%	Ukraine	362,825	0	0.10%
		Others	125,000	0	0.03%	Others	397,550	1,765	0.11%
		Total	13,423,750	0		Total	11,494,698	17,055	
Middle East 11.16%	17%	Bahrain	198,925	10,800	0.06%	Bahrain	***	0	0.00%
		Cyprus	567,550	15,842	0.16%	Cyprus	918,500	52,000	0.27%
		Israel	2,645,253	266,657	0.80%	Israel	2,318,575	142,663	0.69%
		Jordan	2,009,000	192,278	0.60%	Jordan	2,811,725	565,233	0.95%
		Kuwait	602,500	15,935	0.17%	Kuwait	423,834	39,129	0.13%
		Lebanon	2,421,250	0	0.66%	Lebanon	1,386,475	0	0.39%
		Saudi Arabia	1,279,400	0	0.35%	Saudi Arabia	1,166,250	121,869	0.36%
		Turkey	2,226,338	8,034,726	2.81%	Turkey	619,000	3,128,394	1.06%
		United Arab Emirates	17,509,792	2,664,683	5.52%	United Arab Emirates	18,613,125	2,046,096	5.83%
		Others	145,500	0	0.04%	Others	469,475	0	0.13%
		Total	29,605,508	11,200,921		Total	28,726,959	6,095,384	
Asia 33.23%	33%	China	30,586,136	15,866,205	12.71%	China	12,879,628	5,653,860	5.23%
		India	3,391,488	44,091,742	12.99%	India	2,317,998	43,212,671	12.85%
		Indonesia	401,750	0	0.11%	Indonesia	336,375	0	0.09%
		Japan	15,484,405	0	4.24%	Japan	14,521,571	0	4.10%
		Malaysia	809,050	0	0.22%	Malaysia	842,025	0	0.24%
		Pakistan	1,126,950	104,807	0.34%	Pakistan	736,500	49,613	0.22%
		Philippines	51,500	0	0.01%	Philippines	28,425	0	0.01%
		Singapore	581,025	0	0.16%	Singapore	1,341,880	0	0.38%
		South Korea	5,141,555	0	1.41%	South Korea	4,933,805	0	1.39%
		Taiwan	2,256,588	319,441	0.70%	Taiwan	2,591,532	161,573	0.78%
		Thailand	818,250	0	0.22%	Thailand	872,275	0	0.25%
		Vietnam	285,000	127,837	0.11%	Vietnam	595,828	374,743	0.27%
Others	0	0	0.00%	Others	36,000	0	0.01%		
Total	60,933,697	60,510,032		Total	42,033,842	49,452,460			
New Zealand 0.11%	-31%	New Zealand	398,825	0	0.11%	New Zealand	582,100	0	0.16%
Australia 0.30%	44%	Australia	1,111,700	0	0.30%	Australia	774,575	0	0.22%
Africa 1.80%	108%	Algeria	2,071,050	0	0.57%	Algeria	444,200	0	0.13%
		Egypt	2,518,375	185,760	0.74%	Egypt	1,046,500	0	0.30%
		Libya	463,750	0		Libya	253,000	0	0.07%
		Morocco	439,000	0	0.12%	Morocco	360,000	0	0.10%
		South Africa	748,879	0	0.20%	South Africa	900,775	0	0.25%
		Others	143,100	0	0.04%	Others	147,759	0	0.04%
Total	6,384,154	185,760		Total	3,152,234	0			
Others 0.00%	n/a	Others	0	0	0.00%	Others	0	0	0.00%
100.00%		TOTAL DELIVERIES	292,272,126	73,246,529	100.00%	TOTAL DELIVERIES	297,231,279	57,015,822	100.00%

***In Others (Named Countries Received Almonds From Three or More Handlers)



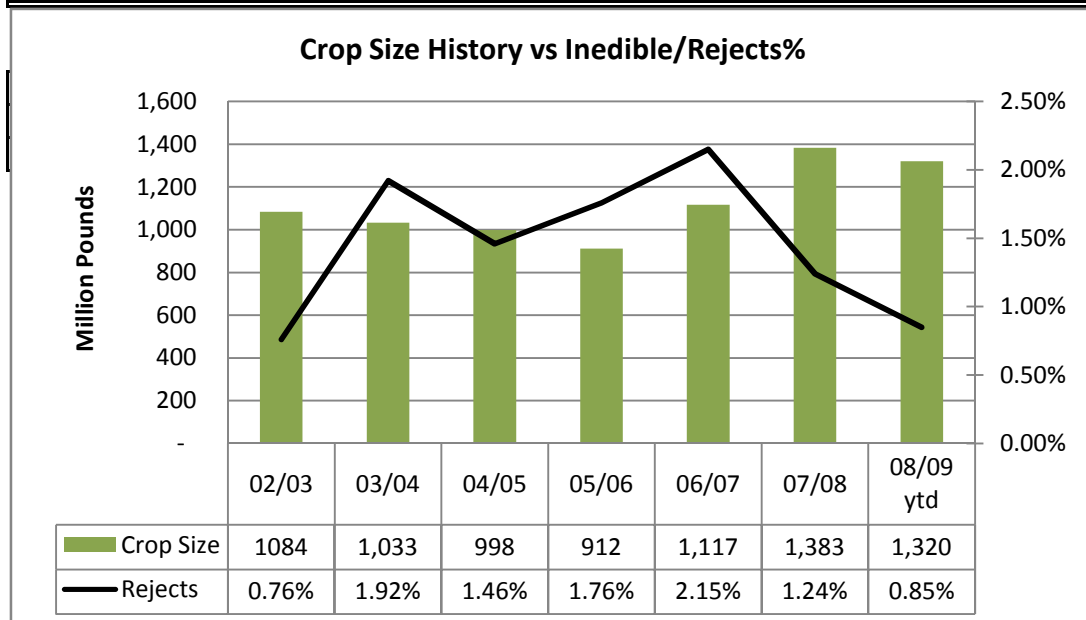
**Almond Board of California
Quality Control Receipts Report
Industry Summary
August 1, 2008 through November 30, 2008**

Variety Name	From ABC Form 1 Total Receipts	From USDA Inspection Certificates		% of Total Receipts	% Rejects
		Total Receipts	Total Inedibles		
Aldrich	31,760,300	29,937,044	227,233	2.40%	0.76%
Avalon	4,787,502	4,541,474	48,000	0.36%	1.06%
Butte	115,469,927	106,128,115	610,845	8.74%	0.58%
Butte/Padre	110,964,782	102,532,162	509,802	8.40%	0.50%
Carmel	168,244,299	154,840,852	927,465	12.74%	0.60%
Carrion	646,840	714,424	7,317	0.05%	1.02%
Fritz	68,597,962	62,704,444	516,963	5.19%	0.82%
Harvey	131,599	129,751	2,102	0.01%	1.62%
Hashem	303,970	117,840	1,114	0.02%	0.95%
Le Grand	87,093	87,093	1,065	0.01%	1.22%
Livingston	5,605,852	5,178,191	91,955	0.42%	1.78%
Marchini	287,042	289,859	1,216	0.02%	0.42%
Merced	123,602	120,979	1,882	0.01%	1.56%
Mission	22,831,707	20,042,459	80,532	1.73%	0.40%
Mixed	23,232,850	23,578,331	291,158	1.76%	1.23%
Mono	760,630	675,830	6,901	0.06%	1.02%
Monterey	123,108,757	112,728,866	938,602	9.32%	0.83%
Morley	802,601	888,835	6,221	0.06%	0.70%
N43	0	0	0	0.00%	0.00%
Neplus	2,296,083	2,223,602	33,076	0.17%	1.49%
Nonpareil	514,754,134	458,655,309	4,711,735	38.97%	1.03%
Padre	34,043,800	30,939,375	97,015	2.58%	0.31%
Peerless	7,904,919	7,400,190	34,564	0.60%	0.47%
Price	27,426,405	26,116,819	143,624	2.08%	0.55%
Ruby	4,816,368	3,561,748	21,339	0.36%	0.60%
Sauret	58,573	74,969	1,944	0.00%	2.59%
Savana	261,116	162,787	856	0.02%	0.53%
Sonora	25,909,282	23,253,844	399,836	1.96%	1.72%
Thompson	869,042	770,300	9,837	0.07%	1.28%
Tokyo	891,092	513,827	4,836	0.07%	0.94%
Winters	1,512,593	1,414,253	12,896	0.11%	0.91%
Wood Colony	21,303,757	20,469,398	116,368	1.61%	0.57%
Major Varieties Sub Total:	<u>1,319,794,479</u>	<u>1,200,792,970</u>	<u>9,858,299</u>	<u>99.91%</u>	<u>0.82%</u>
Minor Varieties Total:	<u>1,142,747</u>	<u>1,225,489</u>	<u>30,328</u>	<u>0.09%</u>	<u>2.47%</u>
Grand Total All Varieties	<u>1,320,937,226</u>	<u>1,202,018,459</u>	<u>9,888,627</u>	<u>100.00%</u>	<u>0.82%</u>

**This report is subject to further verification of handler's receipts
and further reconciliation of USDA incoming certificates**

Almonds Receipts History						
Percent Received by Handlers YTD by Month						
	03/04	04/05	05/06	06/07	07/08	AVG %
August 31	4.5%	15.0%	6.7%	3.9%	11.1%	8.2%
September 30	38.7%	48.5%	38.7%	36.4%	42.9%	41.0%
October 31	71.2%	75.4%	72.9%	64.6%	72.1%	71.3%
November 30	88.5%	91.3%	90.0%	84.2%	89.0%	88.6%
December 31	95.5%	97.2%	96.7%	94.5%	95.0%	95.8%
January 31	98.3%	99.0%	98.6%	97.8%	98.1%	98.4%
February 28	99.2%	99.8%	99.6%	98.6%	99.5%	99.3%
March 31	99.8%	100.0%	99.7%	99.2%	99.6%	99.6%
April 30	100.0%	100.0%	99.9%	99.3%	99.8%	99.8%
May 31	100.0%	100.0%	100.0%	99.7%	99.8%	99.9%
June 30	100.0%	100.0%	100.0%	99.7%	99.9%	99.9%
July 31 Lbs.(mil)	1,032.9	998.0	911.7	1,116.7	1,383.0	100.0%

Almond Shipment History						
Percent Shipped YTD by Month						
	03/04	04/05	05/06	06/07	07/08	AVG %
August 31	6.5%	8.0%	6.3%	5.5%	7.5%	6.8%
September 30	16.2%	19.6%	15.2%	15.9%	17.2%	16.8%
October 31	30.3%	32.8%	27.4%	30.0%	29.9%	30.1%
November 30	39.8%	43.3%	37.2%	40.4%	40.1%	40.2%
December 31	48.9%	52.4%	45.6%	49.3%	47.6%	48.8%
January 31	56.4%	60.3%	52.5%	57.2%	55.3%	56.4%
February 28	63.8%	67.3%	59.3%	64.1%	62.1%	63.3%
March 31	71.8%	75.0%	68.2%	70.7%	69.4%	71.0%
April 30	78.8%	80.9%	75.9%	77.4%	76.9%	78.0%
May 31	85.5%	87.7%	84.6%	84.6%	84.0%	85.3%
June 30	92.7%	94.4%	93.4%	92.3%	92.1%	93.0%
July 31 Lbs.(mil)	1,024.3	984.1	914.2	1,066.1	1,261.2	100.00%



Almond Board of California

Domestic	08/09 vs. 07/08	08/09	07/08	06/07	05/06	04/05	03/04	02/03	01/02
August	-4.5%	33.29	34.85	27.27	24.72	29.56	24.58	19.66	18.11
September	7.5%	36.54	33.98	32.59	26.94	31.31	26.89	26.57	19.80
October	4.9%	43.30	41.28	43.99	33.99	34.74	32.39	32.80	26.60
November	-25.7%	31.05	41.80	35.17	28.42	31.47	25.64	31.10	22.30
December			23.96	29.35	22.40	28.02	27.24	23.30	19.90
January			29.11	24.64	20.87	24.21	21.59	23.50	20.80
February			29.25	26.13	18.83	23.57	21.76	21.50	17.20
March			32.70	28.44	25.63	27.29	27.51	23.50	20.00
April			33.09	30.11	23.64	21.87	23.88	31.70	22.60
May			27.89	31.04	26.93	27.52	27.39	25.00	20.60
June			33.57	32.12	27.86	27.73	27.60	21.29	15.00
July			33.29	27.48	23.63	24.27	25.69	11.80	16.40
Total		144.2	394.8	368.3	303.9	331.55	312.16	291.72	239.31

Export	08/09 vs. 07/08	08/09	07/08	06/07	05/06	04/05	03/04	02/03	01/02
August	5.9%	63.39	59.85	31.45	32.72	49.12	42.03	34.30	42.40
September	14.4%	100.67	88.01	77.78	54.59	83.37	71.99	85.70	80.60
October	-3.7%	114.28	118.67	106.39	77.94	95.10	112.52	94.90	92.50
November	-0.6%	87.19	87.72	76.30	61.12	71.92	71.12	81.00	56.30
December			70.58	64.84	53.92	61.16	66.36	65.90	50.70
January			68.01	60.58	42.46	53.40	55.45	57.60	48.00
February			56.72	46.95	43.32	45.49	53.94	45.20	40.80
March			58.32	42.12	55.72	48.00	54.48	41.00	37.80
April			62.49	41.00	46.50	36.24	47.46	40.20	34.30
May			60.61	45.67	52.96	39.81	41.89	44.50	33.80
June			69.15	50.16	52.52	38.38	46.14	52.60	39.10
July			66.27	54.56	36.61	30.54	48.73	47.70	25.50
Total		365.5	866.4	697.8	610.4	652.5	712.1	690.6	581.8

Net	08/09 vs. 07/08	08/09	07/08	06/07	05/06	04/05	03/04	02/03	01/02
August	2.1%	96.68	94.70	58.71	57.44	78.68	66.62	54.00	60.50
September	12.5%	137.21	121.99	110.37	81.53	114.68	98.88	112.27	100.41
October	-1.5%	157.58	159.95	150.38	111.93	129.84	144.91	127.70	119.11
November	-8.7%	118.24	129.52	111.47	89.55	103.39	96.76	112.10	78.57
December			94.54	94.19	76.32	89.18	93.61	89.20	70.63
January			97.12	85.22	63.33	77.61	77.05	81.10	68.74
February			85.98	73.07	62.15	69.06	75.70	66.70	58.04
March			91.02	70.56	81.36	75.29	81.99	64.50	57.76
April			95.58	71.11	70.14	58.11	71.34	71.90	56.96
May			88.50	76.71	79.88	67.34	69.28	69.50	54.44
June			102.72	82.29	80.38	66.11	73.73	73.89	54.11
July			99.55	82.04	60.24	54.81	74.42	59.50	41.88
		509.7	1,261.2	1,066.1	914.2	984.1	1,024.3	982.4	821.1