



2020 ANNUAL REPORT

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AMERICAN PISTACHIO GROWERS

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OUR MISSION

“To collectively advance the American pistachio industry through research, promotion, advocacy & programs that directly benefit our members.”



The story of the American pistachio is one of unparalleled success. From the first harvest in 1978 of 1.5 million pounds to the largest harvest of over one billion pounds in 2020, American pistachios are number one in global production.

American Pistachio Growers was founded in 1989 by a few visionary pistachio cultivators who recognized the benefits of banding together to strengthen their influence in the industry. Today, APG is the collective voice of more than 800 members across the country, representing a \$1.5 billion industry and the only not-for-profit trade association for the American pistachio.

Our annual report provides a glimpse into the American pistachio grower and processing community and gives a comprehensive overview of the programs and support provided to pistachio growers in California, New Mexico and Arizona.

We're here to ensure the economic viability of American-grown pistachios across the globe by: investing in nutrition & health research, global promotion, grower education, production research, legislative advocacy and leadership development for the next generation.

APG STAFF

RICHARD MATOIAN, President

JUDY HIRIGOYEN, Vice President, Global Marketing

REBECCA HALL, Director, Marketing Communications

HAIYING ZHANG, Director, Asian Markets

CADEE CONDIT, Director, Government Relations

CASEY LAMONSKI, Director, Member Services & Communications

ALLIE JONES, Manager, Accounting

RENE YAMASHIRO, Manager, Nutrition Research & Communication

GENARO GONZALES, Manager, Digital Content

SUKHPAL "SUKEY" HAYER, Marketing Project Manager

DIANNA SHORT, Executive Assistant

JESSICA GARRISON, Assistant, Global Marketing

JENNIFER JONES, Administrative Assistant

A Message From The APG President



RICHARD MATOIAN
AMERICAN PISTACHIO
GROWERS PRESIDENT

Welcome to American Pistachio Growers 2020 Annual Report. While 2020 has been a year of unprecedented challenges on many levels, this report is a testament to how APG has rose to the occasion and successfully faced and navigated these challenges at every turn despite radically disrupted circumstances. We held fast to our purpose and goals and devised new and creative ways to achieve them.

We did this by focusing on the fact that while our circumstances and some of the ways of doing business may have changed in 2020,

our Mission as an organization had not. American Pistachio Growers has always been and will remain dedicated to collectively advancing the American pistachio industry through research, promotion, advocacy, and programs that directly benefit our members.

Some highlights from 2020 include –

APG ensured the smooth maintenance of business operations, marketing, nutrition research, government relations, and communications outreach activities even during periods of shut down.

APG promoted the health and safety of our staff and members while maintaining our capabilities and connections. Our staff demonstrated commendable creativity and flexibility and learned new ways of communicating with our members and consumers.

APG successfully worked to get our growers included in both the first and second Coronavirus Food Assistance Programs (CFAP 1.0 & 2.0). These programs provided substantial financial assistance to growers during a time of considerable economic down-turn.



“While 2020 has been a year of unprecedented challenges on many levels...

We held fast to our purpose and goals and devised new and creative ways to achieve them.”

APG worked to ensure that pistachios were included in the commodities that USDA purchased. This resulted in nearly 7.4 million pounds of in-shell product being purchased, representing \$32.2 million of value.

APG convened our Annual Conference in Monterey in March 2020, the largest gathering ever held in our organization’s history—1,100 plus participants—probably one of the last large in-person gatherings prior to the pandemic stay-at-home order going into place!

APG celebrated our industry’s momentous production milestone as we surpassed the one-billion-pound mark for the first time in our history! This is a milestone that APG has long anticipated and prepared for. Our Marketing

team has worked diligently over the last several years to market ahead of this anticipated crop and found new and amazing ways in 2020 to reach consumers all over the world.

Finally, 2020 has taught us many things but two stand out to me. First, we know that we can fulfill our Mission and achieve our goals if we apply ingenuity and determination. Second, we also now know that there is always much to be thankful for even in the most challenging times.

Here’s wishing you a very bright and prosperous 2021!

APG PRESIDENT



FARMING FOR OUR FUTURE

The future comes fast. You plan, you adapt, you innovate, because that's what keeps you in business and what keeps this country fed. And we're here to help — for all the tomorrows to come.



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A Message From The APG Board of Directors Chair

BRIAN WATTE

APG BOARD OF DIRECTORS CHAIR



Dear Friends,

It has been my absolute honor to have served as the American Pistachio Growers Chairman, an association that has been a trusted partner to pistachio growers, processors and members for over 30 years.

This has been a particularly dynamic time for our industry. We have successfully navigated the marketplace in the wake of increased tariffs, received additional grant funding for nutrition and production research, welcomed more grower members, saw an increase in bearing acreage and continued to drive global demand for American pistachios, all while battling a world-wide pandemic.

The American pistachio industry saw an increase in the awareness of our many grant-funded pistachio research projects. From the protein analysis research to heart health research, to the weight management and immunity studies and the announcement about American pistachios being a complete protein, APG was able to make research one of its main consumer messages. We will continue to deepen our commitment to research on the many health benefits that come from consuming American pistachios.

We also worked tirelessly to advocate on behalf of the American pistachio grower and shared the impact the pistachio industry has on our economy. Our collective voice is critical to our future and with our continued advocacy, we will continue to be heard at both the State and Federal level.

As I have said many times, I am extremely proud of the dedication the APG board and committee members

have to the association. Our 60+ member volunteers, from across three states, give their time and expertise on eight committees and our pistachio PAC. Even when presented with a pandemic, each and every one of them still came together – virtually. Because of these volunteers and our over 800 APG members, we continue to move our pistachio community forward.

In closing, the APG board and the staff remain committed to our mission to collectively advance the American pistachio industry through research, promotion, advocacy and programs that directly benefit our members. 2021 will be an exciting time as we continue to chart a new future while delivering on our commitment.

A handwritten signature in dark ink, appearing to read "Brian Watte".

APG BOARD OF DIRECTORS, CHAIR

“Our 60+ member volunteers, from across three states, give their time and expertise on eight committees and our pistachio PAC.”

BOARD OF DIRECTORS

Executive Committee



Brian Watte Chair

BRIAN WATTE FARMS TULARE, CA

Brian Watte currently farms in Tulare, California as Brian Watte Farms. He started farming in 1983 with his late brother Mark. They started with cotton, corn, alfalfa and wheat, and in 2000 planted their first pistachios. He currently serves on the KDWCD and Elk Bayou Boards (water boards). He is the also past president of the International Agri-Center Board of Directors. Brian served on the APG Board of Directors from 2008 to 2015 and was re-elected in 2016. He is currently the Board Chair and serves as a liaison on the Membership Services Committee.

EMAIL BJWATTE1@GMAIL.COM



Dominic Pitigliano Vice-Chair

PITIGLIANO FARMS TIPTON, CA

Dominic Pitigliano has been involved in farming most of his life. He graduated from Cal Poly, San Luis Obispo, with a degree in Ag Systems Management and a minor in Ag Business. He works with his family, farming pistachios and other permanent crops. Dominic was a 2012 APG Leadership Program graduate and was elected to the APG Board in 2016. He currently is the Board Vice Chair. He also serves on the Executive Committee and serves as Chair of the Finance Committee as well as a liaison for the Government Policies and Partnerships Committee.

EMAIL DOMINIC@PITIGLIANOFARMS.COM



Dennis Woods Secretary | Treasure

WOODS FAMILY FARMS MADERA, CA

Dennis Woods was born in Fresno and lives in Madera with his wife, Cheryl. He graduated from California State Fresno University and since graduating has had two full careers. For the first 24 years he was in partnership with a childhood friend in Hestbeck's Food which was a wholesale and retail food company started locally in 1903. While running that company, he started the local United Security Bank in 1987 with a dozen other local people and he remains the Chairman and CEO. On the farming front, in 1980 he purchased his first farm 10 miles south of Harris Ranch Restaurant off of I-5 and planted 160 acres of pistachios. Then he planted another ranch into pistachios about 15 years ago, and this past year, another 60 acres of pistachios. He was elected to the APG Board of Directors in 2018 and serves on the Executive Committee and the Marketing Communications Committee.

EMAIL DWOODS@UNITEDSECURITYBANK.COM

BOARD OF DIRECTORS

Executive Committee



Rudy Hernandez

BHT & ARROYO FARMS SAN LUIS OBISPO, CA

Rudy Hernandez grew up in the Central Valley where his extended family farmed cotton, corn, almonds, citrus and grapes. After obtaining undergraduate and graduate degrees, he spent over 14 years in the accounting and finance world, participating in his first pistachio development in 2000. Since then, he has both managed and been a part of several pistachio development projects encompassing 1,500 acres. Rudy was a graduate of the first APG Leadership Program class (2011) and was elected to the APG Board in 2015. He currently serves on the Executive Committee, the Marketing Communications Committee and is the liaison for the Finance Committee.

EMAIL HFITINC@GMAIL.COM



Gary Smith

INGLEBY FARMS VISALIA, CA

Gary Smith is the U.S. General Manager for Eriksson LLC that has 3,500 acres of pistachios in Fresno County. In addition, he provides agricultural economic and business services for lending institutions and businesses in the western United States. Gary served on the APG Board of Directors from 2008 to 2015 and was re-elected in 2016. He currently serves on the Executive and Finance Committees and the Marketing Communications Committees.

EMAIL GRS@INGLEBYFARMS.COM



Justin Wylie

WYLIE FARMS FRESNO, CA

Justin Wylie is a fifth-generation farmer and partner in Wylie Farms, the family ranch management business. His father Craig and his uncle Chris Wylie have been farming pistachios since they started budding young trees in the 1970s for Bob Peterson. Justin grew up in Merced, graduated from UCSD in 2002 and now works for CAPS, PGIM as a farm manager in Fresno as well as farming his own pistachios in Madera. In 2017 he was elected to the APG Board. Currently, he serves as the Chair of the Membership Services Committee, is a member of the Executive Committee and a liaison for the Marketing Communications Committee.

EMAIL JUSTINJWYLIE@GMAIL.COM

BOARD MEMBERS



Ali Amin

PRIMEX FARMS LOS ANGELES, CA

Ali Amin is a fourth-generation pistachio grower and the founder of Primex International Trading. He manages almost 5,700 acres of pistachio orchards in California and is passionate about the pistachio industry. He graduated from California State University, Northridge with a BA in Accounting & Information Systems. He has served in various leadership positions in the industry, including past Chairman of the California Pistachio Commission. Ali was elected to the APG board in 2019 and serves on the Marketing Communications Committee.

EMAIL ALI@PRIMEX-USA.COM



Steve Burcham

S & K GAGE FARMS FIREBAUGH, CA

Steve Burcham started learning about pistachios over nineteen years ago, by working with his father-in-law Larry Gage. Learning about pistachios from Larry was an experience he will never forget. Larry inspired him to be active in APG to ensure that there continues to be a market through governmental regulations, educational services, research and marketing. Steve is currently a member of Firebaugh Rotary and was a 2013 graduate of the APG Leadership Program. He continues to be an advocate from the small pistachio farmer perspective. Steve was elected to the APG Board of Directors in 2016 and currently serves on both the Nutrition and Membership Services Committees.

EMAIL SBURCHAM@SBCGLOBAL.NET



Mia Cohen

SETTON FARMS TERRA BELLA, CA

Mia Cohen is Chief Operating Officer (COO) of Setton Farms, Inc., Setton Pistachio of Terra Bella, Inc. and Setton International Foods, Inc. She graduated from Boston University with a BA in Economics and completed her education at the Frank G. Zarb School of Business at Hofstra University, where she earned her MBA in Finance. Mia serves as Chairman of the Peanut and Treenut Processors Association (PTNPA) and is a member of the California Pistachio Export Council (CPEC). An APG member since joining the industry in 2002, Mia served on the APG Board of Directors from 2010 to 2017 and was re-elected in 2018.

EMAIL MCOHEN@SETTONFARMS.COM

BOARD MEMBERS



Danielle Kusmak

TULAROSA PISTACHIO GROVES TULAROSA, NM

Danielle has been farming pistachios since 2005 along with her husband and sons. She's a multi-generational agriculturist, currently serving as the Secretary in the Arizona Pistachio Growers Association and is a policy writer for New Mexico Education. She also serves as a board member for the NM Partnership for Math & Science Education. Danielle is a 2013 APG LeadOn graduate and serves on the Leadership Committee and the Member Services Committee.

EMAIL DKUSMAK@TULAROSA.NET



Steve Moore

STEVE MOORE FARMS FRESNO, CA

Steve More has been growing pistachios since 1982. He's been active in the agri-business industry for just as many years. He currently operates the Steve Moore farm. Originally from Visalia, California, Steve graduated from Fresno State with a degree in Business. He was elected to the APG Board in 2007, termed out later and then re-elected to his current term. Steve has been a loyal APG member for over 20 years. Steve currently serves on Finance Committee, the Marketing Communications Committee and the Nutrition Committee.

EMAIL STEVE@STEVEMOOREFARMS.COM



Alison Nagatani

C. NAGATANI FARMS EARLIMART, CA

Alison Nagatani's great-grandfather came to the United States from Japan in 1912 and purchased 20 acres of land near Ducor, California. Her family has been farming ever since. She is a fourth-generation farmer and third-generation almond and pistachio grower. She partnered with her father 10 years ago in their Earlimart farming operation. Alison attended CSU Long Beach and worked in finance and marketing after college. Alison was a 2014 APG Leadership Program graduate and was elected to the APG Board in 2015. She is the Chair of the Marketing Communications Committee, Vice Chair of the Membership Services Committee and a member of the Nutrition Committee.

EMAIL ALISON.NAGATANI@GMAIL.COM

BOARD MEMBERS



Sharon L. Roden

RODEN FARMS PASO ROBLES, CA

Sharon Roden is a fifth-generation Californian, and her family has been ranching and farming within Kern County for six generations. The Roden family planted their first pistachios in western Kern County in 1983. She is a graduate of California Polytechnic State University, San Luis Obispo with a BS in Agricultural Management. Graduating with the first APG Leadership Program class (2011), she was elected to the APG Board in 2015. She served as APG's Chair in 2017 & 2018 and is currently on the Membership Services Committee.

EMAIL NUTSNBOLTS@FIX.NET



Richard R. Searle

SEARLE RANCH PEARCE, AZ

Richard Searle is a second-generation rancher and lifelong resident of southeastern Arizona and southwestern New Mexico. He acquired his first Arizona pistachio orchard in 2002 and purchased a second one in 2011. Along with his pistachio orchards, Richard is also in the cattle business. He spent 20 years as a community banker in the region and 12 years as an elected Cochise County Supervisor. He is currently serving as Director of the Cochise County Farm Bureau, Director for the Arizona Cattle Growers Association, and is on the Board of Directors of Western Bank. Richard was elected to the APG Board in 2017 and serves on the Government Policies and Partnerships Committee.

EMAIL RICHARD2@VTC.NET



Jamie Bledsoe

GOLDEN GENES, INC., RIVERDALE, CA

Jamie's family operates farms in Riverdale and Five Points, where they grow almonds, wine grapes and pistachios. Additionally, they are involved in a partnership, farm management, and custom harvesting of pistachios. Jaime has served seven years as a Director and Chairman for Western United Dairymen, and six years on the Board of California Dairies. Jamie was elected to the APG board in 2020 and currently he is serving as the Chair of the Government Policies and Partnerships Committee.

EMAIL RICHARD2@VTC.NET

BOARD MEMBERS



Asha Munger

MONARCH NUT COMPANY DELANO, CA

In 1971, the Munger family purchased their first farm comprising of 70 acres of peaches and walnuts and a couple of years later, they purchased their first pistachio orchard. As a third-generation farmer, Asha has been working in the family business for more than 14 years. Asha received her Bachelor of Science Degree in Business Administration with an option in Leadership Management from Fresno State and is currently the Senior Director of Corporate Services within the company. Asha serves as a board member for Naturipe Farms and Vice Chairman for Naturipe Value Added Fresh. Asha was elected to the APG Board of Directors in 2020.

EMAIL ASHA.MUNGER@MUNGERFARMS.COM



Kristi Robinson

K. ROBINSON FARMS CLOVIS, CA

As long as Kristi Robinson can remember, pistachio trees have been a part of her life. When she was two, her family moved to the Central Valley where her dad managed and developed pistachio and almond orchards, Kristi now farms her own pistachio orchard. She graduated from Cal Poly, San Luis Obispo and has worked many years in the fresh produce industry. Kristi was first elected to the APG Board in 2015 and then re-elected in 2020. She is a past chair of the Leadership Committee and has sat on the Marketing Communications Committee. Currently, she is the Chair of the Nutrition Committee.

EMAIL KRISTIRSF@GMAIL.COM



Mark Sherrell

TOUCHSTONE PISTACHIO COMPANY FRESNO, CA

Mark is currently employed by Touchstone Pistachio Company as the COO and sits on the Administrative Committee for Pistachios Board. Mark has spent his entire career dedicated to agriculture and has assembled a diversified custom harvesting business and he's held executive level management positions within the almond and pistachio industries. Mark was elected to the APG Board of Directors in 2020 and has served on the Membership Services Committee.

EMAIL MARKSHERRELL@TOUCHSTONEPISTACHIOS.ORG



A BOLD COMMITMENT to Grower Partnerships, Exceptional Quality, and a Robust Retail Presence



We'd like to show you our commitment in action. Please contact Keenan Farms Grower Relations Manager, Zack Raven, at zraven@keenanfarms.com.

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COMMITTEES

2020 ANNUAL REPORT
AMERICAN PISTACHIO GROWERS

EXECUTIVE

Brian Watte, Chairman*
Dominic Pitigliano, Vice Chair
Dennis Woods, Secretary/Treasurer
Rudy Hernandez
Gary Smith
Justin Wylie

FINANCE

Dominic Pitigliano, Chair
Jim Hering, Vice Chair
Stewart Fellner
Steve Moore
Gary Smith
Diane Wood
Scott Woodard

GOVERNMENT POLICIES AND PARTNERSHIPS

Jamie Bledsoe, Chair
Karun Samran, Vice Chair
Doug Anderson
Thom Dille
Sherry Heuler
Adam Kusmak
Larry Lowder
Kent Naraghi-Grcich
Tim O'Neill
Richard Searle
Joseph Setton
Larry Wilkinson
Jim Zion

LEADERSHIP

Danielle Kusmak, Chair

MARKETING COMMUNICATIONS

Alison Nagatani, Chair
Ali Amin, Vice Chair / Mojgan
Amin, Alternate
Caleb Adams / Nick Rush, Alternate
Tony Bagato / Joel Perkins,
Alternate
Rick Borges / Jeremy Blackwell,
Alternate
Mia Cohen / Joseph Setton,
Alternate
Rudy Hernandez / Adam Kusmak,
Alternate
Paul Huckabay / Elizabeth Keenan,
Alternate
Steve Moore / Sean Nicholson,
Alternate
Kamie Munger / Ahmad Foroutan,
Alternate
Adam Orandi / Jim Zion, Alternate
Rudy Placencia / Alyssa Valdez
Alternate
Gary Smith / Justin Wylie, Alternate
Derick Strain / Thom Dille, Alternate
Dennis Woods / Jimi Valov,
Alternate
CPEC Representative, Adam
Orandi

MEMBERSHIP SERVICES

Justin Wylie, Chair
Alison Nagatani, Vice Chair
Steve Burcham
Bob Engleman
Jeff Gibbons
Joe Gray
Sherry Heuler
Rich Kreps
Danielle Kusmak
Rudy Placencia
Zack Raven
Sharon Roden

Ryan Scagliotti
Mike Smith
Kirk Squire

NUTRITION

(Subcommittee of Marketing)

Kristi Robinson, Chair
Gilbert Garcia, Vice Chair
Steve Burcham
Ahmad Foroutan
Jean Heuler
Drew Hoffman
Janice Lowder
Alison Nagatani
Simi Robani
Elise Silvester
Patti Watte

PISTACHIO PAC

Robert Lake, Chair
Jimi Valov
Jim Zion

*Chair Watte is an ex-officio member of all committees.

Report of Independent Auditors

TO THE BOARD OF DIRECTORS
AMERICAN PISTACHIO GROWERS



Report on the Financial Statements

"We have audited the accompanying financial statements of American Pistachio Growers ("the Organization"), which comprise the statement of financial position as of August 31, 2020, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements."

Management's Responsibility for the Financial Statements

"Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error."

Auditor's Responsibility

"Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in Government Auditing Standards, issued by the Comptroller General of the United States.

Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion."



Opinion

"In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of American Pistachio Growers as of August 31, 2020, and the changes in its net assets and its cash flows for the year then ended, in accordance with accounting principles generally accepted in the United States of America."

Other Matter

"Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional

procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements taken as a whole."

Other Reporting Required by Government Auditing Standards

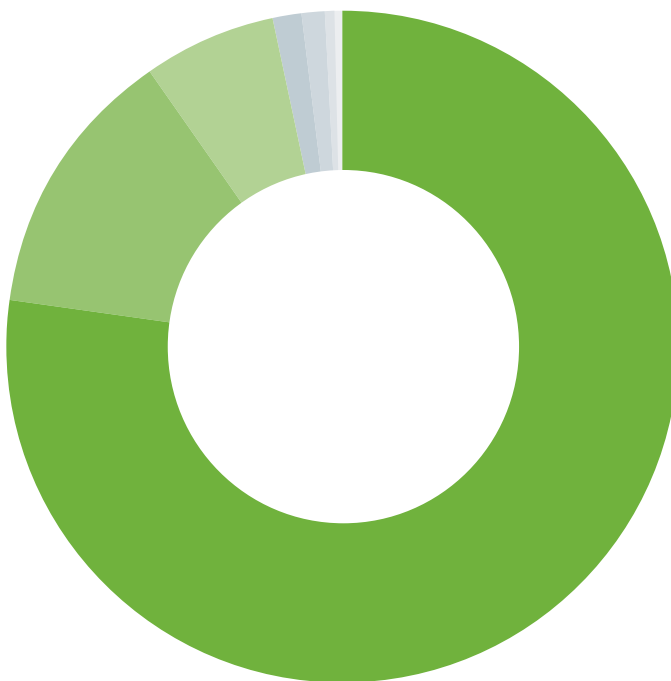
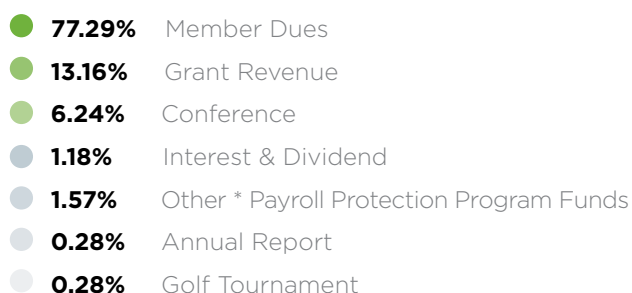
"In accordance with Government Auditing Standards, we have also issued a report dated November 5, 2020, on our consideration of American Pistachio Growers' internal control over financial reporting and our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the American Pistachio Growers' internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering American Pistachio Growers' internal control over financial reporting and compliance."

Fresno, California | November 5, 2020

Audited Financials: Revenue and Expenses

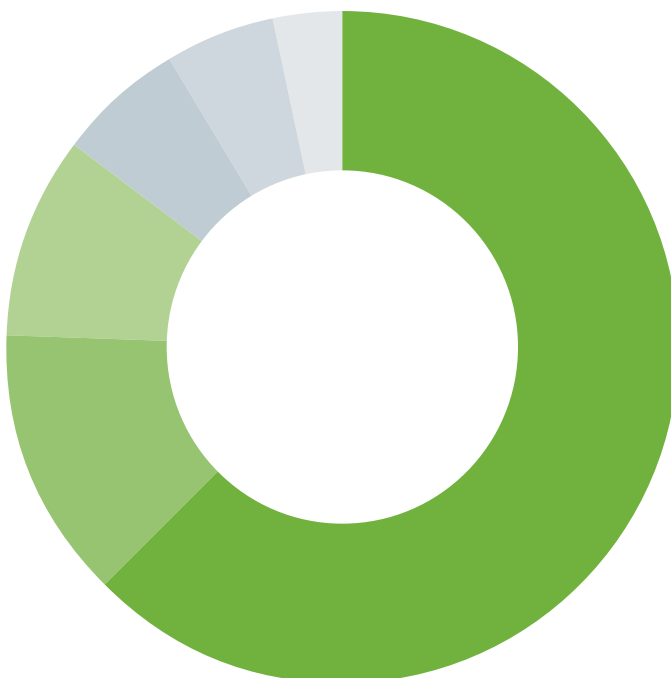
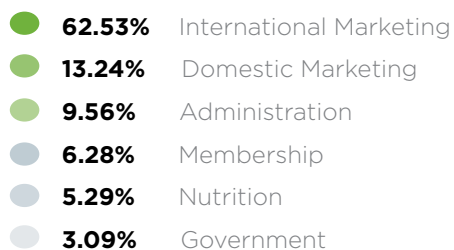
Revenue

Total in Percentages



Expenses

Total in Percentages





Statement of Financial Position

Assets

Current Assets

Cash & Cash Equivalents	\$2,504,359
Investments	\$8,471,302
Grants Receivable	\$211,148
Prepaid Expenses	\$187,700

Total Current Assets	\$11,374,509
-----------------------------	---------------------

Security Deposit	\$6,000
Property & Equipment, Net	\$55,350

Total Assets	\$11,435,859
---------------------	---------------------

Liabilities & Net Assets

Current Liabilities

Accounts Payable	\$1,226,636
Accrued Expenses & Other Liabilities	\$83,530

Total Current Liabilities	\$1,310,166
----------------------------------	--------------------

Net Assets - Commitments & Contingencies

Without Donor Restrictions	\$10,064,188
With Donor Restrictions	\$61,505

Total Net Assets	\$10,125,693
-------------------------	---------------------

Total Liabilities & Net Assets	\$11,435,859
---	---------------------

Statement of Activities

For The Year Ended - August 31, 2020

Revenues, Gains & Other Support

Item	w/out Donor Restrictions	w/ Donor Restrictions	Totals
Member Dues	\$10,312,592	-	\$10,312,592
Grant Revenue	\$1,770,337	-	\$1,770,337
Annual Meeting	\$832,278	-	\$832,278
Gain on Debt Forgiveness	\$210,000	-	\$210,000
Annual Report	\$37,500	-	\$37,500
Golf Tournament	\$37,500	-	\$37,500
Interest & Dividend Income	\$157,516	-	\$157,516
Contributions	-	\$3,975	\$3,975
Total Revenues, Gains & Other Support	\$13,357,723	\$3,975	\$13,361,698
Net Assets Released From Restrictions	\$6,413	(\$6,413)	-
*Restrictions satisfied by payment of related expenses.			
Total Revenues, Gains & Other Support	\$13,364,136	(\$2,438)	\$13,361,698
*After new assets released from restriction.			

Expenses

Item	w/out Donor Restrictions	w/ Donor Restrictions	Totals
Program Services	\$12,826,846	-	\$12,826,846
Management & General	\$1,082,215	-	\$1,082,215
Total Expenses	\$13,909,061	-	\$13,909,061
Change in Net Assets	(\$544,925)	(\$2,438)	(\$547,363)
Net Assets *Beginning of year	\$10,609,113	\$63,943	\$10,673,056
Net Assets *End of year	\$10,064,188	\$61,505	\$10,125,693

*See report of independent auditors and notes to financial statements. () indicates a negative amount



Statement of Cash Flow

Cash Flows From Operating Activities

Change in Net Assets	(\$547,363)
Depreciation	\$33,430

Change in Operating Assets

Grants Receivable	(\$22,501)
Prepaid Expenses	(\$66,547)

Change in Operating Liabilities

Accounts Payable	\$698,393
Accrued Liabilities	(\$139,581)

Cash Flows From Investing Activities

Purchase of Property & Equipment	(\$4,909)
Purchases of Investments	(\$12,404,053)
Proceeds From Sale of Investments*	\$10,724,000
Net Cash From Investing Activities	(\$1,684,962)

Net Change in Cash & Cash Equivalents	(\$1,790,424)
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Cash & Cash Equivalents *Beginning of year	\$4,294,783
Cash & Cash Equivalents *End of year	\$2,504,359

*See report of independent auditors and notes to financial statements. () indicates a negative amount



GOVERNMENT AFFAIRS

GOVERNMENT POLICIES & PARTNERSHIPS COMMITTEE REPORT

JAIME BLEDSON, GOVERNMENT POLICIES & PARTNERSHIPS COMMITTEE CHAIR
CADEE CONDIT, APG DIRECTOR, GOVERNMENT RELATIONS

The American Pistachio Growers Government Policies & Partnership Committee (GPPC) will once again reach back to the previous Annual Conference to update pistachio growers on federal government pistachio matters; 2020 is special, however, because of the coronavirus pandemic. The coronavirus pandemic challenged U.S. pistachio growers, and this year's GPPC report aims to capture federal government events that involve programs impacted directly and indirectly by COVID-19.



The March 2020 APG Annual Conference was attended by over 1,100 attendees, all anxious to learn about APG's many successful programs. Few realized what awaited the nation mere days after the conclusion of the conference. Not only did APG have the best U.S. pistachio industry conference in the history of the U.S. pistachio industry, but the following week a delegation of APG growers traveled to Washington, DC to lobby for an increase in federal funding for the industry's naval orangeworm program. It was in that week when the nation shut down because of the coronavirus pandemic.

The coronavirus pandemic required the U.S. pistachio industry's APG to be even more involved with the federal government because of the new programs adopted both by Congress and the Trump Administration. As you will read, new federal programs were implemented to assist pistachio

growers and processors, and existing programs had to be administered by the Administration. With the federal executive branch departments and agencies shut down, all business had to be conducted either by phone call or email. The federal offices were anxious, however, to help U.S. pistachio growers and processors. What you will read in this GPPC report are summaries of both new and existing programs handled by APG; many of the existing programs impacting pistachios were carried over from 2019 and will continue into 2021.

During the last days of the 116th Congress, new COVID legislation passed Congress and was eventually signed into law by President Trump. Since several agricultural programs are discretionary (reliant upon annual funding), it is currently unknown if the Trump or Biden Administrations will implement the programs. These agricultural programs are described below.



[READ MORE ON GOVERNMENT AFFAIRS FEDERAL REPORT \(PG. 28\)](#)

2020 FEDERAL REPORT

COVID 19 ASSISTANCE

With the outbreak of the coronavirus pandemic, the U.S. Department of Agriculture launched two direct assistance programs to assist farmers whose operations were impacted by the virus, authorized by the CARES Act and another USDA authorization, the Commodity Credit Corporation (CCC).

CORONAVIRUS FOOD ASSISTANCE PROGRAM

The Coronavirus Food Assistance Program (CFAP 1), established in April 2020, was the first of USDA's programs to support farmers and ranchers during the COVID-19 pandemic. Pistachios were initially excluded from the program's largest payment category, but pistachios were made eligible for all three of the program's payment categories, following APG's successful appeal to the USDA. The CFAP 1 application period spanned from May 26, 2020 through September 11, 2020. U.S. pistachio growers from California and New Mexico received assistance under this program. The Arizona Farm Service Agency Committee interpreted the regulation differently from California and New Mexico. Arizona pistachio growers were barred from receiving payment; however, the FSA ruling is being appealed.

CORONAVIRUS FOOD ASSISTANCE PROGRAM 2

U.S. pistachio growers were eligible to apply for funds under the Coronavirus Food Assistance Program 2 (CFAP 2), the second USDA direct payment program for producers who faced market disruptions and associated costs because of COVID-19. CFAP 2 is distinct from the first Coronavirus Food Assistance Program (CFAP) in that CFAP 2 pistachio payments were based on pistachio sales during the 2019 calendar year, as opposed to the three categories of CFAP 1. Enrollment for CFAP 2 began on September

21, 2020 and ran through December 11, 2020. We continue to monitor pistachio industry impacts from COVID-19 and advocate on behalf of your industry with USDA officials and federal legislators to establish another coronavirus assistance program that better fits the needs of the U.S. pistachio industry.

AGRICULTURE PROGRAMS IN THE DECEMBER 2020 COVID RELIEF PACKAGE

President Trump signed the Coronavirus Relief Package on December 27, 2020 that included necessary funding for agricultural programs. According to the summary published by the U.S. House of Representatives Committee on Appropriations, the Office of the Secretary was provided \$11.2 billion to prevent, prepare for, and respond to coronavirus by providing support to agricultural producers, growers, and processors. This package also provides \$100 million of additional Specialty Crop Block Grant funding, \$400 million to the Emergency Food Assistance Program, and \$13 million to the Commodity Supplemental Food Program. The Payroll Protection Program (PPP) was extended to March 31, 2021 and granted an additional \$284 billion.

USDA SECTION 32 PISTACHIO PURCHASE

Congress established the Section 32 program to purchase surplus commodities for a variety of purposes in the original Farm Bill of the 1930s. These "bonus buys" are distributed by USDA to emergency feeding programs, such as food banks and other non-profits. APG successfully petitioned the Agricultural Marketing Service, USDA, that pistachios be granted a Section "32 bonus buy" and

consequently were awarded a purchase of \$32.2 million in roasted in-shell pistachio in September 2020.

APPROPRIATION FOR NAVAL ORANGEWORM PROGRAM

In the waning days of December 2020, Congress passed a massive omnibus legislative package that included FY 2021 annual appropriations measures, COVID aid and stimulus, and a number of must-pass bills prior to the end of the 116th Congress. The Navel Orangeworm (NOW project) was funded at \$8 million, a \$2 million increase over the FY 2020 funding.

APHIS has indicated an appropriate budget for the NOW program is \$21 million per year. The \$6 million appropriated by Congress in FY 2020 and California Pistachio Research Board's \$2.5 million NOW budget are only 40 percent of the funding needed to adequately finance the comprehensive NOW pilot project. Additional funds are needed, as it is estimated NOW causes tree nut growers to lose approximately \$800 million annually. Representatives from APG and the Navel Orangeworm Action Committee (NOWAC) visited Washington, DC to advocate for an increased FY 2021 NOW appropriation. APG continues to educate policy makers and Administration officials on the need to fund the NOW project.

U.S.-CHINA TRADE

The U.S.-China Phase One Trade Agreement entered into force on February 14, 2020. As part of this agreement, China committed to purchase at least an average of \$40 billion annually of U.S. food, agricultural, and seafood products over the next two years. As of November 2020, China has met roughly 65% of the commitment to purchase U.S. agricultural products. The U.S. reported exporting 28,730 metric tons (MT) of pistachios to China in crop year (CY) 2020, which is an increase of 2,579 MT from the previous year. The U.S. exported 31,238 MT of pistachios to Hong Kong in CY 2020, which is a decrease of 57,819 MT from CY 2019 amounts.

Importantly, President Trump kept U.S. tariffs on Chinese products in place despite signing the phase one deal and newly inaugurated President Joe Biden disclosed he would not act immediately to remove tariffs on Chinese products. Biden also expressed that a phase two trade agreement with China will not be an initial priority for his administration.

Although the signing of the phase one agreement signaled a de-escalation in trade conflict between the world's two largest economies, more work must be done to normalize trade conditions. The tariff on U.S. raw pistachios is 50 percent, and the tariff on U.S. roasted pistachios is 15 or 30 percent depending on importer classification. APG has sought adequate trade assistance to mitigate some of the damage resulting from retaliatory tariffs, as well as funds to strengthen existing markets and develop new ones.

PROSPECTIVE U.S.-UK TRADE AGREEMENT

With the U.S. and United Kingdom working to reach a trade agreement, APG communicated the priorities of U.S. pistachio exporters to the UK House of Lords and U.S. officials involved in the negotiation process. The UK began allowing in-shell and shelled pistachios into their territory duty-free as of January 1, 2021. APG expressed support for this policy and the maintenance of this rate in an eventual U.S.-UK trade deal. APG also recommended that the UK adopt a risk-based approach to its pesticide regulations and develop mycotoxin import standards with greater flexibility than those currently in place in the EC. The U.S. exported 8.5 million pounds of pistachios to the UK in 2019, valued at \$36.8 million.

U.S.-MEXICO-CANADA AGREEMENT

The U.S., Mexico, and Canada completed trade negotiations to replace the North American Free Trade Agreement (NAFTA) with the U.S.-Mexico-Canada Agreement (USMCA) in November 2019. The agreement became effective July 1, 2020. Under this agreement, U.S. pistachios continue to receive the same duty-free treatment that was afforded under NAFTA,

which was secured by APG. When comparing NAFTA with the USMCA, the pistachio trade provisions remain the same. APG carefully monitors implementation of the deal and its effect on pistachio trade.

POTENTIAL U.S.-EU TRADE AGREEMENT

Negotiations towards a comprehensive trade agreement between the U.S. and EU have essentially stalled, and it is not clear when to expect significant progress to be made towards this prospective deal. The Biden administration does not intend to focus on negotiating trade agreements until there has been sufficient investment in effort and resources towards domestic issues, namely health and labor. Even so, the August 2020 decision for the European Commission to end tariffs on U.S. frozen live lobsters in exchange for tariff reduction on certain European goods is a step towards repairing transatlantic trade relation and will likely signal good faith in further negotiating rounds. The agreement was monumental as it marked the first time in twenty years that the decision was made to reduce tariffs. Improved relations and good faith communication will be crucial in overcoming external complications like the Boeing-Airbus dispute that continue to disrupt progress in U.S.-EU trade talks. The EU is one of the U.S. pistachio industry's most important export market and received 172 million pounds of pistachios in 2019, valued at \$649 million.

U.S.-JAPAN TRADE AGREEMENT

The U.S.-Japan Trade Agreement went into effect on January 1, 2020. The agreement enables roasted pistachios, previously subject to a 5 percent tariff, to enter the Japanese market tariff-free; APG advocated for the zero tariff. Raw pistachios were already receiving tariff free treatment in Japan's market. The U.S. exported 2,270 MT of pistachios to Japan in CY 2020. Tariff treatment for the products covered under this agreement match the tariffs Japan provides preferentially to countries in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).

MARKET ACCESS PROGRAM (MAP)

The U.S. pistachio industry was awarded \$1,742,153 in Market Assistance Program funds for 2021, a 1.5-percent increase compared to last year. MAP funds are to be used towards overseas marketing and promotional activities to enhance trade and export market development. These MAP funds will help pistachio growers and handlers combat the strong global competition, particularly as pistachio production is increasing worldwide.

U.S.-INDIA TRADE TALKS

The U.S. and India have been negotiating a limited trade pact since 2018 that has the potential to benefit the U.S. pistachio industry. Few details have been released by either government pertaining to the provisions of the deal, but reports indicate that U.S. and Indian officials are hoping to partially restore duty-free access to the U.S. market for some products from India while removing barriers to U.S. products exported to India. The tariff on U.S. raw pistachio exports to India currently is 10 percent; India imported 7,518 MT of pistachio from the U.S. in calendar year 2019. There is strong room for growth, however, as the country consumed 16,724 MT of pistachios that same year. APG is working with government and non-government trade experts to maximize benefits to the U.S. pistachio industry. In support of APG efforts, Congressmen McCarthy and Nunes sent a letter to the U.S. Secretary of Agriculture advocating for the reduction or elimination of Indian pistachio tariffs in any trade agreement reached with India.

IRANIAN RAW PISTACHIO ORDER ADMINISTRATIVE REVIEW

The pistachio antidumping trade order is entitled to administrative review on the anniversary of the order. The 1986 Iranian raw in-shell pistachio antidumping order anniversary is July. An administrative review

allows an interested party to request the order to be reviewed to remove, lower or increase the tariff. However, for the order to be reviewed, Iranian raw pistachios would have to be imported. Since the U.S. has imposed sanctions against Iran, no Iranian pistachios have entered the U.S. When the pistachio unfair trade petitions were filed in 1985, the petitioners were the California Pistachio Commission, Western Pistachio Association (APG) and several companies. Today, there are only two original petitioners in existence: APG and Keenan Farms.

FEDERAL WATER POLICY

Western water policy is always a multi-faceted and constantly evolving matrix of federal and state policies, laws and regulations.

The event of 2020 which could have the greatest impact on this matrix from the federal perspective, at least for the next four years, was the November election of a new President, Joe Biden, and new Vice President, Kamala Harris, the former U.S. Senator from California. During his Presidency, President Trump directed federal agencies to have a special focus on the delivery of water to California agricultural users and issued two detailed directives (in 2018 and 2020) to articulate this focus. One important question will be whether the Biden-Harris administration will continue to place high importance from the White House level on water supplies and water infrastructure in California.

What is for certain is that the change in administration will mean an entirely new slate of officials at the U.S. Department of Interior and the U.S. Bureau of Reclamation, as well as at all other federal agencies. The process of selecting and confirming new agency officials always takes time, often as long as several months. Those officials must then settle in with their new responsibilities. It is almost impossible to predict whether the new Biden team will review some of the actions taken by the Trump administration (described below), although some of them are likely candidates given the controversy that surrounded them as they were put in place.

U.S. CONGRESS

The U.S. Congress considered a number of policy-type pieces of legislation on water issues during the year. However, the only major bill to make it through the entire legislative gauntlet was the bi-annual Water Resources and Development Act (WRDA), which primarily affects U.S. Army Corps of Engineers projects. Several pieces of legislation were introduced to address a variety of topics, such as subsidence and canal repair, drought, water infrastructure authorization and funding, environmental justice and climate change. While none of the bills were ultimately enacted, they have likely laid the groundwork for efforts in the coming years. The year in Congress was of course greatly impacted by the coronavirus pandemic, which led to a number of remote hearings and fewer than usual days of legislative session when House Members and Senators were physically in Washington, DC.

The U.S. Congress did make significant progress in identifying some federal funds to assist with the repair of the Friant-Kern Canal; the final amount of these funds (\$206 million) was included in the appropriations bill for the Bureau of Reclamation for the Fiscal Year 2021. In addition, the U.S. Bureau of Reclamation made significant progress in moving the process forward so that construction can begin on this repair, as the final feasibility report for the project was transmitted to Congress in July. This project would restore 33 miles of the Friant Kern Middle Reach.

In July, the Democratic majority in the House introduced and passed H.R. 2, the “Moving Forward Act,” a large, multi-faceted infrastructure bill spanning highway, transportation, rail and water infrastructure. While this bill was not considered at all by the U.S. Senate, it has been reported that the Biden administration will definitely look to propose a large infrastructure package – and there will be much interest in including water infrastructure in such a package. H.R. 2 includes some provisions which are not acceptable to agricultural stakeholders, at least in the form they were in when the bill was voted on by the House.



[READ MORE IN THE STATE REPORT \(PG. 39\)](#)

FEDERAL AGENCIES

New BiOps for California. Early in 2020, the U.S. Departments of Interior and Commerce finalized their efforts to revise and incorporate current science into the Biological Opinions (BiOps), which govern pumping through the Delta. The Department of Interior/U.S. Bureau of Reclamation implemented the rules of the new BiOps into their actions under the Coordinated Operating Agreement (COA) for Delta operations. There was considerable debate about the new BiOps as they moved through the agency processes, and as a result, once finalized they were challenged in court by the Newsom administration in California. Although the BiOps were temporarily put-on hold in the spring by a federal judge's decision, the Bureau of Reclamation has been operating under the BiOps since that temporary hold expired.

Shasta Dam. The U.S. Bureau of Reclamation also continued to move forward their efforts to complete all process requirements to raise Shasta Dam and thereby increase the storage capacity at Shasta. Specifically, in late November, the final supplemental Environmental Impact Statement was completed and released. However, this project is highly controversial and it does not appear likely that Congress will approve federal funds for the project at any time in the near future.

WOTUS Definition. In June 2020, federal agencies finalized new rules to implement the Waters of the United States (WOTUS) definition of navigable waters; lawsuits were immediately filed to challenge the final rule. These lawsuits continued a very long and contentious legal battle over this issue. The new rules would streamline the definition so that it:

- includes four simple categories of jurisdictional waters,
- provides clear exclusions for many water features that traditionally have not been regulated, and
- defines terms in the regulatory text that have never been defined before.

Revision of NEPA Regulations. In July, the Council on Environmental Quality (CEQ) in the Trump Administration completed the first-ever overhaul of the regulations which implement the National

Environmental Protection Act (NEPA), originally enacted in 1970. The new regulations are intended to streamline the process of environmental review (as in the preparation of an Environmental Impact Statement, or EIS) for various projects, including water infrastructure projects – and thus make possible an accelerated timeline for their development.

FARM BILL

The passage of the Agricultural Adjustment Act of 1933 remains one of the most important U.S. federal agricultural events; the U.S. Supreme Court determined it unconstitutional in 1936 but was reenacted by the U.S. Congress in 1938. Since this precedent-setting event in the 1930s, the U.S. Congress has reviewed what has become known as the “Farm Bill” every four or five years.

The current Farm Bill is scheduled to expire in 2023. There are new Congressional Agriculture committee Chairpersons in both in the U.S. House of Representatives and U.S. Senate – Congressman David Scott (D-GA) and Senator Debbie Stabenow (D-MI) – who are responsible for the review of existing farm programs, arrangement of hearings and drafting the new Farm Bill. If previous Congressional Farm Bill precedent is followed, the Committee chairpersons will arrange field hearings around the country, perhaps as early as 2021, followed by hearings in Washington, D.C., with final considerations and negotiation of legislation in late 2022 or 2023.

The specialty crop industry, including pistachios, is expected to have strong Congressional agriculture support, as House Agriculture Committee Chairman David Scott's home state of Georgia has a strong specialty crop industry; Chairman Scott is also a strong supporter of food and nutrition programs, which are a large percentage of the annual agriculture appropriation and mandatory funding in the Farm Bill. Senate Chairman Stabenow's home state of Michigan is known for various specialty crop industries, and she is expected to champion the specialty crop industry programs. Unlike some other congressional committees, which have strong different policy positions, the agriculture committee is known for working together across party lines and agricultural sectors to benefit the U.S. agriculture industry.

It is under the Farm Bill that the APG grower members receive most of their federal agricultural program support, either directly or indirectly. There are well known programs that support APG membership, such as the federal marketing order, Market Access Program (funds generic export programs for the EU, India, etc.), Technical Assistance for Specialty Crops (aflatoxin), Tree Assistance Program (Bushy Top Pistachio Syndrome), the Specialty Crop State Block Program, and various crop insurance programs. Some of the lessor known continuous programs that also support APG grower members are the annual Specialty Crop Pest appropriation (navel orangeworm), National Clean Plant Network Program, IR-4 Pesticide Program, Agriculture Research Service (aflatoxin research), NASS (pistachio statistics), Foreign Agriculture Service (government to government agriculture trade negotiations).

The coronavirus pandemic showed weaknesses in the federal government's lack of understanding of the specialty crop industry. Given what has been learned in the midst of the coronavirus and the gaps in understanding that have been highlighted, the next Farm Bill negotiators will hopefully remember all that has occurred in agriculture policy in 2020 and write a Farm Bill that shields the U.S. specialty crop industry and the supply chain from national disruption, such as that which we faced this past year. As the time draws near for the next Farm Bill, your APG government relations team will work to remind congressional agriculture leaders of the gaps that were experienced by many pistachio growers and businesses and to educate them on policy and procedures that would best benefit the U.S. pistachio industry.

IMMIGRATION/LABOR

Federal farm labor issues remained stalled in Congress in 2020 while continuing to be intertwined with immigration, DACA, and Mexican border wall issues. Even prior to the Trump administration that began in 2017, the issues, while not necessarily statutorily connected, were and are politically controversial. However, in 2019, a bipartisan congressional coalition led by Representative Zoe Lofgren (D-CA) introduced the Farm Workforce Modernization Act and was subsequently passed by the House in late 2019. The legislation was not considered in the Senate and never

became law; it would have provided a channel for alien agricultural workers to obtain legal immigration status through a new status called a certified agricultural worker (CAW).

Early in his administration, President Biden sent to Congress immigration reform legislation, U.S. Citizenship Act of 2021, which intends to provide a pathway to citizenship for many farm workers. Like previous immigration bills, we expect the President's legislation to be controversial in Congress.

FOOD SAFETY - FSMA

The Food Safety Modernization Act (FSMA) was signed ten years ago, and it continues to be implemented. In 2020, the FDA rolled out its "New Era of Smarter Food Safety Blueprint," that intends to modernize the FDA on the food safety technology front. A piece of this blueprint is food traceability. In FSMA, Congress included the mandate for additional traceability and recordkeeping requirements for foods that are designated high-risk. In the fall of 2020, FDA published the proposed rule for additional recordkeeping requirements for high-risk foods; the additional recordkeeping requirements are only required for those foods that FDA includes on the Food Traceability List. Tree nuts are not included on the proposed list, currently; however, nut butters are on the proposed Food Traceability List. As the proposed rule currently stands, the traceability and recordkeeping requirements would go into effect upon the creation of the nut butter.

FDA hopes that the final rule will provide a framework for the U.S. food industry and that the measures included in the regulation will be adopted on a voluntary basis for those food categories not mandated to comply.

As the COVID-19 pandemic struck the U.S., the food supply endured significant changes and initially abrupt halts to many processes. The FDA issued a number of temporary guidance documents that provided flexibility to the food industry and enforcement discretion to the agency in regards to a number of FSMA requirements for domestic and foreign foods.

SANITARY AND PHYTOSANITARY ISSUES

OCHRATOXIN A

APG, in consultation with USDA, is working to counter a proposed EU regulation for a maximum limit on ochratoxin A (OTA) in pistachios of 5ppb (The FDA policy is for 20ppb). OTA is a mycotoxin found in various foods, including pistachios. The U.S. does not regulate this contaminant in pistachios, and Codex, the international standard-setting body, has not established maximum limits for this contaminant in pistachios. APG believe the current proposal is much too low, and the proposed maximum limit will not advance food safety more than a higher limit would offer. We also believe that if the current proposal is finalized, it will severely impede trade with Europe, our second largest trading partner.

Based on our experience with statistics from our aflatoxin sampling and testing program, we are able to surmise that a low maximum limit for OTA in pistachios would increase rejections of pistachio shipments into the EU at a higher proportion than aflatoxin-related rejections. Your APG regularly communicates with USDA officials in the U.S. and in Europe to educate them on the impact this proposed regulation will have on our industry. Our decades of experience in government relations have shaped our efforts on your behalf. Government-to-government communications have proven to be the most effective in favorable outcomes.

We assume that regulations of some kind for a maximum limit of OTA in pistachios will be finalized in 2021 and implemented in 2022. To that end, the USDA has been requested by the federal marketing order to establish a verifiable sampling and testing protocol for OTA in pistachios. We continue to communicate with USDA officials in their capacity as negotiators between the U.S. and the EU on this proposed policy.

CHLORATE

Over the past few years, APG has been monitoring a proposed regulation in the EU regarding the maximum residue level (MRL) of chlorate residue found in pistachios. Chlorate is a by-product of

chlorine disinfectants used in drinking water and in food processing. The EU's originally proposed MRL (0.03ppm) would have been unquestionably too low and significantly unattainable by the U.S. pistachio industry. APG worked with USDA officials, on behalf of our members, to provide them information on pistachios and pistachio production, and the damage this regulation posed to our industry. In 2020, the EU finalized a much higher MRL (0.1ppm) for chlorate in pistachios that went into effect this past summer. In the final regulation, a great deal of power was provided to the EU Member States on the control of chlorate in foods and how each Member State would decide if or how products would be removed from the marketplace. The regulation will be reviewed in no less than five years.

USITC REPORT ON GLOBAL MRLS

In Fall 2019, the U.S. International Trade Commission (USITC) initiated an investigation, at the request of the U.S. Trade Representative's Office, regarding low or missing global maximum residue limits (MRLs) for pesticides and the impact of international policies on global agricultural trade. The investigation provided an opportunity for APG to provide USITC a description of the challenges our members face in the international marketplace and the hurdles that you face in your growing operations from mycotoxins and pests with ever changing and in many countries, lowering of MRL regulations. The investigation was handled in two parts, and APG submitted comments in the second part early in 2020 on the interplay between our need for pesticides to control the navel orangeworm and the resulting aflatoxin contamination in damaged nuts. APG, additionally, shared with USITC investigators specific country challenges that our members have experienced due to pesticide residue regulations. The USITC MRL Volume 2 Report will be published in early 2021.

In the coming years, the regulatory landscape for pesticide policy is likely to grow tighter, as more countries move away from risk-based decisions towards hazard-based. The precautionary principle employed in the EU, as well as the Farm to Fork Strategy, is driving pesticide use reauthorizations and MRL changes

towards stricter policies in many active substances. APG continues to advocate on your behalf with FAS USDA regarding proposed global MRL changes.

FEDERAL AND STATE PESTICIDE NEWSLETTERS AND MRL DATABASE

APG publishes the "Federal and State Pesticide Newsletter" each month. The report focuses on federal and state pesticide regulatory information as well as global MRL updates. The 2020 APG MRL database was published in early February. All of these reports may be found on the APG Power website as an added benefit to our grower and handler members. Noted in our report on the USITC MRL report, pesticide policies in many export markets are growing increasingly strict; the reports provided to our members intend to supply you with the current information to aid your decision-making for your pistachio business.

2020 WORLD PISTACHIO TRADE REPORT

For the thirteenth consecutive year, APG has sponsored the only World Pistachio International Trade report, read by industry experts and government officials. The report offers stakeholders a global perspective on the world pistachio market and international trade. Due to governments reporting of annual pistachio trade at different times throughout the year, the World Pistachio Trade Report is typically published each year in October to capture the majority of the previous year's trade data.

GOVERNMENT POLICIES AND PARTNERSHIP COMMITTEE

I want to take this opportunity to thank the members of the GPPC for their service and dedication in developing both federal and state government policies for the U.S. pistachio industry.



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2021 JUST GREW BRIGHTER



A new year means change and new opportunities. Meridian Growers will be ready for crop year 2021 with a brand new processing facility located near Firebaugh, CA. This new plant will utilize the latest technology and processing techniques to meet worldwide customer demand for American pistachios. What will not change is our commitment to maximize returns to our growers over the long run as well as our simple and straightforward approach to business with an experienced staff you have known and trusted for years. Contact us today so we can discuss how we can successfully work together in 2021 and beyond.

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AMERICAN PISTACHIO GROWERS

FRONT — AND — CENTER

FOR POLITICAL ACTION

The American Pistachio Growers Political Action Committee (APGPAC) is a legal entity comprised of APG members. They recognize the need to foster relationships with elected officials who will help protect and grow the U.S. pistachio industry.

APG administers the PAC on behalf of its members to ensure ballot initiatives, campaigns and candidates effectively represent the value of the pistachio industry both in economic terms and for its sustainable food production in all three pistachio-producing states.



Update From Pistachio PAC Chairman

DR. ROBERT LAKE
PAC CHAIRMAN



The primary goal of the American Pistachio Growers Pistachio Political Action Committee (APGPAC) is to educate candidates for Congress about the U.S. pistachio industry and APG's policies and goals. Although APGPAC strives for total national support from both the Democrats and Republicans, APGPAC focuses its attention on representatives from Arizona, California, and New Mexico. Because pistachio growers and friends of the U.S. pistachio industry have contributed to APGPAC, the APGPAC is one of the largest specialty crop PACs in the U.S. VAPGPAC sees and values the importance of supporting candidates who have and will recognize important pistachio policy issues. APGPAC made over 60 contributions in the 116th Congress.

The 116th congress, (2019 and 2020) was challenging for APGPAC. As you will read in the other APG annual reports our trade association was involved in many domestic and international issues representing the APG's membership.

In April 2018 when President Trump invoked national security measures against the Peoples Republic of China (PRC) few thought the retaliatory tariffs by the PRC would last into 2020. The great challenge for 2021 will be resolving U.S. China trade dispute.

How long the U.S. China trade dispute will last is unknown and only Presidents Biden and Xi Jinping can now resolve the trade problem.

The APG has been very successful over the decades in removing tariffs and non-tariff barriers but there will always be tariff and non-tariff issues to be resolved. Whether the White House is occupied by a Democrat or Republican or Congress is controlled by Democrats or Republicans your American Pistachio Growers will have to resolve issues impacting your pistachio investment. In the Trump Administration many existing programs were initiated, amended and repealed. These programs involved water, trade, taxes, food safety, etc. During the same period Congress passed laws impacting the same programs. The U.S. pistachio industry will be challenged by the new Biden Administration, just as it was by the previous administrations since 1980. Each President and new Congress poses a challenge; some of these challenges are shared by all businesses but there are always proposals impacting only your pistachio industry.

The APG has many tools to tackle these issues and one of the tools is the Pistachio PAC. Since we live and work in a democracy, we have no other option but to be involved in federal government matters. Without the help from your personal contributions to support the PAC, none of APG federal work could be done. As we approach the 117th Congress and a new administration, we must continue to be involved. Although we are in a contentious spot in U.S. politics, it is imperative that Democrats and Republicans come together to reinforce our pistachio industries objectives and APGPAC is aiding in this effort.

CONNECTING
AMERICAN PISTACHIO

MEMBERS

The past year started with great excitement and transformation within American Pistachio Growers. Numerous new initiatives to connect members were launched, educational opportunities were increased, and the American Pistachio Conference celebrated its 13th year. Even though a global pandemic forced us to cancel or postpone many of our in-person events for the remainder of the year, APG remained committed to our members.



Our investments in time and resources have yielded some incredible new membership recruitment and retention strategies for the coming years.

We are actively engaged in endeavors that support our mission of advancing the American pistachio industry and will continue to build opportunities for our diverse membership to connect with each other, their local community and industry professionals.



The 2020 American Pistachio Growers Annual Conference in Monterey, California welcomed over 1200 members, industry supplies and guests. The three-day event was packed full of information – from pistachio production seminars, a keynote presentation from Dr. Oz to the powerful networking opportunities attendees enjoyed. The American Pistachio Growers Annual Conference has grown in popularity year after year and will continue for many years to come.



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LeadOn

American Pistachio Growers LeadOn Program is designed for pistachio industry professionals ready to start their leadership path.

The year-long program takes a multi-faceted approach to leadership development through hands-on training, interactive learning experiences, engagement with key industry players and exposure to the many components of the pistachio industry.

Apply today on our member website, apgpower.org/Leadon or contact American Pistachio Growers at 559-475-0435.



Marketing Communications Report

Alison Nagatani
Marketing Communications Chair



Judy Hirigoyen
Vice President, Global Marketing



2020: A YEAR OF SETBACKS AND BREAKTHROUGHS

Covid-19 affected homes and economies globally in 2020, but it also shone a bright light on health and caused consumers to reconsider how to be well and stay well. Agriculture's sales to food service shifted to retail and online sales as eating at home replaced dining out. Consumers changed their shopping habits, along with their priorities.

Nearly all editorial coverage appearing in publications and broadcast media around the world focused on Covid-19 beginning in February. Conferences were cancelled and APG's team of international advertising and PR professionals in domestic and international markets were sent home to quarantine. APG immediately pivoted on plans for the remainder of the year and adapted all international plans for advertising and marketing communications to meet this unique moment in history with sensitive and educational outreach. ZOOM became a verb.

GAME CHANGER! PISTACHIOS ARE A COMPLETE PROTEIN!

Challenges aside, APG could not have been better positioned for this. On March 3 at the APG Annual Conference, Dr. Mehmet Oz announced the findings that American-grown pistachios are a "complete protein," meaning they contain all nine essential amino acids (Google it!) and join the limited number of other plant-based proteins (like soy, quinoa, chickpeas) as a suitable replacement for meat. In the words of Dr. Oz, "pistachios are like eggs on trees!" In addition, Dr. Oz announced the remarkable findings of three separate studies in Europe that confirmed pistachio extract *in vitro* was found to slow the growth of--and even kill--certain bacteria and viruses, such as Herpes Simplex, the Staph virus, and MRSA. As he was speaking, APG issued the press release announcing the findings globally. Later, Dr. Oz featured a special segment on his popular TV show dedicated to these findings that set pistachios apart from other nuts.

In all, the "Complete Protein" message was viewed 2.3 billion times by consumers in all markets.



THE VIRTUAL HARVEST TOUR & CHEF COOK-ALONG

With more people cooking at home during lockdown, the nut known for its smiling shell came out of it and showed itself as a valuable ingredient. The “American Pistachio Virtual Harvest Tour and Chef Cook-Along” took international food writers and social media influencers along to see how pistachios are harvested with Madera grower, Rich Kreps. Kreps shared his excitement of his first harvest, and he educated on the care that goes into American-grown pistachios. Then, each star chef demonstrated a savory and a sweet dish using pistachios as the key ingredient. Hosted by emcee Billy Harris, the ZOOM events in November were attended by 381 journalists and social media influencers from Germany, France, Spain, Italy, India, China, and the USA. The publicity generated by them through December was viewed 761,267,115 times.



Chef Martin Yan



Billy Harris



Rich Kreps

JESSE LINGARD SCOOOOOORES FOR APG!

APG Ambassador for sports was Manchester United player, Jesse Lingard. APG hosted a virtual press conference with Lingard in several countries for a fun opportunity to talk sports and how he's kept in shape during quarantine. SPOILER ALERT: It involves pistachios. From his home in Manchester, England, Lingard gave one of his most revealing and personal interviews ever, and APG was the beneficiary. In all, 75 journalists participated in the interviews and the resulting publicity was viewed 713,080,505 times in all countries. APG ads and digital videos ran simultaneously featuring one of the most exciting and fun soccer players today.



MORE THAN A BILLION REASONS TO PROMOTE PISTACHIOS

American Pistachio Growers has prepared for this moment. Funding 38 studies that resulted in 47 peer-reviewed articles published in scientific journals has provided a rock-solid foundation for APG's public relations and advertising. And now, with an historic harvest of more than a billion pounds and a global desire for health and wellness, we will meet the moment.



CONSUMPTION AND U.S. SHARE OF MARKET IN PRIORITIZED EXPORT MARKETS 2015-2019

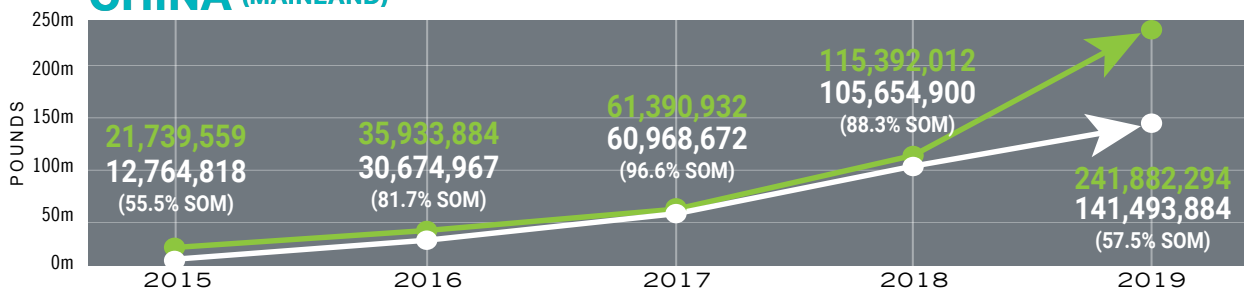
TOTAL CONSUMPTION = (IN-COUNTRY PRODUCTION + IMPORTS) - EXPORTS

KEY

INSHELL HS 080251

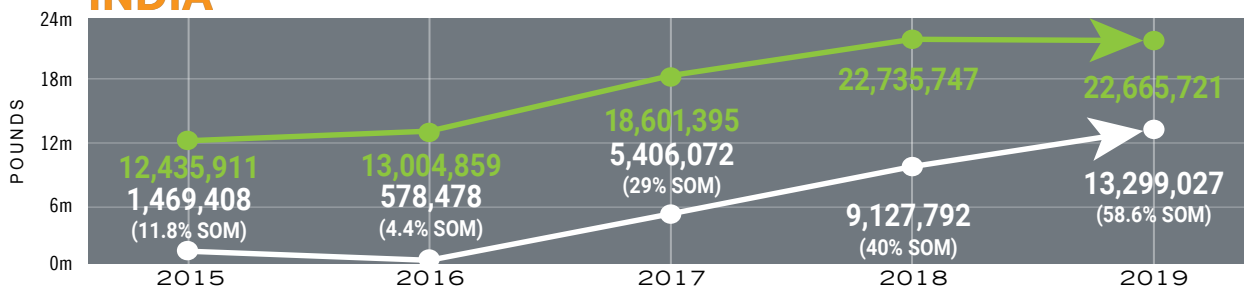
→ TOTAL INSHELL CONSUMPTION (All Origins) → U.S. ORIGIN AND U.S. SHARE OF MARKET

CHINA (MAINLAND)



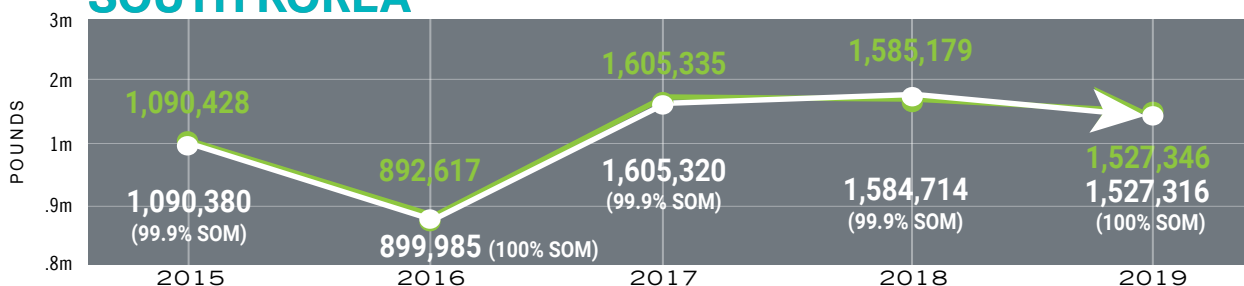
Source: Global Trade Atlas/China Customs March 24, 2020
U.S. Inshell imports for Mainland China and Hong Kong increased by 52% since 2016.
Share of U.S. Inshell imports for Mainland China and Hong Kong increased by 5% since 2016.
Future reports will combine Mainland China and Hong Kong statistics.

INDIA



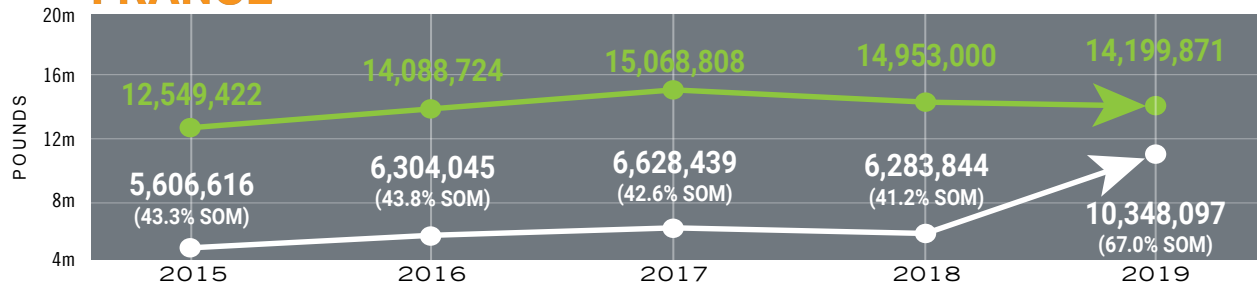
Source: Global Trade Atlas/Ministry of Commerce March 24, 2020

SOUTH KOREA



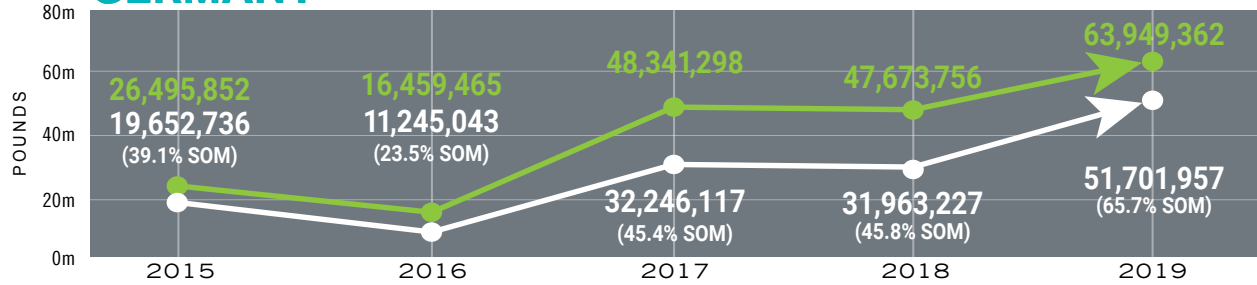
Source: Global Trade Atlas/Korean Customs and Trade Development Institution March 24, 2020
Revised October 23, 2020

FRANCE



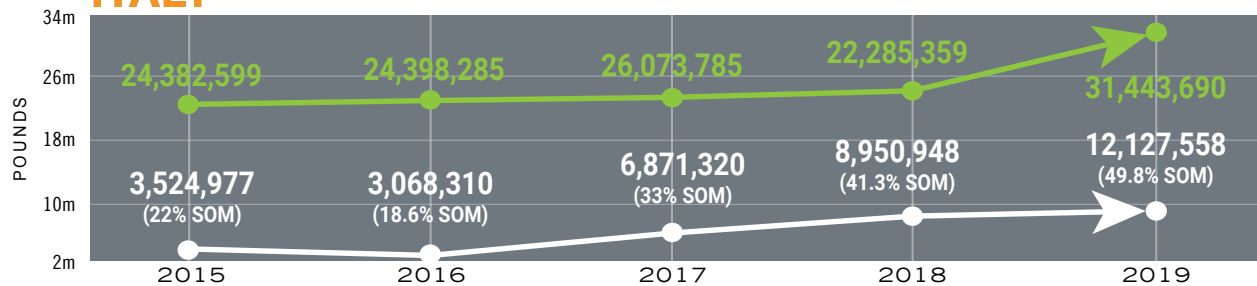
Source: Global Trade Atlas/Eurostat March 24, 2020

GERMANY



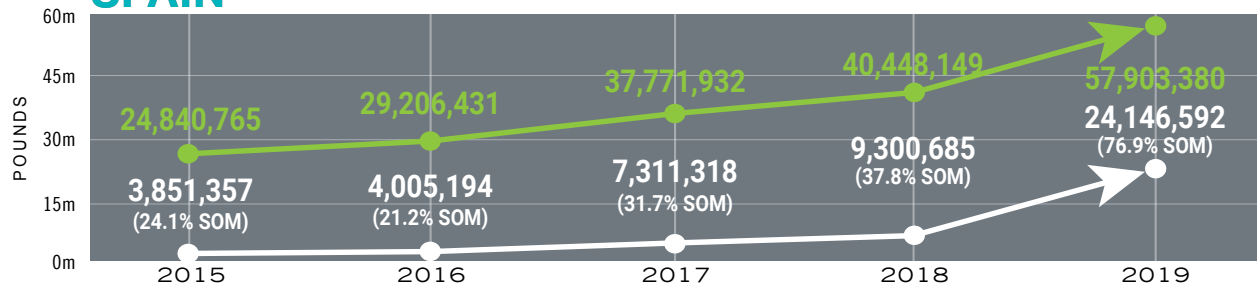
Source: Global Trade Atlas/Eurostat March 24, 2020

ITALY



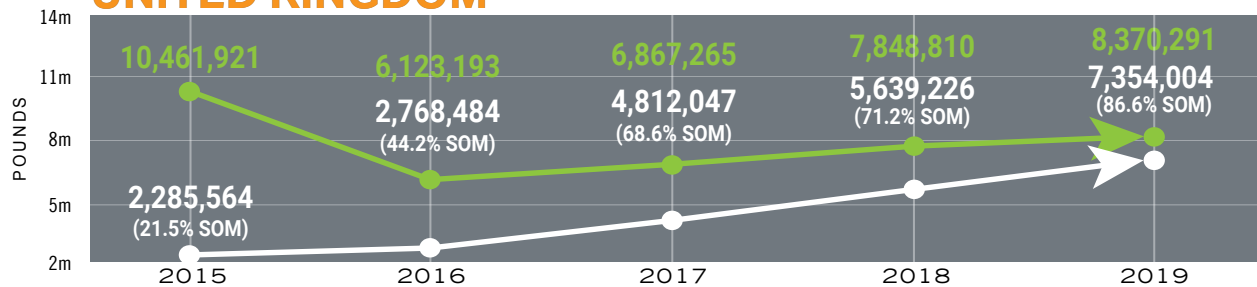
Source: Global Trade Atlas/Eurostat March 24, 2020
Tree Nut Annual European Union Report #E42019-0001 & #E42020-0058

SPAIN



Source: Global Trade Atlas/Eurostat March 24, 2020
Tree Nut Annual European Union Report #E42019-0001 & #E42020-0058

UNITED KINGDOM



Source: Global Trade Atlas/Eurostat March 24, 2020
Revised October 23, 2020

RESULTS BY THE NUMBERS

September 2019 - December 2020

PUBLIC RELATIONS RESULTS

16,277 articles

and radio and television
broadcasts generated specifically
by APG public relations efforts.

\$162 million
Public Relations Advertising
Value Equivalency (AVE)

is the amount APG would have
paid for the articles and television
and radio broadcasts, generated
by their public relations efforts, if
purchased as paid advertising.

19.2
billion views

**of APG publicity
in 9 countries**

(China, South Korea, India,
U.S.A., United Kingdom,
Germany, France, Spain and
Italy).





ADVERTISING RESULTS

2.5 billion
consumers

globally saw the “Power of Pistachios” campaign.

120 million
consumers

clicked through to AmericanPistachios.org
from APG’s digital “Power of Pistachios”
advertisements.

SOCIAL MEDIA RESULTS

125 million
views

of social media posts about APG’s health and
fitness benefits and their culinary versatility on
APG’s social media platforms: Facebook (Global),
Instagram (U.S.A., Germany, Italy, Spain and
France), Twitter and Pinterest (U.S.A.), Weibo and
WeChat (China).

PUBLIC RELATIONS TOP-RANKING STORIES

2.3 billion
consumer
views

of “Complete Protein”
publicity worldwide

Dr. Mehmet Oz announced the findings of a study that showed pistachios are a complete protein at APG’s 2020 Annual Conference in Monterey. He also shared the results of recent antiviral/antimicrobial studies that showed pistachio extract helped stop the growth of bacteria and virus *in vitro*. He later featured the pistachio research on the nationally syndicated *Dr. Oz Show*.

**AMERICAN-GROWN
PISTACHIOS ARE A
COMPLETE
PROTEIN**



1.3 billion views in China

of publicity about American pistachios' health and fitness benefits generated by journalists and influencers during APG's National Fitness promotion. The event included a virtual health and fitness workshop with APG nutrition expert, Dr. Mike Roussell, via Zoom.



805 million views of global publicity and social media

generated by APG's Virtual Harvest Tour and Chef Cook-Along with respected Chefs Wolfgang Puck, Nancy Silverton, Gerald Hirigoyen and Martin Yan, and APG grower Richard Kreps.



HERE ARE THE TOP STORIES AROUND THE GLOBE

GLOBAL

713 million views

of publicity generated by APG's virtual press conference with athlete ambassador, Jesse Lingard, professional British soccer player in the U.S. and EU.



INDIA

637 million views

of articles and blogs about American pistachios as a complete protein generated by APG's Virtual Nutrition Workshop with nutrition expert, author and *Men's Health* nutrition advisor, Dr. Mike Roussell.



CHINA

300 million views

of publicity in China about APG's Fitness Camps, conducted in Beijing and Chengdu.



GERMANY

KLASSIK Radio's *Healthy Hour* interview with APG nutrition expert, Dr. Wiebke Elsner, who broadcasted American pistachios' health and fitness message. The interview was heard more than

16.2 million times



6 million views

of the *Hamburg 1 Morning Show Frühcafé* series of interviews with APG nutrition expert, Dr. Wiebke Elsner.



ITALY

80 million views

of articles about APG's holiday DIY gift idea, "Aperitif Christmas Kit," created by Italy's famous food blogger/influencer Lidia Forlivesi of @Nonsolofood.



73 million views

of *Men's Health* magazine's "Super Food in A Nutshell," a supplement sponsored by APG. The guide, featured on *Men's Health* website's home page, includes information regarding the benefits of complete protein in pistachios for active lifestyles, as well as nutritional values, health benefits, and healthy recipes.



La Cucina Italiana, Italy's popular food magazine, featured the "Pistachios: a Complete Protein" series of Instagram Live interviews, with nutrition expert Sara Cordara, which were viewed more than

2.2 million times



SOUTH KOREA

Health Chosen, South Korea's most popular national daily newspaper, broadcasted a live-stream nutrition talk show, via YouTube, about American pistachios being a complete protein snack for athletes. It was viewed more than

1.3 million times



SPAIN

31 million views

of publicity generated by APG's press conference with athlete ambassador, professional soccer player, Vicky Losada and APG's nutrition expert, Dr. Nieves Palacios. Vicky Losada currently captains FC Barcelona in Spain's Primera División, and she is a member of the Spanish national team.



7 million views

of articles, and television broadcasts, generated by APG's video news releases with PREDIMED Director Ramon Estruch, PhD, who introduced the complete protein research to the Spanish Media.



U.S.A.

Articles and television and radio broadcasts generated by APG's virtual satellite media interviews and video news release about research proving pistachios are a complete protein with nutrition expert, Dr. Mike Roussell, were viewed or heard more than

165 million times



694 million views

resulted from APG's complete protein video news release broadcasted on television news programs, news websites and podcasts.



1.6 million views

of The Dr. Oz Show segment featuring the research findings that pistachios are a complete protein.

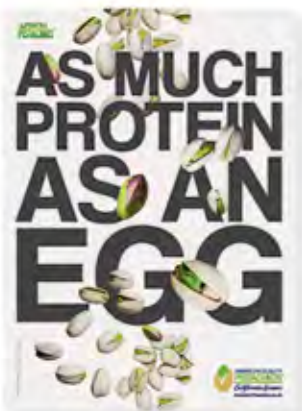


ADVERTISING

PRINT, DIGITAL & TELEVISION

Full-page ads appeared in health, fitness and lifestyle publications, and for the first time, television commercials aired in the U.S., Europe, China and India.





**GAME CHANGER
PISTACHIOS
ARE A COMPLETE
PROTEIN**

Roasted American-grown pistachios are a source of protein that contain all nine of the essential amino acids in adequate amounts for persons over five years of age, as shown by the Protein Digestibility Corrected Amino Acid Score (PDCAAS), and are therefore, a complete protein for that age group.
AmericanPistachios.org/complete

**AMERICAN QUALITY
PISTACHIOS®**
AmericanPistachios.org

NUTRITION CONFERENCES & SEMINARS

German Association for Nutrition and Dietetics (VFED)

September 2019 – Aachen, Germany

Federation of the European Nutrition Societies

October 2019 – Dublin, Ireland

Italian Association of Dietetics and Clinical Nutrition (ADI)

October 2019 – Rome, Italy

“Ernährungs umschau” Sport Nutrition Conference

October 2019 – Frankfurt, Germany

European Federation of Dietetic Associations (EFAD)

November 2019 – Berlin, Germany

Beijing Chronic Disease Nutrition Treatment Forum -

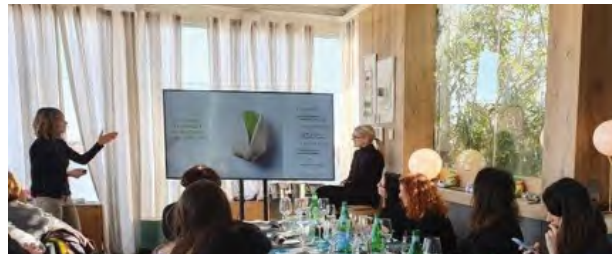
The 13th World Diabetes Day Anti-Diabetic Mobilization

November 2019 - Beijing, China

**“Ernährungs umschau”
Sport Nutrition
Conference, Germany**



**Italian Association of Dietetics
and Clinical Nutrition (ADI), Italy**



**Over 2,100 participated in
APG's sponsored Today's
Dietitian Continuing Education
Webinar "The Ethics of
Hunger," U.S.A.**





The 5th Guangzhou International Symposium of Nutrition and Health
November 2019 - Guangzhou, China



Dietecom – Practical Nutrition Days, France

Italian Society of Human Nutrition (SINU)
November 2019 – Genoa, Italy

Dietecom – Practical Nutrition Days
March 2020 – Paris, France

Virtual Today's Dietitian Conference
May 2020 – U.S.A.

Virtual SPAZIO Nutrition Conference
September 2020 - Italy

2020 Annual Meeting of Chinese Medical Doctor Association
November 2020 - Shijiazhuang, China

2020 Annual Academic Conference of Guangdong Nutrition Society
November 2020 - Guangzhou, China



International Symposium on Nutrition and Health and Media Event, China



NUTRITION

29 experts build credibility for APG



Becci Twombley
CSSD, RD
U.S.A.



Bryan Snyder
RD
U.S.A.



Dr. Mike Roussell
U.S.A.



Mary Jo Feeney
MS, RDN, FADA,
FAND
U.S.A.



Dr. Arianna Carughi
U.S.A.



Dr. Zhaoping Li
U.S.A.



Joey Blake RD
U.S.A.



Sherene Chou
MS, RD
U.S.A.



Jordan Mazur
MS, RD
U.S.A.



Scott Sehnert
MS, RD, CSCS, CSSD
U.S.A.



Dr. Wiebke Elsner
Germany



Dr. Matthias Riedl
Germany



Dr. Ursula Manunzio
Germany



Dr. France Bellisle
France



Nigel Mitchell
BSc, MSc, RD
U.K.



Jeannette Higgs
BSc, RD
EU



Dr. Nieves Palacios
Spain



Dr. Monica Bullo
Spain



Dr. Giorgio Donegani
Italy



Martina Donegani
RDN
Italy



Dr. Sheng Ge
China



Dr. H.K. Chopra
Spain



Kavita Devgan
Nutritionist
Spain



Naini Setalvad
Nutritionist
Spain



Pooja Makhija
MS, RD
Spain



Rashmi Cherian
MS, RD
Spain



Vaibhav Garg
Clinical
Nutritionist
Spain



Wahida Karmally
PhD, RD, CDE,
CLS, FNLA
Spain



Shiny Chandran
MS, RD
Spain



18,870 health professionals

in 23 countries subscribe to APG's quarterly nutrition e-newsletter.



NUTRITION RESEARCH

American Pistachio Growers has funded 34 studies resulting in 47 peer reviewed articles published in scientific journals

Protein Analysis
1 study and 1 publication

Antioxidants
7 Studies and 10 publications

Diabetes and Metabolic Syndrome
9 studies and 10 publications

Heart Health
2 studies and 11 publications

Weight Management and Satiety
6 studies and 7 publications

Microbiota
1 study and 1 publication

Antimicrobial Benefits
3 studies and 3 publications

Postexercise Recovery
1 study and 1 publication

Review of Multiple Studies on the Health Benefits
4 review and 3 publications

GAME CHANGER

PISTACHIOS ARE A COMPLETE PROTEIN!

Pistachios join quinoa and soy as substitute for animal proteins.

Bailey, Hannah M., and Hans H. Stein. "Raw and Roasted Pistachio Nuts (*Pistacia Vera* L) Are 'Good' Sources of Protein Based on Their Digestible Indispensable Amino Acid Score (DIAAS) as Determined in Pigs." *Journal of the Science of Food and Agriculture*, Apr. 2020, doi:10.1002/jsfa.10429.

INTRODUCTION

Researchers assessed the protein quality of pistachios. Results of this analysis would permit the use of "A good source of protein" claim on packages of pistachios, meeting food labeling laws required by the Food and Drug Administration. The study also determined the profile of essential amino acids in pistachios, the building blocks of protein that have to be obtained from food, and their digestibility. Adequate amounts of essential amino acids required to sustain health need to be present to meet the threshold of being a complete protein for those 5 years and over.

ABOUT THE STUDY

Two analytical methods, the Protein Digestibility Corrected Amino Acid Score (PDCAAS) and Digestible Indispensable Amino Acid Score (DIAAS) were conducted to determine protein quality of roasted and raw pistachios. These two methods take into account both the essential amino acid profile and protein digestibility. This was the first study to assess the PDCAAS and DIAAS of pistachios.

Both analyses were conducted as specified by the Food and Agriculture Organization PDCAAS (FAO) Protein Quality Evaluation guidelines. The only difference was that PDCAAS are determined using rats. However, in these experiments pigs were used to determine PDCAAS and DIAAS in the same animal model. The digestive tract of pigs closely resembles that of humans.

PDCAAS was calculated using the recommended reference protein pattern for children from 2 to 5 years of age, and DIAAS was calculated using the recommended reference protein pattern for children older than 3 years, adolescents, and adults, following guidelines by the Food and Agriculture Organization (FAO) of the United Nations. These recommended amounts meet the body's requirement for protein to build and maintain the body structure, support immune function, provide energy and transport nutrients throughout the body.



Sources of complete protein



meat



seafood



eggs



dairy



pistachios

PUBLISHED
APRIL 2020



WHAT THE FINDINGS MEAN

The protein quality of pistachios meets the Food and Drug Administration's requirement for labeling U.S. grown pistachios to bear the claim, "A good source of protein." The amounts of essential amino acids in pistachios also meet the definition of a "complete protein" for ages 5 and above, and now join the ranks of foods like meats, fish, eggs and dairy, and plant proteins such as soy and quinoa. This is important for vegetarians and those moving toward plant-based diets to satisfy their protein requirements.

STUDY SHOWS PISTACHIOS WORK IN A WEIGHT-LOSS PLAN

While previous studies have shown pistachios don't cause weight gain, this study shows they are helpful in a weight-loss diet and lowers blood pressure.

STUDY SHOWS PISTACHIOS MAY BE HELPFUL IN A WEIGHT-LOSS PLAN



Regular pistachio consumption can promote favorable changes in the diet, lower blood pressure, and contribute to weight-loss in a behavioral weight-loss program Rock, Cheryl L., et al. "Effects of Pistachio Consumption in a Behavioral Weight-Loss Intervention on Weight Change, Cardiometabolic Factors, and Dietary Intake." *Nutrients*, vol. 12, no. 7, July 2020, p. 2155, doi:10.3390/nu12072155.

INTRODUCTION

Researchers investigated whether U.S. pistachios could be used as part of a weight-loss program in a study with 100 healthy, overweight and obese individuals.

ABOUT THE STUDY

All participants received general dietary and behavioral weight-loss advice and instruction on increasing their physical activity. Half of the participants included 1.5 ounces of pistachios in their daily diet (Pistachio group) and the other half did not (Control group).

Researchers measured the participants' health information, diet and lab tests for cardiovascular disease risk at the beginning and end of the 4-month study.

Both groups lost about 5 percent of their body weight and both significantly decreased their waist circumference and body mass index (BMI). Waist circumference and BMI are indicators of not only obesity, but whether or not there's risk for diseases such as diabetes and heart disease. In addition to these measurements, there were added benefits to the Pistachio group, including lower systolic and diastolic blood pressure, increased fiber intake and lower consumption of sweets than the Control group. The Pistachio group also had higher blood levels of the antioxidant carotenoids lutein, alpha- and beta-carotene and a healthier ratio of poly- and mono-unsaturated fatty acids to saturated fatty acids.

PUBLISHED
JULY 2020



WHAT THE FINDINGS MEAN

This study adds to the body of evidence that U.S. pistachios can be a component of a weight-loss diet, can increase intake of key nutrients and can promote a healthy dietary pattern. It also strengthens the evidence that pistachios can be beneficial for lowering blood pressure.

PISTACHIO EXTRACT STOPS GROWTH AND KILLS CERTAIN VIRUSES AND BACTERIA

Third of three studies prove pistachios inhibit the growth—and kill—certain common bacteria and viruses, such as MRSA, herpes simplex, staphylococcus aureus, and listeria monocytogenes.



ANTIMICROBIAL EFFECTS OF U.S. PISTACHIO EXTRACTS SHOWN TO PREVENT GROWTH OF BACTERIA AND VIRUSES

Initial findings point to extracts' potential role in the development of novel medical treatments Musarra-Pizzo, Maria, et al. "In Vitro Anti-HSV-1 Activity of Polyphenol-Rich Extracts and Pure Polyphenol Compounds Derived from Pistachios Kernels (*Pistacia Vera* L.)." *Plants* (Basel, Switzerland), vol. 9, no. 2, Feb. 2020, doi:10.3390/plants9020267.

INTRODUCTION

Researchers investigated the activity of polyphenol-rich extracts of pistachio kernels on herpes simplex virus HSV-1 replication. Prior studies showed that polyphenol rich extracts from pistachios had bacteria killing effect on *Listeria monocytogenes*, *Staphylococcus aureus*, and MRSA bacterial strains. *Staphylococcus aureus*, and MRSA are responsible for a range of skin, respiratory and bone joint infections, endocarditis, bacteremia and toxic shock syndrome. According to the researchers, herpes viruses have become a potential risk factor for HIV infection in humans, and there is an increased need to find novel drugs to eradicate HSV infections.

ABOUT THE STUDY

The *in vitro* study infected cell cultures with the HSV-1 virus in a laboratory setting and then treated the cultures with different concentrations of pistachio extracts. The highest concentration of the extract resulted in total reduction of the virus. The findings indicated that polyphenols from pistachios are effective against HSV-1.

PUBLISHED
FEBRUARY 2020



WHAT THE FINDINGS MEAN

Pistachio extracts could be a good candidate for the development of novel topical or oral drug formulations for the treatment of HSV-1 infections, either alone or in combination with standard antiviral therapies. The researchers suggest further investigation should be carried out to study the polyphenols' mechanism of action.

COVID-19 IMPACTS ON U.S. PISTACHIOS

The Covid-19 global pandemic took its toll around the world in economic terms with high unemployment, the disruption of supply chains, and general uncertainty that was reflected in consumer behaviors. But, while shipments of U.S. pistachios took a hit, the impact should be short term with the long-term outlook improving as consumers have become acutely sensitive to health and wellness—and make their food choices accordingly.

CONTRIBUTING ECONOMIC FACTORS

Ongoing tariff disputes, uncertainties around Brexit, and increased competition from Iran, resulting from their pricing, are factors that would affect global business *without* piling on a worldwide pandemic. Yet, compared with other consumer goods and services, pistachios have remained relatively stable, perhaps due to their health benefits, and shelf stability, quality reputation and known reliability of American processors.

The World Trade Organization forecasted significant declines in global GDP and reduced volume of trade (of all kinds), with recovery being dependent on the outcomes of the pandemic. China, however, signaled recovery and the beginnings of a return to normalcy in the fall.

SHIPMENTS LOWER, BUT EXPECT A STRONG RECOVERY

Across export markets, pistachio shipments declined sharply between February and March as supply chains were deeply affected. Congestion at ports caused by labor shortages, a lack of available containers, and border closings in Europe combined for a perfect storm. As the situation eased, shipments improved in the summer. A notable exception was the surge in imports by the United Kingdom as trade anticipated a possible additional duty on January 1 due to Brexit.

Finally in mid-December, one vaccine was approved for use and others followed. This development came as the “dark winter” that was predicted came to pass, and stay-at-home orders were enacted again in several countries. Globally, consumers were hopeful as everyday people would have access to vaccinations by spring.

This table compares exports from April to October, when impacts from Covid-19 were strongly felt (though other circumstances affected shipments, as well).

U.S. Pistachio Exports in Pounds (April through October)

Country	2018	2019*	2020
Hong Kong	37,589,606	55,446,221	10,770,348
China	51,190,204	68,389,470	44,517,648
France	3,583,880	5,183,101	3,690,576
Germany	26,371,144	34,788,826	24,783,271
Italy	4,632,730	6,624,612	4,441,133
Spain	5,120,775	13,995,512	11,765,851
UK	4,705,304	6,012,700	6,275,452
India	4,708,051	8,764,495	950,100
South Korea	704,237	971,880	852,263
Belgium	2,181,555	2,509,947	7,461,178
Canada	10,508,251	10,517,375	10,995,022
Netherlands	8,268,736	6,229,800	3,982,555
Other	44,720,292	65,191,366	41,567,006
Total	204,284,765	284,625,305	172,052,403

Note: Data includes trade ranging from April through October for each year. These months were selected to provide a direct comparison of the impact COVID-19 has had on trade using the available months since the pandemic began to significantly affect trade in April. "Other" countries include all those countries not listed here, based on ACP shipment reports.

Source: Administrative Committee for Pistachios

PISTACHIO CONSUMPTION AND DEMAND DURING COVID-19

Covid-19 created a shift from eating away (at schools/restaurants) to eating almost entirely at home. For many, the stay-at-home orders have provided a “reset” of family habits and more healthful eating patterns.

More than ever, consumers during the pandemic economic crisis are looking for value for their food expenditures, leaning to private labels and not-so-big-brands. American Pistachio Growers positions their product as a complete protein that has value beyond the snack aisle. Without relinquishing the title as “Most favored snack nut,” APG’s research, announced in 2020, showed they can be a replacement for animal protein, unlike most other plant-based proteins.

CONSUMER BEHAVIOR HAS CHANGED, SOME PERMANENTLY. ACCORDING TO A RECENT STUDY OF AMERICANS DURING THE COVID-19 CRISIS (HUNTER 2020)

54%

report cooking more; 46% report baking more

50%

say they’ve become more confident in the kitchen

51%

say they’ll continue to cook more often post-Covid

50%

say they’ve discovered new brands/products; 44% have discovered new ingredients

61%

look for simple solutions

Overall, pistachios as a category have maintained their position when comparing consumption during the same April-August timeframe over the past three years.

3-Year Comparison of Total Consumption During Covid-19 Months (April through August; all countries of origin)

Total Inshell Consumption (All Origins)

Country	2018	2019*	2020
China/Hong Kong	39,017,931	129,948,561	38,930,632
France	5,909,894	6,607,594	5,539,071
Germany	26,133,945	31,740,003	31,127,986
Italy	6,874,872	8,546,365	10,781,652
Spain	10,938,552	14,947,402	11,691,494
UK	2,932,232	4,688,154	3,535,870
India	9,331,073	10,827,692	9,352,649
South Korea	433,085	571,293	376,763
Total	101,571,584	207,877,064	111,336,117

Note: Data includes trade ranging from April through August for each year. These months were selected to provide a direct comparison of the impact COVID-19 has had on consumption using the available months since the pandemic began to significantly affect trade in April.

Source: Global Trade Atlas

Total Kernel Consumption (All Origins)

Country	2018	2019*	2020
Hong Kong	12,539	112,337	444,561
France	1,335,812	800,525	996,394
Germany	5,546,186	5,723,817	5,833,736
Italy	3,438,444	6,200,299	3,132,685
Spain	125,403	248,959	137,442
UK	1,187,934	996,770	700,617
India	3,201,219	5,241,772	3,047,826
South Korea	97,269	134,119	132,911
Total	14,944,806	19,458,598	14,426,172

Note: Data includes trade ranging from April through August for each year. These months were selected to provide a direct comparison of the impact COVID-19 has had on consumption using the available months since the pandemic began to significantly affect trade in April.

Source: Global Trade Atlas

***2019—an “off” year—shows data that should be viewed as exceptional due to lack of Iranian supply and Chinese import surge in anticipation of increased tariffs.**

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 - Salt tolerant
 - Millions sold
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(cv. UCB1-D11) USPP#PP30,913 P2
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 - Over 120% more productive than
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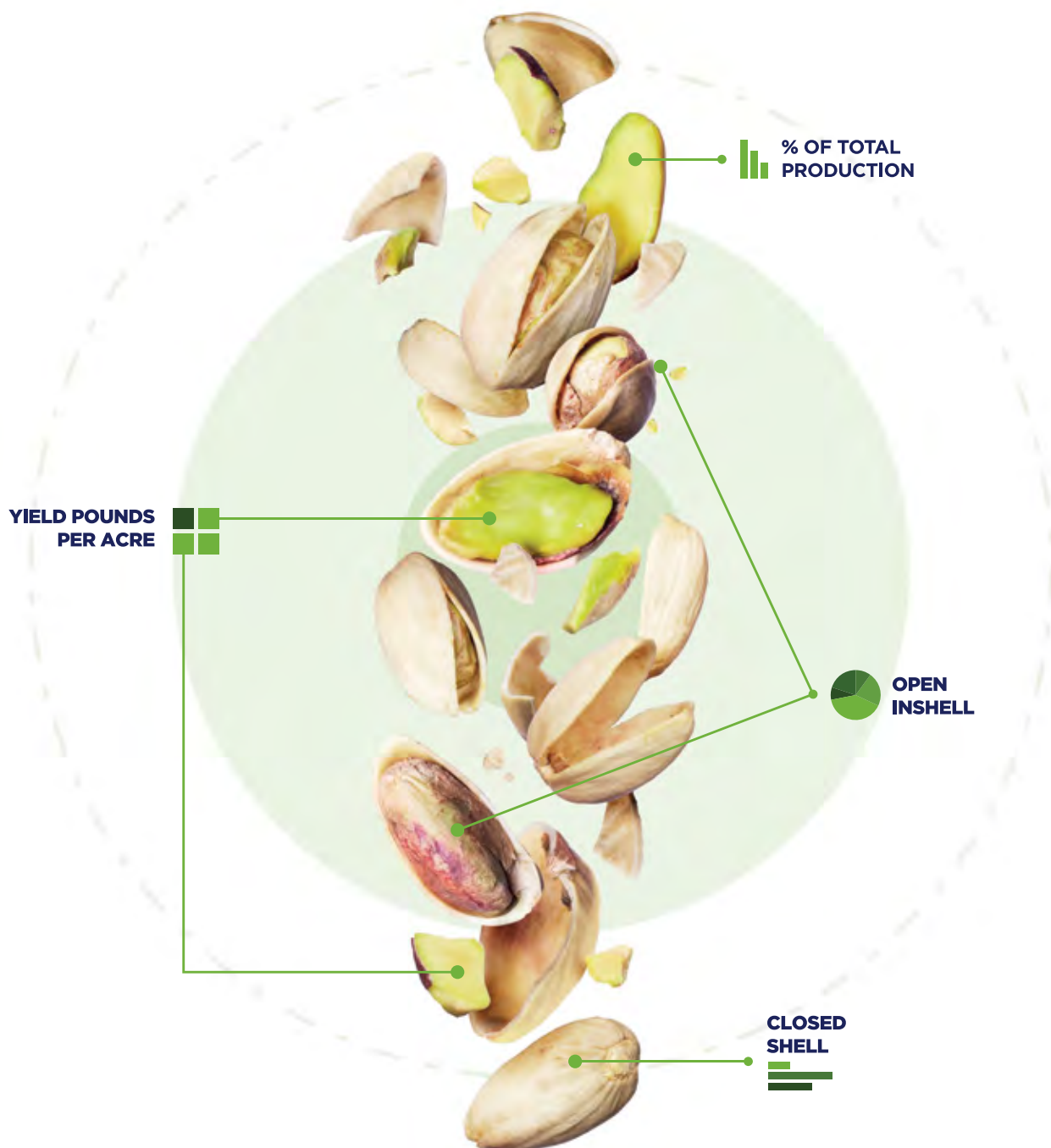
Pending due to COVID-19

FRIENDS DAY 2021

FRIDAY
May 7th
9am-2pm

BY THE NUMBERS

REPORT ON STATISTICS
FOR AMERICAN PISTACHIOS



Total U.S. Pistachio Production



By Year From 1979-1999

YEAR	BEARING ACRES [1]	OPEN INSHELL	CLOSED SHELL	SHELLING STOCK	TOTAL PRODUCTION (POUNDS)	YIELD (POUNDS PER ACRE)
1979	25,440	17,200,000	-	N/A	17,200,000	676
1980	25,773	18,600,000	-	8,600,000	27,200,000	1,055
1981	27,541	10,903,242	-	3,244,633	14,147,875	523
1982	29,902	37,366,499	-	5,848,040	43,214,539	1,468
1983	31,143	20,886,616	-	5,432,540	26,319,156	844
1984	30,788	45,171,125	-	17,467,865	62,638,990	2,027
1985	32,332	22,497,527	-	4,791,268	27,288,795	838
1986	34,243	64,518,438	-	12,175,444	76,693,882	2,240
1987	40,985	29,152,439	-	4,306,135	33,458,574	818
1988	47,234	71,989,599	-	24,412,660	96,402,259	2,117
1989	50,900	33,186,931	-	6,327,550	39,514,481	800
1990	53,700	92,657,459	-	24,637,453	39,514,481	2,375
1991	55,700	58,913,785	-	17,515,762	76,429,547	1,465
1992	56,500	114,320,726	-	32,179,427	146,500,153	2,592
1993	57,000	112,645,883	-	38,261,038	150,906,921	2,648
1994	57,507	94,074,802	-	34,253,213	128,328,015	2,232
1995	60,300	107,342,387	-	40,310,145	147,652,532	2,449
1996	64,300	84,469,382	-	19,854,811	104,324,193	1,622
1997	65,373	136,616,006	-	42,876,464	179,492,470	2,746
1998	68,000	137,644,225	38,644,205	11,198,889	187,487,319	2,757
1999	71,000	104,374,839	12,029,978	5,986,704	122,391,521	1,724

Sources: CPC & ACP Producer Delivery Reports & Acreage Surveys.

[1] Bearing acreage for 1989 to date is defined as plantings six years and older. Bearing acreage prior to 1989 is defined as plantings seven years and older

[2] Arizona & New Mexico data included starting in the 2010/2011 Crop Year

*Prior to 1998 closed shell was included in shelling stock.

Total U.S. Pistachio Production



By Year From 2000-2020

YEAR	BEARING ACRES [1]	OPEN INSHELL	CLOSED SHELL	SHELLING STOCK	TOTAL PRODUCTION (POUNDS)	YIELD (POUNDS PER ACRE)
2000	74,578	188,796,676	38,638,066	14,119,476	241,554,218	3,239
2001	78,000	125,849,554	26,356,995	8,088,733	160,295,282	2,055
2002	83,000	241,664,914	42,096,386	18,673,390	302,434,693	3,644
2003	88,000	89,248,483	22,072,569	6,721,271	118,042,323	1,341
2004	93,000	253,920,610	73,011,946	19,848,932	346,781,488	3,729
2005	104,552	214,575,387	56,858,178	10,951,595	282,385,160	2,701
2006	112,532	200,234,652	25,004,012	12,233,099	237,471,763	2,110
2007	115,007	332,444,535	53,953,597	29,296,761	415,694,893	3,615
2008	118,113	230,547,823	36,538,701	10,903,682	277,990,206	2,353
2009	125,637	289,857,258	48,436,667	16,217,051	354,510,976	2,822
2010	137,102	377,922,848	124,552,672	19,322,518	521,798,038	3,806
2011 [2]	152,944	340,629,631	86,846,692	16,337,730	443,814,053	2,902
2012	177,738	463,303,334	67,233,364	20,447,710	550,984,409	3,100
2013	202,997	378,050,138	69,415,633	21,878,437	469,344,208	2,312
2014	220,527	407,691,332	88,500,092	17,435,248	513,626,672	2,329
2015	232,655	203,538,562	53,607,893	12,950,401	270,096,856	1,161
2016	239,385	666,568,699	169,579,930	60,338,042	896,486,671	3,745
2017	270,010	460,584,779	98,732,689	40,959,856	600,277,324	2,397
2018	302,058	741,650,951	197,014,326	47,990,900	986,656,177	3,736
2019	339,745	575,706,796	132,847,155	31,841,690	740,395,641	2,566
2020	371,386	864,543,877	119,852,892	57,720,457	1,042,117,226	2,806

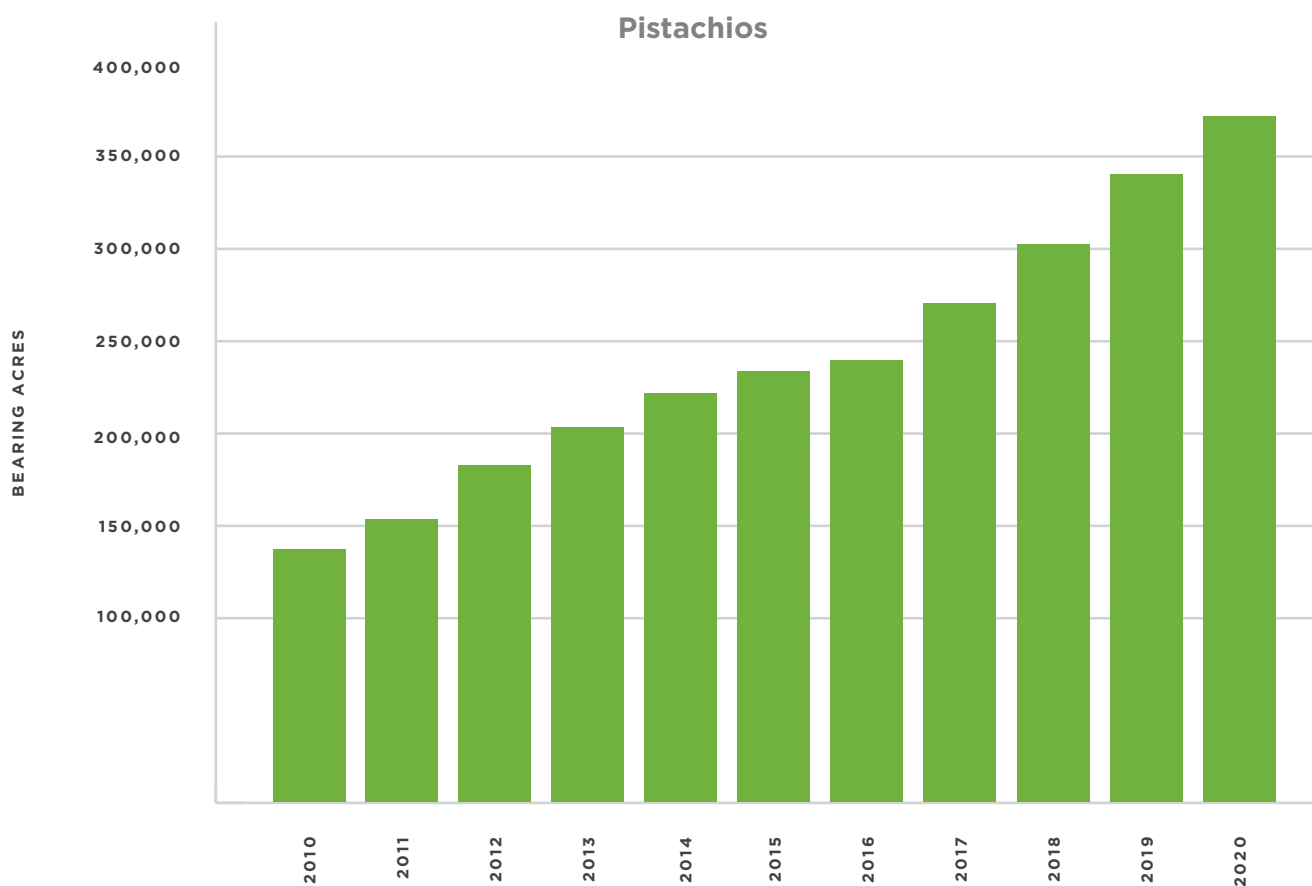
Sources: CPC & ACP Producer Delivery Reports & Acreage Surveys.

[1] Bearing acreage for 1989 to date is defined as plantings six years and older. Bearing acreage prior to 1989 is defined as plantings seven years and older

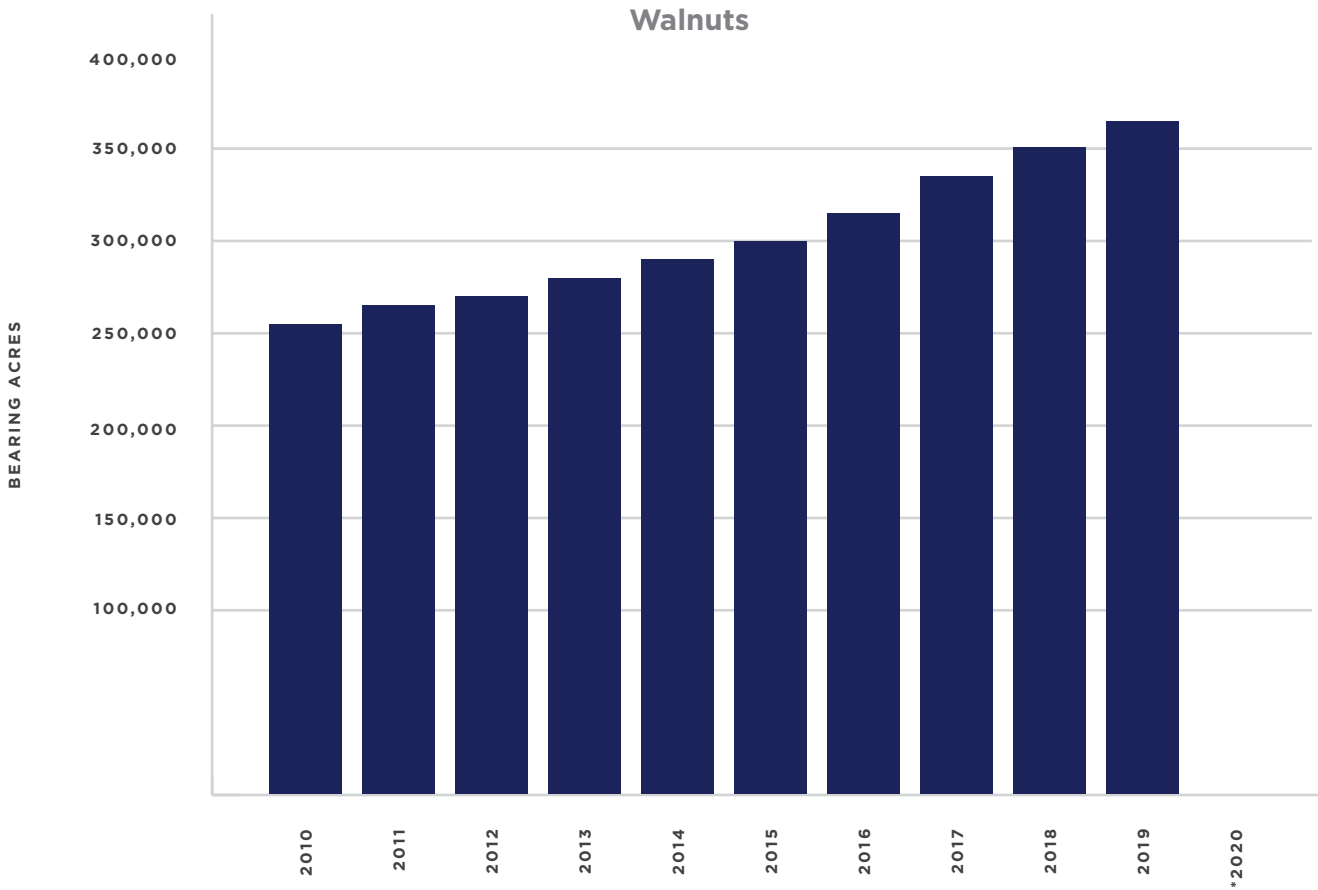
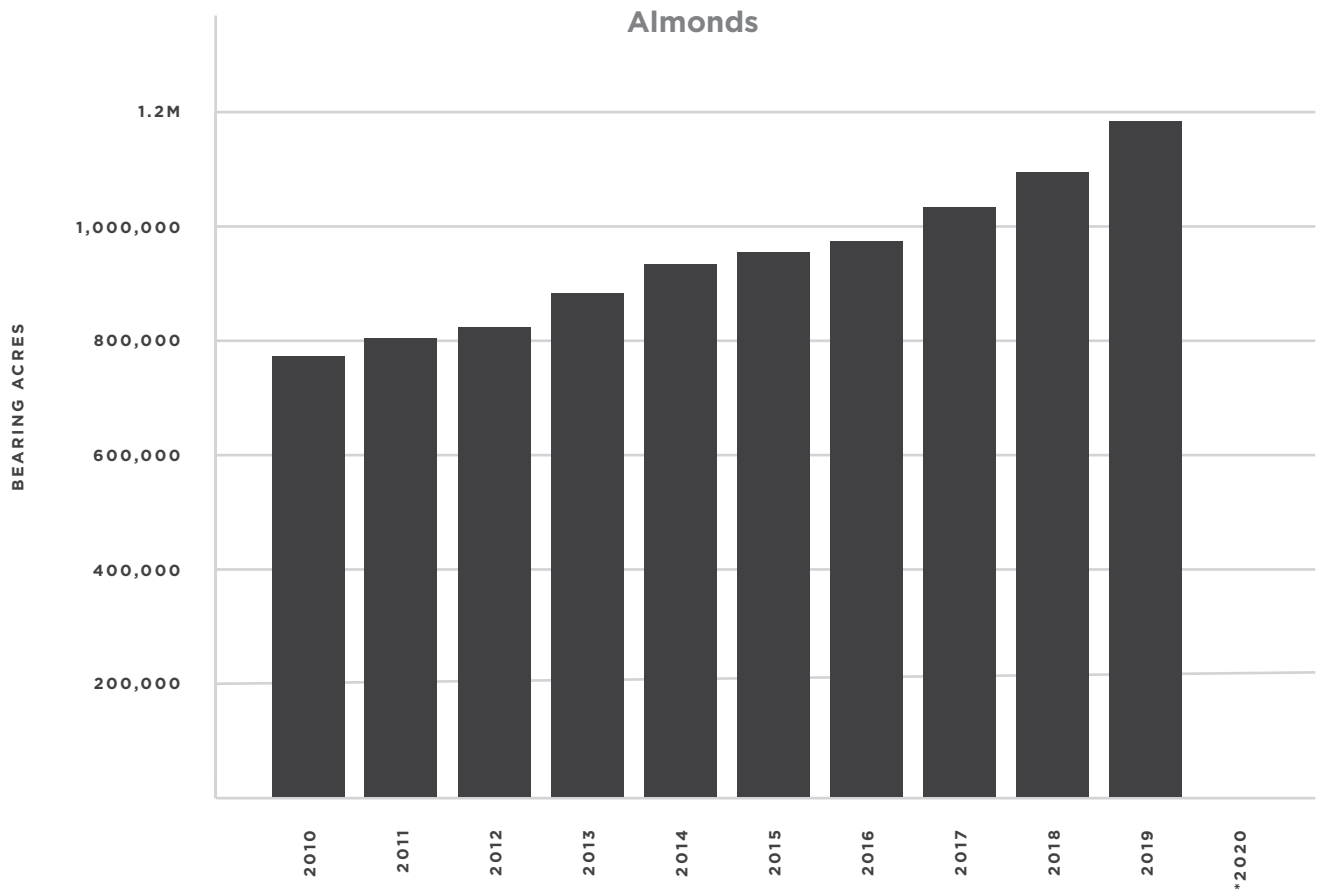
[2] Arizona & New Mexico data included starting in the 2010/2011 Crop Year

*Prior to 1998 closed shell was included in shelling stock.

Tree Nut Acreage Comparison

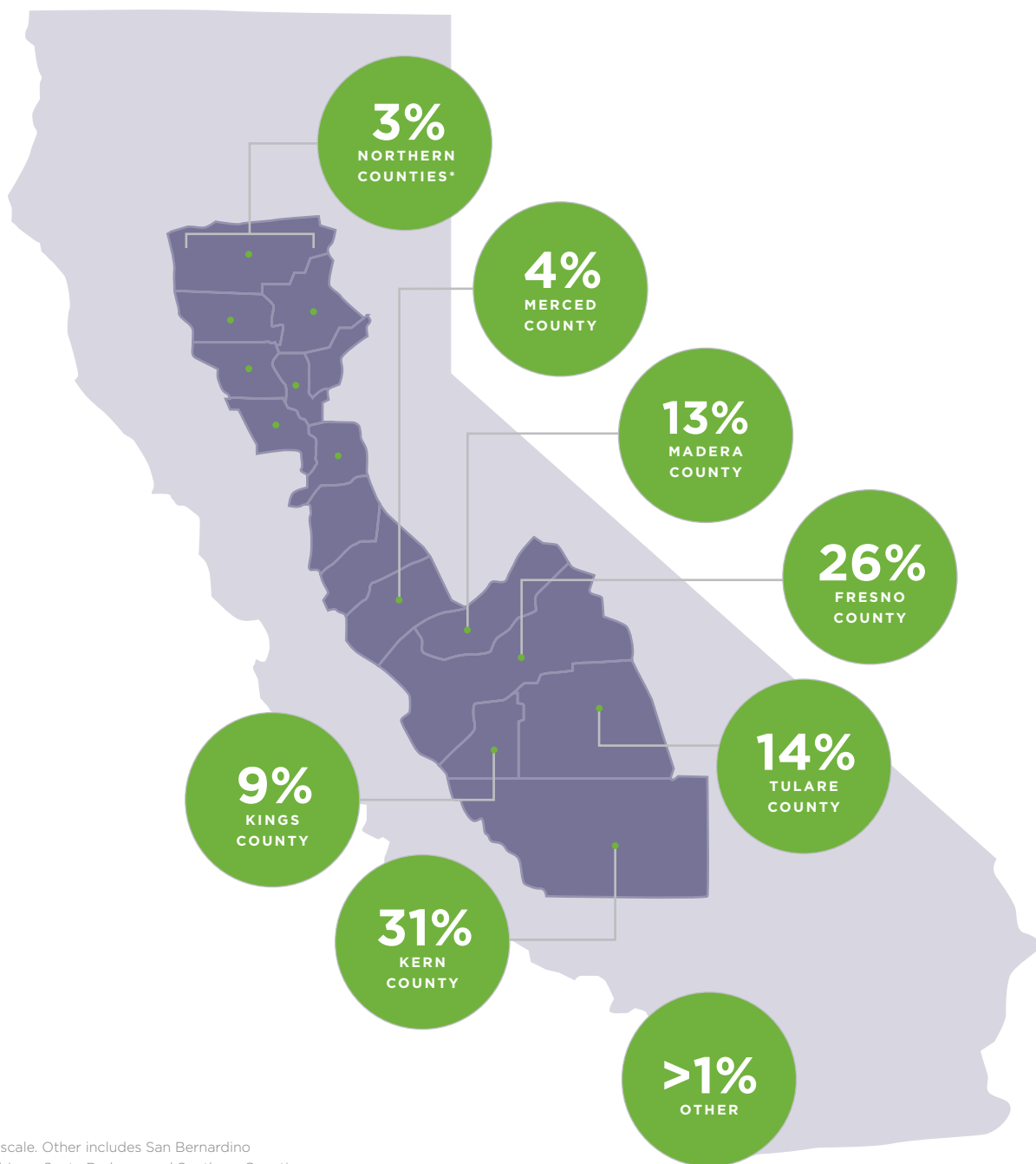


*Almond and Walnut Acreage recorded from USDA reports as of 1/12/21
**2019 Almond and Walnut acreage not available from USDA as of 1/12/21
Bearing acreage information from ACP 2020 Pistachio Statistics report



2020 California Pistachio Production

By District & County



Map not to scale. Other includes San Bernardino, San Luis Obispo, Santa Barbara, and Southern Counties.

*Butte, Colusa, Glenn, Placer, Sacramento, Solano, Sutter, Tehama and Yolo

Bearing Acreage, Production and Yield Per Acre



By District & County - 2019/20 Crop Year

AREA	BEARING ACRES*	OPEN SHELL	CLOSED SHELL	SHELLING STOCK	TOTAL PRODUCTION (POUNDS)	YIELD/ BEARING ACRE (POUNDS)
KERN	113,464	274,497,349	34,574,097	18,651,486	327,722,932	2,888
SAN BERNARDINO ⁽¹⁾	347	158,410	30,318	7,450	196,178	565
SAN LUIS OBISPO	217	809,593	117,403	44,195	971,191	4,476
SANTA BARBARA	718	3,158,735	489,756	122,814	3,771,305	5,253
TULARE	52,962	120,524,717	15,872,024	11,138,658	147,535,399	2,786
FRESNO	97,132	234,104,305	31,681,470	12,437,378	278,223,153	2,864
KINGS	34,525	92,351,232	12,821,582	5,476,505	110,649,319	3,205
MADERA	47,561	99,055,653	16,656,082	6,659,923	122,371,658	2,573
MERCED	14,818	26,899,344	4,440,977	1,819,038	33,159,359	2,238
NORTHERN COUNTIES ⁽²⁾	8,946	12,223,429	2,907,757	1,294,754	16,425,940	1,836
SOUTHERN COUNTIES ⁽³⁾	696	761,110	261,426	68,256	1,090,792	1,567

CALIFORNIA TOTALS	371,386	864,543,877	119,852,892	57,720,457	1,042,117,226	2,806
AZ & NM TOTALS	N/A	6,906,232	681,979	426,917	8,015,128	N/A
TOTAL U.S. CROP		871,450,109	120,534,871	58,147,374	1,050,123,354	

Sources: Administrative Committee for Pistachios Processors' Producer Delivery Reports and Acreage Surveys

(1) Includes Los Angeles and Riverside Counties

(2) Butte, Colusa, Glenn, Placer, Sacramento, Solano, Sutter, Tehama, Yolo

(3) Alameda, Calaveras, Contra Costa, San Joaquin, Stanislaus

* Bearing acreage is defined as plantings six years old.

** Counties with few growers have been combined due to privacy issues, and older.

*** District 4 is Arizona and New Mexico

California Pistachio Production History



By Year From 1979-1999

YEAR	TOTAL PRODUCTION	OPEN INSHELL	% OF TOTAL PRODUCTION	CLOSED SHELL*	% OF TOTAL PRODUCTION	SHELLING STOCK	% OF TOTAL PRODUCTION	YIELD (POUNDS PER ACRE)
1979	17,200,000	17,200,000	-	-	-	N/A	N/A	676
1980	27,200,000	18,600,000	68.40%	-	-	8,600,000	31.60%	1,055
1981	14,147,875	10,903,242	77.10%	-	-	3,244,633	22.90%	523
1982	43,214,539	37,366,499	86.50%	-	-	5,848,040	13.50%	1,468
1983	26,319,156	20,886,616	79.40%	-	-	5,432,540	20.60%	844
1984	62,638,990	45,171,125	72.10%	-	-	17,467,865	27.90%	2,027
1985	27,288,795	22,497,527	82.40%	-	-	4,791,268	17.60%	838
1986	76,693,882	64,518,438	84.10%	-	-	12,175,444	15.90%	2,240
1987	33,458,574	29,152,439	87.10%	-	-	4,306,135	12.90%	818
1988	96,402,259	71,989,599	74.70%	-	-	24,412,660	25.30%	2,117
1989	39,514,481	33,186,931	84.00%	-	-	6,327,550	16.00%	800
1990	117,294,912	92,657,459	79.00%	-	-	24,637,453	21.00%	2,375
1991	76,429,547	58,913,785	77.10%	-	-	17,515,762	22.90%	1,465
1992	146,500,153	114,320,726	78.00%	-	-	32,179,427	22.00%	2,592
1993	150,906,921	112,645,883	74.70%	-	-	38,261,038	25.30%	2,648
1994	128,328,015	94,074,802	73.30%	-	-	34,253,213	26.70%	2,232
1995	147,652,532	107,342,387	72.70%	-	-	40,310,145	27.30%	2,449
1996	104,324,193	84,469,382	81.00%	-	-	19,854,811	19.00%	1,622
1997	179,492,470	136,616,006	76.10%	-	-	42,876,464	23.90%	2,746
1998	187,487,319	137,644,225	73.40%	38,644,205	20.6%	11,198,889	6.00%	2,757
1999	122,391,521	104,374,839	85.30%	12,029,978	9.8%	5,986,704	4.90%	1,724

1979 - 2006: California Pistachio Commission Processors' Producer Delivery Reports and Acreage Surveys.

2007 - Present: Administrative Committee for Pistachios Processors' Producer Delivery Reports and Acreage Surveys.

*Prior to 1998 closed shell was included in shelling stock.

California Pistachio Production History



By Year From 2000-2020

YEAR	TOTAL PRODUCTION	OPEN INSHELL	% OF TOTAL PRODUCTION	CLOSED SHELL*	% OF TOTAL PRODUCTION	SHELLING STOCK	% OF TOTAL PRODUCTION	YIELD (POUNDS PER ACRE)
2000	241,554,218	188,796,676	78.20%	38,638,066	16.0%	14,119,476	5.80%	3,239
2001	160,295,282	125,849,554	78.50%	26,356,995	16.4%	8,088,733	5.10%	2,055
2002	302,434,693	241,664,914	79.90%	42,096,386	13.9%	18,673,390	6.20%	3,644
2003	118,042,323	89,248,483	75.60%	22,072,569	18.7%	6,721,271	5.70%	1,341
2004	346,781,488	253,920,610	73.20%	73,011,946	21.1%	19,848,932	5.70%	3,729
2005	282,385,160	214,575,387	76.00%	56,858,178	20.1%	10,951,595	3.90%	2,701
2006	237,471,763	200,234,652	84.30%	25,004,012	10.5%	12,233,099	5.20%	2,111
2007	415,694,893	332,444,535	79.97%	53,953,597	13.0%	29,296,761	7.05%	3,615
2008	277,990,206	230,547,823	82.93%	36,538,701	13.1%	10,903,682	3.92%	2,353
2009	354,510,976	289,857,258	81.76%	48,436,667	13.7%	16,217,051	4.57%	2,822
2010	521,798,038	377,922,848	72.43%	124,552,672	23.9%	19,322,518	3.70%	3,806
2011	443,814,053	340,629,631	76.75%	86,846,692	19.6%	16,337,730	3.68%	2,902
2012	550,984,409	463,303,334	84.09%	67,233,364	12.2%	20,447,710	3.71%	3,100
2013	469,344,208	378,050,138	80.55%	69,415,633	14.8%	21,878,437	4.66%	2,312
2014	513,626,672	407,691,332	79.38%	88,500,092	17.2%	17,435,248	3.39%	2,329
2015	270,096,856	203,538,562	75.36%	53,607,893	19.8%	12,950,401	4.79%	1,161
2016	896,486,671	666,568,699	74.35%	169,579,930	18.9%	60,338,042	6.73%	3,745
2017	600,277,324	460,584,779	76.73%	98,732,689	16.4%	40,959,856	6.82%	2,397
2018	986,656,177	741,650,951	75.17%	197,014,326	20.0%	47,990,900	4.86%	3,736
2019	740,395,641	575,706,796	77.86%	132,847,155	17.9%	31,841,690	4.39%	2,566
2020	1,042,117,226	864,543,877	82.96%	119,852,892	11.5%	57,720,457	5.53%	2,806

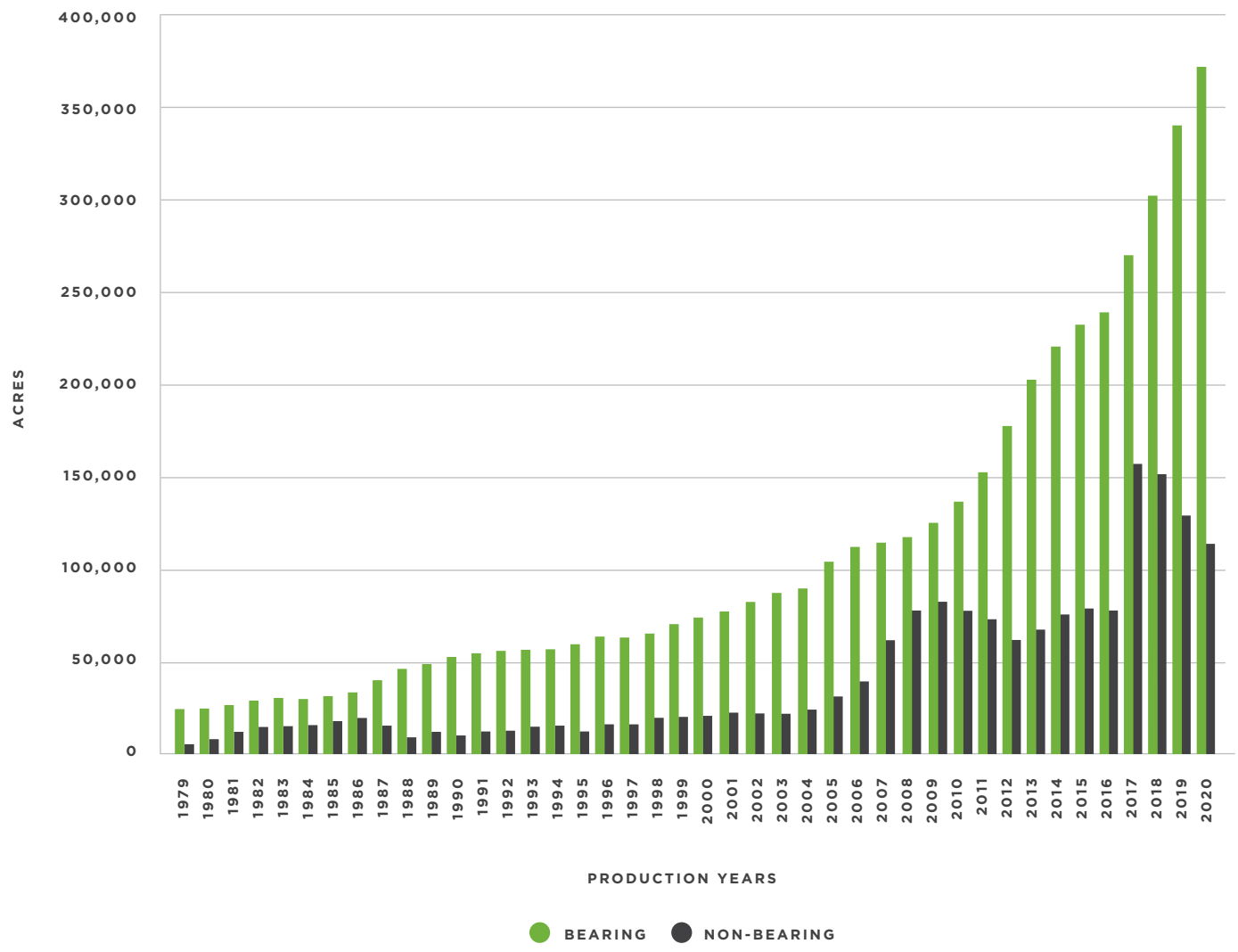
1979 - 2006: California Pistachio Commission Processors' Producer Delivery Reports and Acreage Surveys.

2007 - Present: Administrative Committee for Pistachios Processors' Producer Delivery Reports and Acreage Surveys.

*Prior to 1998 closed shell was included in shelling stock.

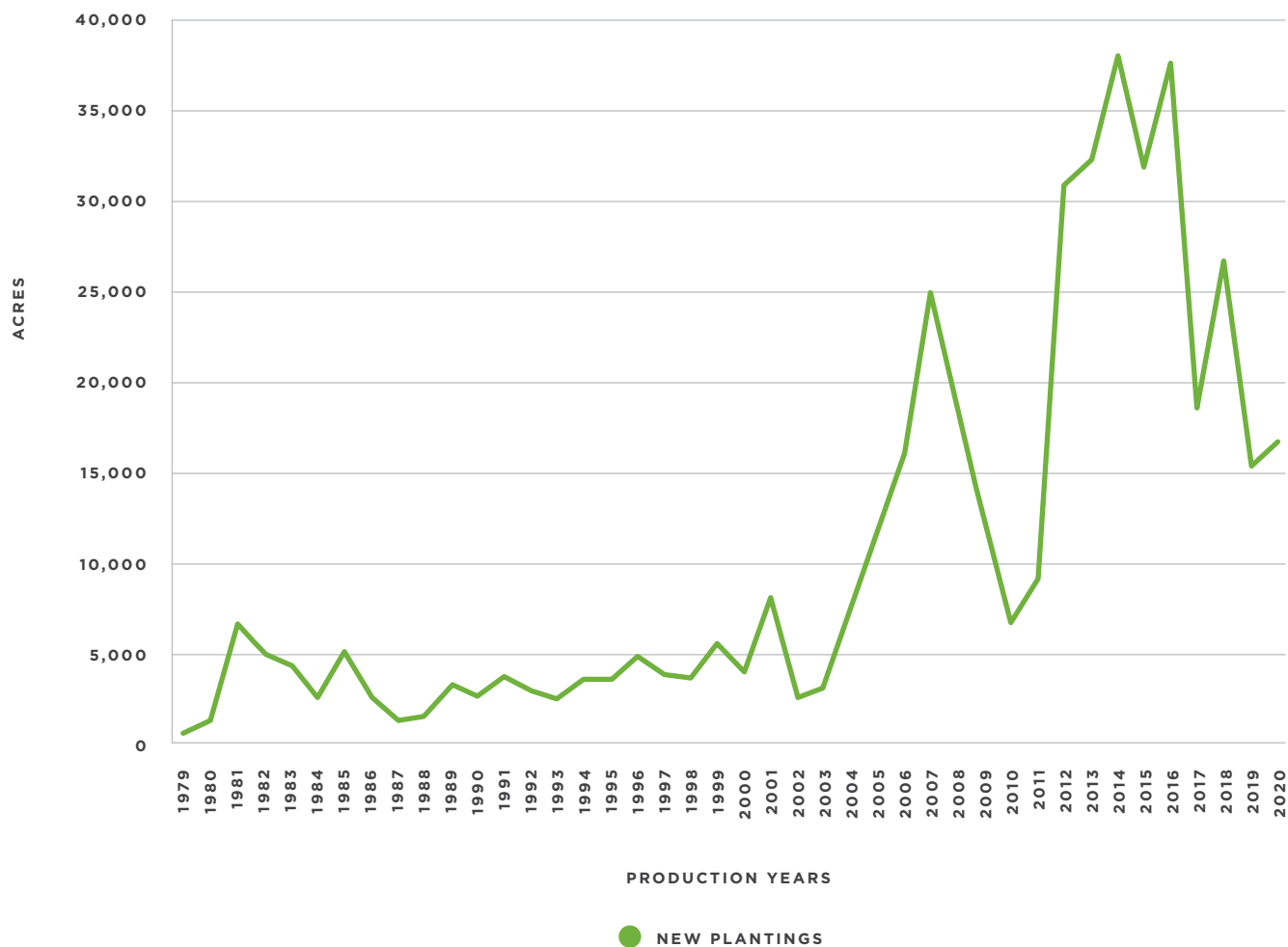
California Pistachio Bearing vs Non-Bearing

In Acres From 1979-2020



California Pistachio New Plantings

In Acres From 1979-2020



Sources: CPC, ACP
and CASS/NASS
statistical data

California Pistachio Acreage & Crop Value



By Year From 1979-1999

	ACREAGE				YIELD		CROP VALUE		
YEAR	BEARING	NON-BEARING	TOTAL	NEW PLANTINGS	BEARING YIELD/ACRE	PRODUCTION (MILLION POUNDS)	AVG RETURN/ POUND [1]	TOTAL VALUE (MILLION \$)	VALUE/ BEARING ACRE
1979	25,440	6,211	31,651	666	676	17.2	1.60	27.50	1,081
1980	25,773	8,989	34,762	1,382	1,055	27.2	2.05	55.80	2,165
1981	27,541	13,084	40,625	6,494	523	14.4	1.36	19.60	712
1982	29,902	15,619	45,521	5,002	1,468	43.9	1.49	63.70	2,130
1983	31,143	15,959	47,102	4,349	844	26.3	1.41	37.30	1,198
1984	30,788	16,794	47,582	2,488	2,027	63.0	0.98	61.70	2,004
1985	32,332	18,739	51,071	5,126	838	27.1	1.37	36.60	1,132
1986	34,243	20,438	54,681	2,579	2,240	76.7	1.12	85.90	2,509
1987	40,985	16,365	57,350	1,266	818	33.0	1.37	47.20	1,152
1988	47,234	10,258	57,492	1,461	2,117	93.4	1.22	109.30	2,314
1989	50,900	12,000	62,900	3,209 [2]	800	38.8	1.63	63.20	1,242
1990	53,700	11,100	64,800	2,655	2,375	119.9	1.02	129.50	2,412
1991	55,700	13,300	69,000	3,686	1,465	76.3	1.25	100.70	1,808
1992	56,500	13,900	70,400	2,894	2,592	146.5	1.03	150.90	2,671
1993	57,000	15,700	72,700	2,480	2,648	150.9	1.07	161.50	2,833
1994	57,507	16,633	74,140	3,568	2,232	128.3	0.92	118.10	2,054
1995	60,300	13,400	73,700	3,413	2,449	147.7	1.09	160.94	2,669
1996	64,300	17,100	81,400	4,872	1,622	104.3	1.16	120.99	1,882
1997	65,373	17,062	82,435	3,839	2,746	179.5	1.13	202.84	3,103
1998	68,000	19,300	87,300	3,620	2,757	187.5	1.03	193.10	2,840
1999	71,000	21,000	92,000	5,496	1,724	122.4	1.33	162.78	2,293

Sources: CPC, ACP and CASS/NASS statistical data

*Approximate numbers due to uncertainties of removal and replanting.

California Pistachio Acreage & Crop Value



By Year From 2000-2020

	ACREAGE				YIELD		CROP VALUE		
YEAR	BEARING	NON-BEARING	TOTAL	NEW PLANTINGS	BEARING YIELD/ACRE	PRODUCTION (MILLION POUNDS)	AVG RETURN/ POUND [1]	TOTAL VALUE (MILLION \$)	VALUE/ BEARING ACRE
2000	74,578	21,730	96,308	3,903	3,239	241.6	1.01	244.02	3,272
2001	78,000	23,500	101,500	8,025	2,055	160.3	1.01	161.90	2,076
2002	83,000	23,000	106,000	2,475	3,644	302.4	1.10	332.64	4,008
2003	88,000	23,000	111,000	3,016	1,341	118.0	1.22	143.96	1,636
2004	93,000	24,733	117,733	7,314	3,729	346.8	1.34	464.71	4,997
2005	104,552	32,295	136,847	11,465	2,701	282.4	2.05	578.92	5,537
2006	112,532	40,112	152,644	15,842	2,110	237.5	1.89	448.88	3,989
2007	115,007	62,341	177,348	24,794	3,615	415.7	1.41	586.14	5,097
2008	118,133	78,155	196,288	18,740	2,353	278.0	2.05	569.90	4,824
2009	125,637	82,969	208,606	12,128	2,822	354.5	1.67	592.02	4,712
2010	137,102	78,234	215,336	6,730 [2]	3,806	521.8	2.22	1,158.40	8,449
2011	152,944	73,392	226,336	9,017 [2]	2,902	443.8	1.98	878.72	5,745
2012	177,738	62,308	240,046	30,625 [2]	3,100	551.0	2.61	1,438.11	8,091
2013	202,997	68,068	271,065	32,048	2,312	469.3	3.48	1,633.16	8,045
2014	220,527	75,940	294,467	37,687	2,329	513.6	3.57	1,833.55	8,314
2015	232,655	79,210	311,865	31,641	1,161	270.1	3.29	888.63	3,820
2016	239,385	78,210	317,595	37,380	3,745	896.5	1.68	1,506.12	6,292
2017	270,010	157,169	427,179	18,413	2,220 [4]	600.3	1.69	1,014.51	3,757
2018	302,058	151,683	453,741	26,562	3,262	986.7	2.65	2,614.76	8,656
2019	339,745	129,226	468,971	15,230	2,177	740.4	2.62	1,939.85	5,710
2020	371,386	114,121	485,507	16,536	2,806	1,042.1	AVERAGE RETURN UNAVAILABLE		

Sources: CPC, ACP Land IQ Reports, and CASS/NASS statistical data

1Weighted average which includes shelling stock. NASS periodically revises these numbers.

2Based on Land IQ Bearing/Non-Bearing Acreage data (with adjustments in 2011/2012)

3Based on Land IQ bearing/Non-Bearing Acreage Reports for 2017 and forward. Yield has changed from previously reported statistics.

4Previously reported as: 2017 - 2,397; 2018 - 3,736; 2019 - 2,566

5NASS suspended data collection in 2016-2017. The average return per pound for these two years have not been updated and are likely erroneous.

Open Inshell Shipments/ Inventory Carryover History

By Year From 1985-2005

YEAR	NEW CROP (OPEN INSHELL)	INVENTORY ADJUSTMENTS	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS	TOTAL SHIPMENTS	INVENTORY CARRYOUT/ CARRYIN
1985/86	22,497,527	638,935	36,173,788	23,517,699	1,594,195	25,111,894	11,061,894
1986/87	64,518,438	(8,791,131)	66,789,201	37,271,746	3,754,449	41,026,195	25,763,006
1987/88	29,152,439	(1,800,790)	53,114,655	40,276,878	6,266,497	46,543,375	6,571,280
1988/89	71,989,599	4,112,916	82,673,795	48,158,964	11,190,380	59,349,344	23,324,451
1989/90	33,186,931	(3,202,786)	53,308,596	35,311,575	5,753,338	41,064,913	12,243,683
1990/91	92,657,459	2,523,709	107,424,851	63,387,571	16,113,721	79,501,292	27,923,559
1991/92	58,913,785	6,647,377	93,484,721	59,662,021	25,921,087	85,583,108	7,901,613
1992/93	114,320,726	10,897,159	133,119,498	76,037,890	34,635,897	110,673,787	22,445,711
1993/94	112,645,883	3,571,570	138,663,164	69,590,108	32,555,293	102,145,401	36,517,763
1994/95	94,074,802	9,028,163	139,620,728	80,314,468	36,071,219	116,385,687	23,235,041
1995/96	107,342,387	(1,480,859)	129,096,569	69,740,482	39,330,159	109,070,641	20,025,928
1996/97	84,469,382	1,988,738	106,484,048	58,683,031	33,203,907	91,886,938	14,597,110
1997/98	136,616,006	5,081,231	156,294,347	74,821,240	66,380,564	141,201,804	15,092,543
1998/99	137,644,225	7,873,838	160,610,606	85,112,260	49,995,685	135,107,945	25,502,661
1999/00	104,374,839	(3,392,808)	126,484,692	76,866,274	33,061,606	109,927,880	16,556,812
2000/01	188,793,654	(515,762)	204,834,704	106,683,890	48,008,950	154,692,840	48,409,891
2001/02	125,849,554	(8,249,269)	166,010,176	97,347,328	55,355,787	152,703,115	13,307,061
2002/03	241,656,847	(6,455,957)	248,507,951	97,959,721	63,773,344	161,733,065	86,774,886
2003/04	89,255,589	(3,984,770)	172,045,705	111,929,789	53,169,870	165,099,659	6,946,046
2004/05	253,920,610	(11,043,286)	249,823,370	105,773,078	95,761,666	201,534,744	48,288,626
2005/06	214,575,387	(4,204,583)	258,659,430	85,915,717	82,552,955	168,468,672	90,190,758

[1] Only open inshell is reported as this is the industry standard for determining inventory carryover.

[2] Inventory adjustments include splitting and shelling adjustments as well as inventory adjustments resulting from processing loss and inventory corrections.

[3] Countries of destination may be found in Year End Shipment Reports (www.acpistachios.org/statistics.htm)

[4] District 4 data included starting with the 2010/2011 Crop Year

Open Inshell Shipments/ Inventory Carryover History

By Year From 2006-2020

YEAR	NEW CROP [1] (OPEN INSHELL)	INVENTORY ADJUSTMENT [2]	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS [3]	TOTAL SHIPMENTS	INVENTORY CARRYOUT/ CARRYIN
2006/07	200,234,652	(34,185,741)	256,239,669	87,363,653	97,983,575	185,347,228	70,892,441
2007/08	332,378,075	(26,075,313)	377,563,791	115,787,557	168,995,508	284,783,065	92,780,726
2008/09	230,547,823	(3,125,768)	320,202,781	85,313,225	183,089,493	268,402,718	51,800,063
2009/10	289,857,258	(10,950,254)	330,707,067	114,842,769	192,436,136	307,278,905	23,428,162
2010/11 [4]	381,890,117	(30,363,452)	374,954,827	122,456,770	173,191,437	295,648,207	79,306,620
2011/12	343,786,231	(30,876,217)	392,216,634	153,904,736	200,542,576	354,447,312	37,769,322
2012/13	466,618,504	(34,760,117)	469,627,709	146,797,517	237,746,411	384,543,928	85,083,781
2013/14	382,681,859	(31,379,912)	436,385,728	125,696,820	255,976,908	381,673,728	54,712,000
2014/15	412,063,855	(49,541,570)	417,234,285	116,481,103	194,362,124	310,843,227	106,391,058
2015/16	207,217,512	(34,886,402)	278,722,168	106,066,958	125,698,802	231,765,760	46,956,408
2016/17	671,310,748	(76,994,846)	641,272,310	162,727,388	352,485,698	515,213,086	126,059,224
2017/18	463,815,722	(64,571,025)	525,303,921	169,561,852	323,752,564	493,314,416	31,989,505
2018/19	746,858,150	(82,142,973)	696,704,682	181,444,677	452,819,647	634,264,324	62,440,358
2019/20	582,111,271	(76,294,888)	568,256,741	170,971,201	311,802,984	482,774,185	85,482,556

[1] Only open inshell is reported as this is the industry standard for determining inventory carryover.

[2] Inventory adjustments include splitting and shelling adjustments as well as inventory adjustments resulting from processing loss and inventory corrections.

[3] Countries of destination may be found in Year End Shipment Reports (www.acpistachios.org/statistics.htm)

[4] District 4 data included starting with the 2010/2011 Crop Year





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Blue Ocean Organics

Contact James Watson
Director, Sales & Marketing

jwatson@semios.com
559-614-8993



Pistachio Shipments in Pounds

	OPEN INSHELL				ARTIFICIALLY OPENED			
DOMESTIC	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
SEPT	14,861,852	12,719,759	10,313,269	12,430,928	0	0	0	0
OCT	11,811,249	15,539,704	16,014,289	17,421,634	0	0	0	0
NOV	14,498,615	15,265,216	16,589,570	18,514,845	0	0	0	0
DEC	17,928,510	18,689,882	19,815,842	16,567,337	0	0	0	0
JAN	11,828,371	14,937,005	15,826,754	13,450,115	0	0	0	0
FEB	12,332,255	13,332,443	12,845,046	11,281,145	0	0	0	0
MAR	16,025,721	15,684,645	16,589,612	17,430,252	0	0	0	0
APR	12,829,987	13,654,943	16,145,273	10,926,033	0	0	0	0
MAY	12,301,261	10,878,864	15,472,483	12,919,088	0	0	0	0
JUN	14,543,722	15,614,032	15,384,112	14,536,102	0	0	0	0
JUL	9,428,762	11,191,310	11,985,208	11,667,573	0	0	0	0
AUG	14,337,083	12,054,049	14,463,219	13,826,149	0	0	0	0
TOTAL DOMESTIC	162,727,388	169,561,852	181,444,677	170,971,201	0	0	0	0
SHIPMENTS	31.6%	34.4%	28.6%	35.4%	0.0%	0.0%	0.0%	0.0%
EXPORT	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
SEPT	29,711,910	17,942,013	19,543,899	16,248,842	0	0	0	0
OCT	59,610,944	49,857,922	55,073,857	47,613,315	69,000	0	0	0
NOV	52,939,998	62,969,403	87,553,423	55,317,251	229,250	0	0	0
DEC	24,083,616	38,518,964	30,817,840	21,530,641	65,000	0	0	0
JAN	23,144,368	24,790,542	31,331,306	31,546,884	310,000	0	0	0
FEB	22,308,580	22,626,185	30,745,542	24,208,586	209,250	0	0	0
MAR	26,859,265	28,645,024	47,127,227	28,800,733	28,500	0	0	0
APR	18,909,957	23,944,876	35,788,923	23,766,503	22,000	0	0	0
MAY	18,234,290	16,588,659	28,926,374	17,871,432	0	0	0	0
JUN	23,378,896	19,056,153	28,626,381	17,993,421	0	0	0	0
JUL	22,984,673	14,019,826	29,099,019	13,262,578	0	0	0	0
AUG	30,319,201	4,792,997	28,185,856	13,642,798	0	0	0	0
TOTAL EXPORT	352,485,698	323,752,564	452,819,647	311,802,984	933,000	0	0	0
SHIPMENTS	68.4%	65.6%	71.4%	64.6%	100.0%	0.0%	0.0%	0.0%
YEAR TOTALS	515,213,086	493,314,416	634,264,324	482,774,185	933,000	0	0	0

Source: Administrative Committee for Pistachios Inventory/Shipment Reports. Year ended August 31.

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Pistachio Shipments in Pounds

	CLOSED SHELL				SHELLING STOCK			
DOMESTIC	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
SEPT	263,455	90,985	0	61,385	234,041	239,815	0	135,776
OCT	112,137	217,000	245,205	69,258	83,819	38,000	285,238	198,916
NOV	58,615	220,000	0	102,012	37,479	0	0	0
DEC	99,000	44,000	44,000	2,645	0	0	0	15,340
JAN	-88,000	8,415	0	24,806	0	246,453	0	6,175
FEB	72,759	0	52,998	116,963	197,700	0	0	213,012
MAR	88,000	20,000	44,785	115,721	3,000	196,730	6,126	14,304
APR	70,000	44,000	499,921	176,000	4,400	44,768	77,466	42,000
MAY	132,000	0	47,129	336,594	0	88,000	47,855	51,416
JUN	236,417	44,000	44,801	70,489	42,000	35,450	23,833	60,588
JUL	351,000	0	0	-64,842	2,840	0	62,257	-8,578
AUG	399,900	4,400	0	1,255	0	79,746	0	402
TOTAL DOMESTIC	1,795,283	692,800	978,839	1,012,286	605,279	968,962	502,775	729,351
SHIPMENTS	2.6%	1.1%	1.1%	0.0%	54.1%	15.5%	3.1%	10.5%
EXPORT	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
SEPT	6,325,766	1,971,300	2,639,800	1,625,036	60,539	424,600	2,480,500	792,059
OCT	13,523,343	11,219,015	7,297,351	7,916,320	43,899	0	1,253,883	648,243
NOV	6,316,032	9,858,450	18,935,292	6,882,463	20,206	88,000	1,721,756	55,285
DEC	2,687,926	4,675,935	3,785,391	1,086,000	1,688	44,000	603,018	1,513,000
JAN	4,575,600	1,914,767	2,476,284	2,078,573	44,000	402,222	1,464,965	1,768,000
FEB	6,068,309	3,712,427	4,343,358	2,097,700	21,205	132,000	1,389,040	792,000
MAR	5,040,724	5,810,699	8,338,521	1,320,472	47,324	352,000	1,895,409	421,554
APR	5,224,857	4,768,200	7,267,577	2,645,096	3,521	440,000	614,426	88,022
MAY	4,268,329	3,390,268	5,332,841	1,021,777	45,646	307,091	826,168	4,022
JUN	3,013,258	3,737,635	12,481,645	726,098	49,870	220,000	988,764	78,279
JUL	4,029,250	3,668,287	10,520,940	637,098	0	888,692	931,310	51,993
AUG	5,188,800	5,589,000	7,565,532	615,920	176,000	1,979,850	1,367,910	14,076
TOTAL EXPORT	66,262,194	60,315,983	90,984,532	28,652,553	513,898	5,278,455	15,537,149	6,226,533
SHIPMENTS	97.4%	98.9%	98.9%	0.0%	45.9%	84.5%	96.9%	89.5%
YEAR TOTALS	68,057,477	61,008,783	91,963,371	29,664,839	1,119,177	6,247,417	16,039,924	6,955,884



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Pistachio Shipments in Pounds

	Kernels				Grand Totals			
Domestic	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
SEPT	1,886,943	2,644,948	2,980,868	3,395,431	17,246,291	15,695,507	13,294,137	16,023,520
OCT	1,929,496	2,860,257	3,294,710	3,625,444	13,936,701	18,654,961	19,839,442	21,315,252
NOV	2,429,614	2,818,005	3,533,617	4,034,155	17,024,323	18,303,221	20,123,187	22,651,012
DEC	2,083,266	3,182,189	3,428,002	3,534,888	20,110,776	21,916,071	23,287,844	20,120,210
JAN	2,487,074	3,322,326	3,696,971	4,551,688	14,227,445	18,514,199	19,523,725	18,032,784
FEB	1,910,976	2,580,069	3,277,720	4,462,633	14,513,690	15,912,512	16,175,764	16,073,753
MAR	2,570,497	3,342,677	3,917,022	5,722,871	18,687,218	19,244,052	20,557,545	23,283,148
APR	2,593,113	3,241,142	3,210,878	3,688,465	15,497,500	16,984,853	19,933,538	14,832,498
MAY	3,352,930	4,097,332	3,497,740	3,572,708	15,786,191	15,064,196	19,065,207	16,879,806
JUN	2,906,441	3,619,159	3,711,121	4,295,885	17,728,580	19,312,641	19,163,867	18,963,064
JUL	2,550,222	3,120,917	3,919,811	3,975,327	12,332,824	14,312,227	15,967,276	15,569,480
AUG	3,298,760	4,059,068	5,031,623	4,570,077	18,035,743	16,197,263	19,494,842	18,397,883
TOTAL DOMESTIC	29,999,332	38,888,089	43,500,083	49,429,572	195,127,282	210,111,703	226,426,374	222,142,410
SHIPMENTS	64.2%	64.1%	69.3%	71.4%	30.9%	33.8%	28.1%	37.7%
Export	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
SEPT	1,008,142	1,539,168	923,003	1,401,399	37,106,357	21,877,081	25,587,202	20,067,336
OCT	727,288	1,225,008	953,692	904,770	73,974,474	62,301,945	64,578,783	57,082,648
NOV	1,301,511	1,772,547	1,354,306	2,039,335	60,806,997	74,688,400	109,564,777	64,294,334
DEC	1,469,009	2,242,600	1,927,853	2,160,539	28,307,239	45,481,499	37,134,102	26,290,180
JAN	1,122,718	1,036,993	1,680,655	2,725,656	29,196,686	28,144,524	36,953,210	38,119,113
FEB	809,707	1,435,346	1,738,671	2,690,762	29,417,051	27,905,958	38,216,611	29,789,048
MAR	2,722,416	1,784,022	1,704,611	2,175,461	34,698,229	36,591,745	59,065,768	32,718,220
APR	1,001,908	754,160	1,337,139	1,087,951	25,162,243	29,907,236	45,008,065	27,587,572
MAY	1,241,548	3,320,859	1,976,187	1,000,427	23,789,813	23,606,877	37,061,570	19,897,658
JUN	1,307,223	3,003,081	1,428,179	1,150,228	27,749,247	26,016,869	43,524,969	19,948,026
JUL	1,924,223	2,895,603	2,361,339	998,715	28,938,146	21,472,408	42,912,608	14,950,384
AUG	2,128,464	753,543	1,848,811	1,460,511	37,812,465	13,115,390	38,968,109	15,733,305
TOTAL EXPORT	16,764,157	21,762,930	19,234,446	19,795,754	436,958,947	411,109,932	578,575,774	366,477,824
SHIPMENTS	35.8%	35.9%	30.7%	28.6%	69.1%	66.2%	71.9%	62.3%
YEAR TOTALS	46,763,489	60,651,019	62,734,529	69,225,326	632,086,229	621,221,635	805,002,148	588,620,234



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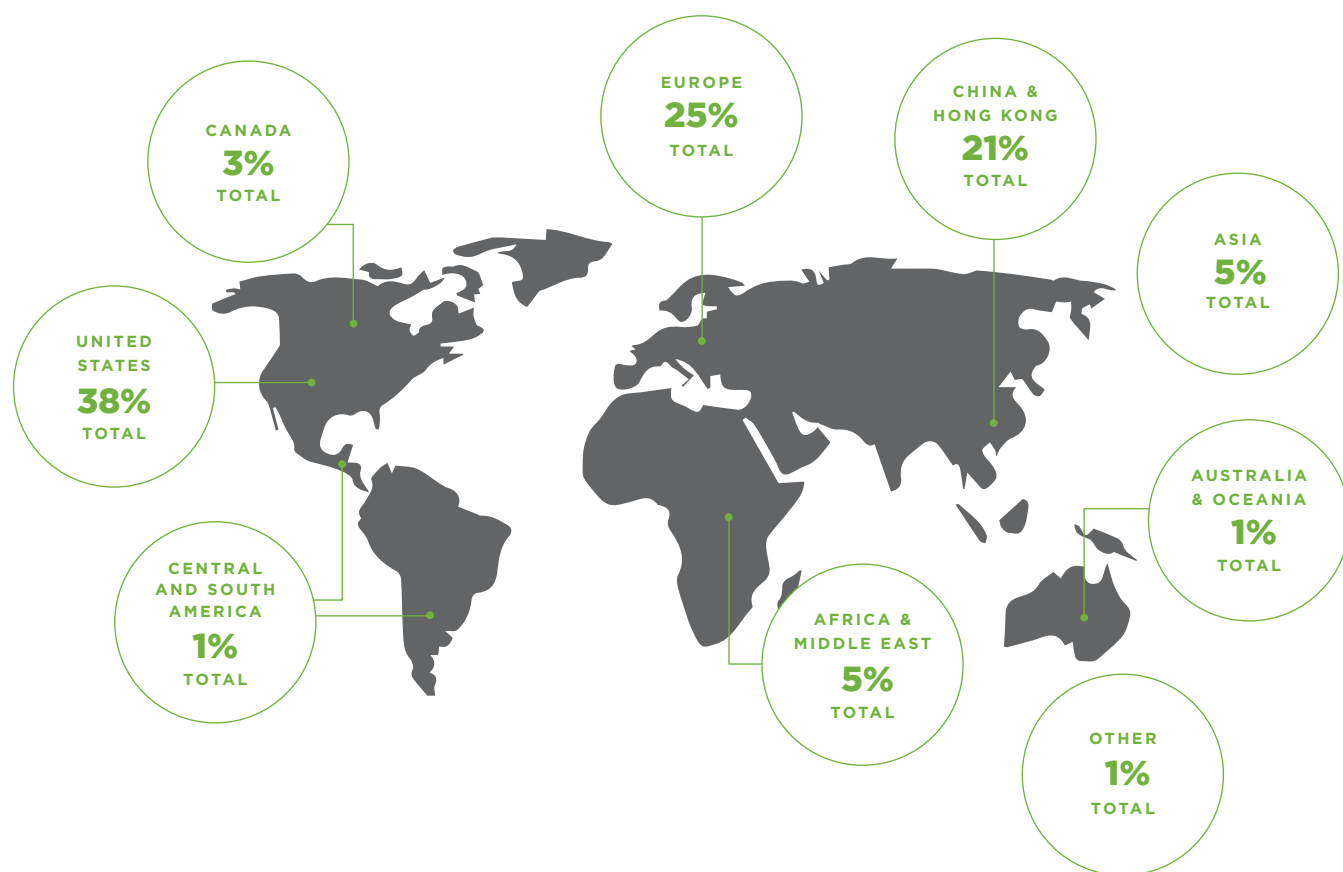
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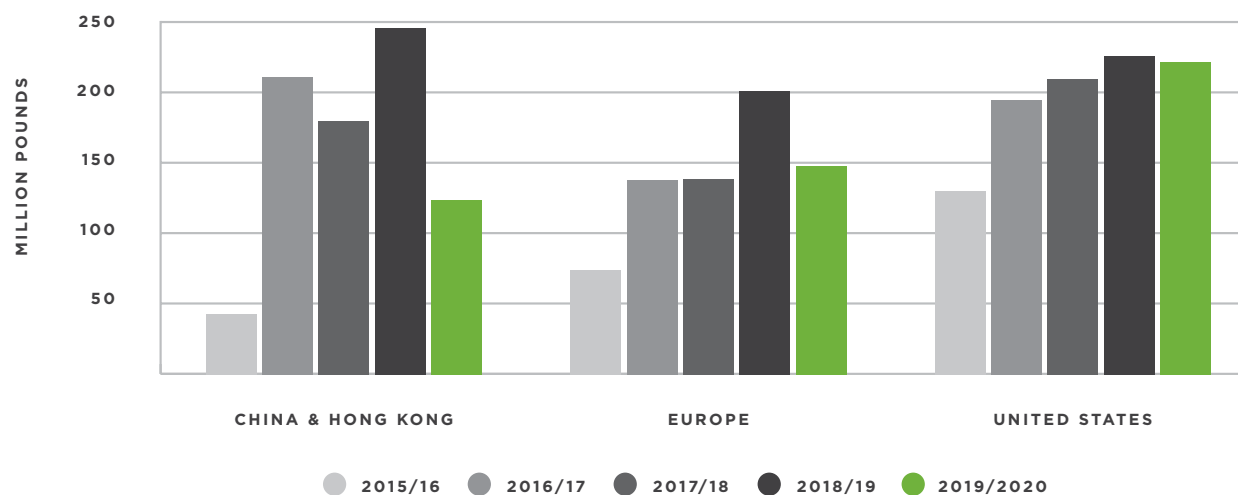
Shipment Destinations

2019/20 Total For All Categories



Top Destinations

2015-2020 Pistachio Shipments



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New Sequoia[®] CA insecticide hits Gill's mealybug like a ten-ton brick. It comes from a unique class of chemistry – the sulfoximines – and has never been used in pistachios. The different mode of action makes Sequoia CA an excellent rotation partner in full-season IPM programs with other classes of chemistry. And Sequoia CA fits perfectly into pest management programs that rely on beneficial insects. Sequoia CA can also be used to manage aphids in walnuts and pecans. To learn more, contact your pest control advisor.

Exports by Destination in Pounds

	OPEN INSHELL				ARTIFICIALLY OPENED			
COUNTRY	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
ALGERIA	630,548	0	493,182	310,346	0	0	0	0
ARGENTINA	20,328	25,596	79,660	94,548	0	0	0	0
AUSTRALIA	3,798,444	5,254,651	5,763,249	3,975,435	0	0	0	0
BELGIUM	15,337,676	6,816,117	7,594,577	10,305,915	0	0	0	0
BRAZIL	653,473	385,945	541,514	298,074	0	0	0	0
BULGARIA	167,250	346,950	331,650	245,950	0	0	0	0
CANADA	13,911,302	16,411,290	17,581,863	16,097,232	0	0	0	0
CHILE	451,682	494,909	649,675	415,144	0	0	0	0
CHINA	69,875,870	78,487,908	98,241,354	70,363,118	0	0	0	0
COLOMBIA	145,921	321,612	528,075	735,522	0	0	0	0
COSTA RICA	76,754	0	57,505	64,585	0	0	0	0
CYPRUS	54,000	122,750	115,900	108,400	0	0	0	0
CZECH REPUBLIC	28,600	100,400	1,743,700	388,000	0	0	0	0
DENMARK	0	0	0	0	0	0	0	0
ECUADOR	50,000	80,000	115,750	136,000	0	0	0	0
EGYPT	562,181	335,576	1,085,952	2,007,077	0	0	0	0
FRANCE	7,755,977	5,460,600	9,258,161	6,767,206	66,000	0	0	0
GERMANY	43,664,950	38,392,656	61,031,535	57,784,069	2,000	0	0	0
GREECE	99,000	168,000	552,600	411,000	0	0	0	0
GUATEMALA	48,486	32,000	48,000	32,000	0	0	0	0
HONG KONG	83,476,849	50,038,646	70,069,408	29,333,796	0	0	0	0
INDIA	4,668,104	6,378,662	15,043,375	3,242,350	0	0	0	0
INDONESIA	12,207	24,007	42,256	52,006	0	0	0	0
ISRAEL	10,561,975	5,888,494	8,365,625	6,723,742	0	0	0	0
ITALY	6,934,604	5,629,921	8,722,800	7,035,251	0	0	0	0
JAPAN	2,540,505	2,502,500	3,722,360	3,716,975	0	0	0	0
KOREA	1,480,416	1,414,619	1,479,694	1,405,171	0	0	0	0
LATVIA	107,200	540,700	762,200	253,234	0	0	0	0
LEBANON	217,000	293,425	442,212	75,350	0	0	0	0
LITHUANIA	1,718,950	1,984,469	3,094,295	2,252,835	0	0	0	0
LUXEMBOURG	11,660,000	15,664,000	17,505,400	3,959,587	0	0	0	0
MALAYSIA	634,097	792,853	1,131,404	789,540	0	0	0	0
MEXICO	3,653,624	5,044,904	6,178,830	6,137,669	222,000	0	0	0
NETHERLANDS	17,241,316	17,167,088	18,893,750	6,203,030	572,000	0	0	0
NEW ZEALAND	938,121	733,833	794,294	669,565	0	0	0	0
NORWAY	350,000	305,250	339,000	325,550	0	0	0	0
PERU	207,339	206,465	442,822	286,925	0	0	0	0
POLAND	772,600	655,491	2,258,833	2,813,650	0	0	0	0
PORTUGAL	339,750	337,150	298,350	531,531	0	0	0	0
ROMANIA	22,000	0	758,600	203,122	0	0	0	0
RUSSIA	42,000	0	49,500	259,000	0	0	0	0
SAUDI ARABIA	9,109,667	10,609,731	13,093,112	12,527,010	0	0	0	0
SINGAPORE	484,412	351,922	737,652	518,267	17,500	0	0	0
SOUTH AFRICA	129,000	190,500	653,250	376,250	0	0	0	0
SPAIN	9,017,327	10,953,930	23,254,612	24,487,298	0	0	0	0
SWEDEN	60,500	0	235,950	375,750	0	0	0	0
SWITZERLAND	2,037,675	1,119,828	1,573,750	1,332,000	0	0	0	0
TAHITI	3,215	4,202	5,443	62,009	0	0	0	0
TAIWAN	882,752	622,220	1,772,392	1,515,442	0	0	0	0
THAILAND	1,306,900	1,230,800	2,083,922	665,800	0	0	0	0
THE PHILIPPINES	289,531	342,158	459,081	430,369	0	0	0	0
TURKEY	3,423,800	4,715,609	4,225,582	293,413	0	0	0	0
UKRAINE	53,250	78,450	749,825	1,317,175	53,500	0	0	0
UNITED ARAB EMIRATES	4,449,200	6,173,044	10,129,711	3,412,943	0	0	0	0
UNITED KINGDOM	5,318,848	6,733,274	9,622,470	7,189,178	0	0	0	0
VENEZUELA	0	47,841	0	0	0	0	0	0
VIETNAM	8,249,574	5,807,200	7,189,640	6,083,513	0	0	0	0
OTHER	2,758,948	5,932,418	10,824,345	4,407,067	0	0	0	0
TOTALS	352,485,698	323,752,564	452,819,647	311,802,984	933,000	0	0	0



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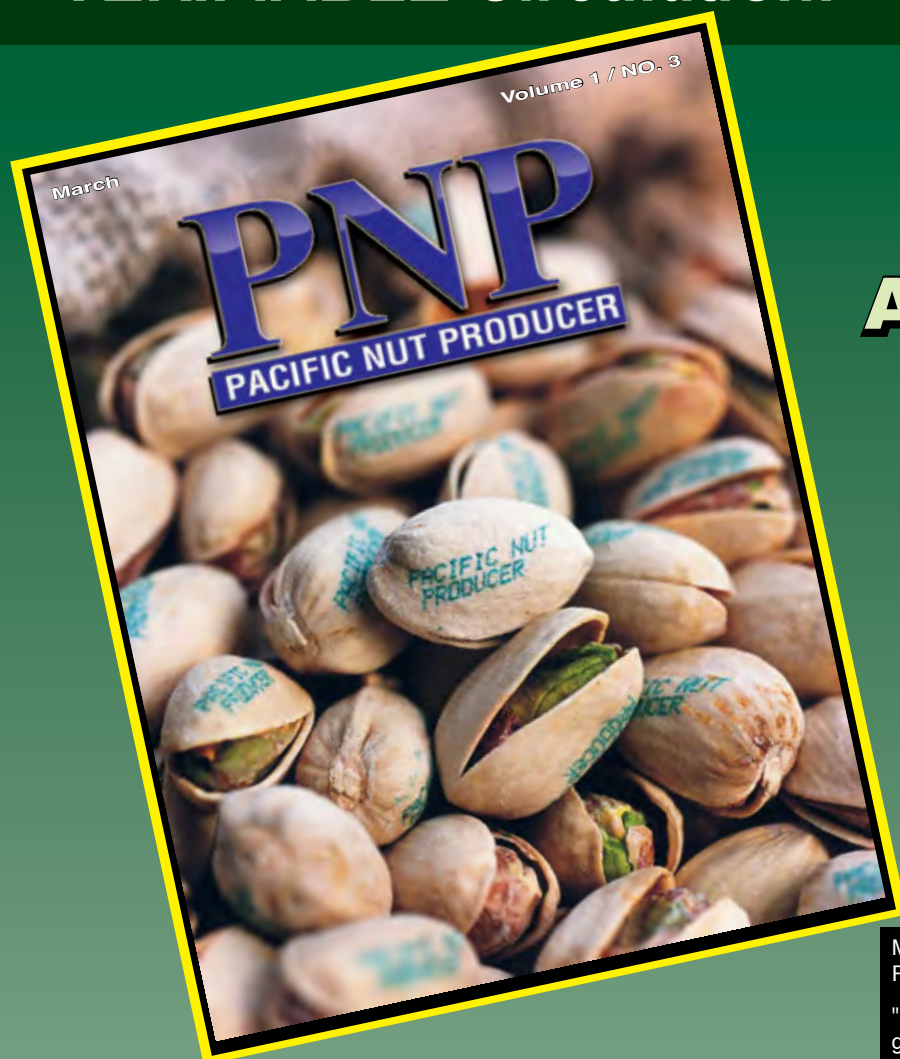
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Exports by Destination in Pounds

	CLOSED SHELL				SHELLING STOCK			
COUNTRY	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
ALGERIA	0	0	0	0	0	0	0	0
ARGENTINA	0	0	0	0	0	0	0	0
AUSTRALIA	0	0	0	0	0	0	0	0
BELGIUM	0	0	0	0	0	0	0	0
BRAZIL	0	0	0	0	0	0	0	0
BULGARIA	0	0	0	0	0	0	0	0
CANADA	0	0	0	0	0	0	0	0
CHILE	0	0	0	0	0	0	0	0
CHINA	30,931,114	28,779,321	37,534,596	12,446,979	1,962	484,000	914,431	91,462
COLOMBIA	0	0	0	0	0	0	0	0
COSTA RICA	0	0	0	0	0	0	0	0
CYPRUS	220,000	0	130,000	44,000	0	0	0	0
CZECH REPUBLIC	0	0	0	0	0	0	0	0
DENMARK	0	0	0	0	0	0	0	0
ECUADOR	0	0	0	0	0	0	0	0
EGYPT	41,667	43,000	43,000	86,000	0	0	0	0
FRANCE	0	0	0	0	0	0	0	0
GERMANY	20,671	0	220,000	0	0	0	0	0
GREECE	0	0	0	0	0	0	0	0
GUATEMALA	0	0	0	0	0	0	0	0
HONG KONG	26,759,744	20,714,730	34,169,217	10,962,231	184,871	1,292,792	4,028,942	248,530
INDIA	0	0	346,000	44,000	0	88,000	1,295,600	66,000
INDONESIA	0	0	0	0	0	0	0	0
ISRAEL	0	0	0	0	0	0	0	0
ITALY	1,363,333	2,569,600	2,932,600	1,137,106	220,000	377,800	303,650	88,000
JAPAN	0	0	0	0	0	0	0	0
KOREA	0	0	0	0	0	0	0	0
LATVIA	0	0	0	0	0	0	0	0
LEBANON	386,750	301,000	430,000	86,000	0	0	0	0
LITHUANIA	0	0	0	0	0	0	0	0
LUXEMBOURG	0	0	0	0	0	0	0	0
MALAYSIA	0	0	0	0	0	0	0	0
MEXICO	0	27,800	0	0	0	0	132,000	0
NETHERLANDS	0	0	0	0	0	0	0	0
NEW ZEALAND	0	0	0	0	0	0	0	0
NORWAY	0	0	0	0	0	0	0	0
PERU	0	0	0	0	0	0	0	0
POLAND	0	0	37,307	0	0	0	0	0
PORTUGAL	0	0	0	0	0	0	0	0
ROMANIA	0	0	0	0	0	0	0	0
RUSSIA	0	0	0	0	0	0	0	0
SAUDI ARABIA	643,617	520,950	129,000	-43,000	0	0	0	0
SINGAPORE	0	0	0	0	0	0	0	0
SOUTH AFRICA	0	0	0	0	0	0	44,000	0
SPAIN	87,400	0	0	0	44,000	0	0	123,500
SWEDEN	0	0	0	0	0	0	0	0
SWITZERLAND	0	0	0	0	0	0	0	0
TAHITI	0	0	0	0	0	0	0	0
TAIWAN	0	0	0	0	0	0	0	0
THAILAND	0	0	132,000	0	0	0	0	0
THE PHILIPPINES	0	0	0	0	0	0	0	0
TURKEY	607,596	3,529,662	10,403,760	1,643,657	44,000	2,682,983	4,933,373	2,517,133
UKRAINE	0	0	0	0	0	0	0	0
UNITED ARAB EMIRATES	0	396,000	0	0	0	0	301,000	0
UNITED KINGDOM	312,000	0	0	0	0	0	0	0
VENEZUELA	0	0	0	0	0	0	0	0
VIETNAM	1,424,752	1,502,970	1,184,052	2,070,630	19,065	352,880	1,534,153	3,048,908
OTHER	3,463,550	1,930,950	3,293,000	174,950	0	0	2,050,000	0
TOTALS	66,262,194	60,315,983	90,984,532	28,652,553	513,898	5,278,455	15,537,149	6,226,533

Source: Administrative Committee for Pistachios Inventory/Shipments Reports, Year ended August 31.

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Martin Ochoa is a farm labor contractor & manages 280 acres of Pistachios in Terra Bella & he reads Pacific Nut Producer Magazine.

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Exports by Destination in Pounds

	KERNALS				TOTALS			
COUNTRY	2016/17	2017/18	2018/19	2019/20	2016/17	2017/18	2018/19	2019/20
ALGERIA	172,000	0	0	0	802,548	0	493,182	353,346
ARGENTINA	0	0	0	457	20,328	25,596	79,660	95,005
AUSTRALIA	1,122,046	992,449	1,032,203	1,040,425	4,920,490	6,247,100	6,795,452	5,015,860
BELGIUM	254,000	169,830	128,063	44,000	15,591,676	6,985,947	7,722,640	10,349,915
BRAZIL	167,358	195,337	186,691	39,846	820,831	581,282	728,205	337,920
BULGARIA	0	0	3,300		167,250	346,950	334,950	245,950
CANADA	1,265,548	1,911,707	2,057,413	3,065,789	15,176,850	18,322,997	19,639,276	19,163,021
CHILE	10,440	11,848	13,200	13,950	462,122	506,757	662,875	429,094
CHINA	468,678	612,014	1,338,200	759,888	101,277,624	108,363,243	138,028,581	83,661,447
COLOMBIA	13,375	2,014	10,800	2,400	159,296	323,626	538,875	737,922
COSTA RICA	10,410	0	9,900		87,164	0	67,405	64,585
CYPRUS	13,200	0	43,650	4,200	287,200	122,750	289,550	156,600
CZECH REPUBLIC	44,000	47,180	22,500	29,500	72,600	147,580	1,766,200	417,500
DENMARK	0	0	0		0	0	0	0
ECUADOR	0	0	8,100	3,000	50,000	80,000	123,850	139,000
EGYPT	0	0	0		603,848	378,576	1,128,952	2,093,077
FRANCE	1,425,744	1,521,820	1,076,475	606,170	9,247,721	6,982,420	10,334,636	7,373,376
GERMANY	675,229	1,252,920	951,191	1,906,218	44,362,850	39,645,576	62,202,726	59,690,287
GREECE	15,000	0	104,736	22,200	114,000	168,000	657,336	433,200
GUATEMALA	0	0	0		48,486	32,000	48,000	32,000
HONG KONG	157,064	103,102	288,436	269,142	110,578,528	72,149,270	108,556,003	40,813,699
INDIA	1,027,355	354,776	1,388,612	1,499,100	5,695,459	6,821,438	18,073,587	4,851,450
INDONESIA	0	0	0		12,207	24,007	42,256	52,006
ISRAEL	609,040	447,500	373,460	552,610	11,171,015	6,335,994	8,739,085	7,276,352
ITALY	537,800	879,811	2,368,002	1,182,451	9,055,737	9,457,132	14,327,052	9,442,808
JAPAN	419,850	448,170	609,300	661,410	2,960,355	2,950,670	4,331,660	4,378,385
KOREA	324,510	114,200	251,570	397,665	1,804,926	1,528,819	1,731,264	1,802,836
LATVIA	0	0	0		107,200	540,700	762,200	253,234
LEBANON	0	88,279	119,990		603,750	682,704	992,202	161,350
LITHUANIA	98,400	68,340	167,940	44,275	1,817,350	2,052,809	3,262,235	2,297,110
LUXEMBOURG	75	0	0	645,064	11,660,075	15,664,000	17,505,400	4,604,651
MALAYSIA	29,800	1,800	30,106	9,203	663,897	794,653	1,161,510	798,743
MEXICO	718,051	24,204	92,392	114,971	4,593,675	5,096,908	6,403,222	6,252,640
NETHERLANDS	465,245	502,920	649,200	908,395	18,278,561	17,670,008	19,542,950	7,111,425
NEW ZEALAND	56,700	21,270	28,856	26,813	994,821	755,103	823,150	696,378
NORWAY	46,000	46,000	43,000	25,000	396,000	351,250	382,000	350,550
PERU	0	0	0		207,339	206,465	442,822	286,925
POLAND	0	0	0		772,600	655,491	2,296,140	2,813,650
PORTUGAL	0	0	0		339,750	337,150	298,350	531,531
ROMANIA	0	0	0		22,000	0	758,600	203,122
RUSSIA	0	0	0	39,000	42,000	0	49,500	298,000
SAUDI ARABIA	0	130,935	0	258,000	9,753,284	11,261,616	13,222,112	12,742,010
SINGAPORE	62,325	34,150	220,031	10,996	564,237	386,072	957,683	529,263
SOUTH AFRICA	24,600	24,000	30,000	80,818	153,600	214,500	727,250	457,068
SPAIN	50,197	66,330	9,600	2,100	9,198,924	11,020,260	23,264,212	24,612,898
SWEDEN	31,350	24	0		91,850	24	235,950	375,750
SWITZERLAND	42,015	1,530	0	124,000	2,079,690	1,121,358	1,573,750	1,456,000
TAHITI	0	0	0	42,900	3,215	4,202	5,443	104,909
TAIWAN	0	43,800	13,000	29,300	882,752	666,020	1,785,392	1,544,742
THAILAND	48,600	53,430	275,400	156,300	1,355,500	1,284,230	2,491,322	822,100
THE PHILIPPINES	132,588	35,724	37,337	24,216	422,119	377,882	496,418	454,585
TURKEY	4,426,843	7,129,914	2,745,744	1,510,005	8,502,239	18,058,168	22,308,459	5,964,208
UKRAINE	0	0	6,600		106,750	78,450	756,425	1,317,175
UNITED ARAB EMIRATES	52,075	49,500	144,879	46,948	4,501,275	6,618,544	10,575,590	3,459,891
UNITED KINGDOM	668,962	840,002	1,238,290	1,163,140	6,299,810	7,573,276	10,860,760	8,352,318
VENEZUELA	60,120	4,519	0		60,120	52,360	0	0
VIETNAM	99,883	1,406,408	950,531	464,301	9,793,274	9,069,458	10,858,376	11,667,352
OTHER	917,681	2,125,173	165,748	1,969,588	7,140,179	9,988,541	16,333,093	6,551,605
TOTALS	16,764,157	21,762,930	19,234,446	19,795,754	436,958,947	411,109,932	578,082,592	366,477,824



TONY BAGATO PRESIDENT CPEC

Export Market Report

“Moving forward, the U.S. pistachio industry will face additional challenges that will require steadfast attention from those throughout the industry.”

In a year that has posed unique challenges for the U.S. pistachio industry, the importance of the California Pistachio Export Council (CPEC) has only been made more evident. CPEC is a group of principals from seven of the largest pistachio processors in California who provide a collective effort to create stable markets for American pistachio exporters. Stability is vital for the prosperity of the U.S. pistachio industry, so our members work to cultivate reliable markets and optimize pistachio sales.

Accordingly, CPEC closely monitors pistachio production to influence market conditions so they are best suited to receive the available U.S. supply. As expected, we had an above average off-year of production for the 2019/2020 crop, bringing in a receipt of 749 million pounds. Combined with the carryover, the U.S. pistachio industry had an available supply of 816 million pounds. Our efforts helped the industry successfully market this product despite tariffs, regulatory restrictions, increased competition, the coronavirus pandemic, and economic downturn. The pistachio industry has now broken billion-pound mark with its 1.05-billion-pound harvest in 2020, bringing the available supply to 1.1 billion-pounds. With the U.S. crop hitting record highs and the continued development of a strong foundation for upward trajectory, CPEC is diligently working in collaboration with APG's Marketing Committee to employ a robust generic advertising and marketing campaign to amass sufficient consumer demand.

Export markets are vital to the U.S. pistachio industry, but the ongoing trade dispute with China, changes in international competition, and the coronavirus pandemic contributed to lower international shipments in the 2019/2020 crop year. The coronavirus pandemic shocked markets around the globe, causing uncertainty and closures that impacted our industry. Prior to the COVID-19 outbreak, U.S. pistachio shipments were increasing to Europe, India, and the Middle East. The Indian market in particular has been heavily affected by the pandemic, with the importation of U.S. pistachios essentially stopping after its first lockdown was imposed in March 2020. Throughout this volatile period, the recently signed U.S.-Mexico-Canada Agreement (USMCA) has permitted our partners in Mexico and Canada to demonstrate their reliability and provide strong markets for U.S. pistachio sales.

Shipments to China, one of our industry's main export destinations, declined over the past year, and there were multiple factors contributing to this decline. Despite demand having been strong in recent years, China's 50 percent tariffs on U.S. raw in-shell and shelled pistachios and 15 or 30 percent tariffs on U.S. roasted pistachios largely affected demand last year. The effect of these high duties was exacerbated by supply chain disruption and shifts in purchasing that resulted from the spread of COVID-19. Iran recovered from its poor 2018 harvest and returned as a viable competitor in the Chinese market. Iran was able to provide a substantial supply of pistachios to China in the 2019/20 marketing year. Iranian product is typically lower priced and not subjected to the same high duties by which importers of U.S. product must contend. Combined, these factors contributed to a loss in demand that CPEC is working diligently to combat in marketing year 2020/21.

To that end, CPEC makes a substantial effort to effectively respond to challenges and convert them into opportunities. With the drop in demand from China, we have taken opportunity to further diversify our operations and develop an industry less vulnerable to negative impacts from individual market changes. Simultaneously, we continue to prioritize expanded market presence in other key locations.

Even with the effects of the pandemic and China's tariffs, demand outlook remains favorable and is set to keep pace with the expansion in U.S. pistachio production. Moving forward, the U.S. pistachio industry will face

additional challenges that will require steadfast attention from those throughout the industry. The European Union was the leading importer of U.S. pistachios in marketing year 2019/20, and to keep this market strong, we must minimize shipment failures due to aflatoxin detection. Navel Orangeworm (NOW) damage is associated with the presence of aflatoxin in our exported pistachios so growers must take every available step to control NOW in their orchards. In addition to this food safety concern, the EU is likely to impose new restrictive Ochratoxin A (OTA) measures. Separately, the timeline for concluding U.S. trade negotiations with the EU and UK are unclear, but CPEC maintains the objective of removing tariffs in these agreements. The removal of these duties could stimulate increased demand for our pistachios. Industry support and CPEC leadership will be required to adequately address these challenges and secure these priorities.

Between APG's membership assessment and the CPEC member's export programs, tens of millions of dollars are being made available to increase exports. Furthermore, the U.S. pistachio industry is fortunate that APG (formerly known as Western Pistachio Association), the California Pistachio Commission (CPC), the Administrative Committee for Pistachios (ACP), California Pistachio Research Board, and CPEC built a strong foundation of state, federal, and international laws, regulations and programs permitting us to export to a myriad of countries. The annual World Pistachio Trade Report and the ACP's trade report demonstrate how our industry's organizations took the initiative in the early 1980s to open foreign markets. From removing tariffs and non-tariff barriers to participating in Farm Bill programs, such as the Market Access Program, the Specialty Crop Research Initiative program, and state block grants, we have steadily removed export obstacles. We maintain this same progressive mentality and continue to push for the most favorable market conditions.

The California Pistachio Export Council's members currently include Arizona Nut Company, LLC, Horizon Growers Cooperative, Inc., Keenan Farms, Inc., Monarch Nut Company, Primex Farms, LLC, Setton Pistachio of Terra Bella, Inc., and Zymex Industries, Inc. CPEC is organized under the Export Trading Act of 1982 and it received its certificate from the U.S. Department of Commerce and U.S. Department of Justice in 2003. The purpose of the Act is to encourage industries to export and the Council members have taken advantage of the program to steadily increase pistachio exports.

Member Processors / Suppliers

The American Pistachio Growers leadership would like to formally acknowledge the considerable, consistent support of our Member Processors. This partnership is the core of our voluntary organization, and we encourage all growers to recognize their unique commitment to the success of our Association and the entire American pistachio industry.

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	GROWER	HULLING & DRYING	ROASTING	RAW	NATURAL*	SALTED*	UNSALTED*	BULK	PACKAGED	RAW	SALTED*	UNSALTED*	DICED	MEAL/FLOUR	OIL	BULK	PACKAGED	FLAVORED**	CONFECTIONARY**	BUTTER/PASTE	KOSHER	EXPORT	ORGANIC
Arizona Nut Company 410 W Pistachio Lane Bowie, AZ 559.458.7272 info@meridiangrowers.com meridiangrowers.com	•	•	•	•	•	•	•	•		•	•	•				•					•	•	
Buchanan Hollow Nut Co. 6510 Minturn Road Le Grand, CA 209.389.4597 sharleen@bhnc.com BHNC.com	•	•	•	•	•	•	•	•	•	•	•	•		•		•	•	•			•	•	•
Eagle Ranch Pistachios 7288 Highway 54/70 Alamogordo, NM 800.432.0999 sales@heartofthedesert.com heartofthedesert.com	•	•	•		•	•	•	•	•		•	•				•	•	•	•		•		
Eriksson LLC / Ingelby USA PO Box 6280 Visalia, CA 559.635.3138 grs@inglebyfarms.com inglebyfarms.com	•	•		•																		•	
Fiddymment Farms P.O. Box 245 563 Second St, Suite 210 Lincoln, CA 916.645.7244 info@fiddymmentfarms.com fiddymmentfarms.com	•				•	•	•	•	•	•	•	•				•	•	•	•	•		•	
Horizon Nut LLC 26487 N Hwy 99 Tulare, CA 559.685.3663 sales@horizonnut.com horizonnut.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•				•	•	•
Keenan Farms, Inc. 31510 Plymouth Ave Kettleman City, CA 559.945.1400 beth@keenanfarms.com keenanfarms.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•	•	•		•	•	

*Roasted **Specialty

Member Processors / Suppliers

CONTACT THESE
GROWER-OWNED
SUPPLIERS FOR
AMERICAN QUALITY
PISTACHIOS
DIRECT FROM THE
ORCHARD.

GROWER-OWNED SUPPLIERS FOR AMERICAN QUALITY PISTACHIOS DIRECT FROM THE ORCHARD.					INSHELL							KERNELS											
	GROWER	HULLING & DRYING	ROASTING	RAW	NATURAL*	SALTED*	UNSALTED*	BULK	PACKAGED	RAW	SALTED*	UNSALTED*	DICED	MEAL/ FLOUR	OIL	BULK	PACKAGED	FLAVORED**	CONFECTIONARY**	BUTTER/ PASTE	KOSHER	EXPORT	ORGANIC
Meridian Growers 1625 Howard Road, #280 Madera, CA 559.458.7272 info@meridiangrowers.com meridiangrowers.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•				•	•	
Monarch Nut Company 786 Road 188 Delano, CA 661.721.1061 kamie@monarchnut.com mungerfarms.com	•	•	•	•	•	•	•	•	•	•	•	•	•			•	•		•		•	•	
Nichols Farms 13762 First Avenue Hanford, CA 559.584.6811 sales@nicholsfarms.com nicholsfarms.com	•	•	•	•	•	•	•	•	•	•	•	•		•		•	•		•		•	•	•
Primex Farms, LLC 16070 Wildwood Road Wasco, CA 661.758.7790 info@primexfarms.com primexfarms.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•	•	•		•	•	
Setton Pistachio of Terra Bella, Inc. P.O. Box 11089 9370 Road 234 Terra Bella, CA 559.535.6050 info@settonfarms.com settonfarms.com	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•
Touchstone Pistachio Company 1306 W Herndon Avenue, Suite 101 Fresno, CA 559.470.3510 rudy.placencia@touchstonepistachio.com	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•	•	
Zymex Industries, Inc. 168 Hawk Drive Merced, CA 209.722.2770 info@zymex.com zymex.com	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•					•	•	

*Roasted **Specialty



At Touchstone Pistachio Company, we are dedicated to growing, nourishing, and educating our communities. We fulfill our purpose by serving our customers every single day by adhering to three main principles: transparency, performance, and commitment.

HERE'S TO GROWING INTO 2021
#FORWARDTOGETHER

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TERRA BELLA

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(559) 535-0110

CANTUA CREEK

34411 W. Kamm Avenue

Cantua Creek, CA 93608

OPENING AUGUST 2021

LEARN MORE
touchstonepistachio.com



Family Values You Can Count On

With the support of our growers, Setton Pistachio of Terra Bella has been producing “America’s Best Tasting Pistachios” for the past 35 years. From our humble beginnings, to where we are today, our innovations, continuous improvements, expansions, and investments have made our family business one you can count on. Our proprietary grower support programs help our growers reduce cost, increase yield and improve quality. We invite you to contact our Grower Relations Manager, Jeff Gibbons to find out how we can help you make every nut count.

**“When you’re one of our growers
you’re part of us, part of our family.”**




Joshua Setton
President / CEO



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