

# 2023

## Annual Report





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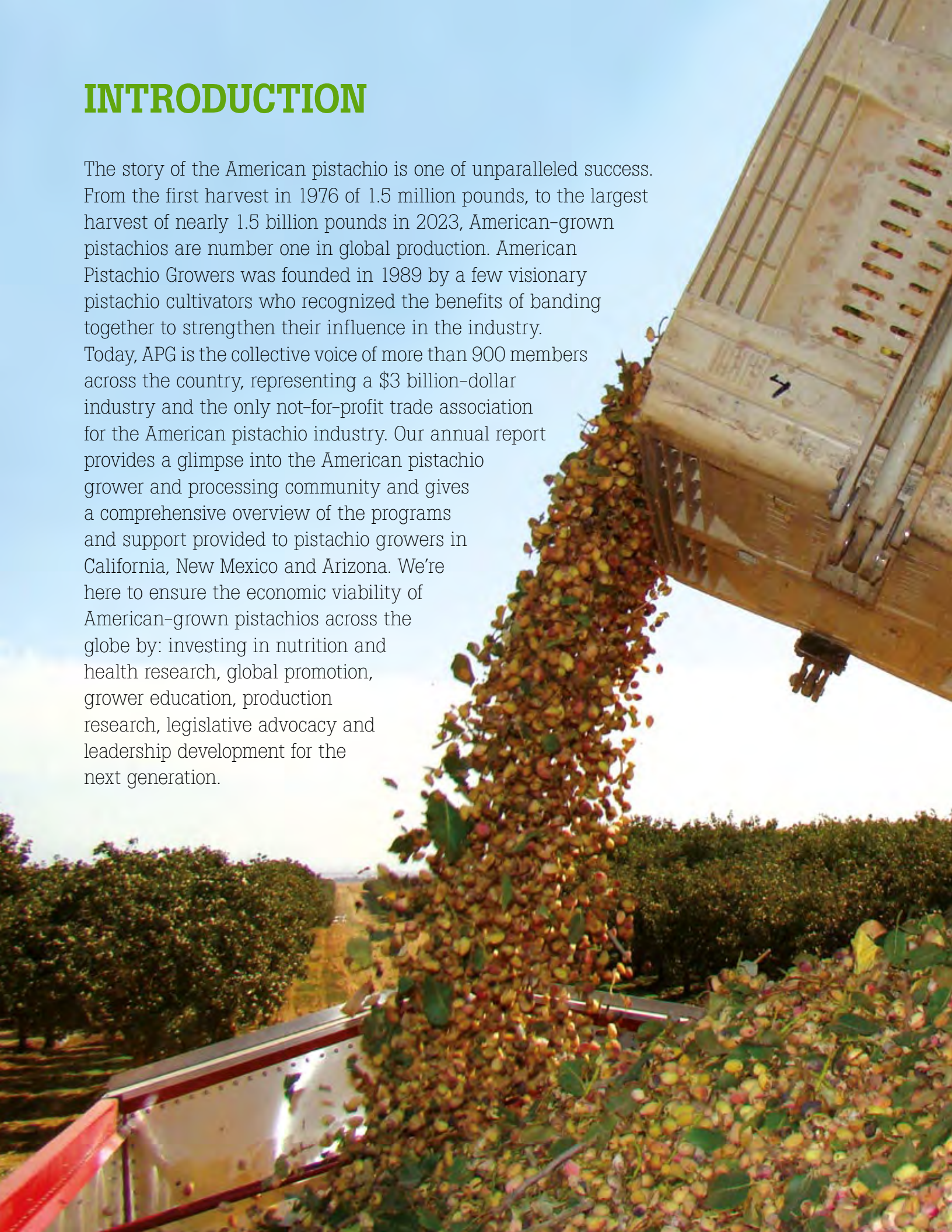
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# INTRODUCTION

The story of the American pistachio is one of unparalleled success. From the first harvest in 1976 of 1.5 million pounds, to the largest harvest of nearly 1.5 billion pounds in 2023, American-grown 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 900 members across the country, representing a \$3 billion-dollar industry and the only not-for-profit trade association for the American pistachio industry. 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 and health research, global promotion, grower education, production research, legislative advocacy and leadership development for the next generation.



# MISSION STATEMENT

Proactively propel the American pistachio industry forward through research, promotion, advocacy and member programs.

## AMERICAN PISTACHIO GROWERS STAFF

**Joel Nelsen**, Interim President

**Scott Fryer**, Vice President, Global Marketing

**Cadee Condit**, Director, Government Relations

**Wesley Wilson**, Director, Member Services & Communications

**Amber Wilson**, Director, Nutrition Research & Communication

**Genaro Gonzales**, Director, Digital Content

**Teresa Edwards**, Manager, Accounting

**Kendra Hall**, Marketing Project Manager

**Andrew Rezendes**, Digital Media Specialist

**Hannah Doyle**, Membership Services & Communications Coordinator

**Norene Foin**, Executive Assistant/Office Manager

**Lora Ferguson**, Administrative Assistant, Global Marketing

**Julie Pisano-Saldivar**, Receptionist/Administrative Assistant



# A MESSAGE FROM THE APG INTERIM PRESIDENT

Wow – a whole month into a new position and I have the privilege of writing a memo to the members about our recent year. Well, I'm not going to do that, but you can read all about the efforts, the successes and the challenges in the following pages. When the APG Executive Committee introduced me to the staff, there was an air of uncertainty. You could feel it in the room and that was to be expected. I told the staff and I relate it to you now: *"Contrary to what Executive Committee members said, I don't walk on water; but I am a helluva swimmer."*

It broke the ice and off we went. Trust me, while I don't farm pistachios, I do know and understand the challenges as I spent almost 40 years working with the California citrus industry. And while I can't tell you what crop protection materials to use, for example, I can impact the regulations that affect their use. We are energized to affect change in the halls of government, both at the federal level and at the state level where our members farm.

California in particular is not the most favorable place to farm presently. We know that, and together we can address those challenges. You provide the input and this staff will get done what is necessary. And that goes for market development expansion, and stimulus. There are lots of numbers that speak to the success or failure of these efforts, but at APG we will be focused on your net return per acre.

Our programs will quantify how they affect your bottom line. Just talking or relaying a message is not communicating. Making sure the targeted audience receives and understands the message, therefore helping them achieve the stated goal, is our focus. This includes maximizing educational opportunities, providing government



**Joel Nelsen**  
American Pistachio Growers  
Interim President

funds as Mother Nature deals you setbacks, and maximizing the market to your economic needs.

There's one team, one family, and it is APG and the industry members producing a flavorful and healthy nut. You have made things happen in a very successful manner. That will continue with a slightly different focus, and even higher energy level, but the stated goal never changes, *maximizing your net return per acre.*

**The Board of Directors is you. The communication of that message is representatives that meet regularly to articulate the needed message. The staff is the team charged with getting it done; and we will. Thank you for allowing me to help.**



# Time for Some Real Talk!

American Pistachio Growers are crushing it with LIME SULFUR ULTRA. This isn't just your run-of-the-mill solution. It's a bona-fide WEAPON against labeled pests, from Mealybug, San Jose Scale and mites, to the notorious Alternaria and other over wintering invaders.



With rising input costs and pistachio prices that aren't mirroring the increase, ORCAL still has your back, just like your best friend. LIME SULFUR ULTRA takes on the nastiest pests like a heavyweight champ, but it doesn't punch a hole in your wallet.

This solution is as easy as it gets - no need for a closed system, and it is OMRI Listed. With rates that vary from 2 quarts to a generous 3 gallons, this is next level - it makes your grandpa's lime sulfur look like it's throwing a kiddie punch.

Best of all, LIME SULFUR ULTRA's got you covered whether your trees are in full bloom or kicking back dormant. Say hello to one of the toughest warriors in the pest control arena.

Fight smarter, not harder? With **LIME SULFUR ULTRA** you can do both!

Wanna know more about this hard hitter? Visit [www.ORCALinc.com](http://www.ORCALinc.com) or better yet, chat up your local Crop Advisor - they've got the 411 you need.



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AMERICAN PISTACHIO GROWERS

# STRENGTH IN NUMBERS



# A MESSAGE FROM THE APG BOARD OF DIRECTORS CHAIR

Dear Growers,

As I am writing this annual message, the dam has finally broken with a nearly 1.5 billion-pound crop, which is exactly what we have been hoping for, and now we must figure how to best manage it for this year and probably every other year going forward. We also need to avoid the many challenges that the rest of the nut growers are struggling with, and hopefully we have laid the foundations to avoid many of them. The first thing we have going for us is that we are a 100% volunteer group of growers and processors that elect our leaders and plan our strategies years in advance. In fact, our board just had a new strategic update weekend on all the challenges and opportunities ahead of us. We recently filled several vacancies within our organization, and we had a record attendance at this year's Annual APG Conference and at our Annual Growers' Luncheon. There is tremendous excitement from all our growers, and we are filling up our committee assignments.

Let's review what we are working on: the APG Annual Conference is moving back to Monterey, so make sure you have signed up because we are filling up fast; we have chosen two new markets to promote our pistachios, Mexico and the Middle East, and of course continue with our phenomenal opportunity to grow in India. We have secured a multimillion-dollar Healthy Soils Grant and are working on a new Tootelian study on pistachio production and how APG is positioned to address consumer needs into the future to help move this increased production. APG has created an ad hoc Sustainability

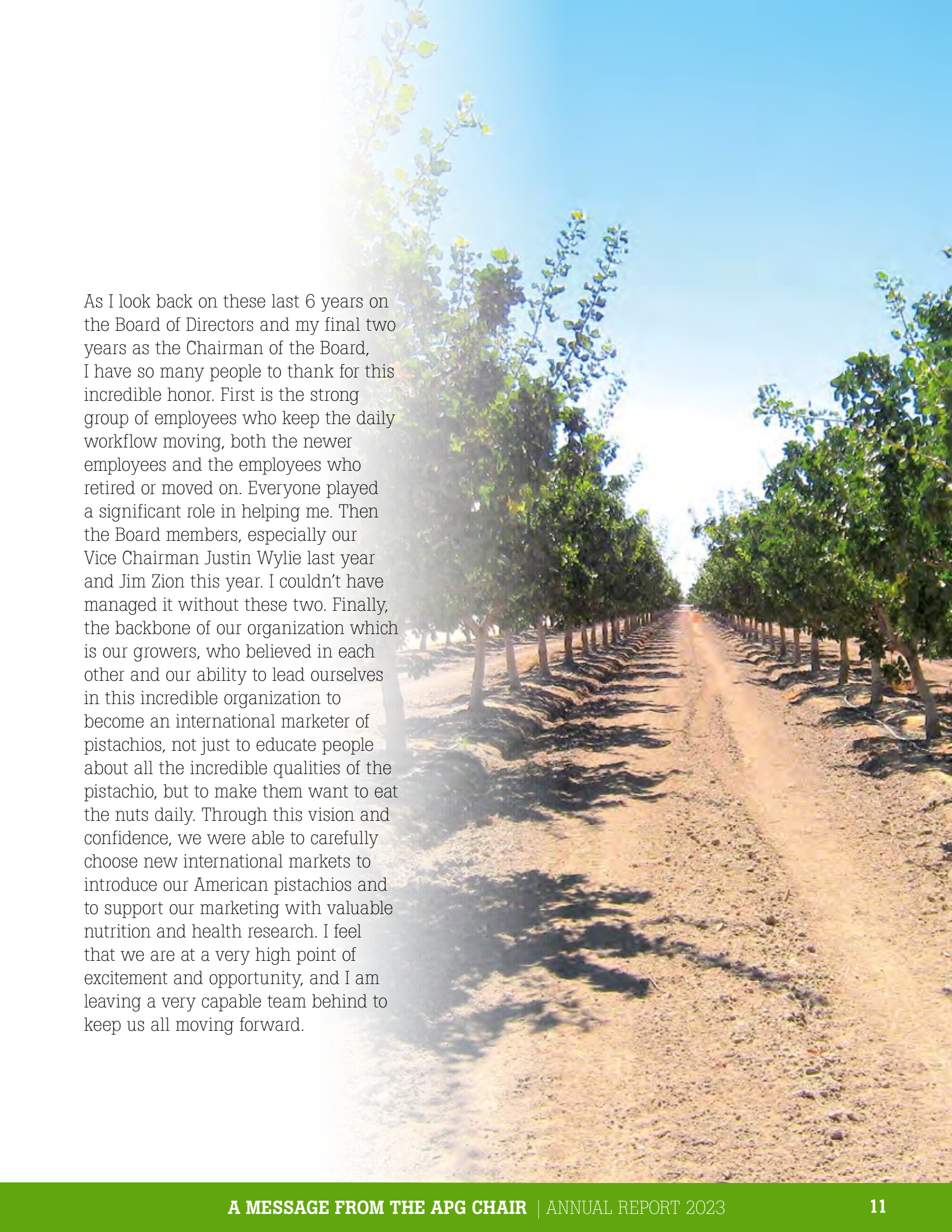


**Dennis Woods**  
American Pistachio  
Growers Chair

**Our Board has already funded a groundwater recharge project, and this is just the start of many exciting new projects to help our growers.**

Committee to develop the pistachio industry's sustainability program. Our Board has already funded a groundwater recharge project, and this is just the start of many exciting new projects to help our growers. Of course, we have many nutrition and health studies (diabetes and antioxidants) going on currently at major universities around the world which will keep APG pistachios on the front pages of media and nutrition publications. I would also like to thank Bob Schramm who retired after many years as our consultant and lobbyist. Bob helped our Board on our search to replace him with the firm Olsson Frank Weeda.



A full-page background image of a dirt road lined with young pistachio trees in a sunny orchard. The trees are planted in neat rows on both sides of the road, which stretches into the distance under a clear blue sky. The scene is bright and optimistic, with long shadows cast by the trees.

As I look back on these last 6 years on the Board of Directors and my final two years as the Chairman of the Board, I have so many people to thank for this incredible honor. First is the strong group of employees who keep the daily workflow moving, both the newer employees and the employees who retired or moved on. Everyone played a significant role in helping me. Then the Board members, especially our Vice Chairman Justin Wylie last year and Jim Zion this year. I couldn't have managed it without these two. Finally, the backbone of our organization which is our growers, who believed in each other and our ability to lead ourselves in this incredible organization to become an international marketer of pistachios, not just to educate people about all the incredible qualities of the pistachio, but to make them want to eat the nuts daily. Through this vision and confidence, we were able to carefully choose new international markets to introduce our American pistachios and to support our marketing with valuable nutrition and health research. I feel that we are at a very high point of excitement and opportunity, and I am leaving a very capable team behind to keep us all moving forward.

## AMERICAN PISTACHIO GROWERS

# BOARD OF DIRECTORS



### **ALI AMIN**

**Primex Farms**, Los Angeles, California

Email: [ali@primex.us](mailto:ali@primex.us)

Ali Amin is a fourth-generation pistachio grower and the founder of Primex International Trading, a trader and exporter of dried fruits and nuts, and Primex Farms, a pistachio processing facility. He manages over 5,000 acres of pistachio orchards in California and is passionate about the pistachio industry. He has served in various leadership positions in the industry, including past Marketing Committee Chair of the California Pistachio Commission. He is currently serving as the president of the California Pistachio Export Council (CPEC). Ali was elected to the APG Board of Directors in 2019 and serves as the Chair of the APG Marketing Communications Committee.



### **JAMIE BLEDSOE**

**Golden Genes, Inc.**, Riverdale, California

Email: [ggenes.jb@gmail.com](mailto:ggenes.jb@gmail.com)

Jamie Bledsoe's family operates farms in Riverdale where they grow almonds, wine grapes and pistachios. Additionally, they are involved in a partnership, farm management and custom harvesting of pistachios. In the past Jamie has served as a director and chairman of school boards, Western United Dairymen, and as a director for California Dairies, Inc. Jamie was elected to the APG Board of Directors in 2020 and serves as the Chair of the APG Government Policies and Partnerships Committee.



### **WILLIAM BOURDEAU**

**Harris Farms**, Coalinga, California

Email: [williambourdeau@harrisfarms.com](mailto:williambourdeau@harrisfarms.com)

William Bourdeau is a fifth-generation Central Valley native, born and raised in Coalinga, California. He has been around farming his entire life and currently works for Harris Farms overseeing 15,000 acres of diversified crops including 1,000 acres of pistachios. He received his degree from California State University, Fresno and an MBA from the University of Nevada, Reno. He also had the immense honor of serving in the Marine Corps and is proud to be a U.S. veteran. Throughout his career in the farming industry, he has been involved in many local organizations. In addition to serving on the APG Board of Directors, he is also currently the Vice Chair of the San Luis & Delta-Mendota Water Authority, Chair of the California Water Alliance, Chair of the Business Federation of the San Joaquin Valley, Chair of San Joaquin Sun, and a Board member of the Fresno State Ag Foundation. William was elected to the APG Board of Directors in 2022 and serves on the Finance Committee.



## AMERICAN PISTACHIO GROWERS

# BOARD OF DIRECTORS



### **MIA COHEN**

**Setton Farms**, Terra Bella, California  
Email: mia.cohen@settonfarms.com

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 on the Board of Directors of the International Nut and Dried Fruit Council (INC), 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. Mia currently serves as Chair of the Nutrition Research Committee and is also a member of the APG Executive Committee, Marketing Communications Committee, and the Nominating Committee.



### **JOHN HEULER**

**A & P Ranch**, Bowie, Arizona  
Email: jheuler@apgrowers.com

John is a second-generation pistachio farmer whose family has been involved in the nut growing business since 1968. He obtained his Bachelor of Science degree in Business Administration from Pepperdine University, California in 1986 and has been involved in farming pistachios, pecans, and almonds in both California and Arizona with decades of experience in hulling, processing, and shipping products all over the world. He is an advocate of embracing research and technology which includes marketing, farming, plant nutrition, and processing to adapt to a rapidly changing world. John was elected to the APG Board of Directors in 2023.



### **PAUL HUCKABAY**

**Keenan Farming Company**, Avenal, California  
Email: paul@keenanfarms.com

Paul Huckabay has 34 years of experience in fresh produce sales and sales management, and for the past seven years has served as Vice President of Sales for Keenan Farms, Inc. He has gained tremendous knowledge throughout his career and is most proud of his ability to effectively communicate with people, build consensus, and create strong and productive teams who work extremely well together. In addition to his professional experience, Paul has been very involved in his local Visalia Breakfast Lions Club where he has served as a Board Member and President and was a mentor for PMA's Foundation for Industry Talent Program. Paul was elected to the APG Board of Directors in 2022 and serves on the Marketing Communications Committee.

## AMERICAN PISTACHIO GROWERS

# BOARD OF DIRECTORS



### **RAJ KAHLON**

**Kahlon Family Farming, LLC** and RHM Farms, Merced, California

Email: [raj@rajkahlon.com](mailto:raj@rajkahlon.com)

Raj Kahlon has farmed pistachios, almonds, walnuts, and grapes in the Merced, Tracy, and West Sacramento area for over 26 years. He is very passionate about pistachios and wants to help growers be their best and help ensure the future success of pistachios. Raj believes so strongly in the work of APG that he has hosted membership events highlighting APG marketing efforts in export markets, most notably, India. His knowledge of the Indian market is very beneficial in the expansion of exports in the region. Raj's passion extends beyond pistachios, as he also feels strongly about giving back to his local community and has generously provided funding for a new Agricultural and Industrial Technology complex on the Merced Junior College campus. Raj was elected to the APG Board of Directors in 2022.



### **RICH KREPS**

**Lark Farms, Madera, California**

Email: [rkreps@ultragro.net](mailto:rkreps@ultragro.net)

Rich Kreps is a Certified Crop Advisor, Sustainability Specialist, and member of the Central California section of CCA's. Rich and his wife Lee farm 40 acres of pistachios on the east side of Madera, California as well as an additional two acres of figs, grapes, stone fruit, apples, pears, citrus, pomegranates, and even jujubes to better understand and experiment with agronomy and nutrition. Rich is a 2015 APG Leadership program graduate and was elected to the APG Board of Directors in 2020. He currently serves as the Board Secretary/Treasurer, Chair of the Membership Services Committee, and is a member of the Executive Committee.



### **ADAM KUSMAK**

**Tularosa Pistachio Groves, Tularosa, New Mexico**

Email: [akusmak@tularosa.net](mailto:akusmak@tularosa.net)

Adam Kusmak has grown pistachios with his family in New Mexico since 1990, while also attaining both his bachelor's and master's degrees at New Mexico State University in Agriculture Economics. He has also participated as an Associate Member of the Arizona Pistachio Association. Lifelong learning is one of Adam's passions, as demonstrated by his attending the UC Davis Pistachio Short Courses, participating in the 2011 APG Leadership program, and APG media training. His family recently planted new pistachio trees in the Tularosa Basin. Collaborating with other stakeholders in the pistachio industry, his passion facilitates a network with current and prospective growers. Adam has served as an APG Board member in the past and was re-elected in 2022. He currently serves on the APG Government Policies and Partnerships Committee and as an alternate on the APG Marketing Communications Committee.



## AMERICAN PISTACHIO GROWERS

# BOARD OF DIRECTORS



### **ASHA MUNGER**

**Munger Farms**, Delano, California

Email: [asha.munger@mungerfarms.com](mailto:asha.munger@mungerfarms.com)

Going back to Asha's roots in India, three generations of her family have been in farming. Her family purchased their first pistachio orchard in 1986. Now they grow, harvest, process, and directly market pistachios and blueberries. In addition, they grow almonds, olives, wine grapes, and hazelnuts. As a third-generation farmer, Asha has been working in the family business for more than nineteen years. She received her degree in Business Administration with an Option in Leadership Management at Fresno State University as well as recently completing her certificate from the IFPA Executive Leadership Development Program at the Cornell SC Johnson College of Business. Her current role as the Senior Director of Corporate Services is expanding as she is transitioning to becoming the lead executive administrator for the company. Asha is a 2015 APG Leadership graduate and was elected to the APG Board of Directors in 2020.



### **JOEL PERKINS**

**Double J Farms**, Tulare, California

Email: [jperkins@horizonnut.com](mailto:jperkins@horizonnut.com)

A graduate of California State University, Fresno in Business Administration, Joel spent the first nine years of his career working as a CPA in Fresno. In 2005, he began working for an almond handler in Five Points as a Controller, soon transitioning to General Manager and CEO. Leaving the almond industry in 2016, Joel then spent a year as a domestic trader of almonds, pistachios, walnuts, and hazelnuts. In 2017 he joined Horizon Nut Company as CEO.



### **RUDY PLACENCIA**

**Touchstone Pistachio Company**, Fresno, California

Email: [rudy.placencia@touchstonepistachio.com](mailto:rudy.placencia@touchstonepistachio.com)

Rudy has spent the last 11 years in the Food and Agricultural industries and has worked for Borges International Group, Nichols Farms, and currently Touchstone Pistachio Company where he oversees the day-to-day operations of the company. He is proficient in consumer insights and marketing analytics, and is highly experienced in sales in both the domestic and export markets. Rudy has served on the APG Board of Directors since 2021. He is also serving on the Executive Committee and Government Policies and Partnerships Committee.

## AMERICAN PISTACHIO GROWERS

# BOARD OF DIRECTORS



### **KRISTI ROBINSON**

**K. Robinson Farms**, Clovis, California

Email: kristirsf@gmail.com

For as long as she can remember, pistachio trees have been part of Kristi's life. Her family moved to the Central Valley and her father began managing and developing almond and pistachio orchards. Kristi graduated from Cal Poly, San Luis Obispo with a degree in Agri-Business Marketing and has worked in agriculture in various capacities for the last 22 years. She now farms her own pistachio orchard in Western Fresno County. She is a past Board member of Ag One Foundation of Fresno State, and past President of the Junior League of Fresno. She is currently a fellow of California Ag Leadership Class 53. Kristi was first elected to the APG Board in 2015 and then re-elected in 2020. She has had active roles on several APG committees, has served as Chair of the Nutrition Committee, and is currently Chair of the Leadership Committee.



### **KARUN SAMRAN**

**Bapu Farming Company**, Madera, California

Email: karun@bapu.company

Karun Samran is a Central Valley native and has spent his life working in agriculture. He earned his degree in Economics from University of California, Berkeley and came back to his family's farm business to ensure that their investment continues for years to come. Karun's family farms pistachios, almonds, and wine grapes throughout the Valley. Karun is a 2018 APG LeadOn graduate and currently is the Vice Chair of the APG Government Policies and Partnerships committee. He also serves as Chair of the new APG Sustainability Committee, is an alternate on the APG Marketing Communications Committee, and was elected to the APG Board of Directors in 2020. During his short time on the board, he has pushed APG to address sustainability concerns and formed a Sustainability Committee. In the last year, he initiated a grassroots effort to form the Chowchilla Subbasin Growers to address SGMA in his subbasin. More recently, he was elected to serve on the board for Chowchilla Water District. He believes continuing to participate in APG will provide leadership for the next generation of pistachio growers.



### **JAKE SHEELY**

**Sheely Family Farms**, Lemoore, California

Email: j.sheely15@gmail.com

Jake Sheely is a fourth-generation farmer and a third-generation pistachio farmer managing over 1,100 acres of pistachios in Kings County. In addition to pistachios, his family farms cotton, tomatoes, wheat, and garbanzo beans. Jake is a graduate of the 2014 APG Leadership program, serves on the Board of Cotton, Inc., and participated in the 2019-20 National Cotton Council "Emerging Leaders" program. Jake was elected to the APG Board of Directors in 2020 and is currently also serving as Vice Chair of the Marketing Communications Committee.



## AMERICAN PISTACHIO GROWERS

# BOARD OF DIRECTORS



### **GARY SMITH**

**Eriksson, LLC**, Visalia, California

Email: [grs@inglebyfarms.com](mailto:grs@inglebyfarms.com)

Gary is the U.S. Country Manager for Ingleby Farms and Forest, which also operates Eriksson LLC near Riverdale with 3450 producing pistachio acres and a hulling/drying and processing facility on property. He has served American Pistachio Growers in various capacities over the past 15 years, including multiple terms on the Board of Directors, and is also a past Vice Chair of the Board. Gary currently serves on the Finance Committee, the Marketing Communications Committee, and is a member of the Executive Committee.



### **DENNIS WOODS – Chair**

**Woods Family Farms**, Madera, California

Email: [dwoods@unitedsecuritybank.com](mailto:dwoods@unitedsecuritybank.com)

Dennis Woods was born and still lives in Fresno with his wife Cheryl. He graduated from California State University, Fresno, and since graduation 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 and since then has acquired 250 acres of pistachios and 300 acres of open ground. Dennis was elected to the APG Board of Directors in 2018 and currently serves as the Chair of the Board and as an ex-officio member on all APG Committees.



### **JIM ZION**

**LJL Farming, LLC**, Madera, California

Email: [jzion@meridiangrowers.com](mailto:jzion@meridiangrowers.com)

Jim Zion has been involved with APG since the beginning when the organization transitioned from Western Pistachio Association to American Pistachio Growers. He has held various roles at APG including Board member, Chairman of the Board, Chair of the Government Policies and Partnerships Committee and Marketing Committee member, as well as participated in various activities including the Miss California tour in China. He has also had the pleasure of testifying to government agencies about the importance of the American Pistachio Industry and what needs to be done to protect it. Jim firmly believes in and is 100% vested in the role and importance of APG to our industry not only in California, but other producing states such as Arizona, New Mexico, Texas and now Nevada. He feels APG is vital to building demand ahead of supply and being the voice of our industry to anyone that has influence over our livelihood. He currently serves as Chair of the Finance Committee, and is also serving on the Government Policies and Partnerships Committee, Marketing Communications Committee, and is a member of the board for the State and Federal Pistachio PAC.



# More nuts on the first shake

**Shaking more nuts off the trees at harvest is a benefit to growers, processors, and the industry.**

Now that pistachio growers have Dormex® it is possible to grow and harvest a more consistent, uniform crop—year after year.

This unique plant growth regulator works by inducing bud break. After a single application of Dormex®, leaf and bloom buds open earlier and more uniformly than before. Leaves begin producing more energy sooner to fuel growth as the blooms open and are pollinated.

**Wake Up  
Your Buds!**



## **IMPROVE YOUR BOTTOM LINE**

Harvesting more can make your entire operation more efficient. Use less labor. Streamline transportation. Improve scheduling.

## **SYNCHRONIZE POLLINATION**

A properly timed Dormex® application can help bring male and female trees into synchronous bloom for optimal pollination.

## **SHAPE YOUR TREES TO YIELD**

More uniform bud break results in new lateral shoots from secondary and tertiary buds, as well as main terminal suppression.

## **EVEN OUT ALTERNATE BEARING CROPS**

Dormex® can help even out alternate bearing years for certain crops or varieties. By opening more buds and creating more branching, it helps you get more consistent yields every year.

## **ONGOING RESEARCH WILL REFINES BEST MANAGEMENT PRACTICES**

Dormex® is continuing to invest in local research and field scale trials. The purpose is to demonstrate how best to realize the agronomic and economic benefits of using Dormex® year after year.

Contact John Meyer  
**559.545.4701** or email  
[john.meyer@alzchem.com](mailto:john.meyer@alzchem.com)  
[DormexUSA.com](http://DormexUSA.com)

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## AMERICAN PISTACHIO GROWERS

# 2023 COMMITTEES

### EXECUTIVE

Dennis Woods, Chair\*  
Jim Zion, Vice Chair  
Rich Kreps, Secretary / Treasurer  
Mia Cohen  
Rudy Placencia  
Gary Smith

### FINANCE

Jim Zion, Chair  
Jim Hering, Vice Chair  
William Bourdeau  
Stewart Fellner  
Andrew Muller  
Joel Perkins  
Gary Smith

### GOVERNMENT POLICIES AND PARTNERSHIPS

Jamie Bledsoe, Chair  
Karun Samran, Vice Chair  
Doug Anderson  
Thom Dille  
Sherry Heuler  
Kion Kashefi  
Adam Kusmak  
Larry Lowder  
Kent Naraghi  
Tim O'Neill  
Rudy Placencia  
Richard Searle  
Joseph Setton  
John Waymire  
Larry Wilkinson  
Jim Zion

### LEADERSHIP

Kristi Robinson, Chair  
Kristin Dodd

### MARKETING COMMUNICATIONS

Ali Amin, Chair  
Jake Sheely, Vice Chair  
Christine Trageser / *Open Seat*, Alternate  
Mia Cohen / Joseph Setton, Alternate  
Ahmad Foroutan / *Open Seat*, Alternate  
Rudy Hernandez / Adam Kusmak, Alternate  
Paul Huckabay / Elizabeth Keenan, Alternate  
Darwin Inman / Brian Watte, Alternate  
Charlotte Avila / Alyssa Valdez, Alternate  
Gary Smith / Sharon Roden, Alternate  
Mike Woolf / Karun Samran, Alternate  
Mark Wescott / Jeremy Blackwell, Alternate  
Kamie Munger / *Open Seat*, Alternate  
Jim Zion / Adam Orandi, Alternate  
Dennis Woods  
CPEC Representative, Bob Keenan

### MEMBERSHIP SERVICES

Rich Kreps, Chair  
Sharon Roden, Vice Chair  
Steve Burcham  
Bob Engleman  
Jeff Gibbons  
Sherry Heuler  
Monica Hopwood  
Rebecca Kaser  
Elizabeth Keenan  
Tobin Martin  
Mike Smith  
Brian Spain  
Kirk Squire

### NUTRITION

#### (Subcommittee of Marketing)

Mia Cohen, Chair  
Gilbert Garcia, Vice Chair  
Steve Burcham  
Rick Borges  
Ahmad Foroutan  
Jean Heuler  
Drew Hoffman  
Janice Lowder  
Asha Munger / Stephen Nazaroff, Alternate  
Simi Robani  
Sharon Roden  
Gabrielle "Kiki" Sandrini  
Elise Silvester  
Lee Smith  
Patti Watte

### PISTACHIO PAC

Robert Lake, Chair  
Jimi Valov  
Jim Zion  
Dennis Woods

### SUSTAINABILITY

Karun Samran, Chair  
Gary Smith  
Justin Wylie  
Rudy Placencia  
Richard Kreps  
Joseph Coelho  
Samuel Daud  
Mike Smith  
Bob Engleman

\*Chair Woods is an ex-officio  
member of all Committees.

## AMERICAN PISTACHIO GROWERS

# REPORT OF INDEPENDENT AUDITORS

### TO THE BOARD OF DIRECTORS AMERICAN PISTACHIO GROWERS



#### **Report on the Audit of the Financial Statements**

##### *Opinion*

We have audited the financial statements of American Pistachio Growers (the "Organization"), which comprise the statement of financial position as of August 31, 2023, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Organization as of August 31, 2023, 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.

##### *Basis for Opinion*

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards (Government Auditing Standards)*, issued by the Comptroller General of the United States.

Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with the relevant

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

#### ***Responsibilities of Management for the Financial Statements***

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for 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.

In preparing the financial statements, management is required to evaluate whether there are conditions, or events, considered in the aggregate, that raise substantial doubt about American Pistachio Growers ability to continue as a going concern for one year after the date that the financial statements are available to be issued.

#### ***Auditor's Responsibilities for the Audit of the Financial Statements***

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and



*Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit 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 Organization's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

### ***Supplementary Information***

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 as a whole.

### ***Other Reporting Required by Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated November 3, 2023, on our consideration of American Pistachio Growers' internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and 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 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 3, 2023

# STATEMENT OF FINANCIAL POSITION

August 31, 2023

## ASSETS

### CURRENT ASSETS

Cash and cash equivalents	\$ 516,249
Investments	9,218,602
Dues receivable	56,257
Prepaid expenses	<u>114,516</u>

Total current assets 9,905,624

### SECURITY DEPOSIT

6,000

### PROPERTY AND EQUIPMENT, net

38,600

### OPERATING LEASE RIGHT-OF-USE (ROU) ASSETS

469,877

Total assets \$ 10,420,101

## LIABILITIES AND NET ASSETS

### CURRENT LIABILITIES

Accounts payable	\$ 965,494
Accrued expenses and other liabilities	142,352
Operating lease liabilities, current portion	<u>105,878</u>

Total current liabilities 1,213,724

OPERATING LEASE LIABILITIES, net of current portion 364,907

Total liabilities 1,578,631

### COMMITMENTS AND CONTINGENCIES (NOTE 8)

### NET ASSETS

Without donor restriction	8,799,170
With donor restriction	<u>42,300</u>

Total net assets 8,841,470

Total liabilities and net assets \$ 10,420,101



AMERICAN PISTACHIO GROWERS

# STATEMENT OF ACTIVITIES

Year Ended August 31, 2023

	Without Donor Restriction	With Donor Restriction	Total
<b>REVENUES, GAINS, AND OTHER SUPPORT</b>			
Member dues	\$ 10,861,866	\$ –	\$ 10,861,866
Grant revenue	1,400,414	–	1,400,414
Annual conference	1,034,986	–	1,034,986
Annual report	39,000	–	39,000
Golf tournament	64,005	–	64,005
Interest and dividend income	80,025	–	80,025
Unrealized gain on investments	323,440	–	323,440
Contributions	–	12,022	12,022
Total revenues, gains, and other support	13,803,736	12,022	13,815,758
Net assets released from restrictions			
Restrictions satisfied by payment of related expenses	21,128	(21,128)	–
Total revenues, gains, and other support after net assets released from restriction	13,824,864	(9,106)	13,815,758
<b>EXPENSES</b>			
Program services	13,611,453	–	13,611,453
Management and general	2,757,860	–	2,757,860
Total expenses	16,369,313	–	16,369,313
Change in net assets	(2,544,449)	(9,106)	(2,553,555)
<b>NET ASSETS</b> , beginning of year	11,343,619	51,406	11,395,025
<b>NET ASSETS</b> , end of year	\$ 8,799,170	\$ 42,300	\$ 8,841,470

AMERICAN PISTACHIO GROWERS

# STATEMENT OF FUNCTIONAL EXPENSES

Year Ended August 31, 2023

	<b>Program Services</b>	<b>Management and General</b>	<b>Total</b>
Marketing and promotion	\$ 9,872,783	\$ -	\$ 9,872,783
Salaries and wages	943,593	847,054	1,790,647
Governmental affairs	1,026,043	-	1,026,043
Annual conference expense	-	1,306,941	1,306,941
Research and development	979,587	-	979,587
Rent and office expense	314,392	224,566	538,958
Benefits	116,874	165,907	282,781
Membership retention	247,195	164,796	411,991
Annual report expense	42,701	-	42,701
Depreciation expense	12,901	9,215	22,116
Other expenses	21,128	6,131	27,259
Professional services	34,256	33,250	67,506
Total expenses	\$ 13,611,453	\$ 2,757,860	\$ 16,369,313



AMERICAN PISTACHIO GROWERS

# STATEMENT OF CASH FLOWS

Year Ended August 31, 2023

## CASH FLOWS FROM OPERATING ACTIVITIES

Change in net assets	\$ (2,553,555)
Adjustment to reconcile change in net assets to net cash from operating activities:	
Depreciation	22,116
Amortization of operating lease right-of-use assets	105,707
Unrealized gain on investments	(249,433)
Change in operating assets:	
Dues and grant receivables	354,295
Prepaid expenses	259,114
Change in operating liabilities:	
Accounts payable	(177,959)
Accrued expenses and other liabilities	49,796
Operating lease liabilities	(104,799)
Net cash from operating activities	<u>(2,294,718)</u>

## CASH FLOWS FROM INVESTING ACTIVITIES

Purchase of property and equipment	(2,879)
Purchases of investments	(11,725,106)
Proceeds from sale of investments	<u>13,646,000</u>
Net cash from investing activities	<u>1,918,015</u>

Net change in cash and cash equivalents (376,703)

**CASH AND CASH EQUIVALENTS**, beginning of year 892,952

**CASH AND CASH EQUIVALENTS**, end of year \$ 516,249

## SUPPLEMENTAL DISCLOSURE OF NONCASH INVESTING AND FINANCING ACTIVITIES:

Operating lease ROU assets obtained in exchange for lease obligations:	
Operating Leases	575,584

# GOVERNMENT POLICIES & PARTNERSHIPS COMMITTEE REPORT



**Jaime Bledsoe**  
Chair, Government Policies  
& Partnerships  
Committee



**Cadee Condit**  
APG Director,  
Government Relations

## STRATEGY

Government Relations strategy promotes and educates elected officials who shift and create public policy in California, Arizona, New Mexico, and Texas. We aim to inform decision-makers to enact sound policy for the pistachio industry. APG focuses on promotion, public relations, and consumer awareness of American-grown pistachios.



## APG'S OUTREACH

A significant component of Government Relations is creating and maintaining relationships. APG hosts several events yearly to shed light on the pistachio industry. APG hosted the first annual "Cooking with Pistachios" event in Sacramento, California. We hosted the Bi-Partisan/Bicameral Problem Solvers Caucus, and we kicked off the first ever "Cooking with Pistachios" event with a group of California State Senators and Assembly members that put good public policy ahead of partisan politics. This event was a perfect opportunity to break bread with members of the California State Legislature and showcase the value of American-grown pistachios. For this event, we focused on nutrition research. APG educated the elected officials on the health benefits of pistachios, and APG's nutrition research proved pistachios are a pure plant-based protein that combats diabetes and obesity. Every elected official walked away with a better understanding of APG and the pistachio industry.

Dr. Jasmeet Bains, AD 35, Assemblymember Juan Alanis, AD 22, and Assemblymember David Alvarez, AD 80, at APG's first Annual Cooking with Pistachios event in Sacramento, CA



## STATE HIGHLIGHTS

On September 14, 2023, the California State Legislature adjourned the first year of the 2023 – 2024 Legislative Session. With the Governor’s sign or veto deadline behind us, the first year of this Legislative Session has officially concluded with 1,170 bills chaptered and 156 bills vetoed. Below are the bills of particular interest throughout the year.

### APG’s 2023 Legislative Package

#### **AB 99 CONNOLLY**

##### **Department of Transportation: state roads and highways: integrated pest management.**

Existing law vests the Department of Transportation with possession and control of the state highway system and associated property. Existing law prohibits each state agency that has responsibility for roadside vegetation control operations on or along a roadway, including a state highway, from conducting a roadside vegetation control operation on a portion of the road for which a property owner has requested information related to the roadside vegetation control operation until certain conditions are satisfied, as specified. Status: Held in Committee

#### **AB 412 SORIA**

##### **Distressed Hospital Loan Program.**

This bill would create the Distressed Hospital Loan Program, until January 1, 2032, to provide loans to not-for-profit hospitals and public hospitals, as defined, in significant financial distress or to governmental entities representing a closed hospital to prevent the closure or facilitate the reopening of a closed hospital. The bill would require, subject to an appropriation by the Legislature, the Department of Health Care Access and Information to administer the program. The Department would need to enter into an interagency agreement with the authority to implement this program. The bill would require the Department, in collaboration with the State Department of Health Care Services, the Department of Managed Health Care, and the State Department of Public Health, to develop a methodology to evaluate an at-risk hospital’s potential eligibility for state assistance from the program, as specified. Even with that methodology, the bill would deem a hospital applying for aid

immediately eligible for state assistance from the program if the hospital has 90 or fewer days of cash on hand and has experienced a negative operating margin over the preceding 12 months. Status: Chaptered Signed into Law

#### **AB 652 LEE**

##### **Environmental Justice Advisory Committee.**

Existing law, added by the Governor’s Reorganization Plan No. 1 of 1991, creates the Department of Pesticide Regulation and authorizes the Director of Pesticide Regulation, among other things, to adopt regulations for issuing and renewing licenses and certificates for pest control operations. Existing law requires the Director, on or after January 1, 2025, to adopt rules for issuing and renewing permits and certificates for pest control operations for a three-year period. This bill would require the Department, by January 1, 2025, to establish and convene a Department of Pesticide Regulation Environmental Justice Advisory Committee, as provided, that would formally review the activities and programs under the jurisdiction of the Department, and that would provide recommendations to the Department on integrating environmental justice considerations into Department programs, policies, decision-making, and activities, and how the Department can improve its communication with communities with the most significant pesticide exposure. The bill would require the advisory committee to hold, at a minimum, quarterly meetings and to periodically post its recommendations on the Department’s internet website. The bill would also require the Department to regularly post an update on its efforts to incorporate the advisory committee’s recommendations on its internet website.

Status: Chaptered Signed into Law

**APG works closely with several agriculture entities and our lobbyist, Kahn Soares & Conway. Getting a piece of legislation through the legislative process is one component, but ensuring a harmful piece of legislation doesn't cross the Governor's desk is another component, which means "kill" the bill.**

**Legislation APG opposed and that failed in the legislative committee process:**

AB 460 (RBK)	—Fail – Interim Water Restrictions
AB 560 (Bennett)	—Fail – Ground Water Wells
AB 1563 (Bennett)	—Fail – Ground Water Wells
AB 1205 (RBK)	—Fail – Water Right Profiteering and Speculation
AB 1337 (Wicks)	—Fail – Senior Water Rights
AB 1042 (RBK)	—Fail – Treated Seed Bans
AB 849 (Garcia)	—Fail – Community Emission Reduction Program Changes
AB 985 (Arambula)	—Fail – Audit/Expire Emission Reduction Credit Bank
AB 316 (AC)	—Fail – Automation Ban
AB 99 (Connolly)	—Fail – CalTrans Pesticide Ban



Senator Brian Dahle met with APG's LeadOn Class in June of 2023. Senator Dahle is a Republican representing Senate District 1. The Senator is a small business owner and a family farmer. The Senator and LeadOn students had a robust conversation about the challenges family farms face in today's political environment.





## APG Weighed in on the 2023-2024 Budget

**Despite a \$31.5 billion record deficit, the Budget Act and associated trailer bills provide the following funds of note to agriculture:**

- \$300 million (\$250 million GGRF and \$50 million GF) to ARB for implementation of AB 617
- \$432 million (\$345 million Greenhouse Gas Reduction Fund and \$87 million General Fund) to CEC for Equitable Building Decarbonization
- \$20 million General Fund to ARB for Equitable Building Decarbonization
- \$550 million GGRF for the Zero Emission Vehicle Package, which includes:
  - \$80 million Greenhouse Gas Reduction Fund to CARB for Drayage Trucks and Infrastructure
  - \$85 million Greenhouse Gas Reduction Fund to CEC for Drayage Trucks and Infrastructure
  - \$145 million Greenhouse Gas Reduction Fund to CEC for Clean Trucks, Buses and Off-Road Equipment
- \$100 million General Fund for the Clean Energy Reliability Investment Plan
- \$75 million General Fund to ARB for the Funding Agricultural Replacement Measures for Emission Reductions (FARMER) Program
- \$25 million General Fund to CDFA for the Enteric Fermentation Incentive Program
- \$35 million General Fund to CDFA for CalFresh Market Match
- \$15 million General Fund to CDFA for Farm to Community Food Hubs
- \$8.9 million General Fund to CDFA for Healthy Refrigeration Grants
- \$5.8 million General Fund to CDFA for Urban Agriculture
- \$4.7 million General Fund to CDFA for New and Beginning Farmer Training
- \$5 million General Fund to CDFA for Organics Transition





- Removes the \$500,000 General Fund appropriation to the Labor and Workforce Development Agency for a working group on UI benefits for excluded workers
- Exempts specified activities regarding diversifying flood flows for groundwater recharge from selected notification and permitting requirements. This bill provides that the diversion of flood flows for groundwater recharge does not require appropriative water rights if specified conditions regarding the diversion are met and exempts specific projects for Colorado River water conservation agreements from CEQA. These provisions mirror the Governor's Executive Order
- Expands the California Small Agricultural Business Drought Relief Grant Program by \$25 million to cover impacts from flooding

### **Note: Farmer Funding**

The Governor's proposed budget did not include funding for the FARMER program. The FARMER program is a top priority for the entire agricultural community. APG joined a coalition of various industries and businesses in the agricultural community. The Funding Agricultural Replacement Measures for Emission Reductions Program, known as 'FARMER,' is governed by the State Air Resources Board and managed through local Air Districts. FARMER is an incentive program to reduce greenhouse gases, criteria pollutants (PM 2.5), and toxic air contaminants and meet state and federal climate goals and air quality standards.

# FEDERAL REPORT

## 2023 Political Environment in Washington, and Looking Ahead



**To state the obvious, Washington has been a complicated place in 2023. In the House of Representatives, the year started with a successful bid for speakership by Rep. McCarthy (R-CA) – a familiar figure to many pistachio producers – that was unprecedented in its complexity. The Speaker subsequently navigated efforts to avert a government shutdown and credit default. While many would have considered avoidance of those disasters a success, they planted the seeds for a subsequent effort to vacate the speakership.**

McCarthy's successor, Rep. Mike Johnson (R-LA), is navigating the same difficult underlying terrain regarding overall government funding levels and riders in appropriation. Different factions of his caucus find some of the options under consideration exceedingly toxic, and it is unclear if and how those differences can be resolved.

While the Senate approached the annual appropriations process with a greater degree of bipartisan cooperation, we end the year with a "laddered" approach to finishing this key work. That measure funded the U.S. Department of Agriculture (USDA) and several other agencies through January 19, 2023 (and subsequent action extended the date to March 1.) As of this writing, what happens next is yet to be determined. Publicly, the pace of progress seems glacial. We describe in more detail below the significant groundwork undertaken this year to further specialty crop interests. In many instances, our allies in Congress have embraced our priorities by introducing specific "marker bills" for consideration in the upcoming farm bill reauthorization. Internationally, new trade agreements in the traditional format are stymied by political realities, but we note that the Administration, through the Commodity Credit Corporation, made \$1.2 billion available to U.S. agricultural exporters to amplify and diversify export promotion efforts.



# AND OUTLOOK

## Farm Bill

Embedded in the continuing resolution to keep the government funded into early 2024 was a bi-partisan, bi-cameral extension of the expiring 2018 Farm Bill. That such an extension was necessary came as little surprise as events unfolded across the capitol. There simply was not time or certainty of resources to gain consensus on a constructive Farm Bill reauthorization. We anticipate significant activity on the Farm Bill in both the House and Senate in the first quarter of 2024 as leaders attempt to finish their work before the 2024 election season kicks into high gear.

**The Specialty Crop Farm Bill Alliance, of which APG is an active participant, published more than 100 Farm Bill recommendations and has been using the weeks since then to build support for those concepts.** In the near term, that involves recruiting members of the House and Senate to introduce “marker” bills that embody those objectives. A *sample* of those marker bills include:

Bill Number	Bill Name	Sponsors
HR 4127	Fair Access to Agriculture Disaster Programs Act	Panetta (D-CA), Cammack (R-FL), Scott (R-GA), Lofgren (D-CA), Duarte (R-CA), Langworthy (R-NY), Edwards (R-NC)
HR 4173	Advancing Automation Research and Development in Agriculture Act	LaMalfa (R-CA), Miller (R-OH), Carbajal (D-CA), Spanberger (D-VA)
HR 4739 / S 2682	Protecting America’s Orchardists and Nursery Tree Growers Act	Huizenga (R-MI), Panetta (D-CA), Warnock (D-GA), Tillis (R-NC)
HR 4838	Specialty Crop Security Act of 2023	Slotkin (D-MI), Chavez-DeRemer (R-OR)
HR 5062	The Specialty Crop Mechanization Assistance Act	Valadao (R-CA), Costa (D-CA), LaMalfa (R-CA), Panetta (D-CA)
HR 5061	The Specialty Crop Domestic Market Promotion Program Act	Valadao (R-CA), Soto (D-FL), LaMalfa (R-CA), Costa (D-CA)
HR 648 / S 176	Expanding Agricultural Exports Act of 2023	Newhouse (R-WA), Costa (D-CA), King (I- ME), Ernst (R-IA), Smith (D-MN), Collins (R-ME), Grassley (R-IA)
HR 5199	Specialty Crop Research Act	Slotkin (D-MI)

## Export Promotion (MAP and RAPP)

**Roughly seventy percent of U.S. pistachios are exported. Consequently, trade policy and export promotion are top of mind for the APG team. Among the federal programs on which we rely is the Market Access Program (MAP) which provides cost-share assistance for export promotion activities.**

HR 628 / S 176, described briefly above, is a bill to double resources available for MAP and a related program. Though congressional policy makers warn that resources will be tight, our hope is to incorporate it into the next Farm Bill.

Until then, there has been concern among export advocates that lapses in program operation would be detrimental to ongoing export development

activities. Recognizing that fact and building on a desire to amplify and diversify export promotion activities, Secretary Vilsack this Fall announced a \$1.2 billion, multi-year, Regional Agriculture Promotion Program (RAPP). Operationally, it will be similar in many ways to MAP but with emphasis on regional diversification of export promotion activities. The first Notice of Funding Opportunity (NOFO) under the program is open now, and we are working to ensure APG receives its share of support.

According to Congressional estimates, USDA Market Development programs such as MAP generate \$24.50 for every dollar invested and have helped create hundreds of thousands of jobs throughout their lifespan.



## Navel Orangeworm Appropriations

Within the stalled appropriation measure for USDA and the U.S. Food and Drug Administration (FDA), pistachio growers scored success where efforts to address Navel Orangeworm are concerned. The House Appropriations Committee continued \$10.34 million through the Animal Plant Health Inspection Service (APHIS) and allocated a million-dollar increase totaling \$4.6 million for the Agricultural Research Service (ARS) component of this work. Unfortunately, the committee-approved measure failed in three attempts to gain passage by the full House. The most recent version voted by the House included a 14.15% across-the-board cut

to all discretionary programs (except the popular WIC program) that would have brought pressure to lower funding for Navel Orangeworm.

The Senate version of the bill, which has now been bundled with others to form a 'mini-bus', also contained language supportive of our work in this area, though without articulating a level of increased funding. The challenge moving forward toward a durable solution is identifying a "topline" domestic discretionary funding for all bills that can pass muster in both bodies. Resolution of this challenge is key to progress early next year.



## Section 32 Pistachio Bonus Purchases

During calendar year 2022, USDA announced over \$40 million in pistachio purchases under what is colloquially known as “bonus buy” under Section 32 authority. Purchases under this program are used for federally-supported nutrition programs. APG is pleased to announce that USDA Agricultural Marketing Service (AMS) announced they will purchase \$37.5 million worth of pistachios for the coming year.



## U.S. Environmental Protection Agency (EPA) and Rodenticides

The EPA has proposed a nationwide program aimed at curbing the unintended effects of rodenticides on endangered and other non-target species. Though the EPA framework is not likely to supersede California state regulations, our participation in a coalition to shed light on unintended consequences presents an opportunity to encourage pragmatic, critical review and build awareness among other stakeholders.

## Federal/State Water Storage at Sites

In late December the United States Bureau of Reclamation and the Sites Project Authority of California finalized an Environmental Impact Review (EIR) and Environmental Impact Statement (EIS) for a \$4 billion project that would capture water during wet seasons and hold up to 1.5 million acre-feet of water. The project has been accelerated under a program to certify qualifying infrastructure projects for judicial review under the California Environmental Quality Act. If ultimately approved and built, the project would store enough water for 3 million households’ yearly use.

## Food Safety Modernization Act – Final Rule on Traceability

In late 2022, the FDA published a Traceability Rule which establishes recordkeeping requirements for persons who manufacture, process, pack, or hold certain foods the agency has designated for inclusion on the food traceability list (“FTL”). Included on the FTL is nut butter of all varieties, including pistachio butter. Foods on the FTL and foods that contain them as an ingredient are subject to the additional records requirements. The rule became effective early in 2023 and the compliance date for all entities is January 20, 2026.

Over the course of the year, the FDA also published a small-entity compliance guide on “Requirements for Additional Traceability Records for Certain Foods,” which provides the agency’s non-binding interpretation of the Traceability Rule.

The FDA has also published translated versions of the FSMA Final Rule and other relevant materials. These translations are available in Indonesian, Simplified Chinese, Spanish, Thai, and Vietnamese. They are intended to ensure, among other things, that employees will be able to participate in trainings in their native language, regardless of whether they speak or read English.

## Internal Kernel Discoloration

Like many specialty crops, pistachios are typically marketed according to government grade standards issued by USDA's Agriculture Marketing Service (AMS). Other operative grade standards include those developed by the United Nations Economic Commission for Europe (UNECE) and Iranian grade standards.

In 2019, an importer in China contacted AMS about discoloration appearing on the surface of each cotyledon half, and other buyers followed. A series of subsequent studies demonstrated the discoloration is not caused by insects, and there is no different nutritional or taste difference between pistachio varieties with the discoloration and those without.

Since the grade regulation requires the AMS to score discoloration as a defect, AMS contacted the Administrative Committee for Pistachios (ACP) and held subsequent meetings with industry leaders

to discuss scoring internal kernel discoloration through additional pistachio grade instructions (colloquially known as a "patch.") ACP proposed to prepare revisions to the grade standard to provide less subjectivity concerning what may and may not be graded as a "defect," and then petition AMS to amend the grade standards regulation. AMS also indicated that it was surveying pistachio buyers to inquire about the marketability of pistachios with internal kernel discoloration.

As this project moved into the latter part of 2023, ACP delayed proposing revisions to the grade standards until learning more about the feedback AMS receives from stakeholders. Moving into 2024, APG is monitoring an additional study on internal kernel discoloration, and AMS developments, to determine the need to amend the AMS grade standard and/or to educate buyers to better understand internal kernel discoloration.

## Agriculture Workforce and Immigration



Immigration and workforce issues continue to challenge many sectors of American agriculture. On June 23, Rep. Zoe Lofgren (D-CA) and Rep. Dan Newhouse (R-WA) reintroduced HR 4319, a comprehensive immigration reform measure that speaks to many of those concerns. As this publication goes to print, that measure has been cosponsored by Reps. Costa (D-CA), Simpson (R-ID), Panetta (D-CA), Valadao (R-CA), Carbajal (D-CA), Duarte (R-CA), Cuellar (D-TX), Nadler (D-NY), Correa (D-CA), Harder (D-CA), Schrier (D-WA), Spanberger (D-VA), and Slotkin (D-MI).



# Trade Overview

In 2023, the Biden Administration continued pursuing a trade policy that eschews traditional trade initiatives such as FTAs, which are congressionally approved trade agreements that include tariff reductions and other binding commitments, in favor of framework agreements. The Administration considers its approach more suited to promote workers' rights, inclusivity, and sustainability. The difficulty for trading partners is that the U.S. proposals are hard to accept without tangible tradeoffs like tariff reductions on their exports to the U.S.

This dynamic has been reflected in sparse progress in the Administration's trade initiatives, notably The Indo-Pacific Economic Framework and the Americas Partnership for Economic Prosperity, as well as increasingly vocal criticism from stakeholders and legislators.



## Indo-Pacific Economic Framework

Indo-Pacific Economic Framework (IPEF) has been the Administration's poster child to replace traditional trade agreements. It contains four pillars, with the trade module covering agriculture, along with a number of other substantive areas, but without tariff negotiating authority. A total of fourteen countries including the U.S. are current members—Australia, Brunei, Fiji, India, Indonesia, Japan, Korea, Malaysia, New Zealand, the Philippines, Singapore, Thailand, and Vietnam—with India not participating in the trade module and Canada observing. The United States Trade Representative (USTR) leads the trade pillar negotiations while the Department of Commerce leads on the other three pillars: supply chains, clean economy, and fair economy.

The parties undertook an ambitious negotiating schedule. The first session was held in December 2022, with the most recent session, the IPEF Summit, being held in advance of the APEC Leaders' week in November 2023. The Summit concluded with the three pillars led by the Department of Commerce signed or substantially completed, but the trade pillar stalled, facing opposition from both business groups on the right and labor on the left.

## America's Partnership for Economic Prosperity

If IPEF has been the poster child for the Biden Administration's trade agenda, America's Partnership for Economic Prosperity (APEP) would be its younger, less mature sibling. Announced by the White House in June 2022, USTR has characterized APEP as an initiative to foster regional competitiveness and to cooperate on a wide range of issues. It lay dormant for nearly a year and a half until the leaders of the participating countries met in Washington, DC on November 3, 2023. In addition to the U.S., the members of APEP are Barbados, Canada, Chile,

Colombia, Costa Rica, the Dominican Republic, Ecuador, Mexico, Panama, Peru, and Uruguay. Following their meeting, the leaders tasked APEP trade ministers to "immediately focus on enhancing regional integration." No further details have been provided, nor has a charge been addressed that was made by Senate Foreign Relations Subcommittee Chair Tim Kaine (D-VA) that the Administration has changed the focus of APEP from negotiating text-based commitments to being a discussion "forum" on countries' shared issues.

# World Trade Organization

World Trade Organization (WTO) members have been focused on preparations for the WTO Ministerial Conference to be held in Abu Dhabi in February 2024 (MC13). Agriculture and dispute settlement, along with other issues, remain challenges to a successful outcome.

The agriculture negotiations have been stuck for years as members repeat entrenched positions, particularly as to public stockholding for food security and domestic support. New proposals have spurred some momentum, if not actual progress, and many members are pushing for action on food security, but divides remain significant, particularly between the U.S. and India.

On dispute settlement, much has been written in recent months about U.S. flexibility on the issue as USTR Katherine Tai has maintained that the U.S. does not have a specific end point in mind. However, resolution of the issue, which dates to 2019 with the U.S. blocking the appointment of Appellate Body members and rendering the dispute settlement process unworkable, seems unlikely at MC13.

## European Union

The European Union (EU) is considering two new Maximum Residue Levels (MRLs) based on environmental factors rather than WTO sanitary and phytosanitary standards (SPS). This represents a very significant change which could, in practice, compel production bound for export to essentially comply with EU environmental regulations.

Two agricultural entities (India's Maud Tea and Seed Company and the Fresh Produce Consortium of Kenya) have brought a lawsuit before the European Court to annul the regulation on the grounds that it violates the EU and WTO rules on

the scope and mandate of MRL rules. Though the pesticides in question are not used on pistachios, the precedent-setting nature of the proposal demands a response.

More broadly, on March 28, the Biden Administration and other member nations made a submission to the WTO SPC Committee taking issue with the EU's trade-restrictive processes for reviewing MRLs, highlighting the importance of using a science- and risk-based enforcement process, consistent with the SPS Agreement.

## House Select Committee on the Chinese Communist Party

In an exceedingly rare demonstration of bipartisan cooperation, the House Select Committee on the Chinese Communist Party issued 150 recommendations late in 2023 aimed at reorienting this important bilateral trade relationship. Though agriculture and some retail groups made progress in softening more problematic elements under consideration, the scope and bipartisan nature of the report emphasizes the continued fraught nature of this relationship.

APG is urging a cautious approach and emphasizing to its congressional allies the economic hazards that come with reckless retaliation.

USTR continues its review of China tariffs originally imposed under the Trump Administration. Any changes that might result from the review are speculative, as are any reciprocal actions by China, including on pistachios.



# China Decree 248

In 2021, China's General Administration of Customs (GACC) approved Decree 248 requiring facility registration for exporters. GACC subsequently launched an online self-registration portal for foreign firms exporting into China. While some market participants were able to utilize the online portal, technical difficulties thwarted many others. In addition, GACC requirements called for registrants to be recommended by a "competent authority" in their home countries. Though the FDA balked at playing the role of the "competent authority," USDA's Foreign Agricultural Service (FAS) has sought to defuse that situation by detailing staff to the FDA to conduct this work. In November 2022, the United States raised its concerns with the World Trade Organization. APG has stayed in contact with the FDA and FAS to monitor the issue and provide information on the U.S. pistachio industry.

## World Pistachio Trade Report

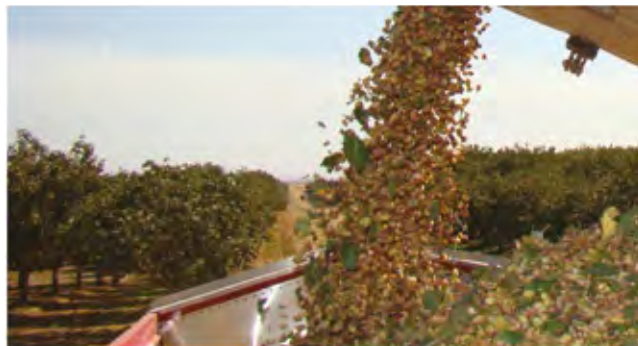
The World Pistachio Trade Report covering global imports and exports of pistachios by top-producing and consuming countries can be found on APG's website. According to the U.S. International Trade Commission, in calendar year 2022, the U.S. pistachio industry exported approximately 623.6 million in-shell equivalent pounds and imported approximately 3.8 million pounds, some of which may be of U.S. origin. Imports declined for two years in a row after peaking at 5.5 million pounds in 2020. The export figure is the second record-setting year in a row for American pistachios, with exports to China remaining high and notable increases to Europe and Turkey.

The 27 EU member states plus the UK imported a record 213 million pounds of U.S. pistachios in 2022. Europe's pistachio imports have consistently grown, surpassing China/Hong Kong by a comfortable margin of forty-four million pounds. Overall, European pistachio imports have almost doubled from 2014 to 2022; significant increases of imports by Germany, Belgium, and Spain have driven most of the growth. Germany alone imported about half the volume of pistachios that China did in 2022. Increased demand in Spain has seen imports increase from 4.2 million pounds in 2014 to 23 million pounds in 2022, but has also spurred the growth of domestic production that will eventually compete with U.S. pistachio growers.

China has imposed tariffs in retaliation to the U.S. Section 232 (and Section 301) actions. Since

February 14, 2020, the PRC tariff on raw in-shell and shelled pistachios (HS 0802.51.00 and 0802.52.00) has been 50 percent ad valorem. The existing China-applied tariff on U.S. roasted pistachios is 15 or 30 percent depending on importer classification (HS 2008.19.20 and 2008.19.99). Though exports to China/Hong Kong remain high, importing 169 million pounds in 2022, this represents a decline of 46 million pounds from the previous year and a near return to 2016 levels when the China/Hong Kong market began to grow drastically.

India's pistachio imports are significant, amounting to a total of 60.7 million pounds. U.S. exports to India increased threefold over 2021, reaching 22.3 million pounds in 2022. 2022 is the first year that the United States has overtaken Iran to be the top supplier of pistachios to India. The U.S. share of the Indian market has grown faster than the size of the Indian market itself; U.S. growers and exporters should keep India in mind as its middle class grows and demand for high-end, imported snacks like pistachios continues to grow.





# **FRONT AND CENTER FOR POLITICAL ACTION**

# UPDATE FROM THE PISTACHIO PAC CHAIRMAN



**Dr. Robert Lake**  
PAC Chairman

The American Pistachio Growers Political Action Committee (PAC) supports core elements of our association's mission. It helps advance the interests of our members, protect our industry, and increase opportunities for growers. Supported directly by you, it creates occasions to educate members of congress and ensure our priorities are "top of mind" as policy makers create legislation.

Thanks to your support, the Pistachio PAC is the largest specialty crop PAC in the entire United States. The PAC takes a long-term view by supporting both Republican and Democratic members. We do so in recognition that politics can be unpredictable (as it was in 2023) with evolving committee assignments and gavels changing hands over the years. We focus on members from pistachio-producing regions and those whose jurisdiction includes farm policy, appropriations, trade, and tax matters.

During the first half of 2024 we anticipate Congress will devote increased attention to a new Farm Bill. Our work in the legislative arena, through the Specialty Crop Farm Bill Alliance (SCFBA), the annual appropriations process, and our presence in the political space through our PAC, creates substantive

opportunities to further our mission. Through each we create opportunities to educate policy makers on issues that they may not otherwise know about.

Our annual Golf Tournament and PAC Breakfast is a cornerstone fundraising event and we are grateful for the support received for its reinstatement. Additionally, I would like to specially acknowledge those members of the PAC Presidents Club for their contributions. The Presidents Club is made up of growers that contribute the maximum amount of \$5,000 annually, another critical source of funding for the PAC. The contributions of these growers help the entire industry by increasing the PAC's ability to conduct outreach and education.

Throughout this Annual Report, you'll find a great deal of detail about APG's work. Please review it and ask questions of staff and leadership so we can more fully engage on topics most important to you. I also encourage you to review and consider the benefits and advantages received from membership with APG. I continue to urge all APG members to make an annual contribution to the pistachio PAC.

The government relations side is critical to fulfilling our objectives to promote a strong pistachio industry and good pistachio policy. Production continues to increase, so consumption and exports need to increase as well; the Pistachio PAC helps address these needs on the federal level. The PAC has helped to make the industry strong and together we can make it stronger going forward.



# APG MEMBERSHIP SERVICES COMMITTEE REPORT

## CONNECTING MEMBERS:

The 2022/2023 crop year saw continued growth and transformation for the APG Membership Services Committee. Listening to feedback from growers, APG Membership Services continued to build on the mission of connecting, informing, and educating pistachio growers, industry professionals, and future leaders. APG introduced new events for networking and education, and adopted a grassroots plan to develop new funding sources for growers interested in implementing new and innovative farming practices and on-farm research projects. APG also continues to work to get out in the community and connect growers with local restaurants and businesses that can help create new ways to utilize our favorite tree nut. As the industry grows, APG will continue to evolve and serve as the central organization connecting the entire industry and delivering crucial information and updates to all growers.



**Rich Kreps**  
Chair, APG Membership Services Committee

## Highlights From APG Membership Services Events

### September 2022

#### Pistachio Party at the Old Town Clovis Farmers Market

APG once again partnered with the Clovis Institute of Technology Culinary School to create unique pistachio-inspired treats for thousands of Central Valley residents at the Pistachio Party at the Old Town Clovis Farmers Market. Connecting consumers and local businesses with farmers that grow pistachios across the region is a great way to educate and inspire the community about the importance of supporting our members through utilizing pistachios in new ways.





### October 2022 APG Harvest Party

APG invited growers to celebrate the culmination of harvest at the beautiful home and barn of APG Members Brian and Patti Watte. Harvest is a great opportunity to connect new growers with established growers and APG members to discuss farming practices, challenges, and future outlook.

**More than ever, American Pistachio Growers would like to thank our APG Associate Members, event sponsors, and media partners that enable us to continue to carry out a piece of the mission of APG through our events. Scan the QR code below to learn more about who our APG Associate Members are. Please support them with your business as they are crucial to creating opportunities to connect the pistachio industry.**



### November 2022 Member Appreciation Tailgate

The 2022/2023 year was difficult for many growers. New challenges continue to appear, and many existing battles on the farm continued to be waged. In the fall of 2023, APG decided to connect our members in a new way to not only say thanks for all they do, but also come together to cheer each other on through both the good and tough times. In November, APG hosted an inaugural member appreciation tailgate at Valley Children's Stadium for a Fresno State Football game. Over 400 growers, their families, and staff came out to connect, enjoy pistachio-inspired food and drinks, and meet a few locally-grown and pistachio-powered ambassadors.



## February 2023 2023 Pistachio Industry Annual Conference

The 2023 American Pistachio Growers Pistachio Industry Annual Conference was one for the record books. California saw unprecedented weather events in late February that brought seemingly unending rain and snow for growers, but made travel and event prep a different experience for APG staff.

San Diego County experienced a weather event in the days leading up to and during the Annual Conference that brought over three inches of rain and rare high winds. Through it all, APG staff, speakers, and over 1,200 attendees found their way to Carlsbad for the 15th year of the Pistachio Industry Annual Conference.



The Conference included presentations on the state of the pistachio industry, APG's efforts in global marketing to continue to increase consumption, new efforts in nutrition research, global economic and consumer trends, and a motivational speech from Shark Tank's Daymond John. APG also recognized Bob Schramm, a figure in the pistachio industry for over 30 years, who announced his retirement at the Annual Conference.



## February 2023

### International Ag Expo Member Mixer

The 2023 APG Member Mixer at the International Ag Expo was bigger than ever! The International Ag Expo is the largest event of its kind, and it has become an annual tradition for APG grower and associate members to connect and discuss the upcoming season each year. 2023 saw over 250 growers and industry professionals come together for an afternoon of locally sourced food, drinks, and pistachio ice cream. In the middle of a cold and wet winter, growers were eager to connect and discuss the outlook of the 2022/2023 pistachio crop.



## July 2023

### American Pistachio Growers Annual Member Luncheon

APG grower, processor, and associate members were welcomed to Visalia, California for the Annual Member Luncheon. Members connected over lunch and presentations on the industry by APG staff, State Senator Shannon Grove, and a special interview on stage between world champion boxer Jose Ramirez, and host of the Bring the Juice podcast, Frank Dalena.



**August 2023**

## **American Pistachio Growers Pistachio Week**

APG closed out the 2022/2023 crop year while launching the 2023/2024 harvest with our Second Annual "Pistachio Week." APG partnered with ten restaurants across Central California to promote pistachios in recipes created by some of our members' favorite chefs and restaurants. Each day for a week local media focused on a different restaurant and menu item, while also highlighting what it takes for our farmers to grow our favorite healthy and delicious nut. APG looks forward to watching this event continue to grow in the future!



# **APG COMMUNICATIONS & INDUSTRY UPDATES**

## **Enews and APGov Report**

**American Pistachio Growers continues to keep our members and the industry connected and informed with the APG Enews and APGov Report distributed each month.**

These publications provide updates on what is going on across the industry, as well as important updates on ongoing training, education opportunities, events, and regulations that might impact growers and industry partners.



## APG Member Website

American Pistachio Growers continues to adapt to the needs of our growers and the entire industry through increasing the availability of resources to all growers. APG built a new website focused on connecting members with important events, education, resources, tools, and funding opportunities.

Interested in learning more about American Pistachio Growers or becoming a member? Visit the QR code below to learn more and sign up to receive communications from APG.

### Contact Us

<https://apgpower.americanpistachios.org/contact-us/>



## Delivering Value to Growers

More than ever, APG understands that the needs for growers have evolved over time. The 2022/2023 crop year created new opportunities for APG Membership Services to deliver a greater impact from the investment growers make in the organization.

APG dedicated time and resources throughout the year to help growers access funding to implement best practices on their farms. APG worked with the California Department of Food and Agriculture (CDFA) to better connect pistachio growers with funding available through the Healthy Soils Program (HSP) and State Water Energy Efficiency Program (SWEET). New programs through CDFA and the United States Department of Agriculture (USDA) are being rolled out to growers across the country. APG is committed to helping growers learn more about these programs and the funding opportunities available.

American Pistachio Growers is excited for special announcements on opportunities for growers to implement Healthy Soils Program practices, as well as on-farm research projects focused on healthier soils, better production, and reducing inputs.

**To learn more about these programs and what APG is doing to help connect growers to these practices please scan the QR code below.**



## APG MEMBERSHIP SERVICES COMMITTEE MISSION STATEMENT

The Membership Services Division of American Pistachio Growers aims to connect, inform, and educate pistachio growers, industry professionals, and future leaders on regulation and policy changes, pistachio growing tips and recommendations, and industry related events. APG strives to connect the pistachio community through various events, educational opportunities and award-winning communications. American Pistachio Growers Membership Services actively engages 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, the local community, and industry professionals.

# AMERICAN PISTACHIO GROWERS SUSTAINABILITY COMMITTEE

To better meet the needs of growers, processors, marketers, and industry partners in an evolving global climate, APG introduced a new grower-led Committee during the 2022/2023 crop year. The APG Sustainability Committee is comprised of growers and processors that are focused on defining what the words sustainability, regenerative, organic, and stewardship mean to the pistachio industry and consumers around the world.

The Sustainability Committee is focused on connecting pistachio growers with information that will impact growers on their farms with the product they send to processors and eventually ends up with consumers around the globe. Many key markets now require information and evidence related to measures being taken to combat climate change, improve soil health, and reduce inputs on crops that consumers eat.

Though there are many great research organizations working on behalf of the industry, there are many holes being uncovered each day that must be addressed. The APG Sustainability Committee is committed to investing in research and connecting growers with education and providing awareness to purchasers around the globe on key areas including, but not limited to:



**Groundwater Recharge**



**Cover Crop Impacts**



**Carbon Amendments**



**Compost Application**



**Technology Adaption to Reduce  
Overspray**



**Grazing**





SEAMAN NURSERIES LLC

*quality pistachio trees  
since 1982*

# LOOKING FOR PISTACHIO TREES ?

FOR OVER 40 YEARS SEAMAN NURSERIES HAS  
PRODUCED QUALITY PISTACHIO TREES.

## **Clonal Platinum Pistachio Trees**

More Vigorous • More Salt Tolerant • High Yielding

## **Clonal UCB-1 Pistachio Trees**

Very Uniform • High Yielding

Seaman Nurseries proudly offers **UCB-1 & Platinum**  
Clonal Budded Trees in the following varieties:

**Golden Hills • Randy • Lost Hills**

**Peters • Kerman • Famoso**

## **CONTACT US**

**Tanya McClure** | 559.999.0534

**Wyatt Seaman** | 559.223.0272

**Bill Seaman** | 559.706.2683

**Office** | 559.665.1860

[tanya.seamannurseries@gmail.com](mailto:tanya.seamannurseries@gmail.com)

# LeadOn

AMERICAN PISTACHIO GROWERS LEADERSHIP PROGRAM



Assemblymember Heath Flora welcomes the LeadOn participants in the State Assembly Chambers



**Kristi Robinson**  
Chair, LeadOn

**APG concluded another successful LeadOn program year. Finishing our eleventh year, this ever-evolving leadership training program was developed to educate and motivate diverse industry members into becoming future leaders of the U.S. pistachio industry and American Pistachio Growers.**

LeadOn participants are chosen from applications submitted in March of each year. The program is designed for participants to gain industry knowledge and hands-on training to prepare them for essential voluntary leadership roles with American Pistachio Growers. They are introduced to multiple facets of the American pistachio industry and educated on the active, important role that APG, its committees and board play in promoting the industry's prosperity and growth. Strong connections are formed with fellow classmates that will follow them throughout their farming future.

This is our largest class to date, with 24 participants. The class had a great tour at Safe Food Alliance, where they learned about the ethical, moral, legal, and financial issues regarding food safety in the pistachio industry. During the California Capital Tour, we had a great meeting with Assemblymember Heath Flora, from Manteca, on the State Assembly floor. The class also met in small groups with elected officials in their offices to discuss the challenges facing the pistachio industry today.

With a commitment to being a self-funded program, we continue to expand and



grow through donations and fundraising events. Thanks to generous sponsorships and contributions, we are able to offset 100 percent of costs for this program. Thank you for supporting our LeadOn mission to develop the future leaders of the pistachio industry and American Pistachio Growers.



UCCE Farm Advisor Emeritus, Bob Beede, explains the importance of watering and how it impacts production.



California Department of Agriculture Undersecretary, Christine Birdsong, addresses LeadOn group in Sacramento.



APG's Vice President, Global Marketing, Scott Fryer, teaches the class about APG Global Marketing efforts.



AMERICAN PISTACHIO GROWERS LEADERSHIP PROGRAM

## CLASS OF 2023:

Mindy Cunha	P Cunha Farms
Phillip Cunha	P Cunha Farms
Yazmin DeLeon	Horizon Nut Company
Adrian Diaz	Chandler Automation
Amarinder Dosanjh	Doaba Farming
Karandeep Gill	Prestige Ranch LLC
Carolyn Gleason	West Hills Farm Services
Matthew Guzman	Sol Aureus Farms
Martin Herrera	California Ag Solutions
Udhay Kahlon	RHM Farms
Mitchell Keenan	Keenan Farms
Matthew Malcolm	Pacific Nut Producer
Amir Pars	Primex International
Julio Ramos	Setton Farms
April Ramos	Touchstone Pistachio Company
Jonathan Romero	Laborde Land Co LLC
Scott Schuil	Schuil Ag Real Estate
Jason Searle	Searle Ranch
Brandon Spain	Manulife Investment Management Farmland Management Services
Holly Sylvester-Lopez	Horizon Nut Company
Chase Thomas	Ultra Gro
Hector Vaca	M&E Vaca Farms
Jimi Valov	Valov Brothers Farms
Tyler Zion	Meridian Growers



## A Family Legacy Since 1972.

As a family business with more than five decades of experience, we understand that growing pistachios is both a passion and a livelihood. As a dedicated pistachio grower, you deserve a partner who not only shares your enthusiasm but also provides exceptional services to maximize the value of your crop. Look no further ~ we're here to help you cultivate a thriving future.



Interested in growing with us? Please contact:  
Keenan Farms Grower Relations Manager, Zack Raven,  
at (559) 240-5508 | [zraven@keenanfarms.com](mailto:zraven@keenanfarms.com).

**KEENAN FARMS, INC.**  
31510 Plymouth Ave | Kettleman City, CA 93239  
Tel: (550) 945-1400 | Fax: (559) 945-1414  
[keenanfarms.com](http://keenanfarms.com)



## Marketing Communications

With a recent transition of leadership, APG Marketing Communications will continue to build on the strong foundation of driving awareness and demand for pistachios in the global markets. With supply increasing to unprecedented levels, it is critical that we continue to support our pistachio industry and educate consumers about the remarkable nutritional benefits that pistachios offer. To all of our growers – thank you for your contribution to our organization. It is because of you that we can drive demand and push this industry forward.



**Ali Amin**  
Chair, Marketing  
Communications  
Committee



**Scott Fryer**  
VP Global Marketing

## Nutrition Research Subcommittee

Nutrition research is the foundation for all marketing and communications at APG. The Nutrition Research Committee collectively decides how to allocate research funding by considering the unique health attributes of pistachios, global consumer health trends, and current gaps in pistachio nutrition research. To date, 78 studies on the health benefits of pistachios have been published with more than 10 additional studies in the pipeline. As the pistachio crop continues to grow, it is more important than ever that we work to uncover new, science-backed reasons for consumers across the globe to eat more pistachios.



**Mia Cohen**  
Chair, Nutrition  
Committee



**Amber Wilson, MS, RD**  
Director, Nutrition  
Research & Communication

# APG'S GENERIC MARKETING COMMUNICATIONS PROGRAMS INCREASE DEMAND FOR U.S. PISTACHIOS.

HERE IS THE FOUR-STEP  
PROCESS WE FOLLOW.

01

NUTRITION RESEARCH

02

ANNOUNCE POSITIVE RESEARCH FINDINGS

03

EDUCATE WITH:

- ✓ PUBLIC RELATIONS & ADVERTISING
- ✓ HEALTH PROFESSIONAL OUTREACH

04

- ✓ CHANGE CONSUMER BELIEFS
- ✓ INCREASE CONSUMER AWARENESS



# NUTRITION RESEARCH:

The foundation  
for all marketing  
communications.



APG funds and publicizes scientific research around the world that proves American-grown pistachios are valuable for their health benefits.

It's a scientific fact that YOU grow healthy & nutritious American-grown pistachios.

APG Funding Has Led to **78**  
Published Studies on the Health  
Benefits of Pistachios.

- ✓ 54 specific to pistachios
- ✓ 24 published in conjunction with INC's Nutrition Research & Education Foundation (NREF)
- ✓ **10 additional studies are underway**



# AS A RESULT OF OUR NUTRITION

Pistachios are a  
**COMPLETE  
PROTEIN**

just like meat, fish  
and eggs.

For people following a  
plant-based diet, this  
news is groundbreaking.



Pistachios are high in  
**ANTIOXIDANTS.**

In fact, they rival the  
levels of antioxidants in  
common powerhouses  
like blueberries,  
pomegranates and  
red wine.

Antioxidants can help  
prevent aging (wrinkles!)  
and chronic disease.



# RESEARCH, WE KNOW THAT...

People on a  
**WEIGHT LOSS**  
plan can eat pistachios as a  
snack and still lose weight.



Pistachios may help blunt  
blood glucose spikes in  
pregnant women with  
**GESTATIONAL  
DIABETES.**



Pistachios can help lower  
blood glucose and insulin  
in people with  
**PREDIABETES.**



Eating pistachios may help  
reduce risk factors for  
**HEART  
DISEASE.**

# WITH MORE THAN **70%** OF EXPORTED, GLOBAL DEMAND

Standing on the foundation of scientific research, APG's marketing communications programs promote health benefits of pistachios in creative and targeted ways that increase demand in our prioritized export markets.



## APG's strategic export markets

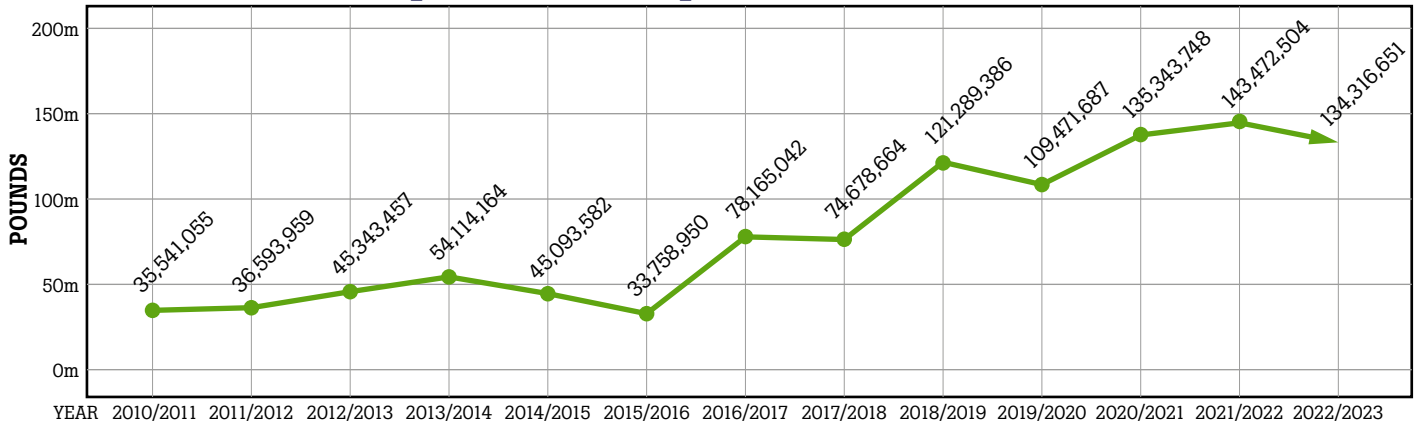
- ▶ China/Hong Kong
- ▶ France
- ▶ Germany
- ▶ India
- ▶ Italy
- ▶ Mexico
- ▶ South Korea
- ▶ Spain
- ▶ United Kingdom



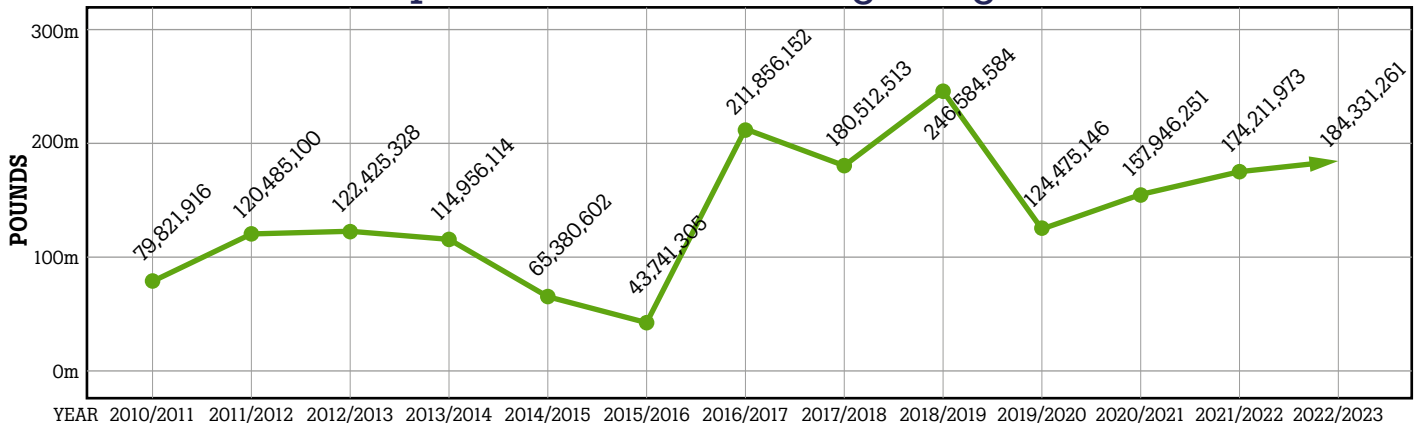
# ALL U.S. PISTACHIOS BEING CONTINUES TO GROW!

## US Pistachio Exports to Europe

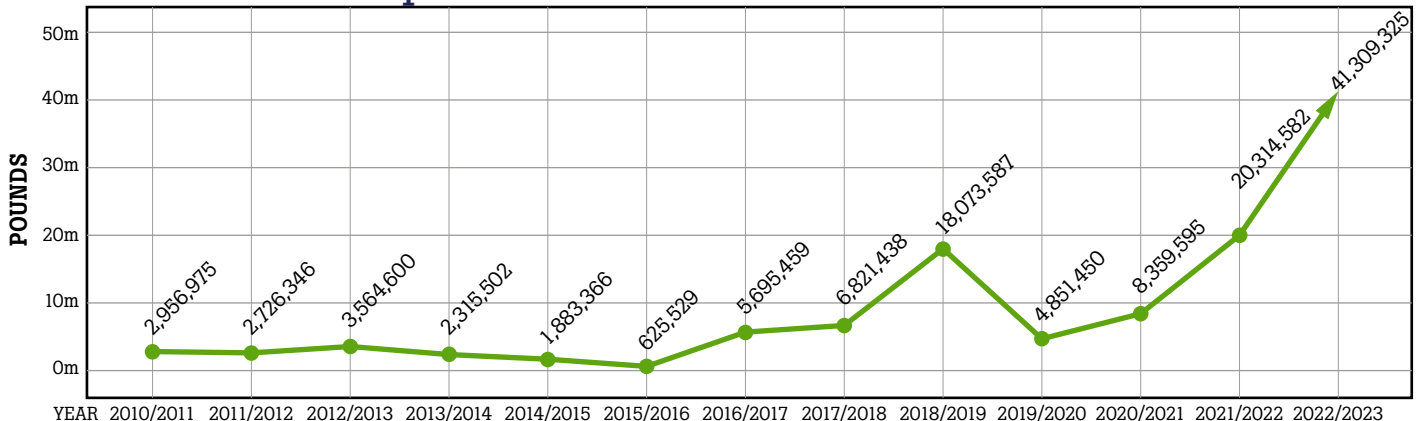
Germany, France, Italy, Spain, and United Kingdom



## US Pistachio Exports to China & Hong Kong



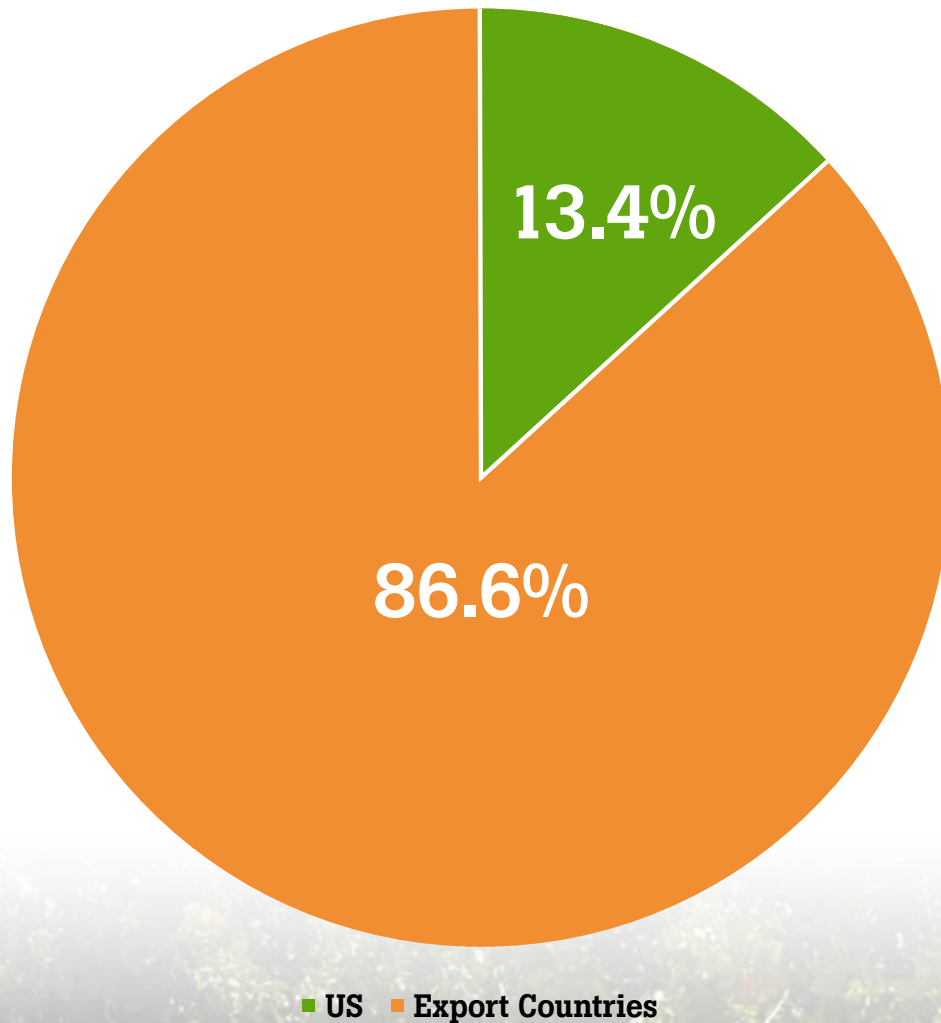
## US Pistachio Exports to India



Data source: Administrative Committee for Pistachios (ACP)

# APG IS MARKETING

% of APG Marketing Spend



\*Represents Working \$



# WHERE THE GROWTH IS

U.S. Pistachio Sales (Domestic vs. Export)



# THIS IS WHAT WE DO AND HOW WE DO IT!



**COMPETE FOR FEDERAL AND STATE GRANTS**



**CONDUCT PUBLIC RELATIONS ACTIVITIES  
(SUPPORTED BY AMBASSADORS AND INFLUENCERS)**



**ADVERTISE VIA PRINT, BILLBOARDS  
AND PUBLIC TRANSIT**



**PROMOTE ON MAJOR TV AND DIGITAL  
PLATFORMS**



**EDUCATE HEALTH PROFESSIONALS**



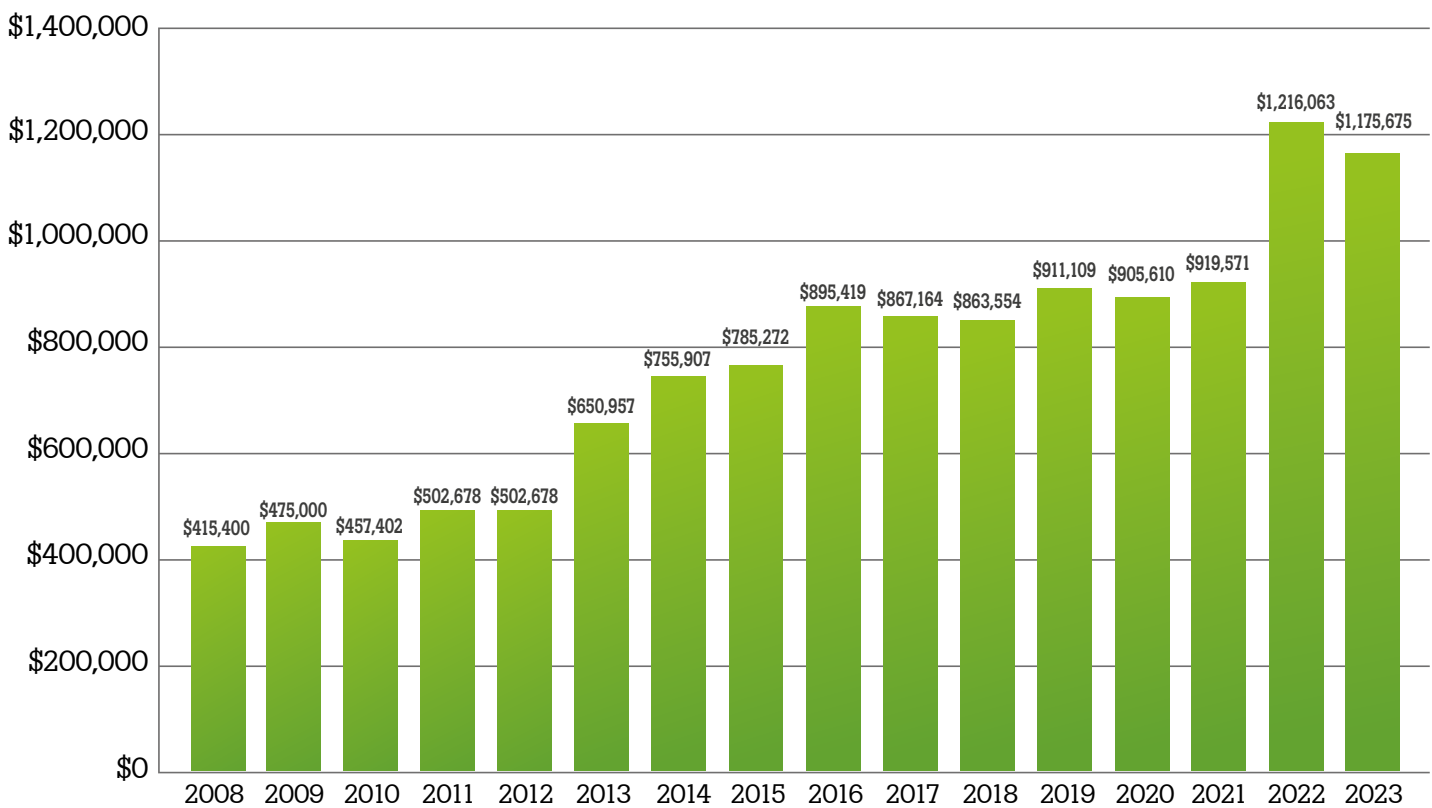
**SUPPORT TRADE COMMUNITY  
(IN-STORE AND ONLINE PROMOTIONS)**



# APG COMPETES FOR FEDERAL & STATE GRANTS

**\$14,138,600** was secured from  
**2008 through 2023** to augment APG assessment  
dollars and BUILD DEMAND FOR American pistachios in export markets.

## MARKET ACCESS PROGRAM (MAP) AWARD INCREASED +183%



# GENERIC MARKETING GENERATES PUBLICITY!

**APG has great success pitching media and generating placements because we are a generic entity with no particular brand to promote.**

By offering spokespeople who are researchers, athletes, nutrition experts, and our own growers, engaging interviews are turned into print articles, television and radio interviews, and online content that lives on the internet forever.

**OVER THE PAST YEAR OUR  
PR EFFORTS GENERATED:**

**\$229 MILLION+** In Media Value

**18 BILLION+** Views

**5,128** Articles & Broadcasts



# APG'S GENERIC PUBLIC RELATIONS EFFORTS ENCOMPASS THESE ACTIVITIES

## Ensuring Pistachios are in the News



### The #1 Snack for Weight Loss When You Have Diabetes, According to a Dietitian

Nothing on this nut could help control blood sugar and bring down the number on the scale.

By Lauren Merilino, M.S., RD, LD, CLS, CDE. Published on June 19, 2023.  
Reviewed by Dietitian Emily Lechman, M.S., RD.

### The #1 Snack for Weight Loss When You Have Diabetes

Opting for something that naturally contains fiber, antioxidants, healthy fats and plant-based protein is your best bet if you're looking for a weight-loss and diabetes-friendly snack. And a serving of pistachios checks all of these boxes, and more.

For starters, 2023 data published in *Nutrients* shows that people living with diabetes who eat more nuts in general have lower fasting serum glucose levels than those with a lower nut intake.

That's why diabetes guidelines recommend dietary patterns that incorporate nuts, like pistachios. A study conducted by Cornell University researchers and published in the journal *Nutrients* found that pistachios have a high antioxidant capacity. In fact, their levels rival those of other popular antioxidant-containing foods, including blueberries, pomegranates and cherries.

But pistachios aren't only a source of antioxidants. They are one of the very few antioxidant-rich foods that are also a complete protein—meaning they have all nine essential amino acids normally found in animal-based proteins. So they're a perfect choice for people looking to eat more plant-based foods.

EatingWell

## Diversifying Pistachio Consumption



## Educating Consumers



## Connecting with the Health Professional Community



# BELOW ARE SAMPLES OF MEDIA COVERAGE



## GERMANY



## ITALY



## SPAIN



## UNITED KINGDOM



## IN APG-PRIORITIZED COUNTRIES



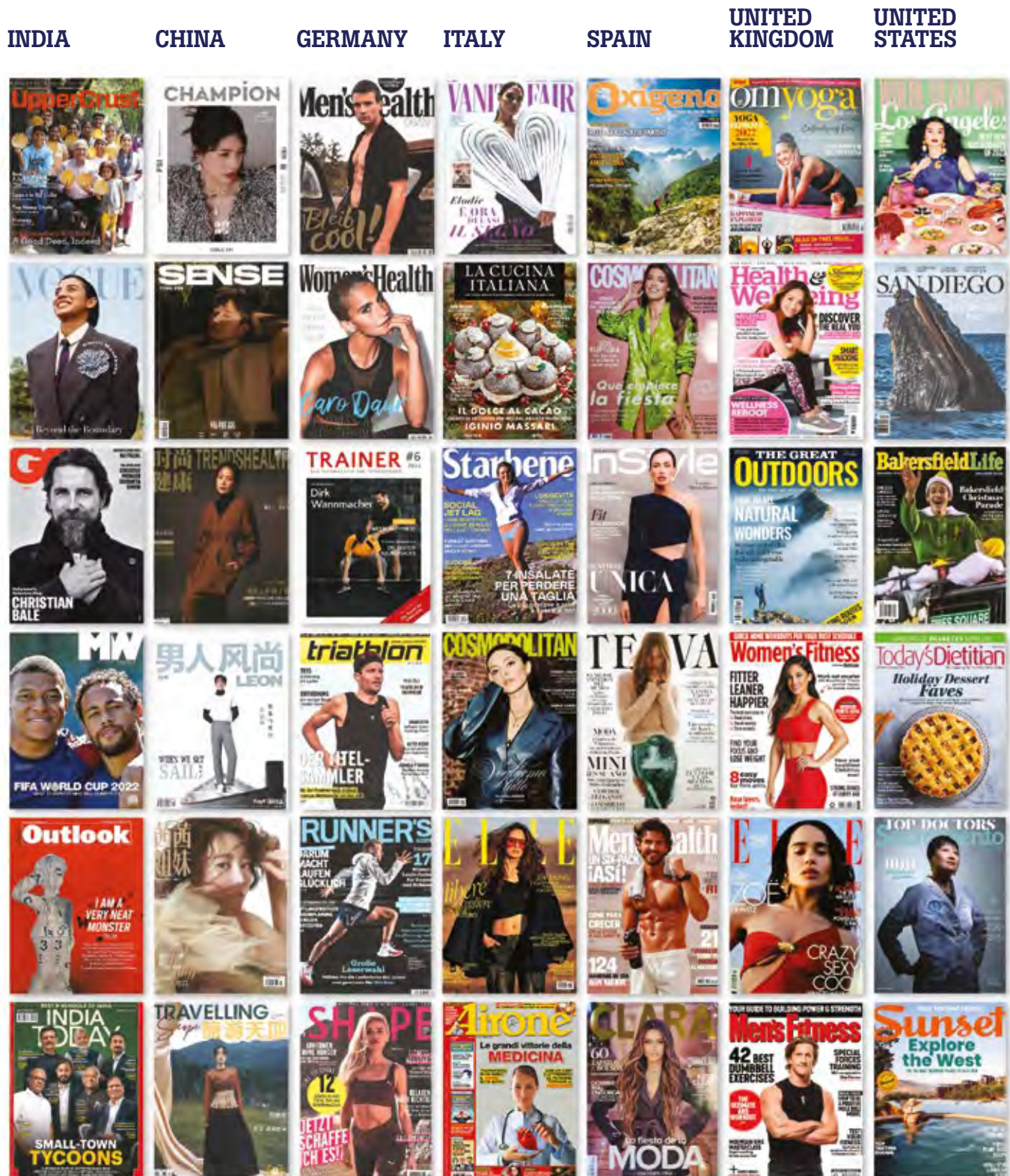
# WE ADVERTISE VIA MAGAZINES,



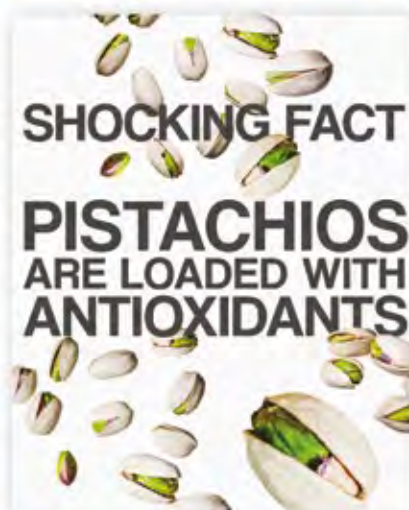
# BILLBOARDS & BUSES



# APG'S ADS ARE SEEN WORLDWIDE IN PHYSICAL AND DIGITAL PUBLICATIONS



# WE CONNECT WITH CONSUMERS VIA TV, DIGITAL & SOCIAL MEDIA

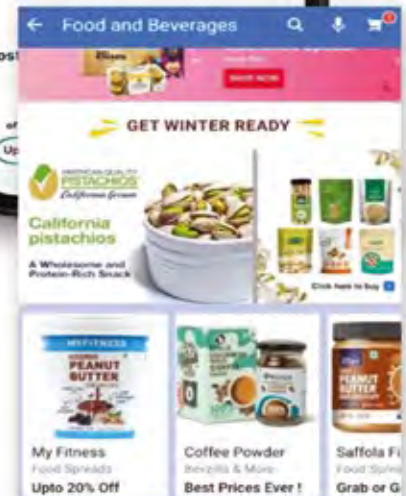


# APG SUPPORTS RETAIL PROMOTIONS GLOBALLY

## ► In-store



## ► Online



# APG EDUCATES HEALTH PROFESSIONALS



**80,000+**  
HEALTH PROFESSIONALS  
REACHED



**14** CONFERENCES  
ATTENDED  
GLOBALLY LAST  
YEAR

**NEW STUDY REVEALS PISTACHIOS ARE AN ANTIOXIDANT POWERHOUSE**

- A new study conducted by Cornell University, and published in the journal *Nutrients*, found that pistachios have a high antioxidant capacity.
- In fact, the antioxidant capacity of pistachios rivals that of popular antioxidant-containing foods, including blueberries, pomegranates, cherries and red wine.
- Researchers used 2 methods of measuring antioxidants: the accepted measurement established by the United States Department of Agriculture, called ORAC, which stands for Oxygen Radical Absorbance Capacity; and CAA, short for Cellular Antioxidant Activity, which is a new method that looks more closely at what might happen with cells in the human body.
- Pistachios are also a good source of complete protein. Perfect for those looking to follow a plant-based diet.

To learn more about the study click here

Oxygen Radical Absorbance Capacity (ORAC)

Cellular Antioxidant Activity (CAA)

DOWNLOAD THE INFOGRAPHIC

Health Professionals Toolkit

Sign up to receive our quarterly newsletter for the latest on pistachios' research and mouth-watering recipes.

CLICK HERE

HEALTH BENEFITS

For more information on the health benefits of pistachios

CLICK HERE

# APG ADVERTISING IS WORKING!

A recent national online survey showed how consumers learned about the health benefits of pistachios. Their top responses were:

#1

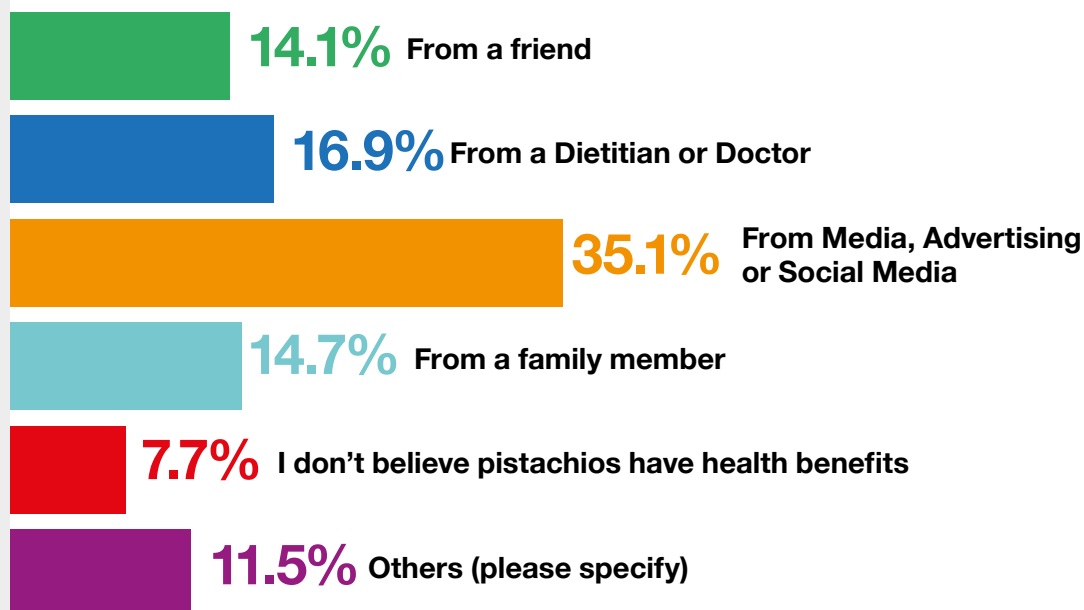
Media, Advertising  
or Social Media

#2

From a dietitian  
or doctor

510 People Surveyed:

Where did you learn that pistachios had health benefits?



Source: Online national consumer survey. Survey mimics U.S. Census for adults age 18+. 510 total responses, random selection amongst pistachio consumers.



# APG MESSAGING IS WORKING!

All of the pistachio benefits are resonating with consumers.

#1

Protein

#2

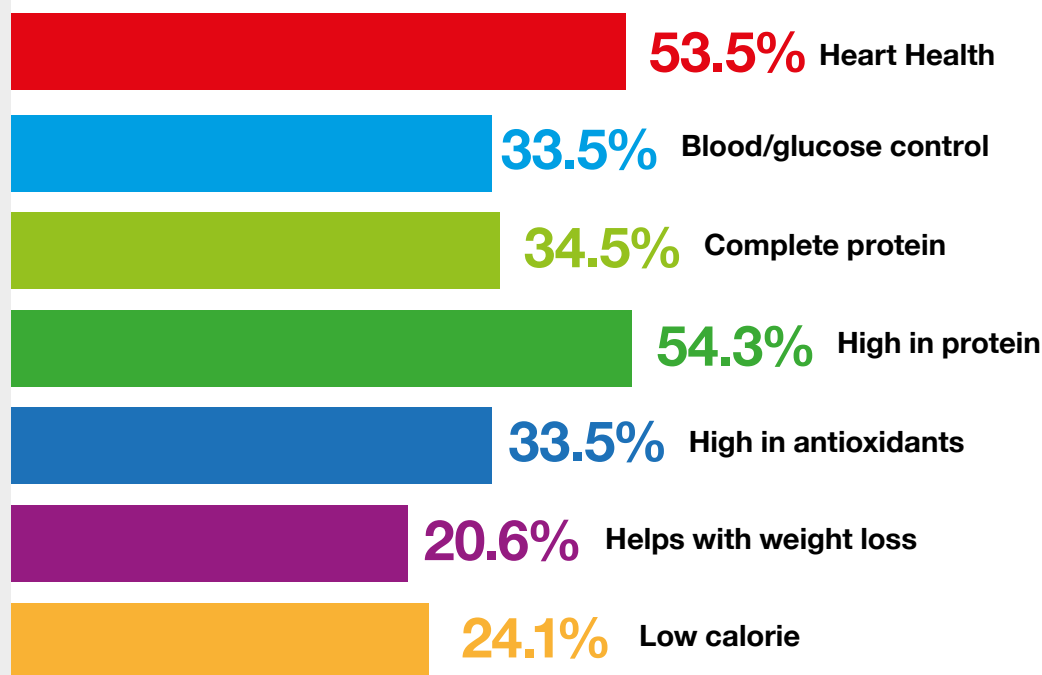
Heart Health

#3

Antioxidants &  
Blood/Glucose Control

510 People Surveyed:

Which health benefits do you think you can get from pistachios?



Source: Online national consumer survey. Survey mimics U.S. Census for adults age 18+. 510 total responses, random selection amongst pistachio consumers.

# APG VALUE TO

Keeping the growers top of mind is important for APG. That is why we have developed a way to show you what we do for you and your bottom line.

## APG Activity

## Last Year

*Total \$ Assessments*

*\$10.7 million*

Government Funding Secured (MAP)

**\$1.2 million**

Caltrans Weed Abatement Avoided

**\$18 million (~\$40/acre)**

Pest Pressure Measure Avoided

**\$36 million (~\$90/acre)**

Mandated Equipment Purchase Avoided

**\$17 million (\$20K X ~865 growers)**

**TOTAL Value Returned  
to Growers**

**\$80 million**

Effective Legislative  
Education

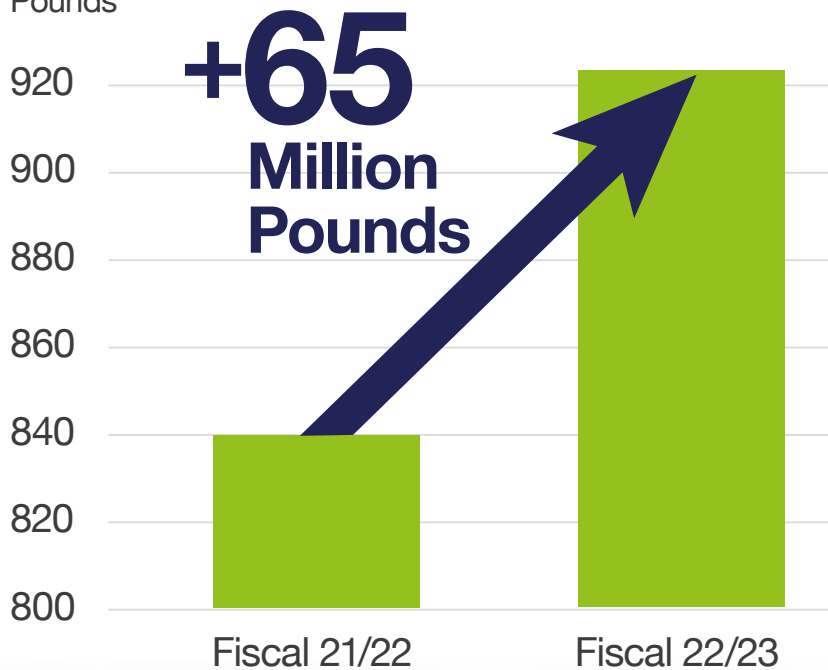
\*Assumes Avg 3K lbs/acre, estimated 461K acres in Fiscal 22/23



# THE GROWERS

## TOTAL Pistachio Shipments

Million  
Pounds



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# BY THE NUMBERS

# TOTAL U.S. PISTACHIO PRODUCTION 1979-1999

by Year from 1979-1999



YEAR	BEARING ACRES <sup>[1]</sup>	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 2000-2023

by Year from 2000-2023



YEAR	BEARING ACRES <sup>[1]</sup>	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 <sup>[2]</sup>	137,102	381,890,120	125,356,777	21,208,603	528,455,501	3,806
2011	152,944	343,786,231	87,550,309	16,559,761	447,896,301	2,902
2012	177,738	466,618,504	67,713,923	21,079,982	555,412,410	3,100
2013	202,997	382,681,859	70,427,894	22,445,434	475,555,187	2,312
2014	220,527	412,063,855	89,026,621	18,048,229	519,138,705	2,329
2015	232,655	207,135,271	54,144,987	13,425,383	274,705,641	1,161
2016	239,385	671,310,748	170,827,183	61,000,570	903,138,501	3,745
2017	270,010	463,815,722	100,192,518	41,716,763	605,725,003	2,397
2018	302,058	746,858,150	198,310,642	48,947,984	994,116,766	3,736
2019	339,745	582,111,271	134,116,879	32,332,447	748,560,597	2,566
2020	371,386	864,543,877	119,852,892	57,720,457	1,042,117,226	2,806
2021	408,766	986,404,293	106,836,726	73,542,165	1,166,783,184	2,822
2022	427,179	670,184,946	161,809,130	52,145,464	884,139,535	2,057
2023	461,080	1,230,247,929	165,035,072	97,456,253	1,492,739,254	3,217

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

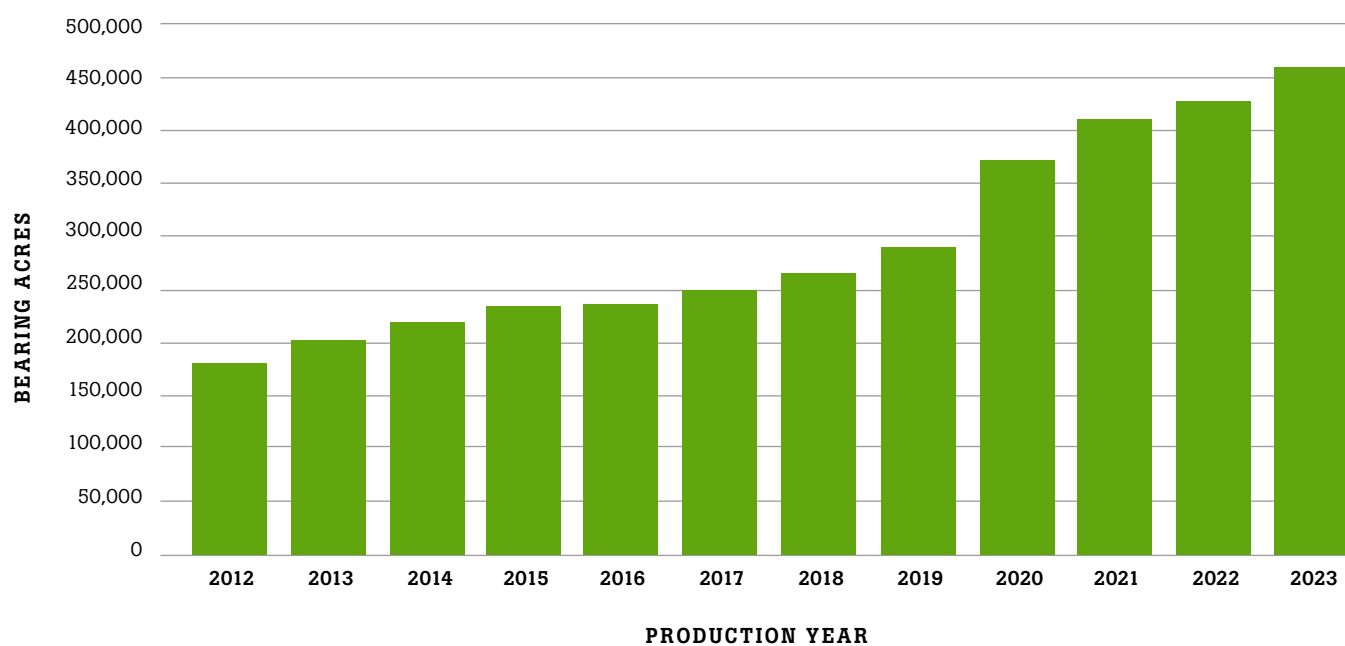
[1] Bearing acreage for 1989 to date is defined as plantings six years and older. Bearing acreage prior to 1989 is defined as plantings seven years and older.

[2] Arizona & New Mexico data included starting in the 2010/2011 Crop Year. However acreage and yield numbers reflect California data only.

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

# TREE NUT ACREAGE COMPARISON

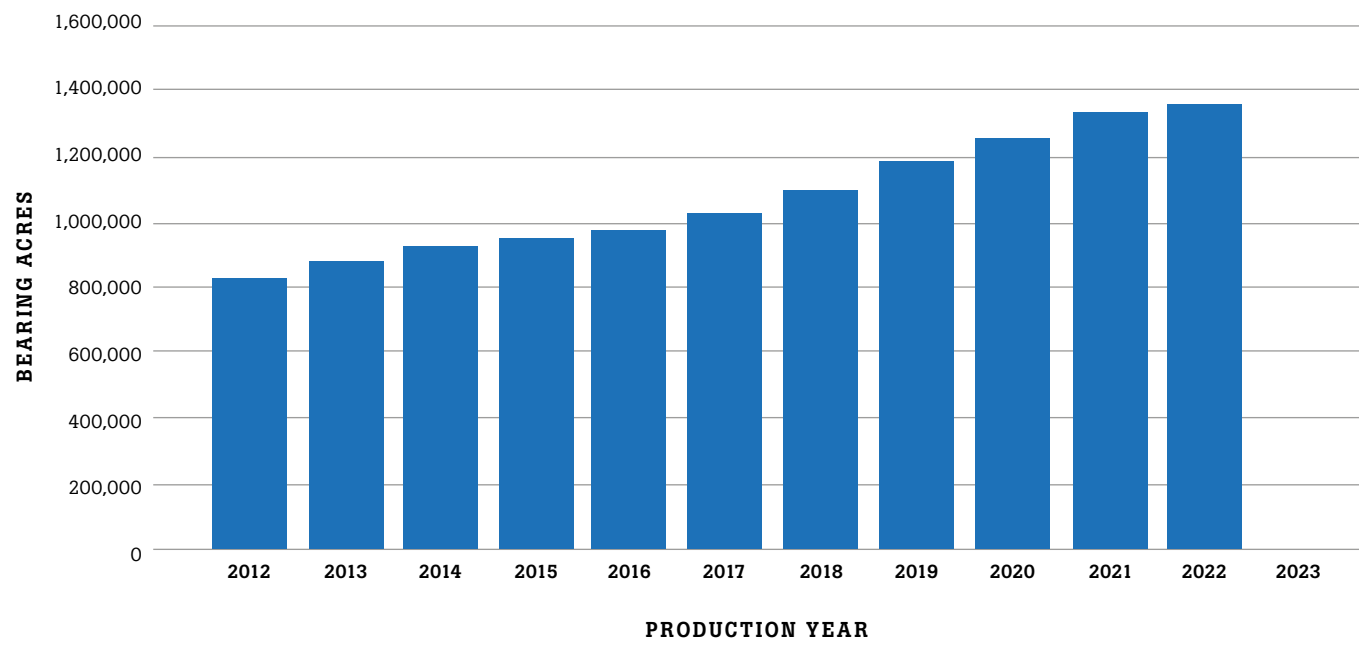
## PISTACHIOS



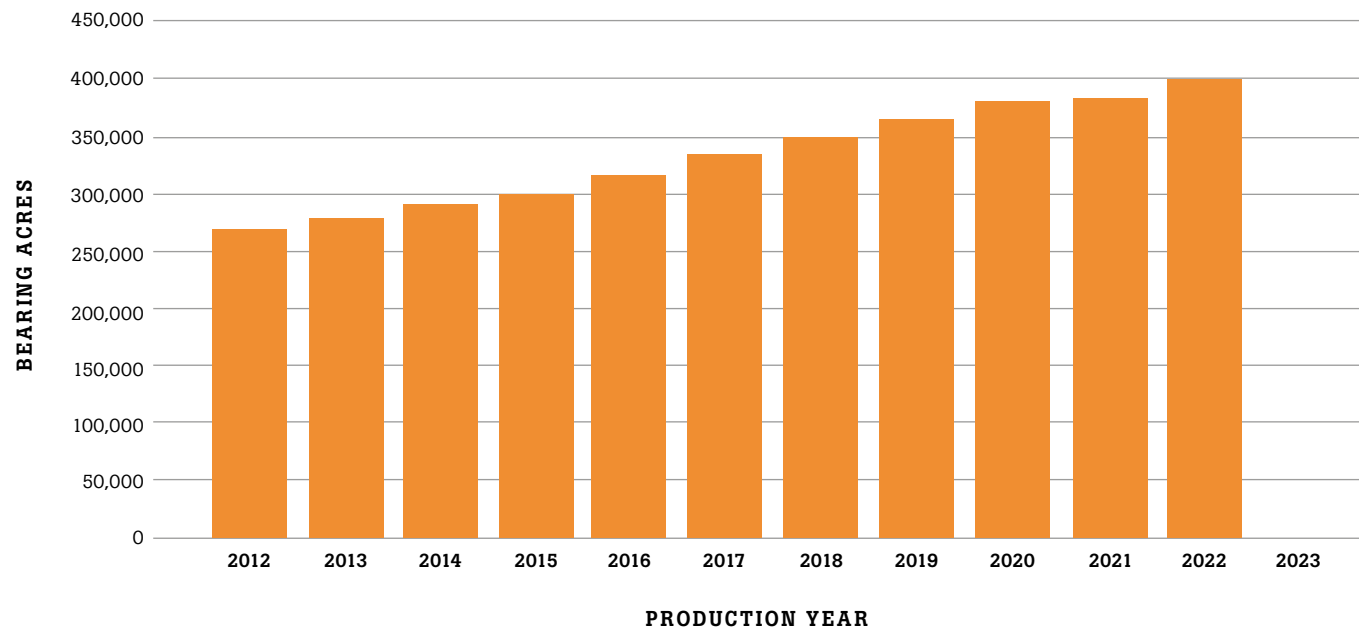
Sources: CASS/NASS Statistical Data and ACP Acreage Surveys.



## ALMONDS



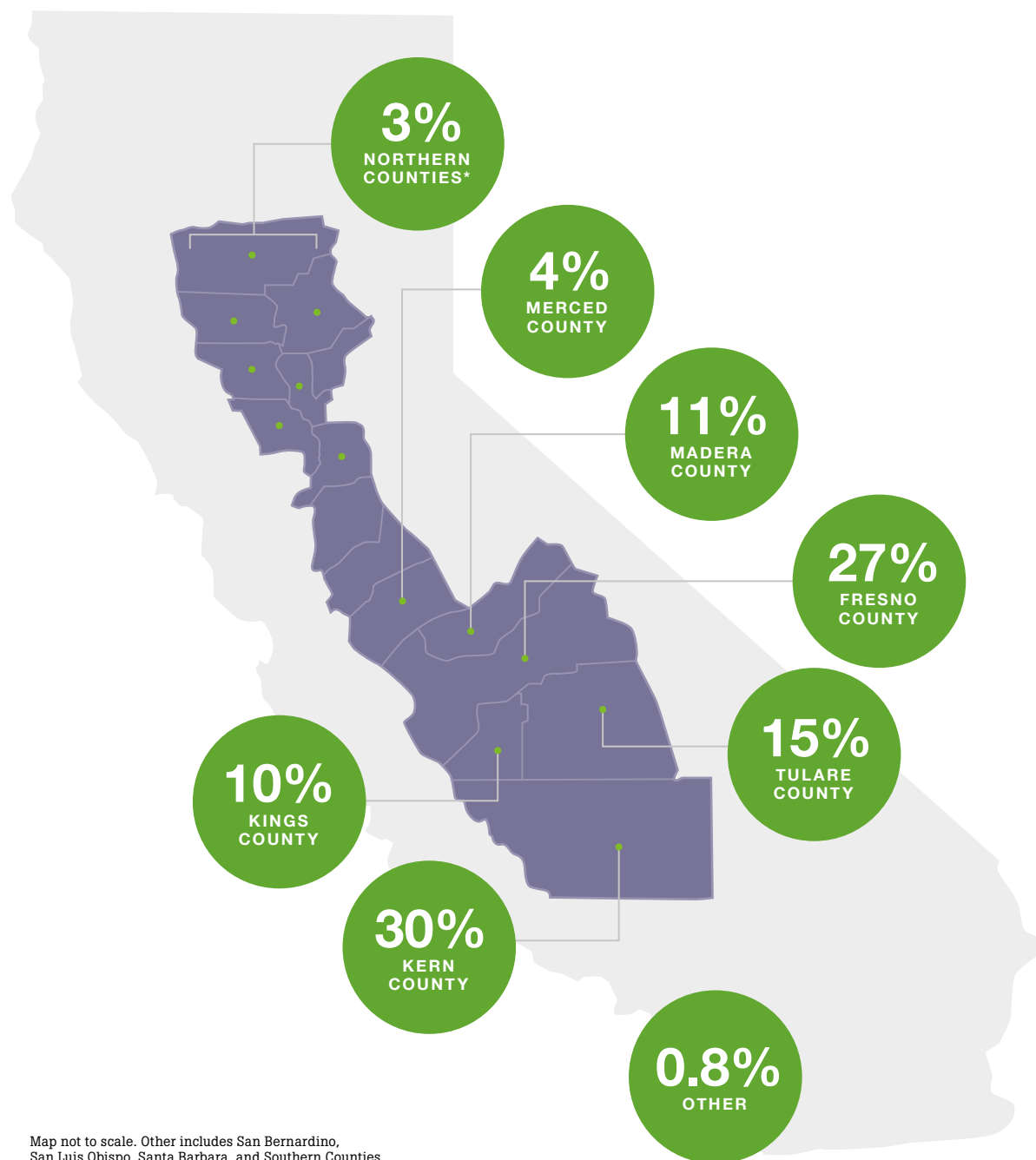
## WALNUTS



Sources: CASS/NASS Statistical Data and ACP Acreage Surveys.  
Almond and Walnut Data for 2023 unavailable at time of report production.

# 2023 PISTACHIO BEARING ACREAGE, PRODUCTION AND YIELD PER ACRE IN CALIFORNIA

by District and 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.

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



# 2023 PISTACHIO BEARING ACREAGE, PRODUCTION, AND YIELD PER ACRE



by District and County

	BEARING ACRES*	OPEN INSHELL	CLOSED SHELL	SHELLING STOCK	TOTAL PRODUCTION (POUNDS)	YIELD/ BEARING ACRE (POUNDS)
<b>DISTRICT 1**</b>						
KERN	139,301	347,771,339	53,256,759	24,700,949	425,729,047	3,056
SAN BERNARDINO <sup>(1)</sup>	960	428,781	145,849	28,022	602,652	628
SAN LUIS OBISPO	423	1,231,740	217,346	145,396	1,594,482	3,769
SANTA BARBARA	831	1,457,203	782,965	102,676	2,342,844	2,819
TULARE	67,309	157,684,881	24,624,912	23,049,572	205,359,365	3,051
<b>DISTRICT 1 TOTALS</b>	<b>208,824</b>	<b>508,573,944</b>	<b>79,027,831</b>	<b>48,026,615</b>	<b>635,628,390</b>	<b>3,044</b>
<b>DISTRICT 2</b>						
PRESNO	123,555	378,372,612	38,537,274	20,153,530	437,063,416	3,537
KINGS	43,942	129,061,234	15,613,033	9,318,597	153,992,864	3,504
MADERA	51,862	124,155,788	17,810,711	9,266,938	151,233,437	2,916
MERCED	18,315	48,853,044	6,002,448	5,390,120	60,245,612	3,289
<b>DISTRICT 2 TOTALS</b>	<b>237,674</b>	<b>680,442,678</b>	<b>77,963,466</b>	<b>44,129,184</b>	<b>802,535,328</b>	<b>3,377</b>
<b>DISTRICT 3**</b>						
NORTHERN COUNTIES <sup>(2)</sup>	13,065	31,769,864	5,744,210	4,136,106	41,650,180	3,188
SOUTHERN COUNTIES <sup>(3)</sup>	1,517	2,484,491	648,525	238,033	3,371,049	2,222
<b>DISTRICT 3 TOTALS</b>	<b>14,582</b>	<b>34,254,355</b>	<b>6,392,735</b>	<b>4,374,139</b>	<b>45,021,229</b>	<b>3,087</b>
<b>CALIFORNIA TOTALS</b>	<b>461,080</b>	<b>1,223,270,977</b>	<b>163,384,032</b>	<b>96,529,938</b>	<b>1,483,184,947</b>	<b>3,217</b>
<b>DISTRICT 4 TOTALS***</b>	<b>N/A</b>	<b>6,976,952</b>	<b>1,651,040</b>	<b>926,315</b>	<b>9,554,307</b>	<b>N/A</b>
<b>TOTAL US PISTACHIO CROP</b>		<b>1,230,247,929</b>	<b>165,035,072</b>	<b>97,456,253</b>	<b>1,492,739,254</b>	

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

\*Bearing Acres Source: Land IQ. California Statewide Pistachio Mapping - 2020.

- Based on imagery from USDA National Agricultural Imaging Program (NAIP), USGS Landsat, and private imagery resources.

- Bearing acreage is defined as plantings six years old and older.

\*\*Counties with few growers have been combined due to privacy issues.

<sup>(1)</sup> Includes Los Angeles and Riverside Counties.

<sup>(2)</sup> Butte, Colusa, Glenn, Placer, Sacramento, Shasta, Solano, Sutter, Tehama, Yolo, Yuba.

<sup>(3)</sup> Alameda, Calaveras, Contra Costa, Monterey, San Benito, San Joaquin, Santa Clara, Stanislaus.

\*\*\*District 4 is Arizona and New Mexico.

# CALIFORNIA PISTACHIO PRODUCTION HISTORY 1980-2000



by Year from 1980-2000

YEAR	TOTAL PRODUCTION	OPEN INSHELL	PERCENT OF TOTAL PRODUCTION	CLOSED SHELL*	PERCENT OF TOTAL PRODUCTION	SHELLING STOCK	PERCENT OF TOTAL PRODUCTION	YIELD (POUNDS/ ACRE)
1980	27,200,000	18,600,000	68.4%	–	–	8,600,000	31.6%	1,055
1981	14,147,875	10,903,242	77.1%	–	–	3,244,633	22.9%	523
1982	43,214,539	37,366,499	86.5%	–	–	5,848,040	13.5%	1,468
1983	26,319,156	20,886,616	79.4%	–	–	5,432,540	20.6%	844
1984	62,638,990	45,171,125	72.1%	–	–	17,467,865	27.9%	2,027
1985	27,288,795	22,497,527	82.4%	–	–	4,791,268	17.6%	838
1986	76,693,882	64,518,438	84.1%	–	–	12,175,444	15.9%	2,240
1987	33,458,574	29,152,439	87.1%	–	–	4,306,135	12.9%	818
1988	96,402,259	71,989,599	74.7%	–	–	24,412,660	25.3%	2,117
1989	39,514,481	33,186,931	84.0%	–	–	6,327,550	16.0%	800
1990	117,294,912	92,657,459	79.0%	–	–	24,637,453	21.0%	2,375
1991	76,429,547	58,913,785	77.1%	–	–	17,515,762	22.9%	1,465
1992	146,500,153	114,320,726	78.0%	–	–	32,179,427	22.0%	2,592
1993	150,906,921	112,645,883	74.7%	–	–	38,261,038	25.3%	2,648
1994	128,328,015	94,074,802	73.3%	–	–	34,253,213	26.7%	2,232
1995	147,652,532	107,342,387	72.7%	–	–	40,310,145	27.3%	2,449
1996	104,324,193	84,469,382	81.0%	–	–	19,854,811	19.0%	1,622
1997	179,492,470	136,616,006	76.1%	–	–	42,876,464	23.9%	2,746
1998	187,487,319	137,644,225	73.4%	38,644,205	20.6%	11,198,889	6.0%	2,757
1999	122,391,521	104,374,839	85.3%	12,029,978	9.8%	5,986,704	4.9%	1,724
2000	241,554,218	188,796,676	78.2%	38,638,066	16.0%	14,119,476	5.8%	3,239

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

Sources:

1980 - 2006: California Pistachio Commission Processors' Producer Delivery Reports and Acreage Surveys.

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



# CALIFORNIA PISTACHIO PRODUCTION HISTORY 2001-2023



by Year from 2001-2023

YEAR	TOTAL PRODUCTION	OPEN INSHELL	PERCENT OF TOTAL PRODUCTION	CLOSED SHELL*	PERCENT OF TOTAL PRODUCTION	SHELLING STOCK	PERCENT OF TOTAL PRODUCTION	YIELD (POUNDS/ ACRE)
2001	160,295,282	125,849,554	78.5%	26,356,995	16.4%	8,088,733	5.1%	2,055
2002	302,434,693	241,664,914	79.9%	42,096,386	13.9%	18,673,390	6.2%	3,644
2003	118,042,323	89,248,483	75.6%	22,072,569	18.7%	6,721,271	5.7%	1,341
2004	346,781,488	253,920,610	73.2%	73,011,946	21.1%	19,848,932	5.7%	3,729
2005	282,385,160	214,575,387	76.0%	56,858,178	20.1%	10,951,595	3.9%	2,701
2006	237,471,763	200,234,652	84.3%	25,004,012	10.5%	12,233,099	5.2%	2,111
2007	415,694,893	332,444,535	80.0%	53,953,597	13.0%	29,296,761	7.0%	3,615
2008	277,990,206	230,547,823	82.9%	36,538,701	13.1%	10,903,682	3.9%	2,353
2009	354,510,976	289,857,258	81.8%	48,436,667	13.7%	16,217,051	4.6%	2,822
2010	521,798,038	377,922,848	72.4%	124,552,672	23.9%	19,322,518	3.7%	3,806
2011	443,814,053	340,629,631	76.8%	86,846,692	19.6%	16,337,730	3.7%	2,902
2012	550,984,409	463,303,334	84.1%	67,233,364	12.2%	20,447,710	3.7%	3,100
2013	469,344,208	378,050,138	80.5%	69,415,633	14.8%	21,878,437	4.7%	2,312
2014	513,626,672	407,691,332	79.4%	88,500,092	17.2%	17,435,248	3.4%	2,329
2015	270,096,856	203,538,562	75.4%	53,607,893	19.8%	12,950,401	4.8%	1,161
2016	896,486,671	666,568,699	74.4%	169,579,930	18.9%	60,338,042	6.7%	3,745
2017	600,277,324	460,584,779	76.7%	98,732,689	16.4%	40,959,856	6.8%	2,220
2018	986,656,177	741,650,951	75.2%	197,014,326	20.0%	47,990,900	4.9%	3,262
2019	740,395,641	575,706,796	77.8%	132,847,155	17.9%	31,841,690	4.3%	2,177
2020	1,042,117,226	864,543,877	83.0%	119,852,892	11.5%	57,720,457	5.5%	2,806
2021	1,153,517,168	976,456,699	84.7%	104,995,562	9.1%	72,064,907	6.2%	2,822
2022	878,697,027	666,374,048	75.8%	161,233,486	18.3%	51,089,498	5.8%	2,057
2023	1,483,184,947	1,223,270,977	82.5%	163,384,032	11.0%	96,529,938	6.5%	3,217

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

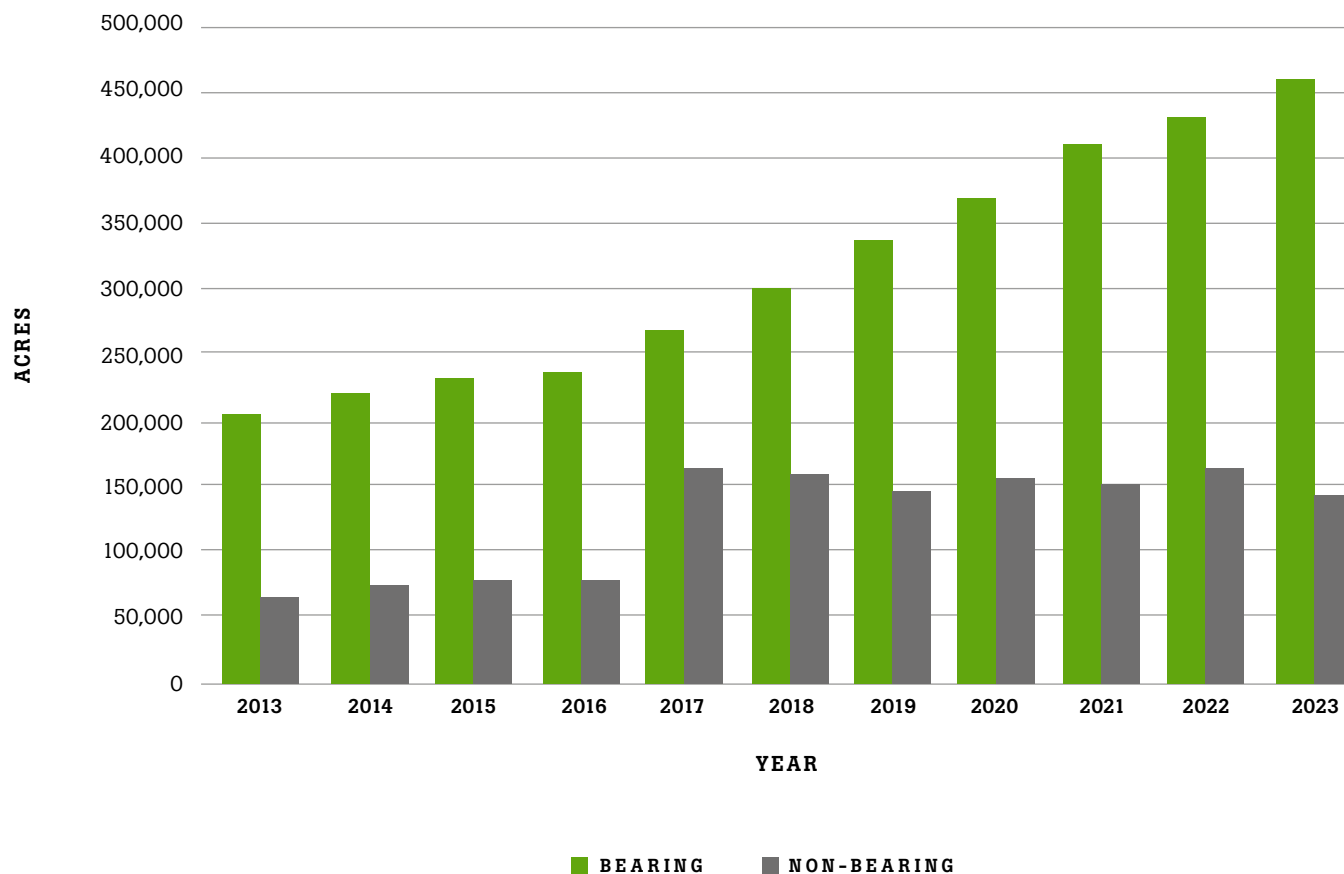
Sources:

1980 - 2006: California Pistachio Commission Processors' Producer Delivery Reports and Acreage Surveys.

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

# BEARING VS NON-BEARING - CALIFORNIA

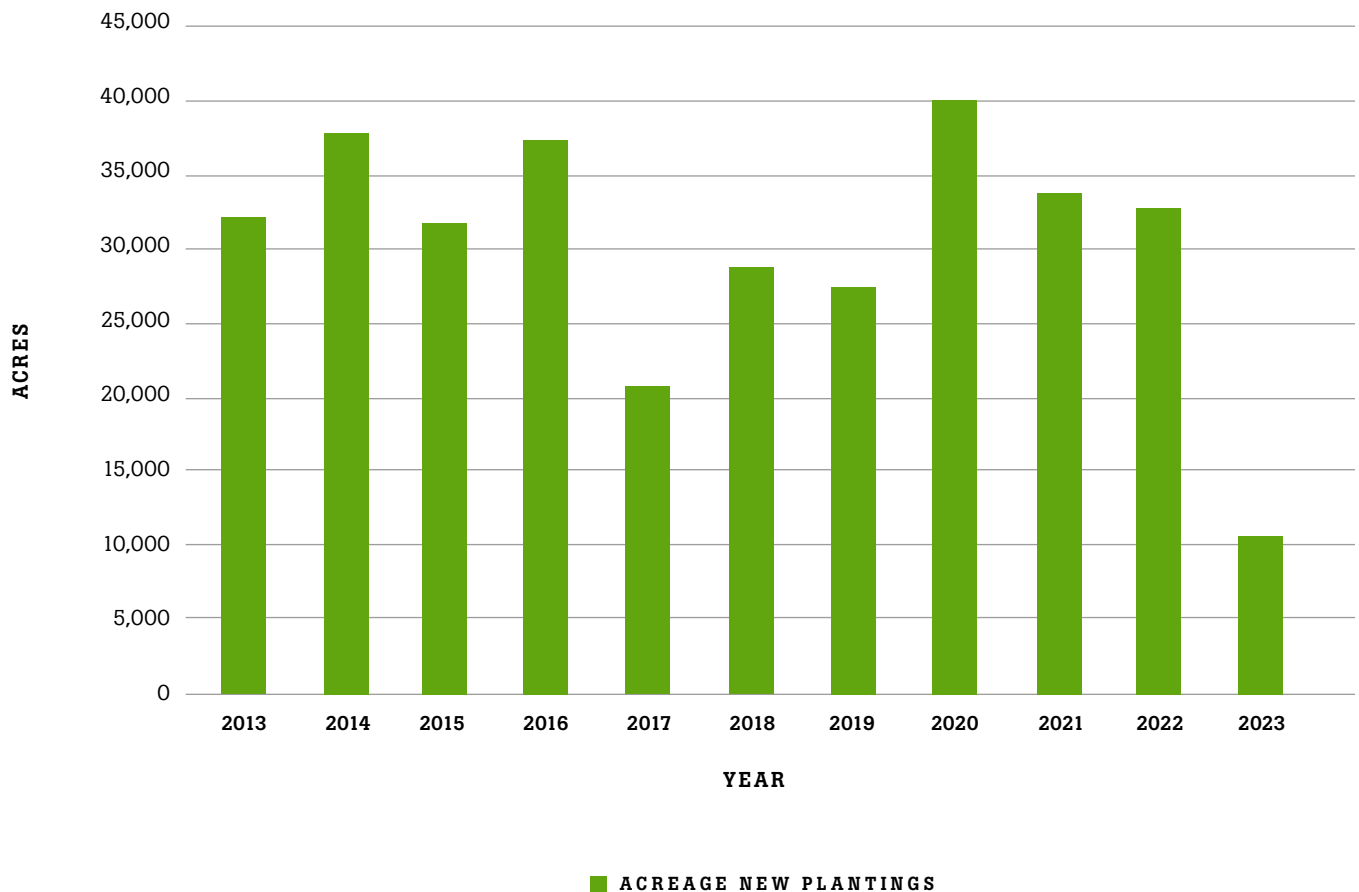
(In Acres)



Sources: CPC, ACP and Land IQ Reports.



# ACREAGE NEW PLANTINGS - CALIFORNIA



Sources: CPC, ACP and Land IQ Reports.

# CALIFORNIA PISTACHIO ACREAGE AND CROP VALUE 1979-2000



YEAR	ACREAGE				YIELD		CROP VALUE		
	BEARING	NON-BEARING	TOTAL	NEW PLANTINGS	BEARING YIELD/ACRE	PRODUCTION (MILLION POUNDS)	AVERAGE RETURN/POUND <sup>1</sup>	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	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
2000	74,578	21,730	96,308	3,903	3,239	241.6	1.01	244.02	3,272

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

<sup>1</sup>Weighted average which includes shelling stock. NASS periodically revises these numbers.

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

<sup>3</sup>Based on Land IQ bearing/Non-Bearing Acreage Reports for 2023 and forward. Yield has changed from previously reported statistics.

<sup>4</sup>NASS suspended data collection in 2016-2017. The average return per pound for these two years have not been updated and are likely erroneous.

<sup>5</sup>NASS updated 2019 average return May 2021 (was 2.62).

<sup>6</sup>NASS updated 2020 average return May 2022 (was 2.75).



# CALIFORNIA PISTACHIO ACREAGE AND CROP VALUE 2001-2023



	ACREAGE				YIELD		CROP VALUE		
YEAR	BEARING	NON-BEARING	TOTAL	NEW PLANTINGS	BEARING YIELD/ACRE	PRODUCTION (MILLION POUNDS)	AVERAGE RETURN/POUND <sup>1</sup>	TOTAL VALUE (MILLION \$)	VALUE/BEARING ACRE
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	3,806	521.8	2.22	1,158.40	8,449
2011	152,944	73,392	226,336	9,017 <sup>2</sup>	2,902	443.8	1.98	878.72	5,745
2012	177,738	62,308	240,046	30,625 <sup>2</sup>	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	N/A <sup>4</sup>	N/A	N/A
2017 <sup>3</sup>	270,010	162,384	432,394	20,763	2,220	600.3	N/A <sup>4</sup>	N/A	N/A
2018	302,058	158,841	460,899	28,655	3,262	986.7	2.65	2,614.76	8,656
2019	339,745	148,604	488,349	27,450	2,177	740.4	2.81 <sup>5</sup>	2,080.52	6,124
2020	371,386	157,149	528,535	40,006	2,806	1,042.1	2.51 <sup>6</sup>	2,615.67	7,043
2021	411,661	150,656	562,317	33,782	2,822	1,153.5	2.52	2,906.82	7,061
2022	432,424	162,518	594,942	32,625	2,057	878.7	2022 average return unavailable		
2023	461,080	144,363	605,442	10,500	3,217	1,483.3	2023 average return unavailable		

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

<sup>1</sup>Weighted average which includes shelling stock. NASS periodically revises these numbers.

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

<sup>3</sup>Based on Land IQ bearing/Non-Bearing Acreage Reports for 2023 and forward. Yield has changed from previously reported statistics.

<sup>4</sup>NASS suspended data collection in 2016-2017. The average return per pound for these two years have not been updated and are likely erroneous.

<sup>5</sup>NASS updated 2019 average return May 2021 (was 2.62).

<sup>6</sup>NASS updated 2020 average return May 2022 (was 2.75).

# PISTACHIO INDUSTRY OPEN INSHELL SHIPMENTS/ INVENTORY HISTORY 1987-2007

CROP YEAR	NEW CROP (OPEN INSHELL) <sup>1</sup>	INVENTORY ADJUSTMENTS <sup>2</sup>	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS <sup>3</sup>	TOTAL SHIPMENTS	INVENTORY CARRYOUT/ CARRYIN
<b>1987/88</b>	29,152,439	(1,800,790)	53,114,655	40,276,878	6,266,497	46,543,375	6,571,280
<b>1988/89</b>	71,989,599	4,112,916	82,673,795	48,158,964	11,190,380	59,349,344	23,324,451
<b>1989/90</b>	33,186,931	(3,202,786)	53,308,596	35,311,575	5,753,338	41,064,913	12,243,683
<b>1990/91</b>	92,657,459	2,523,709	107,424,851	63,387,571	16,113,721	79,501,292	27,923,559
<b>1991/92</b>	58,913,785	6,647,377	93,484,721	59,662,021	25,921,087	85,583,108	7,901,613
<b>1992/93</b>	114,320,726	10,897,159	133,119,498	76,037,890	34,635,897	110,673,787	22,445,711
<b>1993/94</b>	112,645,883	3,571,570	138,663,164	69,590,108	32,555,293	102,145,401	36,517,763
<b>1994/95</b>	94,074,802	9,028,163	139,620,728	80,314,468	36,071,219	116,385,687	23,235,041
<b>1995/96</b>	107,342,387	(1,480,859)	129,096,569	69,740,482	39,330,159	109,070,641	20,025,928
<b>1996/97</b>	84,469,382	1,988,738	106,484,048	58,683,031	33,203,907	91,886,938	14,597,110
<b>1997/98</b>	136,616,006	5,081,231	156,294,347	74,821,240	66,380,564	141,201,804	15,092,543
<b>1998/99</b>	137,644,225	7,873,838	160,610,606	85,112,260	49,995,685	135,107,945	25,502,661
<b>1999/00</b>	104,374,839	(3,392,808)	126,484,692	76,866,274	33,061,606	109,927,880	16,556,812
<b>2000/01</b>	188,793,654	(515,762)	204,834,704	106,683,890	48,008,950	154,692,840	48,409,891
<b>2001/02</b>	125,849,554	(8,249,269)	166,010,176	97,347,328	55,355,787	152,703,115	13,307,061
<b>2002/03</b>	241,656,847	(6,455,957)	248,507,951	97,959,721	63,773,344	161,733,065	86,774,886
<b>2003/04</b>	89,255,589	(3,984,770)	172,045,705	111,929,789	53,169,870	165,099,659	6,946,046
<b>2004/05</b>	253,920,610	(11,043,286)	249,823,370	105,773,078	95,761,666	201,534,744	48,288,626
<b>2005/06</b>	214,575,387	(4,204,583)	258,659,430	85,915,717	82,552,955	168,468,672	90,190,758
<b>2006/07</b>	200,234,652	(34,185,741)	256,239,669	87,363,653	97,983,575	185,347,228	70,892,441

<sup>1</sup>Only open inshell is reported as this is the industry standard for determining inventory carryover.

<sup>2</sup>Inventory adjustments include splitting and shelling adjustments as well as inventory adjustments resulting from processing loss and inventory corrections.

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

<sup>4</sup>District 4 data included starting with the 2010/2011 Crop Year.



# OPEN INSHELL SHIPMENTS/ INVENTORY CARRYOVER HISTORY 2007-2023

CROP YEAR	NEW CROP (OPEN INSHELL) <sup>1</sup>	INVENTORY ADJUSTMENTS <sup>2</sup>	TOTAL SALABLE SUPPLY	DOMESTIC SHIPMENTS	EXPORT SHIPMENTS <sup>3</sup>	TOTAL SHIPMENTS	INVENTORY CARRYOUT/ CARRYIN
<b>2007/08</b>	332,378,075	(26,075,313)	377,563,791	115,787,557	168,995,508	284,783,065	92,780,726
<b>2008/09</b>	230,547,823	(3,125,768)	320,202,781	85,313,225	183,089,493	268,402,718	51,800,063
<b>2009/10</b>	289,857,258	(10,950,254)	330,707,067	114,842,769	192,436,136	307,278,905	23,428,162
<b>2010/11<sup>4</sup></b>	381,890,117	(30,363,452)	374,954,827	122,456,770	173,191,437	295,648,207	79,306,620
<b>2011/12</b>	343,786,231	(30,876,217)	392,216,634	153,904,736	200,542,576	354,447,312	37,769,322
<b>2012/13</b>	466,618,504	(34,760,117)	469,627,709	146,797,517	237,746,411	384,543,928	85,083,781
<b>2013/14</b>	382,681,859	(31,379,912)	436,385,728	125,696,820	255,976,908	381,673,728	54,712,000
<b>2014/15</b>	412,063,855	(49,541,570)	417,234,285	116,481,103	194,362,124	310,843,227	106,391,058
<b>2015/16</b>	207,217,512	(34,886,402)	278,722,168	106,066,958	125,698,802	231,765,760	46,956,408
<b>2016/17</b>	671,310,748	(76,994,846)	641,272,310	162,727,388	352,485,698	515,213,086	126,059,224
<b>2017/18</b>	463,815,722	(64,571,025)	525,303,921	169,561,852	323,752,564	493,314,416	31,989,505
<b>2018/19</b>	746,858,150	(82,142,973)	696,704,682	181,444,677	452,819,647	634,264,324	62,440,358
<b>2019/20</b>	582,111,271	(76,294,888)	568,256,741	170,971,201	311,802,984	482,774,185	85,482,556
<b>2020/21</b>	871,450,109	(130,446,533)	826,486,132	184,157,798	439,400,199	623,557,997	202,928,135
<b>2021/22</b>	986,404,293	(211,547,436)	977,784,992	194,842,087	502,416,627	697,258,714	280,526,278
<b>2022/23</b>	670,184,946	(102,248,664)	848,462,560	176,678,889	561,017,963	737,696,852	110,765,708

<sup>1</sup>Only open inshell is reported as this is the industry standard for determining inventory carryover.

<sup>2</sup>Inventory adjustments include splitting and shelling adjustments as well as inventory adjustments resulting from processing loss and inventory corrections.

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

<sup>4</sup>District 4 data included starting with the 2010/2011 Crop Year.



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# PISTACHIO SHIPMENTS IN POUNDS

Years Ended August 31

	OPEN INSHELL				ARTIFICIALLY OPENED			
DOMESTIC	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
SEPTEMBER	12,430,928	12,999,930	13,156,012	15,235,747	0	0	0	0
OCTOBER	17,421,634	12,456,184	15,634,176	13,503,435	0	0	0	0
NOVEMBER	18,514,845	15,515,588	15,990,815	15,322,516	0	0	0	0
DECEMBER	16,567,337	18,129,883	17,868,077	17,073,274	0	0	0	0
JANUARY	13,450,115	17,902,073	20,575,014	17,683,111	0	0	0	0
FEBRUARY	11,281,145	15,278,845	16,732,092	12,467,183	0	0	0	0
MARCH	17,430,252	15,561,039	19,836,742	14,552,028	0	0	0	0
APRIL	10,926,033	14,695,977	12,841,737	11,834,675	0	0	0	0
MAY	12,919,088	13,351,453	12,772,336	14,832,156	0	0	0	0
JUNE	14,536,102	16,667,738	20,875,685	14,358,628	0	0	0	0
JULY	11,667,573	15,502,404	13,360,211	13,330,126	0	0	0	0
AUGUST	13,826,149	16,096,684	15,199,190	16,486,010	0	0	0	0
<b>TOTAL DOMESTIC</b>	<b>170,971,201</b>	<b>184,157,798</b>	<b>194,842,087</b>	<b>176,678,889</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>SHIPMENTS</b>	<b>35.4%</b>	<b>29.5%</b>	<b>27.9%</b>	<b>24.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
EXPORT	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
SEPTEMBER	16,248,842	20,516,300	57,602,846	39,119,827	0	0	0	0
OCTOBER	47,613,315	47,876,438	60,046,122	59,049,795	0	0	0	0
NOVEMBER	55,317,251	76,367,661	62,672,999	45,034,167	0	0	0	0
DECEMBER	21,530,641	56,534,335	24,020,891	42,837,906	0	0	0	0
JANUARY	31,546,884	27,417,397	25,079,061	41,829,009	0	0	0	0
FEBRUARY	24,208,586	28,264,700	35,187,046	41,565,289	0	0	0	0
MARCH	28,800,733	29,558,336	39,373,689	62,909,135	0	0	0	0
APRIL	23,766,503	29,998,884	31,252,948	47,839,548	0	0	0	0
MAY	17,871,432	28,257,992	43,016,956	56,179,185	0	0	0	0
JUNE	17,993,421	35,839,042	56,340,997	57,041,210	0	0	0	0
JULY	13,262,578	26,403,827	28,885,862	32,229,779	0	0	0	0
AUGUST	13,642,798	32,365,287	38,937,210	35,383,113	0	0	0	0
<b>TOTAL EXPORT</b>	<b>311,802,984</b>	<b>439,400,199</b>	<b>502,416,627</b>	<b>561,017,963</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>SHIPMENTS</b>	<b>64.6%</b>	<b>70.5%</b>	<b>72.1%</b>	<b>76.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>
<b>YEAR TOTALS</b>	<b>482,774,185</b>	<b>623,557,997</b>	<b>697,258,714</b>	<b>737,696,852</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Source: Administrative Committee for Pistachios Inventory/Shipment Reports.

# PISTACHIO SHIPMENTS IN POUNDS

Years Ended August 31

	CLOSED SHELL				SHELLING STOCK			
DOMESTIC	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
SEPTEMBER	61,385	116,611	77,970	124,233	135,776	105,025	96,435	80,793
OCTOBER	69,258	60,940	63,530	149,329	198,916	189,144	235,391	383,577
NOVEMBER	102,012	0	6,100	41,511	0	0	0	238,505
DECEMBER	2,645	0	12,051	263,433	15,340	385,000	148	171,241
JANUARY	24,806	0	0	53,418	6,175	11,000	0	12,087
FEBRUARY	116,963	105,772	13	266,422	213,012	9,309	96,037	104,968
MARCH	115,721	0	106,000	265,334	14,304	88,000	334,000	109,300
APRIL	176,000	6,073	250	11,674	42,000	51,343	723	3,946
MAY	336,594	9,326	26	43,527	51,416	22,594	40,709	76,637
JUNE	70,489	49,932	906	38,161	60,588	21,850	2,621	19,003
JULY	-64,842	60,096	44,493	4,643	-8,578	29,270	1,427	3,678
AUGUST	1,255	196,250	661	51,619	402	66,515	59,897	16,091
<b>TOTAL DOMESTIC</b>	<b>1,012,286</b>	<b>605,000</b>	<b>312,000</b>	<b>1,313,304</b>	<b>729,351</b>	<b>979,050</b>	<b>867,388</b>	<b>1,219,826</b>
<b>SHIPMENTS</b>	<b>3.4%</b>	<b>6.7%</b>	<b>1.4%</b>	<b>3.8%</b>	<b>10.5%</b>	<b>30.3%</b>	<b>8.1%</b>	<b>6.8%</b>
EXPORT	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
SEPTEMBER	1,625,036	1,145,120	1,567,612	2,378,161	792,059	20,672	69,016	1,145,203
OCTOBER	7,916,320	2,137,818	1,579,973	3,533,814	648,243	250,984	708,333	640,071
NOVEMBER	6,882,463	1,441,621	915,045	2,914,898	55,285	189,605	1,105,246	1,461,249
DECEMBER	1,086,000	615,740	924,694	1,529,694	1,513,000	86,021	63,182	1,166,977
JANUARY	2,078,573	520,000	1,272,867	1,795,429	1,768,000	0	134,024	595,556
FEBRUARY	2,097,700	839,016	991,293	2,724,169	792,000	589,124	400,101	1,063,158
MARCH	1,320,472	493,755	3,714,115	4,531,023	421,554	272,383	958,333	1,470,648
APRIL	2,645,096	264,573	1,372,885	3,263,959	88,022	236,263	1,640,613	1,154,906
MAY	1,021,777	212,357	2,745,392	2,335,953	4,022	18,582	874,992	1,287,934
JUNE	726,098	143,158	2,598,875	2,508,974	78,279	18,350	1,059,873	1,635,645
JULY	637,098	136,298	1,698,891	2,881,241	51,993	380,788	827,538	2,135,070
AUGUST	615,920	478,379	2,663,444	2,489,820	14,076	192,558	1,944,181	2,918,449
<b>TOTAL EXPORT</b>	<b>28,652,553</b>	<b>8,427,835</b>	<b>22,045,086</b>	<b>32,887,135</b>	<b>6,226,533</b>	<b>2,255,330</b>	<b>9,785,432</b>	<b>16,674,866</b>
<b>SHIPMENTS</b>	<b>96.6%</b>	<b>93.3%</b>	<b>98.6%</b>	<b>96.2%</b>	<b>89.5%</b>	<b>69.7%</b>	<b>91.9%</b>	<b>93.2%</b>
<b>YEAR TOTALS</b>	<b>29,664,839</b>	<b>9,032,835</b>	<b>22,357,086</b>	<b>34,200,439</b>	<b>6,955,884</b>	<b>3,234,380</b>	<b>10,652,820</b>	<b>17,894,692</b>

Source: Administrative Committee for Pistachios Inventory/Shipment Reports.



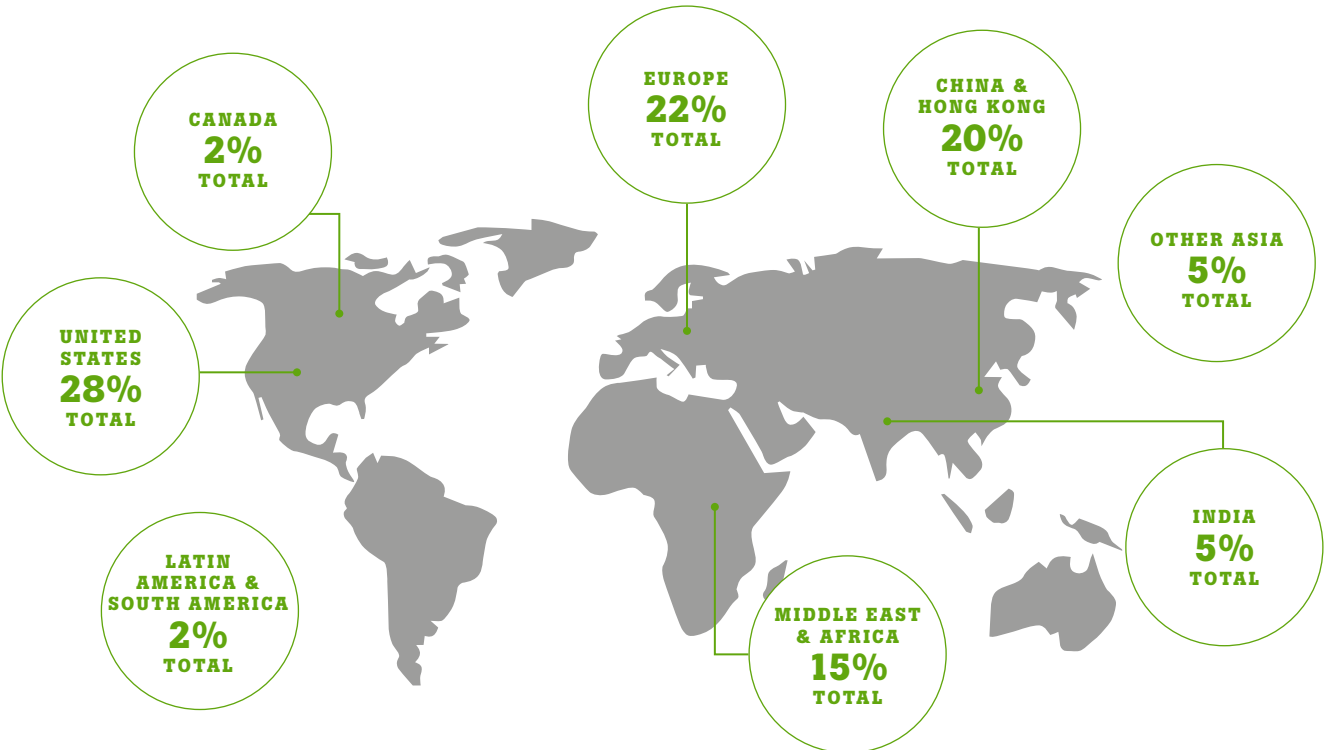
# PISTACHIO SHIPMENTS IN POUNDS

Years Ended August 31

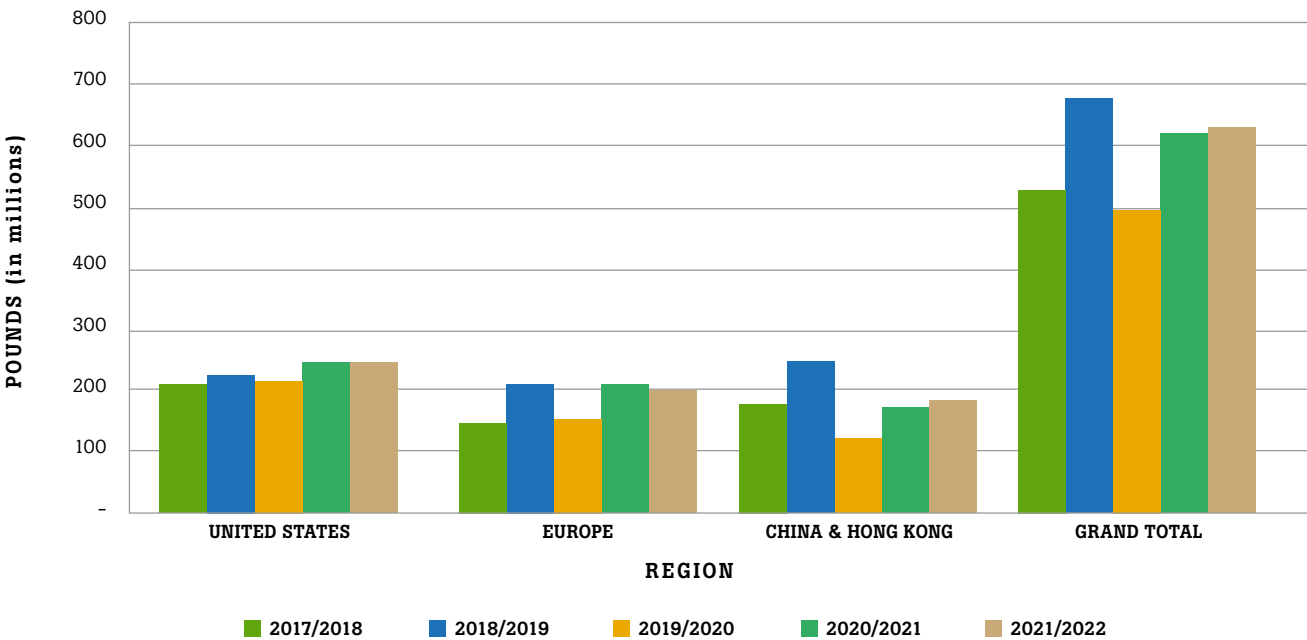
	KERNELS				TOTAL			
DOMESTIC	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
SEPTEMBER	3,395,431	5,329,066	5,329,066	5,577,264	16,023,520	18,550,632	18,659,483	21,018,037
OCTOBER	3,625,444	4,070,122	4,622,520	4,725,124	21,315,252	16,776,390	20,555,617	18,761,465
NOVEMBER	4,034,155	4,932,250	4,932,250	5,081,585	22,651,012	20,447,838	20,929,165	20,684,117
DECEMBER	3,534,888	5,235,660	5,824,537	5,698,382	20,120,210	23,750,543	23,704,813	23,206,330
JANUARY	4,551,688	4,798,799	5,459,792	5,792,444	18,032,784	22,711,872	26,034,806	23,541,060
FEBRUARY	4,462,633	4,396,158	5,391,000	4,897,765	16,073,753	19,790,084	22,219,142	17,736,338
MARCH	5,722,871	5,927,784	6,637,524	6,844,198	23,283,148	21,576,823	26,914,266	21,770,860
APRIL	3,688,465	6,367,641	5,587,834	5,690,015	14,832,498	21,121,034	18,430,544	17,540,310
MAY	3,572,708	4,666,752	5,138,067	6,150,530	16,879,806	18,050,125	17,951,138	21,102,850
JUNE	4,295,885	6,395,476	7,558,718	6,680,312	18,963,064	23,134,996	28,437,930	21,096,104
JULY	3,975,327	5,420,166	5,101,127	5,914,777	15,569,480	21,011,936	18,507,258	19,253,224
AUGUST	4,570,077	5,349,079	5,198,106	6,879,035	18,397,883	21,708,528	20,457,854	23,432,755
<b>TOTAL DOMESTIC</b>	<b>49,429,572</b>	<b>62,888,953</b>	<b>66,780,541</b>	<b>69,931,431</b>	<b>222,142,410</b>	<b>248,630,801</b>	<b>262,802,016</b>	<b>249,143,450</b>
<b>SHIPMENTS</b>	<b>71.4%</b>	<b>76.2%</b>	<b>62.8%</b>	<b>62.5%</b>	<b>37.7%</b>	<b>34.6%</b>	<b>31.4%</b>	<b>27.6%</b>
EXPORT	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
SEPTEMBER	1,401,399	845,059	1,950,522	2,250,211	20,067,336	22,527,151	61,189,996	44,893,402
OCTOBER	904,770	1,143,067	2,273,785	3,116,383	57,082,648	51,408,307	64,608,213	66,340,063
NOVEMBER	2,039,335	1,332,751	2,763,181	2,865,746	64,294,334	79,331,638	67,456,471	52,276,060
DECEMBER	2,160,539	2,223,857	1,571,611	2,455,896	26,290,180	59,459,953	26,580,378	47,990,473
JANUARY	2,725,656	1,894,436	2,016,653	2,391,503	38,119,113	29,831,833	28,502,605	46,611,497
FEBRUARY	2,690,762	1,833,275	2,313,750	3,854,977	29,789,048	31,526,115	38,892,190	49,207,593
MARCH	2,175,461	2,252,842	2,625,303	6,181,687	32,718,220	32,577,316	46,671,440	75,092,493
APRIL	1,087,951	2,096,635	4,315,932	3,175,917	27,587,572	32,596,355	38,582,378	55,434,330
MAY	1,000,427	1,887,945	3,560,357	3,385,493	19,897,658	30,376,876	50,197,697	63,188,565
JUNE	1,150,228	1,586,963	5,712,888	4,381,032	19,948,026	37,587,513	65,712,633	65,566,861
JULY	998,715	1,199,954	5,106,515	2,678,205	14,950,384	28,120,867	36,518,806	39,924,295
AUGUST	1,460,511	1,356,394	5,271,227	5,166,837	15,733,305	34,392,618	48,816,062	45,958,219
<b>TOTAL EXPORT</b>	<b>19,795,754</b>	<b>19,653,178</b>	<b>39,481,724</b>	<b>41,903,887</b>	<b>366,477,824</b>	<b>469,736,542</b>	<b>573,728,869</b>	<b>652,483,851</b>
<b>SHIPMENTS</b>	<b>28.6%</b>	<b>23.8%</b>	<b>37.2%</b>	<b>37.5%</b>	<b>62.3%</b>	<b>65.4%</b>	<b>68.6%</b>	<b>72.4%</b>
<b>YEAR TOTALS</b>	<b>69,225,326</b>	<b>82,542,131</b>	<b>106,262,265</b>	<b>111,835,318</b>	<b>588,620,234</b>	<b>718,367,343</b>	<b>836,530,885</b>	<b>901,627,301</b>

Source: Administrative Committee for Pistachios Inventory/Shipment Reports.

# SHIPMENT DESTINATIONS



# TOP DESTINATIONS



Source: Administrative Committee for Pistachios Inventory/Shipment Reports.

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# EXPORTS BY DESTINATION IN POUNDS

Years Ended August 31

	OPEN INSHELL				ARTIFICIALLY OPENED			
COUNTRY	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
ALGERIA	310,346	1,041,336	1,461,105	170,000	0	0	0	0
ARGENTINA	94,548	44,000	138,546	44,000	0	0	0	0
AUSTRALIA	3,975,435	2,996,539	2,947,517	1,136,617	0	0	0	0
BAHRAIN				310,750				
BELGIUM	10,305,915	12,075,448	8,447,517	1,094,671	0	0	0	0
BOSNIA AND HERZGOVINA				68,000				
BRAZIL	298,074	149,561	226,911	136,731	0	0	0	0
BULGARIA	245,950	451,800	675,725	128,975	0	0	0	0
CANADA	16,097,232	18,635,376	18,729,386	6,291,280	0	0	0	0
CHILE	415,144	1,509,542	1,297,557	226,265	0	0	0	0
CHINA	70,363,118	122,281,474	144,056,058	71,074,627	0	0	0	0
COLOMBIA	735,522	620,591	641,663	265,100	0	0	0	0
COSTA RICA	64,585	72,170	35,000	25,000	0	0	0	0
CYPRUS	108,400	160,000	91,750	47,000	0	0	0	0
CZECH REPUBLIC	388,000	1,278,013	1,901,989	566,000	0	0	0	0
DENMARK	0	0	0		0	0	0	0
ECUADOR	136,000	259,750	295,189	47,400	0	0	0	0
EGYPT	2,007,077	3,622,725	2,497,623	1,499,079	0	0	0	0
ESTONIA				1,364,000				
FR. POLYNESIA (TAHITI)								
FRANCE	6,767,206	7,940,852	10,456,401	2,277,442	0	0	0	0
GEORGIA				436,930				
GERMANY	57,784,069	76,906,340	78,362,092	9,408,209	0	0	0	0
GREECE	411,000	214,000	762,925	174,000	0	0	0	0
GUATEMALA	32,000	50,074	75,648	32,594	0	0	0	0
HONG KONG	29,333,796	28,833,876	19,707,217	10,994,860	0	0	0	0
INDIA	3,242,350	7,507,595	17,404,262	10,867,509	0	0	0	0
INDONESIA	52,006	60,231	147,086	55,374	0	0	0	0
ISRAEL	6,723,742	8,918,218	9,962,690	3,482,809	0	0	0	0
ITALY	7,035,251	10,586,472	10,885,443	5,028,410	0	0	0	0
JAPAN	3,716,975	4,296,869	5,729,940	1,416,025	0	0	0	0
JORDAN				1,067,200				
KOREA	1,405,171	2,055,700	2,476,908	375,993	0	0	0	0
KUWAIT				307,500				
LATVIA	253,234	194,571	309,140	93,975	0	0	0	0
LEBANON	75,350		150	92,500	0	0	0	0
LITHUANIA	2,252,835	2,947,154	4,968,077	1,225,715	0	0	0	0
LUXEMBOURG	3,959,587	14,251,219	3,256,000	1,273,800	0	0	0	0
MALAYSIA	789,540	1,615,119	1,474,945	374,985	0	0	0	0
MEXICO	6,137,669	9,718,116	12,445,519	5,657,430	0	0	0	0
MOROCCO				641,250				
NETHERLANDS	6,203,030	13,565,137	13,681,429	3,645,600	0	0	0	0
NEW ZEALAND	669,565	921,718	742,460	339,500	0	0	0	0
NORWAY	325,550	387,125	594,868	150,050	0	0	0	0
PERU	286,925	622,417	483,067	262,775	0	0	0	0
PHILIPPINES				151,128				
POLAND	2,813,650	4,379,160	6,915,730	1,340,551	0	0	0	0
PORTUGAL	531,531	923,250	88,000	44,000	0	0	0	0
QATAR				42,000				
ROMANIA	203,122	129,800	513,200	130,000	0	0	0	0
RUSSIA	259,000	3,300	135,300		0	0	0	0
SAUDI ARABIA	12,527,010	13,058,563	17,734,971	5,022,236	0	0	0	0
SINGAPORE	518,267	518,782	809,027	669,306	0	0	0	0
SOUTH AFRICA	376,250	678,375	1,525,288	917,044	0	0	0	0
SPAIN	24,487,298	24,842,532	26,498,151	6,763,084	0	0	0	0
SWEDEN	375,750	0	276,800	70,100	0	0	0	0
SWITZERLAND	1,332,000	1,896,000	1,684,000	438,000	0	0	0	0
TAIWAN	1,515,442	1,816,800	1,623,900	1,548,301	0	0	0	0
THAILAND	665,800	981,425	1,459,150	376,621	0	0	0	0
TURKEY	293,413	2,271,285	17,201,524	7,185,756	0	0	0	0
UKRAINE	1,317,175	2,098,520	566,500	43,000	0	0	0	0
UNITED ARAB EMIRATES	3,412,943	4,934,850	11,858,377	6,352,755	0	0	0	0
UNITED KINGDOM	7,189,178	10,477,029	9,389,365	3,244,423	0	0	0	0
VENEZUELA	0	22,000	60,500		0	0	0	0
VIETNAM	6,083,513	7,296,154	11,565,829	6,214,232	0	0	0	0
OTHER	4,407,067	5,948,567	14,698,939	1,311,228	0	0	0	0
TOTALS	311,310,606	439,067,520	501,974,354	186,041,695	0	0	0	0

Source: Administrative Committee for Pistachios Inventory/Shipment Reports.





# FARM CREDIT

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# EXPORTS BY DESTINATION IN POUNDS

Years Ended August 31

	CLOSED SHELL				SHELLING STOCK			
COUNTRY	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
ALGERIA	0				43,000	0		
ARGENTINA	0				0			
AUSTRALIA	0				0			
BAHRAIN								
BELGIUM	0				0			
BOSNIA AND HERZGOVINA								
BRAZIL	0				0			
BULGARIA	0				0			
CANADA	0	0	0		0	0	0	
CHILE	0				0			
CHINA	12,446,979	3,815,151	5,790,010		91,462	216,501	1,530,354	1,515,616
COLOMBIA	0				0			
COSTA RICA	0				0			
CYPRUS	44,000				0			
CZECH REPUBLIC	0				0			
DENMARK	0	0	0		0	0	0	
ECUADOR	0				0			
EGYPT	86,000				0			
ESTONIA								
FR. POLYNESIA (TAHITI)								
FRANCE	0	704	862	1,879	0	994	554	5,439
GEORGIA				88,000				
GERMANY	0		150,367	9,152	0		35,895	7,250
GREECE	0				0			
GUATEMALA	0				0			
HONG KONG	10,962,231	2,251,709	1,012,601	1,710,313	248,530	368,020	1,144,963	183,121
INDIA	44,000				66,000		659,720	139,519
INDONESIA	0			20,777	0			
ISRAEL	0				0			
ITALY	1,137,106	440,941	2,365,731	812,777	88,000	1,242	695	15,666
JAPAN	0				0			
JORDAN				176,000				88,000
KOREA	0		1,408	1,175	0		4,078	3,400
KUWAIT								
LATVIA	0				0			
LEBANON	86,000		516,000	129,000	0			
LITHUANIA	0		51,807		0			
LUXEMBOURG	0				0			
MALAYSIA	0				0			
MEXICO	0		1,267	6,324	0		2,024	186,310
MOROCCO								
NETHERLANDS	0				0			
NEW ZEALAND	0		1,024		0		2,966	
NORWAY	0				0			
PERU	0				0			
PHILIPPINES								
POLAND	0		44,000		0			
PORTUGAL	0				0			
QATAR								
ROMANIA	0				0			
RUSSIA	0				0			
SAUDI ARABIA	-43,000				0			
SINGAPORE	0		43,975		0			
SOUTH AFRICA	0		282	4,370	0		816	1,725
SPAIN	0	12,857	44,457	4,492	123,500	91,027	117,347	3,533
SWEDEN	0				0			
SWITZERLAND	0				0			
TAIWAN	0			61,152	0			40,602
THAILAND	0				0			
TURKEY	1,643,657	512,164	5,899,780	573,892	2,517,133	923,875	3,111,853	2,029,958
UKRAINE	0				0			
UNITED ARAB EMIRATES	0		860,000		0			
UNITED KINGDOM	0				0			
VENEZUELA	0				0		152,000	
VIETNAM	2,070,630	1,391,044	4,010,386	563,219	3,048,908	641,329	2,335,399	177,176
OTHER	174,950	3,265	1,251,129	31,790	0	12,342	686,768	16,186
<b>TOTALS</b>	<b>28,652,553</b>	<b>8,427,835</b>	<b>22,045,086</b>	<b>10,356,567</b>	<b>6,226,533</b>	<b>2,255,330</b>	<b>9,785,432</b>	<b>4,413,501</b>

Source: Administrative Committee for Pistachios Inventory/Shipment Reports.



# EXPORTS BY DESTINATION IN POUNDS

Years Ended August 31

	KERNELS				TOTALS			
COUNTRY	2019/2020	2020/2021	2021/2022	2022/2023	2019/2020	2020/2021	2021/2022	2022/2023
ALGERIA		60,000	39,180		353,346	1,101,336	1,500,285	170,000
ARGENTINA	457		39,600	25,890	95,005	44,000	178,146	69,890
AUSTRALIA	1,040,425	420,323	440,765	198,990	5,015,860	3,416,862	3,388,282	1,335,607
BAHRAIN					0	0	0	310,750
BELGIUM	44,000	388,115	255,815	252,000	10,349,915	12,463,563	8,703,332	1,346,671
BOSNIA AND HERZGOVINA				6,600	0	0	0	74,600
BRAZIL	39,846	28,086	51,863	108,361	337,920	177,647	278,774	245,092
BULGARIA					245,950	451,800	675,725	128,975
CANADA	3,065,789	3,245,847	3,319,258	1,142,318	19,163,021	21,881,223	22,048,644	7,433,598
CHILE	13,950	24,035	22,550	10,700	429,094	1,533,577	1,320,107	236,965
CHINA	759,888	168,420	961,674	48,274	83,661,447	126,481,546	152,338,096	78,800,772
COLOMBIA	2,400	9,595	11,050	9,990	737,922	630,186	652,713	275,090
COSTA RICA		9,000	4,500		64,585	81,170	39,500	25,000
CYPRUS	4,200	12,000	11,070	6,000	156,600	172,000	102,820	53,000
CZECH REPUBLIC	29,500		17,580	6,000	417,500	1,278,013	1,919,569	572,000
DENMARK	0	0	0		0	0	0	0
ECUADOR	3,000	8,700	5,500	12,000	139,000	268,450	300,689	59,400
EGYPT					2,093,077	3,622,725	2,497,623	1,499,079
ESTONIA					0	0	0	1,364,000
FR. POLYNESIA (TAHITI)					0	0	0	0
FRANCE	606,170	400,970	88,529	132,710	7,373,376	8,343,520	10,546,346	2,417,470
GEORGIA					0	0	0	524,930
GERMANY	1,906,218	1,932,508	2,977,619	451,765	59,690,287	78,838,848	81,525,973	9,876,376
GREECE	22,200	1,932,508			433,200	214,000	762,925	174,000
GUATEMALA		64	2,948		32,000	50,138	78,596	32,594
HONG KONG	269,142	11,100	9,096	11,450	40,813,699	31,464,705	21,873,877	12,899,744
INDIA	1,499,100	852,000	2,250,600	615,555	4,851,450	8,359,595	20,314,582	11,622,583
INDONESIA					52,006	60,231	147,086	76,151
ISRAEL	552,610	168,420	570,050	120,550	7,276,352	9,086,638	10,532,740	3,603,359
ITALY	1,182,451	610,720	1,030,860	1,275,120	9,442,808	11,639,375	14,282,729	7,131,973
JAPAN	661,410	1,640,320	2,736,720	371,400	4,378,385	5,937,189	8,466,660	1,787,425
JORDAN				884,280	0	0	0	2,215,480
KOREA	397,665	605,270	561,670	165,680	1,802,836	2,660,970	3,044,064	546,248
KUWAIT					0	0	0	307,500
LATVIA					253,234	194,571	309,140	93,975
LEBANON		78,950	103,200		161,350	78,950	619,350	221,500
LITHUANIA	44,275				2,297,110	2,947,154	5,019,884	1,225,715
LUXEMBOURG	645,064	175,676			4,604,651	14,426,895	3,256,000	1,273,800
MALAYSIA	9,203	9,000	9,600		798,743	1,624,119	1,484,545	374,985
MEXICO	114,971	114,954	327,692	138,542	6,252,640	9,833,070	12,776,502	5,988,606
MOROCCO					0	0	0	641,250
NETHERLANDS	908,395	815,200	1,116,140	146,000	7,111,425	14,380,337	14,797,569	3,791,600
NEW ZEALAND	26,813	36,510	12,900	17,670	696,378	958,228	759,350	357,170
NORWAY	25,000	49,000	66,000	7,000	350,550	436,125	660,868	157,050
PERU					286,925	622,417	483,067	262,775
PHILIPPINES				15,580	0	0	0	166,708
POLAND				19,000	2,813,650	4,379,160	6,959,730	1,359,551
PORTUGAL		68,400			531,531	991,650	88,000	44,000
QATAR					0	0	0	42,000
ROMANIA					203,122	129,800	513,200	130,000
RUSSIA	39,000	40,710	40,710		298,000	44,010	176,010	0
SAUDI ARABIA	258,000	377,790			12,742,010	13,436,353	17,734,971	5,022,236
SINGAPORE	10,996	20,400	43,470	16,841	529,263	539,182	896,472	686,147
SOUTH AFRICA	80,818	5,190	19,560	5,850	457,068	683,565	1,545,946	928,989
SPAIN	2,100	47,340	18,226	41,800	24,612,898	24,993,756	26,678,181	6,812,909
SWEDEN					375,750	0	276,800	70,100
SWITZERLAND	124,000				1,456,000	1,896,000	1,684,000	438,000
TAIWAN	29,300		30	21,000	1,544,742	1,816,800	1,623,930	1,671,055
THAILAND	156,300	316,920	425,670	1,500	822,100	1,298,345	1,884,820	378,121
TURKEY	1,510,005	3,427,239	15,733,623	3,436,488	5,964,208	7,134,563	41,946,780	13,226,094
UKRAINE		3,427,239			1,317,175	2,098,520	566,500	43,000
UNITED ARAB EMIRATES	46,948		143,084	42,000	3,459,891	4,934,850	12,861,461	6,394,755
UNITED KINGDOM	1,163,140	1,051,220	1,049,910	86,800	8,352,318	11,528,249	10,439,275	3,331,223
VENEZUELA		1,051,220	2,100		0	22,000	214,600	0
VIETNAM	464,301	1,087,940	1,860,604	822,390	11,667,352	10,416,467	19,772,218	7,777,017
OTHER	1,969,588	1,302,798	3,014,968	14,142	6,551,605	7,266,972	19,651,804	1,373,346
TOTALS	19,728,638	19,620,730	39,395,984	10,688,236	365,918,330	469,371,415	573,200,856	211,499,999

Source: Administrative Committee for Pistachios Inventory/Shipment Reports.

# EXPORT MARKET OUTLOOK



**Ali Amin**

Marketing Communications  
Committee Chairman

The pistachio industry did well in most export markets during 2020 and 2021 (COVID years). People were under lockdown and could only go to the supermarket for food. They stayed home and snacked more which benefited pistachio consumption. Global logistics congestion was a hindrance as COVID lockdowns were easing. COVID and supply chain issues were all resolved before the 2022 crop. Ocean freight rates to most destinations are now back to pre-COVID rates.

More than two decades ago, the California Pistachio Export Council (CPEC) was formed under the Export Trading Corporation (ETC) Act of 1982. The initial purpose of ETC was for smaller producers to aggregate their produce and market it collectively. Today, it's a vehicle for producers to discuss export market conditions and other variables that impact demand. These variables could be inflation, exchange rates, global economic conditions, and supply from other origins.

CPEC is a platform for the exchange of information in export markets. Their purpose is to bring about market transparency with the objective of achieving market stability given the many changes that occur throughout

any crop year. CPEC currently has 8 members who are producers, processors, and exporters of U.S. pistachios. They are members of American Pistachio Growers and serve on various committees within the organization.

Experienced growers in the tree nut industry understand every year is unique, requiring a fresh look at supply and demand conditions each year. For example, the U.S. 2022 crop at 884 million pounds was much less than expected for an "On Crop" year. However, with the carry-over in inventory, the available supply was 1.2 billion inshell equivalent pounds. The industry successfully marketed and shipped 1.04 billion inshell pounds leaving less than 200 million inshell pounds of carry-over inventory.

Over the past two decades, the export rate of growth has outpaced domestic growth. As an example, 2022 total shipments increased by 7% over 2021. Export shipments increased by 23% over the same period. This trend of export demand growing faster than the domestic demand is expected to continue for the foreseeable future. Export shipments for the first three months of the 2023 – 2024 marketing years have increased by 49% as compared to domestic shipments increasing by 5% during the same period.

With about 100,000 non-bearing acres, we can and should expect a 2 billion pound crop within the next 7 years. CPEC members will continue to be vigilant and monitor the export markets while supporting APG and the industry in increasing demand in existing markets as well as opening new markets.





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# MEMBER PROCESSORS/ SUPPLIERS

CONTACT THESE 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
Arizona Nut Company 410 W. Pistachio Lane   Bowie, AZ 85605 559.458.7272   info@meridiangrowers.com meridiangrowers.com	•	•	•	•	•			•		•						•					•	•	
Buchanan Hollow Nut Co. 6510 Minturn Road   Le Grand, CA 95333 209.389.4594   bradrobson@yahoo.com BHNC.com	•	•	•	•	•	•	•	•	•	•	•	•		•		•	•	•			•	•	•
Eagle Ranch Pistachios 7288 Highway 54/70   Alamogordo, NM 88310 800.432.0999   sales@heartofthedesert.com heartofthedesert.com	•	•	•		•	•	•	•	•		•	•				•	•	•	•		•		
Eriksson LLC/Ingleby USA P.O. Box 6280   Visalia, CA 93290 559.635.3138   grs@inglebyfarms.com dll@inglebyfarms.com	•	•		•				•		•						•						•	
Horizon Nut LLC 26487 N. Hwy 99   Tulare, CA 93274 559.685.3663   tbagato@horizonnut.com horizonnut.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•	•	•	•	•	•	
Keenan Farms, Inc. 31510 Plymouth Avenue   Kettleman City, CA 93204 559.945.1400   info@keenanfarms.com keenanfarms.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•	•	•		•	•	
Meridian Growers 1625 Howard Road, #280   Madera, CA 93637 559.458.7272   info@meridiangrowers.com meridiangrowers.com	•	•	•	•	•	•	•	•	•	•	•	•				•					•	•	•

■ Roasted\*    ■ Specialty\*\*



# MEMBER PROCESSORS/ SUPPLIERS

The American Pistachio Growers leadership would like to formally acknowledge the considerable, consistent support of our Member Processors. These partnerships are 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.

				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
<b>Monarch Nut Company</b>  786 Road 188   Delano, CA 93215 661.725.6458   kamie@monarchnut.com mungerfarms.com	•	•	•	•	•	•	•	•	•	•	•	•	•			•	•	•	•		•	•	•
<b>Nichols Farms</b>  13762 First Avenue   Hanford, CA 93230 559.584.6811   sales@nicholsfarms.com nicholsfarms.com	•	•	•	•	•	•	•	•	•	•	•	•		•		•	•	•	•		•	•	•
<b>Primex Farms, LLC</b>  16070 Wildwood Road   Wasco, CA 93280 661.758.7790   info@primexfarms.com primexfarms.com	•	•	•	•	•	•	•	•	•	•	•	•				•	•	•	•		•	•	
<b>Setton Pistachio of Terra Bella, Inc.</b>  P.O. Box 11089 9370 Road 234   Terra Bella, CA 93270 559.535.6050   info@settonfarms.com settonfarms.com	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•
<b>Touchstone Pistachio Company</b>  5260 N. Palm Avenue, Suite 421   Fresno, CA 93704 559.470.3510   charlotte.avila@touchstonepistachio.com	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•	•	•
<b>Zymex Industries, Inc.</b>  168 Hawk Drive   Merced, CA 95341 209.722.2770   info@zymex.com zymex.com	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•					•	•	

■ Roasted\*
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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 2024**  
#FORWARDTOGETHER

## FOR GROWER INFORMATION CONTACT

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Tobin Martin

[tobin.martin@touchstonepistachio.com](mailto:tobin.martin@touchstonepistachio.com)

**(559) 269-2196**





## OUR FACILITY

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*Since 1986*



## *Family Values You Can Count On*

- Family-owned and operated for over 35 years, with a second generation in place for over 20 years.
- Invested in the industry's future, Setton Pistachio's continuous expansion and cutting-edge automation ensure a home for every pistachio.
- With over 100 years of combined pistachio growing experience and in-house proprietary technology applications, our grower team will help you maximize your crop quality and yield.
- You can count on us; when you're one of our growers, our expertise and relationships become yours.

Contact our Grower Services 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

