



# NEWSLETTER

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**September 2013**

## Almond Industry Position Report

**August 2013**

Million Lbs

Carry-in August 1, 2013 .....	317.2
2012 Net Marketable Crop (Received to date) .....	240.4
Total Supply .....	557.6
<b>Sold Shipped &amp; Not Shipped</b>	
Domestic.....	249.1
Export.....	396.8
Total Sold.....	645.9
Uncommitted Inventory (Not Sold).....	88.3

### Position Report

Shipments of California Almonds pushed out of the gate with force by shipping 147.9 million pounds for August. Last year for the same month, our industry shipped 139.6 million pounds.

### 2013 Crop Harvest

Harvest began 8-10 days earlier than last year. Nonpareil production appears to be tracking 8 to 10 percent ahead of the N.A.S.S. Objective Estimate. Nonpareil quality is very good. Rejects are averaging slightly over 1 percent. Sizes are smaller than last year by two to three sizes. A little over 30 percent of the Nonpareil crop is sizing out at 30 count and smaller. By far the most common size is 27/30's in Nonpareil. Crack-out percentages on Nonpareils are 2 to 3 percent better than last year. Nonpareil kernels are a pretty golden color that buyers like. At this early stage, the Cal Crop is tracking lighter than the N.A.S.S. objective estimate by 8-10 percent. Crack-out percentages are off on Cals by 2 to 3 percent from last year. Sizing continues to be a problem in all Cal varieties with the exception of Monterey. It appears that the percentage of Nonpareils might be up and Cals will be down giving our industry a crop very similar to last year. All Cal varieties are currently being harvested. If weather cooperates, the state's entire almond crop should be, at the very least, in stock-piles by mid-October.

### The Market

What a difference a week makes! With the opinion that the pollinator varieties are lighter than expected, market sentiment has turned the corner in the past week. Previously, prices had been softening each day as more aggressive sellers entered the market. Currently as more buyers are entering the market, sellers are retreating or being more cautious in their selling. As such, prices have pushed up 8-10 cents per pound over the past week. Sellers and end users have come to a better price acceptance on readily available items. Sales activity is stable and should remain active.

### Grower Received Summary

To receive USDA incoming information as soon as possible, we will email or fax your results. In addition, your field representative also receives the reports. Grower information is confidential, so please contact your field representative with any questions.

### Reminder

If you wish to defer delivery payments, please get your deferment form into our office ASAP.

*"Buyer & Seller of Quality California Almonds"*