



Almond Board of California

1150 9th Street, Suite 1500 Modesto, CA 95354 USA Tel 209.549.8262 Fax 209.549.8267

September 10, 2008

Dear Industry Members,

Attached you will find the Position Report for the month of August 2008.

Please note that the Beginning Inventory/Carryin figure for 8/1/2008 reflects the actual Loss and Exempt (L&E) figure for the 2007/2008 crop year. The actual L&E of 1.78% versus the 3% forecasted L&E figure resulted in an upward adjustment of 16,829,578 pounds to the 8/1/2008 beginning inventory for a total of 231,151,418 pounds. Attached is a graph of historical L&E, along with historical receipts and shipments percentages by date.

I would also like to note that the forecasted L&E on the monthly Position Report will remain at 3%.

Best regards,

Sue Olson
Associate Director, Statistics & Compliance



Almond Board of California

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Almond Industry Position Report

August 2008

2008-2009 Crop Year

Salable	Forecast Million Lbs.	2008-2009	2007-2008	% Change
		8/1 - 08/31 Kernel Wt.	8/1 - 08/31 Kernel Wt.	
1. Carryin August 1, 2008	231.2	231,151,418	133,949,675 *	72.57%
2. Crop Receipts to Date	1,500.0	114,056,689	153,703,550	-25.79%
3. [3% Loss and Exempt]	<u>45.0</u>	(3,421,701)	(4,611,107)	
4. New Crop Marketable (2-3)	1,455.0	110,634,988	149,092,444	-25.79%
5. [Reserve]	n/a	<u>0</u>	<u>0</u>	
6. Total Supply (1+4-5)	<u>1,686.2</u>	<u>341,786,406</u>	<u>283,042,119</u>	20.75%
Shipments by Handlers				
7. Domestic	425.0	33,290,079	34,850,775	-4.48%
8. Export	<u>935.0</u>	<u>63,385,711</u>	<u>59,846,042</u>	5.91%
9. Total Shipments	1,360.0	<u>96,675,790</u>	<u>94,696,817</u>	2.09%
10. Forecasted Carryout	<u>326.2</u>			
11. Computed Inventory (6-9)		<u>245,110,616</u>	<u>188,345,302</u>	30.14%
Commitments (sold, not delivered)**				
12. Domestic		170,248,630	111,975,281	52.04%
13. Export		<u>226,495,145</u>	<u>170,471,348</u>	32.86%
14. Total Committed Shipments		<u>396,743,775</u>	<u>282,446,629</u>	
15. Uncommitted Inventory (11-14)		<u>-151,633,159</u>	<u>-94,101,328</u>	61.14%

**75% of handlers reported commitments, representing 81.0% of the 2007/2008 crop

		MONTHLY REPORT OF SALABLE HANDLER SHIPMENTS			
		2008-2009 Crop Year		2007-2008 Crop Year	
		8/1 - 8/31	8/1 - 8/31	8/1 - 8/31	8/1 - 8/31
DOMESTIC	Shelled	22,076,828	22,076,828	24,051,799	24,051,799
	Manufactured	13,646,107	13,646,107	12,609,057	12,609,057
	Products	117,844	117,844	165,945	165,945
	Inshell	1,168,467	1,168,467	549,795	549,795
	(Interhandler Transfers)	(2,851,330)	(2,851,330)	(1,493,405)	(1,493,405)
	(Industry Purchases)	(<u>867,837</u>)	(<u>867,837</u>)	(<u>1,032,416</u>)	(<u>1,032,416</u>)
	TOTAL:	<u>33,290,079</u>	<u>33,290,079</u> 34%	<u>34,850,775</u>	<u>34,850,775</u> 37%
EXPORT	Shelled	42,707,534	42,707,534	32,917,230	32,917,230
	Manufactured	10,501,699	10,501,699	10,937,388	10,937,388
	Products	409	409	10,573	10,573
	Inshell	<u>10,176,069</u>	<u>10,176,069</u>	<u>15,980,851</u>	<u>15,980,851</u>
	TOTAL:	<u>63,385,711</u>	<u>63,385,711</u> 66%	<u>59,846,042</u>	<u>59,846,042</u> 63%
NET SHIPMENTS		<u>96,675,790</u>	<u>96,675,790</u> 100%	<u>94,696,817</u>	<u>94,696,817</u> 100%
EXEMPT/INEDIBLE SHIPMENTS		<u>2,574,635</u>	<u>2,574,635</u>	<u>4,754,271</u>	<u>4,754,271</u>

EXPORT DELIVERIES BY DESTINATION
(Kernel Weight)

+/-	Crop Year 2008-2009 8/01/08 through 08/31/08				Crop Year 2007-2008 8/01/07 through 08/31/07						
	Country	Shelled	Inshell	%	Country	Shelled	Inshell	%			
North America 3.95%	-35%	Canada	2,103,328	68	3.32%	Canada	3,158,267	438	5.28%		
		Mexico	402,975	0	0.64%	Mexico	719,730	0	1.20%		
		Total	2,506,303	68		Total	3,877,997	438			
Central America 0.02%	n/a	Guatemala	***	0	0.00%	Guatemala	***	0	0.00%		
		Others	14,000	0	0.02%	Others	***	0	0.03%		
		Total	14,000	0		Total	0	0			
Caribbean 0.00%	n/a	Trinidad	***	0	0.00%	Trinidad	***	0	0.00%		
		Others	***	0	0.00%	Others	***	0	0.00%		
		Total	0	0		Total	0	0			
South America 0.52%	-13%	Chile	269,000	0	0.42%	Chile	296,900	0	0.50%		
		Others	58,837	0	0.09%	Others	80,000	0	0.13%		
		Total	327,837	0		Total	376,900	0			
Western Europe 58.43%	28%	Austria	174,000	0	0.27%	Austria	220,000	0	0.37%		
		Belgium	2,235,850	0	3.53%	Belgium	1,221,600	0	2.04%		
		Denmark	352,309	0	0.56%	Denmark	793,106	0	1.33%		
		Finland	171,600	0	0.27%	Finland	178,125	0	0.30%		
		France	2,898,100	0	4.57%	France	3,000,600	0	5.01%		
		Germany	10,579,831	0	16.69%	Germany	7,406,799	0	12.38%		
		Greece	2,282,500	0	3.60%	Greece	733,700	31,896	1.28%		
		Italy	1,379,750	14,940	2.20%	Italy	460,000	83,355	0.91%		
		Netherlands	2,886,105	0	4.55%	Netherlands	1,719,574	0	2.87%		
		Norway	550,000	0	0.87%	Norway	320,075	0	0.53%		
		Portugal	***	0	0.00%	Portugal	***	0	0.00%		
		Spain	10,762,447	0	16.98%	Spain	10,103,131	0	16.88%		
		Sweden	1,083,407	0	1.71%	Sweden	715,400	0	1.20%		
		Switzerland	260,250	0	0.41%	Switzerland	174,146	0	0.29%		
		United Kingdom	1,292,588	0	2.04%	United Kingdom	1,611,140	0	2.69%		
		Others	113,400	0	0.18%	Others	88,000	0	0.15%		
		Total	37,022,137	14,940		Total	28,745,396	115,251			
Eastern Europe 4.61%	#NAME?	Bulgaria	***	0	0.00%	Bulgaria	***	0	0.00%		
		Croatia	129,000	0	0.20%	Croatia	***	0	0.00%		
		Czech Republic	394,000	0	0.62%	Czech Republic	***	0	0.00%		
		Latvia	264,000	0	0.42%	Latvia	174,000	0	0.29%		
		Lithuania	***	0	0.00%	Lithuania	0	0	0.00%		
		Poland	132,750	0	0.21%	Poland	***	0	0.00%		
		Russia	1,580,050	0	2.49%	Russia	924,300	0	1.54%		
		Ukraine	***	0	0.00%	Ukraine	0	0	0.00%		
		Others	423,300	0	0.67%	Others	427,550	0	0.71%		
		Total	2,923,100	0		Total	1,525,850	0			
Middle East 6.44%	32%	Bahrain	***	0	0.00%	Bahrain	0	0	0.00%		
		Israel	388,750	0	0.61%	Israel	229,950	0	0.38%		
		Jordan	***	28,404	0.04%	Jordan	147,000	0	0.25%		
		Kuwait	119,250	0	0.19%	Kuwait	***	0	0.00%		
		Lebanon	***	0	0.00%	Lebanon	0	0	0.00%		
		Saudi Arabia	218,500	0	0.34%	Saudi Arabia	132,000	0	0.22%		
		Turkey	44,000	993,202	1.64%	Turkey	80,000	159,703	0.40%		
		United Arab Emirates	1,941,000	213,083	3.40%	United Arab Emirates	2,214,800	111,365	3.89%		
		Others	137,000	0	0.22%	Others	26,456	0	0.04%		
		Total	2,848,500	1,234,689		Total	2,830,206	271,068			
Asia 23.21%	-31%	China	918,176	59,488	1.54%	China	643,087	106,261	1.25%		
		India	1,219,224	8,839,884	15.87%	India	1,257,871	15,456,441	27.93%		
		Indonesia	74,750	0	0.12%	Indonesia	***	0	0.00%		
		Japan	1,388,450	0	2.19%	Japan	1,911,209	0	3.19%		
		Malaysia	185,750	0	0.29%	Malaysia	144,175	0	0.24%		
		Pakistan	181,450	0	0.29%	Pakistan	***	0	0.00%		
		Philippines	***	0	0.00%	Philippines	0	0	0.00%		
		Singapore	***	0	0.00%	Singapore	393,380	0	0.66%		
		South Korea	1,270,730	0	2.00%	South Korea	947,800	0	1.58%		
		Taiwan	167,360	0	0.26%	Taiwan	87,620	31,392	0.20%		
		Thailand	300,425	0	0.47%	Thailand	161,050	0	0.27%		
		Vietnam	***	***	0.00%	Vietnam	0	0	0.00%		
		Others	80,750	27,000	0.17%	Others	135,500	0	0.23%		
	Total	5,787,065	8,926,372		Total	5,681,692	15,594,094				
New Zealand 0.17%	-22%	New Zealand	Total	108,950	0	0.17%	New Zealand	Total	139,250	0	0.23%
Australia 0.00%	n/a	Australia	Total	***	0	0.00%	Australia	Total	134,950	0	0.23%
Africa 2.22%	194%	Algeria	858,950	0	1.36%	Algeria	***	0	0.00%		
		Egypt	***	0	0.00%	Egypt	***	0	0.00%		
		Morocco	220,000	0	0.35%	Morocco	***	0	0.00%		
		South Africa	241,400	0	0.38%	South Africa	256,850	0	0.43%		
		Others	88,000	0	0.14%	Others	222,000	0	0.37%		
	Total	1,408,350	0		Total	478,850	0				
Others 0.42% 100.00%	n/a	Others	Total	263,400	0	0.42%	Others	Total	74,100	0	0.12%
	TOTAL DELIVERIES	53,209,642	10,176,069	100.00%	TOTAL DELIVERIES	43,865,191	15,980,851	100.00%			

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



**Almond Board of California
Quality Control Receipts Report
Industry Summary
August 1, 2008 through August 31, 2008**

Variety Name	From ABC Form 1 Total Receipts	From USDA Inspection Certificates		% of Total Receipts	% Rejects
		Total Receipts	Total Inedibles		
Aldrich	0	114,536	1,841	0.00%	1.61%
Avalon	0	0	0	0.00%	0.00%
Butte	840,976	6,294	14	0.74%	0.22%
Butte/Padre	220,475	799,608	35,441	0.19%	4.43%
Carmel	14,152	387,512	13,585	0.01%	3.51%
Carrion	0	0	0	0.00%	0.00%
Fritz	0	0	0	0.00%	0.00%
Harvey	0	0	0	0.00%	0.00%
Hashem	0	0	0	0.00%	0.00%
Le Grand	0	0	0	0.00%	0.00%
Livingston	0	0	0	0.00%	0.00%
Marchini	0	2,817	117	0.00%	4.15%
Merced	0	0	0	0.00%	0.00%
Mission	0	0	0	0.00%	0.00%
Mixed	99,415	283,983	16,373	0.09%	5.77%
Mono	88,031	88,031	600	0.08%	0.68%
Monterey	0	0	0	0.00%	0.00%
Morley	0	0	0	0.00%	0.00%
N43	0	0	0	0.00%	0.00%
Neplus	4,764	0	0	0.00%	0.00%
Nonpareil	111,754,521	116,010,019	1,280,924	97.98%	1.10%
Padre	273,477	959,045	2,890	0.24%	0.30%
Peerless	11,845	0	0	0.01%	0.00%
Price	292,005	491,876	3,055	0.26%	0.62%
Ruby	0	0	0	0.00%	0.00%
Sauret	0	0	0	0.00%	0.00%
Savana	0	0	0	0.00%	0.00%
Sonora	213,623	479,643	8,799	0.19%	1.83%
Thompson	0	0	0	0.00%	0.00%
Tokyo	70,725	70,725	763	0.06%	1.08%
Winters	0	0	0	0.00%	0.00%
Wood Colony	172,680	476,167	6,271	0.15%	1.32%
Major Varieties Sub Total:	114,056,689	120,170,256	1,370,673	100.00%	1.14%
Minor Varieties Total:	0	0	0	0.00%	0.00%
Grand Total All Varieties	114,056,689	120,170,256	1,370,673	100.00%	1.14%

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

Almond Board of California

Domestic	Difference	08/09	07/08	06/07	05/06	04/05	03/04	02/03	01/02
August	-4.5%	33.29	34.85	27.27	24.72	29.56	24.58	19.66	18.11
September			33.98	32.59	26.94	31.31	26.89	26.57	19.80
October			41.28	43.99	33.99	34.74	32.39	32.80	26.60
November			41.80	35.17	28.42	31.47	25.64	31.10	22.30
December			23.96	29.35	22.40	28.02	27.24	23.30	19.90
January			29.11	24.64	20.87	24.21	21.59	23.50	20.80
February			29.25	26.13	18.83	23.57	21.76	21.50	17.20
March			32.70	28.44	25.63	27.29	27.51	23.50	20.00
April			33.09	30.11	23.64	21.87	23.88	31.70	22.60
May			27.89	31.04	26.93	27.52	27.39	25.00	20.60
June			33.57	32.12	27.86	27.73	27.60	21.29	15.00
July			33.29	27.48	23.63	24.27	25.69	11.80	16.40
Total		33.3	394.8	368.3	303.9	331.55	312.16	291.72	239.31

Export	Difference	08/09	07/08	06/07	05/06	04/05	03/04	02/03	01/02
August	5.9%	63.39	59.85	31.45	32.72	49.12	42.03	34.30	42.40
September			88.01	77.78	54.59	83.37	71.99	85.70	80.60
October			118.67	106.39	77.94	95.10	112.52	94.90	92.50
November			87.72	76.30	61.12	71.92	71.12	81.00	56.30
December			70.58	64.84	53.92	61.16	66.36	65.90	50.70
January			68.01	60.58	42.46	53.40	55.45	57.60	48.00
February			56.72	46.95	43.32	45.49	53.94	45.20	40.80
March			58.32	42.12	55.72	48.00	54.48	41.00	37.80
April			62.49	41.00	46.50	36.24	47.46	40.20	34.30
May			60.61	45.67	52.96	39.81	41.89	44.50	33.80
June			69.15	50.16	52.52	38.38	46.14	52.60	39.10
July			66.27	54.56	36.61	30.54	48.73	47.70	25.50
Total		63.4	866.4	697.8	610.4	652.5	712.1	690.6	581.8

Net	Difference	08/09	07/08	06/07	05/06	04/05	03/04	02/03	01/02
August	2.1%	96.68	94.70	58.71	57.44	78.68	66.62	54.00	60.50
September			121.99	110.37	81.53	114.68	98.88	112.27	100.41
October			159.95	150.38	111.93	129.84	144.91	127.70	119.11
November			129.52	111.47	89.55	103.39	96.76	112.10	78.57
December			94.54	94.19	76.32	89.18	93.61	89.20	70.63
January			97.12	85.22	63.33	77.61	77.05	81.10	68.74
February			85.98	73.07	62.15	69.06	75.70	66.70	58.04
March			91.02	70.56	81.36	75.29	81.99	64.50	57.76
April			95.58	71.11	70.14	58.11	71.34	71.90	56.96
May			88.50	76.71	79.88	67.34	69.28	69.50	54.44
June			102.72	82.29	80.38	66.11	73.73	73.89	54.11
July			99.55	82.04	60.24	54.81	74.42	59.50	41.88
		96.7	1,261.2	1,066.1	914.2	984.1	1,024.3	982.4	821.1

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

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

