



Almond Board of California  
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December 11, 2002

Dear Industry Members,

I am writing this letter in the form of a cover letter for the November position report. I want to update you on the progress that we have made in improving the report preparation process since I last wrote to you on November 12<sup>th</sup>, 2002.

- 1) We have conducted a thorough review of the existing checks and balances. We have streamlined the data input procedure, eliminating a cumbersome process, which was prone to human error.
- 2) We have made excellent progress in automating the system to the extent possible. By creating the final report within the Access software we have eliminated the manual transposition of the final report numbers from the Access database to the Excel software. The final report numbers are now generated automatically within one software program. Our continuing goal is to automate the export page, improving the quality and presentation of the data in the report.
- 3) We continue to manually check all final report calculations and are double-checking that the "source document" numbers are tracking correctly to the summary page presentation that you receive.
- 4) I am now signing off on the report in addition to the staff members who prepare the report.

Please remember that getting the position report to you as soon as possible requires that all handlers send in forms 1 and 25 by the 5<sup>th</sup> calendar day of each month. This month, for instance, we received the forms from two handlers with significant volume late on Monday Dec. 9<sup>th</sup>, causing delays in compiling the report.

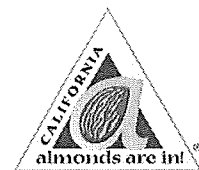
All ABC staff involved in the preparation of the monthly position report are fully committed to assuring that the report is prepared with the highest level of statistical accuracy and integrity. We all understand the importance of this document and the negative commercial impact that errors in the report can cause in the industry. While we are not perfect, you can rest assured that we will always do our very best.

Please feel free to call me at any time concerning this matter.

Sincerely,

Richard Waycott  
President & CEO

cc: All Staff



# Almond Industry Position Report

November 2002

## 2002-2003 Crop Year

Salable	Forecast Million Lbs.	2002-2003	2001-2002	% Change
		8/1 - 11/30 Kernel Wt.	8/1 - 11/30 Kernel Wt.	
1. Carryin August 1, 2002	80.9	80,922,480 *	107,265,860	-24.56%
2. Crop Receipts to Date	980.0	952,414,410	768,308,579	23.96%
3. [4% Loss Exempt]	39.2	( 38,096,576 )	( 30,732,343 )	
4. New Crop Marketable (2-3)	940.8	914,317,834	737,576,236	
5. [Reserve]	n/a	0	0	
6. Total Supply (1+4-5)	1021.7	995,240,314	844,842,096	17.80%
<b>Shipments by Handlers</b>				
7. Domestic	245.0	110,105,369	86,862,001	26.76%
8. Export	620.0	295,938,837	271,755,954	8.90%
9. Total Shipments	865.0	406,044,206	358,617,955	
10. Forecasted Carryout	156.7			
11. Computed Inventory (6-9)		589,196,108	486,224,141	21.18%
<b>Commitments (sold, not delivered)**</b>				
12. Domestic		111,299,665	116,414,147	-4.39%
13. Export		140,273,724	110,740,738	26.67%
14. Total Committed Shipments		251,573,389	227,154,885	
15. Uncommitted Inventory (11-14)		337,622,719	259,069,256	30.32%

\* Subject to verification through handler audits

\*\*85% of handlers reported commitments, representing 87% of last year's crop

### MONTHLY REPORT OF SALABLE HANDLER SHIPMENTS

	2002-2003 Crop Year		2001-2002 Crop Year		
	11/1 - 11/30	8/1 - 11/30	11/1 - 11/30	8/1 - 11/30	
<b>DOMESTIC</b>					
Shelled	26,307,464	91,789,810	21,065,669	77,303,193	
Manufactured	7,507,045	30,178,586	7,252,803	29,874,197	
Products	161,097	917,228	241,978	758,492	
Inshell	712,519	3,505,118	786,167	4,241,184	
(Interhandler Transfers)	( 1,558,880 )	( 7,724,917 )	( 1,536,768 )	( 9,185,985 )	
(Industry Purchases)	( 2,034,211 )	( 8,560,456 )	( 5,523,070 )	( 16,129,080 )	
TOTAL:	31,095,034	110,105,369	22,286,779	86,862,001	24%
<b>EXPORT</b>					
Shelled	56,598,345	221,015,336	38,094,210	191,819,314	
Manufactured	11,167,982	37,596,010	8,659,615	42,816,939	
Inshell	13,201,915	37,327,491	9,525,847	37,119,701	
TOTAL:	80,968,242	295,938,837	56,279,672	271,755,954	76%
<b>NET SHIPMENTS</b>	112,063,276	406,044,206	78,566,451	358,617,955	100%
<b>EXEMPT/INEDIBLE SHIPMENTS</b>	75,371	3,958,582	1,168,758	5,146,426	

**EXPORT DELIVERIES BY DESTINATION**

(Kernel Weight)

		Crop Year 2002-2003 08/01/02 through 11/30/02			Crop Year 2001-2002 08/01/01 through 11/30/01					
	Country	Shelled	Inshell	%	Country	Shelled	Inshell	%		
North America	Canada	11,873,518	295,440	4.11%	Canada	9,573,698	362,395	3.66%		
	Mexico	4,093,969	0	1.38%	Mexico	4,104,745	3,133	1.51%		
	Total	15,967,487	295,440		Total	13,678,443	365,528			
Central America	Costa Rica	60,950	0	0.02%	Costa Rica	47,853	573	0.02%		
	Others	52,600	420	0.02%	Others	8,260	578	0.00%		
Total		113,550	420		Total	56,113	1,151			
Caribbean	Others	16,831	10,150	0.01%	Others	15,641	0	0.01%		
	Total	16,831	10,150		Total	15,641	0			
South America	Argentina	81,000	15,400	0.03%	Argentina	58,520	108,850	0.06%		
	Brazil	181,800	50,726	0.08%	Brazil	50,938	143,008	0.07%		
	Chile	398,470	0	0.13%	Chile	***	0	0.00%		
	Colombia	***	0	0.00%	Colombia	***	0	0.00%		
	Ecuador	***	0	0.00%	Ecuador	***	0	0.00%		
	Peru	***	0	0.00%	Peru	***	0	0.00%		
	Venezuela	455,590	0	0.15%	Venezuela	550,077	0	0.20%		
	Others	161,957	0	0.05%	Others	298,754	0	0.11%		
Total	1,278,817	66,126		Total	958,289	251,858				
Western Europe	Austria	447,660	0	0.15%	Austria	268,638	0	0.10%		
	Belgium	11,192,240	0	3.78%	Belgium	16,571,020	0	6.10%		
	Denmark	4,040,429	0	1.37%	Denmark	4,467,508	0	1.64%		
	Finland	422,050	0	0.14%	Finland	464,025	0	0.17%		
	France	14,294,539	40,691	4.84%	France	10,870,636	34,499	4.01%		
	Germany	41,163,041	58,700	13.93%	Germany	43,973,594	36,189	16.19%		
	Greece	4,992,950	148,685	1.74%	Greece	2,244,250	222,040	0.91%		
	Ireland	***	0	0.00%	Ireland	***	0	0.00%		
	Italy	14,877,034	949,262	5.35%	Italy	10,072,725	134,330	3.76%		
	Malta & Gozo	***	0	0.00%	Malta & Gozo	***	0	0.00%		
	Netherlands	12,822,435	144	4.33%	Netherlands	13,319,101	0	4.90%		
	Norway	2,728,230	0	0.92%	Norway	2,214,649	7,350	0.82%		
	Portugal	***	0	0.00%	Portugal	606,400	0	0.22%		
	Spain	46,331,475	0	15.66%	Spain	39,855,084	0	14.67%		
	Sweden	2,470,525	0	0.83%	Sweden	3,260,700	0	1.20%		
	Switzerland	1,289,375	0	0.44%	Switzerland	2,285,730	0	0.84%		
	United Kingdom	7,464,690	0	2.52%	United Kingdom	7,742,584	0	2.85%		
	Others	333,548	0	0.11%	Others	110,250	0	0.04%		
Total	164,870,221	1,197,482		Total	158,326,894	434,408				
Eastern Europe	Bulgaria	467,350	187	0.16%	Bulgaria	145,000	0	0.05%		
	Croatia	***	***	0.00%	Croatia	124,000	0	0.05%		
	Czech Republic	3,074,075	0	1.04%	Czech Republic	1,237,704	0	0.46%		
	Estonia	0	0	0.00%	Estonia	***	0	0.00%		
	Hungary	***	0	0.00%	Hungary	***	0	0.00%		
	Latvia	759,000	0	0.26%	Latvia	499,000	0	0.18%		
	Lithuania	644,000	0	0.22%	Lithuania	0	0	0.00%		
	Macedonia	0	0	0.00%	Macedonia	***	0	0.00%		
	Poland	573,358	0	0.19%	Poland	425,000	0	0.16%		
	Russia	3,606,050	39,884	1.23%	Russia	4,149,550	0	1.53%		
	Others	292,000	0	0.10%	Others	257,000	0	0.09%		
Total	9,415,833	40,071		Total	6,837,254	0				
Middle East	Afghanistan	0	***	0.00%	Afghanistan	0	0	0.00%		
	Armenia	***	0	0.00%	Armenia	0	0	0.00%		
	Bahrain	***	0	0.00%	Bahrain	167,525	1,750	0.06%		
	Cyprus	434,044	17,633	0.15%	Cyprus	0	0	0.00%		
	Israel	2,318,390	363,092	0.91%	Israel	2,160,450	401,920	0.94%		
	Jordan	1,164,025	322,376	0.50%	Jordan	1,317,725	167,706	0.55%		
	Kuwait	368,494	10,319	0.13%	Kuwait	574,825	1,800	0.21%		
	Lebanon	997,375	35,733	0.35%	Lebanon	901,300	8,750	0.33%		
	Qatar	***	0	0.00%	Qatar	146,500	0	0.05%		
	Saudi Arabia	3,061,150	159,204	1.09%	Saudi Arabia	3,898,650	94,669	1.47%		
	Turkey	408,050	46,979	0.15%	Turkey	250,700	680,877	0.34%		
	United Arab Emirates	10,585,450	1,387,781	4.05%	United Arab Emirates	8,499,350	447,065	3.29%		
	Others	189,900	50,234	0.08%	Others	0	16,200	0.01%		
Total	19,526,878	2,393,351		Total	17,917,025	1,820,737				
Asia	Bangladesh	***	0	0.00%	Bangladesh	***	0	0.00%		
	China	7,573,543	7,422,619	5.07%	China	6,366,077	5,150,594	4.24%		
	Fiji	***	0	0.00%	Fiji	***	0	0.00%		
	Guam	***	0	0.00%	Guam	***	0	0.00%		
	India	1,341,387	25,679,705	9.13%	India	354,100	27,989,404	10.43%		
	Indonesia	222,200	0	0.08%	Indonesia	147,575	0	0.05%		
	Japan	22,505,505	49,810	7.62%	Japan	18,118,383	350	6.67%		
	Malaysia	1,530,150	0	0.52%	Malaysia	1,026,350	0	0.38%		
	Nepal	0	0	0.00%	Nepal	182,500	0	0.07%		
	Pakistan	0	***	0.00%	Pakistan	0	0	0.00%		
	Philippines	12,150	0	0.00%	Philippines	171,275	0	0.06%		
	Singapore	989,550	0	0.33%	Singapore	892,400	0	0.33%		
	South Korea	5,128,200	0	1.73%	South Korea	4,048,175	0	1.49%		
	Taiwan	1,442,361	131,099	0.53%	Taiwan	1,790,285	1,043,651	1.04%		
	Thailand	362,500	0	0.12%	Thailand	323,750	0	0.12%		
	Vietnam	0	0	0.00%	Vietnam	***	0	0.00%		
Others	83,492	40,868	0.04%	Others	83,866	0	0.03%			
Total	41,191,038	33,324,101		Total	33,504,736	34,183,999				
New Zealand	New Zealand	Total	659,225	0	0.22%	New Zealand	Total	461,600	0	0.17%
	Australia	Total	2,536,681	0	0.86%	Australia	Total	492,750	0	0.18%
Africa	Algeria	494,700	0	0.17%	Algeria	0	0	0.00%		
	Canary Islands	***	0	0.00%	Canary Islands	190,925	0	0.07%		
	Egypt	1,477,250	0	0.50%	Egypt	1,292,250	62,020	0.50%		
	Kenya	***	0	0.00%	Kenya	***	0	0.00%		
	Mauritius	***	0	0.00%	Mauritius	0	0	0.00%		
	South Africa	909,335	350	0.31%	South Africa	553,983	0	0.20%		
	Swaziland	0	0	0.00%	Swaziland	***	0	0.00%		
	Tunisia	0	0	0.00%	Tunisia	299,000	0	0.11%		
	Others	153,500	0	0.05%	Others	51,350	0	0.02%		
	Total	3,034,785	350		Total	2,387,508	62,020			
<b>TOTAL DELIVERIES</b>		<b>258,611,346</b>	<b>37,327,491</b>	<b>100.00%</b>	<b>TOTAL DELIVERIES</b>		<b>234,636,253</b>	<b>37,119,701</b>	<b>100.00%</b>	

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

**ALMOND BOARD OF CALIFORNIA**  
**Quality Control Report**  
**Industry Summary**  
**August 1, 2002 - November 30, 2002**

Variety Name	From ABC Form 1	From USDA Inspection Certificates		% Total Receipt	% Rejects
	Total Receipts	Total Receipts	Total Inedibles		
Aldrich	13,300,156	13,204,079	71,803	1.40%	0.54%
Avalon	135,588	129,579	2,071	0.01%	1.60%
Ballico	8,567	8,567	68	0.00%	0.79%
Butte	104,721,015	99,914,023	457,779	11.00%	0.46%
California	15,758,054	15,297,106	114,125	1.65%	0.75%
Carmel	150,739,097	143,295,164	839,339	15.83%	0.59%
Carrion	157,948	297,038	2,096	0.02%	0.71%
Chips Special	41,717	41,717	526	0.00%	1.26%
Cruz	4,210	4,210	14	0.00%	0.33%
Davey	8,876	8,876	54	0.00%	0.61%
Dotty One	65,962	65,962	832	0.01%	1.26%
Drake	64,834	67,471	1,109	0.01%	1.64%
Fritz	34,851,349	34,630,196	242,169	3.66%	0.70%
Harvey	771,346	785,325	15,594	0.08%	1.99%
Hashem	524,570	758,753	10,886	0.06%	1.43%
Jeffries	84,827	84,588	129	0.01%	0.15%
Jordanolo	0	0	0	0.00%	0.00%
Le Grand	715,842	756,824	18,288	0.08%	2.42%
Livingston	4,007,957	3,891,048	40,819	0.42%	1.05%
Marchini	97,800	115,613	1,401	0.01%	1.21%
Merced	913,275	914,548	22,465	0.10%	2.46%
Milo	14,583	14,583	122	0.00%	0.84%
Mission	26,170,796	24,251,737	90,538	2.75%	0.37%
Mixed & Unknown	28,414,072	29,472,621	268,688	2.98%	0.91%
Mono	1,074,774	1,061,654	33,985	0.11%	3.20%
Monterey	50,867,611	48,256,639	394,981	5.34%	0.82%
Morley	195,236	195,236	1,223	0.02%	0.63%
Neplus	4,900,166	4,788,422	63,258	0.51%	1.32%
Nonpareil	393,617,343	384,127,823	3,627,050	41.33%	0.94%
Norman	196,979	197,014	1,927	0.02%	0.98%
Padre	36,474,250	34,404,777	101,927	3.83%	0.30%
Peerless	8,866,871	8,526,037	28,485	0.93%	0.33%
Price	33,900,953	32,864,088	181,223	3.56%	0.55%
Ripon	1,124	1,124	20	0.00%	1.78%
Romain	6,388	6,388	13	0.00%	0.20%
Rosetta	22,253	22,253	1,591	0.00%	7.15%
Royal Kern	2,735	2,735	66	0.00%	2.41%
Ruby	5,248,557	5,055,900	29,571	0.55%	0.58%
Sauret	567,873	478,499	10,426	0.06%	2.18%
Savana	117,738	117,738	423	0.01%	0.36%
Seedling	7,498	7,498	64	0.00%	0.85%
Sonora	22,295,834	22,315,108	195,328	2.34%	0.88%
Texas	1,829	1,829	12	0.00%	0.66%
Thompson	2,468,473	2,481,220	43,940	0.26%	1.77%
Tioga	9,908	9,908	113	0.00%	1.14%
Tokyo	626,439	626,439	10,128	0.07%	1.62%
Valencia	29,259	14,810	51	0.00%	0.34%
Wood Colony	9,337,095	9,112,657	46,733	0.98%	0.51%
Yosemite	4,783	4,783	49	0.00%	1.02%
<b>TOTALS:</b>	<b>952,414,410</b>	<b>922,690,207</b>	<b>6,973,502</b>	<b>100.00%</b>	<b>0.76%</b>

This report is subject to further reconciliation of USDA incoming certificates.

December 11, 2002