

THE AMERICAN EXPORTER

Fall 2025 | \$5 U.S.D.

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**NON-GMO'S
PROMINENCE IN BIOTECH**

**US BEEF CONTINUES TO HAVE
STRONG GLOBAL DEMAND!**

CALIFORNIA ALMOND CROP UPDATE

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A Quarterly Food Magazine
Volume 19, Issue 4



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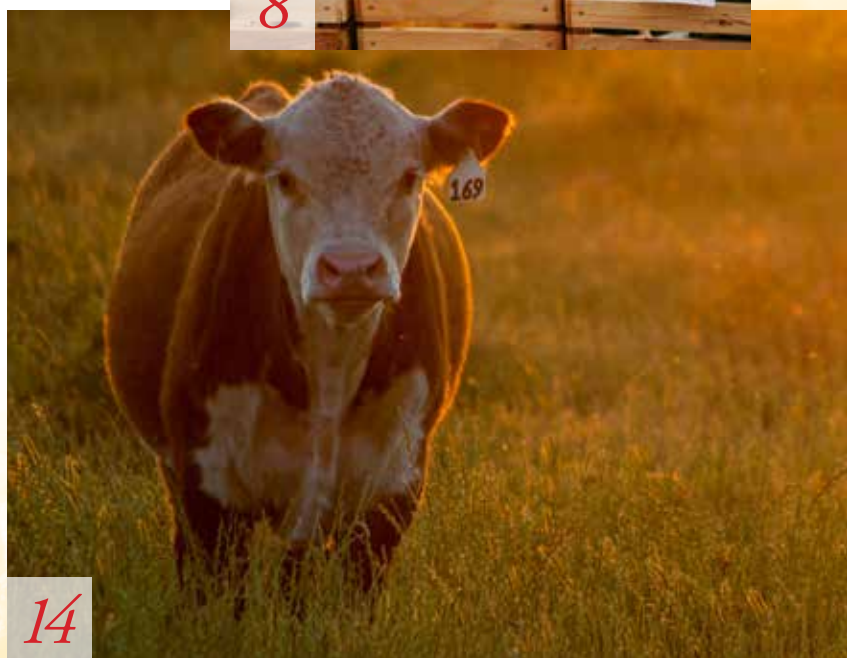
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from the publisher

Middle East Continues to be a Solid Market

Back in 2019, I discussed the observations of healthy food trends in the Middle East has not changed. The expansion and acceptance of “healthy food” products have taken on a new popularity across Europe and Asia. In mainland China for example, the natural food and beverage establishments are everywhere. As I have stated last year, countries that once couldn’t afford healthy food products (which we have enjoyed here in the United States for years) can afford it today. But as we know in America, just because you have healthy food products everywhere does not mean you’re not going to make the right choices. It still comes down to one’s discretion.

As 2026 approaches, is this trend catching on in the Middle East? Let’s examine this...the growth in the consumption of fast food and packaged food is a demographic shift situation. Young Middle Eastern adults are getting married later and living with their parents well into their late twenties and even early thirties. And women a generation ago got married before twenty are today delaying having kids and choosing careers. That means the Middle Eastern Millennials have more disposable income to go to restaurants or consume convenient food for expediency. Sound familiar? The cultural phenomenon I’m referring to has been going on here in the United States for years. And you are seeing the acceleration of this demographic shift more and more in China and other Asian countries.

So, it shouldn’t surprise anyone that the United States has captured a 50 billion plus export market of prepared and processed food products in the region. Middle Easterners are prospering in regions like the United Arab Emirates and with that comes fast paced lives. The demand for U.S. processed food products has a growing appeal and demand. However, as one finds out with fast foods and processed foods comes calories and carbohydrates! Obesity and diabetes are on the rise in the region. It wasn’t hard to find plenty of stories regarding Middle Eastern diets and the rise of these ailments due to the consumption of processed foods and sugary beverages.

Since 2019, we’ve seen a dramatic increase of U.S. natural and organic food products being exported into the U.A.E., Saudi Arabia, and Turkey along with a handful of other Middle Eastern countries. The demand for processed and prepared foods isn’t declining anytime soon. The demographic shift situation is not exclusive to North America and Europe. It’s happening in the Middle East and Asia. What is fascinating to me is that the Middle East is facing the same food consumption problems that Asia and Europe are now experiencing. And like the United States...what soon follows in each region is the popularity of healthy foods. I like fast food as much as the next person. But I realized long ago that these foods should be enjoyed on a limited basis. Eating healthy takes dedication, discipline, and proper choice. It’s a learning curve everyone experiences...no matter where you live. And with that, I’ll see you in Dubai.

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In a world where advancements in biotechnology have revolutionized agriculture, the term “Non-GMO” has gained prominence as a key aspect of consumer awareness and food choices. Non-GMO, which stands for non-genetically modified organisms, refers to foods and products that have not been genetically engineered or altered in a laboratory setting. This distinction has sparked debates, fueled consumer preferences, and led to the implementation of various labeling and certification programs. Before we can understand the importance of non-GMO to the consumer, we must first look at the history behind genetically modified organisms (GMOs).

Understanding GMOs

According to The Non-GMO Project, “a GMO, or genetically modified organism, is a plant, animal, microorganism or other organism whose genetic makeup has been modified in a laboratory using genetic engineering or transgenic technology. This creates combinations of plant, animal, bacterial, and virus genes that do not occur in nature or through traditional crossbreeding methods.” Created by manipulating an organism’s genetic material, the goal of genetically engineered products is often to enhance desirable traits such as resistance to pests, tolerance to herbicides, or improved nutritional content.

Introduced in 1994 for mass markets, the FLAVR SAVR tomato was the first genetically engineered produce to be commercialized. The FLAVR SAVR resembled traditional tomatoes in nearly every way except it degraded more slowly. While the FLAVR SAVR tomato was popular, it was never profitable due to high production costs. It was, however, the start of a new arena of bio-enhanced food products. While only a few types of GMO crops are grown in the U.S. today, GMOs make up a large percentage of the overall crop. For example, according to the FDA, 99.9 percent of sugar beet grown in the U.S. is GMO. Similarly, 92 percent of corn planted in the U.S. is GMO.

Non-GMO Movement

With the rise of GMOs also came the rise of health and environmental concerns. One of the primary concerns surrounding GMOs is their potential impact on human health. Critics argue that introducing foreign genes into crops could lead to unintended consequences, such as the

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creation of allergens or the development of resistance in pests and weeds, necessitating increased pesticide use. Proponents of GMOs, on the other hand, contend that extensive scientific studies have demonstrated the safety of these products for human consumption and argue that GMOs may be one answer to global food shortages.

The Non-GMO movement also reflects environmental concerns. Opponents worry about the potential for GMOs to crossbreed with wild or non-GMO crops,

creating hybrid strains that could have unpredictable ecological consequences. Additionally, the use of certain genetically modified crops that are engineered to resist specific herbicides has led to concerns about the development of herbicide-resistant weeds.

Consumers who choose non-GMO products often do so based on a desire for transparency and the belief that traditional breeding methods are a safer and more natural approach to agriculture. This demand for transparency has led to

the development of various third-party verification programs and certifications, such as the Non-GMO Project, which rigorously tests and evaluates products to ensure they meet Non-GMO standards. Products that are verified Non-GMO by the Non-GMO Project Standard often feature a the Non-GMO Project Standard trademark orange and white butterfly on their packaging.

The Non-GMO movement has also influenced legislation and regulatory frameworks in different regions. Some countries have implemented labeling requirements to inform consumers about the presence of GMOs in their food, allowing individuals to make informed choices based on their preferences.

In 2016, the US Department of Agriculture (USDA) established a new national mandatory standard for labeling foods that may be bioengineered or have bioengineered ingredients, a slightly more narrow definition than GMO. After a long implementation process, which was rolled out in January 2022, all companies who package and label foods for retail sale must disclose presence of bioengineered ingredients in their food product according to the USDA's National Bioengineered Food Disclosure Standard (NBFDS). But wait, is bioengineered the same as GMO? The NBFDS defines bioengineered foods as "those that contain detectable genetic material that has been modified through certain lab techniques and cannot be created through conventional breeding or found in nature." The term "bioengineered" is more specific than GMO.

While it may sound confusing the difference, it's important to note that while not all foods are bioengineered, all bioengineered foods are genetically modified. In addition, the Agricultural Marketing Service (AMS) developed the List of Bioengineered Foods to identify the crops or foods that are available in a bioengineered form throughout the world.

The list is updated yearly and currently includes:

- Alfalfa
- Apple (Arctic TM varieties)
- Canola

Continued on page 30

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Founded in 2006 and headquartered in sunny Florida, USA, Bouras Global Trading is a trusted leader in the global food export industry. We specialize in delivering a wide range of high-quality products for retail and food service, including condiments, dressings, vinegars, oils, and mayonnaise. From American classics like yellow

mustard and heavy mayonnaise to modern favorites like sriracha and soy sauce offering a range of products to please every palate.

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Bouras Global Trading offers convenient food service packaging ready for restaurants, hotels, and catering. With the high standard of quality your customers deserve and expect, our range of vinegars, oils, condiments, sauces, syrups, and pie fillings are ready to go to work!

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Dressings

Discover Bouras Global Trading's range of classic American salad dressings, including zesty Italian, creamy Ranch, tangy French, and rich Thousand Island, all available in healthy, fat-free options for the modern, health-conscious consumer. These timeless favorites are ideal for drizzling on salads, dipping veggies, or adding a flavorful twist to your favorite dishes.

Pie Fillings

Bouras Global Trading's range of pie fillings brings harvest-fresh flavors directly to your customers. Choose from warm apple, classic cherry, summery strawberry, or bright blueberry to dress up your pies, pastries, filled doughnuts, melbas and more!

Sauces

From bold BBQ and fiery hot sauces and wing sauces to savory soy and worcestershire and tangy teriyaki, Bouras Global Trading's selection of popular American sauces adds flavor to any dish. Versatile and delicious, these sauces are perfect for grilling, marinating, dipping, and drizzling.

Vinegars and Oils

Great dishes start with simple, high-quality ingredients. Bouras Global Trading's apple cider vinegar, white vinegar, and clear liquid frying oil are perfect building blocks for creating perfect pickles, scrumptious salads, and fried delights.

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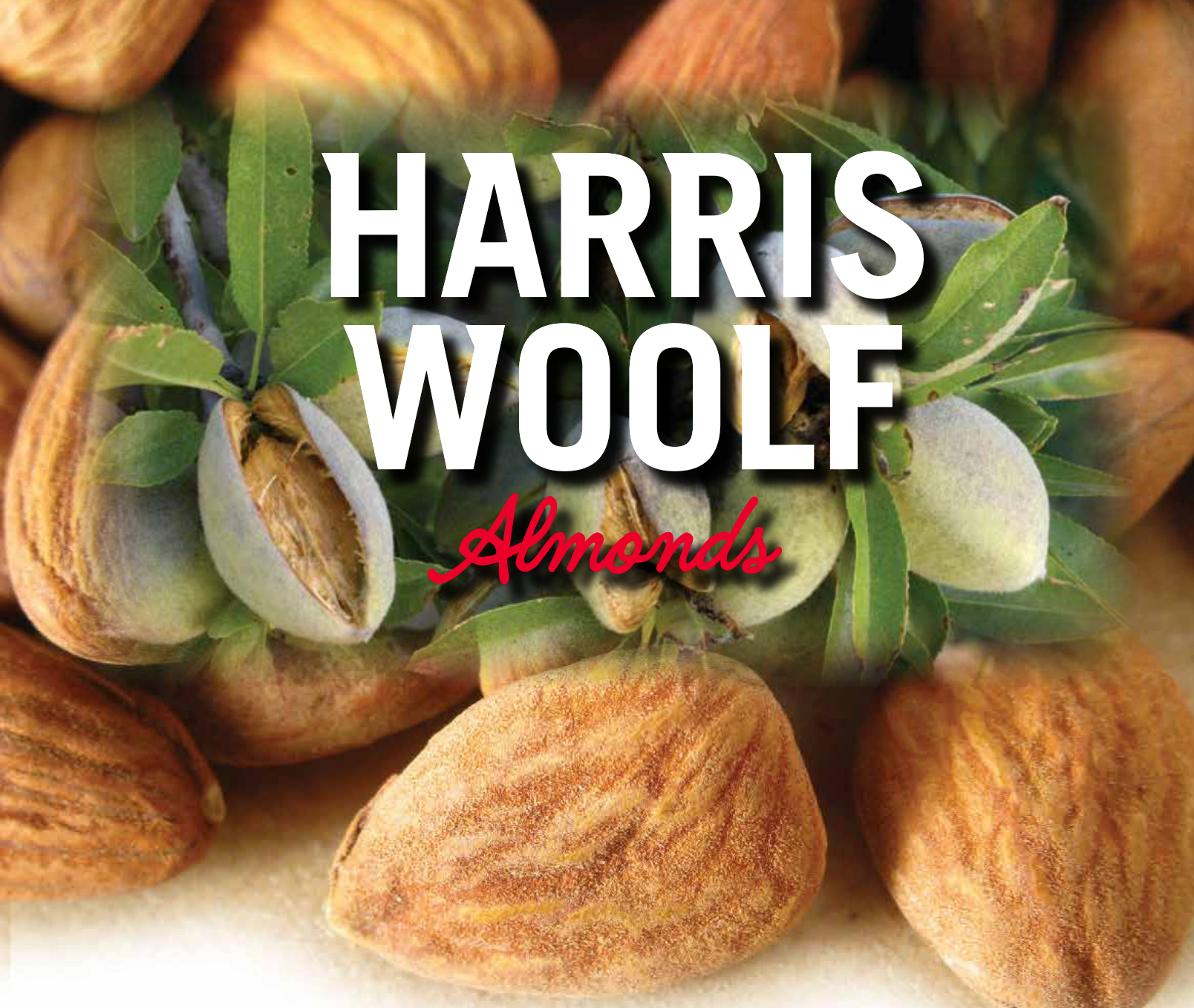
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The best almonds formulate the best products. We work with approximately 200 unique farms and farmers to harvest high-quality, sustainable almonds. Pollinator preservation, soil health, water conservation, and food safety are at the forefront of our minds and our growers' minds. We encourage our growers to achieve certifications like Bee Friendly Farming or Bee Better Certified or participate in programs like the California Almond Stewardship Platform or EcoPractices.

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Despite Headwinds, Global Demand for U.S. Beef Proves Resilient

by Lisa Mooney

While exports of U.S. beef have trended lower in 2025, the results are more reflective of market access barriers and supply-related challenges, rather than demand. Global demand, even in the face of record cattle and beef prices, remains robust. Exports have increased strongly to leading market South Korea, and to Central and South America, while also achieving gains in emerging destinations such as the Philippines and Africa. Shipments to Japan and Mexico have also held up relatively well this year this year. Even in Canada, where “Buy Canadian” sentiment has been a growing theme for consumers, demand for U.S. beef remains strong in the foodservice sector.

The year-over-year deficit is mostly related to a lockout in China, where regulators have failed to renew registrations for U.S. beef plants and cold storage facilities. This impasse interrupted what was shaping up to be a solid year for U.S. beef in China, as exports in the first quarter trended higher, reaching almost \$400 million in value. But with nearly all U.S. plants no longer eligible, exports to China ground to a halt by mid-summer.

One of the reasons demand for U.S. beef has been so resilient is that U.S. cattle producers have responded to consumers’ desire – both overseas and in the domestic U.S. market – for exceptional quality. As noted in the chart on page 16, nearly 85% of U.S. cattle going to market in 2025 have graded Choice or higher, including a record 11% grading Prime.



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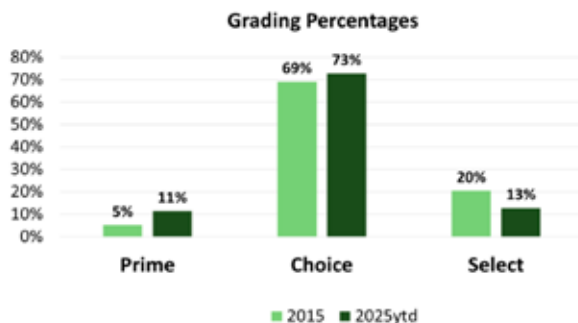
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Over the past 10 years, the share of fed beef production grading Prime has more than doubled to 11%. The share grading Choice also continues to increase.



Source: USDA/AMS, percentages are for share of total fed beef production, year-to-date through September 6, 2025.



These are truly remarkable figures that reflect U.S. producers' commitment to superior genetics and state-of-the-art cattle raising, handling and feeding practices. These investments allow U.S. beef to deliver a superior dining experience, driven the rich flavor made possible through outstanding production methods, including the corn-finishing phase. So while low U.S. cattle numbers are definitely a concern, let's focus on the more positive side of this story: Record prices aren't being paid for U.S. cattle and beef just because they are in short supply. They are also the finest in the world – and consumers across globe are voting with their wallets.

A great example of this is how beef demand has evolved in our Western Hemisphere markets. As recently as 10 years ago, many buyers in Mexico and Central America were only interested in Select or ungraded beef from the U.S., and even then they would hold out for attractive prices. Today's purchasing patterns are entirely different, driven by powerful demand for Choice cuts – with many buyers seeking upper 2/3 Choice and Prime. And while some of this demand comes from the region's thriving tourism and hospitality sectors, that's only part of the story. Retail demand is also booming,

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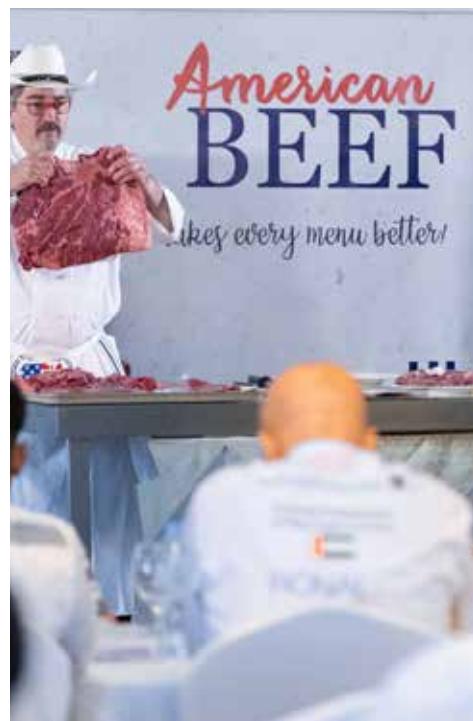
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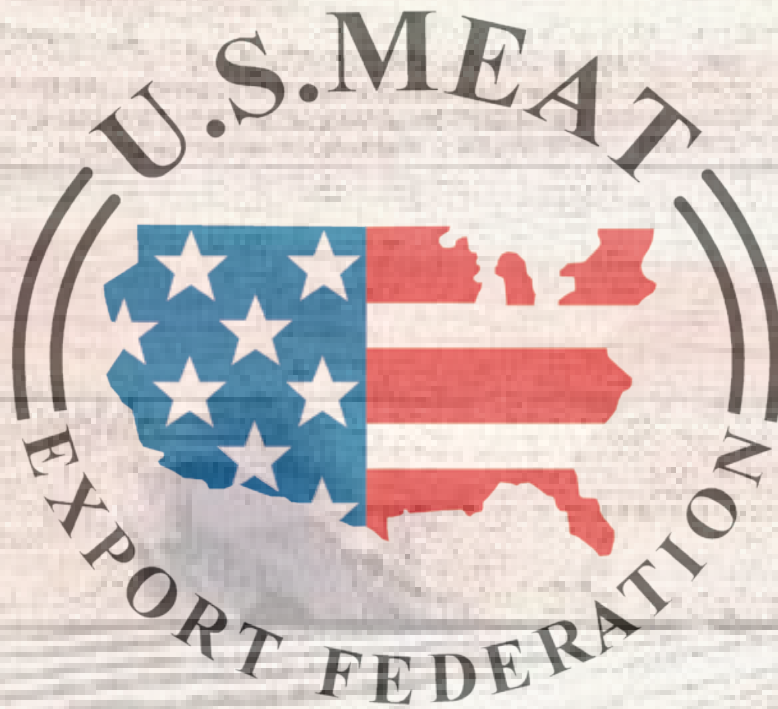
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Continued from page 16

with modern supermarkets and high-end meat shops carrying an expanding variety of U.S. beef cuts. Visit these locations on a typical day, and you will see dozens of shoppers seeking at-home dinner options once reserved for higher-end restaurants.

Despite our supply-side challenges, the U.S. beef industry is poised to replicate this success in other global markets. But it is no coincidence that U.S. beef's booming popularity in Latin America is happening in free trade agreement partner markets such as Mexico, Central

America, the Dominican Republic and Chile. So, market access improvements are definitely needed in order for more global consumers to enjoy U.S. beef.

There has been recent progress on market access, including the United Kingdom restoring some duty-free access for U.S. beef. The United Arab Emirates and Indonesia also lifted halal-related obstacles, and U.S. beef recently gained long-overdue access to the Australian market. But trade barriers inhibiting exports of U.S. beef are not just confined to China. U.S. exporters also face significant obstacles in regions such



as Europe, Southeast Asia and Africa. Even in Korea – the leading destination for U.S. beef and a valued free trade agreement partner – limiting imports to beef from cattle less than 30 months of age depresses U.S. exports by about \$140 million annually.

Market access barriers for U.S. beef are being discussed in ongoing negotiations with a number of trading partners. USMEF appreciates the tireless efforts of the U.S. Department of Agriculture and the Office of the U.S. Trade Representative to keep these issues front-and-center during this pivotal time for agricultural trade. We are also grateful for the strong commitment Congress has shown toward international market development. When combined with outstanding support from our industry partners, USDA promotion and development funding allows USMEF to explore and develop emerging markets for U.S. beef, as well as defend our hard-earned market share in established destinations.



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California Almonds

Building Global Demand

by
Lisa Mooney

Today, the state of California is the biggest producer of almonds, growing approximately 80 percent of the world's supply. Almonds are California's top agricultural export and largest tree nut

crop in total dollar value and acreage. They also rank as the largest U.S. specialty crop export.

The Almond Board of California (ABC) works to build demand around the globe

for California Almonds. With a team that conducts market analysis globally, they identify and prioritize markets around the world that will provide the largest return to the almond community.

The 2025 California Almond Objective Measurement Report published in July by the U.S. Department of Agriculture's National Agricultural Statistics Service (USDA-NASS) estimates that the crop harvested in 2025 will come in at 3.0 billion meat pounds.

The Objective Estimate is up 7 percent from USDA-NASS's Subjective in May and 10 percent higher than last year's crop of 2.73 billion meat pounds. The 2024 harvest yields were 2.5% below the 2024 Objective Report estimate, reflecting the difficulty of precisely forecasting crop size given the current fluctuations in weather and economic factors.

"The Almond Board is actively driving initiatives to stimulate demand around the world," said Clarice Turner, president and CEO of the Almond Board of California. "While this year's Objective Measurement estimate is higher than the industry expected, shipments remain strong. We are focused on innovation—expanding almond applications, reaching consumers through new channels, and opening markets around the world."

The report shared that the 2025 almond crop experienced variable weather during bloom, which began in early February and peaked in the middle of the month. Storms brought rain, wind and hail, which hindered bee hours and blossom growth. Conditions improved in early March with warm temperatures accelerating the crop's progress through

Continued on page 28

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Continued from page 24

bloom. Mild temperatures and timely rain in spring supported nut growth and continued through early summer, lessening heat stress in orchards.

“This larger crop estimate is what the industry expected after a solid water winter and generally good weather during bloom, but it’s also a testament to the hard work done by almond farmers throughout California,” said Clarice Turner, president and CEO of the Almond Board of California. “Demand for California

almonds around the globe continues to grow and our almond farmers constantly deliver, producing high quality California almonds to meet that demand.”

Unlocking North Africa

As global demand for healthy, protein-packed snacks continues to rise, California almonds are positioning themselves as a top choice in international markets.

One region holding promising potential for almond exports is North Africa. Countries including Morocco, Tunisia,

Algeria, and Egypt already have a strong tradition of nut consumption, especially almonds. When combined with increasing incomes, the shift in consumer habits aligns well with the benefits that almonds provide.

“It’s a new area, but it really does show incredible potential,” said Julie Adams, vice president, global and technical affairs at the Almond Board of California (ABC). “We can’t afford not to pay attention to this region, and we need to look at the opportunities.”

Another reason to focus efforts on this area of the globe is due to the projection that their population is expected to double from 2025-2050 according to data from the United Nations released by Rose Research.

Rose said that similar to India 15-20 years ago, this growing population is expected to be a younger demographic with an interest in health and nutrition. Additionally, North Africa’s vast urbanization, high fertility rates and strengthened purchasing power point in a positive direction for California almonds.

This market has a strong interest in American products. Seventy-five percent of African consumers voiced their acceptance of buying a product labeled from the U.S., and 88% even said they’d pay a premium for them.

“Quality and safety aren’t the only things we’re going to hang our hats on,” Rose said. “We’ve got a lot of health messaging that we’re going to take advantage of as well, just like we’re doing in all of our other markets.”

Perhaps the most familiar to California almonds is Morocco. In fact, the country now stands as the industry’s tenth largest export market, and new infrastructure is being built, which will support these growing shipments. It’s common for almonds to be incorporated into at least one meal per day for Moroccans, and experts also believe the country can serve as the gateway to Africa.

Another unique factor to Morocco is its free trade agreement with the U.S. In fact, a zero-percent duty provides an exceptional opportunity and advantage over other origin suppliers.

Continued on page 38

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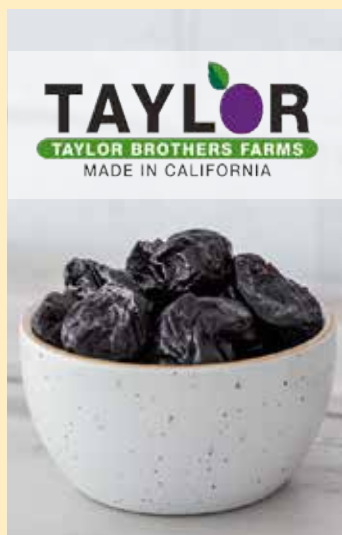
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As the debate over GMOs continues, it is clear that the non-GMO movement has had a significant impact on the food industry

and consumer behavior. The demand for non-GMO products has led to variety in the marketplace, providing consumers with more choices as well as labeling systems aligned with their values.

Non-GMO Labeling - International Appeal

The popularity of non-GMO products extends beyond the borders of the United States. The movement against genetically modified organisms (GMOs) and the demand for non-GMO products are global phenomena, with consumers in

various countries expressing concerns and preferences similar to those in the United States. Among the countries growing genetically modified crops, the USA, Brazil, Argentina, India, and Canada are the largest growers; however, there has been a strong push for GMO labeling and restrictions on the cultivation of genetically modified crops.

For example, many European countries have implemented regulations requiring clear labeling of products containing GMOs, allowing consumers to make informed choices. All of the countries in the European Union require genetically modified foods to be labeled, according to the Non-GMO Project.

In Asia, the non-GMO movement has gained traction as well. In countries like Japan and South Korea, there is a growing awareness and concern about the potential risks associated with GMOs. Consumer demand for non-GMO food products has led to labeling initiatives in these markets.

India, a significant player in global agriculture, has seen debates around the cultivation of genetically modified crops as well. In South America, where genetically modified crops like soybeans and corn are major agricultural commodities, there are both proponents and critics of GMOs. Brazil, for instance, is a major producer of genetically modified soybeans, but concerns about environmental and health impacts have led to discussions and regulations.

It's essential to note that the acceptance and popularity of non-GMO products can vary from country to country and are influenced by factors such as cultural attitudes, regulatory frameworks, and the prevalence of genetically modified crops in local agriculture. In some regions, the debate over GMOs is highly polarized. The non-GMO movement reflects a complex interplay of scientific, environmental, and ethical considerations. Whether driven by concerns about human health, environmental impact, or a preference for traditional agricultural practices, consumers are increasingly seeking out non-GMO options. As technology continues to advance, the discourse surrounding GMOs and non-GMOs will likely persist, shaping the future of agriculture and influencing the choices we make about the food we consume.



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Food & Hospitality Vietnam

Ho Chi Minh – March 24 - 26, 2026

Food Hotel Asia

Singapore – April 21 - 24, 2026

Saudi Manufacturing (Ingredients)

Riyadh – June 8 - 10, 2026

Seoul Food & Hotel

Korea – June 9 - 12, 2026

Africa Food Show

Cape Town, South Africa – June 10 - 12, 2026

Saudi Food Show

Riyadh – June 15 - 17, 2026

Food & Hospitality Indonesia

Jakarta – July 21 - 24, 2026

Food & Hospitality Thailand

Bangkok – August 19 - 22, 2026

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Mexico City – August 20 - 23, 2026

RBHK

Hong Kong – September 1 - 3, 2026

Gulfood Manufacturing (Ingredients)

Dubai – November 3 - 5, 2026

Food & Hospitality China

Shanghai – November 10 - 12, 2026

Food & Hospitality Malaysia

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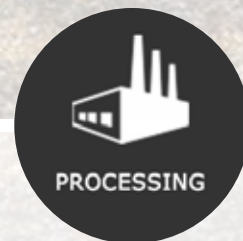
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In Egypt, nut consumption has grown by over 50% in the last three years, and similar growth is happening in neighboring countries. Egypt is particularly exciting because it's

also the population epicenter for this region, and it's highly urbanized, meaning that its consumers are looking for safe, high quality food to be imported.

Unique to Algeria is their willingness to splurge on high quality food products. They have one of the region's highest per-capita expenditures on food, a robust confectionary industry and are supported by strong distribution channels.

Compared to the other markets, Tunisia's economy took longer to recover from the effects of COVID, but studies show it still presents a valuable opportunity for almonds because tourism is on the rise and consumers spend a good portion of their income on food.

Sources: California Almond Board
Rose Research



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Product Line: Our product offerings include Pecans, Pecan Oil, and Pecan Meal-Flour in Certified Organic and non-Organic



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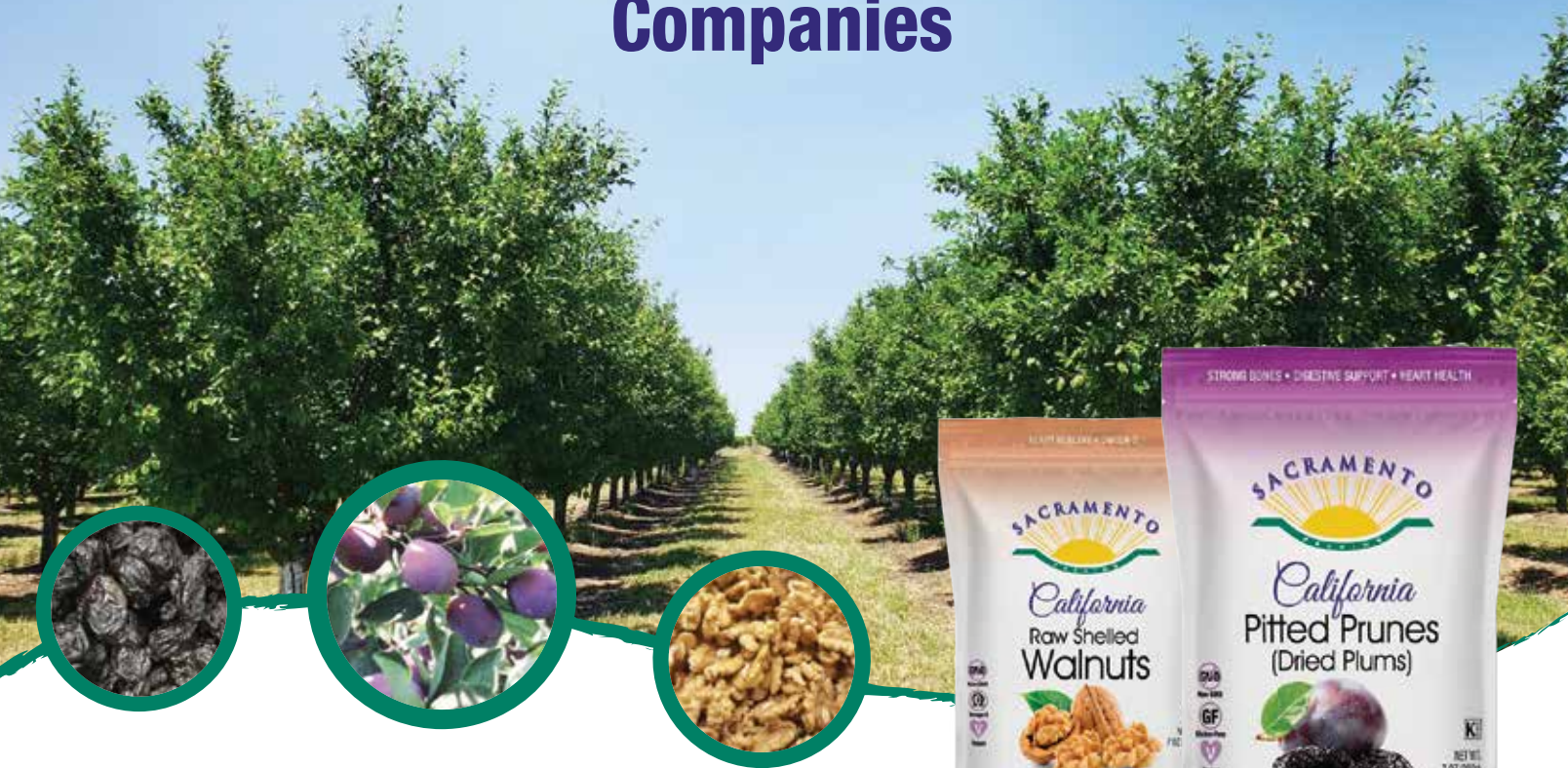
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