



INDIA: GROWING THROUGH THE PANDEMIC

Warren Cohen, *Blue Diamond Growers*

Sudarshan Mazumdar, *Almond Board of California*



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AGENDA:

- India Regulatory Environment... Each Day Something New
– Julie Adams, Vice President Global Technical, Regulatory & Government Affairs, ABC
- India Marketing Program: Evolving To Leverage New Opportunities – Sudarshan Mazumdar, Regional Director India/ South Korea/ Japan, ABC



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A white ceramic bowl filled with almonds, placed on a piece of burlap fabric. The background is a blurred wooden surface with scattered almonds.

**INDIA REGULATORY
ENVIRONMENT....
EACH DAY SOMETHING NEW!**

A WORK IN PROCESS...

- **NOC:** need to find resolution
 - B/L consigned to order of shipper is negotiable
 - BUT issue is IGM filing by shipping line
 - Engaging Customs; industry delegation?

- **GST:** awaiting feedback
 - Fresh vs dry
 - Lower rate for domestic production

- **COO:** new interpretation by FSSAI
 - USDA engaging FSSAI: Chambers of Commerce are official entities

Commodity	Commodity Description under GST	Tariff Heading	GST Rates
Almonds	Other nuts, fresh ¹ such as Almonds, whether or not shelled or peeled	0802	Nil
	Other nuts, dried , whether or not shelled or peeled, such as Almonds,	0802	12%
Cashew nuts ²	Cashew nuts, whether or not shelled or peeled	0801	5% ³
Hazelnuts or filberts (Corylus spp.)	Other nuts, fresh such as, Hazelnuts or filberts (Corylus spp.),, whether or not shelled or peeled	0802	Nil
	Other nuts, dried , whether or not shelled or peeled, such as, Hazelnuts or filberts (Corylus spp.),	0802	12%
Walnuts	Other nuts, fresh such as, walnuts, whether or not shelled or peeled	0802	Nil
	Other nuts, dried , whether or not shelled or peeled, such as, walnuts,	0802	5% ⁴
Pistachios	Other nuts, fresh such as, Pistachios, whether or not shelled or peeled	0802	Nil
	Other nuts, dried , whether or not shelled or peeled, such as, Pistachios,	0802	12%

FOOD SAFETY AND STANDARDS AUTHORITY OF INDIA

NOTIFICATION

New Delhi, the 9th July, 2020.

S. no.	Characteristics	Requirements
(i)	Moisture (m/m), per cent	Not more than 6.0
(ii)	Inshell almonds, shell or skin fragments, (m/m), per cent	Not more than 0.25
(iii)	Rancid, rotten and damaged by insects or other pests (m/m), per cent	Not more than 1.0
(iv)	Gummy and brown spot (m/m), per cent	Not more than 2.0
(v)	Blemishes and discoloration(m/m), per cent	Not more than 4.0
(vi)	Shrunken or shrivelled and not sufficiently developed kernels(m/m), per cent	Not more than 4.0
(vii)	Split, broken and halves (m/m), per cent	Not more than 5.0
(viii)	Chipped and scratched (m/m), per cent	Not more than 10.0
(ix)	Doubles or twins (m/m), per cent	Not more than 10.0
(x)	Acid insoluble ash , per cent	Not more than 0.1
(xi)	Oil content (m/m), per cent	Not less than 45.0
(xii)	Acidity of extracted oil, expressed as oleic acid , per cent	Not more than 1.25

KERNEL STANDARDS: MORE THAN ALMONDS

- **Standards:** only kernels.....for now
 - FSSAI targeting product on the market; not applied to inshell at import
 - Despite comments, kept C/S, doubles, oil
 - Goes into effect July 2021

- **Other Standards Less Burdensome**
 - Standards for cashews, peanuts, pistachios have fewer parameters
 - Walnut kernel also recently notified
 - More *local industry* engagement needed

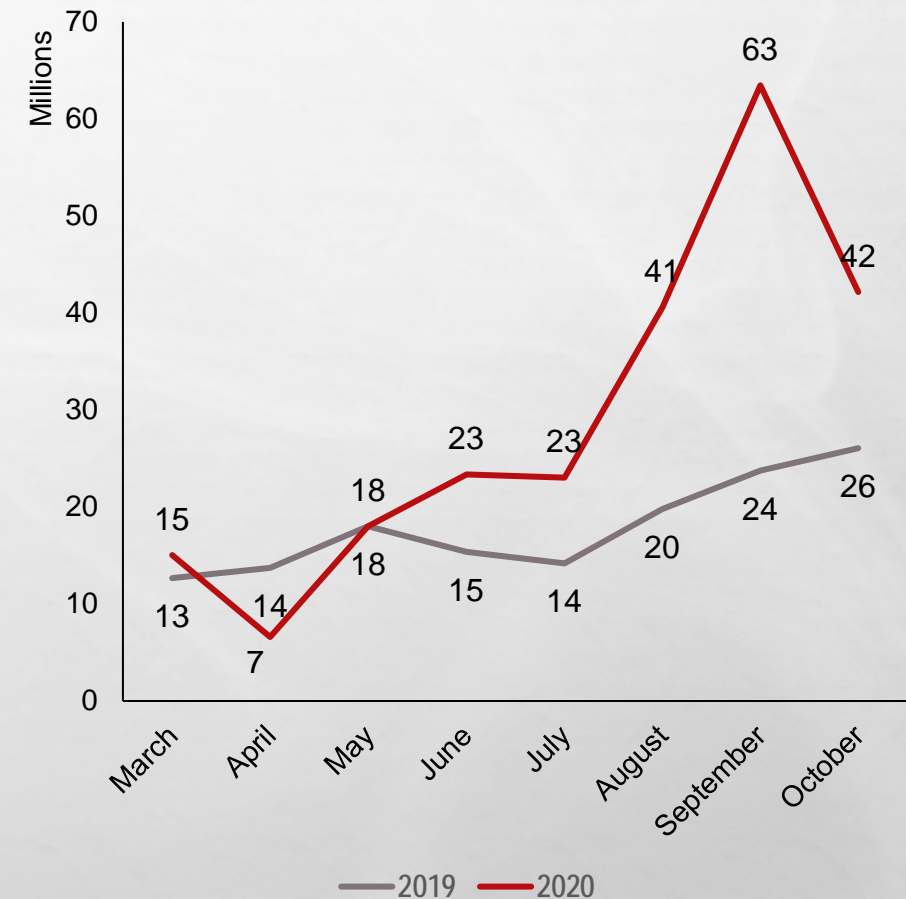


INDIA MARKETING PROGRAM: EVOLVING TO LEVERAGE NEW OPPORTUNITIES

COVID-19, A PROBLEM FOR INDIA.. AN OPPORTUNITY FOR ALMONDS

- India has second highest COVID-19 cases in the world, with 8.7 million cases*.
- India had the most stringent lockdown which impacted the economy.
 - In Q1 FY21, GDP shrank by -23.9%.
 - IMF predicted GDP will shrink by 10.3% in FY 21,
 - However, by next year, strong recovery expected with 8.8% growth (IMF).
- Consumers increasingly shifting to online spending to avoid disease exposure. E-commerce payments to record steep increase of 26% in 2020.
- Consumers more health conscious and concerned about immunity. Preventive healthcare, immunity and personal hygiene has seen tremendous growth.
- Greater awareness of pre-existing conditions like CVD, diabetes, pulmonary diseases causing greater fatalities for those infected.
- Increased faith in traditional/ ayurvedic products.

India Shipments (Mn. Lbs.)
March – October



ALMOND CONSUMPTION IN INDIA IS DRIVEN BY TRADITION



Consumed raw, soaked & peeled first thing in the morning



Given by mothers to children



Good for brain & provide energy through the day



Gifted during festivals



Accompaniment with wedding invites



Integral part of prayer offerings

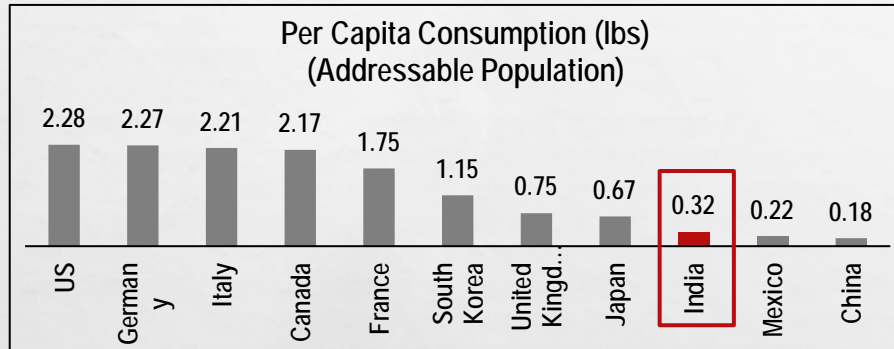


Usually eat 4-5 almonds per consumption occasion

BIG GROWTH OPPORTUNITY IN INDIA

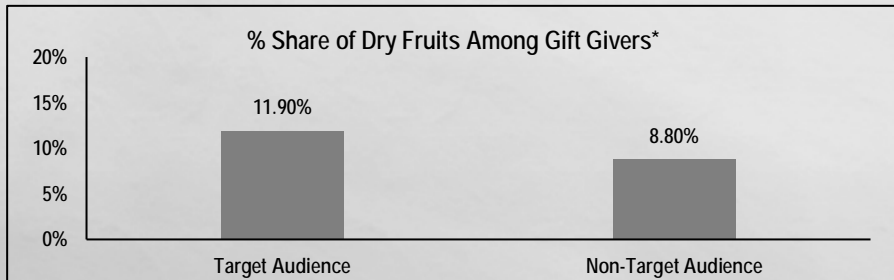
Low Per Capita Consumption

- India's per capita consumption (addressable population) at 0.32 lbs very low compared to most other regions.



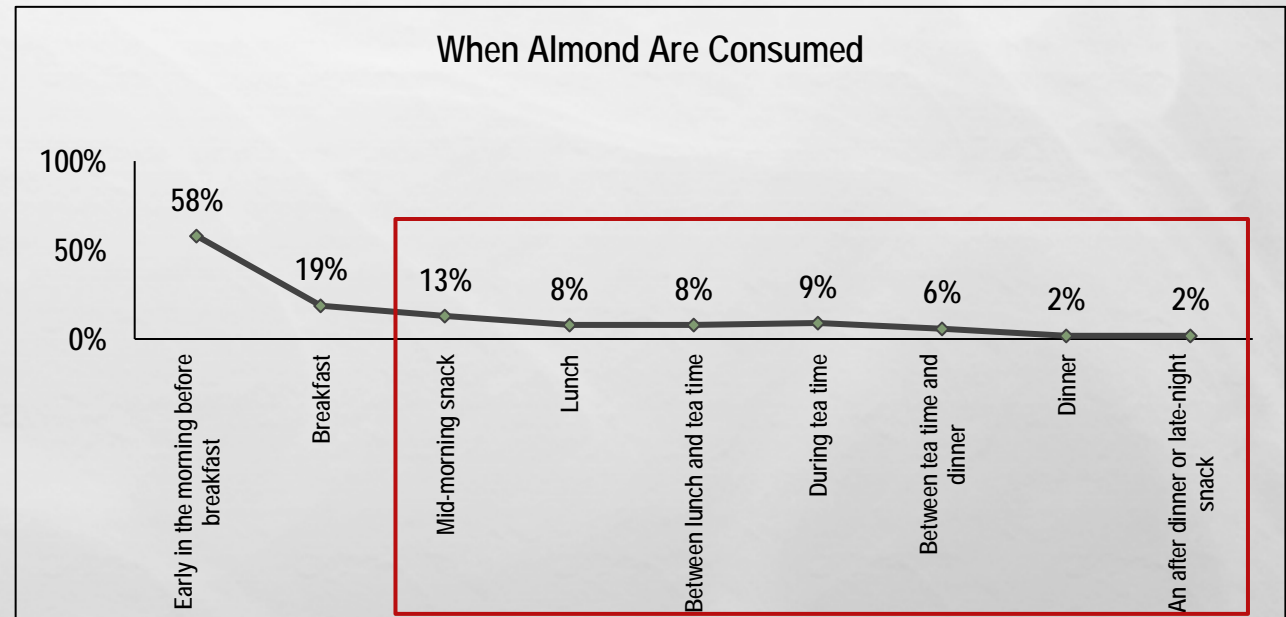
Strong Opportunity for Gifting

- Only 11.9% of people who gift during festivals, gift almonds.



Strong Opportunity for Morning Consumption and Snacking

- 40% of households with children are not currently engaged in the Morning Occasion.
 - Households participating in Morning occasion, average number of days is 2.8/ week.
- Significant opportunity to grow consumption beyond morning ritual as a healthy snack.
 - Incidence of consumption from mid morning to rest of the day is low varying from 2% to 13% by day part.



*During Festivals

ALMONDS STRONGLY POSITIONED TO MEET HEALTH AND WELLNESS GOALS FOR BOTH CHILDREN AND ADULTS

Top 12 Wellness Goals	Women	Men
To become physically fit	20%	19%
Set a good example for my children/family	19%	18%
Having good relationships with family and friends	19%	19%
To have more energy and stamina	18%	18%
Sickness or disease prevention	18%	18%
Avoid or manage diseases	18%	18%
Improving my digestive health	16%	15%
Keeping my mind stimulated	16%	15%
To have a sharp memory/concentration	16%	14%
To increase my mental alertness	15%	16%
Feeling good about myself	15%	15%
Maintaining a quality of life	15%	17%

Top 12 Wellness Goals	For Kids
Become physically fit	22%
Have more energy and stamina	22%
Have a sharp memory/concentration	18%
Avoid or manage diseases	18%
Prevent sickness or diseases	18%
Have better digestive health	17%
Keep their mind stimulated	16%
To increase their mental alertness	16%
Be a good example for others	16%
Feel good about themselves	15%
To be able to think quickly	15%
Live a long life	15%

Almond Benefit Delivery

% Agree Strongly	Eat Almonds Before Breakfast	Don't Eat Almonds Before Breakfast
Good to eat in the morning	58%	51%
Good for my brain	58%	52%
The king of dry fruits	58%	50%
Good for my heart	58%	48%
Is energizing	58%	51%
My favorite dry fruit	58%	49%
Good for my mental acuity	57%	50%
Is fresh	57%	46%
Good for my hair	57%	48%
Recommended by my nutritionist/dietician	57%	49%
Provides energy	57%	51%
Is high quality	57%	52%



INDIANS ARE DRIVEN BY SUCCESS. BEING HEALTHY IS SEEN TO BE KEY TO BEING SUCCESSFUL.

"If you want to be disease free..."

"If you want to be happy..."

"It is for your family's peace and happiness."

"When you are healthy, you feel confident."

"If you are healthy nothing will stop you and you will be successful."

"Health is also fitness and, if you want to look good and slim, health is important!"

"If you are healthy, your future is secure!"

Lifestyle upgradation drives people today

Acquisition and ownership of symbols is now essential. Consumers are willing to extend themselves or stretch their resources because they don't want to be left behind

Bettering the self is a universal desire

- Honing skills and upskilling
- Developing talents
- Exploring the "new and different" to enrich oneself

The reward of bettering self and performing consistently is to have a sustained advantage

- Building excellence
- Honing and playing to one's strengths

Moms also encourage this need for betterment and performance in their kids

Extracurricular activities are seen as opportunities to improve or learn new skills or perform in front of an audience and receive accolades

Performance

Give everything you take up your 100%, with concentration

Do a better and faster job

Stand out for it; get a promotion

Get noticed by others

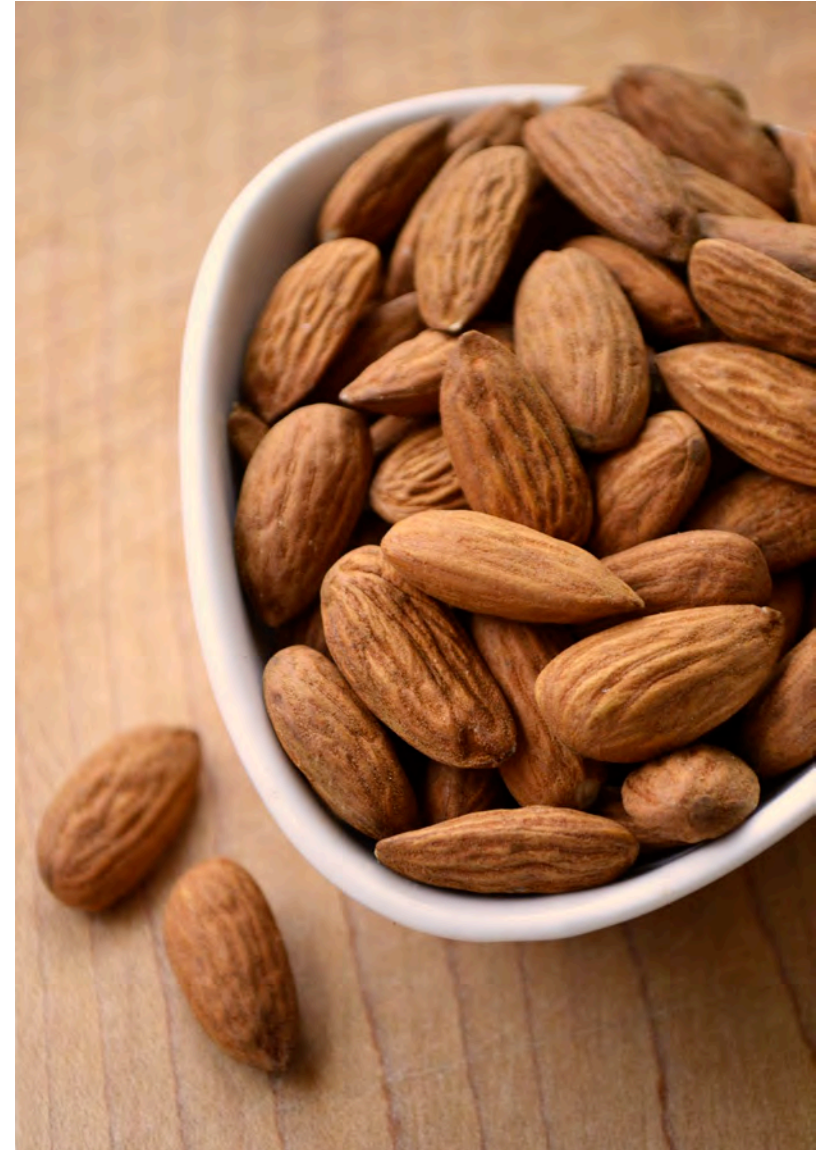
Be successful

THE POSITIONING



*“Small investments today build into
the big successes of tomorrow.
Almonds are a small investment into
my and my family’s future.”*

HARNESSING THE OPPORTUNITY



CONSUMER EDUCATION OPPORTUNITY

- Beliefs come from tradition, therefore, lower awareness of benefits coming from extensive nutrition research.
- Opportunity to position almonds as being good for immunity by leveraging nutrients.
 - Almonds are high in Vitamin E and Copper.
 - Almonds are a source of Zinc, Folate and Iron.
- Could further increase frequency, snacking and portion size.



CONSUMER EDUCATION PROGRAM

PRINT ADVERTORIALS

NUTRITION PR

MEDIA OUTREACH

MEDIA EVENTS



Snack the tough
When it comes to your children, there are some apprehensions you just can't get past easily. Will they do well in school? Are they healthy? Will they be safe? Parenthood is loaded with puzzles and enigmas. And their communication is untranslatable. The "Yes," "No," "Maybe" don't help either.

Your kids might not talk to you as much, but they are always watching you. Give them something good to imitate. Not having a handful of almonds daily. After all, almonds are high in calcium and a source of fiber and iron, all of which contribute to the normal functioning and development of the immune system. In fact, almonds are high in vitamin E, which is known to offer protection against infections caused by viruses and bacteria.

Double the health, double the fun!
Getting everybody out of the house in the morning can be a really tough task. From the minute you get up, to you drop them off at school to go to school, go to school, go to school, you are speed-peddling a little for your kids. You might want to consider the addition of dairy based nutrition, like Samadhis. Although more commonly consumed,

A CHILD'S HEALTH AND IMMUNITY NEED SO MUCH ATTENTION THAT GOD MADE MOMS, AND ALMONDS NATURALLY.



Multiple information is based on 100g

Tomorrow Begins Today

Heart Healthy • Antioxidant Rich

California almonds

Energy Packed • Anytime Snack

Eating almonds daily may just be the solution you were seeking to keep wrinkles at bay

Dermatologists have long known that wrinkles are caused by a combination of factors, including age, sun exposure, and genetics. But a new study suggests that eating almonds daily may help reduce the appearance of wrinkles. Almonds are rich in antioxidants, particularly vitamin E, which helps protect the skin from oxidative damage caused by free radicals. Additionally, almonds contain healthy fats that help maintain the skin's moisture barrier, preventing dryness and flaking. The study found that participants who consumed almonds daily showed a significant reduction in the number and depth of wrinkles over a 12-week period.



Snacking on almonds is good for your heart

Eating almonds instead of typical snacks may reduce the drop in heart rate variability (HRV) that occurs during mental stress, thereby improving cardiac function, a study says.

Mental stress is among the psycho-social factors thought to contribute to cardiovascular disease risk, said researchers from King's College London, UK.

"The finding was part of the Almonds Trial Targeting Dietary Intervention with Snacks (ATTIS) study, where participants with cardiovascular disease risk consumed a daily snack of almonds or a calorie-matched control snack that provided 20 per cent of their estimated daily energy needs.

Power up your diet with almonds

Yogis and every other form of exercise imbues the concept of whole health - healthy eating, a powerful mind and fit body. Making small changes to your diet, can go a long way in building overall health and your fitness routine. Rich in several nutrients such as Vitamin E, magnesium, phosphorus, and a host of antioxidants, almonds are a great way to start, say experts.

Stressing on the need to start right before beginning your fitness journey, Shoba Krishnamoorti, Nutrition and Wellness Consultant, says, "In India, there is now an increased interest towards exploring ancient traditions of eating or food preparation to counter lifestyle diseases. Along with practicing yoga, it's important to consider healthy eating, and a good way to start is by adding nutrient-rich foods like almonds to the diet. Eating almonds may also help in weight management."

Commenting on the need to snack right while starting a yoga journey, Madhuri Ravi, Fitness Expert and Diet and Nutrition Consultant, says, "Eat right to control while practicing yoga, so proper nutrition of the body sets the foundation for a strong yoga routine. Lately, professionals find almonds as they are rich in plant-based protein, and protein helps keep a person satiated. Almonds also help in regulating the hunger hormone ghrelin, which in turn helps towards loving your cravings under control."



त्योहार में ये 3 चीजें बच्चे को रखेंगी तंदुरुस्त

भारत में त्योहारों का मौसम शुरू हो चुका है। बच्चों के लिए फेस्टिवल का मासूम है तंदुरुस्त और स्वस्थ बच्चे को रखने के लिए हमें कुछ चीजें खाने में शामिल करनी चाहिए।

बादाम बनाएंगे अंदर से तंदुरुस्त
बादाम को खाने से बच्चे को तंदुरुस्त रखने में मदद मिलेगी। बादाम में विटामिन ई, मैग्नीशियम और फोस्फोरस का अच्छा स्रोत है। यह बच्चे को तंदुरुस्त रखने में मदद करेगा।

सब्जियां बच्चे को तंदुरुस्त रखेंगी
सब्जियां बच्चे को तंदुरुस्त रखने में मदद करेगी। सब्जियों में विटामिन और खनिजों का अच्छा स्रोत है। बच्चे को तंदुरुस्त रखने में मदद करेगी।

हल्दी खाने से तंदुरुस्त
हल्दी खाने से बच्चे को तंदुरुस्त रखने में मदद मिलेगी। हल्दी में एंटी-इंफ्लेमेटरी गुण हैं, जो बच्चे को तंदुरुस्त रखने में मदद करेगा।



Almonds, the simple immunity booster

EXPERT FEATURES

THE Almond Board of California hosted a panel discussion titled, *The Importance of Ensuring Family Health and Nutrition amidst a Pandemic*. Raj Shrivastava moderated the panel consisting of Hollywood actress Sita Al Khan, Malhar Raju (Fitness Expert and Diet & Nutrition Consultant), Ritika Samadhis (Regional Head - Diets), Max Health-care, Delhi and Emily Fleishman, VP Global Marketing Development, Almond

immune function," said Khan. Samadhis advised that items like almonds, seasonal fruits, vegetables and probiotics should be a dietary must, as these are nutrient-rich and aid overall health. "Especially important for those having blood pressure, diabetes and obesity as they are more at risk for COVID-19," he said.

The best time to consume almonds, said Samadhis, is between meal times - mid-morning and early evening. The soluble vitamins are better digested if the almonds

most important thing we can do to begin to add a handful of almonds to your family's diet.

"As we learn to adjust to this new sense of normal, the most important thing we can do is to begin to lead a healthier lifestyle inclusive of proper nutrition, including immunity strengthening foods. A good way to begin to add a handful of almonds to your family's diet."

Sita Al Khan, Bollywood actress

"We, as a family, prefer almonds. It's a great source of energy, healthy proteins, and healthy fats," she continued.



DISCUSSION OVER ALMONDS (BADAM PE CHARCHA)

THEME: 'THE IMPORTANCE OF ENSURING FAMILY HEALTH AND NUTRITION AMIDST THE ONGOING PANDEMIC'



Sakal

A HANDFUL OF NUTRITION

Almonds are a rich source of micronutrients. MUSBA HASHMI speaks with experts to tell you how adding almonds in your diet can help boost immunity and ensure overall wellbeing

Those were to ask what is it with Almy fruits these days, then the answer is simple — the need for boosting immunity.

In the wake of the pandemic, all people want is to ensure their family's health and strengthen their immune system to fight off infections. This is making them take to all kind of immunity booster supplements and Vitamin C capsules. However, a simple easily available ingredient — almonds — can do the job for them.

Bilika Samadhar Regional Head — Diseases, Max Healthcare — Delhi, tells you that regular intake of lots of fruits and vegetables, having a balanced diet and a handful of almonds is all what people need to give their immune system a boost.

"The current pandemic has highlighted more than ever, the need for proper nutrition amongst Indian families. Many absolutely important for families to revisit their diet and healthcare habits, and adjust to the new normal. Whether you are suffering from one of the aforementioned ailments, or are at risk, be sure to include nuts like almonds, seasonal fruits, vegetables and probiotics that are nutrient rich and add to the body's overall health," Samadhar says, who was a part of the discussion on the importance of ensuring family health and nutrition amidst a pandemic, organised by the Almond Board of California.

Not just that, one of the many benefits of eating California almonds is that it helps to make one feel good and also keep the hunger pangs at bay.

This is the best food to snack on and makes you feel full. The ones who are on diet can eat almonds without fearing weight gain because it is full of micronutrients," says Madhuri Buta, Diet & Nutrition Specialist at 100 per cent, she says.

and it is indeed a good option. "Soaking almonds are good because there are a lot of soluble elements in them, when you soak it the nutrients are better absorbed. But, don't peel it because then you are discarding the fibre," Samadhar tells you.

Family Fleishman, VP — Global Marketing Development, Almond Board of California tells you that during the pandemic, the Almond Board of California has been persistently working towards educating consumers on the importance of proper nutrition and the need to maintain a healthy lifestyle.

"We have also invested in years of scientific research to understand almond health benefits across heart health, diabetes and weight management and skin health — which are all relevant to Indian consumers, especially now. Awareness around good food choices, and snacking habits is key in leading a healthy lifestyle, and for us, it's important to make sure that families across India have access to this information," Fleishman says.

The Pioneer



Almonds, the simple immunity booster

EXPRESS FEATURES

THE Almond Board of California hosted a panel discussion titled, *The Importance of ensuring Family Health and Nutrition amidst a Pandemic*. RJ Shezzi moderated the panel consisting of Bollywood actress Soha Ali Khan, Madhuri

immune function," said Khan. Samadhar advised that nuts like almonds, seasonal fruits, vegetables and probiotics should be a dietary must as these are nutrient-rich and aid overall health. "Especially important for those having blood pressure, diabetes and obesity as they are more at risk for COVID-19," he said.

"The best time to consume almonds, said Samadhar, is in between meal times — mid-morning and early evening.

The New Indian Express



The Pioneer

TRADE: REINFORCING CONFIDENCE

Trade Conference



Trade Newsletters

FESTIVE NEWSLETTER 2019-20

Television Advertising

A recent market research indicated that almonds have a huge opportunity to grow and become the first choice of gifts for healthy Indians. And what better occasion to leverage this insight than the Diwali season? A period where it is considered to be auspicious to gift almonds.

Diwali is all about the little gestures between loved ones. The Almond Board of California aired a campaign based around this insight, which positions almonds as a gift which focuses close relationships. The first commercial portrayed two close friends, Neeraj and Sarah. Their friendship was brought to life in the little things they did for each other. Came Diwali, the two friends exchange gifts of almonds. A gift that is healthy, thoughtful and in many ways, typical of their friendship.

In the second commercial, we have a maternal aunt, or masai, and her nephews. We see how they are each other's friend, helping and lifting each other throughout their lives. When the boy is grown up and married, he comes to visit his masai with his wife and a gift of almonds, honouring the effortless bond that they share.

Through these commercials, not only do we strengthen the credentials of almonds as a traditional gift, we also expand our traditional audience beyond the immediate family by exploring the areas of friendship and the modern aunt-nephew relationship.

The commercials were broadcast on several leading television channels like Star Plus, Sony TV, & TV, Bflix Movies, 9X, Zee, Colors Marathi and News 24.

WINTER NEWSLETTER 2019-20

In India, winters are very important for almond consumption. To make the most of this period, the Almond Board of California created a campaign that talks about the benefits of almonds. The latest edition of the Almond Board Bulletin outlines our marketing efforts for the winter period.

Television Advertising

This year, the Almond Board of California launched a new Family Consumption Campaign under the umbrella brand message 'Tomorrow Begins Today'. Three new television commercials were launched targeted towards mothers giving almonds to their children, and working men and women consuming almonds themselves. Each commercial had a unique story that revolved around the thought of how dreams are best when shared with your family. Almonds were their constant companions in all the TV commercials.

The first commercial looked at a mother sharing her son's dreams and supporting him in all spheres of life. With his mother's unwavering support, the son excels in both academics and sports. He practices batting with his father and later goes on to win the cricket match. He studies hard and wins the Maths Championship at school. Towards the end of the commercial, we see him logging the perfect job abroad. Almonds were with him throughout his journey.

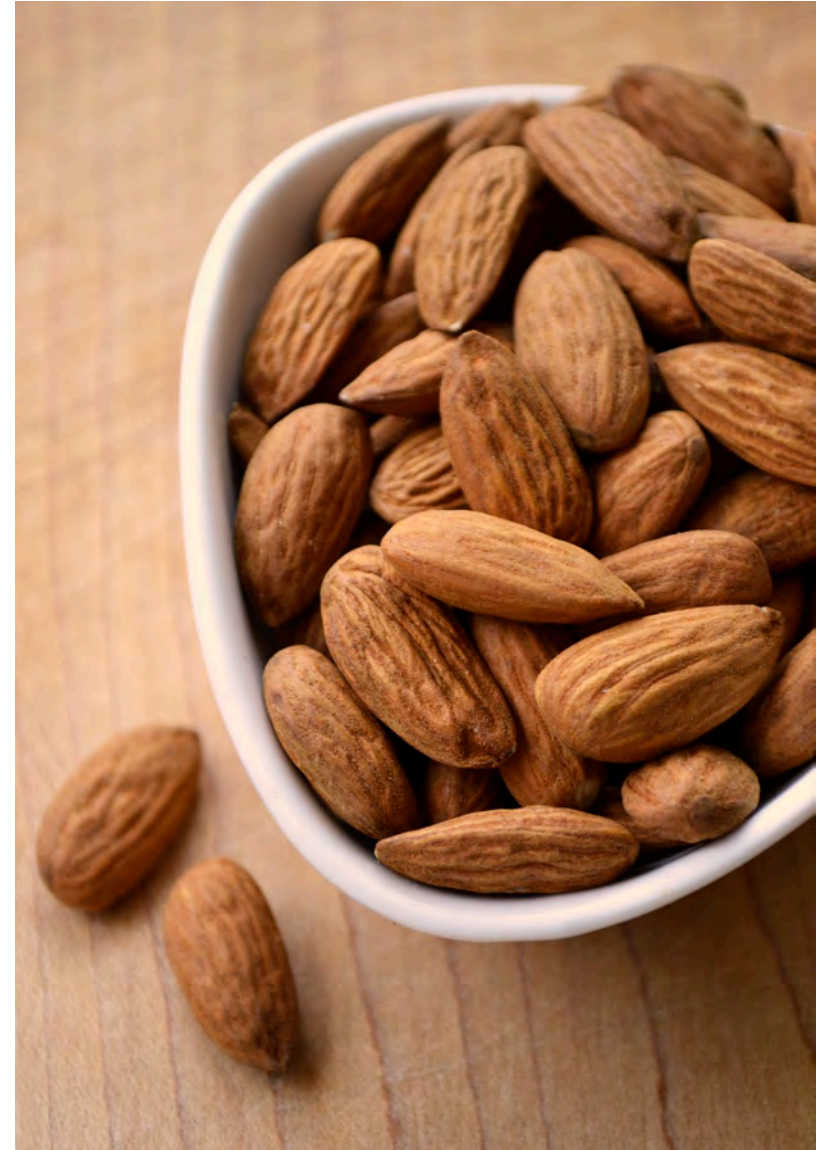
The second commercial looked at an architect who is an ideal husband, a father and an employee. The film opens on him sketching the dream home for his family, while munching on almonds at the breakfast table. He makes this dream home a reality, bringing great joy to his wife and son. We see him excel at work and earn praise from his boss. Not only is he successful at work, but he also has caring values. He gives up his space in an elevator for an elderly lady and takes the stairs instead. In the end, we see him contentedly looking at his family's picture in front of their dream home, while working at his desk. Throughout his journey almonds are his constant companions.

Finally, the third commercial looked at a young woman who is a wife, a mother and a successful professional who manages to strike the perfect balance between her professional and personal life. The film opens on the woman grappling with a handful of almonds and heading to work. When her team is struggling to solve a problem, she takes the lead and solves the problem, winning appreciation from everyone at work. Not only does she excel at work, but she also takes equal interest in her daughter's life. They practice jump rope at home before taking part in a school competition, which they eventually win. And it's a handful of almonds that give her energy throughout the day and help her move ahead in life.

The commercials were broadcast on several leading channels, such as Star Plus, Sony Entertainment Television, Zee TV, UTV Movies, Bflix Movies, News 24, India News, 9X, Zee, Colors, Colors Marathi, Sony Marathi, TFC, Animal Planet, ETV Sikkim, Colors Tamil, Sun TV, Zee Bangla, Colors Bangla and News 18 Odia.

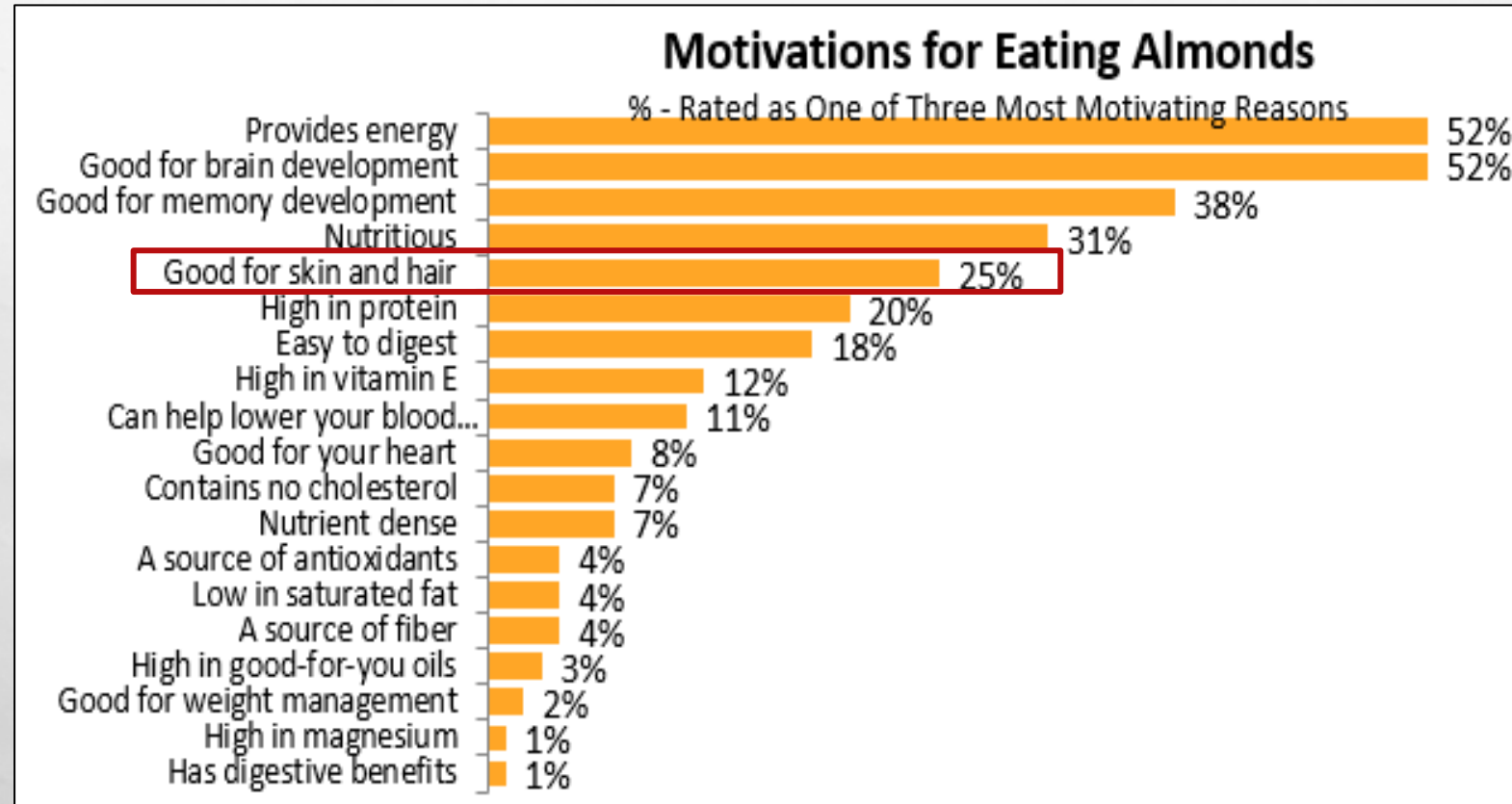
75,076 times across leading channels
Over 100 weeks

NEW PROGRAM INITIATIVES IN INDIA



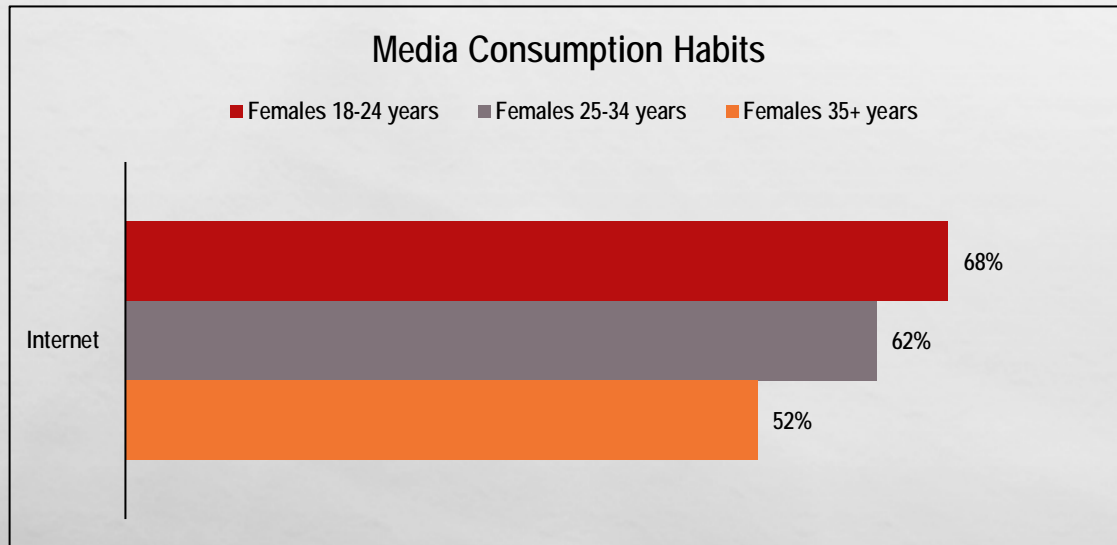
BEAUTY DIGITAL CAMPAIGN

BEAUTY BENEFITS: MOTIVATOR FOR ENHANCED CONSUMPTION



BEAUTY PROGRAM: TARGETING A YOUNGER AUDIENCE

- When we look at the beauty benefit, we see that a younger audience (females, 18-24 years) are more attractive to target as compared to older women:
 - Strongly believe being well-groomed is essential for success
 - Believe that looking after their health improves their appearance
 - Believe that beauty comes from within
 - Believe in herbal/ natural products over chemical cosmetics.
- Higher usage of internet compared to older women.



CAMPAIGN SHOWCASE



RELOOKING AT THE FESTIVE PERIOD

FESTIVE COMMUNICATION: ADAPTED TO CURRENT SITUATION

- Covid-19 could result in muted festive gifting.
 - Social Distancing: Reduction of people visiting each other to give gifts.
 - Economy: Economy expected to degrow in FY 20-21 resulting in employment continuity concerns with possible reduced Diwali bonuses.
 - Prioritization of health of self and family... More important than gifting to others.

SO...

- Replace current 4-week Festive Broadcast Wave with:
 - Family Consumption Broadcast Wave for 4 weeks to drive health messaging of almonds.
 - Festive Broadcast Wave for 2 weeks to remind consumers of gifting of almonds closer to Diwali (14th Nov).
 - Digital Campaign promoting Festive Broadcast Spots on Facebook, Instagram & YouTube.



Diwali Massi/ Aunt TVC



Diwali BFF TVC



Mother Child



Working Man

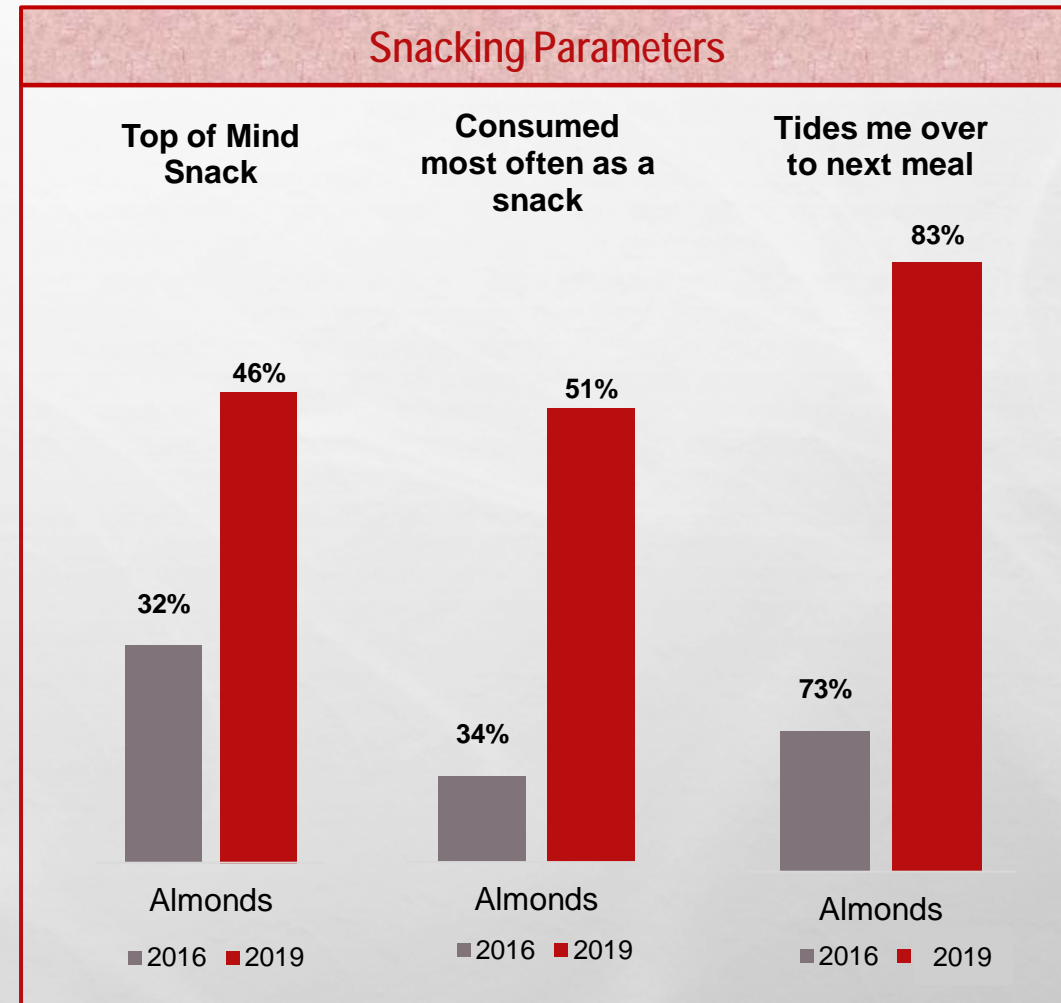
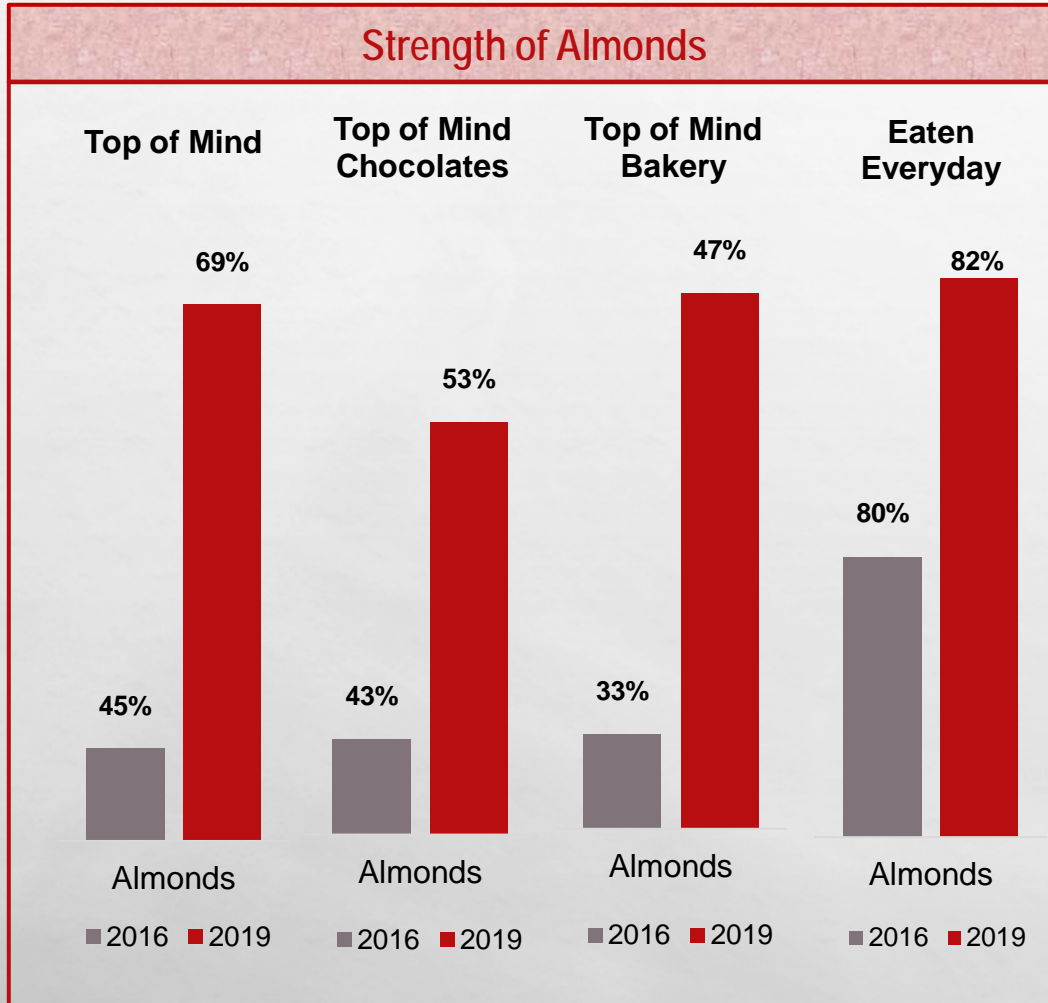


Working Woman

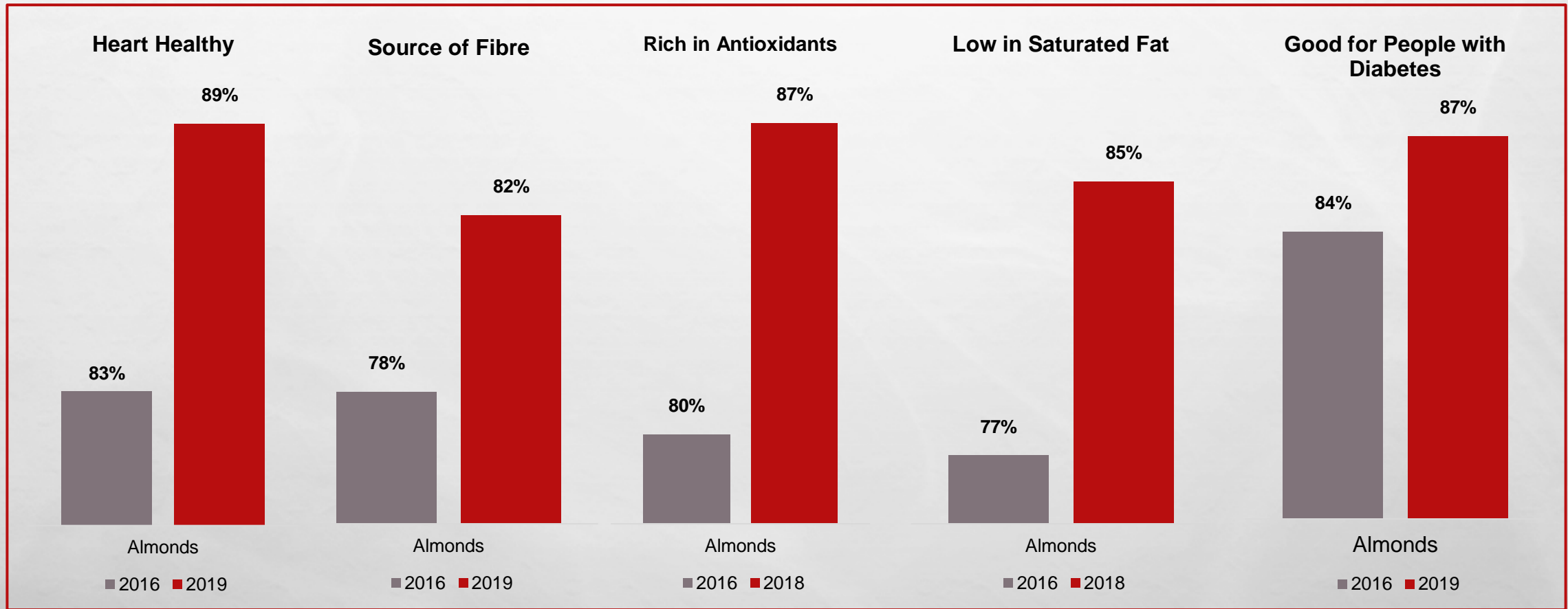
THE RESULTS



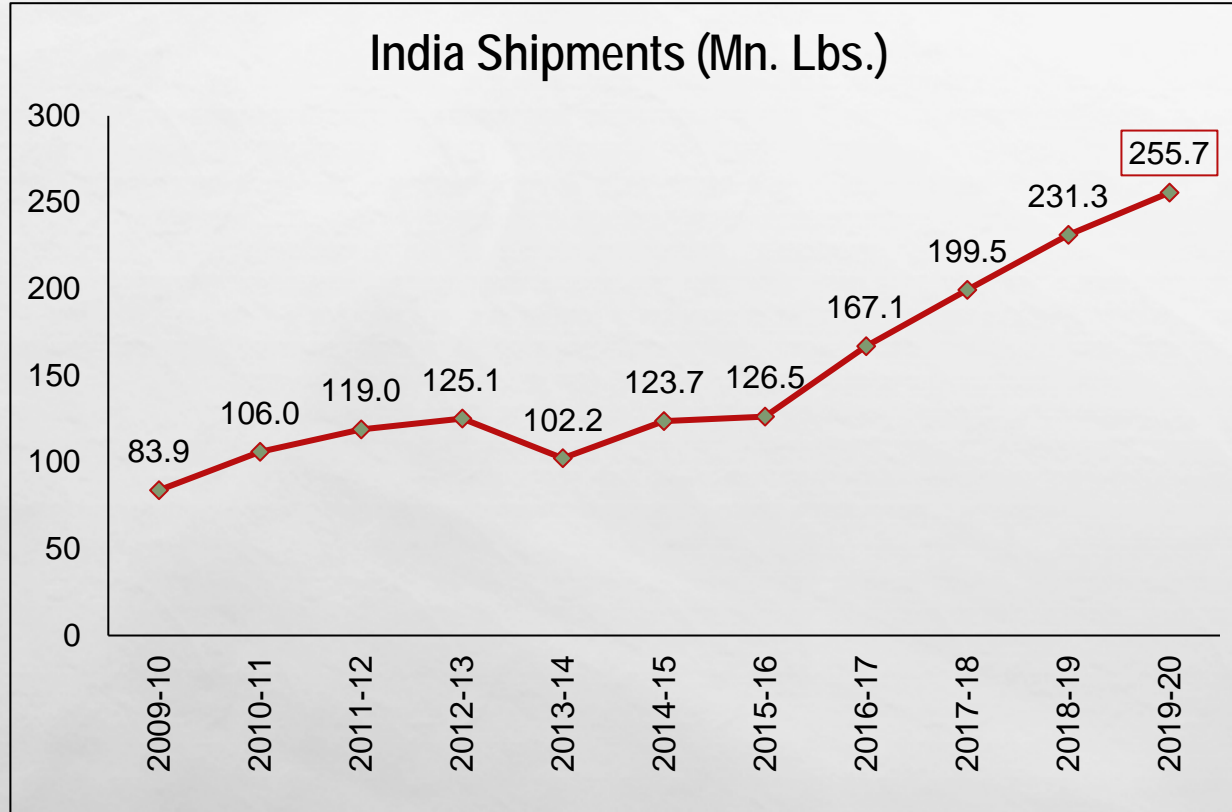
GROWING STRENGTH OF ALMONDS AND AS A SNACK



INCREASED KNOWLEDGE OF ALMOND BENEFITS



INDIA: THE #1 EXPORT MARKET, 2ND YEAR IN A ROW



Thank
You!

