



*the Almond*  
**CONFERENCE**  
2019

**India: Strong Today,  
Stronger Tomorrow**

 **california  
almonds**<sup>®</sup>  
Almond Board of California

# CEU Instructions

## Who needs CEUs?

Growers (Private Applicator Certificate), Pest Control Advisors (PCA), Qualified Applicator License (QAL), Qualified Applicator Certificate (QAC), Certified Crop Advisor (CCA)

## What types of CEUs are offered at The Almond Conference?

Tuesday: CCA • Wednesday: CCA and DPR • Thursday: CCA

## Sign-in sheets

Sign-in sheets are in the back of each session room.

## CCA CEUs

You are responsible for signing in and out of the session you are attending. No verification forms will be provided.

## DPR CEUs

Pick up DPR scantrons at the CEU kiosk. Sign in at the beginning and sign out at the end of each session you attend. **It is your responsibility to complete and turn in your scantron at the end of the day to the CEU kiosk.** If you need to leave a session early, you must sign out at the back of the room to adjust your hours. If you do not sign in or out at each of the sessions you attend, you will not get credit. Once you turn in your scantron at the CEU kiosk, you will receive a verification form.

## Special instructions for Wednesday

Those obtaining DPR credits will need to pick up their scantrons in the morning at the CEU kiosk before the first session of the day. There will be **three different scantrons, one for each session offering DPR credits.** You will need to return your scantrons at the end of the day to the booth or back of the classroom if you are done attending sessions. This is in addition to signing in and out of each session you attend.

## CEU Kiosk Hours

### TUESDAY:

7:30–10:00 a.m.

3:30–5:00 p.m.

### WEDNESDAY:

7:30–10:00 a.m.

3:30–5:00 p.m.

### THURSDAY:

9:00 a.m.–12:30 p.m.

Special thanks to the 2019 Silver Sponsor, TOMRA Sorting Solutions, for supporting the registration and CEU kiosks.





# India

Where We've Been and Where We're Going

# Agenda

## The Changing Regulatory Landscape

Julie Adams,  
Vice President Global  
Technical, Regulatory &  
Government Affairs, ABC



## Leveraging the Strong Almond Opportunity

Sudarshan Mazumdar,  
Regional Director India/  
South Korea/ Japan, ABC



## Segmentation Study FY 18-19

Laurel Muir, Managing  
Partner, SRG



## Building a Stronger Tomorrow

Sudarshan Mazumdar,  
Regional Director India/  
South Korea/ Japan, ABC

## Agenda

### The Changing Regulatory Landscape

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**India: Are we  
Succeeding in this  
Challenging Trade  
Environment?**



**E.U.:**  
Brexit  
Import testing  
Pesticide MRLs



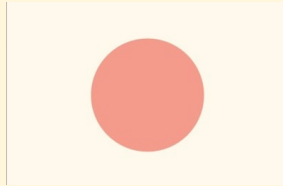
**China:**  
60% tariff on kernel/inshell U.S. almonds  
20% tariff on preserved nuts (in cans)  
40% tariff on processed or preserved



**Turkey:**  
25% tariff on U.S. Almonds



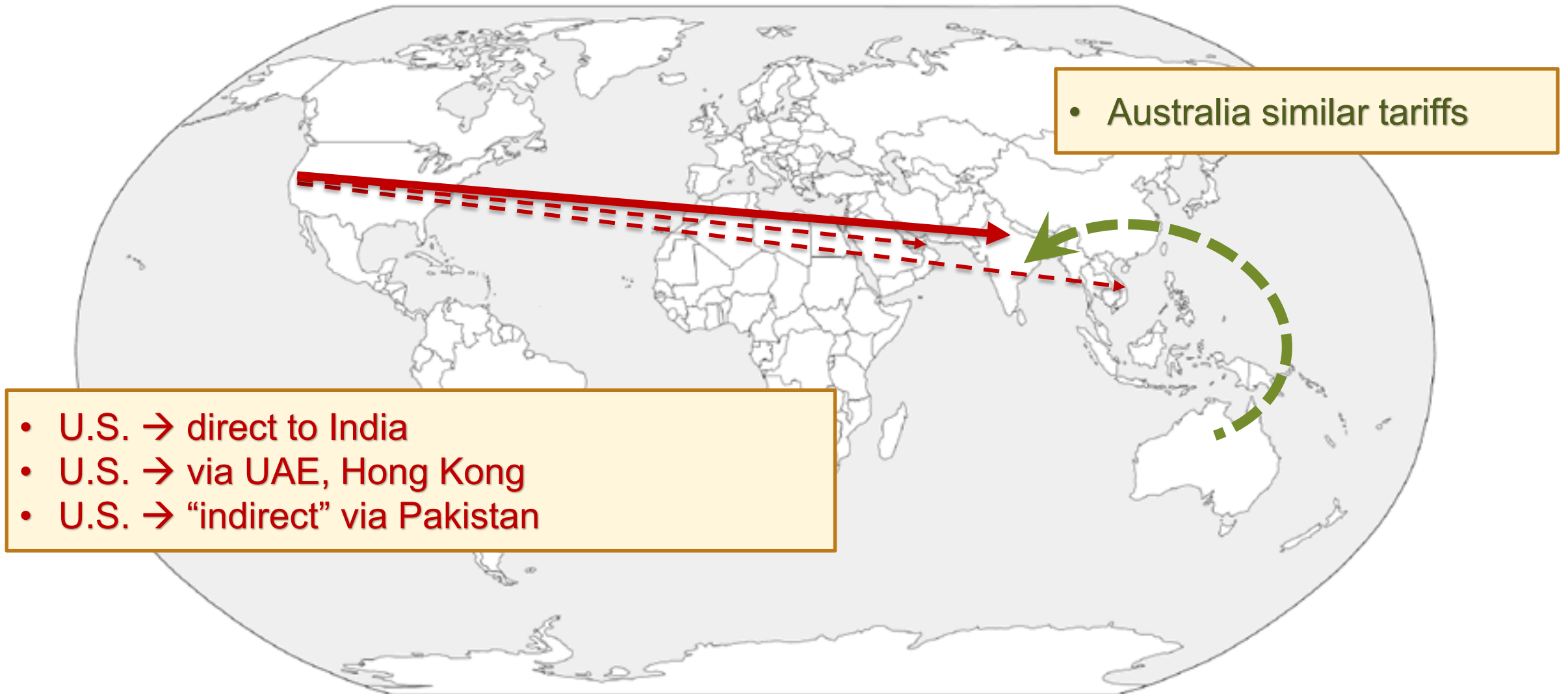
**Japan:**  
“Partial” FTA  
Import testing



**India:**  
35→41 rupees/kg on inshell  
100→120 rupees/kg on kernels  
Labeling “bulk” consignments  
Grades/standards  
GST

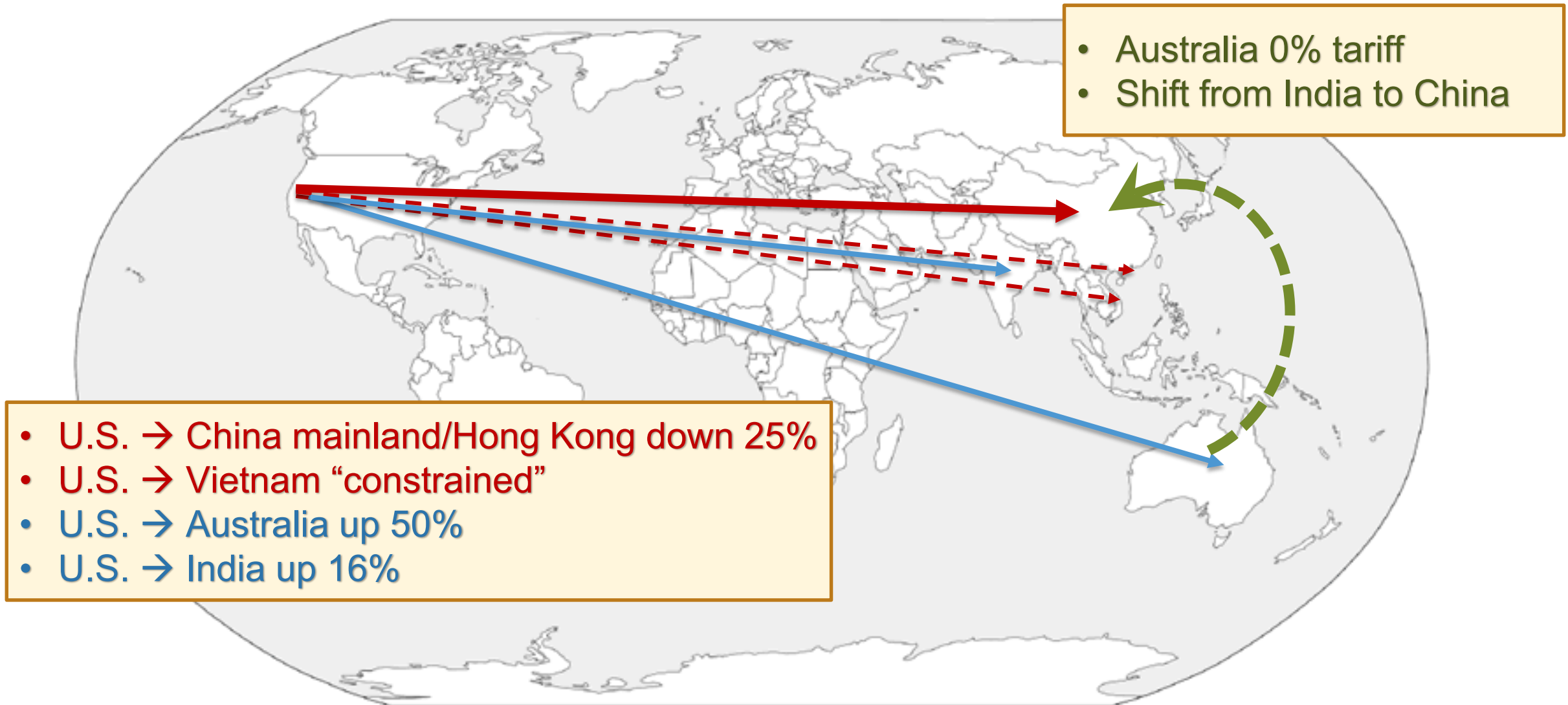


## India Must be Viewed in a GLOBAL Context....





## But China was Impacting More than China Last Year!!






## Trade is More than Tariffs.....

- Now our #1 export market!
- Specific duty on U.S. almonds increased to **41 rps/kg** (inshell) and **120 rps/kg** (kernels) easier to address
- Efforts to expand food processing constrained by kernel tariff
- Still a better position for Australia – at lower tariff rates

## It's the *Non-Tariff* Issues that Get You.....

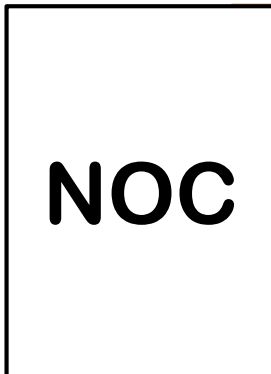
- 12% GST on almonds higher than cashew, walnuts, peanuts (5%)
- 0% tariff for “fresh” almonds – but no one knows what that means!
- Labelling non-retail containers back on the agenda
- Grades – when is a quality parameter *not* a food safety issue?

 <p>SHELL Soft shell, dark brown color, rough surface, high suture opening</p> <p>CLASSIFICATION California type, Nonpareil type</p>	<p>NUT Large, long narrow shape, light color, smooth surface</p> <p>CHARACTERISTICS Long and flat</p>
 <p>SHELL Soft shell, light color, high suture opening</p> <p>CLASSIFICATION Nonpareil type, California type</p>	<p>NUT Medium, flat shape, smooth surface</p> <p>CHARACTERISTICS Long and flat</p>
 <p>SHELL Soft shell, dark brown color, rough surface, high suture opening</p> <p>CLASSIFICATION California type</p>	<p>NUT Small, short narrow shape, fairly wrinkled surface</p> <p>CHARACTERISTICS Long and flat</p>

- Proposed kernel standards **do not** reflect commercial needs (should be published soon)
- Chip/scratched viewed as a food safety defect – which encourages efforts to “cover up” any mechanical defects
- Mold = aflatoxin, even when it doesn't



- Global standards being leveraged for labeling non-retail packaging
- Almonds a primary food – but confusion since bulk bags **do make their way** to the market
- FSSAI logo, importer details **not required** on bulk bags (but stay tuned....)



- No, this has not gone away, it's just dormant!
- Indian authorities agree that consignee “to order of shipper” is negotiable (should not require NOC). But....
- Customs wants to see “regulations” confirming that other countries **do not** require NOCs.....

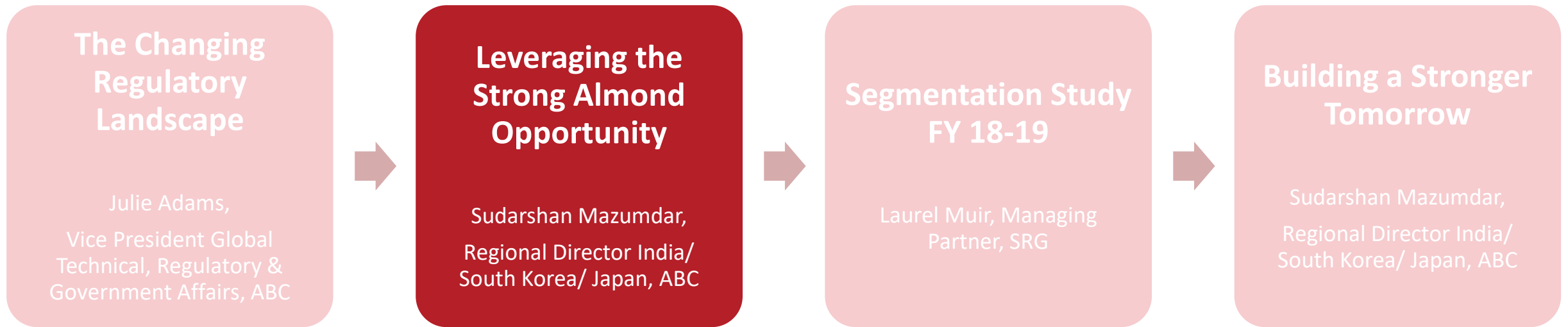
## Proving a Negative is the Big Challenge

# WHAT COMES NEXT...

- India – largest export market so need solutions!
- Need to engage government authorities and monitor emerging issues
- Drive with science, but respect culture
- Build coalitions – new importers, associations
- Expand education among processors for quality parameters, food safety standards
- **Watch what comes next on US-India trade agreement – *but don't expect miracles!***



# Agenda



**India: A Strong  
Market With Great  
Promise?**

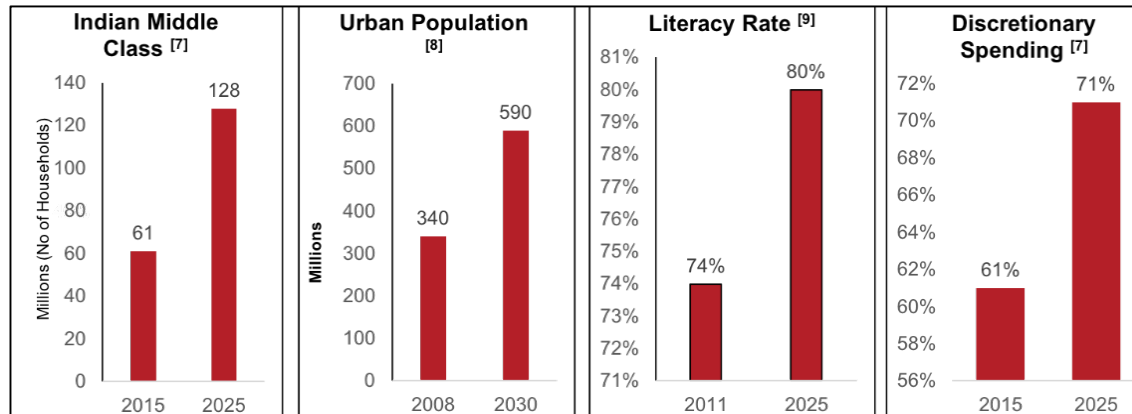


# India: A Large & Growing Market

World's 7th Largest Economy, with a GDP of \$2.7 Trillion\*

- Over five decades, India's GDP has ballooned, from **\$37 billion in 1960, to \$2.7 trillion** in 2018\*
- Economy projected to become 3<sup>rd</sup> largest by 2028\*\*
- Purchasing Power Parity – 3<sup>rd</sup> largest in the world\*\*\*
- Despite growth forecasts being cut by almost 1% for current year, India retains it's rank as the world's fastest growing major economy.\*\*\*\*\*

## Strength of Indian Economy



## Global Confidence

*“I look forward to the government’s goal of \$5 trillion and I think they (India) will hit the goal (of \$5 trillion economy) faster than they expect”*

**- Steven Mnuchin, US Treasury Secretary, October, 2019**

*“Growth will be supported by the lagged effects of monetary policy easing, a reduction in corporate income tax rates, recent measures to address corporate and environmental regulatory uncertainty, and government programmes to support rural consumption”*

**- IMF, October, 2019**



**Almonds in India?**



# Almonds: Availability & Formats

Available across the length & breadth of the country

Wholesale Market



Semi Wholesale



In Shell Almonds:  
Cracked in India



Mom n Pop Stores/  
Specialized Dry Fruit Stores



Organized Retail



Primarily sold loose



Loose by Weight



Private Labels



Packaged in India

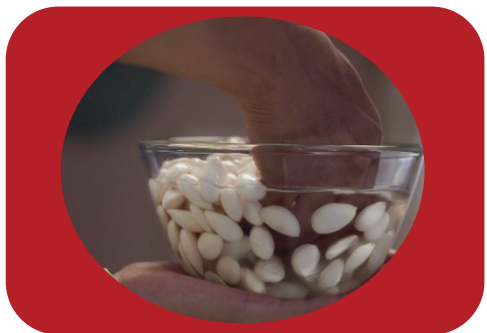


Imported Packs

# The Almond Opportunity



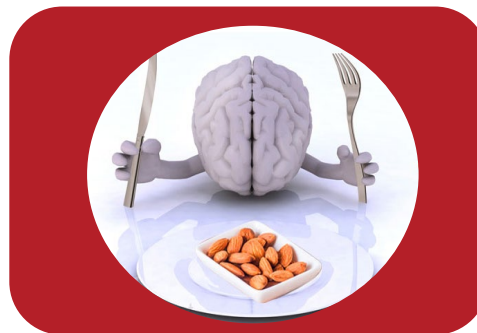
## Almond Consumption in India is Driven by Tradition



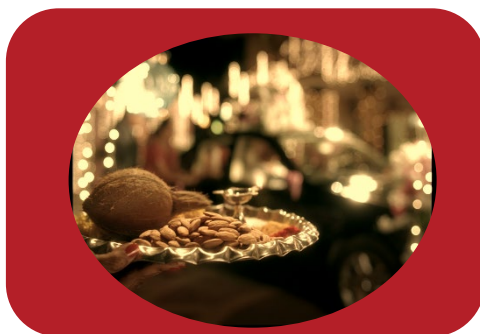
Consumed raw, soaked and peeled or raw first thing in the morning.



Given by mothers to children.



Good for the brain and provides energy through the day.



Gifted during festivals.



Accompaniment with wedding invites.



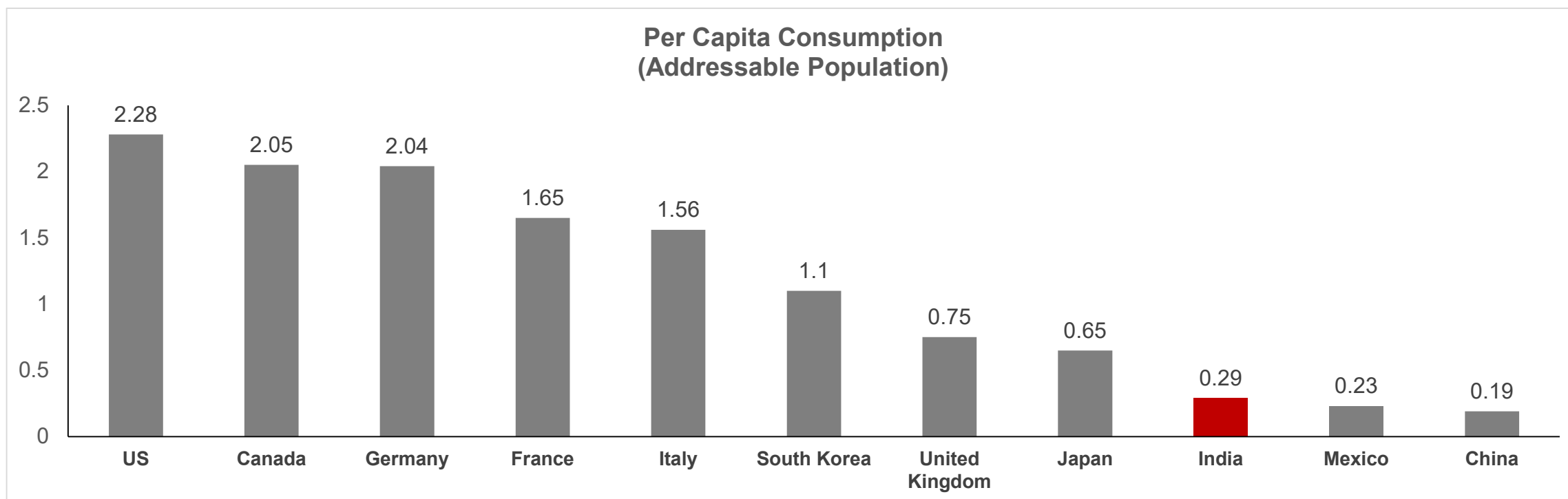
Integral part of prayer offerings.



Usually eat 4-5 almonds per consumption occasion.

## The Almond Opportunity in India

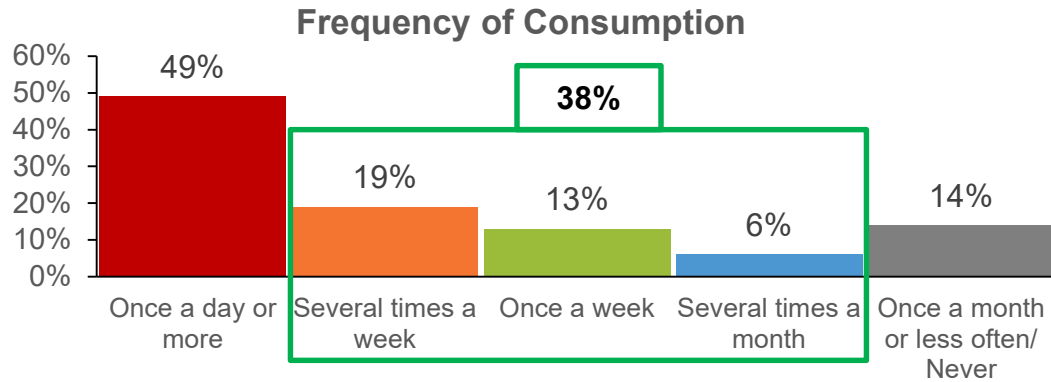
- As India's middle class households expand from 61 mn (2015) to 128 mn (2025), so does the opportunity for almonds. <sup>[1]</sup>
- India's per capita consumption (addressable population\*) at 0.29 is very low compared to other regions like USA (2.28), Canada (2.05) and Germany (2.04), showing an opportunity for market expansion. <sup>[2]</sup>



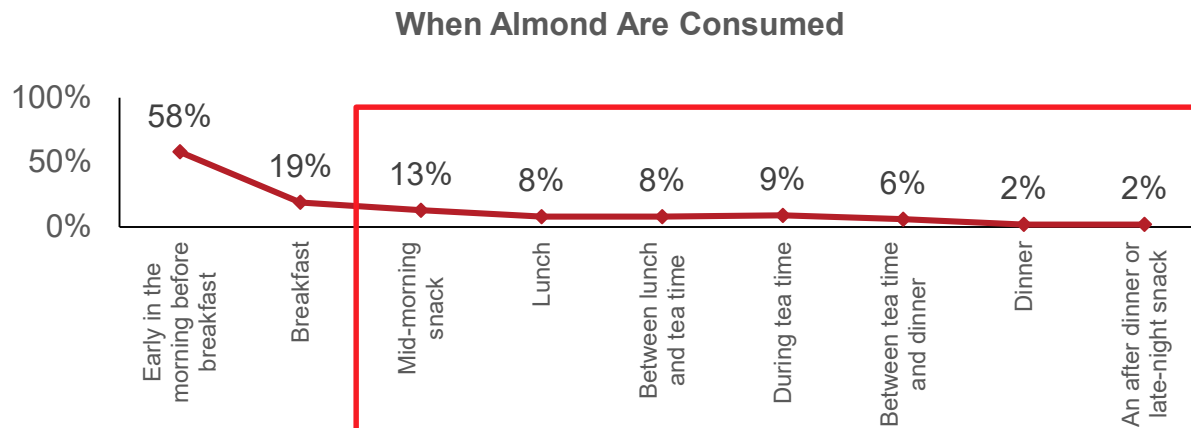
**\*Addressable population:** The percentage of a total population that is conceivably a potential consumer of almonds based on the development and urbanization of a region.

# Opportunities to Increase Consumption Exist

Opportunity to increase frequency of consumption.



Opportunity to increase frequency of consumption as a snack.



Compared to other nuts, Almonds are well positioned to take on the opportunity of 'year long' consumption

Best Dry Fruit Described by Positioning and Personality Trait (Total Sample n=2,810)				
	Almonds	Cashews	Peanuts	Pistachios
Is eaten throughout the year	46%	33%	11%	4%

Opportunity to increase portion size

How many almonds eaten per occasion	Total
Self	4.9
Spouse	5.0
Boy Child	4.5
Girl Child	4.7

# 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*

# 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 (n=2251)	Don't Eat Almonds Before Breakfast (n=1634)
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%

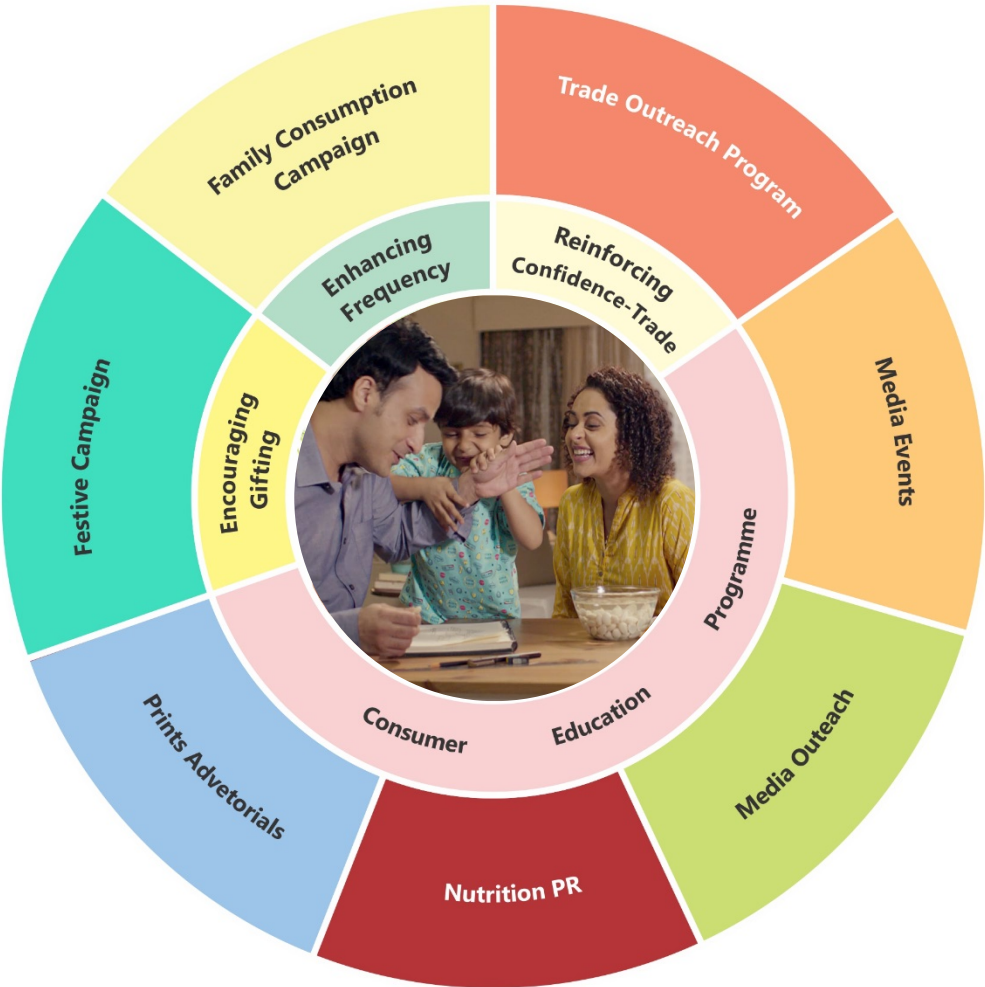




# Harnessing the Opportunity



# MARKETING PROGRAM



## Family Consumption Campaign



## Trade Outreach Program



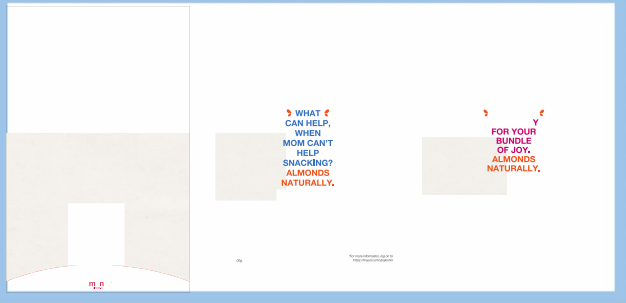
## Festive Campaign



## Media Events



## Print Advertorial



## Nutrition PR

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

**ALMONDS MAY HELP REDUCE WRINKLES**

Los Angeles Daily consumption of almonds may help reduce the severity of facial wrinkles, according to a new study. The study, published in the journal *Journal of the American Academy of Dermatology*, found that women who ate almonds daily had fewer wrinkles than those who did not.

Researchers at the University of California, Los Angeles, found that a daily snack of almonds helped improve the severity of wrinkles in women. The study involved 120 women who were given either almonds or a placebo for 12 weeks. The women who ate almonds showed a significant reduction in wrinkles compared to the placebo group.

The researchers suggest that the antioxidants in almonds may be responsible for the reduction in wrinkles. They recommend that women eat a small handful of almonds (about 1 ounce) each day to see the benefits.

**महिलाओं को झुर्रियां से बचा सकता है बादाम**

बदाम का दैनिक सेवन चेहरे की झुर्रियों को कम करने में मदद कर सकता है। इस अध्ययन में 120 महिलाओं को याद रखना चाहिए कि वे अपने चेहरे पर झुर्रियों को कम करने के लिए 12 सप्ताह के लिए प्रतिदिन एक छोटी सी (30 ग्राम) बादाम खाएं।

किसी भी स्वास्थ्य संबंधी समस्या के लिए डॉक्टर से सलाह लें।

## Media Outreach

**Why it is important to watch your mouth**

Watching your mouth is important for your health and your business. Almonds are a healthy snack that can help you watch your mouth.

Almonds are a healthy snack that can help you watch your mouth. They are rich in antioxidants and healthy fats, which can help reduce inflammation and improve skin health. Almonds are also a good source of fiber, which can help with digestion and keep you feeling full.

Almonds are a healthy snack that can help you watch your mouth. They are a good source of protein and healthy fats, which can help with weight management and overall health. Almonds are also a good source of antioxidants, which can help protect your cells from damage.

Almonds are a healthy snack that can help you watch your mouth. They are a good source of fiber and healthy fats, which can help with digestion and keep you feeling full. Almonds are also a good source of antioxidants, which can help protect your cells from damage.

# MARKETING PROGRAM

## Family Consumption Campaign



## Festive Campaign

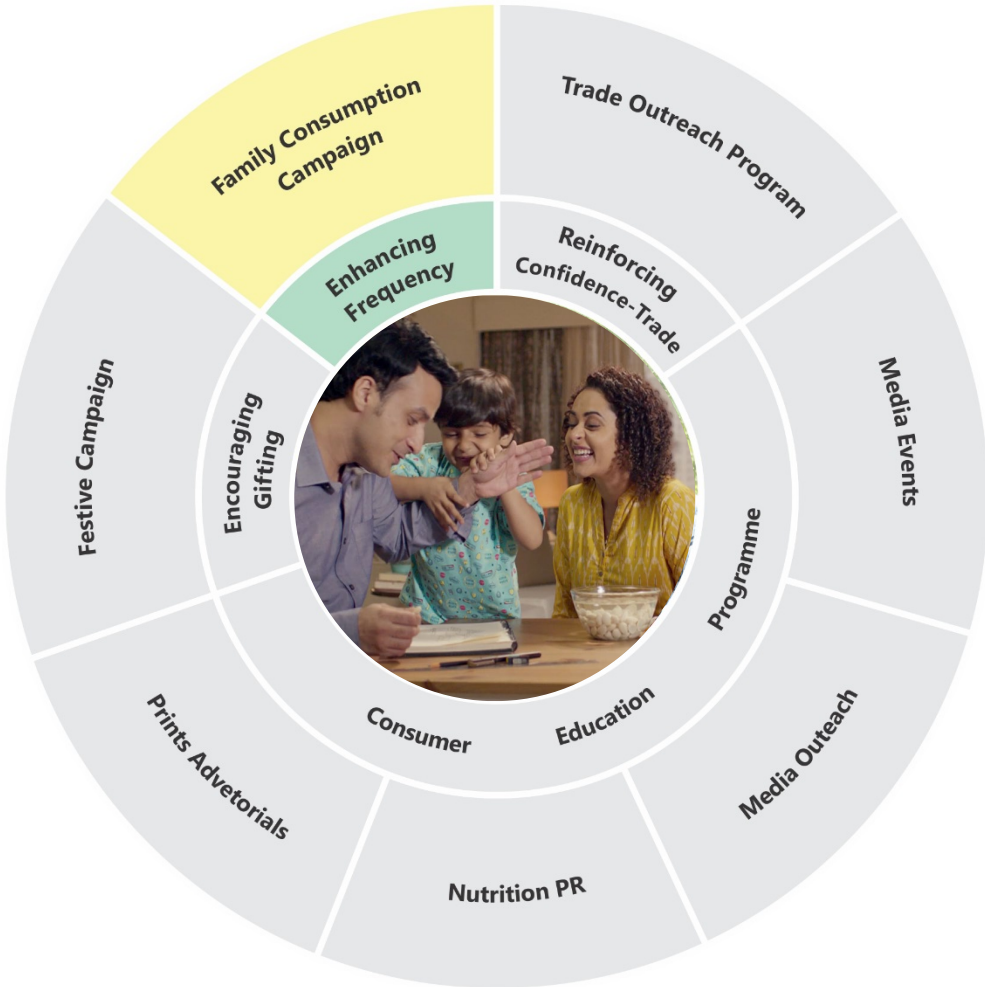


## Print Advertorial

**WHAT CAN HELP, WHEN MOM CAN'T HELP SNACKING? ALMONDS NATURALLY.**

**A BUNDLE OF ENERGY FOR YOUR BUNDLE OF JOY. ALMONDS NATURALLY.**

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



## Trade Outreach Program



## Media Events



## Nutrition PR

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

**ALMONDS MAY HELP REDUCE WRINKLES**

महिलाओं को झुर्रियां से बचा सकता है बादाम

बदाम का सेवन करीब 100 ग्राम की मात्रा में करने से महिलाओं को झुर्रियों को दूर रखने में मददगार हो सकता है। इस अध्ययन में 28 स्वस्थ महिलाओं को शामिल किया गया। 1 हफ्ते तक बच्चू को 60 ग्राम (340 कैलोरी) के बखर बादाम खाने को फिर 10 हफ्ते तक केवल फल-सब्जियों का सेवन करने को कहा गया, जिससे उनके त्वचा के झुर्रियों में 1.7 गुना तक बढ़ी। 10 हफ्ते बादाम खाने वाली महिलाओं की झुर्रियों में 10 प्रतिशत तक की कमी आई।

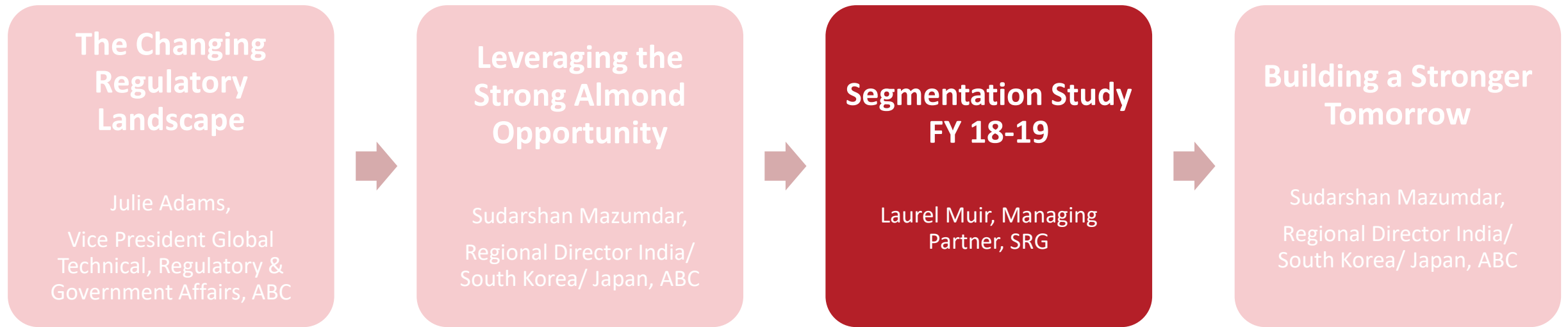
## Media Outreach

**Why it is important to watch your mouth**

Watching what you eat is essential for your health and helps you keep your teeth and gums healthy.

दिल्ली में खराब आसपास की हवा में फल-सब्जियों की कमी है।

# Agenda

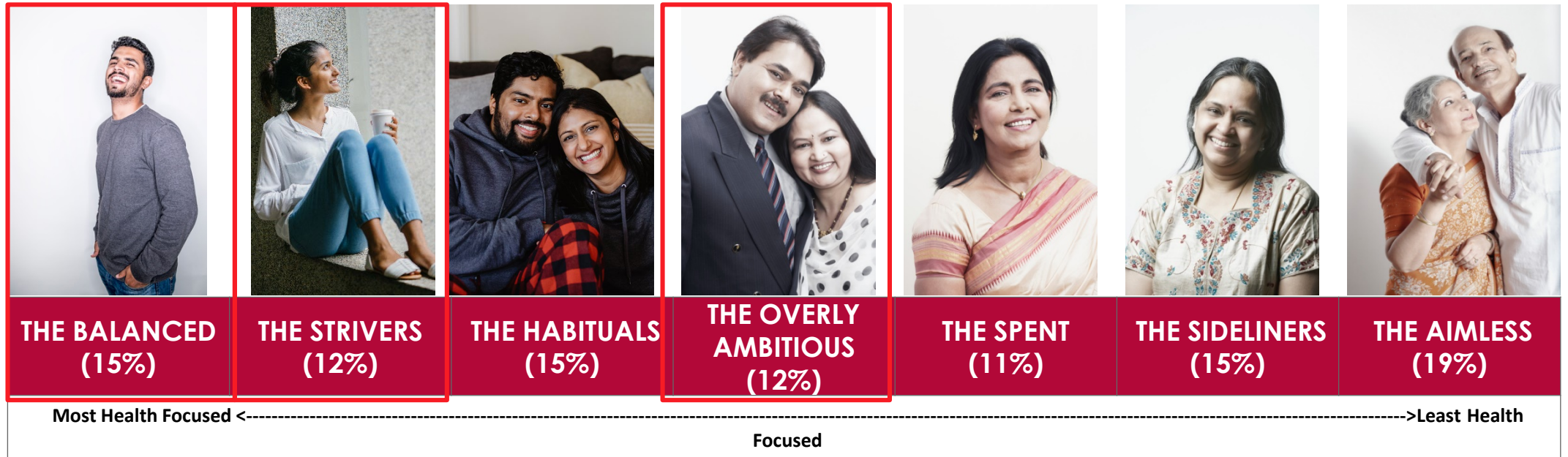




1

**It's only the beginning:  
New Target Opportunities**

# Consumers segment naturally fall onto a health and wellness continuum and show huge growth opportunities for almonds



A top-down view of a wooden surface. On the left, there is a pile of almond skins and some whole almonds. In the center, a large orange circle contains a white number '2'. To the right, a white bowl is filled with blanched almonds. The background is a light-colored wood grain.

2

**Morning Occasion has  
Tremendous Upside**

Even though the Morning Occasion is the largest usage of almonds, there remains penetration and frequent opportunities to drive growth.

- **Household penetration upside:** Based on the Segmentation Study, 40% of households with children are not currently engaged in the Morning Occasion.
- **Additional days:** Among households that do participate, average number of days is 2.8, essentially half the school week.
- **Portion size:** The daily serving per child is three or four almonds per occasion.





An aerial photograph of a bustling city street, likely in India, featuring a large, ornate clock tower on the right. The street is filled with yellow taxis, buses, and other vehicles. Buildings with numerous billboards and advertisements line the street. A large orange circle with a white number '3' is overlaid on the left side of the image.

3

# Unlocking the East

# Kolkata and the East show tremendous growth potential.

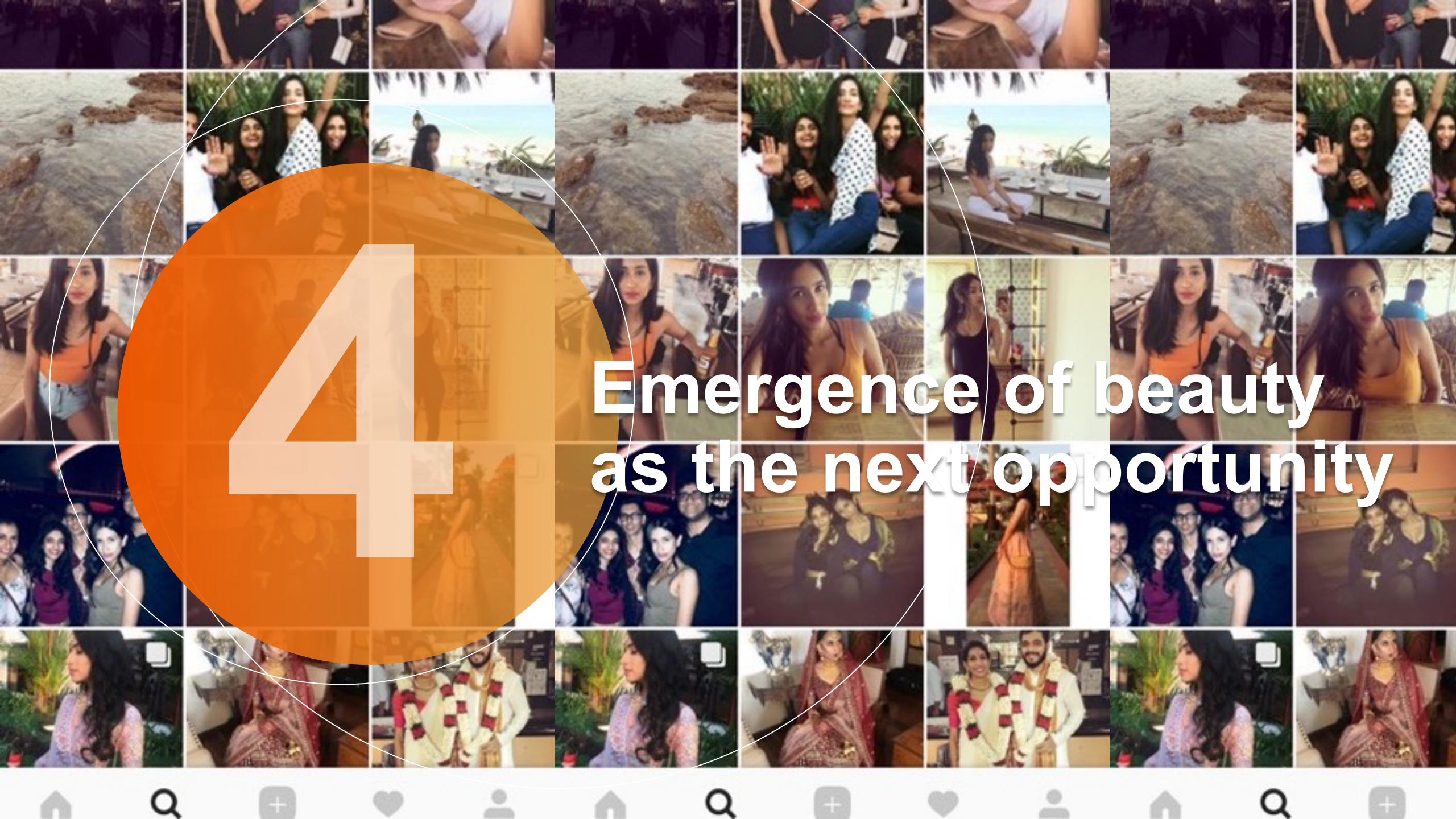
1. Increased health and wellness desires
2. Disproportionately high representation in the more health-conscious segments
3. Lower linkage between almonds and benefits
4. Lower usage of the morning occasion ritual
5. Almonds are soaked but not peeled
6. Dry fruit snacking behavior exists

*“We’ve never thought about health like this before. Now we are more health conscious, and trainers are telling people to eat almonds.”*



4

Emergence of beauty  
as the next opportunity



## And align with the values and imagery of almonds

- *Glowing skin*
- *Beautiful hair*
- *Attractive*
- *Good figure*
- *Slim*
- *Physically fit*
- *Strong*
- *Energetic*
- *Good nature*
- *Liked by all*
- *Sharp*
- *Good memory*
- *Alert*
- *Updated*
- *Rich*
- *Royal*
- *Like a mother*



*“Everybody in my house loves almonds.”*

*“I imagine seeing a woman who looks 40 years old, but when you speak to her, you realize she is 50 years old, and then you come to know it’s because she eats almonds, she looks young.”*

# Beauty shows opportunity outside of current equities

	Rate claim as “very motivating”	Heavy, 20+ almonds per week	Medium, 7–19 almonds per week	Light, 1–6 almonds per week	Non-participant
Almonds are good for brain development	63%	59%	62%	65%	75%
Almonds are the most nutritious nut	62%	60%	59%	63%	74%
Almonds are good for memory development	62%	61%	62%	63%	72%
The vitamin E in almonds enhances my skin/beauty	60%	57%	61%	60%	71%
Almonds are good for digestive health	60%	60%	60%	58%	68%
Almonds give me the energy to take on my day	60%	62%	60%	57%	68%



5

Rise of  
Healthy Snacking

# Health in India is evolving and impacting the food choices people make

## Protection

- Absence of illness

## Prevention

- Building immunity
- Antiaging

## Performance

- Feeling energetic, active, and sharp

# In addition, consumers include a slew of health strategies for maximum health.

## MORNING RITUALS

Drinking warm lemon/honey water, amla juice, dry fruits, ginger, garlic

Is about cleansing one's body internally

## NEW ROUTINES

Walks, running, going to the gym, yoga, meditation

To become physically and mentally well

## FOOD INCLUSION

Oats, ragi, millets, flax seeds, pumpkin seed, amla, dried turmeric, vitamin tablets, omega-3 supplements, BHAA supplements, protein-rich foods, chavanprash, green tea

Increase fiber and roughage for good digestive health and keep in check the various vitamin levels

## FOOD SUBSTITUTION

Sugar to jaggery, refined oil to olive oil, white bread/rice to brown bread/rice,

Healthier choices

## SEEKING EXPERTISE

Dietitians, gym instructors, nutritionists  
Following Rujuta Diwekers' blogs, Instagram, Facebook pages

Peers/colleagues who have evidently been successful in this journey

## HEALTHY SNACKS

Dhokla, corn, diet mixture, fruit, peanut butter, energy bars, sprouts, milk, protein shakes, boiled chicken, salad, soup

To reduce fat and move toward healthier habits



A close-up photograph of a large quantity of almonds, filling the entire frame. The almonds are light brown with a textured, ribbed surface. Overlaid on the left side is a large, semi-transparent orange circle containing a white number '6'. A thin white circle is also visible, centered on the page and overlapping the almonds.

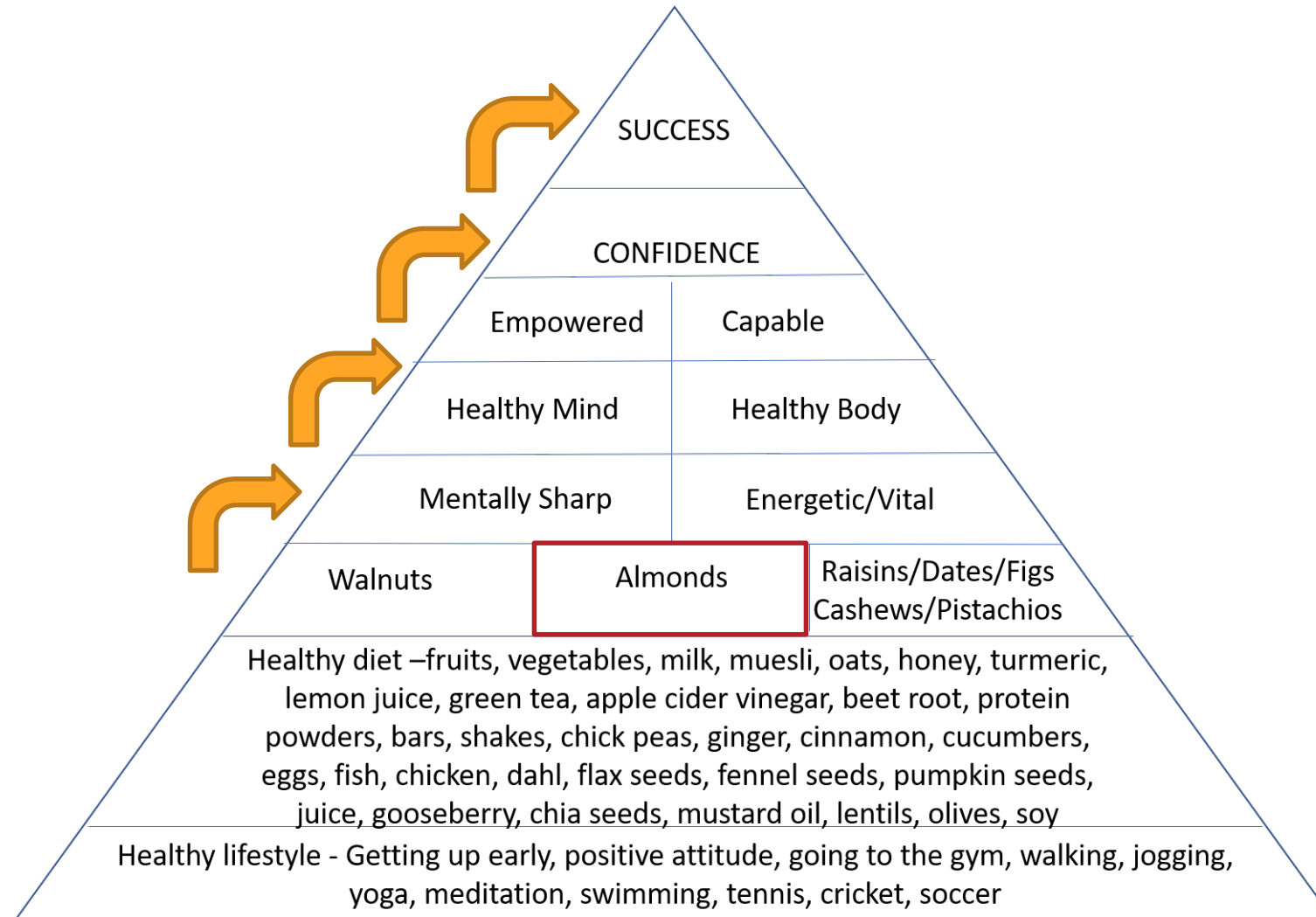
6

**Building on Tradition**

# We must drive the morning ritual to continue growth

	MORNING RITUAL	OTHER MOMENTS
NEEDS	ENERGY & GOOD HEALTH & BRAIN DEVELOPMENT	SNACK/FILLER
MOTHERS	<p>Children do not eat anything early in the morning before going to school. In order to get by until breaktime, mothers give their children almonds with milk.</p> <p>Something nutritious to start the day with and give them energy until their breaktime and helps mental sharpness.</p>	<p>Made available to children (and everyone in the house) as a snack, as part of a larger dry fruit mix</p>
YOUNG WOMEN	<p>Consume it as part of their morning routine, as a dose of goodness before they begin their day.</p>	<p>In the evening, as a healthy nibble, along with evening snacks</p> <p>When travelling long distance, as a filler between meals</p>
YOUNG MEN	<p>Most men eat almonds as a source of energy and protein supplement, pre- or post-workout raw, un-soaked.</p>	<p>As an accompaniment when drinking alcohol</p> <p>As a filler when working late</p>

# And always build on the core driver of “success” and “confidence”



# Approach to Drive Growth has Multiple Strategies

1. New consumers
2. Frequency of the Morning Consumption
3. New Regions in the East
4. Emergence of beauty as the next opportunity
5. Growth of snacking (building new day parts)
6. Reinforcement of traditional benefits



# Agenda

## The Changing Regulatory Landscape

Julie Adams,  
Vice President Global  
Technical, Regulatory &  
Government Affairs, ABC



## Leveraging the Strong Almond Opportunity

Sudarshan Mazumdar,  
Regional Director India/  
South Korea/ Japan, ABC



## Segmentation Study FY 18-19

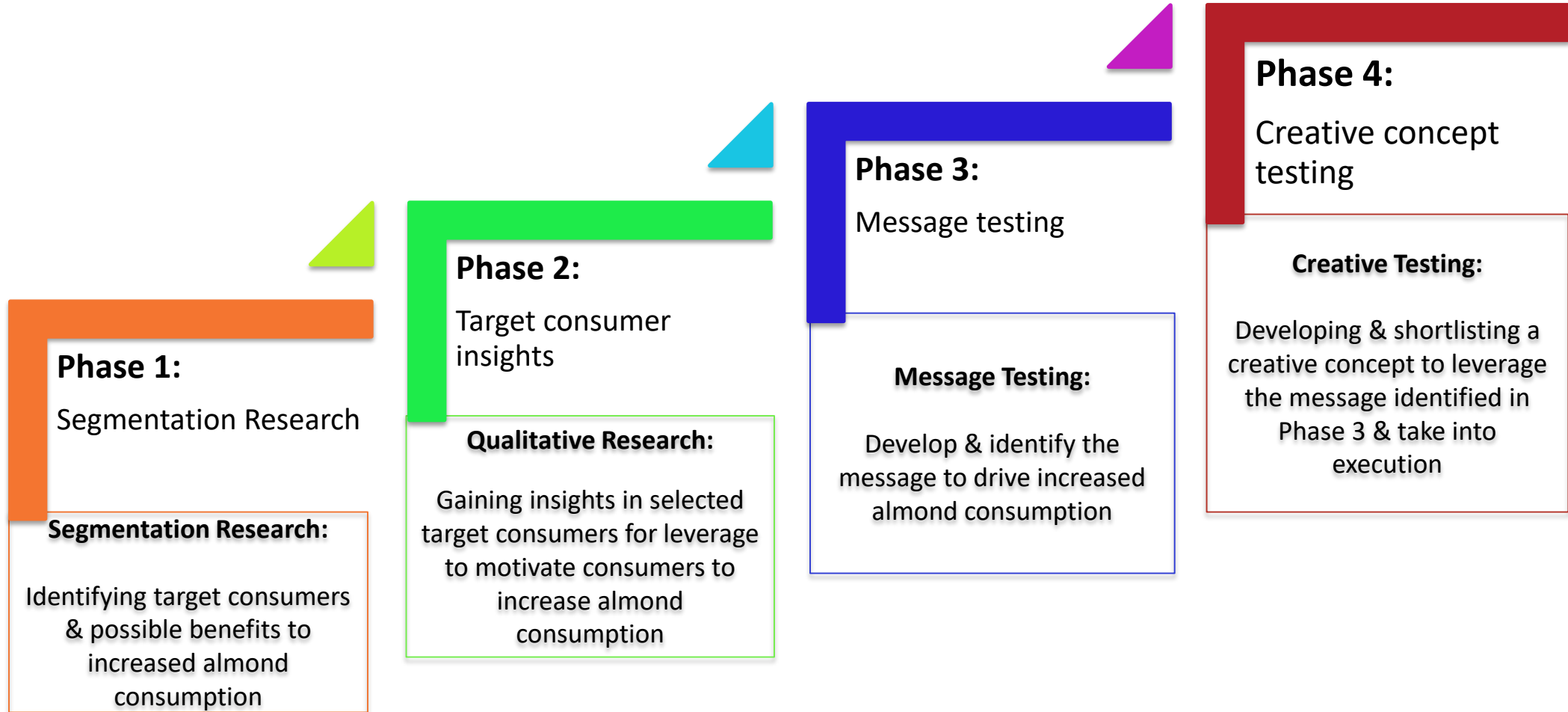
Laurel Muir, Managing  
Partner, SRG



## Building a Stronger Tomorrow

Sudarshan Mazumdar,  
Regional Director India/  
South Korea/ Japan, ABC

# Creative Refresh FY 19-20



## The Winning Proposition



## The Positioning

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

## The Winning Creative Route

### The Idea:

#### ***The Best Dreams are Shared***

*Nothing drives you harder than dreams that you share with your family*





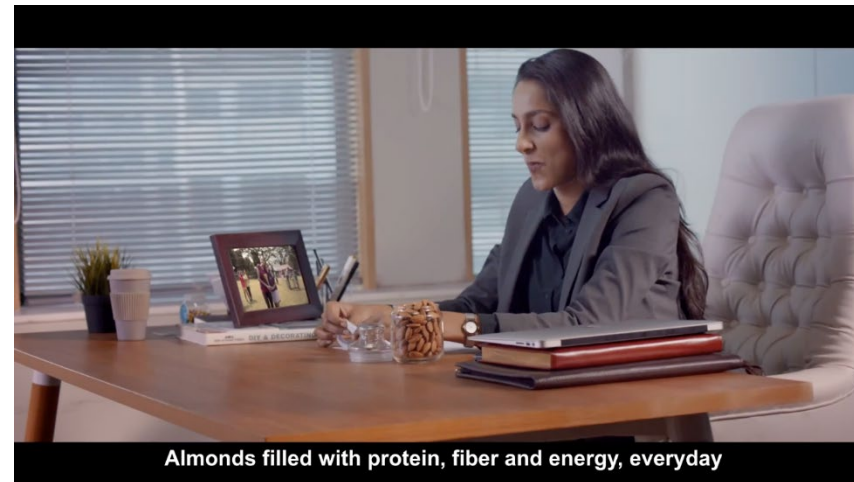
# New Campaign FY 19-20



**Mother Child**



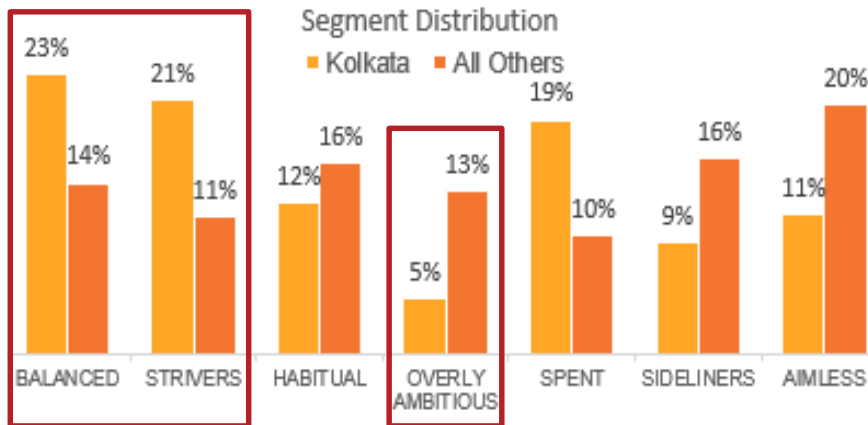
**Working Man**



**Working Woman**

## Expansion to East

- Currently the marketing program is in North, West and South India as these are traditionally heavy almond consumption markets.
- Research showed that 49% of people in the east fall into most health oriented segments. Several almonds messages very motivating to people living in East.



	Kolkata	All Other Regions
Heavy AM occasion	1.9%	15.0%
Medium AM occasion	3.1%	14.6%
Light AM occasion	9.1%	10.8%
Non Participant	24.1%	21.2%
All others	61.8%	38.3%

### Regularly Buy

	Kolkata	All Other Regions
Almonds	31%	89%
Cashews	91%	72%
Raisins	89%	57%
Dates	82%	38%

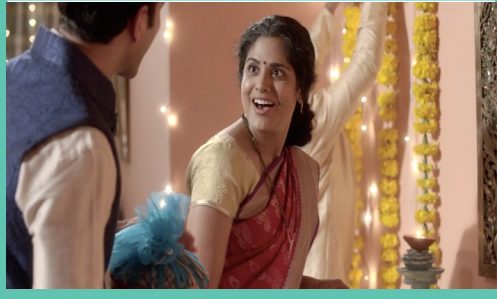
- Familiar: Consumers are eating almonds and enjoyed the almond experience
- Multiple occasions at home and away from home
- Rise of health: Consumers reported increased searching for new health information
- Needs link with almond benefits: Consumer share the desires for both success of their children and themselves. On a daily basis they are looking for energy, skin and hair and mental acuity
- Consumed by the handful: Because portion size isn't currently established, there is an opportunity to drive larger portion sizes (e.g. handful messaging).

# MARKETING PROGRAM

## Family Consumption Campaign



## Festive Campaign

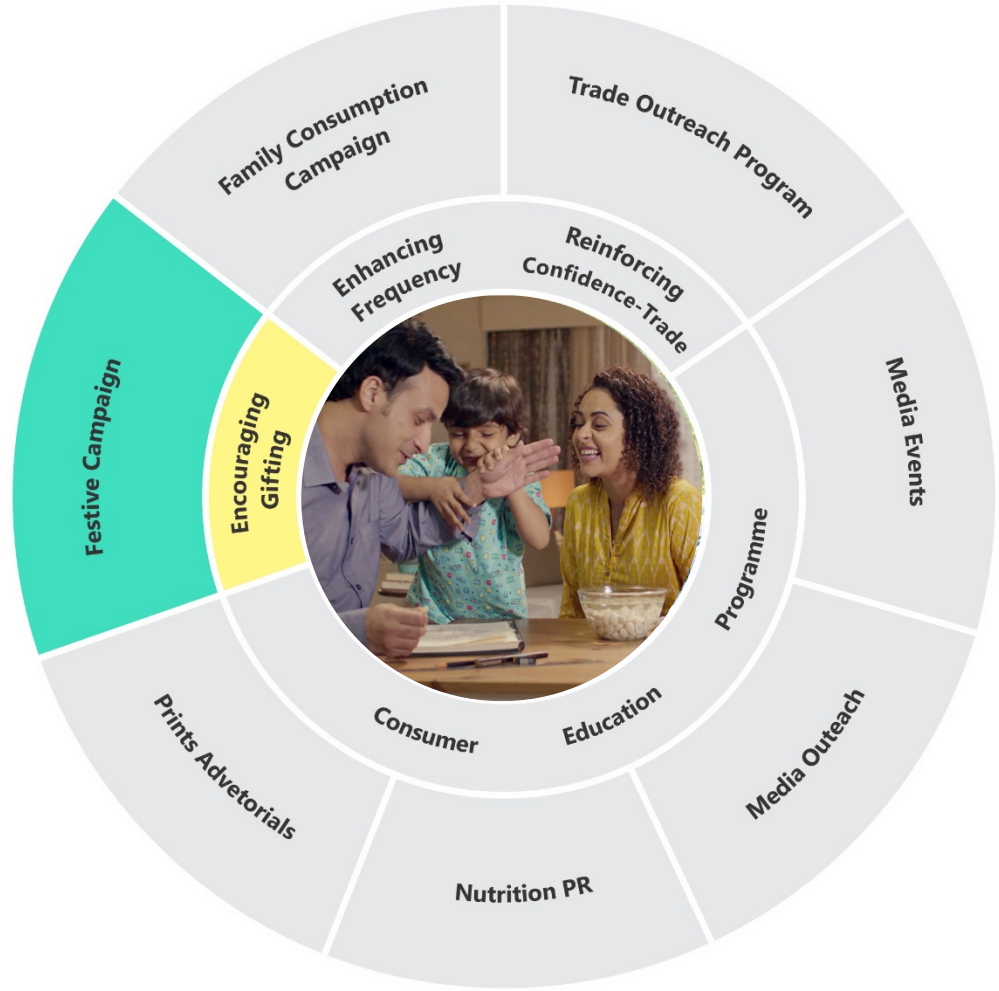


## Print Advertorial

**WHAT COULD HELP YOUR BODY?**  
IF YOU HAVE SUCCESS IN MINDS ALMONDS NATURALLY.

**WHAT CAN HELP, WHEN MOM CAN'T HELP SNACKING?**  
ALMONDS NATURALLY.

**A BUNDLE OF ENERGY FOR YOUR BUNDLE OF JOY.**  
ALMONDS NATURALLY.



## Trade Outreach Program



## Media Events



## Nutrition PR

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

**ALMONDS MAY HELP REDUCE WRINKLES**

महिलाओं को झुर्रियां से बचा सकता है बादाम। बादाम का सेवन करी 100 ग्राम की महिलाओं को केसर की झुर्रियां से बचाने में मददगार हो सकता है। इस अध्ययन में 28 स्वस्थ महिलाओं को शामिल किया गया। 8 हफ्ते तक बाड़ू को 200 ग्राम (340 कैलोरी) के बजट में खाने के लिए।

**ALMONDS MAY HELP REDUCE WRINKLES**

Los Angeles Daily consumption of almonds may help reduce the severity of facial wrinkles in postmenopausal women, claims a first-of-its-kind study to examine the effects of the nuts on skin health.

**ALMONDS MAY HELP REDUCE WRINKLES**

Researchers at the University of California found that a daily snack of either nut-free sticks improved measures of wrinkle width and severity in postmenopausal women.

## Media Outreach

**Why it is important to watch your mouth**

Watching what you eat is essential to your health and helps you reach your health goals.

दिल्ली में खराब आसपास की वायुमय को रोकने के लिए, नए दिल्ली सरकार ने एक अभियान शुरू किया है। यह अभियान 'क्या खाया है' के बारे में लोगों को शिक्षित करने के लिए है।

# Diwali Gifting Campaign

**Positioning:**

Gifting of Almonds honors close relationships

**Campaign Idea:**

The most special relationships are those that are multi faceted



Diwali Massi/ Aunt TVC



Diwali BFF TVC

# MARKETING PROGRAM

## Family Consumption Campaign



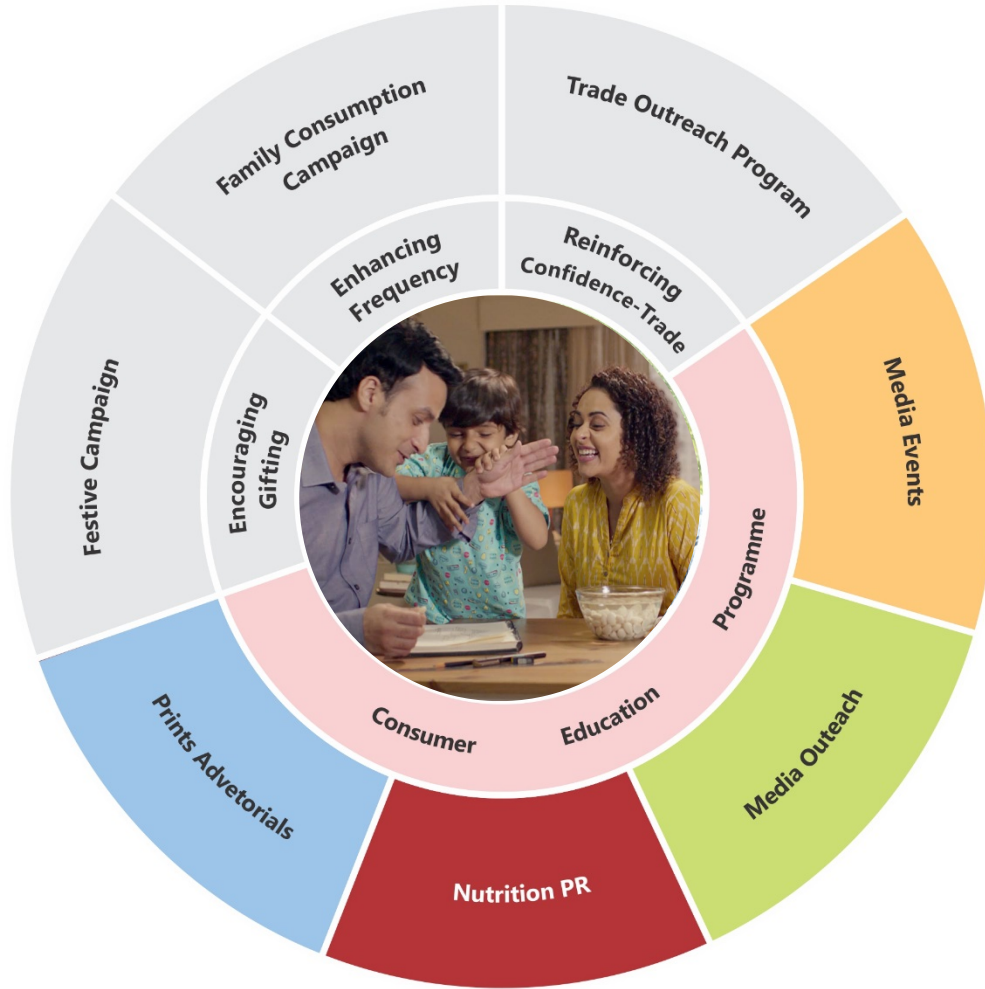
## Festive Campaign



## Print Advertorial

**WHAT CAN HELP, WHEN MOM CAN'T HELP SNACKING? ALMONDS, NATURALLY.**

**FOR YOUR BUNDLE OF JOY, ALMONDS, NATURALLY.**



## Trade Outreach Program



## Media Events



## Nutrition PR

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

**ALMONDS MAY HELP REDUCE WRINKLES**

Los Angeles Daily consumption of almonds may help reduce the severity of facial wrinkles in postmenopausal women, claims a first-of-its-kind study to examine the effects of the nuts on skin health.

Researchers at the University of California, Los Angeles, found that a daily snack of other nut-free snacks improved measures of wrinkle width and severity in postmenopausal women.

The postmenopausal women who ate almonds in the study had experienced 12 percent less wrinkle width and severity than those who did not.

“The postmenopausal women who ate almonds in the study had experienced 12 percent less wrinkle width and severity than those who did not,” says the study’s lead author, Dr. David S. Goldstein, MD, PhD, a professor of dermatology at the University of California, Los Angeles.

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## Media Outreach

**Why it is important to watch your mouth**

Watching your mouth is important for your health and your business. Here are some reasons why.

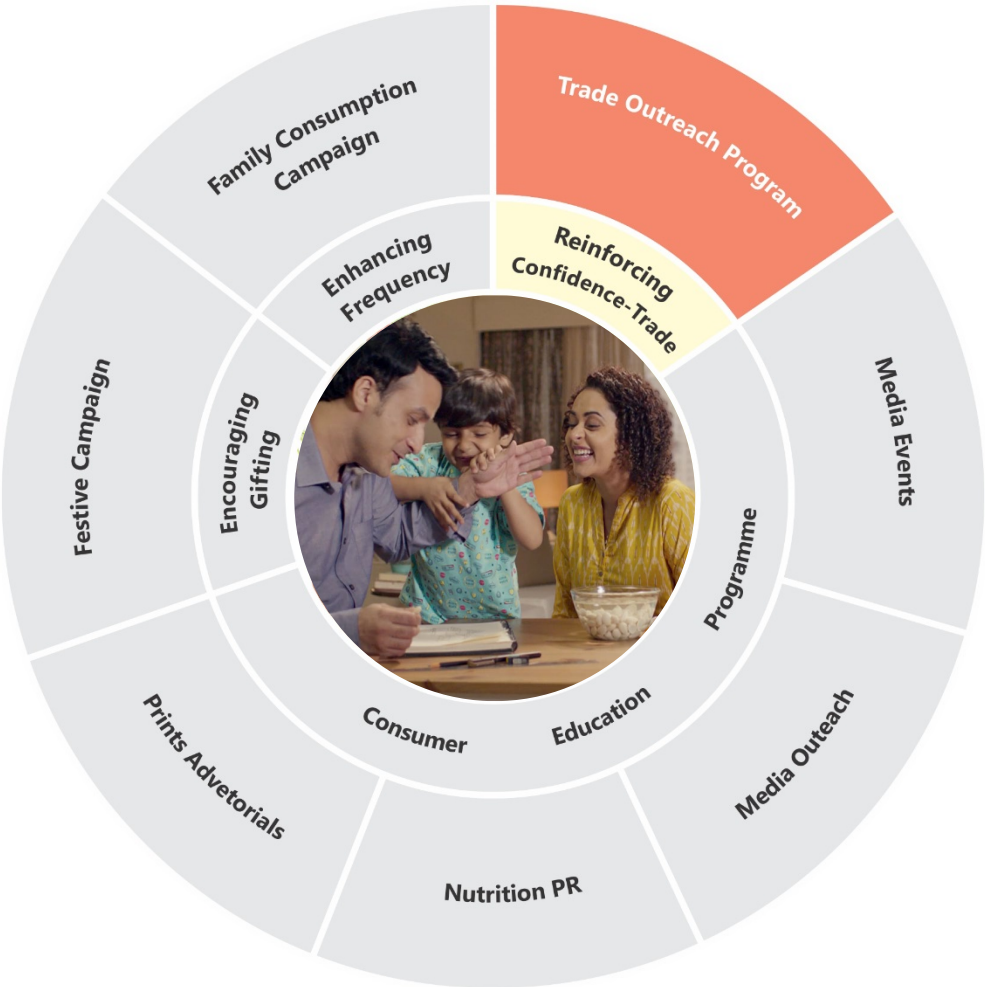
1. It helps you avoid bad habits. Bad habits can be hard to break, but watching your mouth can help you identify and stop them.

2. It helps you avoid bad news. Bad news can be stressful, but watching your mouth can help you avoid it.

3. It helps you avoid bad relationships. Bad relationships can be toxic, but watching your mouth can help you avoid them.

4. It helps you avoid bad outcomes. Bad outcomes can be costly, but watching your mouth can help you avoid them.

# MARKETING PROGRAM



## Family Consumption Campaign



## Festive Campaign



## Trade Outreach Program



## Media Events



## Print Advertorial



## Nutrition PR



## Media Outreach

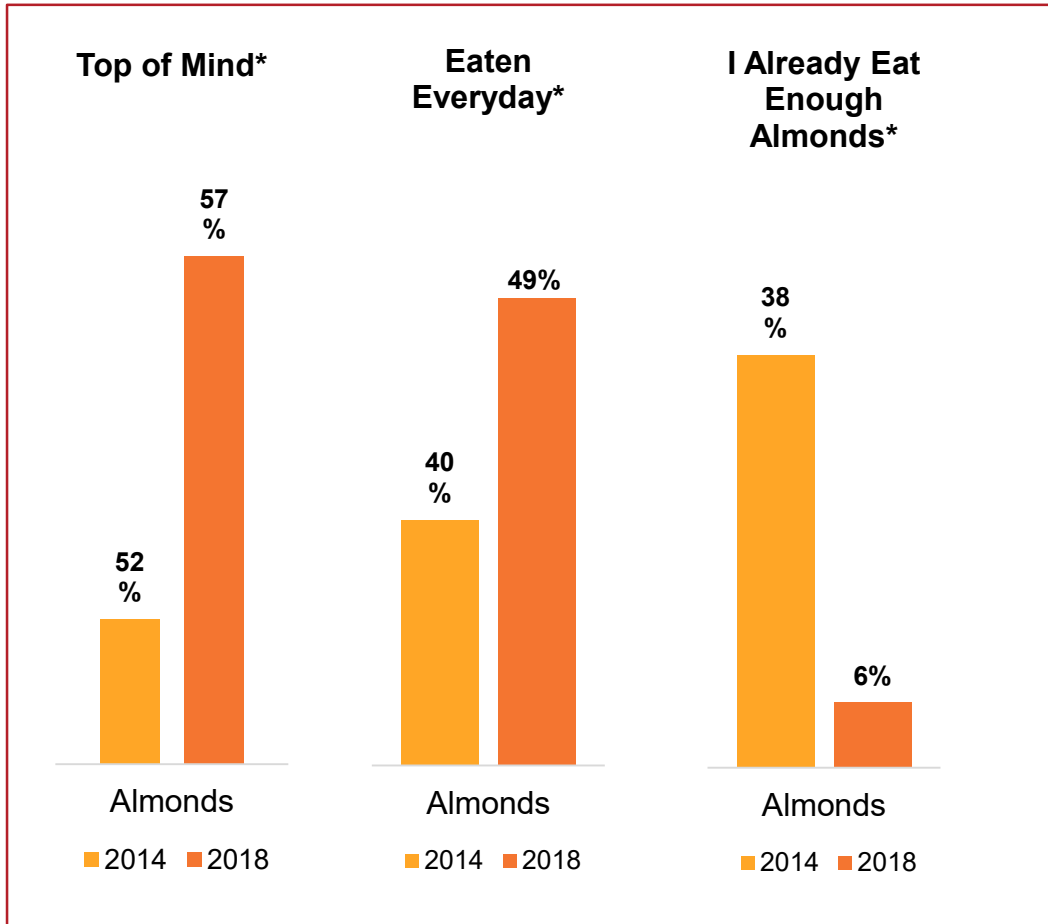


# Strong Program Performance

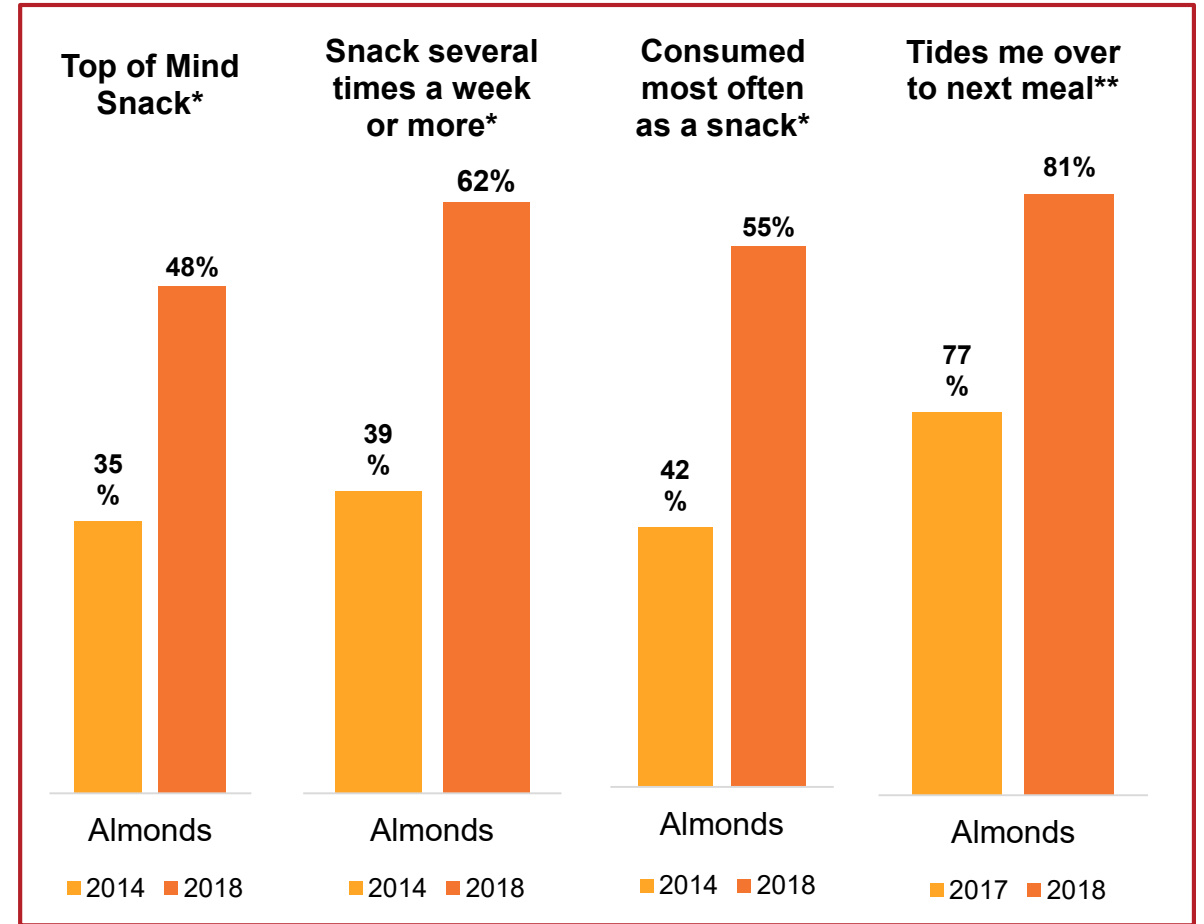


# Gaining Strength on Various Parameters

## Growing Strength of Almonds



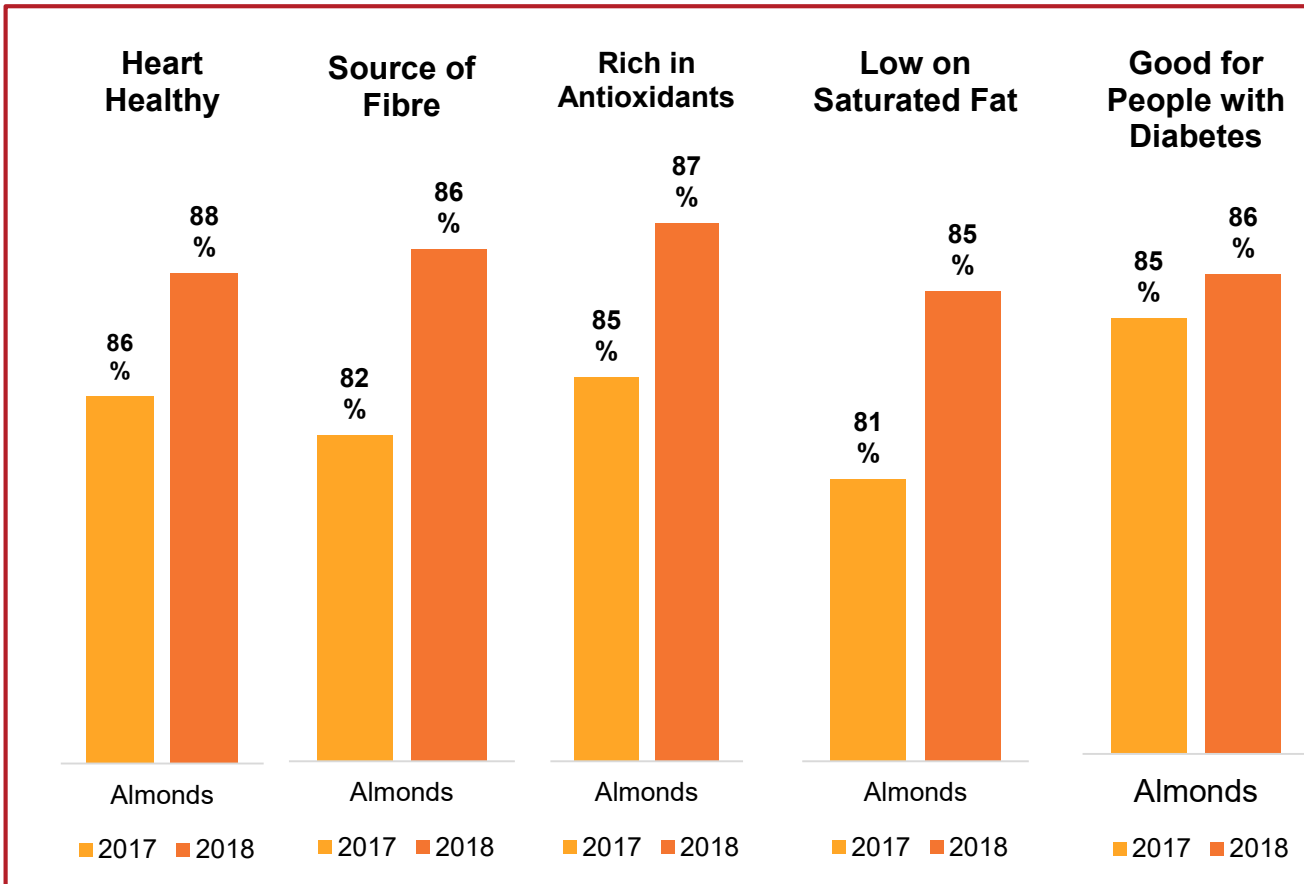
## Growth in Snacking



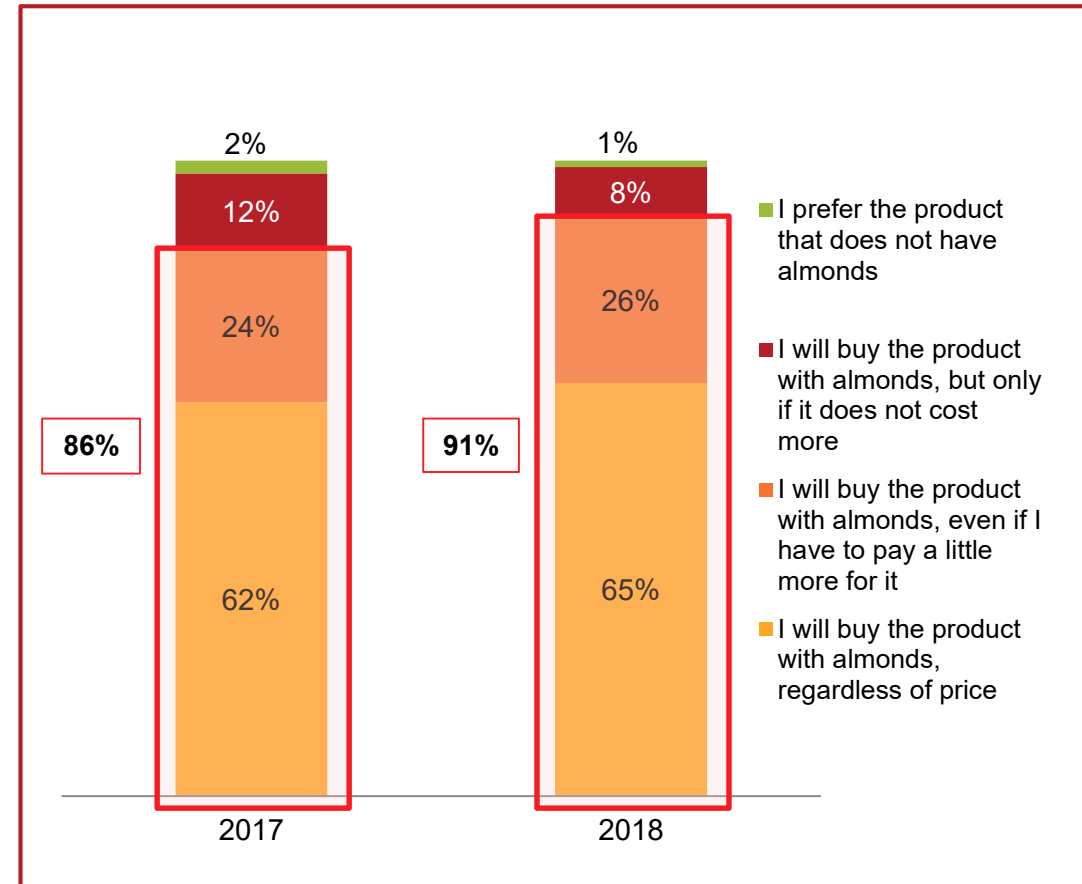


# Gaining Strength on Various Parameters

## Increasing Knowledge of Almond Benefits

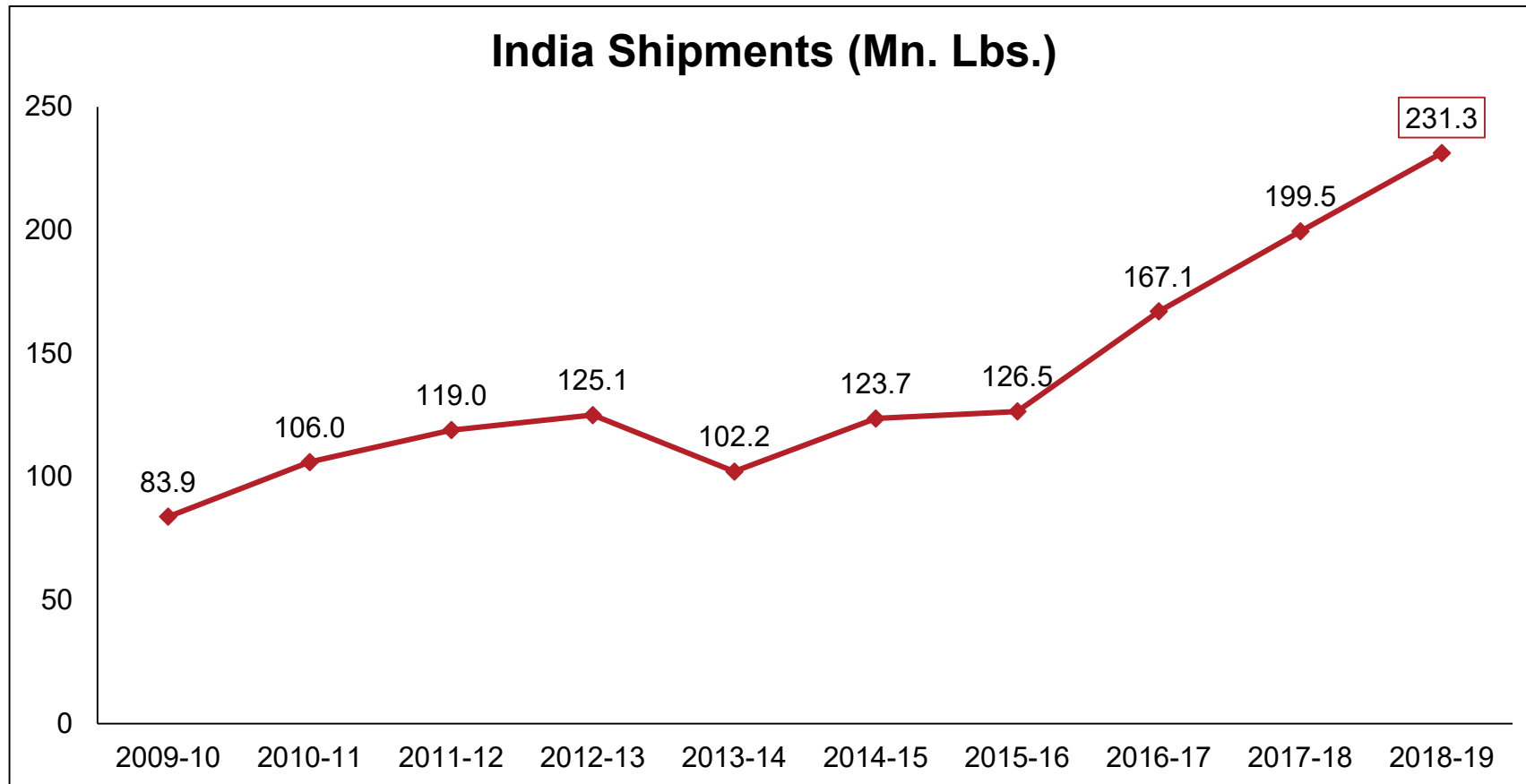


## Willingness to Pay More for Products with Almonds



# India Grew to Become the #1 Export Market in FY 18-19

- Shipments to India surged again to record highs in FY 2018-19 as India overtook Spain to become the largest export market for ABC.



## Key Highlights of the Year Gone By...





# Challenges or Opportunities?

## ➤ **Food Safety**

- Food Adulteration
  - Adding Color to Hide Chip and Scratch
  - Adding Moisture to Increase Sellable Weight
- High Cultural Consumer Trust in Almonds at Risk

## ➤ **Market Evolution**

- Governmental Policies (Demonetization, GST)
  - Increase Transaction Transparency (Leveling the Playing Field, But Increasing Costs)
  - Market Disruption, Moving From Grey to White
- Growth Demands Capital (107M lbs. Growth Over 5-years Requires Approx. \$300M)

## ➤ **Almond Consumption Evolution**

- Almonds 2<sup>nd</sup> Largest Nut Import Into India (Cashews #1 at 550M Lbs.)
- 80-85% of Imported Almonds are Consumed as is, While 40% of Cashews are Consumed as is
  - Large Opportunity for Consumption Growth in Almonds as an Ingredient for Further Processing

## ➤ **Biggest Bang for the ABC Buck**

- Promotion and Advertising is Cheap as Compared to Other Countries
- Our Program is Working!



# India Tomorrow

- ▶ Fastest Growing Market in the World With the Greatest Future Potential
- ▶ World's Largest Youth Population
  - ▶ They Have Embraced the Cultural Trust of Almonds

The Best is Yet to Come For India



A close-up photograph of almonds. A clear glass bowl is tilted on the right side, pouring almonds onto a dark wooden surface. The almonds are light brown with a textured, ribbed appearance. The background is softly blurred, focusing attention on the almonds in the foreground and the bowl.

**Questions?**



*the Almond*  
**CONFERENCE**  
2019

**India: Strong Today,  
Stronger Tomorrow**

 **california  
almonds**<sup>®</sup>  
Almond Board of California

# Upcoming Sessions at 3:30 p.m.

- Incentive Assistance: Help Applying for Grants that Fund On-Farm Practices (Room 1)
- South Korea and Japan: Almonds Make Life Beautiful (Room 2)
- Pest Management Considerations in an Ever-Changing Regulatory Environment (Room 3)





# Visit the Exhibit Halls and Participate in the Passport Game

• 3P Partners	#2206	• K•Coe Isom	#707
• ABC Booth	#526	• Lincoln Agribusiness Services	#733
• AC Horn	#421	• Napasol	#2205
• Ag Spray Equipment	#2203	• NETZSCH Premier Technologies	#218
• Bayer CropScience	#127	• Satake	#521
• Best Drayage	#2112	• Suterra, LLC	#1638
• Bird Gard, LLC	#1812	• TOMRA Sorting Solutions	#335
• Borrell USA	#327	• Trécé, Inc	#516
• Cablevey Conveyors	#217	• Valent U.S.A.	#621
• Central Life Sciences	#917	• Westbridge Agricultural Products	#1534
• JAX, Inc.	#413	• Wilkey Industries	#320
• JKB Energy	#635	• Yara North America	#627

The first 500 attendees to turn in a completed passport card to the ABC booth (#526) will receive a hat and will be entered to win one of seven amazing prizes!



# Research Poster Session

Wednesday, 4:30 – 6:00 p.m.

Pavilion & Building D

## Featured topics:

- Soil Quality (e.g., Cover Crops, Composts, Whole Orchard Recycling)
- Pest Management
- Irrigation Management
- Biomass/Co-Products
- Almond Leadership Special Projects (Building D)





# Shuttle Schedule

Shuttle service will be provided by The Almond Conference from the downtown hotels to Cal Expo daily.

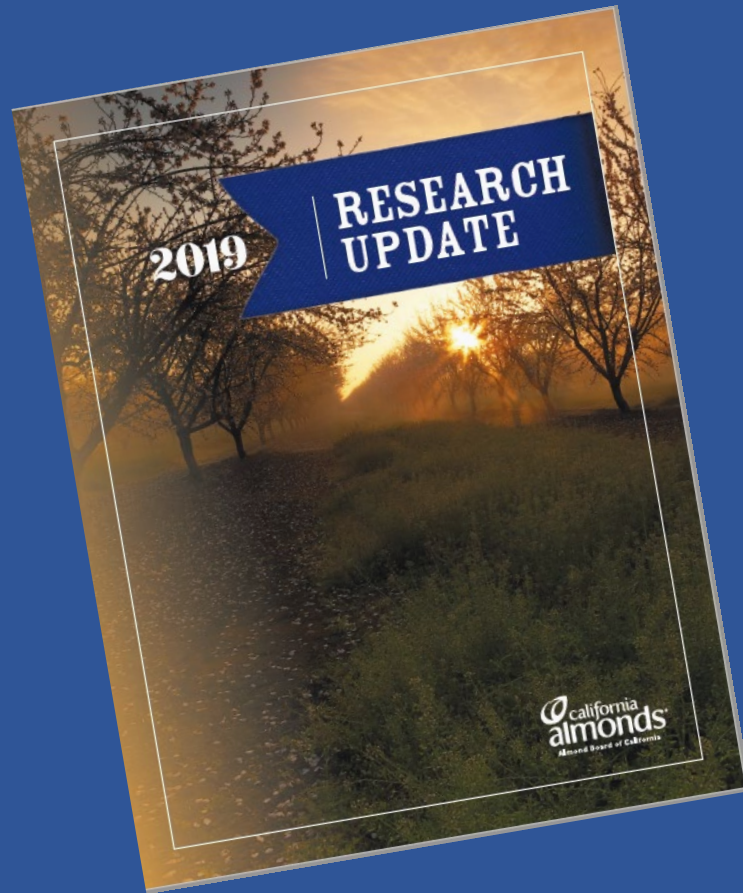
- Downtown Pickup Location: Hyatt Sacramento Front Drive
- Cal Expo Pickup and Drop-Off Location: Blue Gate

## Shuttle Schedule:

- Tuesday, Dec. 10
  - 6:45 a.m. – 6:30 p.m.
- Wednesday, Dec. 11
  - 6:45 a.m. – 6:30 p.m.
- Thursday, Dec. 12
  - 6:45 a.m. – 1:30 p.m.

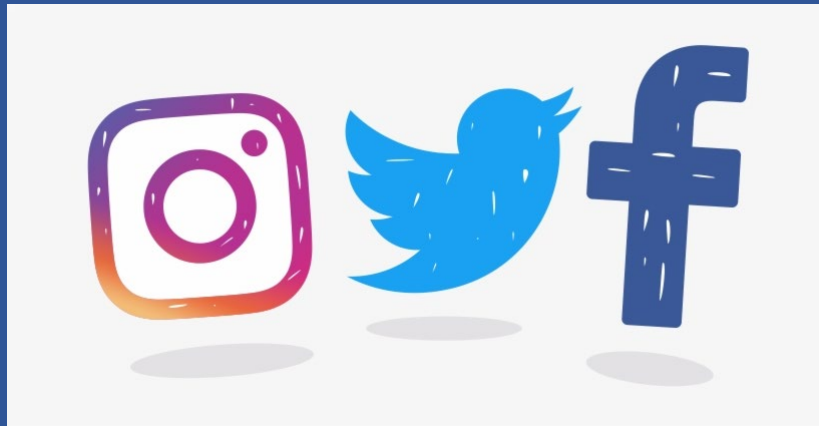


# 2019 Research Update



Pick up a  
copy at the  
ABC booth  
#526

# Join the Conversation!



Use **#AlmondConf** to share highlights  
from The Almond Conference

# Dedicated Trade Show Time

4:30 p.m. – 6:00 p.m.

**Social Reception Sponsored by:**





# 10 YEARS OF PROGRESS

JOIN THE JOURNEY

It's all there at

[SustainableAlmondGrowing.org](https://SustainableAlmondGrowing.org)



# Join Tonight's Social Reception

## Come and Sample: ALMOND BROWN ALE

### Stop by:

The Almond Board Lounge in Building D.

### Sample:

Almond brown ale during the Tuesday and Wednesday receptions.

This almond beverage is the result of a special project from Dominique Camou and Lucas Schmidt in collaboration with **Tembler Brewing Company**.

Industry members and attendees are welcome to stop by and have a taste.

### When:

Tuesday and Wednesday evening reception from 4:30–6:00 p.m.



**4:30 p.m. – 6:00 p.m. - Pavilion + Building D**

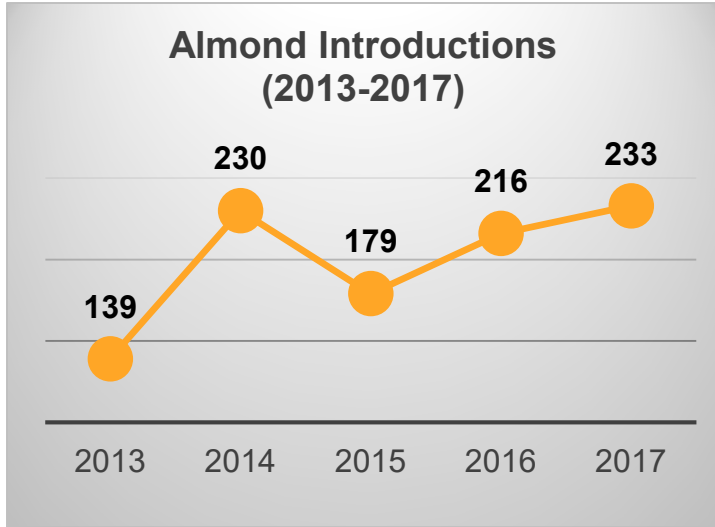


**Thank you!**



## Appendix

# Almond Introductions in India



Unibic Choconutty Nuts Snack Bar with Almonds, Cashews and Pistachios



Yoga Bar Almond fudge



Kellogg's Almonds and Nuts Snack Bar



Kellogg's Crunchy Granola With Almonds And Cranberries



Kellogg's Real Thandai Badam Cornflakes



Kellogg's Real Rose Badam Cornflakes

Snack Bars

Cornflakes



Unibic Fruit and Nut Cookies



Britannia Nutrichoice Oats, Chocolate and Almond



Hershey Kisses Milk Chocolate with Almond



Snickers Almond

Chocolate



Second Nature Almond, cocoa, dates milk



Raw Pressery Almond milk

Almond Milk



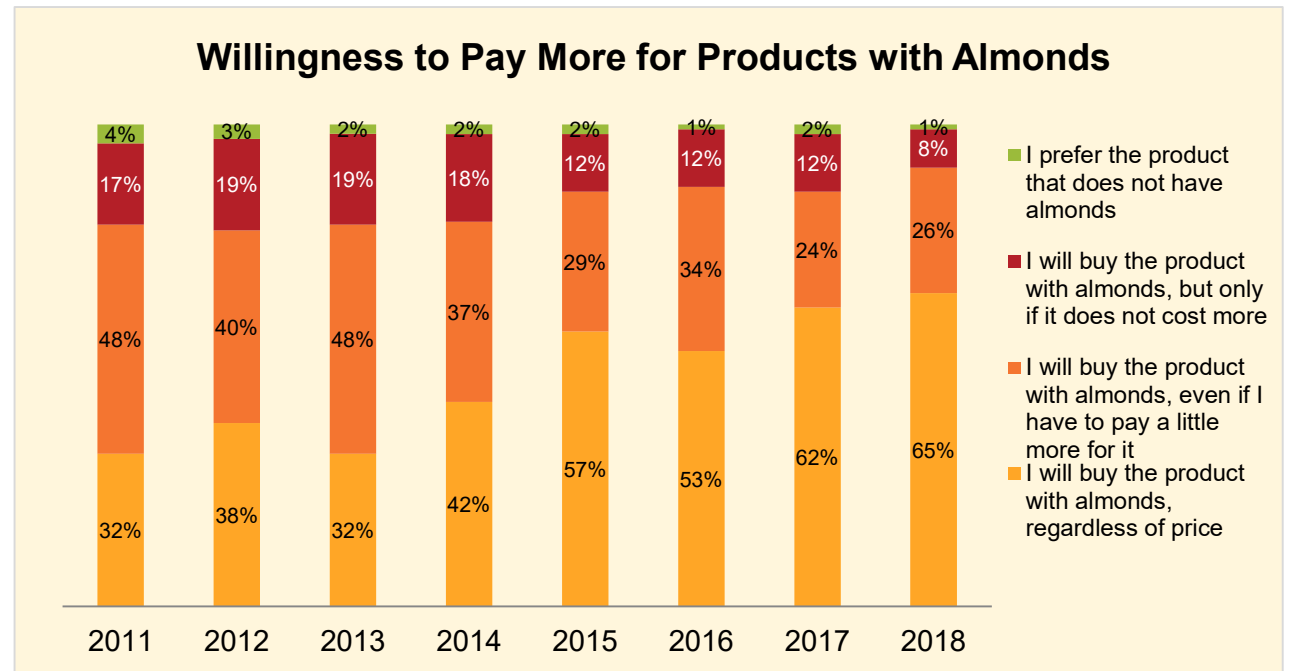
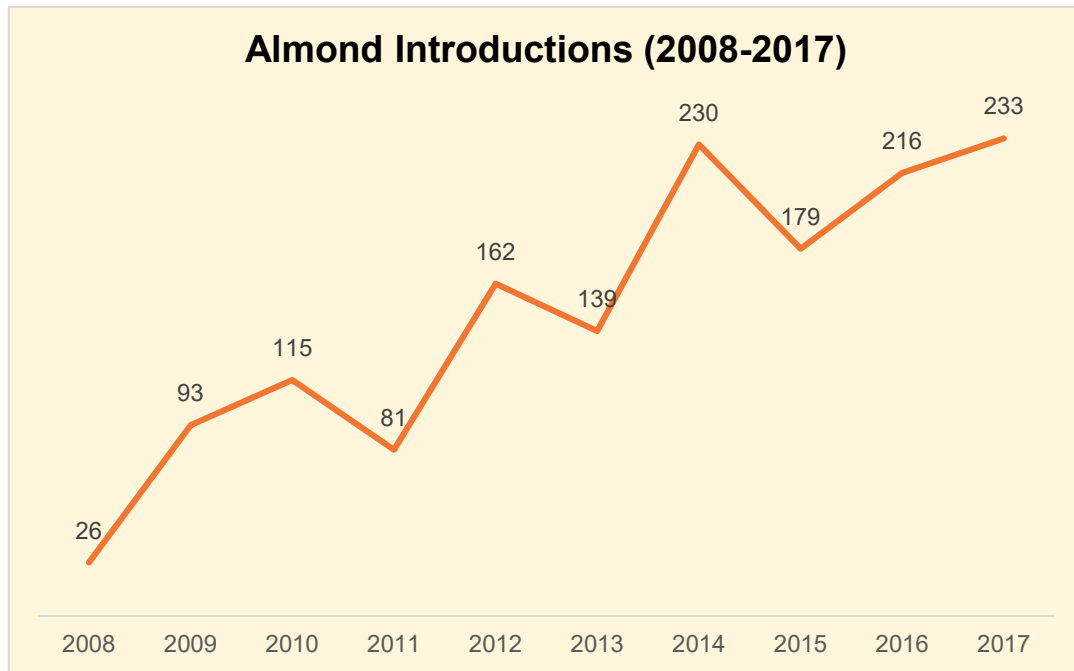
Alpino Almond Butter



Grow Fit Almond Flour

Misc

# Opportunity for Increased Almond Introductions with Growing Health Consciousness



# Reinforcing Tradition of Gifting Almonds During the Festival of Diwali

## Why Almonds Are a Good Gift to Be Given

A healthy food  
Not adulterated  
Says I care  
A premium offering showing my status  
True to tradition  
Easily customizable

## Why Almonds Are a Good Gift to Receive

Feels cared for  
Long shelf life, regular household consumption  
Premium offering showing my status  
Not adulterated  
High acceptance because of tradition

**Gifting of Almonds Honors Close Relationships**

Among all people in our target who give gifts during festivals, 11.9% gift dry fruits.

Movement away from gifting sweets as they are unhealthy, prone to adulteration, too common to show status

# India Versus The World

## Major Markets For California Almonds

Fig. 1

Shipments (In Million lbs.)						
	2014	2015	2016	2017	2018	5-Year Change
<b>India</b>	<b>123,685</b>	<b>126,451</b>	<b>167,075</b>	<b>199,517</b>	<b>231,347</b>	<b>107,662</b>
North America	694,778	655,266	749,935	816,205	825,236	130,458
Western Europe	468,041	523,312	566,450	583,036	572,648	104,607
Middle East	171,870	139,367	173,591	164,279	167,915	(3,955)
Greater China	157,699	177,076	205,584	240,538	206,623	48,924



Fig. 2

Growth in Shipments						
	2014	2015	2016	2017	2018	5-Year Avg
<b>India</b>	<b>21.00%</b>	<b>2.24%</b>	<b>32.13%</b>	<b>19.42%</b>	<b>15.95%</b>	<b>18.15%</b>
North America	-0.34%	-5.69%	14.45%	8.84%	1.11%	3.67%
Western Europe	-12.00%	11.81%	8.24%	2.93%	-1.78%	1.84%
Middle East	-4.00%	-18.91%	24.56%	-5.36%	2.21%	-0.30%
Greater China	-10.13%	12.29%	16.10%	17.00%	-14.10%	4.23%



Fig. 3

Percent of Crop						
	2014	2015	2016	2017	2018	5-Year Avg
<b>India</b>	<b>6.83%</b>	<b>6.98%</b>	<b>7.96%</b>	<b>8.86%</b>	<b>10.21%</b>	<b>8.17%</b>
North America	38.34%	36.18%	35.71%	36.26%	36.43%	36.59%
Western Europe	25.83%	28.90%	26.97%	25.90%	25.28%	26.58%
Middle East	9.49%	7.70%	8.27%	7.30%	7.41%	8.03%
Greater China	8.70%	9.78%	9.79%	10.69%	9.12%	9.62%