



2017

THE ALMOND CONFERENCE

INDIA: CELEBRATING TRADITIONS

Room 306-307 | December 7 2017



CEUs – New Process

Certified Crop Advisor (CCA)

- Sign in and out of each session you attend.
- Pickup verification sheet at conclusion of each session.
- *Repeat this process for each session, and each day you wish to receive credits.*

Pest Control Advisor (PCA), Qualified Applicator (QA), Private Applicator (PA)

- Pickup scantron at the start of the day at first session you attend; complete form.
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Sign in sheets and verification sheets are located at the back of each session room.

Agenda

1. India, The Growing Economic Powerhouse

- Sudarshan Mazumdar, Regional Director, India
Almond Board of California

2. The Changing Regulatory Landscape

- Julie Adams, Vice President, Global Technical & Regulatory Affairs,
Almond Board of California

3. Leveraging Ancient Wisdom

- Dr. Swati Kalgaonkar, Senior Manager, Nutrition Research Program,
Almond Board of California

4. Leveraging Traditions for Market Growth

- Sudarshan Mazumdar, Regional Director, India
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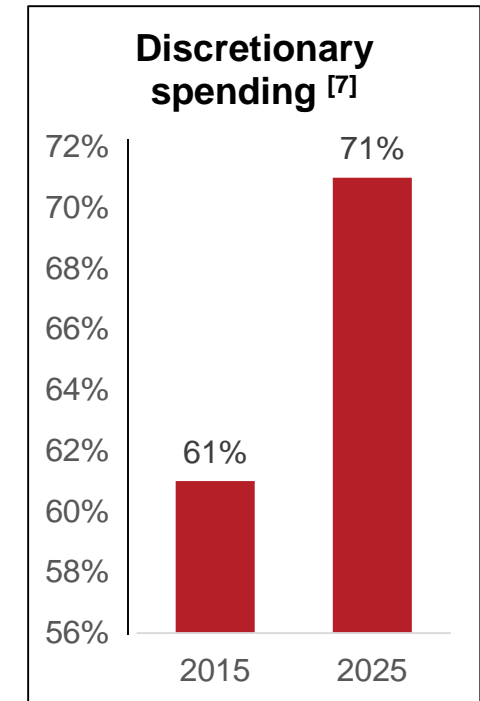
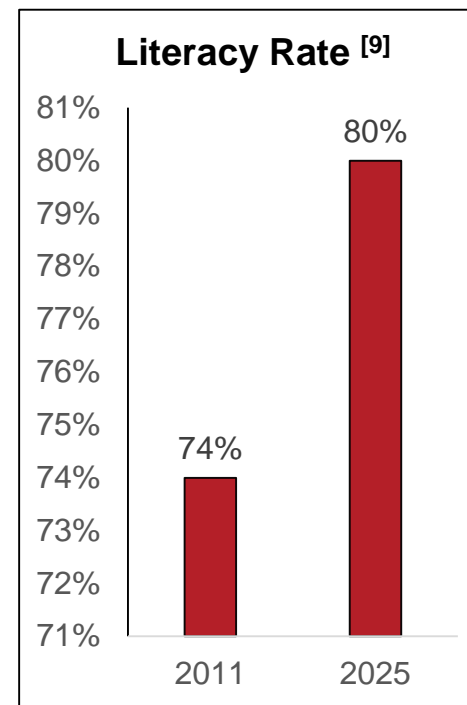
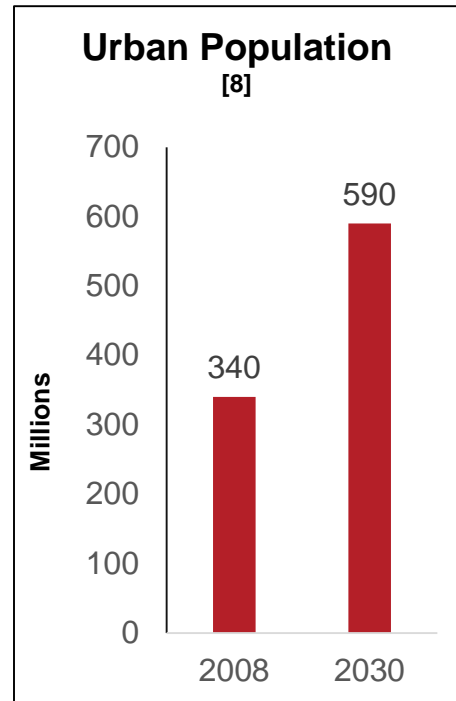
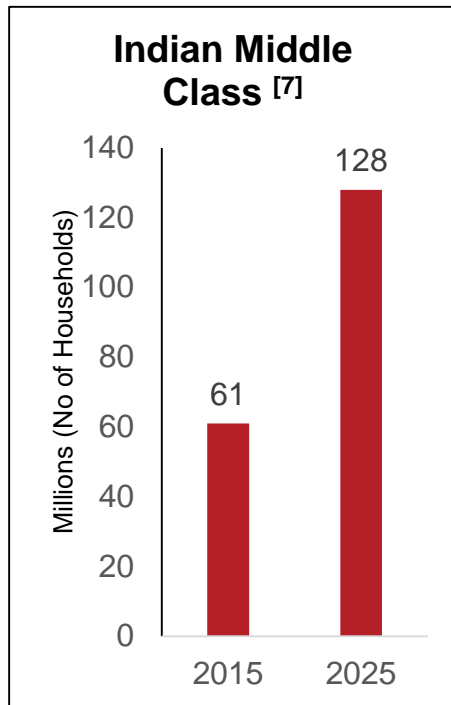
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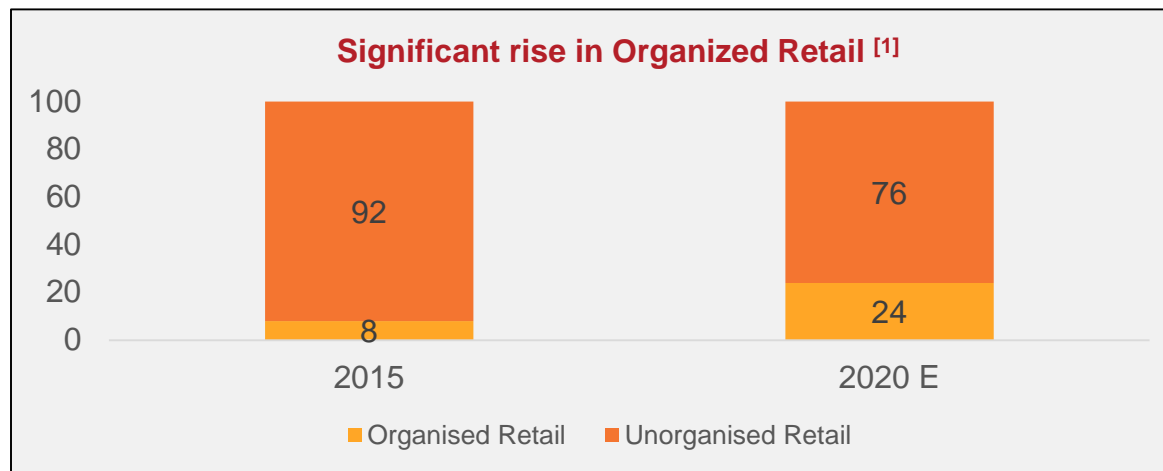
India : Large Growing Economy With Strong Fundamentals

- India GDP at USD 2.3 tn, growing at 6.7% [1]. Expected to be the 3rd largest economy by 2030 [2].
- 1.32 Billion population[4], growing at 1.2% [1]. 65% under the age of 35 [5].



Strong Economic Growth Fueling Retail Sector Growth

- Retail grew from US\$ 425 billion (2010) to US\$ 600 billion (2015). Expected to grow to US\$ 1.3 trillion (2020).^[1]
 - Organized Retail to grow from 8% (US\$48 Bn) in 2015 to 24% (US\$312 Bn) by 2020.^[1]



Retail Category ^[1]	Category Share (% of Total Market Share)	Organized Retail Penetration
Food & Beverage	69 -70	2-3
Clothing & Textiles	11-13	17-20
Consumer Durables	4-5	15-20
Home Décor & Furnishing	3	5-6
Beauty, Personal Care	8-11	6-10
Footwear	2	16-17
Others	3-4	9-30

And This Growth Story is Expected Across Sectors



2.2X
Foreign Tourist Arrivals. 0.7 Mn (2015) to 1.53 Mn (2025)

Tourism & Hospitality [1]



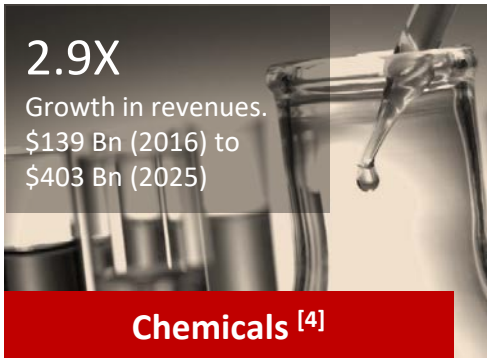
2.3X
Growth in smartphones. 102.4 Mn (2016) to 231.5 Mn (2021)

Smartphone [2]



1.9X
Growth in M&E revenues. \$19.7 Bn (2016) to \$37.7 Bn (2019)

Media & Entertainment Market [3]



2.9X
Growth in revenues. \$139 Bn (2016) to \$403 Bn (2025)

Chemicals [4]



3X
Growth in revenues. \$32 Bn (2016) to \$96 Bn (2026)

Capital Goods [5]



2.7X
Growth in revenues. \$154 Bn (2016) to \$350 Bn (2025)

IT Industry [6]



3.3X
Growth in Passenger cars. 2.8 Mn (2016) to 9.4 Mn (2026)

Car Market [7]

Government Playing an Active Role in Growth

- **Strong Fiscal Discipline:** Fiscal deficit down from 6.6% (2009) to 3.5% (2016)^[1]. Government resolved to meet 3.2% deficit target ^[2].
- **Consumer Price Inflation:** Down from 13% (2009) to 3.6% (2017 October) ^[1].
- **Tax Reform:** Goods and Services Tax introduced.
- **Crackdown on Black Money & Corruption:** Rs.500 and Rs.1000 notes demonetized ^[3].

Demonetization Facts	India	UK	US	China
Total Amount of Cash In Economy (USD Bn -2016)	270	94	1,480	N/A
GDP (2016)(USD bn)	2,251	2,650	18,562	11,392
% Share of Cash to GDP	12%	4%	8%	-
Share of Highest Denomination of Currency to Per Capita Income (2015)	1.07%	0.30%	0.18%	0.10%

MAKE IN INDIA

Simplification of Taxes

100 Smart Cities
USD 7.53 bn

Single Window
e-clearance Portal

Roads and
Transportation
23 kms roads added
daily

**EASE OF
DOING
BUSINESS**
India jumps 30
places in 2017

**GOODS &
SERVICES TAX**

DIGITAL INDIA

Jan Dhan Yojana

Rail Network
USD 137 bn investment

Bullet Train
USD 17 bn investment

FDI
\$60 bn in 16-17 (11% CAGR)
100% in Construction,
74% in Defence and 49% in
Insurance

Growing International Confidence in India

“We believe that the country is for the medium and long-term on a growth track that is much more solid as a result of the structural reforms that have been conducted in the last couple of years”

- IMF Chief, Lagarde

“India climbs to 8th spot on FDI confidence Index”

***- Kearney Foreign Direct Investment (FDI)
Confidence Index***

“We remain overweight on India as the medium term growth and reform story remains promising. Plans to invest \$1 billion in India in 3-4 years”

- Goldman Sachs

“India remains the fastest growing economy in the world – economic fundamentals are strong, and reform momentum continues”

- World Bank

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Regulations and Reality – Not Always Predictable!

TODAY.....

- Bulk Labelling
- No Objection Certificate (NOC)
- Goods & Services Tax (GST)
- Almond Standards

TOMORROW.....



Are we *Finally Done* with Labelling??

- Confusion over “bulk” vs “pre-packaged” labeling requirements
- Clarified last year, but emerged again with new labeling regulations
- FSSAI confirmed in October that there is *no change*
- New Manual for Food Import Clearance System (FICS) has been developed to facilitate imports, reduce inconsistencies
 - <http://www.fssai.gov.in/home/imports/Manuals.html> (08.11.2017).

Status:

- Continuing to build FSSAI relationship
- Capacity-building project under discussion to bring FSSAI health authorities to U.S.

October 7, 2016

INDIA FSSAI LABELLING REQUIREMENTS

Food Safety & Standards Authority of India (FSSAI) regulations have specific provisions for labeling foods moving in to retail channels. FSSAI issued a notification dated August 2016 modifying earlier guidelines. The notification confirms that **dry fruits** (which includes almonds) are considered a **primary food**; these are almonds which are imported in packaging that are **not meant for direct sale** in the market (e.g. subject to shelling, repacking into consumer packages, roasted, etc.)



The mandatory labeling elements that must be included are shown below.

Reference Notification	Category	Mandatory labeling on Bag/Carton
F.No. 1-17/FSSAI/T/2010 (Part J) dated 23.03.2012; modified by F. No.1-1570/FSSAI/Imports/2015 dated August 2016	Primary food like food grains, pulses, fruits, dry fruits, whole spices, etc. imported in package	<ol style="list-style-type: none"> 1. Name of Food 2. Name & complete Address of the packer 3. Date of packing 4. Name & address of importer (and FSSAI License number) can be verified from accompanying documents of the consignment
	May be included on Bag/Carton but NOT Mandatory	<ol style="list-style-type: none"> 1. Net Weight 2. Lot no/Code no/Batch no. 3. Best before or use by date or date of expiry
	NOT REQUIRED	<ol style="list-style-type: none"> 1. Vegetarian logo  2. FSSAI logo

This information has been reviewed with FSSAI to ensure it is an appropriate interpretation of requirements. For more information, please contact Julie Adams (jadams@almondboard.com).

GST – How are Almonds Positioned?

- *Multiple* GST rates for Almonds, other nuts
- Almonds rated 0% (“fresh”) and 12% (“dried”)
 - *But no definition of “fresh”*
- Previously, only three “nut” commodities (all grown in India) were listed at 5%
 - Peanuts
 - Cashews
 - Areca (Betel) nut
- Last GST Council meeting reduced Walnuts as well to 5% based on local industry request

Status:

- Representations made to Indian authorities
- Trade implications, ease of doing business, food processing facilitation

REVISED GST RATES APPLICABLE TO NUTS

September 19, 2017

Commodity	Commodity Description under GST	Tariff Heading	GST Rates
Almonds	Other nuts, fresh ² 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 ³	Cashew nuts, whether or not shelled or peeled	0801	5% ⁴
Coconuts	Coconuts, fresh or dried , whether or not shelled or peeled	0801	Nil
Brazil nuts	Brazil nuts, fresh , whether or not shelled or peeled	0801	Nil
	Brazil nuts, dried , whether or not shelled or peeled	0801	12%
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% ⁵

NOC's – Gone but Not Forgotten.....Or Not?

- Efforts to address NOC at government-to-government level unsuccessful
- NOC is a procedural requirement laid down by Customs in Nhava Sheva – not a requirement under any import regulations or Notices/Circulars from Central Board of Excise and Customs
- Legal requirement under Customs Act is that BOE shall be presented *before end of next day following day of arrival* of vessel
- Opportunity to find solution given focus on ease of doing business, regulatory reforms

Status:

- Representations made to Indian authorities
- Focus on administrative/procedural change versus change in law or regulation



Almond Standards – Up for Consideration

- FSSAI published draft standards for a number of commodities, **including Almond Kernels** this month (60 day public comment period)
- Standards largely based on U.S. and UN/ECE grades
- Nothing circulated/drafted related to inshell

S. no.	Characteristics	Requirements	
(i)	Moisture (m/m), %	Not more than 6.0	
(ii)	Inshell almonds, shell or skin fragments, (m/m), %	Not more than 0.25	Total tolerance Not more than 12.0
(iii)	Rancid, rotten and damaged by insects or other pests (m/m), %	Not more than 1.0	
(iv)	Gummy and brown spot (m/m), %	Not more than 2.0	
(v)	Blemishes and discoloration(m/m), %	Not more than 4.0	
(vi)	Shrunken or shrivelled and not sufficiently developed kernels(m/m), %	Not more than 4.0	
(vii)	Bitter almonds(m/m), %	Not more than 2.0	
(viii)	Split, broken and halves (m/m), %	Not more than 5.0	
(ix)	Chipped and scratched (m/m), %	Not more than 10.0	
(x)	Doubles or twins (m/m), %	Not more than 10.0	
(xi)	Acid insoluble ash in dil.HCl, %	Not more than 0.1	
(xii)	Oil content (m/m), %	Not less than 45.0	

Status:

- Review underway; circulated to industry members for input
- Comments due mid-January

We *Really Do* Have an Opportunity Moving Forward.....

TOMORROW.....



- Good relationships established with key authorities
- Almond Board viewed as a long-term partner looking for solutions
- Broader government strategies/policies presents an environment that *can be leveraged*:
 - Department of Industrial Policy and Promotion (DIPP) recommendations for reforms on regulatory processes, policies, practices and procedures spread across different areas.
 - Opportunity to raise issues that impact **Ease of Doing Business**
 - Ministry of Food Processing focused on **Make in India** campaign
 - Adopting an ***In India, For India*** philosophy is KEY: finding the win-win!

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Leveraging Ancient Wisdom

Dr. Swati Kalgaonkar
Senior Manager, Nutrition Research Program

Agenda

- What is Ayurveda?
- Principles of Ayurveda
- Why Ayurveda?
- Ayurveda: Almond health benefits



What is Ayurveda?

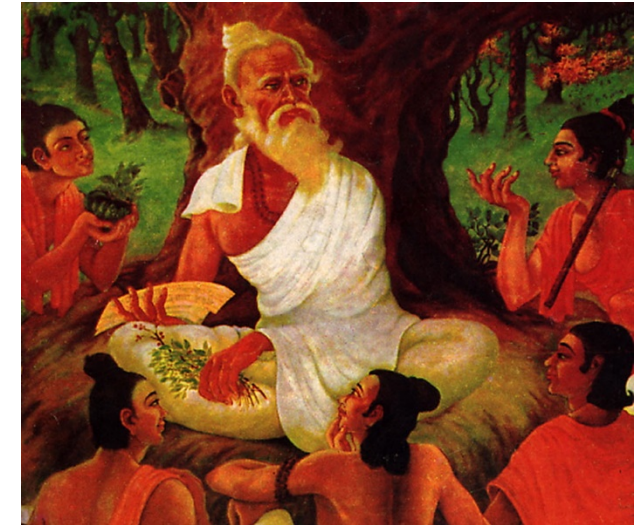
Ayus + Veda
Life Science



Ayurveda



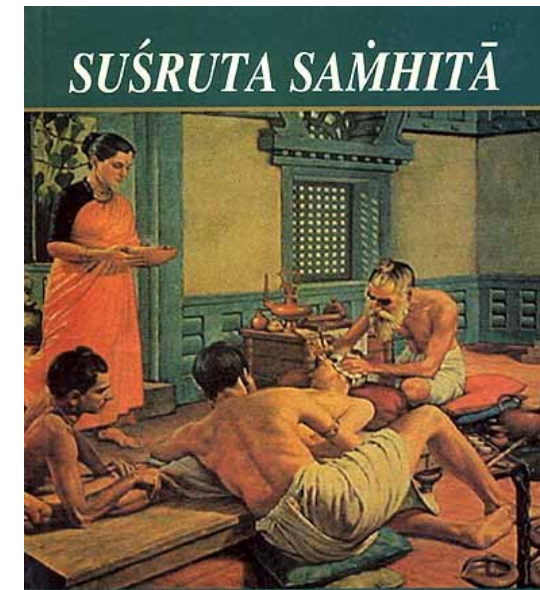
Indus Valley/Bronze Age civilization (3300-1300 BCE)
Followed by Vedic Period (1500-500 BCE)



Flow of knowledge ~500BCE



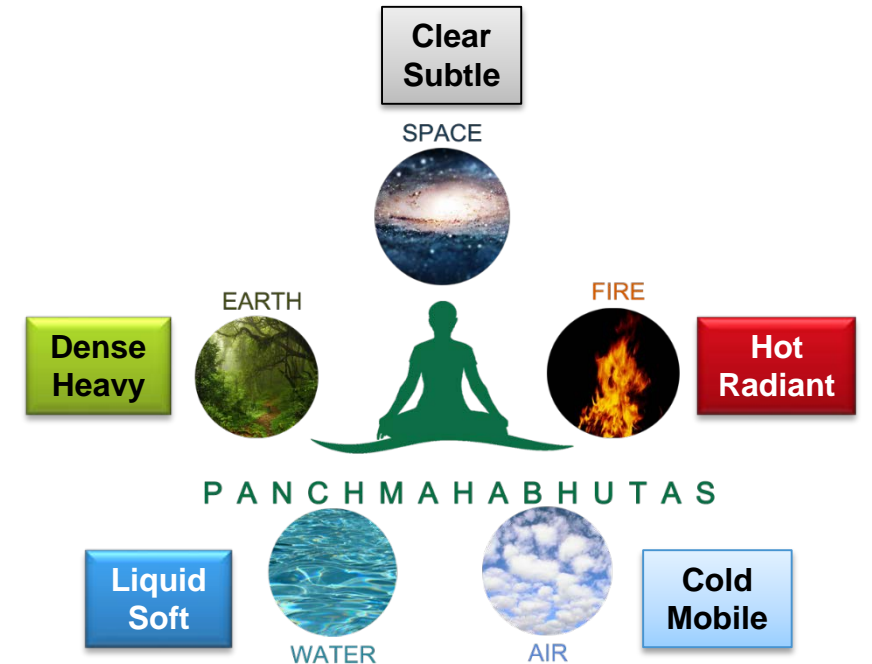
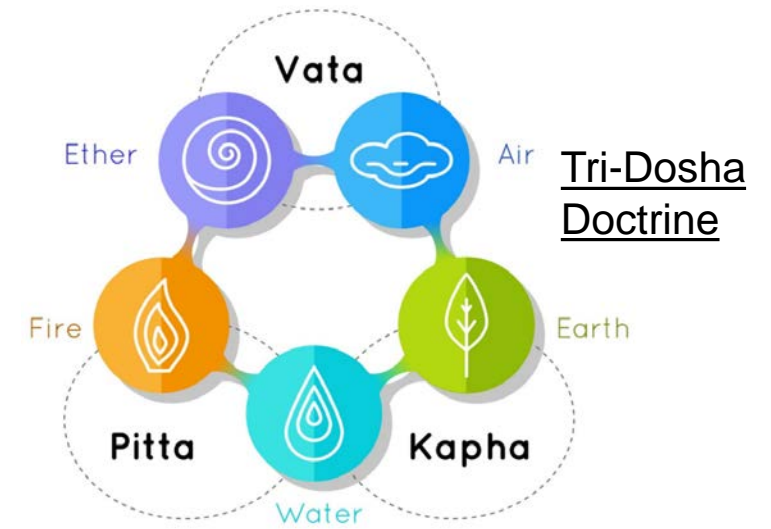
CHARAKA SAMHITA



Principles of Ayurveda

Cardinal Principle:

The macrocosm (*loka*) and microcosm (*purusha*) share common elements.



Principles of Ayurveda



Prakriti– Mind-body constitution determined at conception.
Classification of a person on the basis of predominance of a *dosha*

Ayurveda recognizes 10 determinants that affect the health of a person:

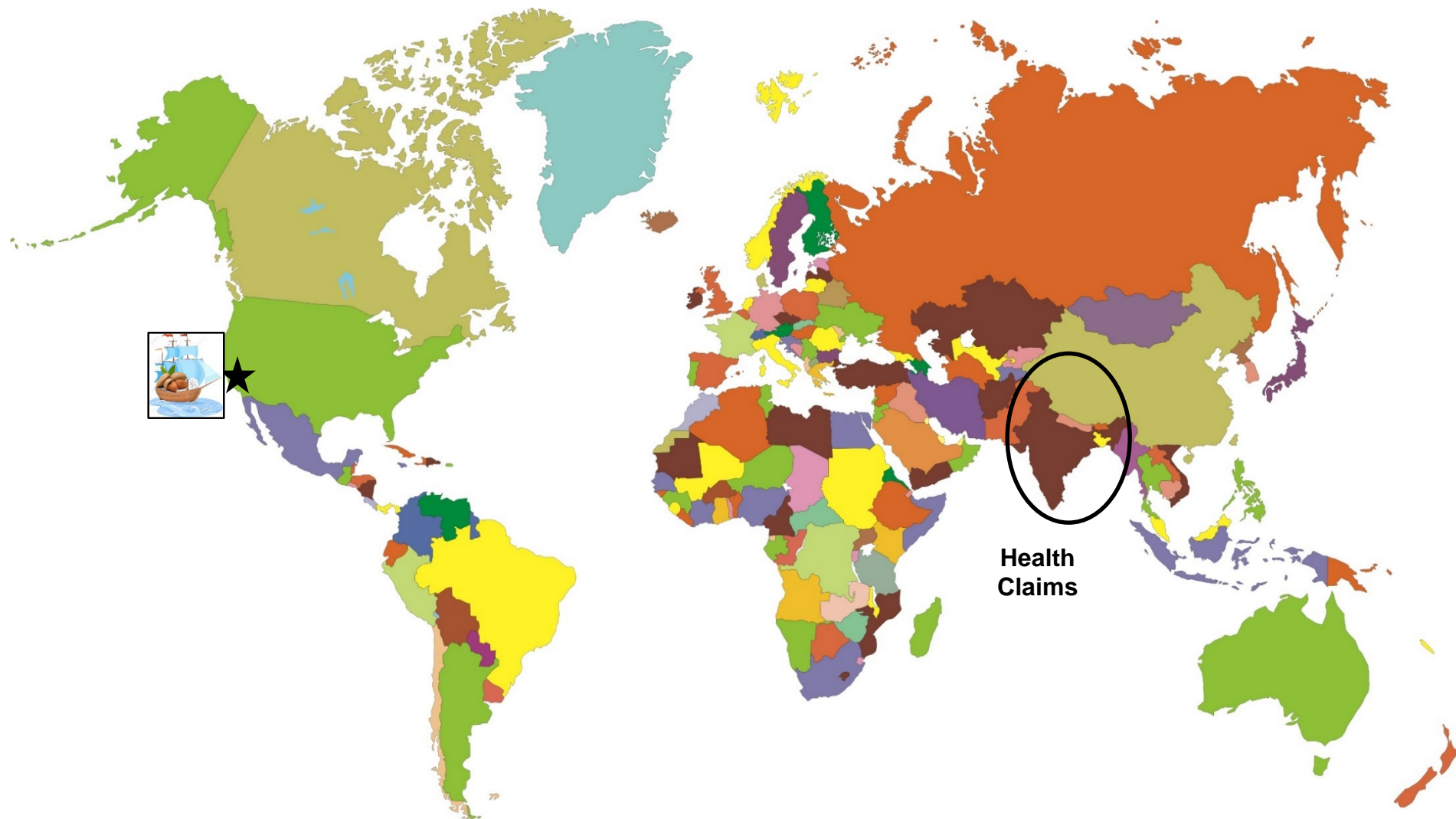
1. *Dushya* (body tissues and excretory products)
2. *Desha* (place of residence and body)
3. *Bala* (strength: physical and mental)
4. *Kaala* (seasons)
5. *Anala* (digestion and metabolism)
6. *Prakriti* (genetic and phenetic constitution)
7. *Vaya* (age)
8. *Sattva* (determination)
9. *Satmya* (habituation)
10. *Ahara* (food)



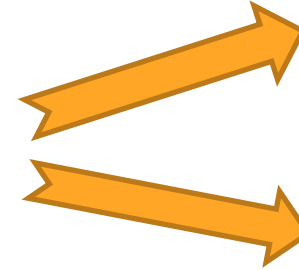
Why Ayurveda?



Why Ayurveda?



Why Ayurveda?



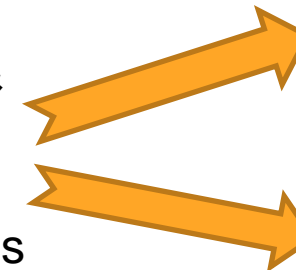
Content Claims

Health Claims

The Advertising Standards Council Of India



Published & Recognized Ayurveda Health Claims



Product Claims

Communications

Ayurveda: Almond health benefits



Dr. Padma Venkatasubramanian

A report documenting and substantiating the findings of an exhaustive search of literature sources of Ayurveda, Unani and Siddha (AUS) related to documented use and health benefits of almonds.



3.1 Ayurvedic references:

(1)

वातादौ वातवैरी स्यान्नेत्रोपमफलस्तथा ।

वातादः उष्णः सुस्निग्धो वातघ्नः शुक्रकृत् गुरुः ॥ (भावप्रकाश निघण्टु, आग्नादि फलवर्ग १२३)

Vātādau vātavairī syānnetropanaphalā |

Vātādah uṣṇah susnigdho vātaghnah śukrakṛt guruh ||

(Bhāvaprakāśa nighaṅṭu, āmrādi phalavarga 123)

"Almond seeds are called by different names like vātāda, vātavairī (since it pacify vāta doṣa) and netropamaphalā (because they resemble human eyes). They are hot in potency, unctuous, reduce vitiated vāta doṣa, generate sperms and they are heavy to digest". (Bhāvaprakāśa nighaṅṭu, āmrādi phalavarga 123) (Mishra, 2002).

(2)

वातादमज्जा मधुरे वृष्यः पित्तानिलापः ॥

स्निग्धोष्णः कफकृन्नेष्टो रक्तपित्त विकारिणाम् ॥ (भावप्रकाश निघण्टु, आग्नादि फलवर्ग १२४)

Vātādamajjā madhuro vṛsyah pittānilāpah |

Snigdhoṣṇah kaphakṛnneṣṭo raktapitta vikāriṇām ||

(Bhāvaprakāśa nighaṅṭu, āmrādi phalavarga 124)

"Seed kernels of almond seeds are sweet in taste. They improve sexual performance and pacify vitiated pitta and vāta doṣas. They are unctuous and hot, may enhance kapha doṣa. They are not good for individuals suffering from bleeding disorders". (Bhāvaprakāśa nighaṅṭu, āmrādi phalavarga 124) (Mishra, 2002).

(3)

वाताम उष्णसुस्निग्धो वातघ्नश्शुक्रकृद्गुरुः ॥

(भोजनकुतूहलम्, फलवर्ग, वातामगुणाः)

Vātāma uṣṇasusnigdho vātaghnaśśukrakṛdguruh ||

(Bhojanakutūhalam, Phalavarga, Vātāmaguṇāḥ)

4

"Almond seeds are hot in potency; unctuous, heavy to digest and alleviate vāta doṣa, they increase reproductive tissue". (Bhojanakutūhalam, Phalavarga, Vātāmaguṇāḥ) (Venkat et al., 2012).

(4)

बृंहणान्वनिलघ्नानि बल्वानि मधुराणि च ॥ (सुश्रुत संहिता, सूत्रस्थान, ४६-अन्नपानविधि अध्याय, १८८)

Bṛmhaṇānyanilaghñāni balyāni madhurāṇi ca ||

(Suśruta samhita, sūtrasthāna, 46, Annapānavidhi adhyāya, 46)

"Sweet tasting Almond seeds are capable of enhancing body mass and strength and reducing vitiated vāta doṣa". (Suśruta samhita, sūtrasthāna, 46, Annapānavidhi adhyāya, 46) (Acharya, 1992).

(5)

बादादममूर्च्छा सुस्निग्धं वातघ्नं बलशुक्रकृत् ॥ (मदनपाल निघण्टु, फलादिवर्ग ६२)

Bādādamauṣṇam susnigdham vātaghnam balaśukrakṛt |

(Madanapāla nighaṅṭu, phaladivarga 62)

"Bādāma (almond seeds) are hot in potency, unctuous, reduce vitiated vāta doṣa, enhance strength and generate sperm". (Madanapāla nighaṅṭu, phaladivarga 62) (Dash, 1994).

(6)

वातामभिषुकाक्षौडमुकुलकनिकोचकम् ।

सोरुमाणं गुरुस्निग्धं मधुरं रसपाकयोः ।

वीर्योष्णं बृंहणं बल्यं वातघ्नं कफपित्तलं ।

दाहक्षयहरं विष्टम्ब्यस्रसादनम् ॥ (कैव्यदेवनिघण्टु, औषधिवर्ग, ५०७-५०८)

Vātāmabhiṣukākṣauḍamukūlakanikocakām |

Sorumaṇām gurūsniigdham madhuram rasapākayoh |

Viryosṇam bṛmhaṇam balyam vātaghnam kaphapittalam |

Dāhākṣayaharam viṣṭambhyasraprasādanam || (Kaiyyadeva nighaṅṭu, auśadhivarga, 507-508)

5

Ayurveda: Almond health benefits

Ayurveda:

- Almond is generally referred to as 'Vatada' or 'Badama' or 'Vatama'.
- It is also called 'Suphala' or the superior nut.

3.1.4 Functional properties as per Ayurveda:

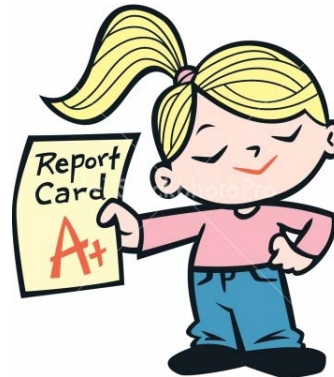
- **Rasa (taste):** madhura^{9,13} (sweet)
- **Guna (properties):** snigdha^{9,12} (unctuous), guru¹² (heavy to digest)
- **Virya (potency):** ushna¹² (warm)
- **Vipaka (taste after digestion):** madhura²⁰ (sweet)
- **Dosha Karma (action on doshas):** vata-pittahara (reduces vata and pitta doshas), Kaphakara (may increase kapha dosha). On excess consumption, in some individuals may aggravate of pitta dosha^{9,13,15,25}.



Ayurveda: Almond health benefits

3.1.5 Pharmacological actions^{9,10,13,20,25}:

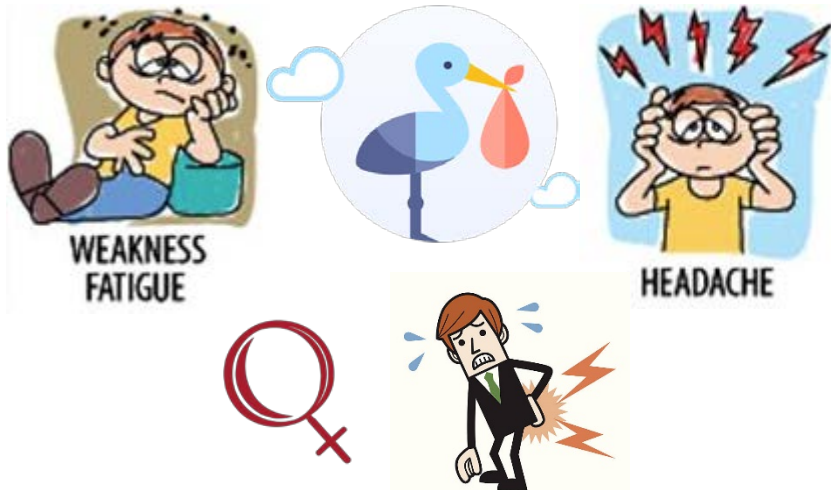
- **Poshaka:** tonic; supportive to all tissues
- **Brimhana:** enhances bulk of body
- **Balya:** enhances muscle strength
- **Vrshya:** aphrodisiac
- **Shukrakrd:** provides potency to reproductive tissue/function
- **Vatanadi balya:** provides nourishment to nerve tissue
- **Vatanadi uttejaka:** nervous system stimulant
- **Varnya:** enhances complexion, protects health of skin



Ayurveda: Almond health benefits

3.1.6 Therapeutic indications^{9,10,13,20,23,25}:

- Kshata ksheena: debility and weakness, occurring because of chronic illness especially, lung disorders
- Shukra daurbalya: infertility because of diseases of semen, like decreased sperm count, morphological problems of sperm cells
- Shirashula: headache
- Pradara: menorrhagia
- Katishula: low back ache

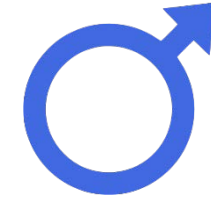


Therapeutic usage

a) Internal administration:

10-15g of almond seeds commonly prescribed in the treatment of following conditions:

- Weakness of brain and central nervous system, and senile sensory loss^{9,23}
- Paralysis, facial paralysis, palsy^{10,13,}
- Chronic constipation^{9,42}
- Debility and weakness because of diabetes^{13, 42}
- Burning micturition^{13,}
- Chronic cough, general debility, weakness, weight loss, cachexia²³
- Male infertility, decreased sexual performance^{12,25}
- Dysmennhorea and menorrhagia^{13,30}



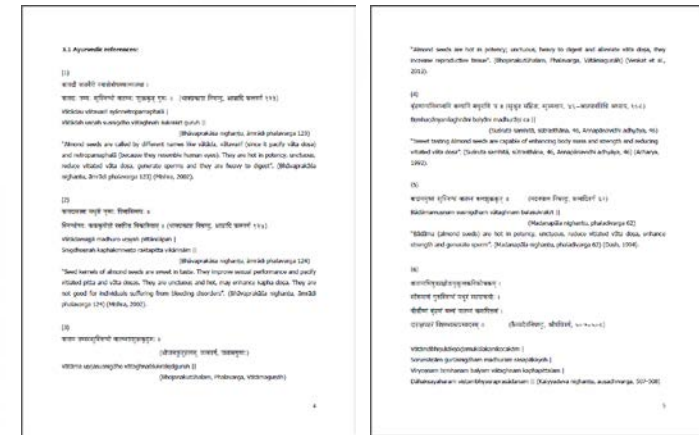
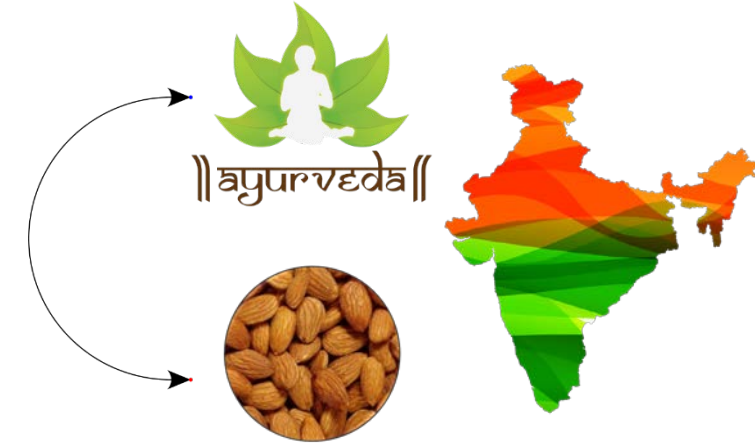
b) External application

- Almond seed paste application in discoloration of skin, itching and headache.
- Used as toothpaste in teeth and gum diseases.



Summary

1. Ayurveda holds a vital place in traditional Indian medicinal system and culture.
2. Almonds hold a vital place in Indian traditions and culture.
3. Investigating Ayurveda references to almond health benefits is vital.
4. Published Ayurveda references to almond health benefits have been reported.
5. Claims based on published references fall under purview of Ministry of AYUSH and recognized by FSSAI and ASCI.



Next Steps

1. Work with Ayurveda expert to obtain literature supported claim statements.
2. Provide researched output and claim statements for AYUSH review & approval.

Agenda

1. India, The Growing Economic Powerhouse

- Sudarshan Mazumdar, Regional Director, India
Almond Board of California

2. The Changing Regulatory Landscape

- Julie Adams, Vice President, Global Technical & Regulatory Affairs,
Almond Board of California

3. Leveraging Ancient Wisdom

- Dr. Swati Kalgaonkar, Senior Manager, Nutrition Research Program,
Almond Board of California

4. Leveraging Traditions for Market Growth

- Sudarshan Mazumdar, Regional Director, India
Almond Board of California





Almonds in India

Almonds in India are Primarily Sold Loose with only 5%^[1] Being Sold in Packed Form

In Shell Almonds:
Cracked in India



Wholesale Market



Semi Wholesale



Mom n Pop Stores/
Specialized Dry Fruit Stores



Organized Retail



How Almonds are sold in India - Loose by Weight and Packaged Forms



Loose by Weight



Private Labels



Packaged in India



Imported Packs

Almond Consumption in India is Driven by Tradition

- Consumed raw, soaked & peeled or raw first thing in the morning.
- Given by mothers to children.
- Good for the brain.
- Provides energy that lasts through the day.
- Gifted during festivals and with wedding invitations.
- Integral part of prayer offerings.
- Usually eat 4-5 almonds per consumption occasion.



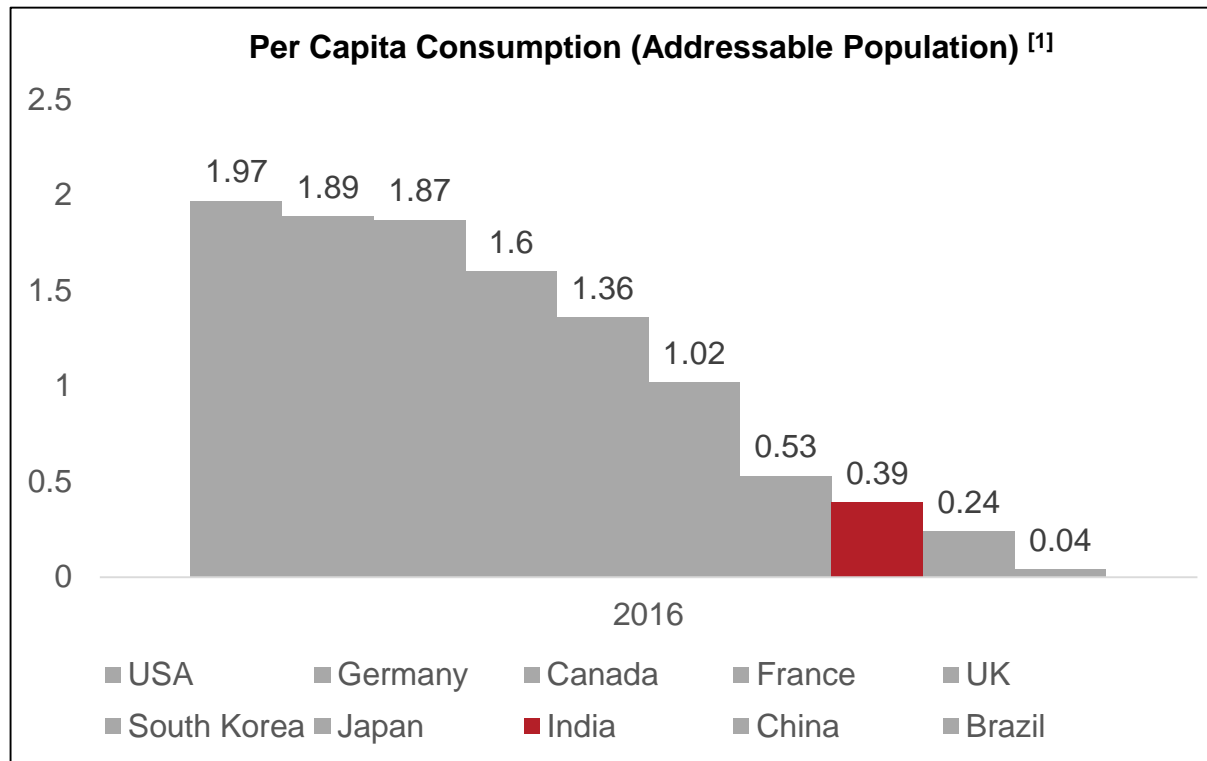


The Almond Opportunity

The Almond Opportunity in India

India's per capita consumption of addressable population* is very low compared to other regions like Canada, USA & Germany. [1]

Share of addressable population* growing with expansion of middle class. Middle class households to expand from 13.3 mn (2005) to 128 mn (2025 est.). [2]

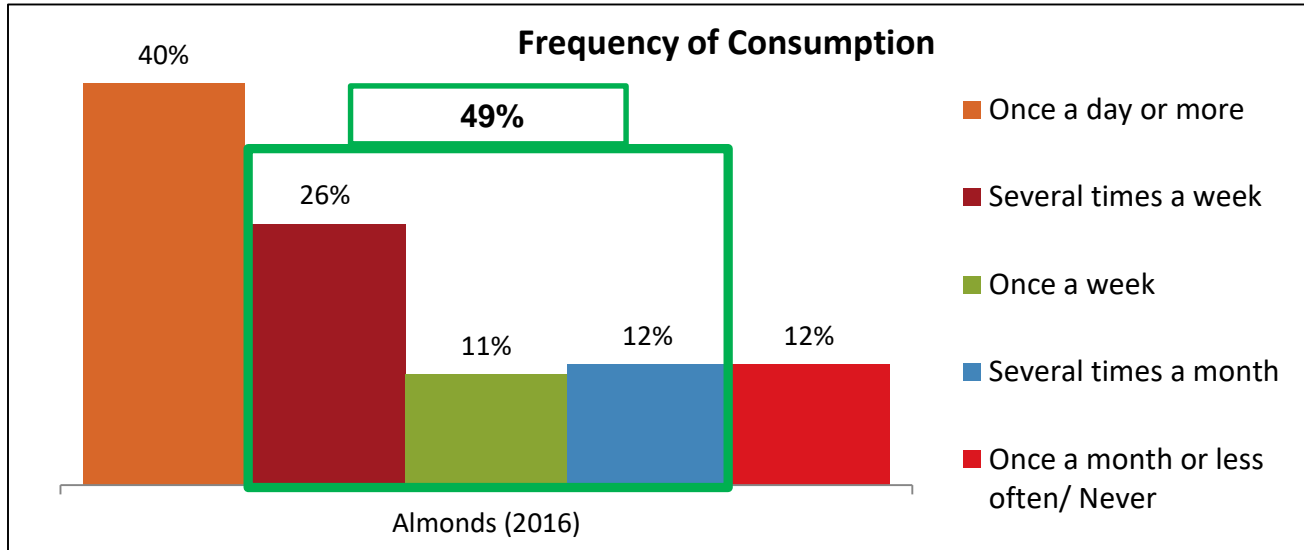


Country [2]	2010		2021 (Projected)	
	Addressable Population	% of Total Population	Addressable Population	% of Total Population
United States	303 mn	98%	334 mn	99%
China	938 mn	70%	1.16 bn	83%
India	505 mn	42%	774 mn	55%
Germany	79 mn	97%	79 mn	97%
France	61 mn	96%	65 mn	98%
U.K.	59 mn	95%	63 mn	96%
Canada	33 mn	97%	37 mn	98%
South Korea	47 mn	97%	49 mn	99%

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

Enhancing the Frequency of Consumption

Opportunity to increase frequency of consumption amongst people who eat almonds between several times a week to several times a month.



Opportunity to make Almonds a 'year long' consumption product.

Best Dry Fruit Described by Positioning and Personality Trait
(Total Sample n=1,986)

	Almonds	Cashews	Peanuts	Pistachios
Is eaten throughout the year	60%	22%	12%	8%



Harnessing the Opportunity

Using Tradition to Drive Consumption

Till 2013-14, the India program was aimed at reinforcing existing traditions and beliefs to grow almond consumption and its gifting.

- **Primary audience:** Mother/ nurturer
- **Psychographic Orientation:** Stay at home moms taking care of family's well being.
- **Primary Driver:** Success for the family
- **Key Benefits:** Mental Alertness + Energy Through the Day -> Long term success



Expanded Target: Family Consumption Campaign

In 2014, after a 4 stage research, we expanded the program to include Affluent Adults for the self consumption of almonds for the same benefits.

- **Primary audience:** Housewives, Working Men & Working Women
- **Psychographic Orientation:** Highly oriented towards healthy living.
- **Primary Driver:** Success both at home and at work.
- **Key Benefits:** Mental Alertness + Energy Through the Day -> Long term success



Almonds: Their Partner to Success

Mental Alertness + Energy Through The Day -> Productivity -> Success -> Prosperity

MARKETING PROGRAM



Family Consumption Campaign



Festive Campaign



Print Advertorial



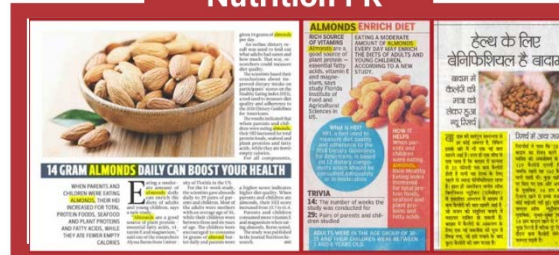
Trade Outreach Program



Media Events



Nutrition PR



Media Outreach



MARKETING PROGRAM

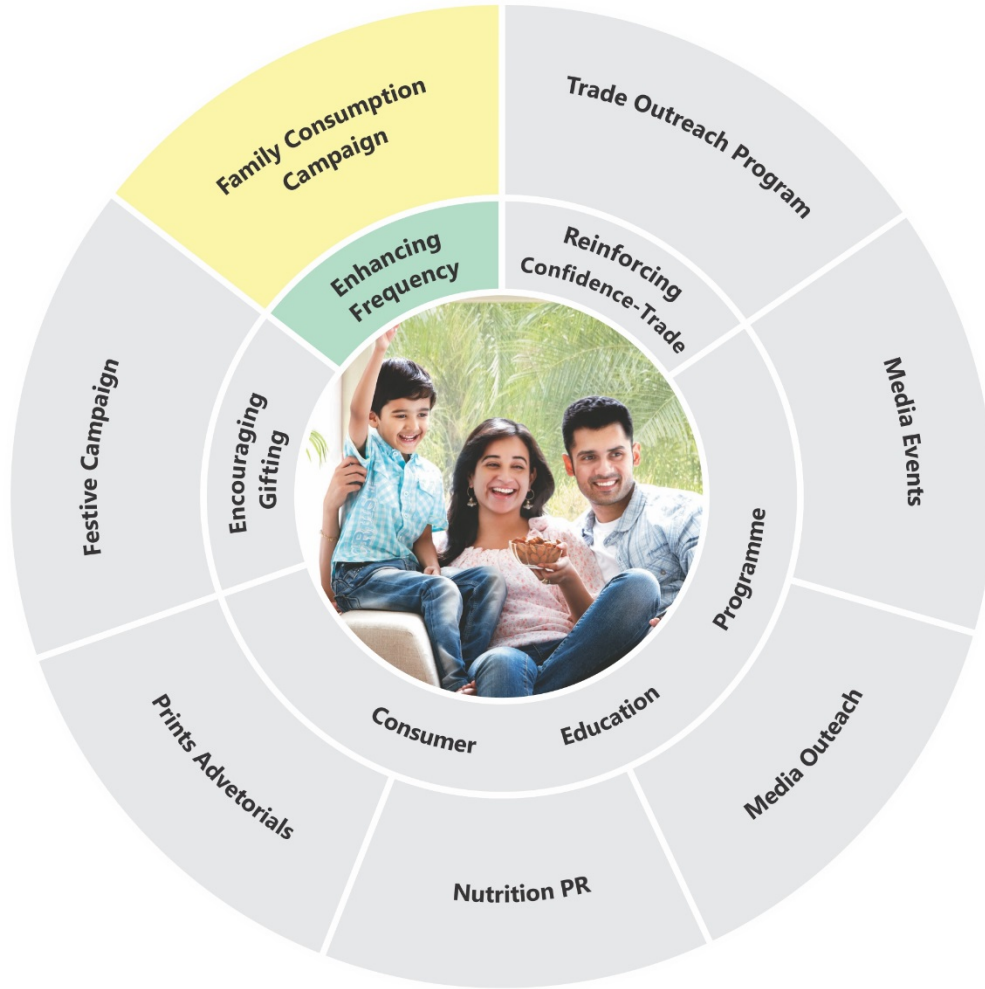
Family Consumption Campaign



Festive Campaign



Print Advertorial



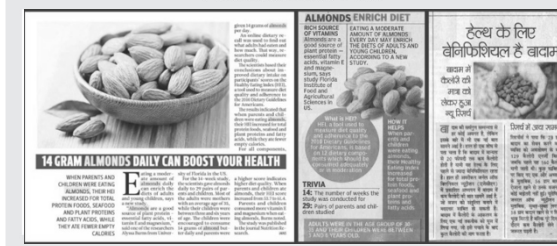
Trade Outreach Program



Media Events



Nutrition PR



Media Outreach



Family Consumption Campaign

Proposition



Why this works

Reinforces daily consumption

Permission to have more

'Investment' justifies premium price

Focuses on the 'long term' benefits

The Campaign Idea

No matter what tomorrow has in store, you're best prepared for success when you have your almonds today, everyday.

Tomorrow Begins Today

Mother Daughter Commercial



Family Consumption Campaign

Proposition



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MARKETING PROGRAM

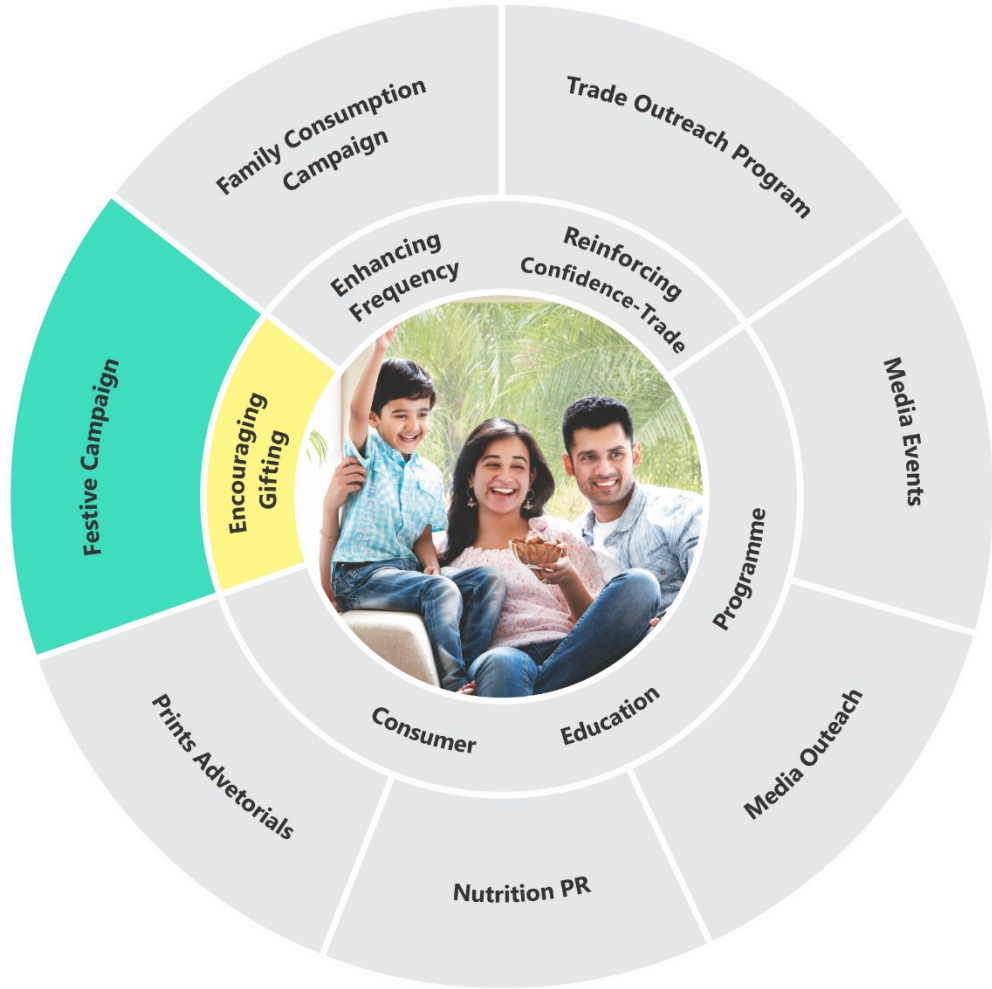
Family Consumption Campaign



Festive Campaign



Print Advertorial



Trade Outreach Program



Media Events



Nutrition PR



Media Outreach



Diwali Gifting: A Big Opportunity

- Diwali is a major festival in India. Exchange of Gifts is customary.
- Traditionally sweets, dry fruits clothes etc. are gifted. Food companies come out with specific gift packs during this period. However today many new categories compete for share of gifting wallet.
- Customary during Diwali: Offering Prayer to Lakshmi (the goddess of wealth), Buying new clothes, Cleaning homes, making of sweets for visitors, painting of the house etc.
- A time for bonding, for family members to get together, people visiting each others' homes.



Almonds Share of Overall Gifting:

Among all people in our target who give gifts during festivals, 11.9%^[2] gift dry fruits.

	% share ^[2] of Dry Fruits Among Gift Givers (During Festivals)
Target Audience (22-50, F, NCCS A, NW)	11.9%
Non Target	8.8%
Urban Universe (NCCS A/B/C, NW)	9.2%

Diwali Gifting is About Portraying Your Feelings

Relationships define the type of gifting on Diwali

The more personal the relationship the higher and precious is the value of the gift.

Close Relationships

Popular gifts:

Dry fruits, jewelry (for spouse), toys (for children), chocolates (premium ones), electronics, clothes, bed sheets, other gifts customized as per receivers' tastes or interests.

Distant Relationships

Popular gifts:

Smaller packs of **dry fruits**, Indian sweets, namkeen/juice boxes (hampers), chocolates, cookies.

Work Relationships

Popular gifts:

Dry fruits, sweets, namkeen, juices, show pieces, chocolates, biscuits.

Dry fruits as a category fits most of the gifting occasions across relationships

Strength of Almonds as a Gift

A Good Gift to Give

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

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**

Final Diwali Broadcast Spots

The Campaign Idea: The most special relationships are those that are multi-faceted.

That special someone becomes a friend, a confidante, a guide and a whole lot more.
Gifting of Almonds are a great way to honor those special relationships.

Film 1 – Best Friends Forever



Diwali Gifting
Commercial
Best Friends Forever

Film 2 – My Aunt, My Bestie



Diwali Gifting
Commercial
My Aunt, My Bestie

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MARKETING PROGRAM

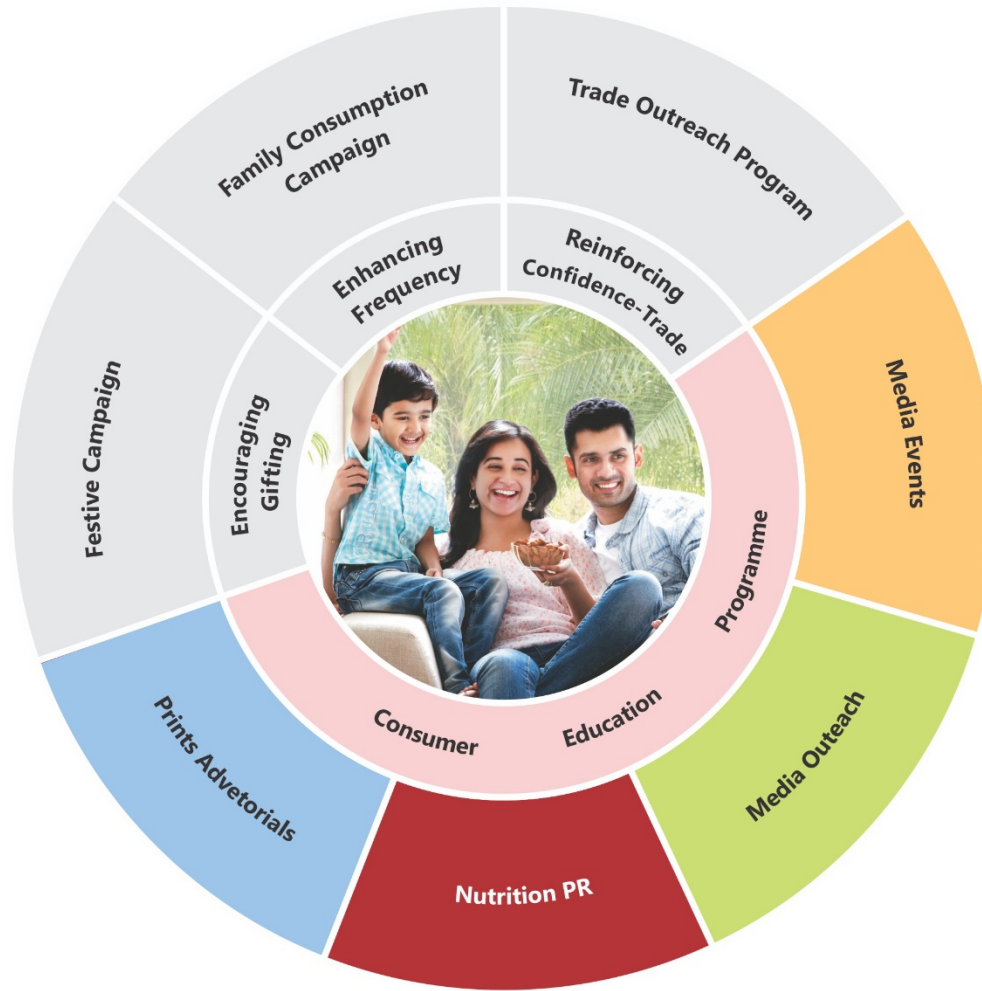
Family Consumption Campaign



Festive Campaign



Print Advertorial



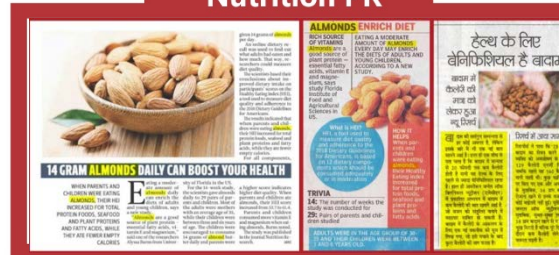
Trade Outreach Program



Media Events



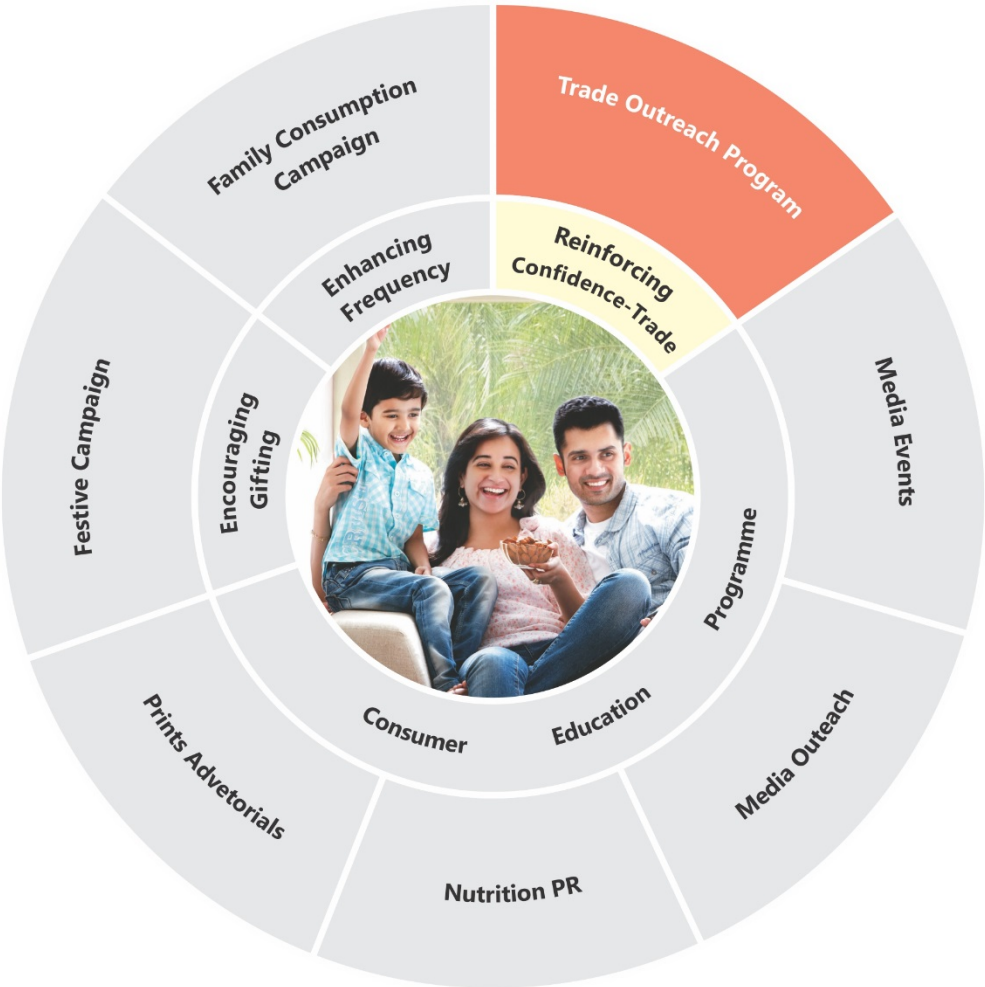
Nutrition PR



Media Outreach



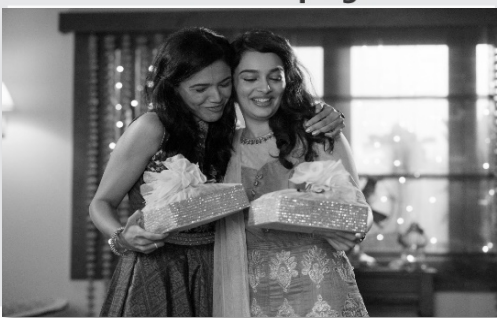
MARKETING PROGRAM



Family Consumption Campaign



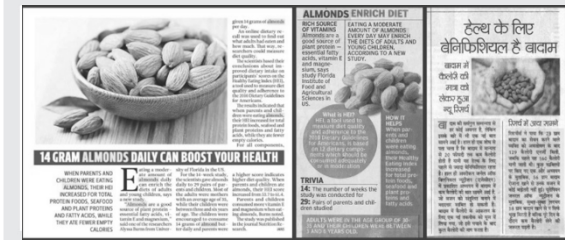
Festive Campaign



Print Advertorial



Nutrition PR



Trade Outreach Program



Media Events



Media Outreach



Trade: Reinforcing Confidence in Almond Potential

Trade Conference

45% increase in importers attending.



Trade Newsletters

ALMOND BOARD BULLETIN
EXAM ISSUE

Almond Board of California returns with another issue of its news bulletin, highlighting the latest marketing initiatives that were successfully launched in February and March, 2017.

During the months of February and March, school children all over India get into preparation mode for their annual examinations. This is a stressful time for the students as well as their parents and teachers. It is a time when personal health is often neglected in the pursuit of academic success. We identified this period as an opportunity to highlight the role of almonds as a useful addition to one's diet. This strategy was in line with our campaign message of 'Tomorrow Begins Today'.

Television Commercials

On February 15, 2017, our Exam Broadcast Campaign began with the release of three television commercials on popular channels across the country. The messaging was centered on the benefits of regular almond consumption.

Each television commercial focused on a specific family member (the mother, the working man and the working woman), and showcased how the consumption of almonds can help one lead a healthy and successful life. All three television commercials ended with a shot of our protagonists helping themselves to a handful of almonds – further illustrating the role of almonds as a helpful and welcome addition to the lifestyle of all family members.

Our commercials were broadcast across leading television channels like Star Plus, Life OK, Zee Classic, Zee Action, News18 India, B4U Music, Comedy Central, History TV 18, Zee Studio, Star Pravah, Gemini TV, SUN TV and Raj TV.

The ad was aired more than **9,370** times across leading channels over four weeks.

ALMOND BOARD BULLETIN
2017

As the new year comes around, we're back with a brand-new edition of the Almond Board Bulletin. In this issue, we will tell you about our latest marketing efforts through television advertisements and press releases along with a special award we won!

Advertising

The winter broadcast campaign this year for the Almond Board of California consisted of three 30-second ads and three 15-second edits that allowed the audience to follow the characters in their journey to success. Working along with the theme of "Tomorrow Begins Today," our ads demonstrate how almonds are a small investment today to build into the bigger successes of tomorrow.

Each ad showcases how our target audiences go about making the best of every opportunity in life and achieve success in anything they do. Additionally, the underlying emotion of love and caring for the family clearly binds the commercials together, thus making the campaign more cohesive. The binding force of caring and love for

the family is evident in each commercial for the man, the working woman and the mother respectively.

The commercials established that with the right determination and the will to succeed, a brighter tomorrow is something we can all hope to achieve. The spots signed-off with a handful of almonds to show that these are the nuts that power us everyday to success.

The ads were aired 16,229 times on popular channels like Colors, Star Plus, Zee Action, NEWS 24, B4U Music, Comedy Central, Animal Planet, Sony Pix, Star Pravah, SUN TV etc. The campaign was received exceptionally well and was a resounding success.

The ad was aired more than **16,229** times across leading channels over ten weeks.



Program Impact

Gaining Strength in Consumer Minds

Top of Mind (ToM)

Almonds showed strong growth in awareness and further strengthened lead over all other dry-fruits.

Top of Mind Awareness	Total (Overall)		Total (Snack)	
	2014	2016	2014	2016
Almonds	52%	68%	35%	59%
Cashews	36%	18%	39%	22%
Dates	4%	4%	6%	5%

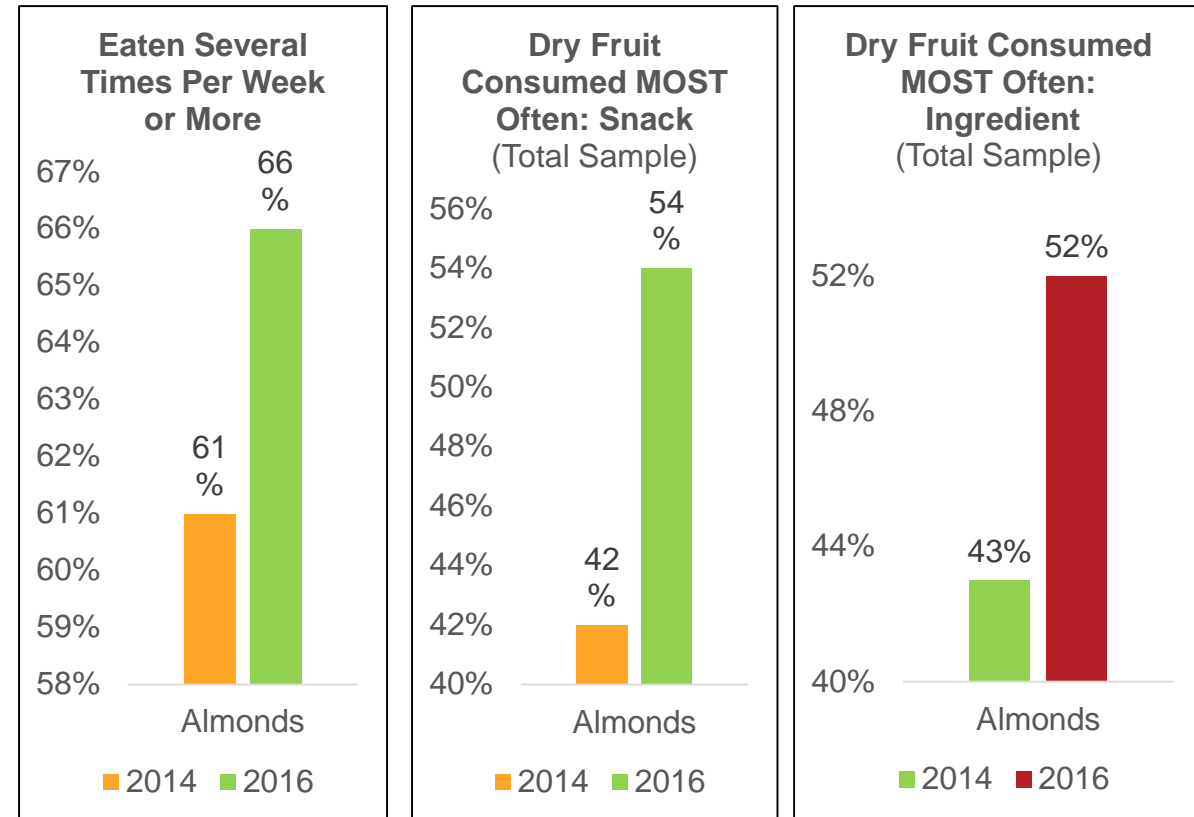
Attributes

Almonds out-scored all other dry fruits on all parameters of importance with a healthy lead over Cashews

	Importance	Almonds 2016	Lead over Cashews
Provides energy	46%	45%	22%
Best tasting dry fruit	45%	44%	20%
Good for my heart	45%	43%	16%
Good for brain / concentration	43%	46%	23%
Must eat in the morning	43%	47%	23%
Perfect dry fruit for gifting	43%	41%	18%

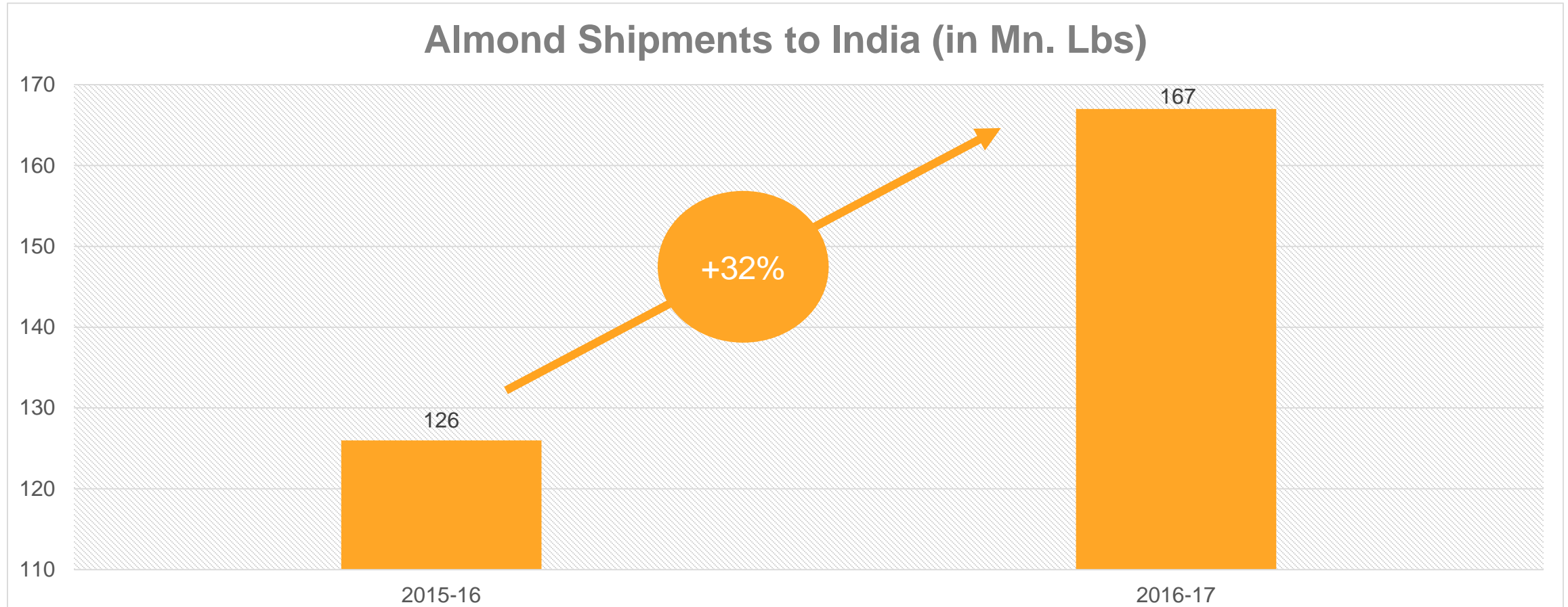
Increased Frequency of Consumption

Strong increase in stated frequency across 'consumption as a snack & as an ingredient' and 'Eaten several times per week or more'



2016-17: Record Shipments to India

- With a 32% growth in shipments, India ended the year to become the 2nd largest export destination for California Almonds in 2016-17



Key Highlights of the Year Gone By...





Thank You