



C A L I F O R N I A W A L N U T S

TODAY, TOMORROW, AND YEARS TO COME

January 31, 2018

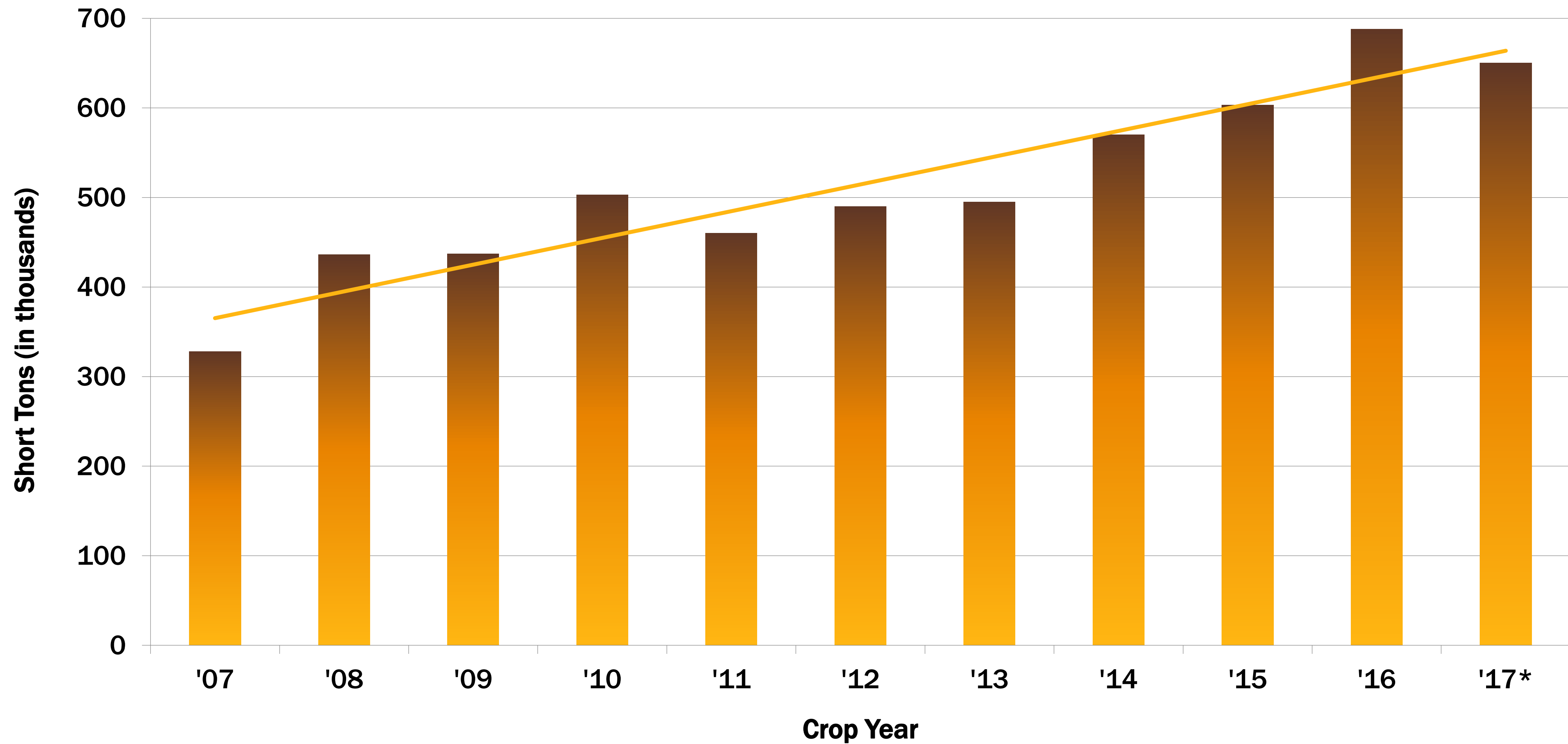


MISSION

The Mission of the California Walnut Board and Commission is to:

Increase demand for California Walnuts

CALIFORNIA WALNUT PRODUCTION



*estimate

C A L I F O R N I A
WALLENUTS

BRANDING



NEW LOGO



LOGO RESEARCH HIGHLIGHTS

95% of survey respondents like the logo

Top 5 words associated with walnuts based on the logo:

- ▶ Natural
- ▶ Healthy/nutritious
- ▶ Fresh
- ▶ High Quality
- ▶ Premium

71% said they would be **more likely to purchase** the package with the logo over other available packages

71% rated the package with the logo as **high quality**

DOMESTIC MARKETING





NEW ADVERTISING - PRINT



Roasted Tomato Walnut Chicken

California Walnuts

FOR THE BEST SIMPLE MEALS EVER

From starter to entrée, add flavor, texture and heart-healthy* goodness with great tasting California walnuts. For these recipes and more, visit Walnuts.org   



So Simple. So Good.™



*Heart-Check food certification does not apply to recipes unless expressly stated. See heartcheckmark.org/guidelines. Supportive but not conclusive research shows that eating 1.5 ounces of walnuts per day, as part of a low saturated fat and low cholesterol diet and not resulting in increased caloric intake, may reduce the risk of coronary heart disease. (FDA) One ounce of walnuts provides 18g of total fat, 2.5g of monounsaturated fat, 1.3g of polyunsaturated fat including 2.5g of alpha-linolenic acid - the plant-based omega-3.



MEAL




KID FRIENDLY



Walnut, Vegetable and Chicken Quesadillas

California Walnuts

FOR THE BEST KID FRIENDLY MEALS EVER

For flavor, crunch and heart-healthy* goodness, remember the California walnuts. For these and other recipes your kids will love, visit Walnuts.org   



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BAKING



Apple Walnut Crostata

California Walnuts

FOR THE BEST SIMPLE MEALS EVER

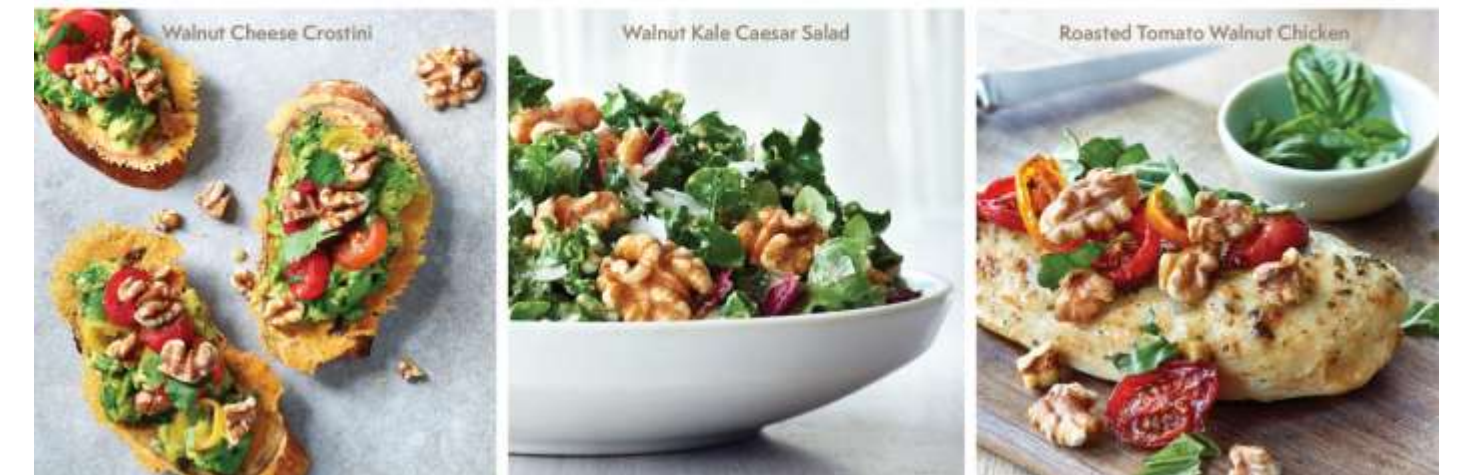
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NEW TV AD – VERSION 1



NEW TV AD VERSION 2



DIGITAL



California Walnuts
FOR THE BEST SIMPLE SALADS EVER
Walnut Raspberry Salad
with Raspberry Vinaigrette

[VIEW RECIPES](#)

California Walnuts
FOR THE BEST SIMPLE SALADS EVER



Walnut Raspberry Salad
with Raspberry Vinaigrette


[VIEW RECIPES](#)



California Walnuts
FOR THE BEST SIMPLE SALADS EVER


[VIEW RECIPES](#)

SAVEUR
RECIPE OF THE DAY




April 04, 2017


Shredded Beef Empanadas



CORN TAMALES




SIMPLE TOMATILLO SALSA

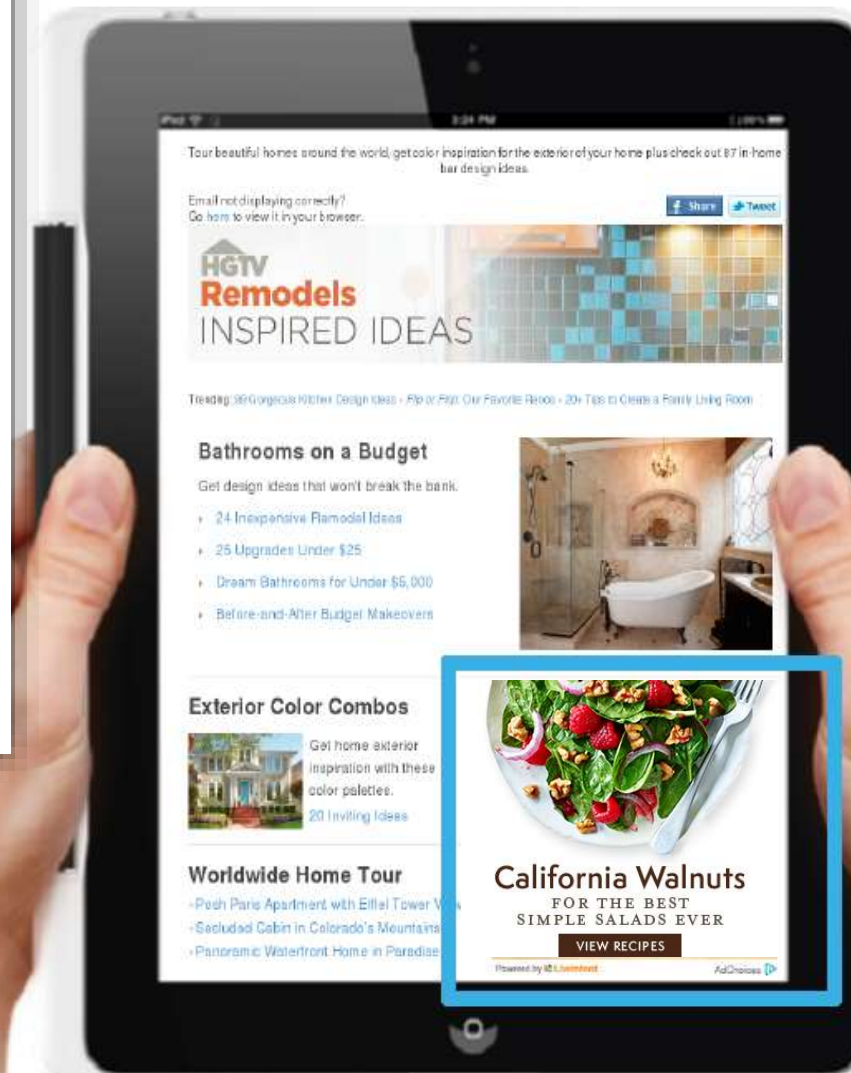


California Walnuts
FOR THE BEST SIMPLE SALADS EVER

[VIEW RECIPES](#)



MAKE THE BEST TORTILLAS AND EMPANADAS WITH THIS MASA



Four beautiful homes around the world get color inspiration for the exterior of your home plus check out 17 in-home bar design ideas.

Email not displaying correctly? Go here to view it in your browser.

HGTV Remodels
INSPIRED IDEAS

Trending: 30 Gorgeous Home Design Ideas - 10 of the Most Colorful Rooms - 24 Tips to Create a Pretty Living Room

Bathrooms on a Budget
Get design ideas that won't break the bank.

- 24 Inexpensive Remodel Ideas
- 25 Upgrades Under \$25
- Dream Bathrooms for Under \$5,000
- Before-and-After Budget Makeovers

Exterior Color Combos
Get home exterior inspiration with these color palettes.

20 Inspiring Ideas

Worldwide Home Tour

- Push Paris Apartment with Eiffel Tower View
- Secluded Cabin in Colorado's Mountains
- Panoramic Waterfront Home in Paradise

California Walnuts
FOR THE BEST SIMPLE SALADS EVER

[VIEW RECIPES](#)

NEW WEBSITE



California Walnut Recipes

Choose from a selection of walnut inspired recipes, everything from soups and salads to entrées and desserts.

ADVERTISING REACH

- ▶ **95%** of Adults 25 – 54 will see California Walnuts advertising an average of **26 times**
- ▶ Delivering over **4.1 billion impressions** to adults 18+



16 Weeks
Oct - June



65 Insertions
Oct - Aug



10 Months
Oct – July



TEAM GOOD FAT

- 9 in 10 consumers don't know which fats are good and which are bad.
- Partner with other good fat foods.
 - Avocados
 - Seafood
 - Olive Oil
- Supermarket RD program during American Heart Month



2018 REGIONAL TEST PROGRAMS

- ▶ Two markets: Charlotte & Minneapolis
- ▶ 4-week promotion - February, 2018
- ▶ Support with local advertising (i.e. spot TV, print, radio, etc.)
- ▶ Engage supermarket RDs through participating retailers



Celebrate
American
Heart Month

With Heart-Healthy*
California walnuts

For recipes
and more, visit
walnuts.org



Per one ounce serving.

*Supportive but not conclusive research shows that eating 1.5 ounces of walnuts per day, as part of a low saturated fat and low cholesterol diet and not resulting in increase calorie intake, may reduce the risk of coronary heart disease. (FDA) One ounce of walnuts provides 18g of total fat, 2.5g of monounsaturated fat, 13g of polyunsaturated fat including 2.5 of alpha-linolenic acid - the plant-based omega-3 - and has 4g of protein and 2g of fiber.

INDUSTRIAL DEVELOPMENT

Likelihood to Purchase Walnuts – In a Food

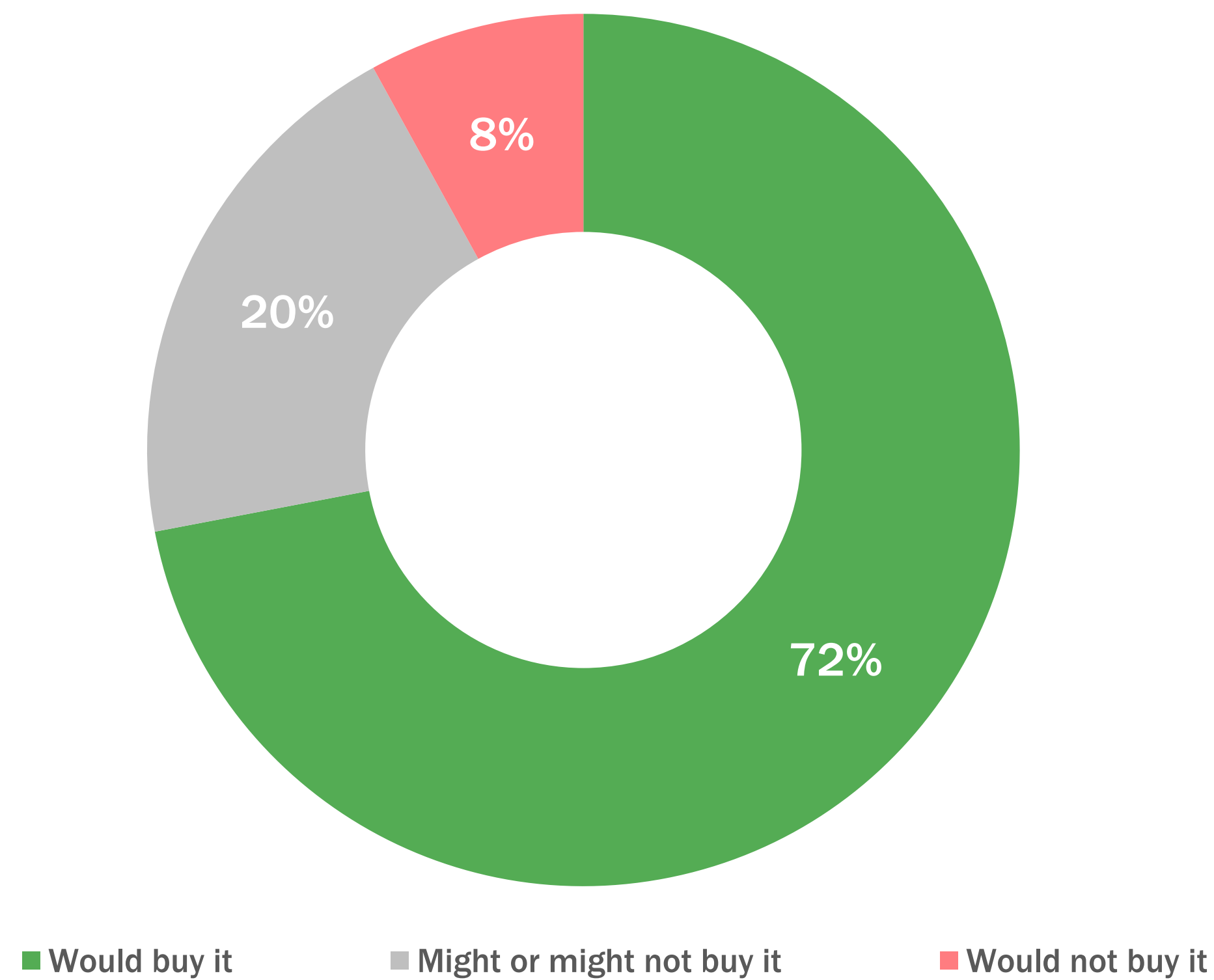
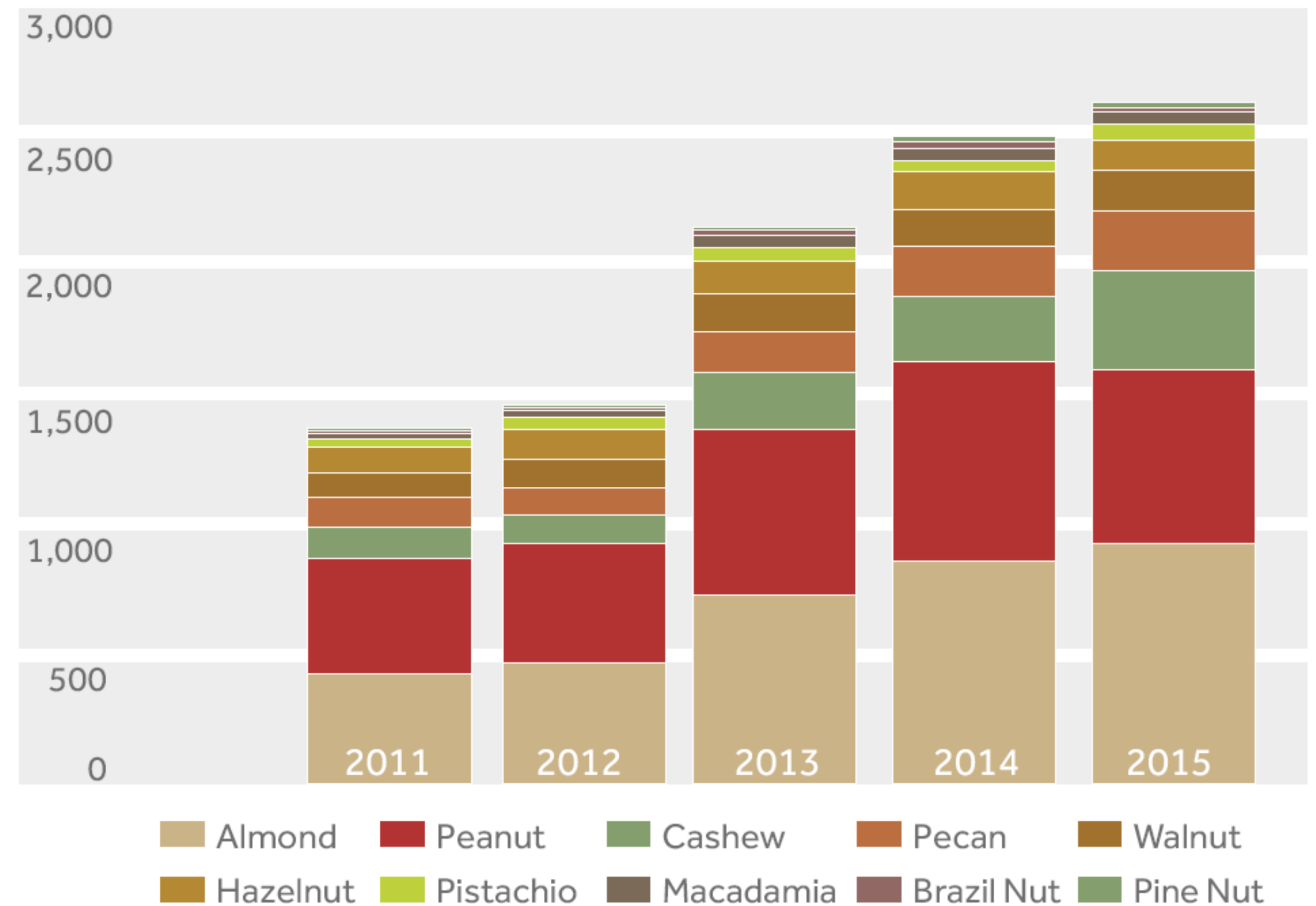


Fig 1. US new product introduction with various types of nuts, 2011-2015



Source: Mintel

INDUSTRIAL PROGRAM OBJECTIVES

Establish CWC as a dedicated resource to industrial needs

Drive awareness among the food industry about walnuts

Freshen image of walnuts

Promote successful CWB/CWC consumer-facing campaigns

New formulations from Mattson



C A L I F O R N I A W A L N U T S

EXPORT MARKETING



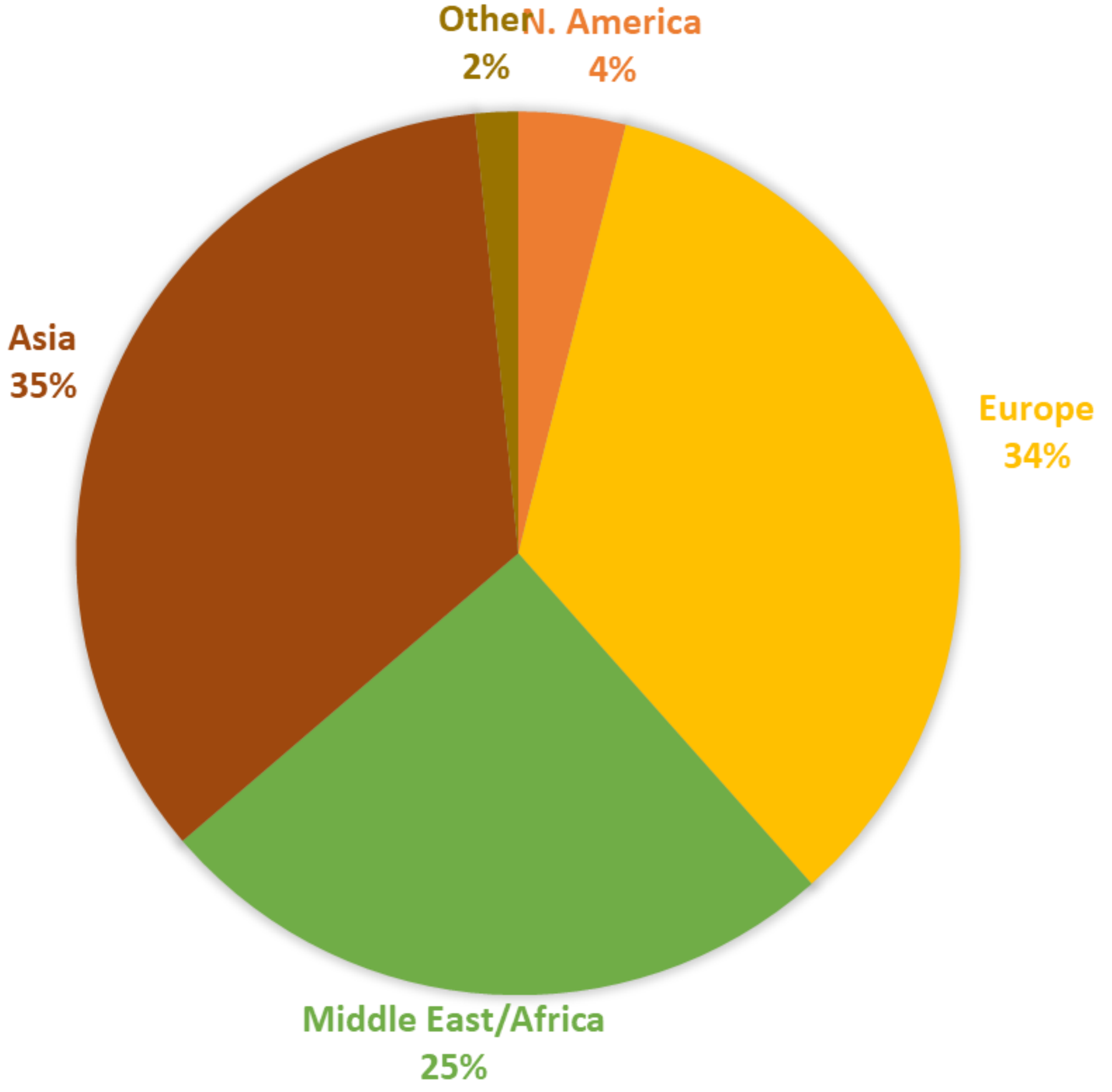


Over 67%
of the California
walnut crop has been
exported during the
16/17 crop year

EXPORT MARKETS 16/17

Market	Volume (ISE Lbs.)	% of Total Shipments
Germany	126 MM	9.1%
Turkey	124 MM	8.9%
Greater China	105 MM	7.6%
Japan	79 MM	5.7%
Spain	72 MM	5.2%
Korea	64 MM	4.7%
Italy	63 MM	4.6%
UAE	43 MM	3.1%
Canada	39 MM	2.8%
India	32 MM	2.3%

EXPORTS BY REGION



CURRENT MARKET MIX



China

Japan

South Korea

Germany

Spain

UK

EU Industrial
Region

Turkey

India

TACTICS

- Advertising
- Public Relations/Media
- Social/Digital Media
- Trade Promotions/Education
- Opinion Leader Outreach/Health Professional Programs
- Retail & Food Segment Promotions



**Health
& Fitness**



**The most
healthy snack
of the year.**

**CALIFORNIA WALNUTS,
NOT JUST FOR CHRISTMAS**

On the 5th day of Christmas California walnuts gave to me... **five great benefits:**
Sweetest taste, soft texture, good value, always consistent and high quality

On the 6th day of Christmas California walnuts gave to me... **6% iron**
(0.9mg per 30g serving)

On the 7th day of Christmas California walnuts gave to me... **seven thousand BC**
when the 'oldest tree known to man' (a walnut tree) was discovered by the Romans
(CLICK HERE)

On the 8th day of Christmas California walnuts gave to me... **eight different sizes**

Ask for CALIFORNIA walnuts EVERY time. [CLICK HERE](#) to read more about the history of California walnuts.

Whatever the season make California walnuts a part of it. Perfect as a snack or in pastries, cakes and breads. Look out for email updates on our campaigns to support you, throughout 2018.
Have a Happy Christmas and a prosperous New Year.

For further details contact: California Walnut Commission walnuts@comeintothegarden.co.uk 01628 535 755 www.californiawalnuts.uk

CONSUMER ACTIVITIES

Digital – Recipe Videos - Japan



くるみでヘルシーチーズケーキ
Walnut cheese cake

CONSUMER ACTIVITIES

Point of Sale Promotions

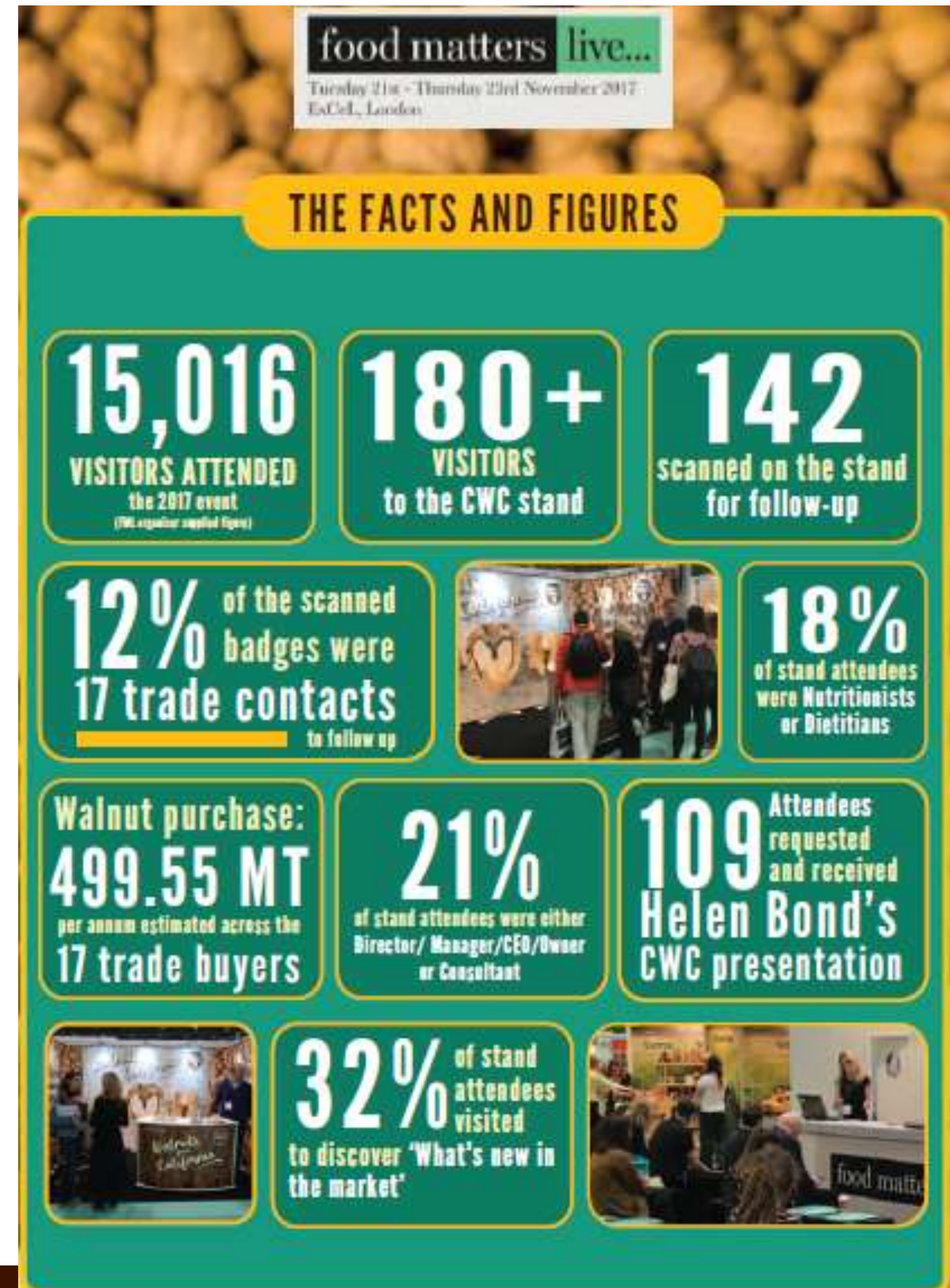
- Retail
- Bakery
- E-Commerce
- Home Shopping
- Department Store Food Hall



Mankattan Bakery Company Launch a New Product "Brown Sugar California Walnut Cake"

TRADE ACTIVITIES

- Trade Shows
- Technical Seminars
- Recipe Development
- Chef Inspiration Contests
- Trade Public Relations
- Trade Advertising – digital and print



TRADE ACTIVITIES



Walnut bar



Walnut cake donut



Walnut salted caramel donut

Food Service

- Menu Promotions
- Technical Seminars
- Collaboration with Food Service Publications
- School Lunch Programs
- Institutional/Mass Catering Promotions

KEY OPINION LEADERS & INFLUENCERS - INDIA: SCIENTIFIC MEETING



Dr. H. K. Chopra

- Explore opportunities to define new areas for walnut research in India
- Establish network of Indian researchers and medical professionals

California Walnut Commission organises Scientific and Health Research Meeting in New Delhi

CHANDIGARH: California Walnut Commission (CWC) hosted a one-day Scientific and Health Research Meeting in New Delhi today to discuss the role of walnuts in disease prevention and maintenance. The day long interactive program witnessed renowned researchers and medical professionals who participated in sessions on general nutrition and dietary recommendations, cardiovascular health, Alzheimer's disease, cognitive health and diabetes. These sessions provided updates on existing health and nutrition projects with



some specific insights about the CWC health research program. The event also saw the presence of international researchers who talked about their area of study on walnuts namely:

Dr. Lenore Arab, MSc, PhD on association between walnut consumption and diabetes risk
 Dr. Abha Chauhan, PhD on beneficial effects of a diet with walnuts in Alzheimer disease
 Dr. Emilio Ros, MD, PhD on new advancements with the Mediterranean diet & Walnuts and Healthy Aging
 The CWC has been actively highlighting walnuts to Indian consumers through marketing activities that promote walnuts California origin, quality, taste and positive health benefits.

'Walnuts may help ward off diseases'

New Delhi: Eating a diet rich in walnuts may help prevent several diseases prevalent in India such as cardiovascular disorders, cancer and diabetes, according to an international team of researchers. Researchers and medical professionals from the field of Nutrition, Cardiovascular, Cognition, Alzheimer's and Diabetes today held a scientific meeting here to discuss the state of health in India, dietary patterns, chronic health conditions and promotion of healthy lifestyles.

A highly accomplished academic feast of International standards CWC holds scientific and health research meet on walnuts

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NEW FOR 2018

- New Market Exploration
 - UAE, Saudi Arabia and Malaysia
- New Market Segments
 - Halal product and recipe development





FOOD SAFETY MODERNIZATION ACT (FSMA) UPDATE

WHAT IS THE PSR?

- FDA's food safety law will require growers to do the following:
- **Water Testing:** Required for any water touching the produce (foliar spray for instance), hand washing, equipment washing.
 - **Surface water:** 20 tests over 2 years, 5/year thereafter
 - **Ground water:** 4 test in the first year, 1/year thereafter
- **Employee Food Safety Training**
- **Compost and Manure use** per the USDA NOP program

WHO IS COVERED UNDER PSR?

Farm Classification	Compliance Deadline
Very Small businesses (those with more than \$25,000 but no more than \$250,000 in average annual produce sales during the previous three year period)	Jan 2020
Small businesses (those with more than \$250,000 but no more than \$500,000 in average annual produce sales during the previous three year period)	Jan 2019
Large businesses (those with more than \$500K)	Jan 2018 (Compliance inspections Jan 2019)

WHO IS GOING TO DO THE INSPECTIONS?

- Not FDA. CDFA is contracted to do PSR inspections
- Inspection team called “Environmental Auditing Unit (EAU)”
- Inspections will start Jan 2019 for large (over\$500K) farms. State estimates there are approximately 25,000 large farms and they will have 9 inspectors. Goal is to conduct 200 to 300 inspections/year
- CDFA wants to inspect during harvest operations
- They are asking for “volunteer” farms to practice mock inspections in 2018

HOW DO YOU GET READY?

- FDA will pay CDFA \$450,000 in 2018 for grower training classes
- State will be split into 4 regions, 7 classes/region (one in Spanish)
- Each class is 8 hours for certificate (good for life per FDA)
- Walnut board contracted with DFA for 6 regional PSR trainings: January 22 (Modesto), February 9 (Yuba City), February 26 (Stockton), March 1 (Sacramento), March 15 (Tulare), March 22 (Chico)
- FSMA requires at least 1 person per farm to be trained

USDA STANDARD CHANGE

- Livermore (red walnuts) added to USDA standard.
- Livermore can now be marketed as US#1 or US#2
- Subject to assessments like other varieties



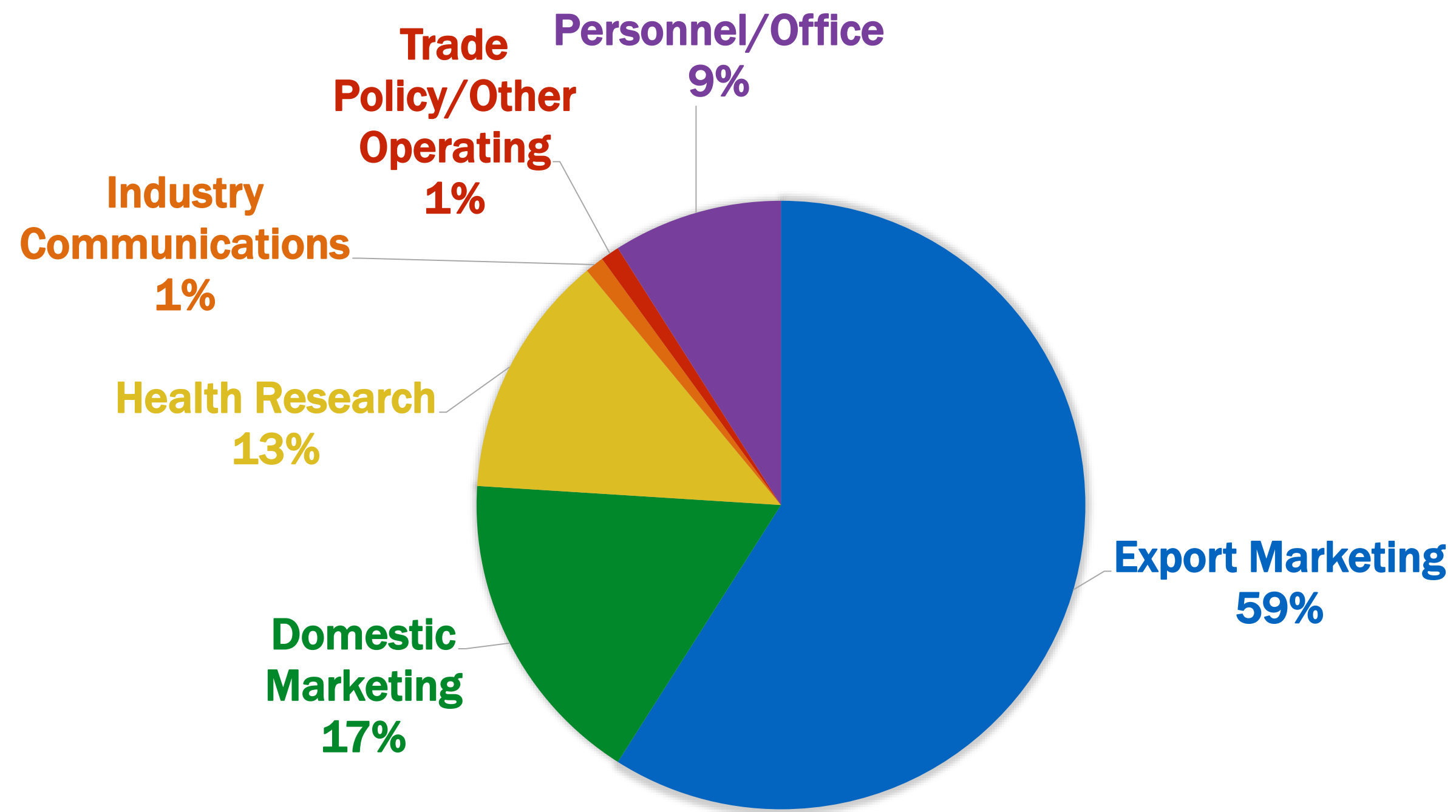
C A L I F O R N I A
W A L L N U T S

**RETURN ON
INVESTMENT**

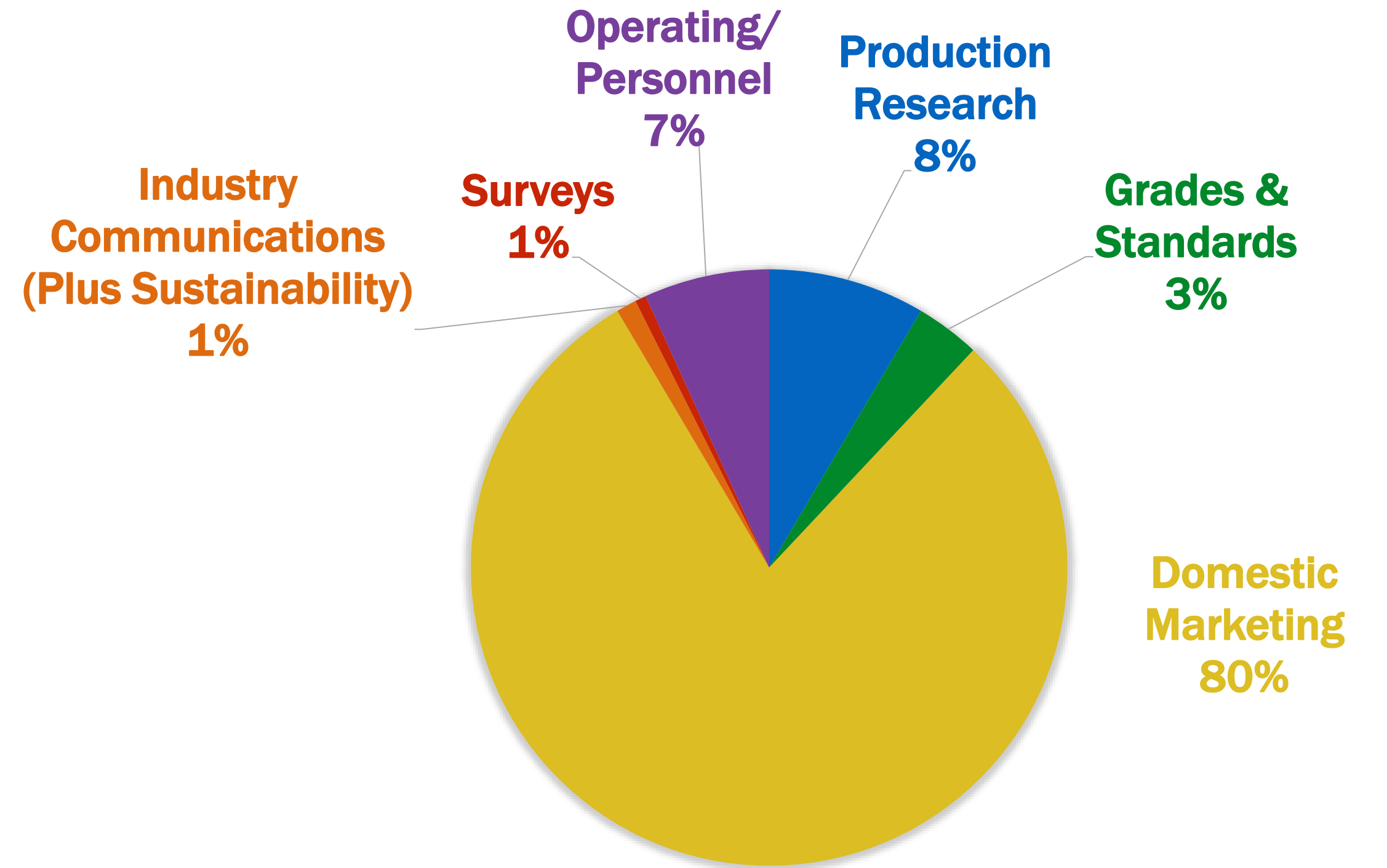


BUDGET ALLOCATIONS

**CALIFORNIA WALNUT COMMISSION
% OF BUDGET**

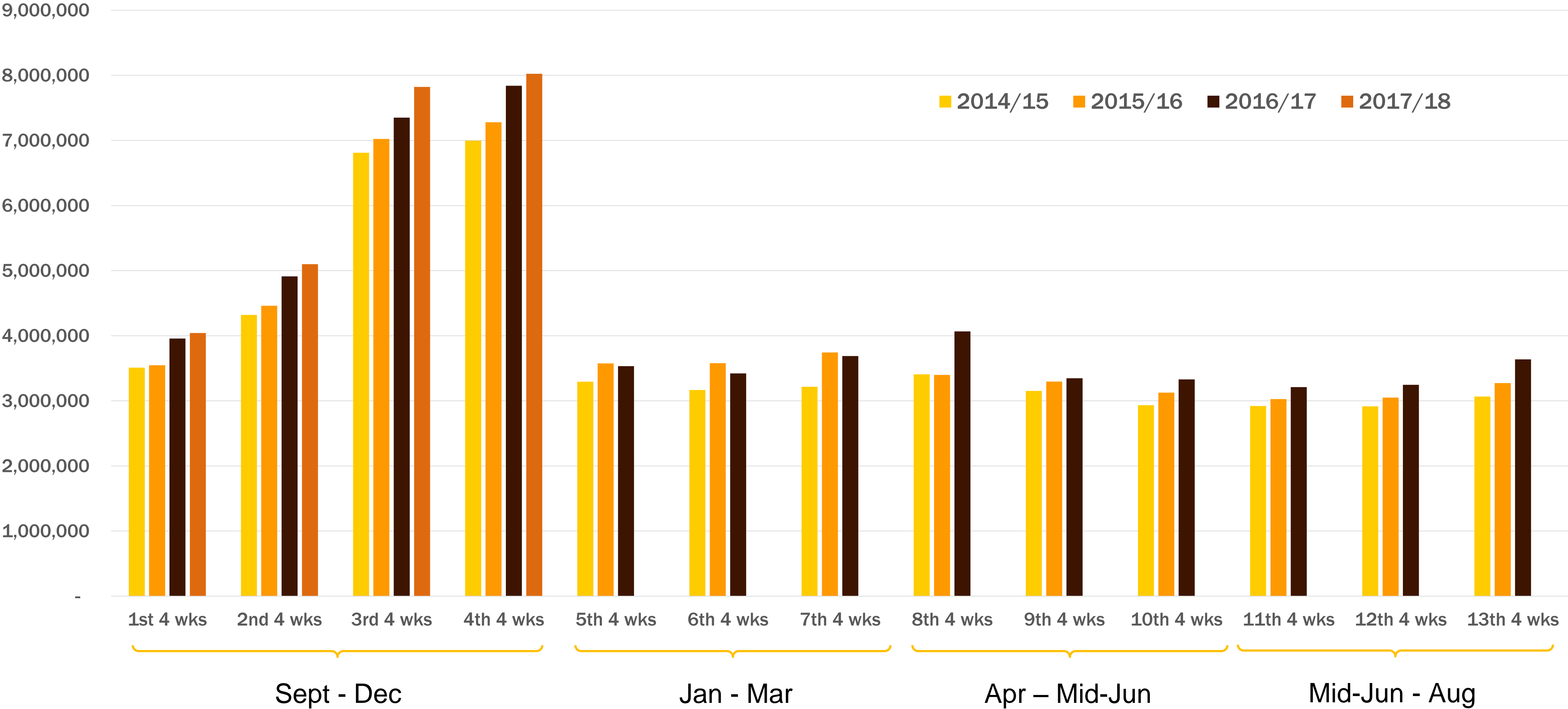


**CALIFORNIA WALNUT BOARD
% OF BUDGET**



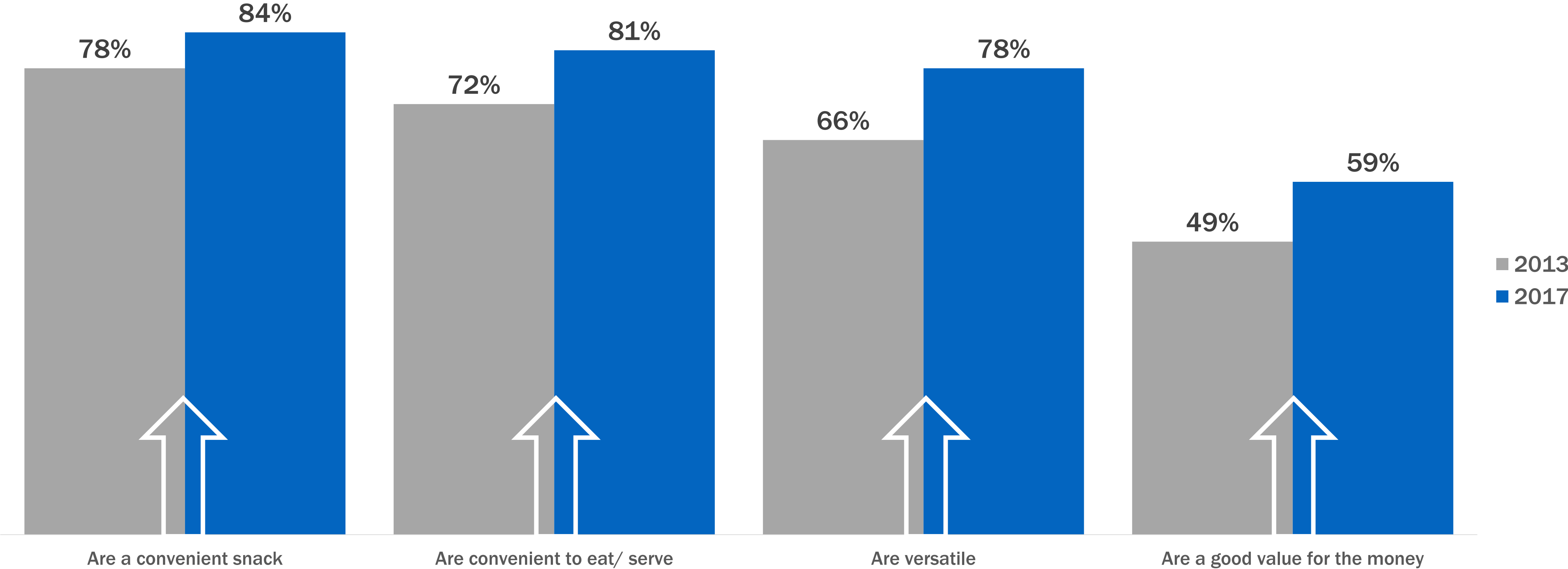
WALNUT RETAIL SALES YEAR-TO-DATE

Retail Sales Equivalent Pounds



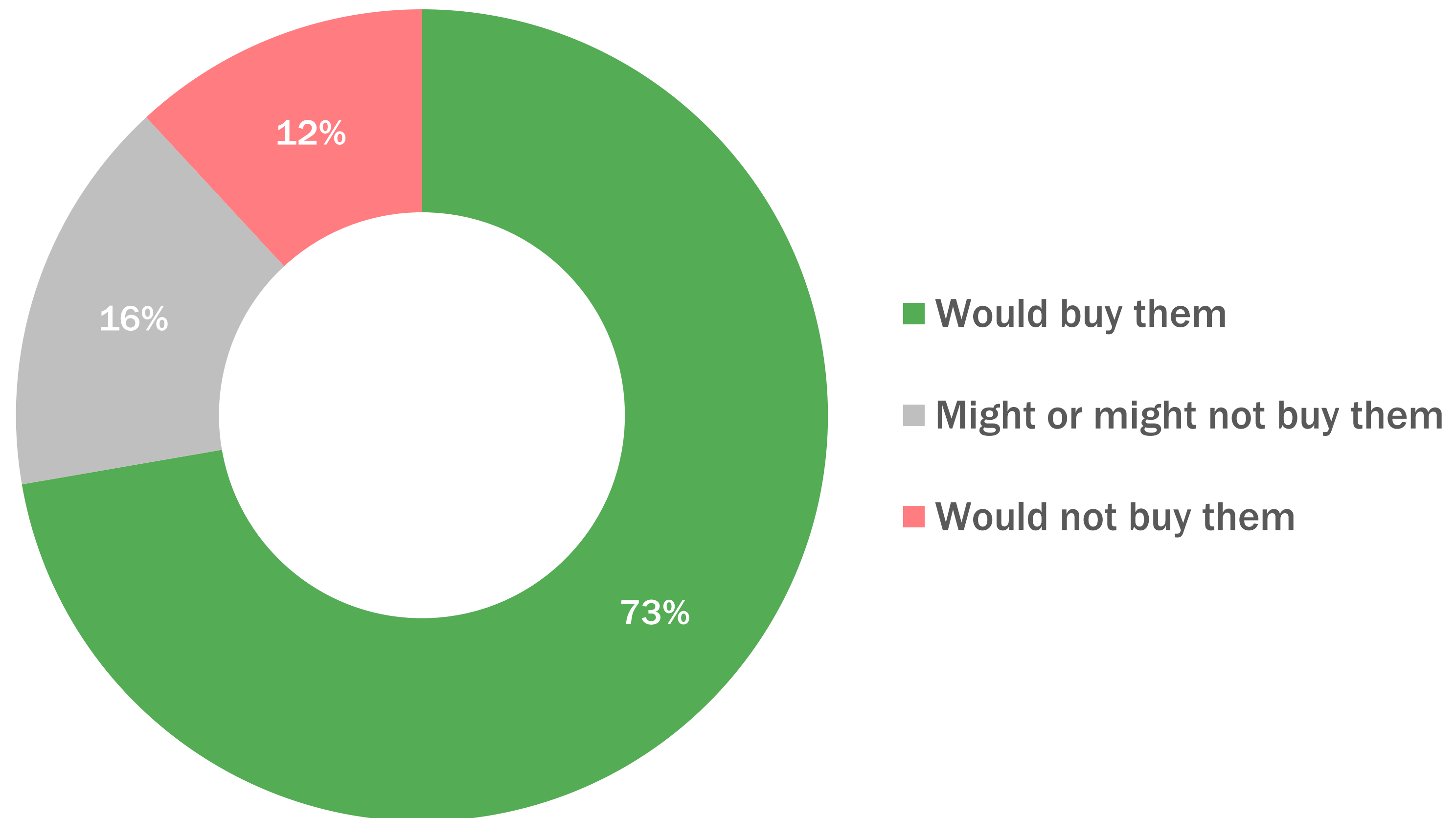
VALUE PERCEPTIONS OF WALNUTS

Perceptions of Walnuts – Convenience + Value



PURCHASE INTENT

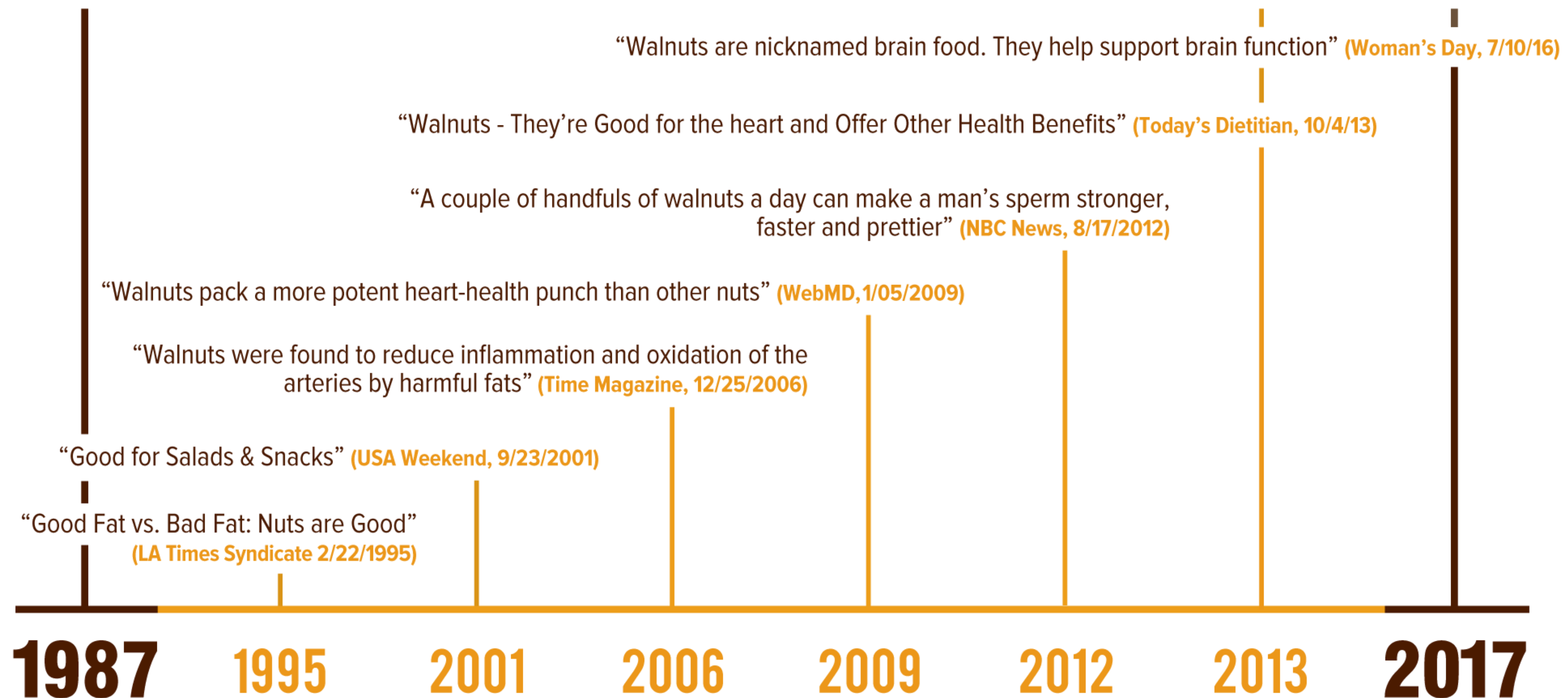
Likelihood to Purchase
Walnuts - Overall



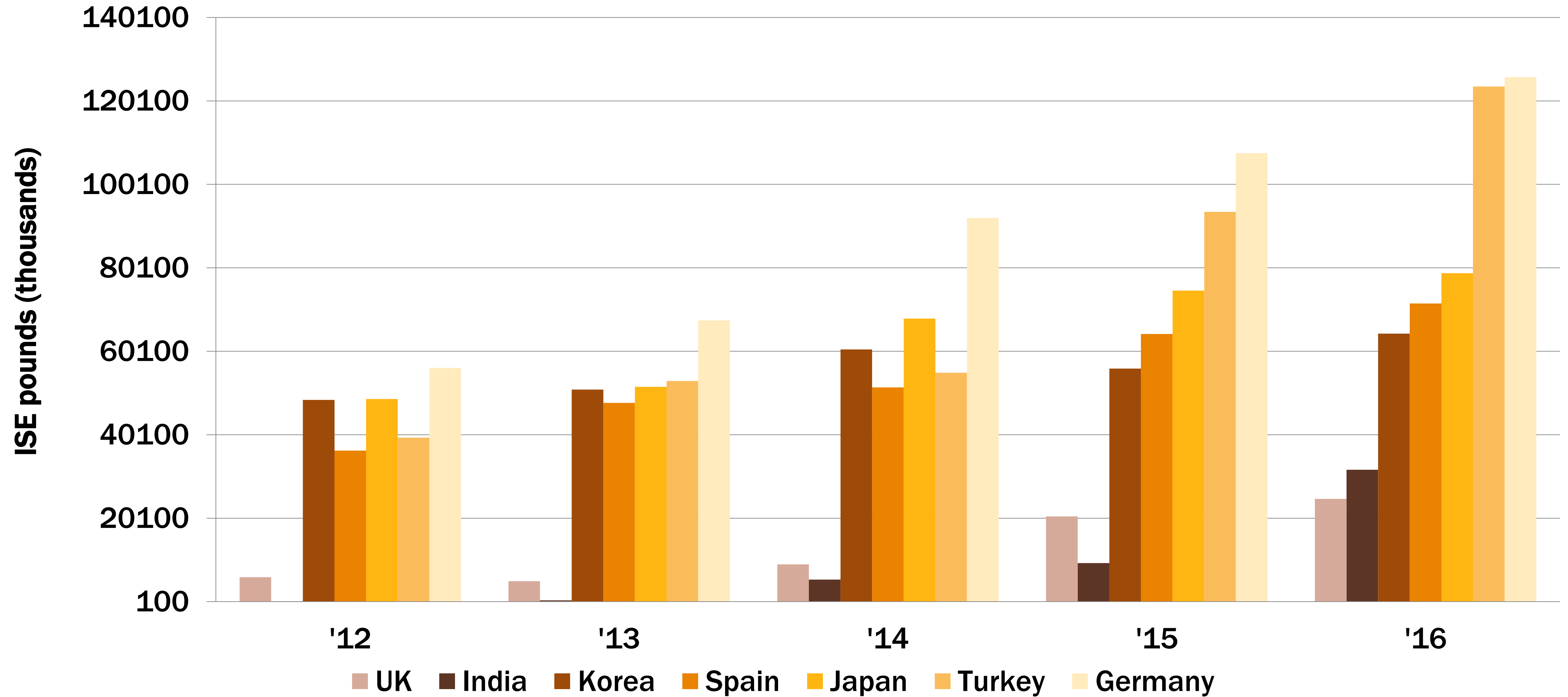
CONSUMER PERCEPTIONS OF HEALTH

0% ← CONSUMER BELIEF THAT WALNUTS ARE NUTRITIOUS → 92%

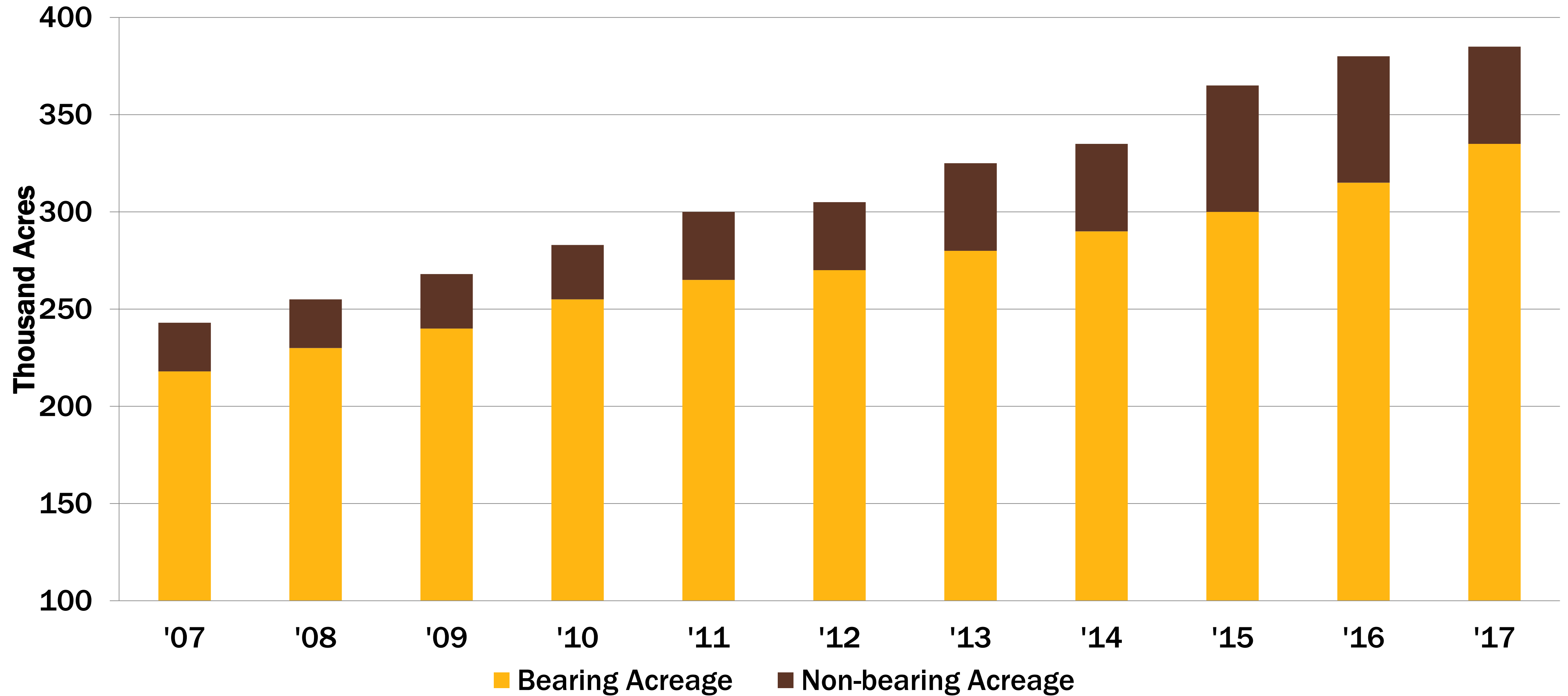
0% ← HEALTH BENEFITS OF WALNUTS IMPACTS PURCHASE DECISION → 82%



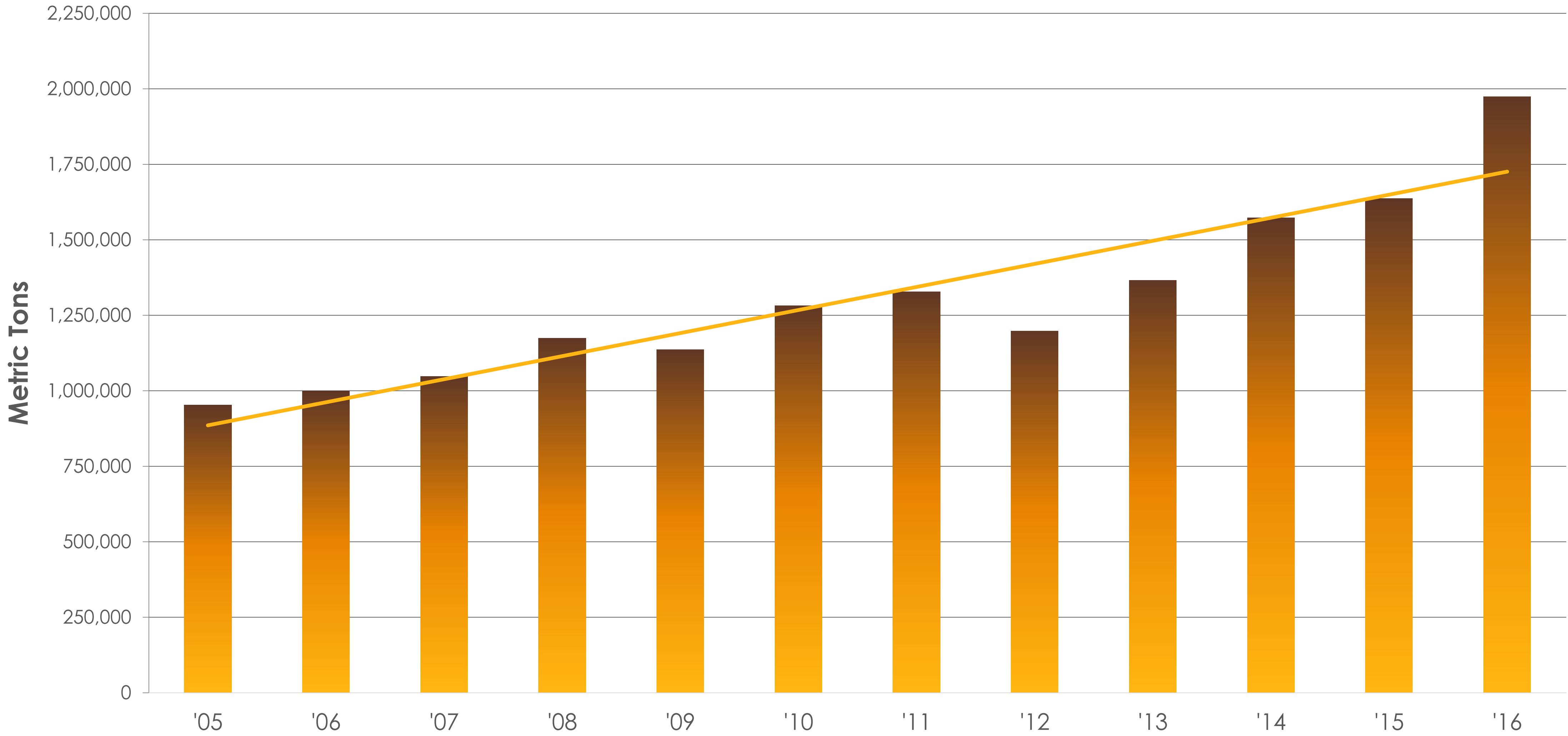
EXPORT RESULTS



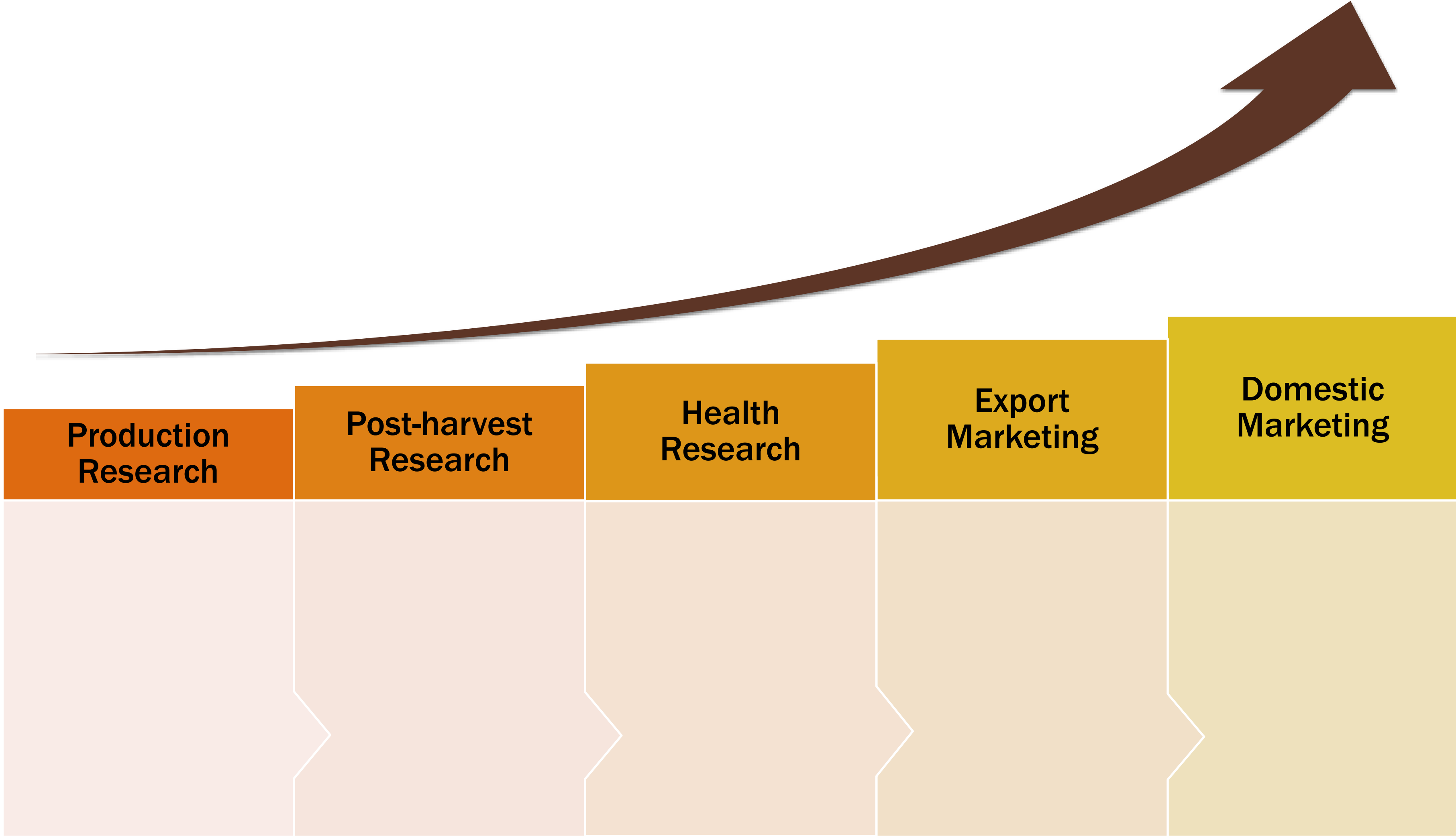
BEARING ACREAGE



WORLD PRODUCTION



TODAY, TOMORROW, & FUTURE



TODAY, TOMORROW, & FUTURE

New Markets

New Segments

New Customers

New Consumers

THANK YOU

C A L I F O R N I A

WALNUTS