



CALIFORNIA WALNUTS: An Industry Working Together



California Walnut Board & Commission



ONE INDUSTRY
WORKING TOGETHER
TO BUILD DEMAND
WORLDWIDE

WHAT IS WORKING TOGETHER?



- You the grower produce the highest quality
- Handlers supply and service the markets
- The Board & Commission
 - Fund Production Research
 - Direct the Health Research Program
 - Work to open new markets
 - Give you a regulatory voice
 - Increase use and usage among target audiences

KEY BOARD ACTIVITIES

- Production Research
- Food Safety
- Grades & Standards
- Regulatory Matters
- U.S. Marketing to Build Demand
- **Volume Control**

The Foundation of Success

KEY COMMISSION ACTIVITIES



- Health & Nutrition Research
- U.S. & International Market Development
- **Educate government officials**
 - Non-tariff trade barriers
 - Trade Policy (FTA)
 - Regulatory Issues
- Communication within the Industry

The Foundation of Success



PRODUCTION

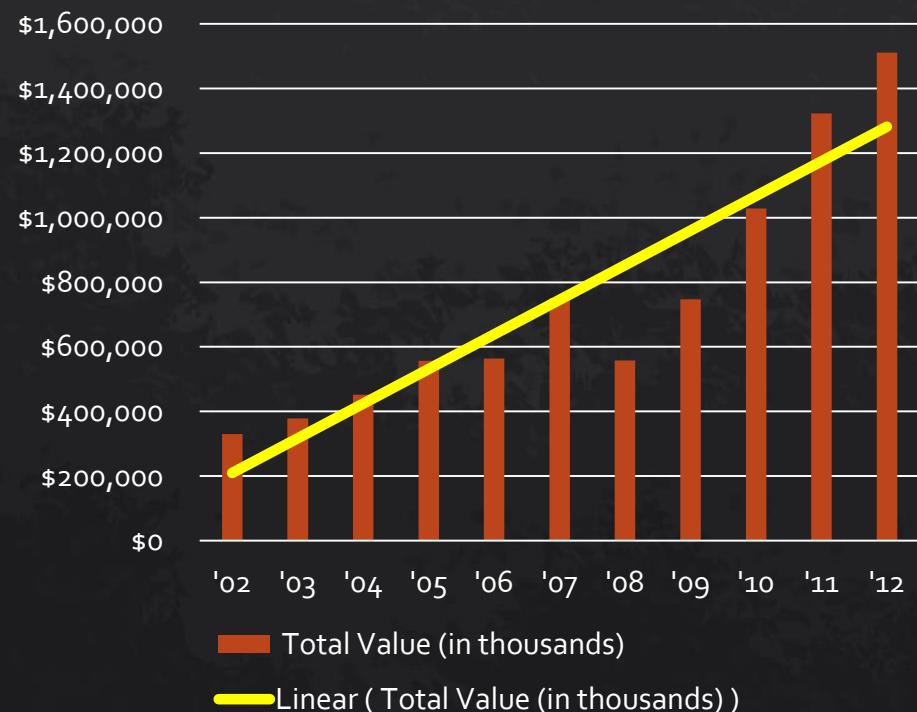


AVERAGE WALNUT PRICES

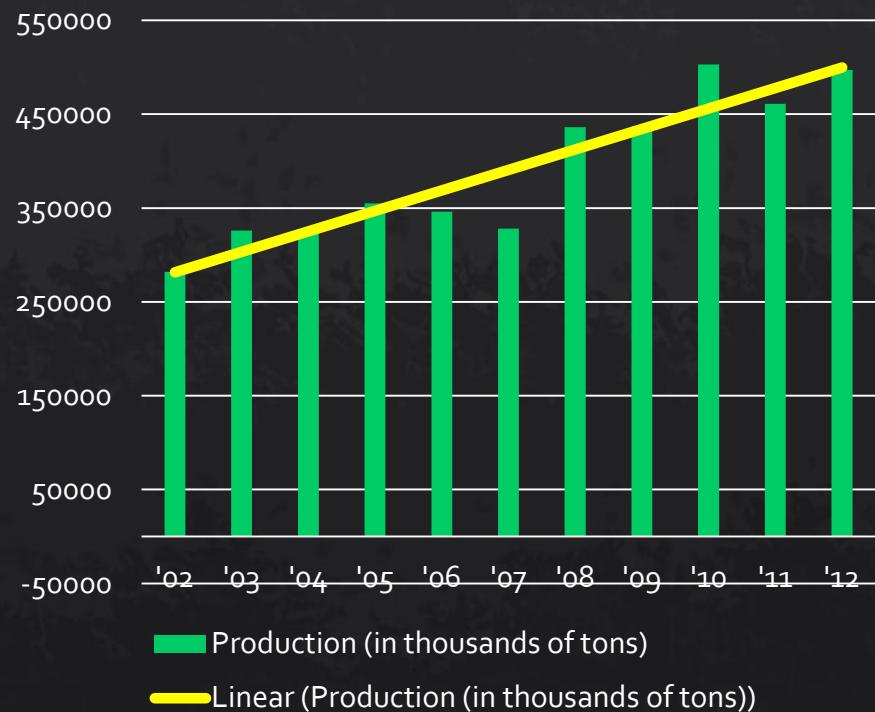


VALUE & PRODUCTION

Total Value

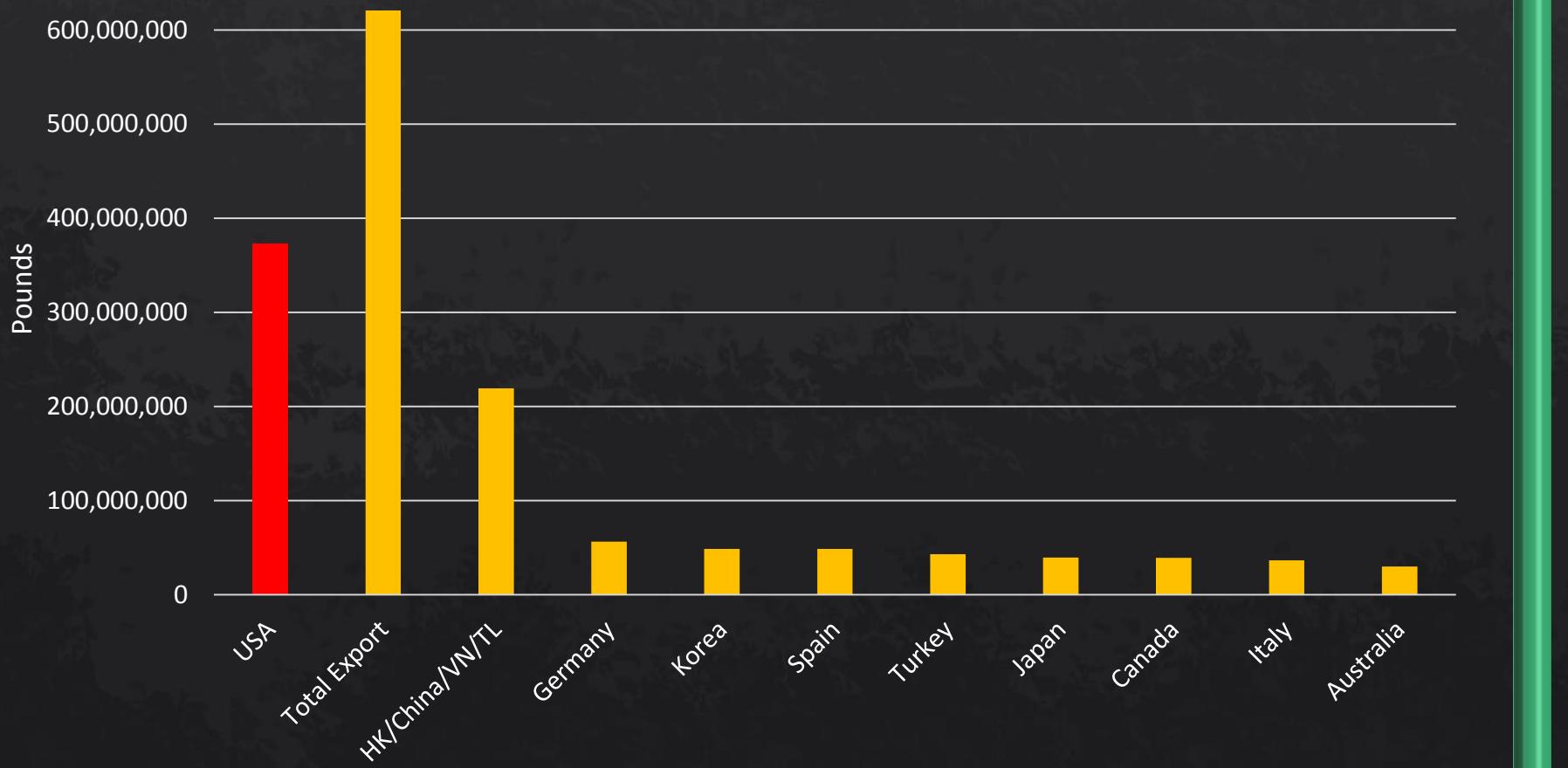


Production





2012 TOP MARKETS





Growing Our Industry



WORKING TOGETHER: PRODUCTION RESEARCH ACTIVITIES





2013/14 ACTIVITIES

21 Projects, \$1.5 Million focused on:

- Genetic Improvement: \$520,000
- Pathology/Nematology: \$400,000
- Orchard Management: \$390,000
- Entomology: \$273,000

UC Davis Endowment now at \$2 Million



WALNUT IMPROVEMENT PROGRAM

Resistant
Rootstocks

Molecular
Markers

Traditional
Breeding

PLANT BREEDING

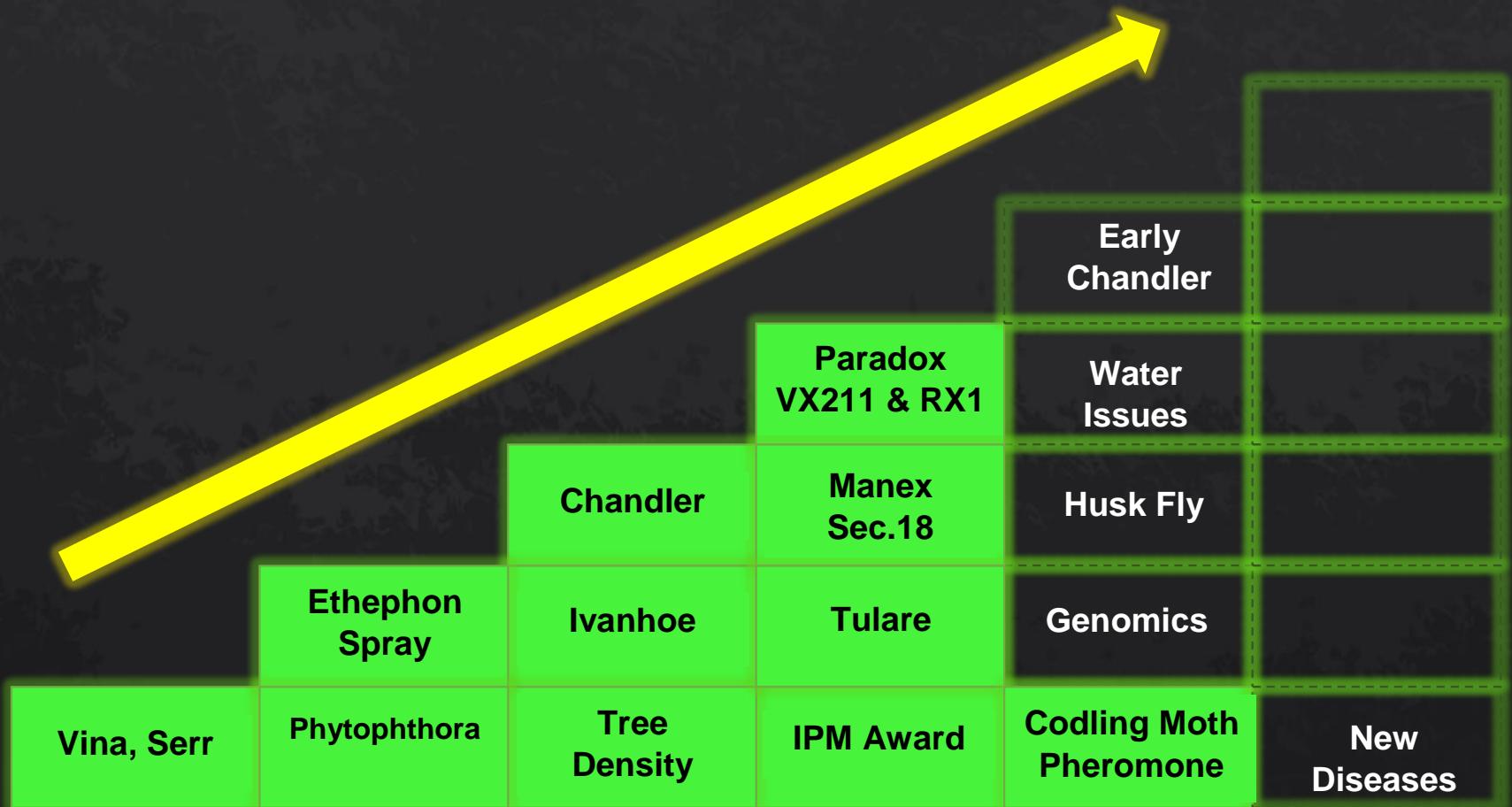


Chandler

Ivanhoe

Tulare

BUILDING DEMAND THROUGH PRODUCTION RESEARCH



A SUSTAINABLE INDUSTRY



- Systematic review of past 20 years
- Paper developed demonstrating progress
- Better use of sprays, softer products
- Progress in irrigation, pruning
- Coddling moth phermone
- Better rootstocks and varieties



WORKING TOGETHER: HEALTH RESEARCH





AREAS OF RESEARCH

- Cardiovascular
- Cancer
- Cognition
- Diabetes
- Male Reproductive Health
- Weight Management
- Antioxidant Properties

120+ Papers Published



HEALTH RESEARCH

First study
Loma Linda
NEJM

Scientific
Advisory Council
('95)

FDA Health Claim
1.4 billion
impressions



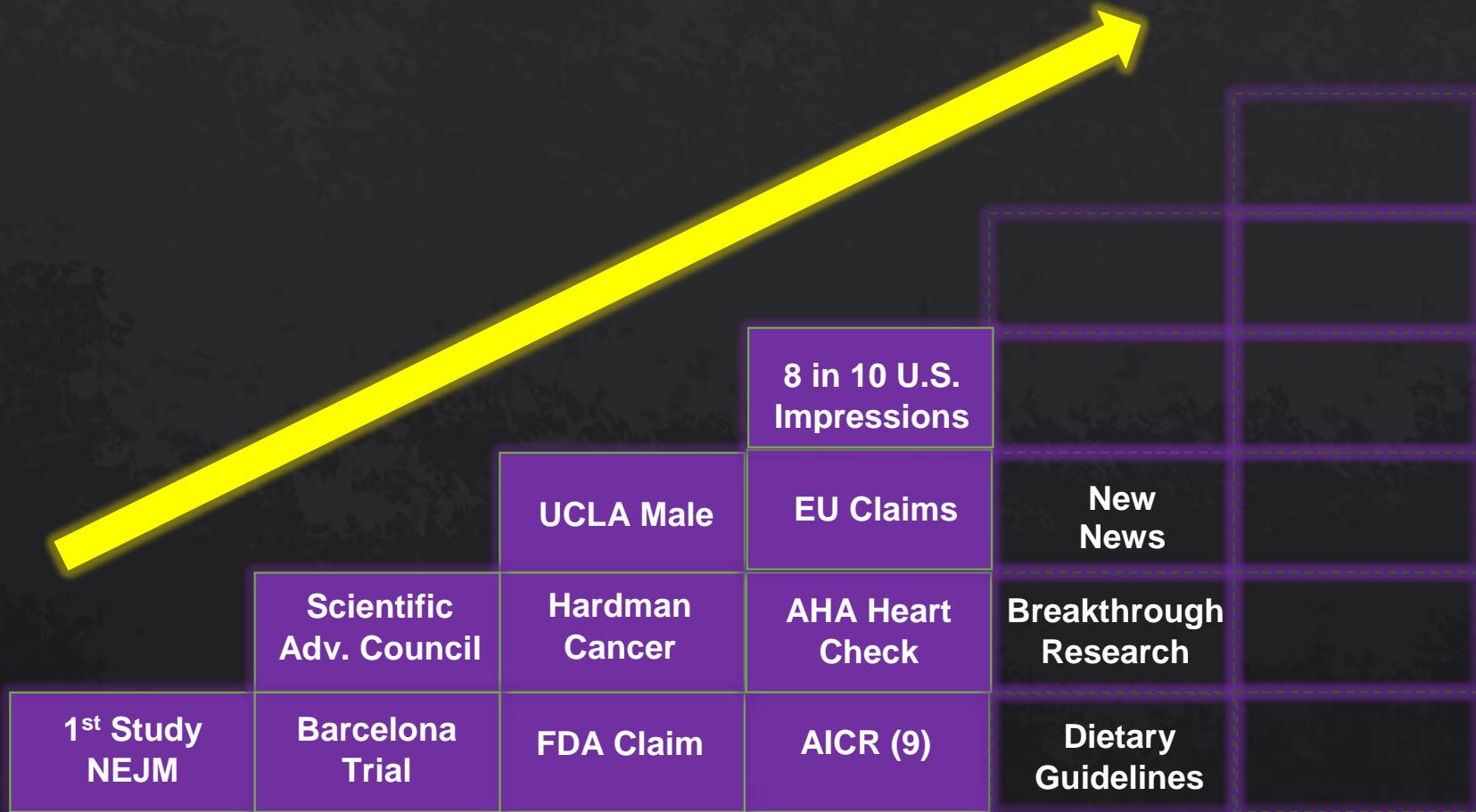
HEALTH RESEARCH

1st AICR
Grant ('05)

AHA Heart-
Check

EU Health
Claims

BUILDING DEMAND THROUGH HEALTH RESEARCH



CHANGE IN CONSUMER PERCEPTIONS



1987 – 0% purchased walnuts for their health benefits

2013 – 84% believe walnuts are healthy & health is the #1 reason for purchase





WORKING TOGETHER: MARKET DEVELOPMENT



KEY ACTIVITIES

- Build Demand in Existing Markets
- Evaluate and Prioritize Markets
- Opening New Markets
- Supplement Industry Funds
 - Market Access (MAP) and other federal grant programs

MARKET DEVELOPMENT



Japan NPDC

German
Discounters

Korea Inshell
Access

MARKET DEVELOPMENT

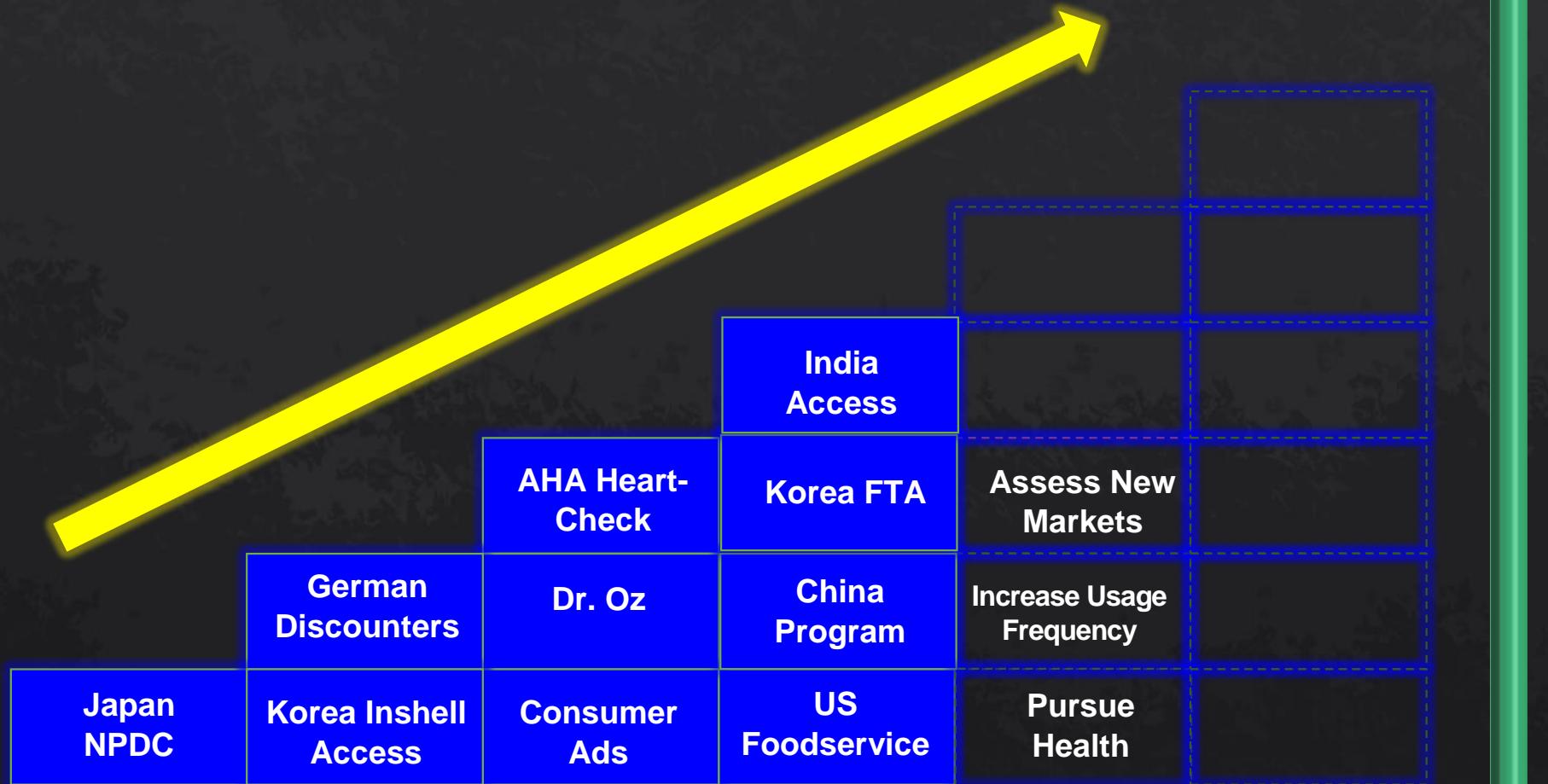


China
Program
Begins

Korea FTA

India Access

BUILDING DEMAND THROUGH MARKET DEVELOPMENT





MARKETING TACTICS

Public Relations

Advertising

Partnerships

Media Events

Trade Promotion

Bakery Tie-Ins

Social Media



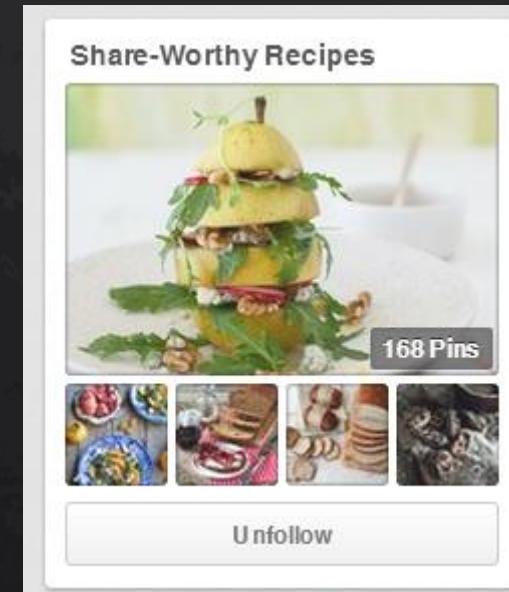
Food Service Promotions

Opinion Leader Outreach

Retail Promotions

U.S. USAGE PROGRAM

- “Simple Goodness” Social Media Campaign
 - Focus on simple every day uses
 - Short how-to videos
 - Recipe contest “How do you use walnuts?”



U.S. HEALTH PROGRAM

- Academy of Nutrition & Dietetics show
 - 8,000+ dietitians
 - Book signing & RD video
 - Media Dinner
 - 1150 E-newsletter sign-ups





NEW! U.S. FOODSERVICE PROGRAM

- Walnut Summit at the Culinary Institute of America
- Foodservice Promotions
- Advertising



TRENDING >>
SUSTAINABLE SEAFOOD

WALNUT PANKO CRUSTED CHILEAN SEA BASS california walnuts | wild rice | chimichurri

In your business, if you're not staying abreast of the latest food trends, you're falling behind your competition. One trend that's caught on big is cooking with wholesome ingredients like California Walnuts. Adding walnuts is a great way to add natural taste and texture. And an even better way to keep you on-trend.

For more visit: Walnuts.org

CALIFORNIA
Walnuts

INDIA



■ Trade Advertising

CHINA

■ Social Media Engagement



#美国加州核桃早餐计划# 一个人吃早餐是好好爱自己，两个人吃早餐是且行且珍惜。为自己或者朋友同事送上一份美国加州核桃协会精心准备的营养早餐吧，让寒冷的早晨充满浓浓的爱意❤️ 立刻报名参加我们的活动，就有机会在11.26日从猛男手上收到一份美国加州核桃三明治哦（仅限上海）<http://t.cn/8DFGVX8>

▲ 收起 | ▲ 查看大图 | ▶ 向左转 | ▶ 向右转

美国加州核桃协会 健康早餐免费送

和同事 分享营养早餐 送朋友 一份美味早餐

现场领取 @美国加州核桃协会 weibo.com/Californiawalnuts

11月15日 12:06 来自新浪微博 阅读(21.4万) 推广 | (2) 转发(4488) | 收藏 | 评论(1736)

KOREA

- Opinion Leader Outreach



Korean Nutrition Society



CALIFORNIA WALNUTS



DEMAND

THERE'S STILL MORE WORK TO DO

- Good Inventory Position
- Only reached one-third of domestic consumption potential
- Building new export markets
- Expand health research program

Continuation Referendum

- First Time – Result of 2008 Order revision
- One simple yes or no vote on the ballot
- Vote to continue operation of the Board
- Ballots to be mailed March 31, 2014 by USDA's Agricultural Marketing Service
- Ballots must be postmarked no later than April 19, 2014

Walnuts.org

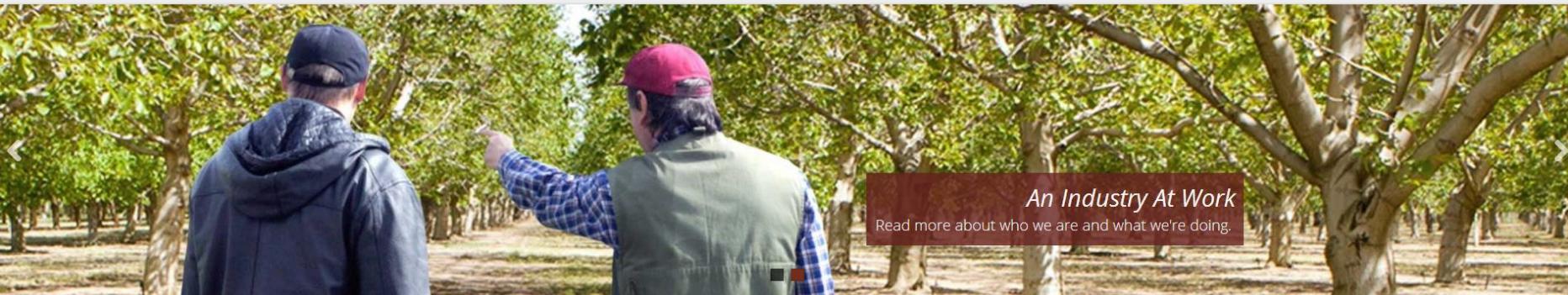


About Us News Media Center Events Resources



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An Industry At Work

Read more about who we are and what we're doing.

Walnut Industry

Did you know? The California Walnut Board, established in 1948, and the California Walnut Commission, established in 1987, represent the interests of the 4000+ walnut growers and the nearly 100 handlers spread across California's Central Valley. The industry generates \$1.4 billion in farm gate revenue and supports some 60,000 jobs directly and indirectly.





THANK YOU!

California Walnut Board & Commission

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Folsom, CA 95630

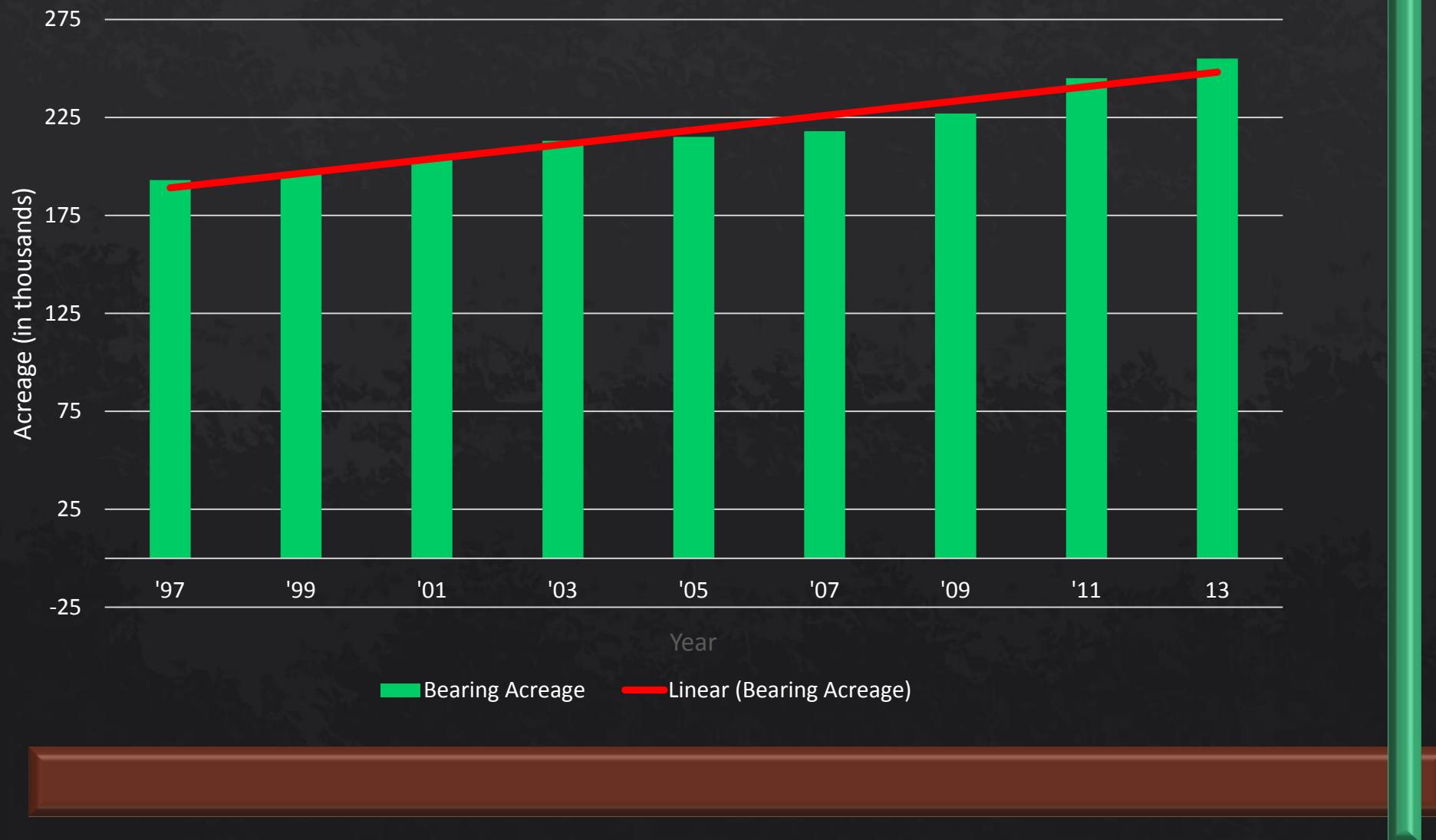
(916) 932-7070

www.walnuts.org

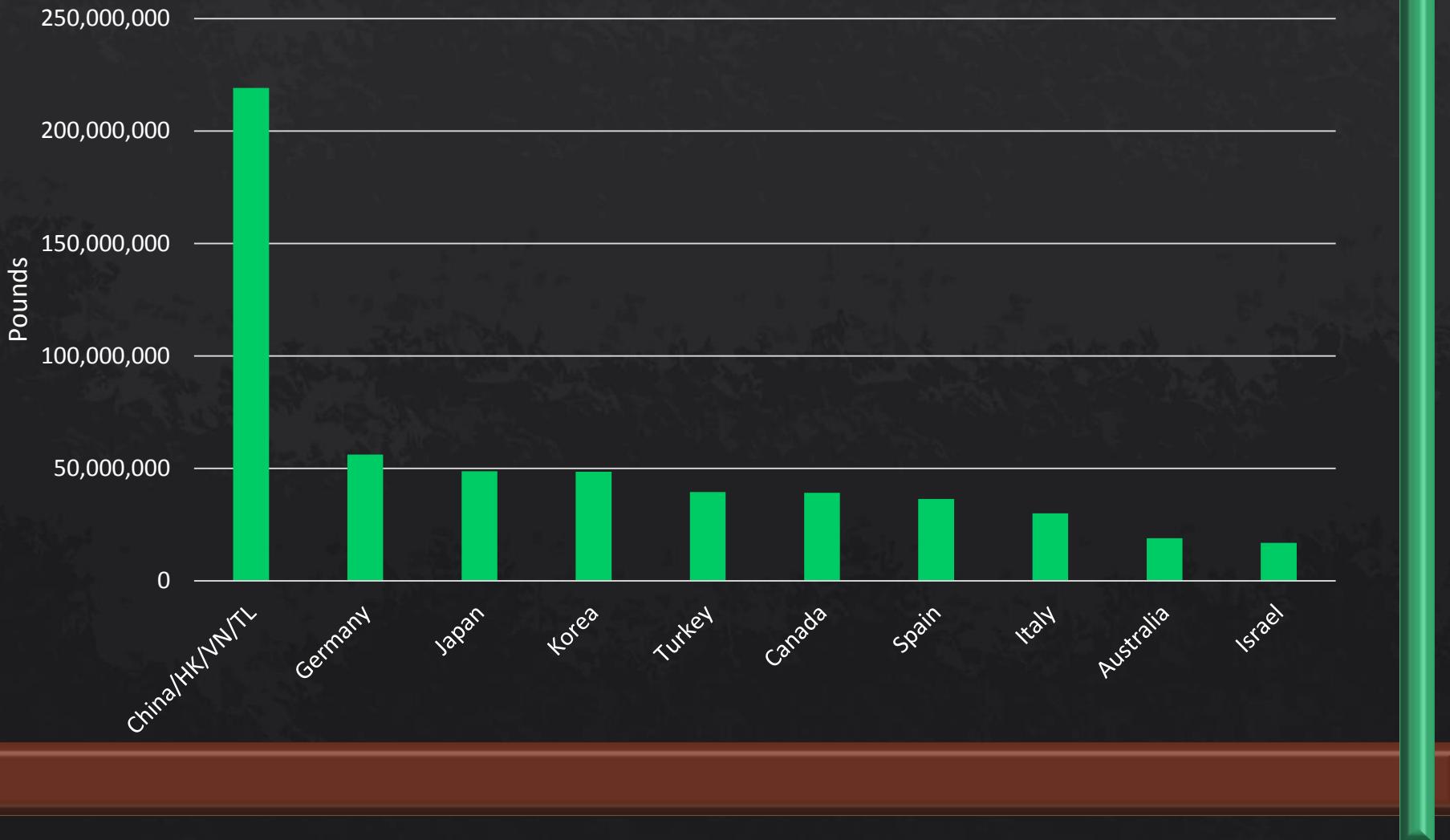


APPENDIX

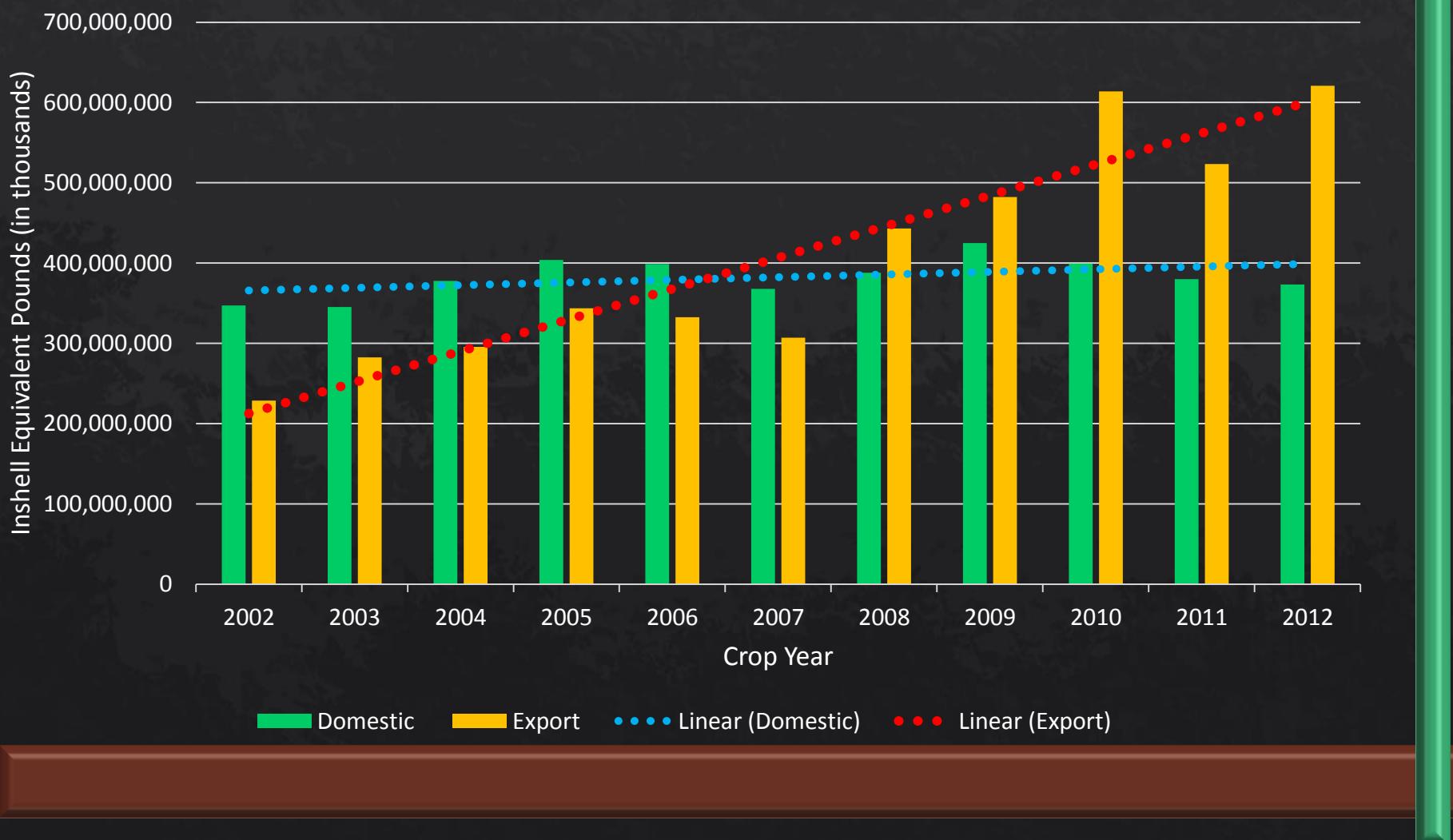
BEARING ACREAGE



2012 TOP EXPORT MARKETS



DOMESTIC & EXPORT SHIPMENTS



SUSTAINABLE AGRICULTURE



The term "sustainable agriculture" means an integrated system of plant and animal production practices having a site-specific application that will over the long-term:

- Satisfy human food and fiber needs.
- Enhance environmental quality and the natural resource base upon which the agriculture economy depends.
- Make the most efficient use of nonrenewable resources and on-farm resources and integrate, where appropriate, natural biological cycles and controls.
- Sustain the economic viability of farm operations.
- Enhance the quality of life for farmers and society as a whole.

U.S. OPTIMIZED HEALTH PERCEPTION



Mediterranean diet may be better for your heart than cutting down on fat. "The Mediterranean diet is rich in "healthy fats" like omega-3 fatty acids found in walnuts, but is low in saturated fats from fried foods." (CBS News, 2/25/2013)

Walnuts: The Original Health Nut

"Studies show regular walnut consumption is associated with lowering bad cholesterol, raising good cholesterol and lowering risk for heart disease. In animal studies, walnuts have even been associated with slowing breast cancer growth." (NYTimes.com, 10/02/2009)

"Need a Snack?

Walnuts were found to reduce inflammation and oxidation of the arteries by harmful fats, which can lead to heart disease." (Time Magazine, 12/25/06)

Good for Salads & Snacks
(USA Weekend, 9/23/01)

Nuts & Fat are Bad!
(Newsday, 12/23/90)

1990

1995

2001

2006

2012

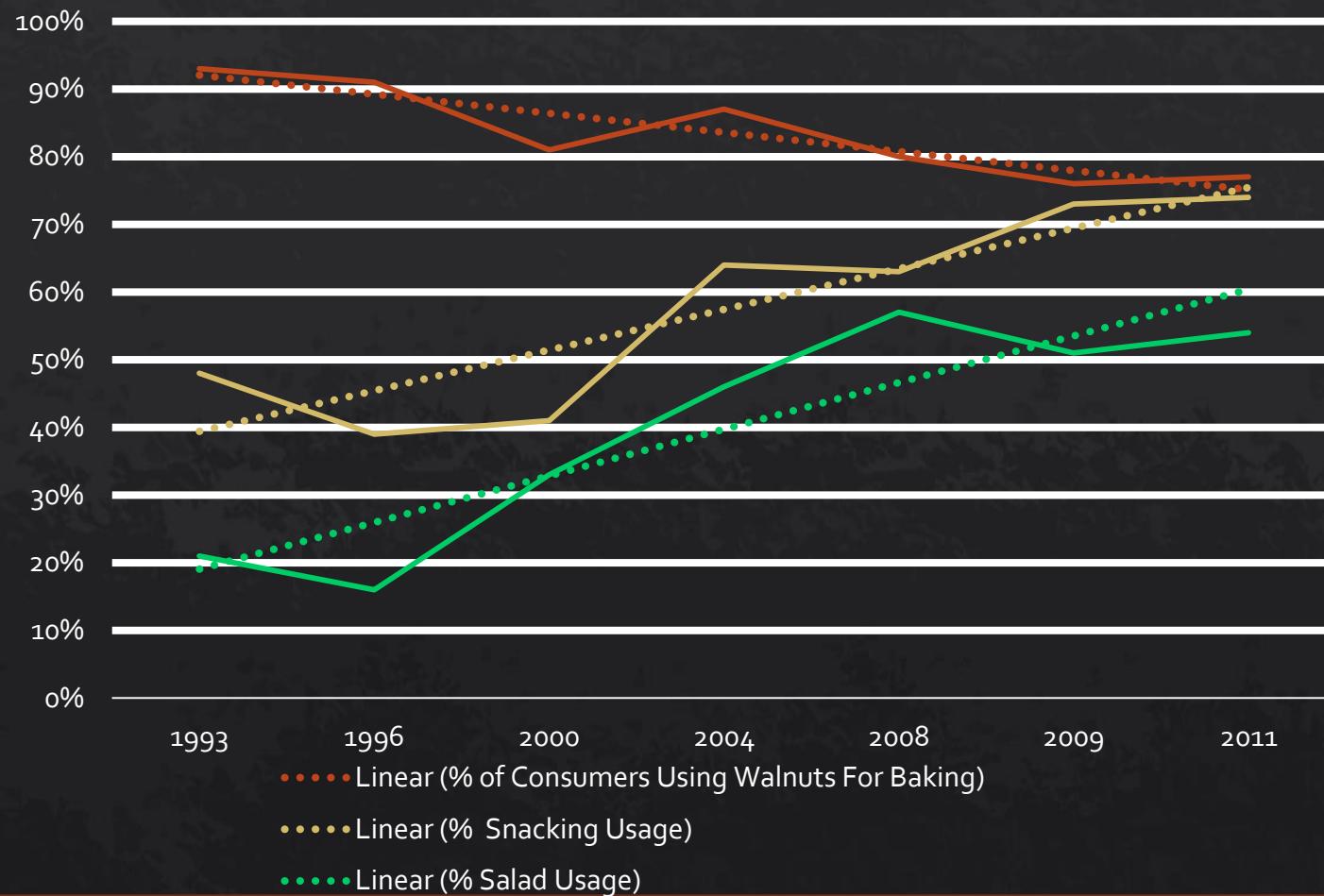
2013

Good Fat vs. Bad Fat: Nuts are Good
(LA Times Syndicate 2/22/95)

Eating walnuts daily can give sperm an extra kick. "A couple of handfuls of walnuts a day can make a man's sperm stronger, faster and prettier, researchers said – and it's possible the nuts could provide a natural solution for some men with fertility problems." (NBC News, 8/17/2012)

A Good Reason to Be Nuts About Walnuts
"Walnuts pack a more potent heart-health punch than other nuts." (WebMD, 1/05/12)

U.S. CONSUMER PERCEPTIONS



MARKETING IN THE U.S.

BOARD

- PR on Taste Messaging
- Consumer Advertising
- Website
- Social Media
- Foodservice
- Market Research
- Sponsorships
(HealthCorps, DFA, Ag in the Classroom, Center for Land-Based Learning, etc)

COMMISSION

- PR on Health Benefits and Research Studies
- Key Opinion Leaders
- Tradeshows & Conferences
- Health Professional Advertising
- Health Professional Outreach
- Industry Outreach