

# CALIFORNIA WALNUTS: An Industry Working Together



California Walnut Board & Commission

A large, stylized globe with a grid of latitude and longitude lines is centered in the background. Above the globe, five green arrows of varying heights point upwards, symbolizing growth or progress.

**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*

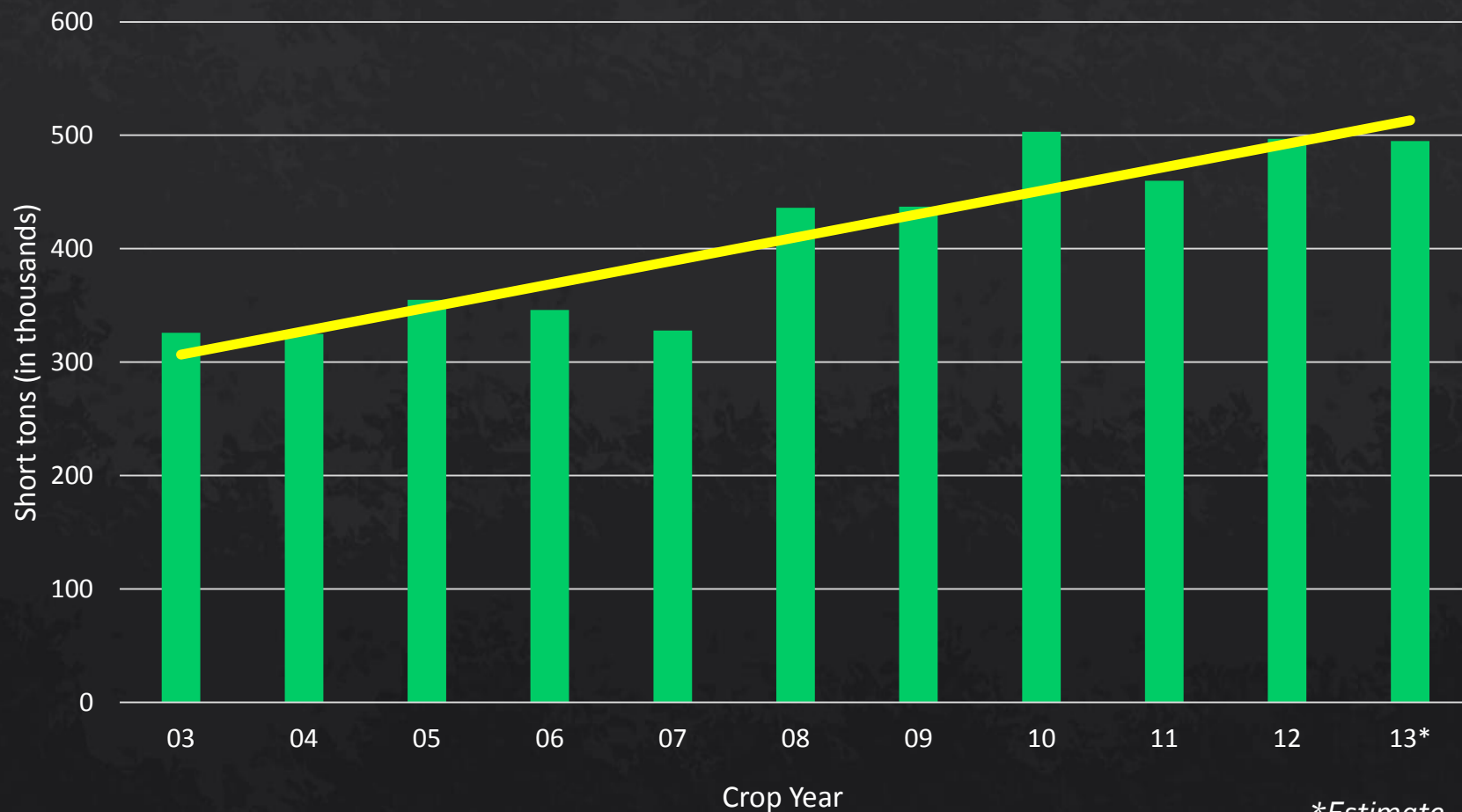
# KEY COMMISSION ACTIVITIES



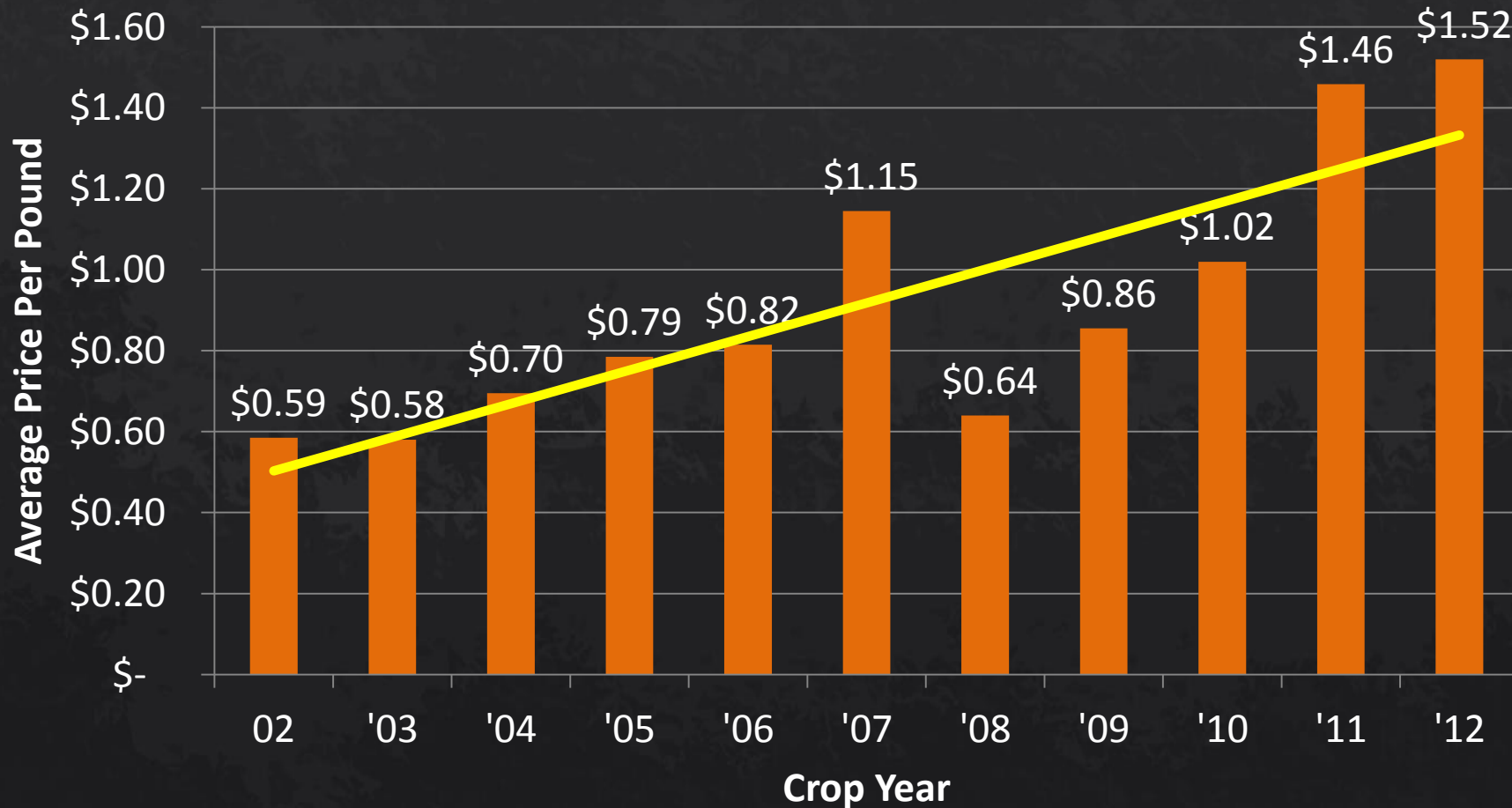
- Health & Nutrition Research
- U.S. & International Market Development
- Educate government officials
  - Non-tariff trade barriers
  - Trade Policy (FTA)
  - Regulatory Issues
- Communication within the Industry

*The Foundation of Success*

# PRODUCTION



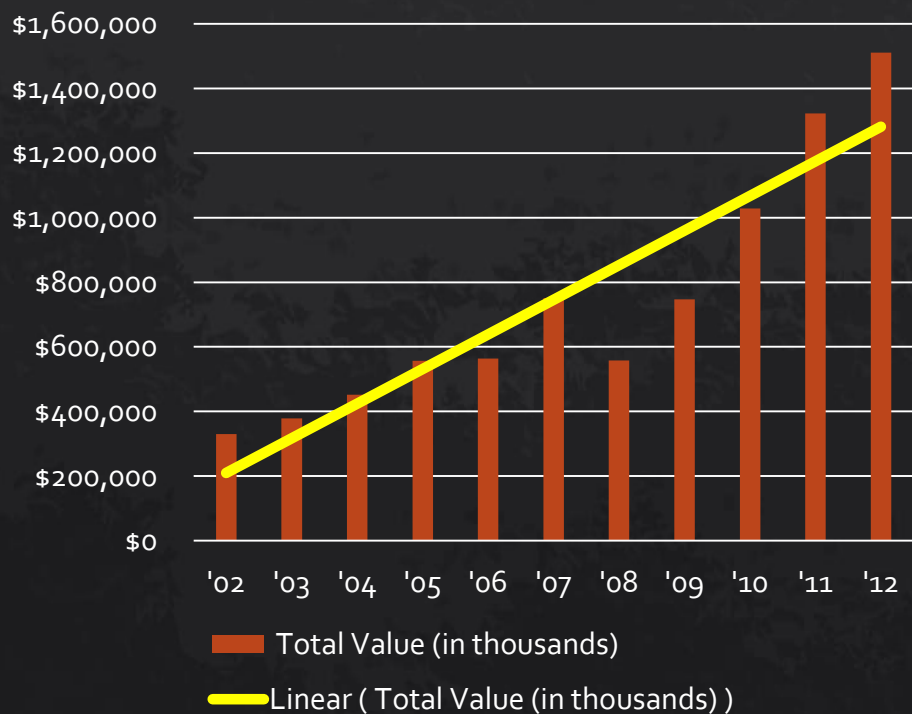
# AVERAGE WALNUT PRICES



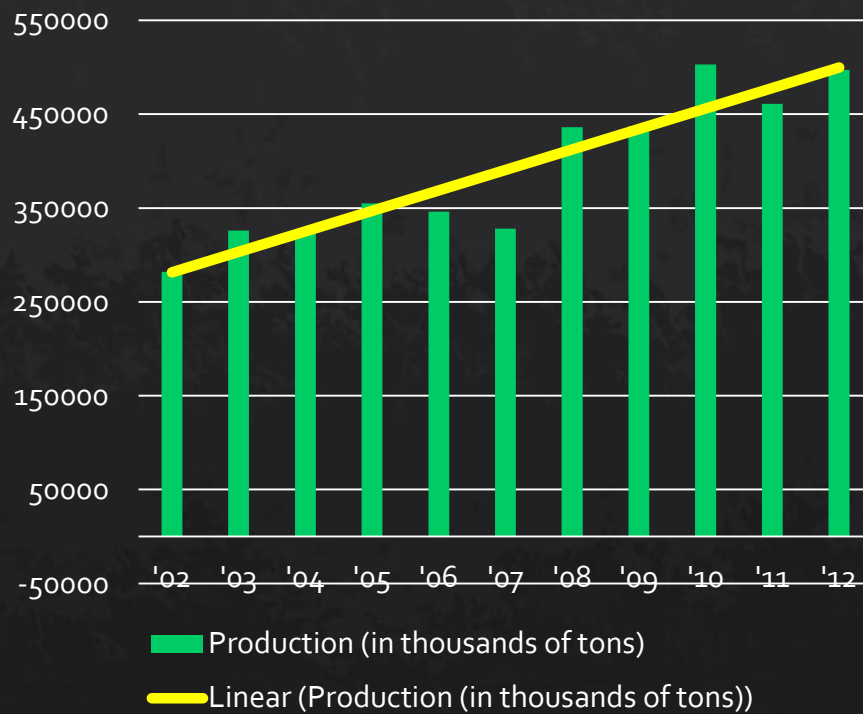


# VALUE & PRODUCTION

## Total Value

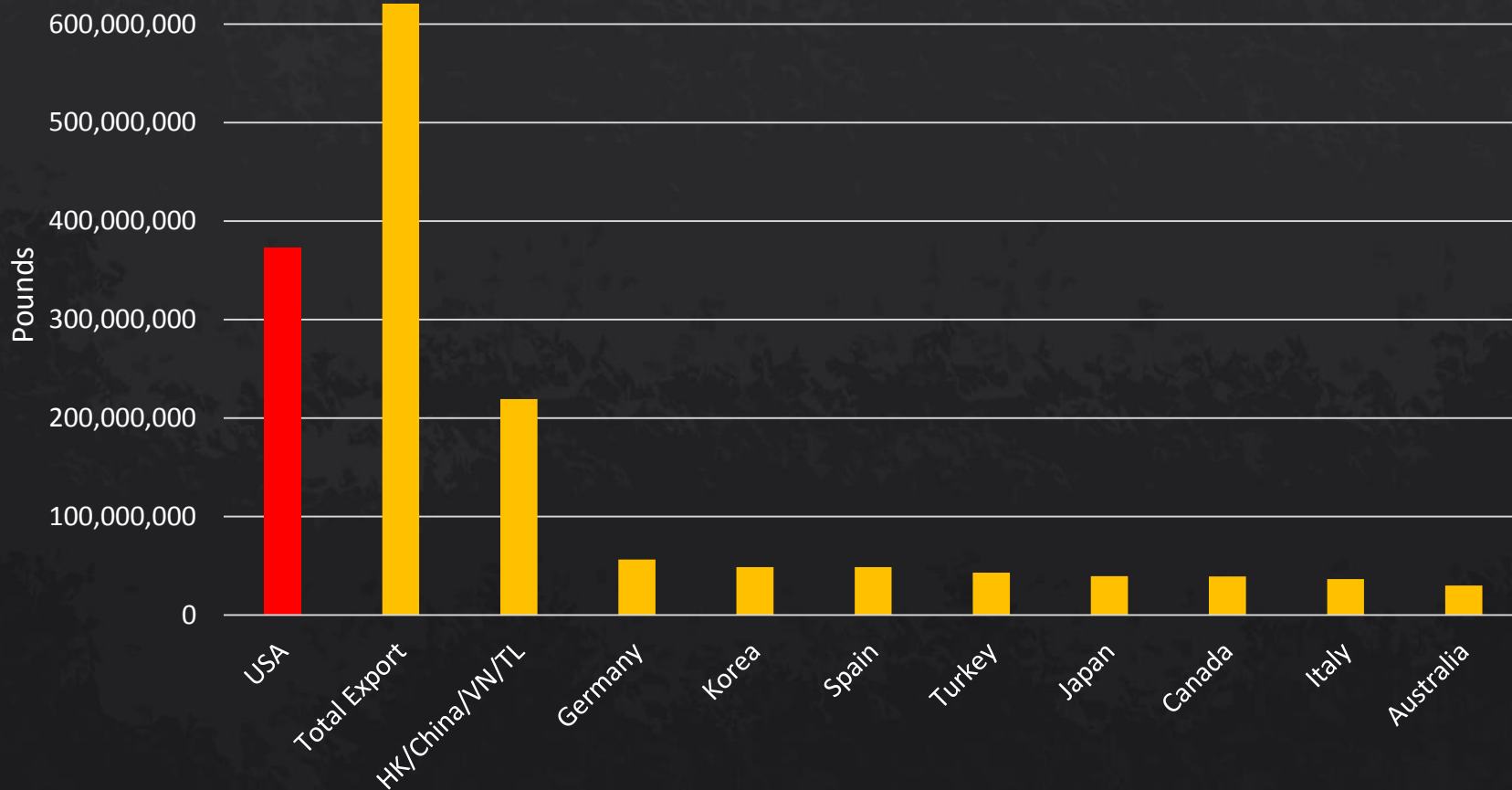


## Production





# 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  
Rootstalks

Molecular  
Markers

Traditional  
Breeding

# PLANT BREEDING

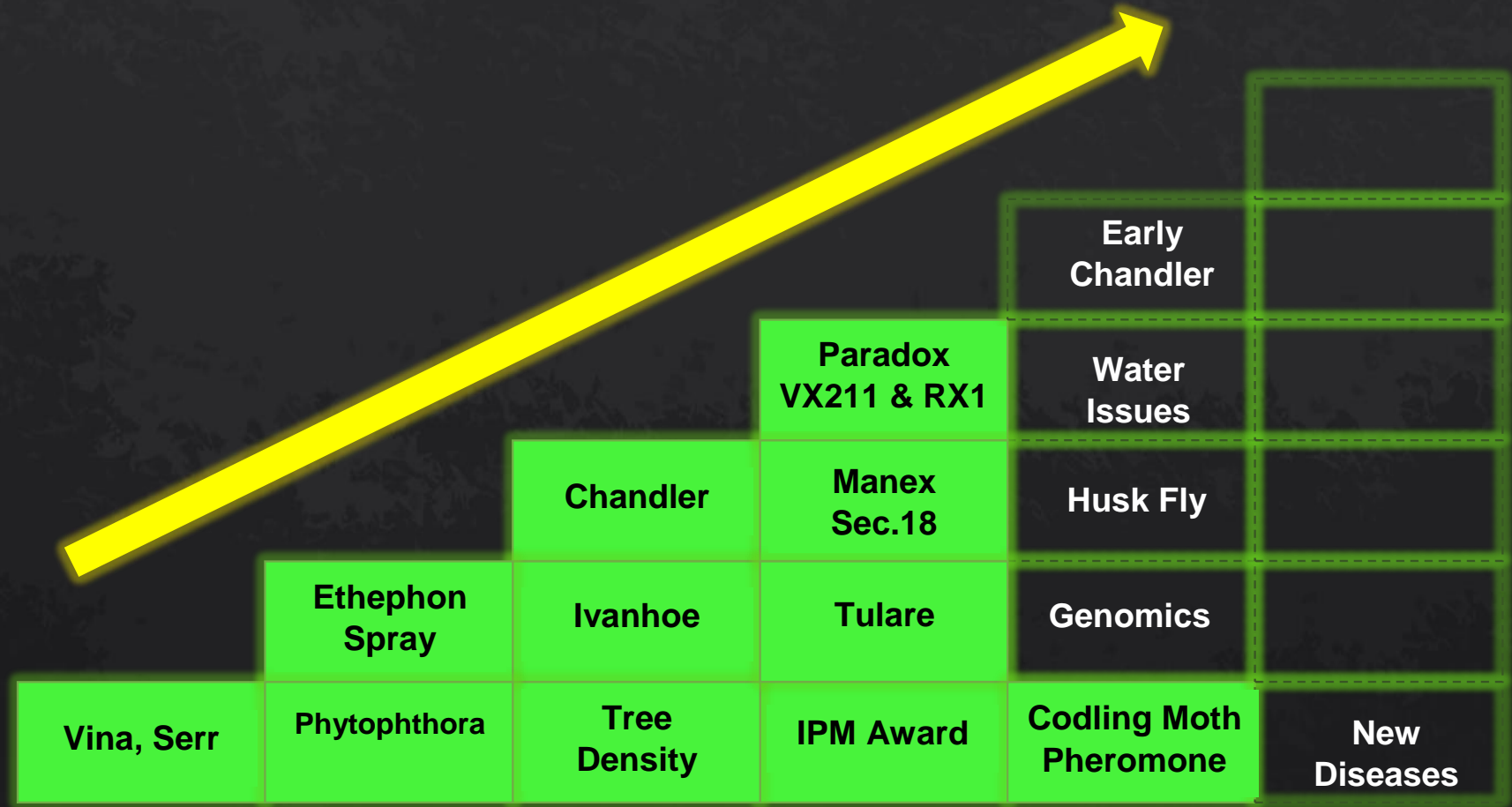


Chandler

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

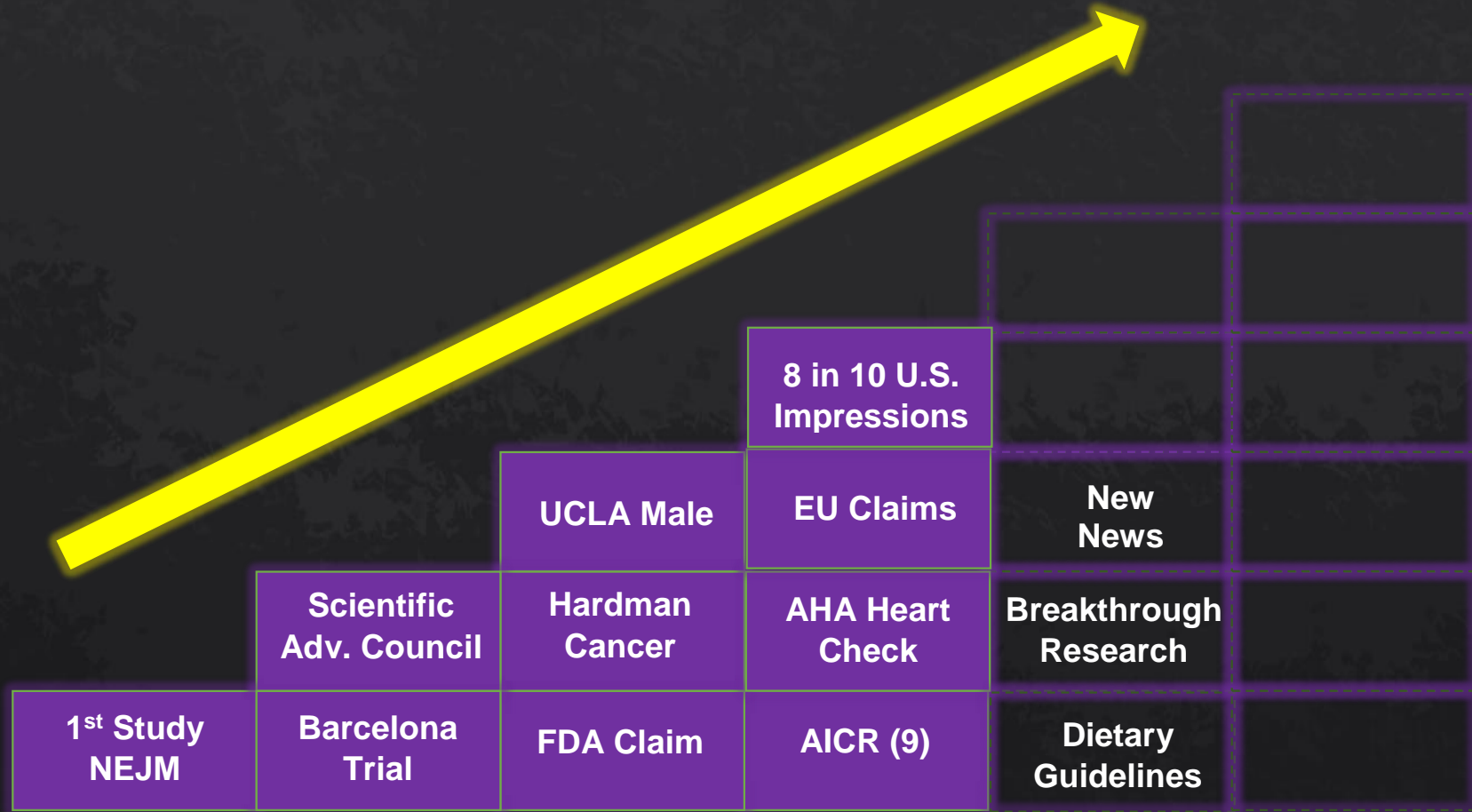


1<sup>st</sup> AICR  
Grant ('05)

AHA Heart-  
Check

EU Health  
Claims

# BUILDING DEMAND THROUGH HEALTH RESEARCH



# CHANGE IN CONSUMER PERCEPTIONS



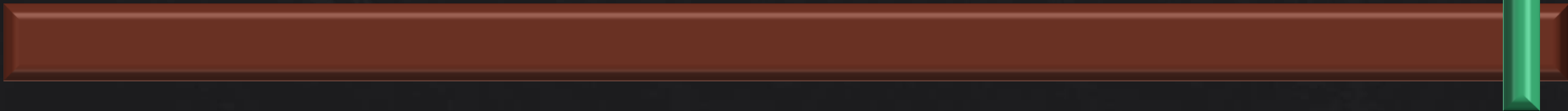
1987 – 0% purchased walnuts for their health benefits

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

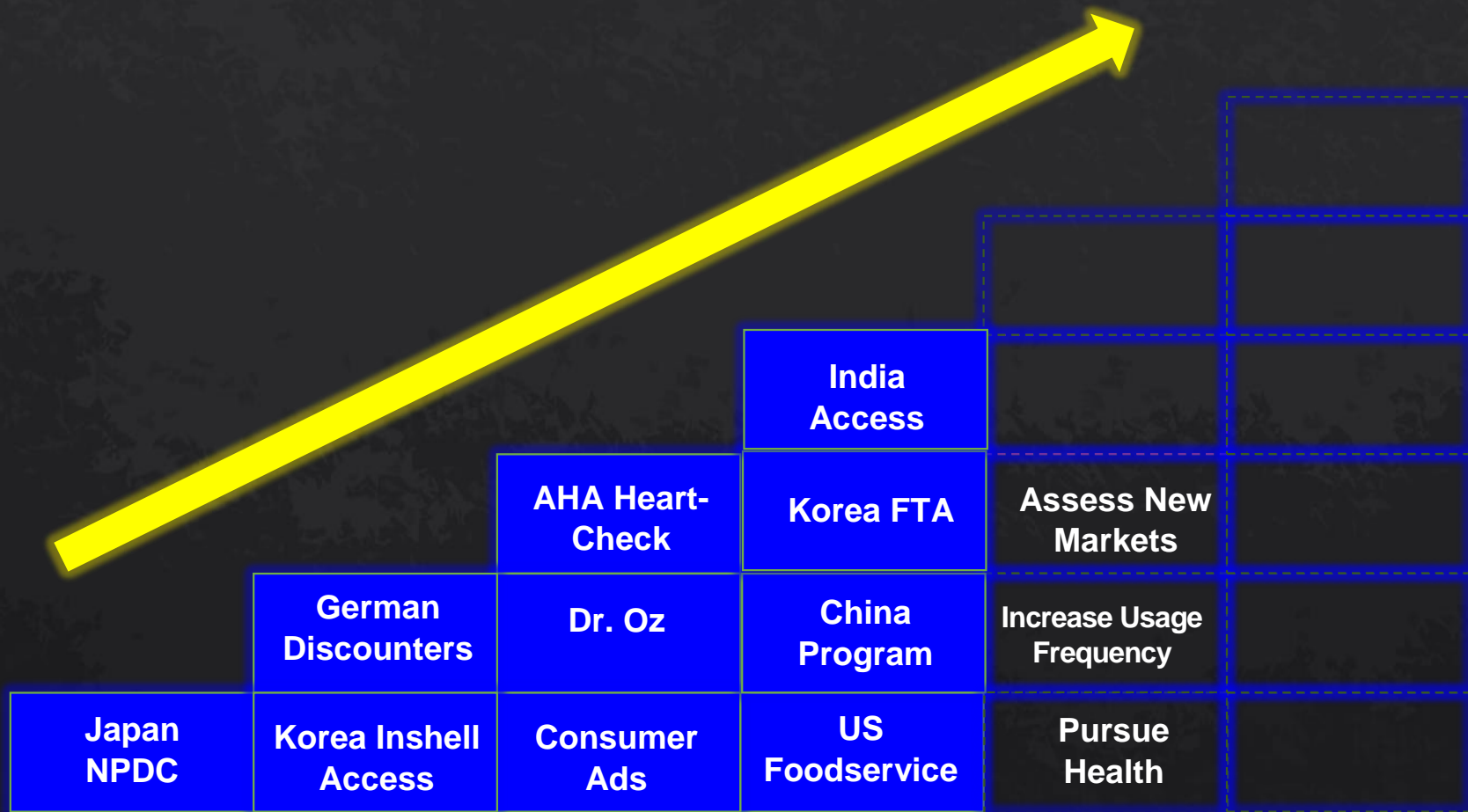


China  
Program  
Begins

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

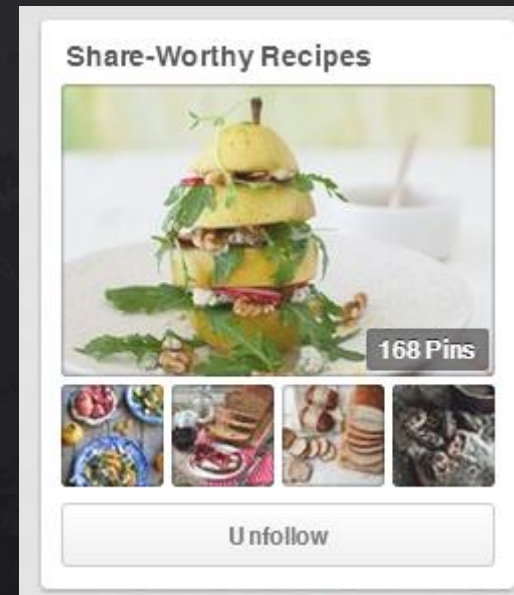
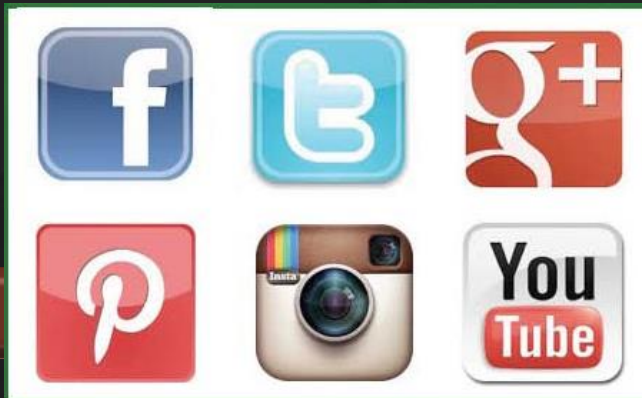
Retail Promotions



# 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 SEABASS 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](http://Walnuts.org)

CALIFORNIA  
*Walnuts*



# INDIA

## ■ Trade Advertising



**California Walnuts**  
Nutrition, Flavour and Versatility in a Nutshell

**INDIA MARKET**  
Now Open

**California Walnuts**  
Presenting new opportunities for the Indian Dry Fruit Trade

Walnuts are now allowed in India. A notification issued by the Ministry of Agriculture, Government of India, allows the import of walnuts for 99 percent of the commercial quantities of world trade. The Central Government has also notified that the state's prime walnut growing areas have deep fertile soils and ideal growing conditions for the production of high quality walnuts. For their excellent quality, California walnuts are grown and regulated by the California Walnut Board, Food and Drug Administration (FDA). A program is in place to ensure that the quality of the walnuts is maintained.

Contact for industry guide, shipper list & more information:  
  
**California Walnut Commission**  
 661 Pace City-II, Sector 37, Gurgaon (HR), INDIA 122 004  
 Ph: +91(124)434-4500 • Fax: +91(124)434-4501  
[www.californiawalnuts.in](http://www.californiawalnuts.in) • [walnuts@cwac-group.com](mailto:walnuts@cwac-group.com)

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# 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



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)

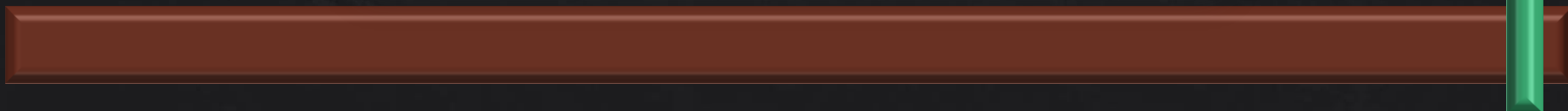


# KOREA

- Opinion Leader Outreach



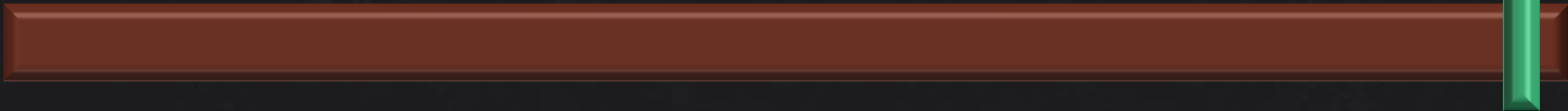
Korean Nutrition Society



# 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

# California Walnut Board 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



## 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

101 Parkshore Drive, Suite 250

Folsom, CA 95630

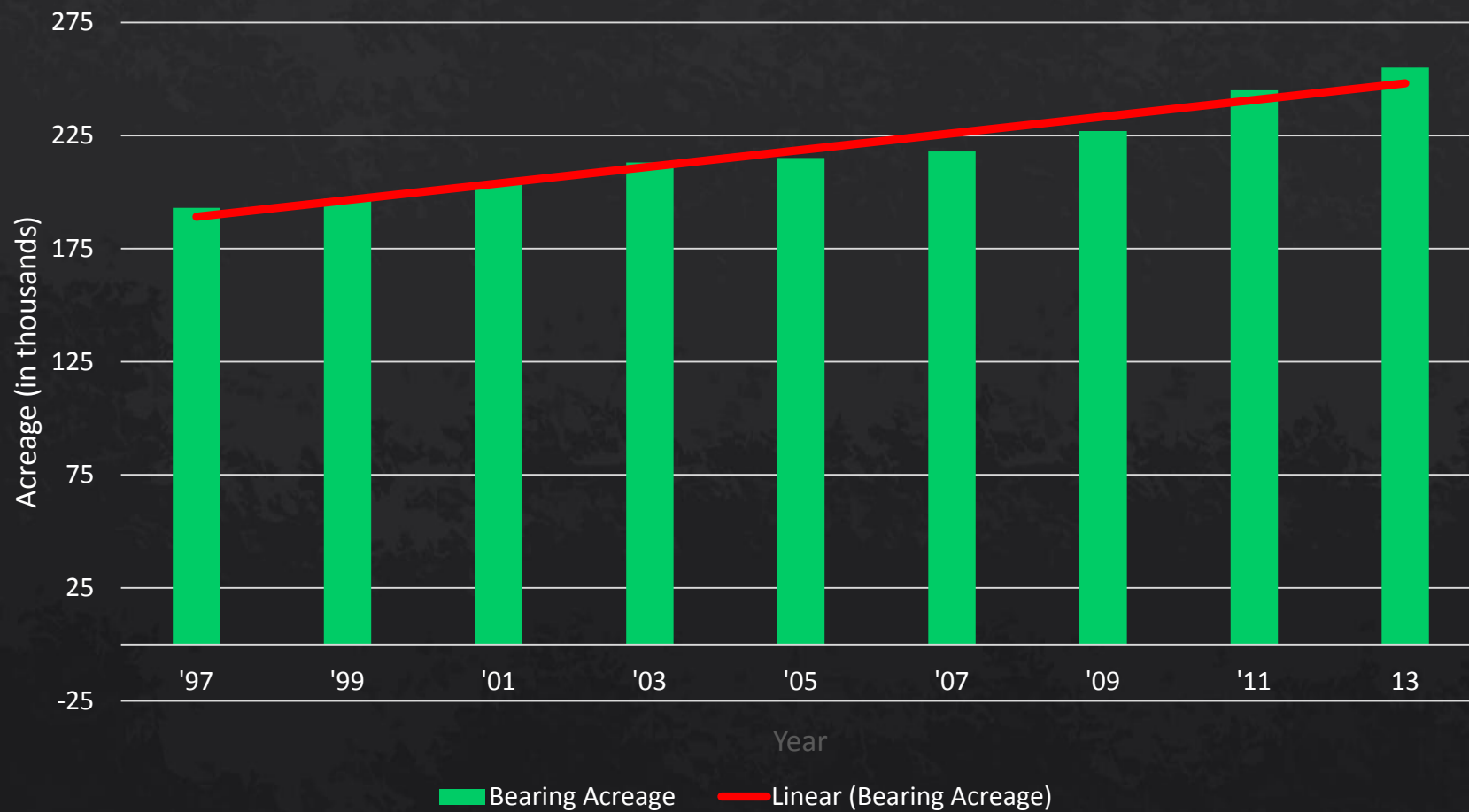
(916) 932-7070

[www.walnuts.org](http://www.walnuts.org)

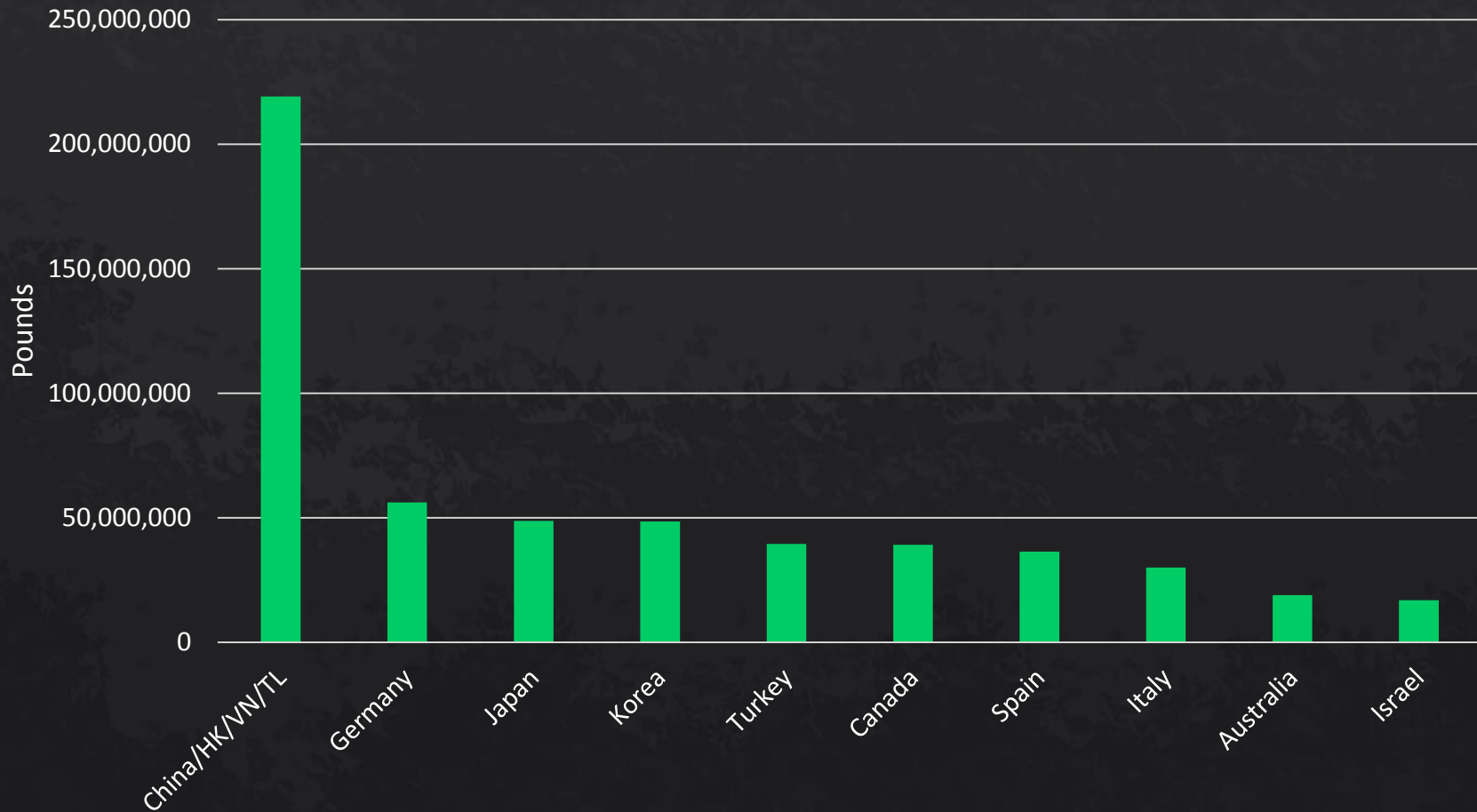
# APPENDIX



# BEARING ACREAGE

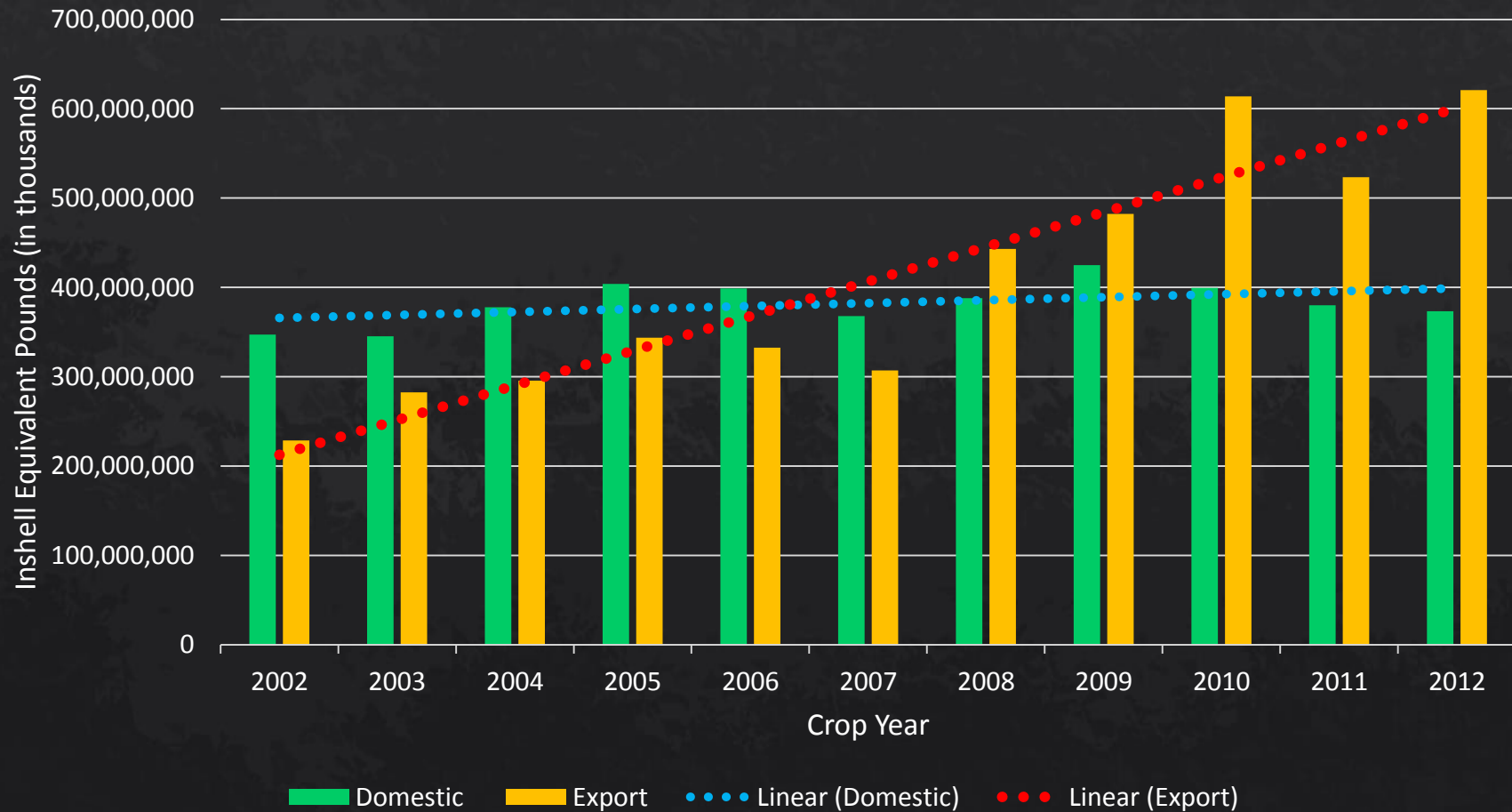


# 2012 TOP EXPORT MARKETS





# 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

2009

2012

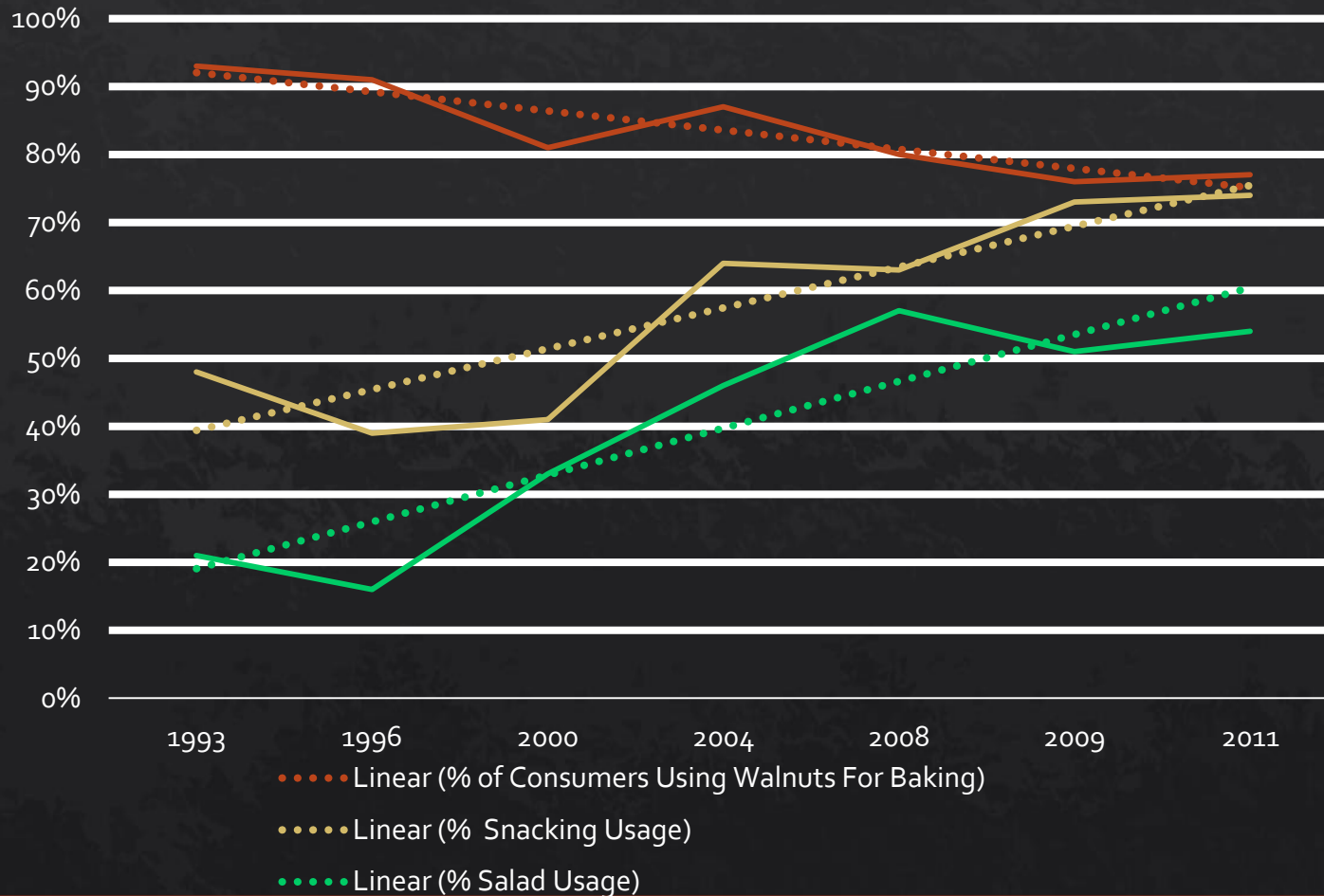
2013

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

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

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)

# 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