Potential of California Almonds 2004

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President and CEO
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Who We Are

Almond Board of California (ABC)
- A non-profit organization
- Federal Marketing Order since 1950
- Source of almond industry information, statistics/markets, science
- Generic advertising and public relations
- Research areas: environment, food quality and safety, nutrition, production
- Global consumer education and information

ALMOND ADVANTAGE
Long Term Strategic Planning

Our Vision:
“To be the healthiest specialty crop in the world”

- Strategic Priorities
  - Build the case supporting the vision and spread the word among global consumers and the trade on the benefits of consuming more almonds.
  - Facilitate industry-wide system for assuring food safety from farm to fork.
  - Proactively seek solutions to environmental challenges and differentiate the industry.
  - Assure a basic/applied research capability.
ALMOND ADVANTAGE
Nutrition Research

- Qualified Health Claim
- Dose Response Studies
- Portfolio Eating Plan
- Weight Loss/Maintenance Research
- Current Working Areas of Research
- Foundation for Marketing & Promotion Activities

ALMOND ADVANTAGE
Public Relations Coverage

- Media Impressions
- Health Claim
- International Programs
- Influencer Program
- Relationships
  - American Heart Association
  - American Dietetic Association
**ALMOND ADVANTAGE**
Clear Consumer Results

- **People are eating more almonds**
  - U.S. per capita consumption doubled over past five years
    - Under half a pound to over a pound
  - Almonds, for the first time, exceeded peanuts in new product introductions
- **More often**
  - Monthly purchase frequency jumped from 1.7 to 2.2
- **For more reasons**
  - Over 75% believe almonds are “nutritionally excellent or good”
  - Taste and convenience are still top reasons for eating almonds
- **Internationally, almonds are moving beyond seasonal usage**
  - Moving to year-round consumption

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**ALMOND ADVANTAGE**
Unique Location

- In USA—only in CA
- Spanning 500 miles throughout the Central Valley
- California’s No. 1 agricultural export (value basis) to over 90 countries
- CA grows 80% of the world supply
ALMOND ADVANTAGE
Record Almond Crops and Shipments

- Record crop size for second consecutive year
  - 6,000 growers produced a record 1.082 billion pounds
- Record shipments for third consecutive year
  - 982 million pounds (20% increase from previous year)
- Prosperous farm pricing trend

![Historical Shipments Chart]

ALMOND ADVANTAGE
Promising American Consumer Trends

- 2/3 of Americans report consciously attempting to eat heart healthy foods (AHA, 2004)
- 93% of consumers believe that some foods can prevent or even cure disease (IFIC, 2002)
- 69% of consumers have added a food item to their diet in an effort to eat healthier (NMI, 2003)
- Almonds are the only nut showing an increase in consumers “choosing to eat either by themselves or in other foods on an ongoing basis” (AAU, 2003)
**ALMOND ADVANTAGE**

Promising Product Trends

- For the first time, almonds exceeded peanuts in new confectionary introductions (IRI, 2004)
- Almonds are the #1 nut in confectionary and bakery new product introductions (IRI, 2004)

- 40% of new secondary and 12% of new primary almond are low-carbohydrate (IRI, 2004)

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**ALMOND ADVANTAGE**

United States is Leader in Growth

- U.S. is the largest market with the greatest growth
  - 30% shipments, 22% growth
  - International markets grew 19%
- Top ten export markets represent 74% of export shipments
**ALMOND ADVANTAGE**

_Growth in All Markets_

- **Established markets showing strong growth**
  - U.S.A. 22% Growth
  - Western Europe 17% Growth
  - Japan 9% Growth

- **Tremendous opportunity in emerging growth markets**
  - Russia 23% Increase
  - India 10% Increase
  - China 28% Increase

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Thank you!

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Of  
Almond Board of California

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