



JAPAN AND SOUTH KOREA: ALMONDS FOR BEAUTIFUL LIFE

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Japan and South Korea Almonds for Beautiful Life

Emily Fleischmann
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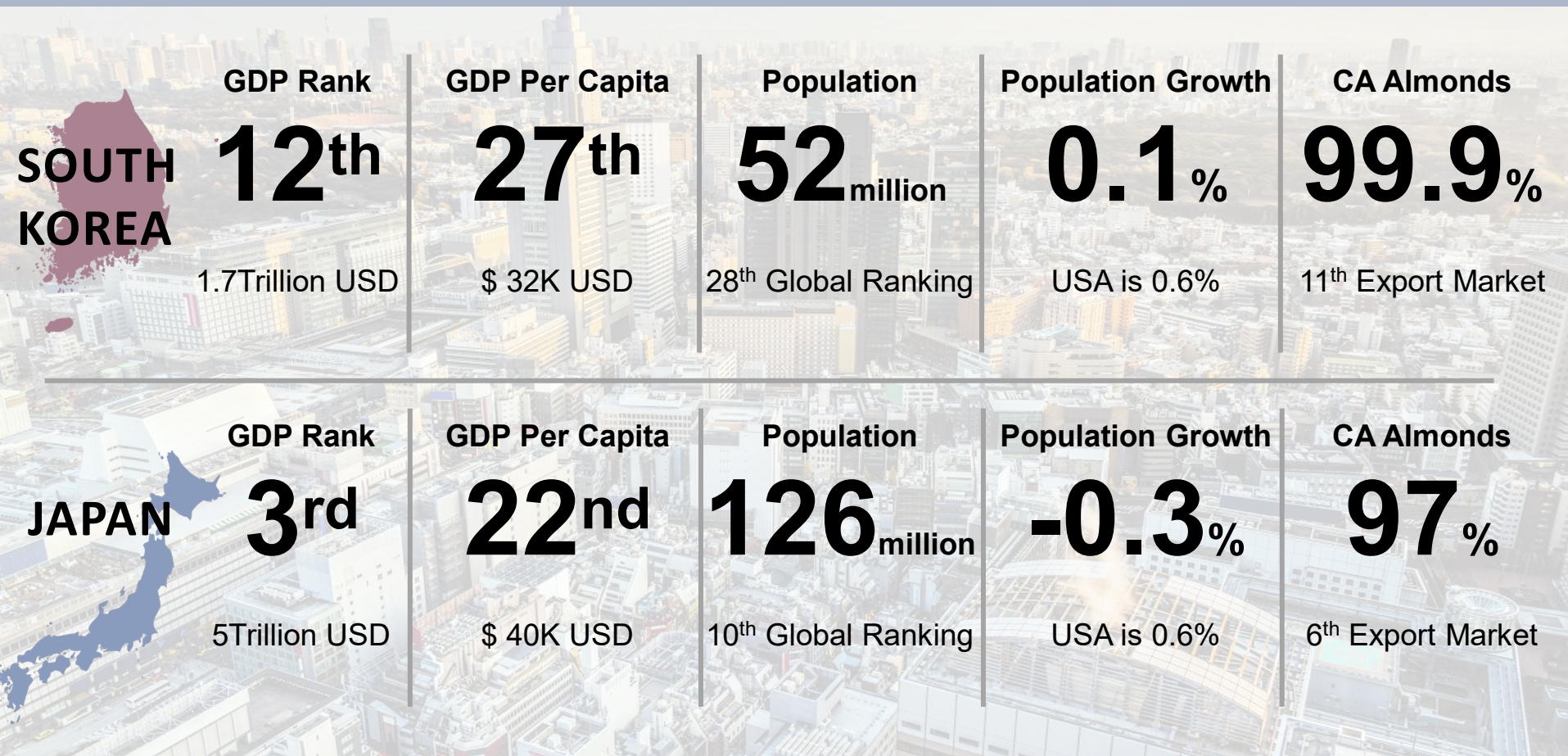
A stylized map of South Korea is shown in a maroon color, occupying the left half of the image. The map is semi-transparent, allowing the white text to be visible over it.

**SOUTH
KOREA**

A stylized map of Japan is shown in a blue color, occupying the right half of the image. The map is semi-transparent, allowing the white text to be visible over it.

JAPAN

SOUTH KOREA vs JAPAN



SOUTH KOREA MARKET OVERVIEW

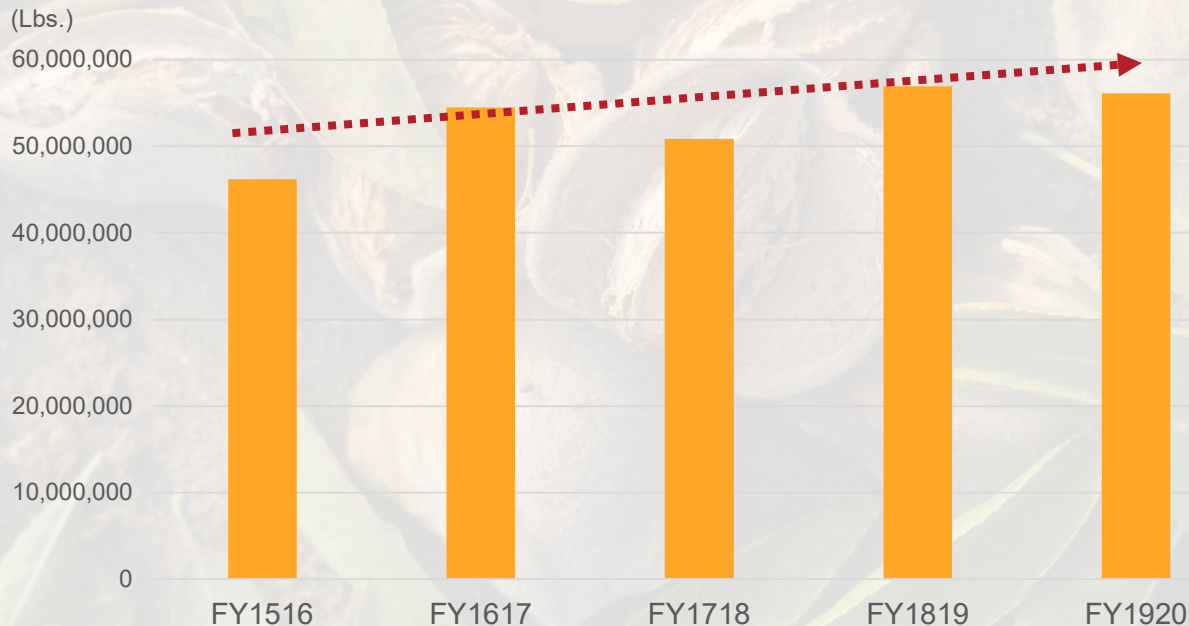


- **11 largest export market for California almonds**
- **Shipments were at all time high in FY1819 (+12% vs PY) and kept steady in FY1920. (-1.6% vs PY)**
- **The only country in Asia with over 1lbs per capita consumption (56M lbs / 52M population)**
- **South Korea favors California almonds vs other origins - California origin continues to dominate market at over 99% market share over past 5 years.**

SOUTH KOREA SHIPMENT

Shipments were at all time high in FY1819 (+12% vs PY) and kept steady in FY1920.(-1.6% vs PY)

In FY1920, per capita consumption is at 1.1lbs/person



The Yearly Shipment to South Korea from FY1516 to FY1920

THE FOCUS OF BEAUTY HAS UNDERGONE A SHIFT

Recently, Korean women have started to consider staying healthy to be just as important in sustaining their 'beauty' as maintaining their outward appearance.



Thinking on how one establishes a foundation for beauty has changed, leading to an increased number of people seeking healthy diets as a path towards not just health, but beauty.





Differentiate from Other Nuts and **POSITION ALMONDS AS BEAUTY SNACK** Using 3 Beauty Nutrients

VITAMIN E

8mg, 67% DV

Skin health
Hair health

FIBER

4g, 16% DV

Weight management

PROTEIN

6g

Weight management

ALMONDS BEAUTY SECRET CAMPAIGN in SOUTH KOREA

Live Life Beautifully

To make almonds being viewed as the perfect beauty snack for enhancing inner and outer beauty
Consumer perception = Our positioning of “Live Life Beautifully”

FY1718	FY1819	FY1920
Tell Our Almonds Story	Engage Our Target Audience	Share Our Almonds Story With Our Target Audience
Discover My Beauty	Show Your Beauty	Share Our Beauty
Beauty Snack Vitamin E	Beauty Snack Vitamin E Plant Based Protein	Perfect Beauty Snack Vitamin E as a Strong Antioxidant Ideal Plant- Based Protein Source
Almonds, My Beauty Secret	Almonds, Your Beauty Secret	Almonds, Our Beauty Secret

2020 Consumer Event Programs

MEDIA ACTIVITY



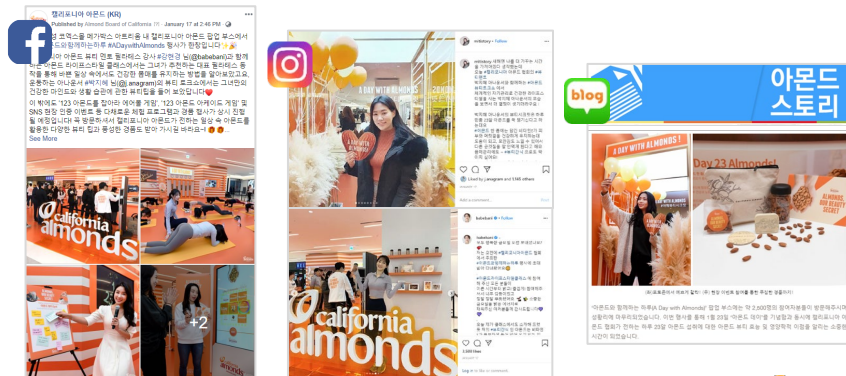
MEASUREMENT

About **2,500** visitors
More than **71** media coverage
Over **10M** impressions

OFFLINE ACTIVITY



ONLINE ACTIVITY



2020 Trade Event Programs

Seoul Food Show



Almond Trader Seminar



FY
1819

FY
1920



All trade events planned for 2019-2020 were cancelled due to COVID19.

FY 2021 will be an important year to strengthen relationships with existing trade members, and to expand network with new players are important by providing almond education materials.

FY2021 Sneak peek to what is coming!!!

1st phase beauty campaign from FY1718 to FY1920

Almonds Beauty Secret Campaign

2nd phase beauty campaign for FY2021

FY17-18

MY
Beauty
Secret
Almonds

FY18-19

YOUR
Beauty
Secret
Almonds

FY19-20

OUR
Beauty
Secret
Almonds

**“Make Your Day
Beauty-Full
with 23 almonds”**

New Beauty Campaign

**“ Make Your Day
Beauty-Full
with 23 almonds ”**



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Online references

Almond Korea website (almonds.or.kr)

Twitter

twitter.com/AlmondsKR

JAPAN MARKET OVERVIEW

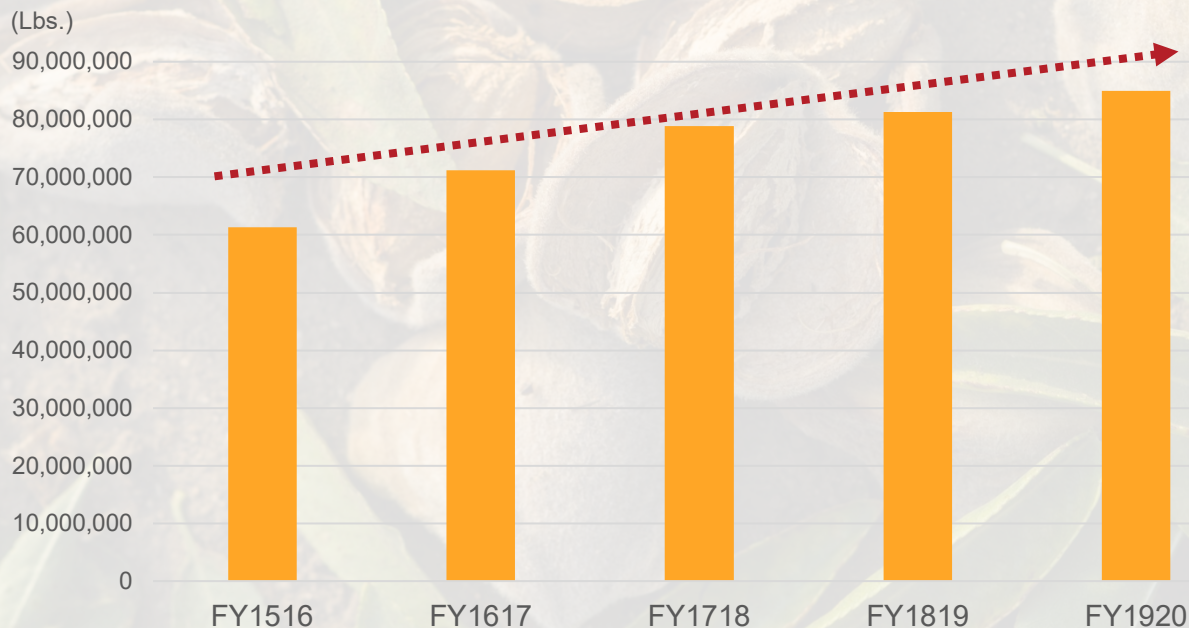


- 6 largest export market for California almonds
- In FY1920, the growth rate shows 5% compared to the year ago.
- Japan favors California almonds vs other origins - California origin continues to dominate market at around 97-99% market share over past 5 years.
- Tariff changed for almonds changed from 5% (prepared) and 2.4% (inshell and kernel) to eliminated 0%.

Market Overview

Japan #6 export market for ABC.

Shipments are increasing at a steady rate every year (81 million lbs, +3% vs PY)



The Yearly Shipment to Japan from FY1516 to FY1920

INCREASING AWARENESS OF ALMONDS' BEAUTY AND HEALTHY BENEFIT

Almonds having ownership over many positive attributes, including key beauty-related benefits.

Beauty (2019: 39% +6% vs PY)

Healthy (2019: 38% +7% vs PY)

Good for skin (2019: 34% +6% vs PY)



HIGHEST RECOGNITION IN SNACK AND CHOCOLATE ASSOCIATION

Top of Mind Awareness increased +14 points
which is +37% vs. PY

Snack (2019: 35% +3% vs PY)
Chocolate (2019: 46% +6% vs PY)



A Beautiful Life with Almonds

Almonds are perceived as nutritious, beauty-beneficial, and great-tasting - making them an obvious, intentional choice as a beauty snack

Continue to focus on vitamin E's beauty benefits via consumer campaign.

FY1819

E-ne Almonds!

Focus on Vitamin E

FY1920

A Beautiful Life with Almonds

Connecting **Vitamin E** and **Beauty**

FY2021



2020 Consumer Event Programs

MEDIA ACTIVITY (Media Orchard Tour)



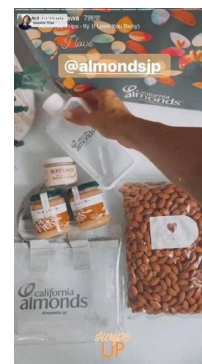
ONLINE ACTIVITY 1 (Social Media Promotions)



MEASUREMENT

- ✓ More than **22** media coverage from Media Orchard Tour
- ✓ Achieved **28M** impressions from Media Outreach
- ✓ Nearly **4M** impressions from two Social Media Promotion

ONLINE ACTIVITY 2 (Professional Influencer)



2020 Trade Event Programs

FOODEX Trade Show



FY
1819

FY
1920



Almond Trader Seminar

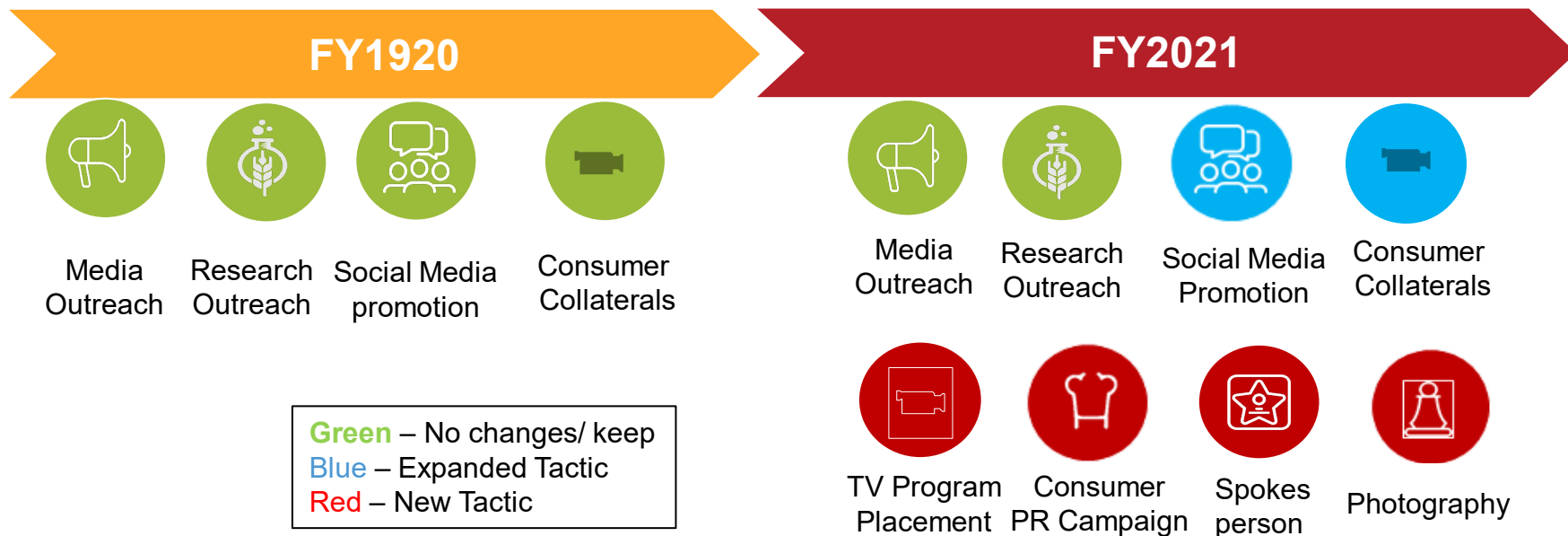


All offline Trade events planned for 2019-2020 were cancelled due to COVID19.

2021 important year to continue working to earn ABC's presence in market, to strengthen relationship with existing trade members, and to expand network with new players are important by supporting their business

2021 Sneak peek to what is coming!!!

Japan Market received an incremental \$900K investment, which will allow ABC to increase consumer touchpoints by 518%.
Maximize momentum of Almond Day (January 23) and Nuts Day (July 22) to promote almonds as a beauty snack.



Total additional impressions +57M, +518%

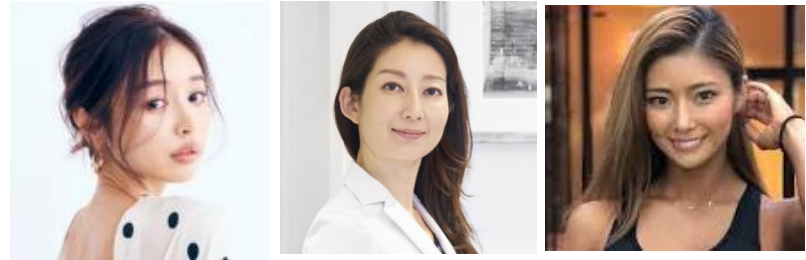
2021 Exciting New Programs!!!

4 Additional Consumer Tactics will Result in +57M impression which is +518% from the Previous Year.

PR Campaign



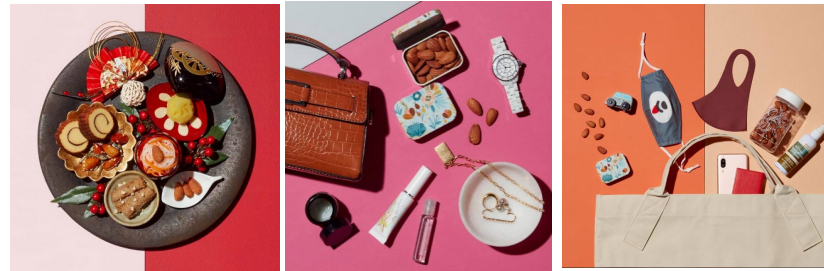
Spokesperson



TV Media Outreach



Photography



Continuing Beauty Campaign

**“A Beautiful Life
with Almonds”**

California Almonds

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Thank You!

