

New ideas from the West Coast

THE UNITED STATES OF AMERICA ARE THE LEADING SUPPLIERS OF ALMONDS AND ALMOND PRODUCTS. THIS SUCCESS IS, LAST BUT NOT LEAST, DUE TO THE ACTIVITIES OF THE ALMOND BOARD OF CALIFORNIA (ABC). WITH “AMANDERIE”, THE ABC HAS JUST LAUNCHED A NEW MARKETING CONCEPT. BAKING+BISCUIT INTERNATIONAL TALKED TO **SHIRLEY HORN**, CHIEF MARKETING OFFICER OF THE ORGANIZATION, ABOUT CURRENT AND FUTURE DEVELOPMENTS

+ bbi: The Almond Board of California is a grower-enacted federal marketing order under the supervision of the United States Department of Agriculture. What are your duties and who finances the institution?

+ Horn: The Almond Board of California administers a grower-enacted Federal Marketing Order under the supervision of the United States Department of Agriculture. Federal Marketing Orders, which have quasi-governmental status, are used by many commodity groups as a means of combining their financial resources in pursuit of the common interests of the industry.

Established in 1950, the Board's charge is to promote the best quality almonds, California's largest tree crop. The California almond industry funds the directives of the Almond Board by contributing three cents for every pound of almonds entering the marketplace. The Board seeks to expand the domestic and international markets for almonds through generic public relations, advertising and nutrition research. Along with the expansion of the global marketplace, the Board funds environmental and production research projects that aid industry members in continuing to produce almonds more efficiently and responsibly.

A Board of Directors consisting of five almond growers and five almond processors, as well as numerous committees, represent the interests of the industry and provide strategic direction and oversight for the investments of the Almond Board. All Board members serve without compensation, donating time, effort and energy for the good of the industry. A staff of professionals works with Board-appointed Committees to carry out Board directives.

The Almond Board of California is chartered to conduct marketing programs and research (production, nutrition, technical and market) on behalf of the California Almond industry, which comprises approximately 6,000 growers. The funding for these programs is provided by a mandatory assessment of \$.03 (3 cents) per pound of almonds produced.

+ bbi: Are the promotions mostly dedicated to the b2b or to the b2c market?



++ Shirley Horn Chief Marketing Officer

+ Horn: Supported by the industry's legacy of research-based outreach, the Almond Board's marketing programs provide a constant stream of communications that educate and inform consumers, manufacturers, foodservice operators and health professionals about the nutritional benefits and versatility of almonds.

+ bbi: How important is the bakery market – from bread to confectionery – as an almond user?

+ Horn: Historically, almonds have been a featured ingredient in the pastry tradition of a multitude of cultures. In Europe alone, we have Italian amaretti cookies

and biscotti; French gateaux and macaroons; German stollen and bienenstich; the marzipan coated Christmas cake of Great Britain; and the butter cakes, cookies, and gingerbread of Austria, Germany, and Scandinavia. At home in any bakeshop, almonds speak for current consumer trends as few ingredients do.

Consumer market research conducted by the Almond Board of California points to an expanded role for almonds in the bakeshop and pastry kitchen. Consumer perception that almonds are both healthy and indulgent¹ plays directly into the trend towards “better-for-you” baked goods.

A parallel trend suggests that consumers are seeking small indulgences, which can take the form of a simple cupcake, miniaturized and garnished with sliced almonds or an exquisite (heart-healthy) bittersweet chocolate confection, given a nutty flavor and nutritional boost with toasted slivered almonds. Consumers continue to broaden their flavor horizons, scouring the globe for authentic and global flavors. Rustic Italian cookies or fruit and almond studded panforte are made authentically with the liberal use of almonds. Globetrotting consumers are warming to the baklava, kataifi pastries, and aromatic sweets of India and North Africa in which almonds play the starring role.

An appreciation of hand crafted foods leads consumers to appreciate time honored pastry classics. Consumers are increasingly looking for hearty, natural, high texture foods that indicate good health as well as a high end, handmade, artisan quality. Almonds fit perfectly with this trend. When added to batters and doughs, almonds retain their crunch. ▶

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With their strong consumer appeal, nutritional profile and taste, there is a tremendous upside potential for almonds as an essential ingredient in consumer pleasing bakery products. Bakery/pâtisserie represents the second largest category of almond usage globally and the Almond Board of California is in the midst of developing a global strategy that will help us determine how to satisfy the needs of bakery professionals around the world best to help them add more value to their products with almonds.



Noel Barnhurst

+ bbi: You are connected to the almond growers of California.

What can you tell us about the current crop, its quality and its quantity?

+ Horn: The June 30, 2009 objective almond forecast for the 2009-2010 crop year is 1.350 billion meat pounds, according to the USDA's National Agricultural Statistics Service – California Field Office (NASS/CFO). This forecast is based on 710,000 bearing acres. Given the quality and stability of the supply of California Almonds, there has never been a better time for bakers to innovate with almonds.

+ bbi: What are the specific developments in almond applications today?

+ Horn: Probably the most well known almond forms in bakery products are sliced natural (brown skin) for visual appeal and crunch, and almond paste (marzipan) as a creamy, rich inclusion. The wide range of almond forms and the consumer appeal of almonds can be a source of inspiration and innovation for the European baker. Almond meal (flour) is a particularly good example. Substituting almond meal gives baked goods a moist richness that is also gluten-free. Almond milk is a relatively new almond form that adds a natural sweetness to baked goods and allows bakers to claim lactose-free on their packaging. Almond butter, which has been more widely available in the U.S., is now finding its way to Europe and will give bakers yet another almond form to add to their innovation pallet. California Almonds are available in a wide range of sizes and varieties (each with distinct flavor profiles that compliment other ingredients and enhance overall flavor). European bakers may wish to consider new applications using small sized almonds... visually beautiful with the same powerhouse of nutrients as their larger cousins.

+ bbi: In previous years, the majority of the almond crop was sweet almonds with a small quantity of bitter almonds – the latter having a special taste. Californian almonds are completely sweet. Is this due to worldwide demand?

+ Horn: Polyphenols or tannins in almond skins may have a strong taste, but do not necessarily constitute a bitter taste. Bitterness in almonds is more related to amygdalin, a bitter compound existing in bitter almonds, apricot and peach kernels. California almonds are produced from strictly cultivated sweet varieties. It would be very hard to find bitter kernels in California almonds since there are no bitter trees or bitter branches (sweet variety bud grafted onto peach or plum rootstocks) in commercially managed orchards.

+ bbi: The Almond Board has just launched the “Amanderie” at the 2009 World Pastry Cup in Lyon, France. What is the idea behind the name and the contest?

+ Horn: Amanderie is the discipline of innovating classic almond applications in bakery, pâtisserie and artisanal chocolate. ABC paid tribute to the Amanderie art form that has long been used but only now formally recognized during the 2009 World Pastry Cup in France.

As a first time global partner of the World Pastry Cup, ABC celebrated decades of grand tradition and artistic talent by sponsoring the competition and showcasing the world renowned art of Amanderie. A hybrid of the French words amande (almond) and pâtisserie (pastry), Amanderie is a discipline that consists of well defined standards, including a strong attention to detail and finish; trend setting and innovative applications; premium, high quality results; a commitment to excellence in technique; and the exclusive use of California Almonds.

+ bbi: How are you trying to market the “Amanderie” and how are you bringing bakeries and confectioneries to promote products with almonds as something special? Is Amanderie a way of bringing almonds into the public arena in an attempt to popularize them as in medieval times?

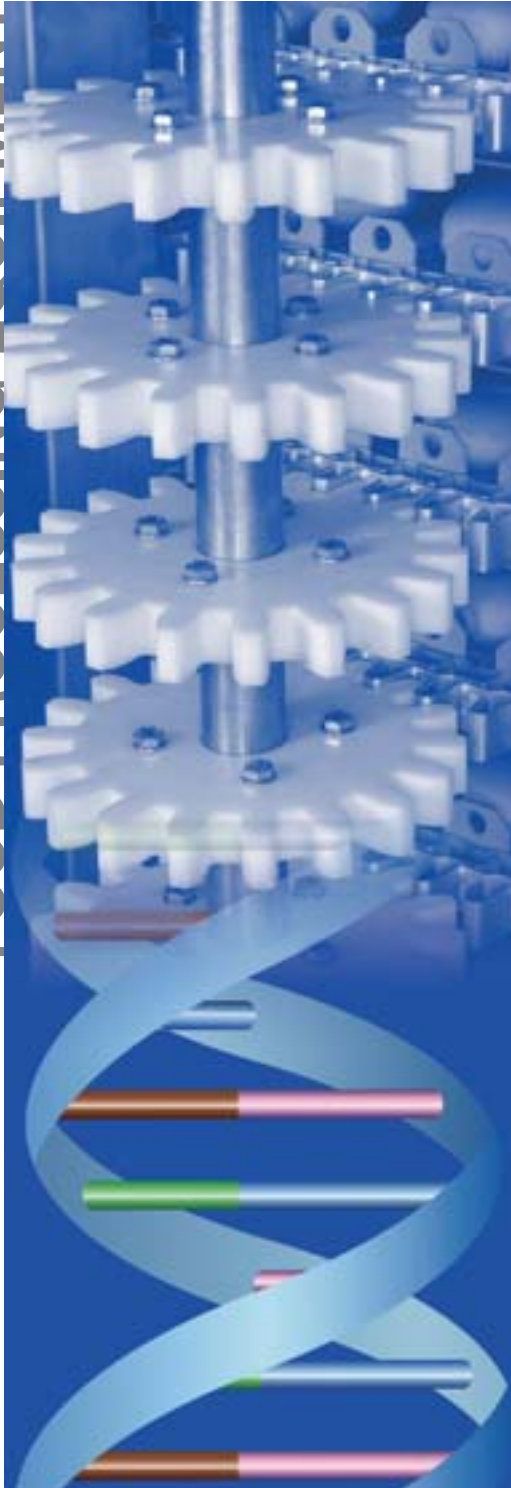
+ Horn: The Amanderie tradition aligns with the identity of almonds across global markets. Throughout history, pâtissiers have created techniques and dishes in which almonds are central, and those have become integral to the pastry fundamentals that are still applied around the world today.

In fact, nearly 20 classic French pâtisserie recipes would be incomplete without the use of almonds. Many classics in such notable categories as gateaux, tartes and galettes, viennoiseries, garniture and friandises require almonds exclusively to be truly authentic.

More than 80 percent of the world's supply of almonds is grown in California, a state known for its sunshine and quality produce. The demand for almonds is best defined ▶

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through world trends in pastry and baking. For example, in France, consumers are willing to pay more for traditional and specialty products², and in Germany, consumers are shifting to more expensive premium bakery products that have functional³ ingredients, such as almonds². Similar purchase patterns can be observed in North America, as in-store artisanal and private label products have witnessed strong growth, and artisan products account for 50 percent of retail sales volume⁴. In Asia, the region's pâtisserie and bakery trends are greatly influenced by French styles and trends.

As a proud partner of the 2009 World Pastry Cup, ABC celebrated chefs' artistic talents and innovative almond uses at the competition. Each of the 22 teams from around the world intensely trained to develop and perfect three dishes: a chocolate dessert, a fruit ice cream dessert and a typical dessert from their country. All of the chefs used California Almonds – available in a multitude of forms – to create their masterpieces over two intense days of competition.

+ bbi: Almonds are not only used in recipes for sweet pastry but also in bread recipes and snacks. What is the biggest market for almonds and what are the growing rates of the different markets?

+ Horn: According to the Mintel Global New Products Database (GNPD), almonds became the leading nut introduced in new retail products worldwide in 2008, with 160 more new product introductions than peanuts and 423 more new products than hazelnuts. In a global food market that declined six percent in new product introductions overall, new almond introductions have been virtually stable from 2007 to 2008, declining by only one percent. Almonds maintained a 29 percent share of new nut product introductions and continued to be the most diversified nut with high numbers of introductions across all regions and categories.

The majority of nut (73 percent) and almond (76 percent) introductions worldwide continued to be focused in confectionery, bakery and snacks. Out of all new almond products introduced, 37 percent were introduced in the confectionery category, 20 percent occurred in bakery and 19 percent were in snacking.

Europe leads the way. Europe continues to introduce more almond products than any other region; 36 percent of all new almond product introductions in 2008 were made in Europe. In 2008, Germany was the top almond introducer in Europe (89 introductions, an increase of 31 percent vs. 2007), followed by the UK (67 introductions), Austria (50 introductions) and France (48 introductions). Seasonal, pre-



Noel Barnhurst

mium, no additives/preservatives and vegetarian are in the top 5 almond product claims in Europe. Confectionery (39 percent), bakery (23 percent) and snacks (14 percent) remain the top 3 categories for new almond product introductions in Europe.

+ bbi: Is it possible to label almonds as a healthy snack according to the 2009 European health claims' regulations?

+ Horn: The high nutrient density of almonds in relation to EU nutrition guidelines opens up a wealth of opportunity to communicate the health benefits of this multi-faceted ingre-

dient. Almonds often exceed the requirements for various nutrition claims, based on the new EU regulations EC No. 1924/2006 on nutrition and health claims on food.

For example, in terms of vitamins and minerals, whole natural almonds qualify for 'high in' claims for a range of vitamins and minerals, including vitamin E, calcium, iron, magnesium, phosphorous, potassium, copper, manganese, zinc and riboflavin.

Based on the nutrient levels present in whole almonds, the nuts also qualify for several nutrition claims for selected nutrients. With 14.7% of almonds' energy derived from protein, almonds can claim 'natural source of protein'. Whole natural almonds also contain 12.2g of dietary fiber per 100g, sufficient to claim 'naturally high in fiber'. Whole natural, unsalted almonds only contain 1mg sodium per 100g, which is within the claim criteria for sodium-free. Whole natural almonds also contain 3.89g total sugars, and foods claiming 'naturally low in sugars' may contain no more than 5g sugars per 100g.

+ bbi: Can we expect something special at iba, in Düsseldorf?

+ Horn: The Almond Board of California is in the final phases of completing its global bakery research and strategy development. Once the strategy has been defined and approved, the Almond Board will be developing program plans accordingly. The Almond Board has no plans to exhibit at iba in Düsseldorf at this time. +++

¹ Sterling Rice Group, U.S. Consumer Attitudes, Awareness and Usage of California Almonds. Boulder, Colo., 2007.

² *Euromonitor International*, Baked Goods in France, 2007.

³ The Institute of Food Technologists defines "functional foods" as foods and food components that provide a health benefit beyond basic nutrition (for the intended population), *Functional Foods: Opportunities and Challenges*, March 24, 2005.

⁴ *Euromonitor International*, Baked Goods in North America, 2007.

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