

Frozen Food

Vikas Mittal, MD, McCain Foods (India)

Page 26

Supplier

Raj Seelam, Founder, 24 Mantra

Page 40

Technology

Grocers leverage Data Analytics

Page 60

PROGRESSIVE GROCER

March 2015 · Volume 9 Number 3 · Rs 100 · www.indiaretailing.com



PARTNERS IN RETAIL: LET'S TALK



Editor in Chief: **Amitabh Taneja**
 Editorial Director: **R S Roy**
 Publisher: **S P Taneja**
 Chief Operating Officer: **Bhavesh H Pitroda**

Editorial

Head, Knowledge & Editorial Alliances: **Rajan Varma**

Managing Editor: **Nupur Chakraborty**
 Correspondents: **Roshna Chandran**
Angel Kashyap

Conference Content: **Nakul Jain**
Mohua Roy

Contributing Editor: **Namita Bhagat**

Creatives

Art Director: **Pawan Kumar Verma**
 Dy. Art Director: **Deepak Verma**
 Sr. Layout Designer: **Naresh Kumar**
 Sr. Photographer: **Vipin Kardam**

Production

General Manager: **Manish Kadam**
 Sr. Executive: **Ramesh Gupta**

Support

General Manager - Administration: **Rajeev Mehandru**

Subscription

Asst. Manager-Subscriptions: **Kiran Rawat**

ADVERTISING

Business Head

Rakesh Gambhir, Vice President
 E: rakeshgambhir@imagesgroup.in M: +91 9910001375

DELHI **Ekta Roy**, Manager
Devpriya, Asst. Manager
MUMBAI **Waseem Ahmad**, VP & Branch Head
Akanksha Tawade, Sr. Executive
BENGALURU **Suvir Jaggi**, Assoc. VP & Branch Head
KOLKATA **Piyali Oberoi**, Assoc. VP & Branch Head
Arijit Dey, Executive

FOR ADVERTISING QUERIES, PLEASE WRITE TO salesfood@imagesgroup.in

PRIVILEGE MEMBERSHIP/CONSUMER CONNECT

Anil Nagar, Assoc. VP
 anilnagar@imagesgroup.in
 Mob.: +91 9811333099

Hemant Wadhawan, General Manager
 hemantwadhawan@imagesgroup.in
 Mob.: +91 9810424668

Membership Team: **Misba Naushad** **Sarika Gautam**
Priti Kapil **Rajiv Kumar Palta**

PROGRESSIVE
GROCCER
AHEAD OF WHAT'S NEXT

VP/Group Publisher: Jeffrey Friedman
 Editor-in-Chief: Meg Major
 Senior Editor: James Dudlicek
 Managing Editor: Bridget Goldschmidt
 Director of Integrated Content/
 Technology Editor: Joseph Tarnowski
 Creative Director: Theodore Hahn
 Contributing Editors: David Diamond, Bob Gatty,
 Bob Ingram, David Litwak, Tammy
 Mastroberte and Jennifer Strailey

Stagnito
 BUSINESS INFORMATION

President & CEO: Harry Stagnito
 Chief Operating Officer: Kollin Stagnito
 Vice President & CFO: Kyle Stagnito
 Senior Vice President, Partner: Ned Bardic
 Vice President/Custom Media Division: Pierce Hollingsworth
 HR/Production Manager: Anngail Norris
 Corporate Marketing Director: Robert Kuwada
 Promotion and Marketing Manager: Ashley Cristman
 Director, Conferences & eLearning: Amy Walsh
 Manager, eMedia Strategy & Development: Mehgan Recker
 Audience Development Director: Cindy Cardinal

Some say Indian retail is at an uncertain juncture. The world is going digitally ballistic, and the consumer is getting more and more patient. We all know that grocery retail is a long-term business and requires plenty of patience. But, now, if food suddenly goes online, what's next for brick and mortar retailers?

The physical store is about the five senses and a complete experience and that is something the online channel cannot match, even as it offers seriously cool paths to purchase. My advice to the former? Pump up the volume.

Most Indian supermarkets offer tons and tons of products and an almost total absence of experience. Just because consumers come to supermarkets to purchase necessities -- many of which are mundane -- should the shopping environment be equally uninspiring? The edge that physical stores have has not been utilised, frankly. Addition of new categories, fresh products, out-of-the-box merchandising ideas and customer delight features is sadly under-used. Is it any wonder that consumers are veering toward the no-fuss, clearly navigable aisles of online channels in some categories?

Read the McKinsey feature on Christian Wanner, a pioneer of online grocery retailing, who entered this business years before anyone else in the world. Read his remarkable insights on how he built a start-up model for a new channel. How he found out the gaps in traditional retailing. And he how he nailed them.



Amitabh Taneja
 Editor-in-Chief

All feedback welcome at editorpgindia@imagesgroup.in

All material printed in this publication is the sole property of Stagnito Media, 111 Town Square Place, Suite 400 Jersey City, or Images Multimedia Pvt. Ltd. or both, and each of them have copyrights on their respective materials. All printed matter contained in the magazine is based on information provided by the writers/authors. The views, ideas, comments and opinions expressed are solely of the writers/authors or those featured in the articles and the Editor and Printer & Publisher do not necessarily subscribe to the same.

Printed & published by S P Taneja on behalf of Images Multimedia Pvt. Ltd. Printed at Aarvee Printers Pvt. Ltd., B-235, Naraina Industrial Area, Phase -1, New Delhi 110028 and published by S P Taneja from S-21 Okhla Industrial Area Phase - 2, New Delhi. 110020 Editor : Amitabh Taneja

In relation to any advertisements appearing in this publication, readers are recommended to make appropriate enquiries before entering into any commitments. Images Multimedia Pvt. Ltd. does not vouch for any claims made by the advertisers of products and services. The Printer, Publisher and Editor-in-Chief of the publication shall not be held for any consequences in the event of such claims not being honored by the advertisers.

All rights reserved. Reproduction in any manner is prohibited. All disputes are subject to the jurisdiction of competent courts and forums in Delhi/New Delhi only. Progressive Grocer does not accept responsibility for returning unsolicited manuscripts and photographs.

For subscription related queries, email to: subscription@imagesgroup.in
 For feedback/editorial queries, email to: letterzeditor@imagesgroup.in
 visit us at www.imagesgroup.in

Images Multimedia Pvt. Ltd. (CIN:- U22122DL2003PTC120097)

Registered Office: S 21, Okhla Industrial Area, Phase II, New Delhi 110020,
Ph: +91-11-40525000, **Fax:** +91-11-40525001

Email: info@imagesgroup.in, **Web:** www.imagesgroup.in

Mumbai: 1st Floor, Panchal Iron Works, Plot No. 111 / 3, Marol Co-Operative Industrial Estate, Marol, Andheri (East), Mumbai - 400 059,

Ph: +91-22-28508070 / 71, **Fax:** +91-22-28508072

Bengaluru: 523, 7th Cross, 10th Main, (Jeevanbhima Nagar Main Road), HAL 3rd Stage, Bengaluru 560 075, **Ph:** +91-80-41255172/41750595/96, **Fax:** +91-80-41255182

Kolkata: 30-B, Anil Roy Road, Ground Floor, Kolkata 700 029, **Ph:** +91-33-40080480, **Fax:** +91-33-40080440

Retailer



18

HOW TO WIN IN ONLINE GROCERY: ADVICE FROM A PIONEER

Christian Wanner, co-founder of one of Europe's first and largest online grocery stores, talks about what works, what doesn't, and what will change in food retailing as e-commerce continues to heat up.

14

FRONT END: ON TOP OF UP FRONT

Enhancing the front end experience must include customer needs, security concerns and the bottom line



16

OPERATIONS: SIX ALLIES FOR SUPPLY CHAIN SUPERIORITY

2015 will be the year that supply chains really focus on building their capability

24

FRESH FOOD: STONE FRUIT FORECAST

Quality crops, new varieties and value-added introductions are creating fresh excitement in U.S. supermarkets



30

FRESH FOOD: ORGANIC OPPORTUNITY

U.S. consumers seeking supermarkets with clean, fresh and flavourful produce they can trust

38

FROZEN FOOD: THINKING LIKE A RESTAURANT

The breakfast daypart is a bright spot in the grocer's frozen case

39

FROZEN FOOD: THE FINAL FLOURISH

Frozen desserts are moving way beyond the ordinary

Suppliers



26

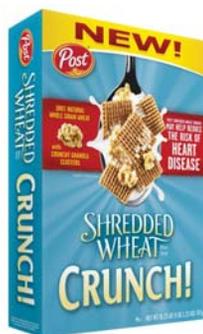
ENTRÉE EXTENSION

Since 1998, McCain Foods (India) has been engaged in agriculture R&D and in development of the frozen food category in India and subcontinent countries. Vikas Mittal, MD, McCain Foods (India) speaks to Angel Kashyap about the opportunities and challenges

40

GETTING REAL

The much-publicised benefits of organic foods are continuing to drive manufacturer interest, but challenges remain



44

GROCERY: SUPER BOWL

Ready-to-eat cereals can maintain their primacy by upping their innovation and marketing prowess



46

GROCERY: SWEET IRONY

Next year, a new generation of stevia sweeteners produced by fermentation instead of extraction is going to hit the market

50

GROCERY: CONSIDER THE SAUCE

U.S. manufacturers and retailers market easy prep, value, variety and even health to time-starved shoppers

52

NONFOODS: SHAVE OVERHAUL

Following a frontal assault in the shaving category, U.S. retailers prepare for the next wave



54

NONFOODS: THE SMELL TEST

Grocers must select, merchandise and promote fragrances and scented bath products for optimal sales



56

TECHNOLOGY: DATA MAKES THE DIFFERENCE

Rumors of loyalty cards' death are greatly exaggerated, analysts say

60

TECHNOLOGY: FUTURE TENSE

U.S. retailers are harnessing the power of predictive analytics to drive their businesses



8

MARKET UPDATE

What's new in the food business

64

WHAT'S NEXT

New products on the shelves

66

BUSINESS OPPORTUNITIES

Fresh avenues to expand and grow with suppliers and retailers

Entrée Extension

Since 1998, McCain Foods (India) has been engaged in agriculture R&D and in development of the frozen food category in India and subcontinent countries. Already a supplier of choice to HoReCa businesses nationwide, the company is also accelerating its retail footprint, which is set to touch 50,000 points in five years' time. Vikas Mittal, MD, McCain Foods (India) speaks to Angel Kashyap about the opportunities and challenges



Vikas Mittal, MD, McCain Foods (India)

At what pace is modern food trade growing? What are the factors that determine the growth of this format?

Modern food trade in India today is a direct outcome of the evolving lifestyle of contemporary women and the time paucity faced in our daily lives. We have experienced positive growth trends and increased in-home consumption of processed food riding on the consumer need for convenient lifestyle options. As more and more consumers find it difficult to cook every meal from scratch, McCain becomes poised for greater share of this sunrise category.

The trend towards processed food has evolved two dimensionally: it includes localisation of global food and globalisation of local taste buds. Keeping that in mind, we bring to the Indian consumer menu solutions that would satiate their appetite for any time of the day.

In addition to that, we can also see most QSRs and hotel chains offering all day menu





About 2/3rd of our business comes from institutional sales with customers in leading national and international QSR (Quick Service Restaurants) and HoReCa (Hotels, Restaurants, Caterers/ Canteens). About 1/3rd comprises retail and exports.

The sector itself is very vast and incorporates QSRs, hotel chains, fast food joints, and even catering services. In order to promote the products and connect with them, McCain undertakes activities such as organising HoReCa meets, participation in B2B shows, print advertising and one-on-one sampling for institutional customers.

For institutional customers, we offer solutions that they can not only use as a part of their menu creations, but also save on their time, energy and effort leading to increase in efficiency and profits. We realised that the Indian F&B market was heavily influenced by uncertain weather conditions, which affected quality and availability of basic food ingredients. To overcome this, we offered frozen foods as quick solutions which promise round-the-year availability, consistent product quality and

solutions starting from breakfast to lunch to evening snacks to dinner. This is with regard to the Indian consumer's acceptance and appreciation of convenience lifestyle.

However, if we focus on frozen foods per se, this category in India is still at a nascent stage. It is due to the fact that frozen food is laden with many myths regarding the nutritional value and preservative content. Although the Indian customer is gradually getting familiar with frozen foods, it will be some time before there is 100 per cent endorsement of these products. This market is evolving gradually and is very crucial for us.

You are a supplier to both retail and HoReCa sectors; which is the bigger contributor to your revenues?

We sell our offerings to both retail and institutional consumers. Our products, due to their versatility, have been appreciated and endorsed in both these sectors. Currently, institutional sector continues to be the larger contributor to our revenues.



www.theteatrove.com

Endless possibilities of customizing new blends!

For institutional offers contact: +91 9330160950

Valid till 30th April, 2015. | *Conditions apply.

15% Off

Apply discount code-images.*



www.pearlenterprises.in

Getting Real

The much-publicised benefits of organic foods are continuing to drive manufacturer interest, but challenges remain.

By Angel Kashyap



With the scale of food adulteration going on in India, concerns regarding quality of food are on the rise. A surge in lifestyle diseases such as cardiovascular ailments and several forms of allergy has motivated health professionals, consumers, and policymakers to promote healthy food consumption habits.

Alongside, on a cosmetic level, the aspiration to 'look good' is also driving consumer interest in no-preservative, low-fat foods that deliver natural nutrients.

Organically Aware

Organically grown foods are being promoted as a promising alternative by their manufacturers, activists and people concerned with human health, environment and animal welfare. As a result, the Indian retail universe is now increasingly populated by a variety of organic foods, including fruits, vegetables, cereals, dairy products and infant formulations.

The trend of organic food consumption, which was initiated in mature markets in Europe and North America, has expanded to developing countries like India and China only in the past few years. While Europe and North America are currently the largest consumers of organic food, the organic food market in Asia is likely to display higher growth rates over the next five years.

"The organic products' category has seen tremendous growth in the last couple of years and Indian consumers are becoming more conscious about their health as well as the environment," Amira Nature Foods Ltd Chairman and CEO Karan Chanana said during the recent launch of Amira's new organic food products.

Grassroot Investments

In India, majority of the demand for organic foods is originating from tier I cities such as Mumbai, Delhi, Chennai, Bangalore, Gurgaon and Pune. Increasing demand from metros is driving the entry of several businesses offering organic foods on

online channels. Included in this list are companies such as Conscious Foods, Eco Farms, Sresta Organics India, Navdanya and Morarka Organic Foods and Amira, among others. As per estimates, there are 570,000 organic food farmers supplying to a Rs 100-crore Indian organic food market, with over one million hectares under organic crop cultivation, about 50 per cent of which is for food. Most major chain stores, including Godrej Nature's Basket, HyperCity, Food Bazaar, More, Nilgiri's and Spencer's, now have a fairly healthy shelf presence for organic foods.

Commenting to the current market trends in organic products, Raj Seelam, founder, Sresta National Bioproducts Pvt. Ltd. and a pioneer in introducing organic foods in India, says, "With rising disposable incomes, consumers will be looking at better quality products across all verticals. Organic products are a great fit from the health, taste perspective. For us, ultimately more sales mean impacting more families positively through pure food and making life better for more farmers and contributing to a better planet."

Sresta was incorporated in 2004 with the vision of creating sustainable livelihoods for farmers and sustainable lifestyles for consumers. Given the highly fragmented nature of farming in India, millions of farmers are typically low-output, and in debt, resulting in large-scale migration away from agricultural activities. "Organic farming with its focus on sustainability reduces the financial risk of the farmers, encourages crop diversity and soil fertility," Seelam notes.

Sresta is a culmination of multiple experiences by Seelam and other founding team members related to unsustainable farming, food contaminated with pesticides and other adulterants. The endeavour is to provide pure and great tasting food; the fundamental belief at Sresta is "Food itself is curative" and "Food is to be enjoyed and celebrated".

Demand and Supply

Potential challenges to the organic food business arise from both demand and supply sides. Demand for fresh products, diversity of tastes and preferences, motivating the consumers to travel for price, sourcing base and efficiency, real estate availability and cost, manpower availability, increasing focus on private labels are the major key challenges faced by retailers at present. On the supplier side, while the future for organic foods looks promising, Sresta Natural Bioproducts' organic food brand 24 Mantra, among others, initially faced many challenges such as lack of awareness amongst consumers, a virtually

non-existent supply chain, non-availability of technology to grow, store and process organic grains and produce and consistent availability of products round the year.

Ensuring standardisation of quality and taste in products is one of the major challenges for organic food producers. A particular staple produced in a particular state or area differs from another one in taste or colour. Food quality depends on climate, soil, variety and farming practices.

Responding on standardisation as a challenge, Raj Seelam elaborates on how Sresta counters the bottlenecks. "We begin with selection of farming areas that will deliver the best quality in terms of taste, flavour for each product. Then, we carefully select farmers who are committed to growing crops organically, we train them, and supervise their production on a daily basis."

"As Sresta works with farmers directly, the company is able to ensure consistent quality and sources materials from the same origin/ products to give a consistently high quality cooking and sensory experience," he adds.

"Based on the geographical area, we develop projects in a 15 to 20 km radius with a few hundred to few thousand acres. We currently have about 40 projects across the country," Seelam informs.

Over the past decade, Sresta has developed an organic farming base of 20,000 farmers, 1,20,000 acres across 15 states in India, 30 certified organic processing units and sells a range of 200 products across 15 Indian states.

From the demand side, a limiting factor is also the price point; organic foods usually cost up to 20 to 30 per cent more than conventionally produced foods in the same categories





Future *Tense*

U.S. retailers are harnessing the power of predictive analytics to drive their businesses

By Dan Alaimo

Learning from the past is good, but predicting the future is better. Retailers in the U.S. are leveraging predictive technology tools to discover the competitive power of data for a variety of applications — customer-facing and operational — and they are reaping the benefits.

What is predictive analytics? A very basic definition is mining data for information to be used in predicting trends and behavior patterns, or as Linh Peters, VP of marketing at SpartanNash, in Grand Rapids, Michigan, puts it, “predicting the future using data from the past.” But there’s much more to it, she notes.

“There are many tactics, tools and capabilities that would fall under this definition,” Peters says. “At the end of the day, the goal is to make smarter, more strategic and informed business decisions that meet consumer needs.”

For example, predictive analytics tools not only take into account past data, such as product sales, but also the forces that will shape them in the future. And it’s on a “per-individual level,” according to Eric Siegel, a former Columbia University professor who founded the Predictive Analytics World business conference, based in Santa Barbara, Calif., and authored “Predictive

Analytics: The Power to Predict Who Will Click, Buy, Lie or Die.”

“It is technology that learns from data to render predictions per individual, which in the case of retail, is the individual consumer or shopper,” Siegel notes. “That’s what differentiates it and makes it by definition more actionable, more directly applicable, in rendering mass-scale operations more effective than other forms of business intelligence.”

Uses Across the Enterprise

Among the many uses supermarkets are finding for predictive analytics are promotions and coupons; campaign management; category management; assortments; inventory planning; resource and staff planning; shopper patterns, including attrition, pricing, e-commerce and mobile marketing; and various aspects of the supply chain.

“We are using it for pricing. We are using it in promotion. We are using it in our campaign management,” says an IT executive with a major supermarket chain, noting that it’s too early to know the results, as the retailer has been using predictive analytics for only six months.

“We are investing heavily in software as service types of applications that help us do predictive

analytics tied into supply chain, marketing, pricing,” adds the executive, who asked not to be named. “We are doing a lot of work in that space using solutions, so we are not creating our own. There are apps out there that we can use. We see a lot of value there.”

Like many organizations, SpartanNash leverages predictive analytics to determine sales and volume forecasting, according to Peters. “From a consumer standpoint, SpartanNash has made investments in technology and resources to ensure that we have the tools and capabilities in place that allow us to access and leverage data more broadly across the organisation,” she says.

The company sees significant opportunity as it relates to making more informed decisions in areas such as assortment, planograms and CRM strategy, Peters adds. “This not only benefits the shoppers of our corporate retail stores, but also provides meaningful data and insights for our distribution customers that will help them compete and differentiate their businesses.

“SpartanNash believes the potential for predictive analytics is significant,” she continues. “Equally significant is the plethora of information that is available to harness. Many retailers are able to capture information about their shoppers either through a loyalty program or analysis of credit card data. But with the growth of social media [and] mobile and digital channels, understanding how consumers think, feel and behave has become even more complex. The more information available, the more difficult it is to ‘predict the future.’”

As an example, SpartanNash has been using predictive analytics to better understand shopper preferences for promotions and products. “By leveraging our loyalty program data, we have been able to deliver more meaningful and relevant communications and offers to our shoppers,” Peters notes. “We have seen positive response both in sales and engagement from the consumer.”

Kroger’s Aggressive Stance

The Kroger Co. is taking an aggressive stance on predictive analytics, which is typical of its use of technology. The Cincinnati-based grocer is using a Queue Management solution from U.K.-based provider Irisys, to make sure shoppers never have more than one person ahead of them at checkout.

Meanwhile, Harris Teeter is using a Big Data analytics platform from Tresata, based in Charlotte, North Carolina, “to dynamically understand its product, customer and channel behaviors, in an effort to provide its customers better value across its online, mobile, social and brick-and-mortar channels.” Matthews, North Carolina-based Harris Teeter, now a wholly owned subsidiary of Kroger, began the program last year.

When online merchant FreshDirect, based in Long Island City, N.Y., was shopping for a new market, “they used predictive analytics to help them decide where to go, and ultimately chose Philadelphia as their second location,” notes Alan Lipson, global retail industry strategist at Cary, N.C.-based SAS.

Predictive Accuracy

Paul Scorza, CIO at Ahold USA, which operates from Carlisle, Pa., and Quincy, Mass., points out two current product examples where predictive analytics were used to inform current manufacturing and promotional efforts. One is the rapid growth of pedometers, based on an increased interest in fitness and the emergence of wristband units. “I believe that prediction is extremely accurate,” he says.

Another product more typically found on supermarket shelves is coconut oil in its many forms. “People put it on their skin; they put it on their food. There are all these uses for coconut oil, and a year ago, I didn’t even know what it was,” Scorza says. “Now you can’t keep it on the shelves. That’s an example of how a supermarket retailer would have used predictive analytics a year ago.”

Scorza pegs the general accuracy of predictive analytics at about 50 per cent, remarking, “That’s pretty good.” It may be somewhat lower in the retail environment, because of the difficulty in predicting consumers’ buying patterns, and the emergence of an entirely new cohort of shoppers, the Millennials.

“To me, the only predictive analytics that I would have a lot of faith in would be ones that are near-term, that are predicting current trends that are going on.” That is, predictive analytics based on three- to six-month-old data will be the most accurate for retailers, he notes.

“The potential for predictive analytics is significant. Equally significant is the plethora of information that is available to harness

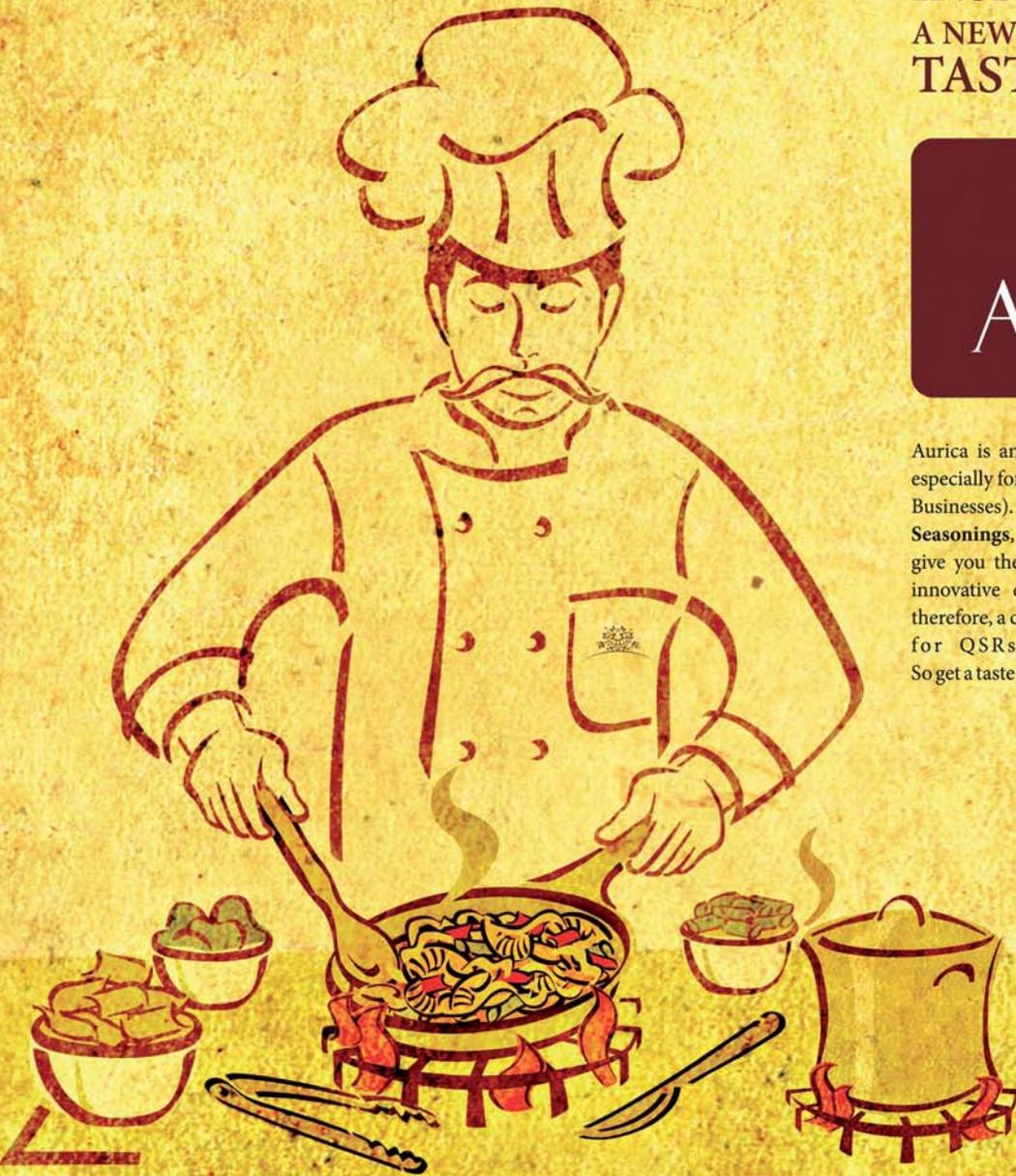
– Linh Peters, SpartanNash



INSPIRING A NEW MENU OF TASTY POSSIBILITIES



Aurica is an amazing new range of ingredients created especially for HORECA (Hotels, Restaurants and Catering Businesses). These premium, ready-to-use **Premixes & Seasonings, Spices, Dehydrated Vegetables and Herbs**, give you the freedom to create the most authentic and innovative delicacies, easily and in quick time. It is therefore, a chef's best friend, and also, a one-stop solution for QSRs and the food service industry. So get a taste of Aurica and give life to taste!



Dips



BBQ Seasonings & Marinades



Rice & Pasta



Sauces

Our Other Range of Products

- Dip's Premixes • Grilled and Tikka Bases • Coating Solutions
- Gravy Bases • Marinades
- & Breading Mixes • Soup's Premixes
- Sprinklers • Bakery Solutions



Saves
Time



Consistent &
Great Taste



Endless Menu
Possibilities

Paras Spices Private Limited

Regd. Office & Works: V.P.O., Khosa Pando, Zira Road, Moga-142001, Punjab, India. Ph.: +91 1636 237177
Corp. Office: 205 (2nd Floor), Bhikaji Cama Bhawan, Bhikaji Cama Place, New Delhi-110066, India. Ph.: +91 11 26162177
E-mail: welcome@parasspices.com • Web: www.parasspices.com

California Walnuts

Presenting new opportunities for the Indian Dry Fruit Trade

- California walnuts account for 99 percent of the commercial US supply and two-thirds of world trade. The Central Valley of California is the state's prime walnut growing region.
- Known worldwide for their excellent quality, these walnuts are grown and processed under the strict regulation of the California Walnut Board, USDA/DFA and the US Food and Drug Administration (FDA).
- Walnut consumption is increasing every day in India and California Walnuts provide the perfect avenue for Indian dry fruit trade to expand their product portfolio and meet this demand.



California Walnut Commission

651 Pace City-II, Sector 37, Gurgaon (HR), INDIA 122 004

Ph: +91(124)434-4500 • Fax: +91(124)434-4501 • www.californiawalnuts.in • walnuts@scs-group.com

Non-Discrimination Statement: In accordance with USDA, the California Walnut Board and California Walnut Commission prohibit discrimination in all programs and activities on the basis of race, colour, national origin, age, disability, sex, marital status, familial status, parental status, religion, sexual orientation, genetic information, political beliefs, reprisal, or because all or part of an individual's income is derived from any public assistance program. To file a complaint of discrimination, write to USDA, Director, Office of Civil Rights, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, or call (800) 795-3272 (voice) or (202) 720-6382 (TDD). California Walnut Board and California Walnut Commission are equal opportunity employers and providers. © 2008 EO/AA