

# Europe

---

Health & Sustainability:  
Where Two Worlds Collide

DECEMBER 2021

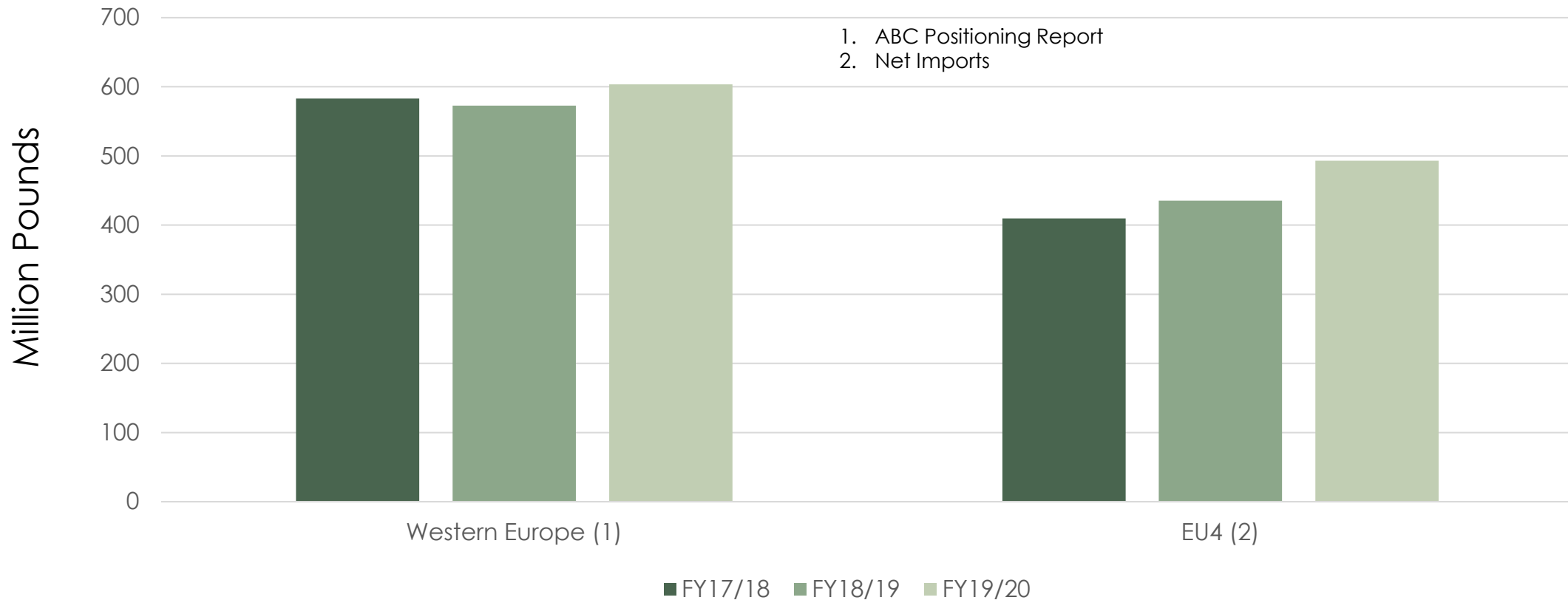


01

# Getting to Know Europe

# European shipments are large and growing

25% of Global Almond Shipments





## BAKERY



## MARZIPAN

Per capita consumption in Europe led the globe 20 years ago, supported by traditional consumption.

ALMOND SHIPMENTS (Lbs)  
per capita

	98/99
Germany	1.3
France	0.9
Italy	0.9
UK	0.3
United States	0.6

# But Eating Habits Are Changing

FROM



"Marzipan has a frumpy, slightly dowdy image."  
-Janine Judetzki, Lemke (manufacturer)

TO



"Usage in traditional bakery products is declining as consumers look towards healthier options."  
-Euromonitor Europe

## 10 healthy benefits of almonds

### Why almonds are a girl's best friend

By Mark Reynolds  
FORGET expensive anti-wrinkle creams... eating almonds leaves women's complexions smoother, experts say. Scientists gave one group of middle-aged women two 30g servings of nuts every day for 24 weeks. Another was served fig and granola bars. The facial lines of those who snacked on the almonds – around 20 a time – showed a 15 per cent improvement after 16 weeks. That nudged up to 16 per cent by the end of the trial, when skin tone was a fifth more even. Study boss Dr Raja Sivamani, a Californian dermatologist, said: "Daily consumption of almonds may be an

effective means of improving the appearance of facial wrinkles and skin tone among postmenopausal women."  
He stressed further research was now needed on a more diverse group of women. The research was published in the journal Nutrients.



Battle lines...nutty cure



Woman's Weekly

**Snack smart**  
A study from the British Journal of Nutrition on the 'post-lunch cognitive crash' (when memory and attention levels drop) found a high-fat lunch with almonds, which are high in magnesium, resulted in far smaller declines in memory scores, compared to a high-carb lunch without the nuts. It concluded eating almonds may help reduce the effect of lunch on memory decline.

Men'sHealth FITNESS MENTAL STRENGTH HEALTH NUTRITION WORKOUTS SUBSCRIBE

### Almonds Make You Look Younger, New Study Finds

In a nutshell, almonds can crack your fear of crow's feet. Time to add them to your kitchen cupboards

BY MEN'S HEALTH 30/04/2020



**GANZ SCHÖN KERNIG**  
Mandeln sehen zwar ein wenig schrumplig aus, sorgen aber für glatte Haut, haben Wissenschaftler festgestellt.  
» Hauterkrankungen können ganz schön nerven. Doch Forscher haben jetzt eine positive, simple und schnelle Möglichkeit gefunden, gegen Pickel vorzugehen: In Paketen einer halben, vierfünftel oder drei Viertel Liter Mandeln sind wichtige Pflanzenstoffe enthalten, die die Hauterkrankungen entgegenwirken. In Kombination mit Vitamin E, das häufiger als Vitamin A in der Haut vorkommt und auf diese Weise die Hauterkrankungen entgegenwirkt, haben Forscher festgestellt, dass Mandeln die Hauterkrankungen entgegenwirken können. In Kombination mit Vitamin E, das häufiger als Vitamin A in der Haut vorkommt und auf diese Weise die Hauterkrankungen entgegenwirkt, haben Forscher festgestellt, dass Mandeln die Hauterkrankungen entgegenwirken können.

Men'sHealth

STYLIST



### How eating nuts can help your body deal with stress

POSTED BY CHLOE GRAY FOR FOOD

A new study shows the impact that nuts have on our heart rate, and it's pretty impressive:

**N**uts are delicious. We eat them straight out of the packet, slather our butter on toast and love to grate them on salads. But did you know they're more than just a treat? They actually come with huge mental and physical health benefits.

A new study by Kings College found that by swapping typical snacks for almonds you

And how food is produced and the impact it has on the planet is becoming more important to how Europeans eat

## TOP 5 FACTORS INFLUENCING FOOD PURCHASES (%)

Taste

45

Food Safety

42

Cost

40

Where The Food Comes From

34

Nutrient Content

33

# AVOCADO, COCOA AND ALMONDS: THE 5 VEGAN FOODS THAT AREN'T AS ECO- FRIENDLY AS YOU THINK

Several plant-based foods have come under scrutiny lately due to reports claiming they are bad for the

Sustainability is  
table stakes in  
the EU



IS MILK BAD FOR YOU? THE  
TRUTH ABOUT DAIRY



**End of the avocado: why chefs are ditching the unsustainable fruit**

Give peas a chance - as well as pistachios, fava beans and pumpkin seed paste. These are just some of the ingredients being used to replace one of the world's most popular fruits



Our presence  
in Europe is  
pivotal  
at this time  
for California  
Almonds.

01

EU4  
COLLECTIVELY  
IS OUR  
LARGEST  
EXPORT REGION

02

OFFSET  
DECLINES IN  
TRADITIONAL  
CATEGORIES

03

INFLUENCE  
OF THE  
REGION:

- TRENDS
- FOOD
- MANUFACTURING
- SUSTAINABILITY





02

# ABC's Approach to Europe

# Our presence in Europe is pivotal at this time for California Almonds.

## PAN EUROPE

**1**

Monitor and be prepared for regulatory changes and developments

**2**

Inspire and educate Food Professionals

## UK, FRANCE, ITALY & GERMANY

**3**

Build love for almonds through health benefits

**4**

Educate about industry's sustainability journey

## EU Port Authorities



- EU Port Officials unaware of rules – Confusing PEC as a safeguard measure
- ABC webinars to educate Port Officials – Year 2

## Uneven Regulatory Landscape

Uneven  
implementation of  
rules – Inspections  
post-rejections,  
reprocessing options  
(Italy & Spain)

Product fate –  
Limited transition  
time of 6 months  
(MRLs)

New controls –  
Ochratoxin A (OTA),  
Heavy Metals (Pb, Cd)

# EU Farm to Fork 2030 Goals



**50%**  
reduction in  
chemical  
pesticide use

**20%**  
reduction in  
synthetic  
fertilizer use

“Promote  
sustainable and  
healthy food  
supply”

**25%**  
land under  
organic farming

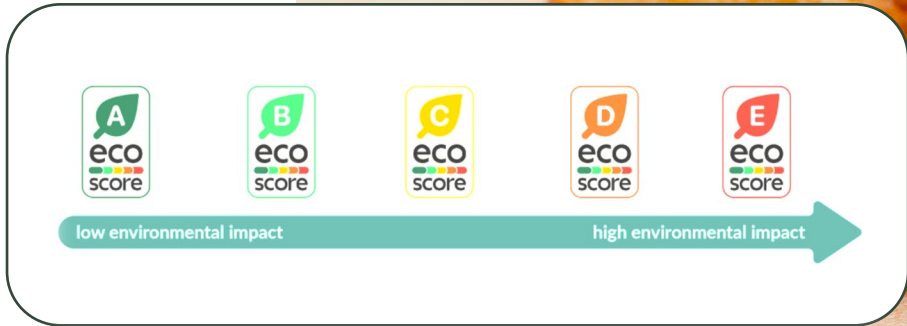
**50%**  
reduction in  
food loss

# What's Next?

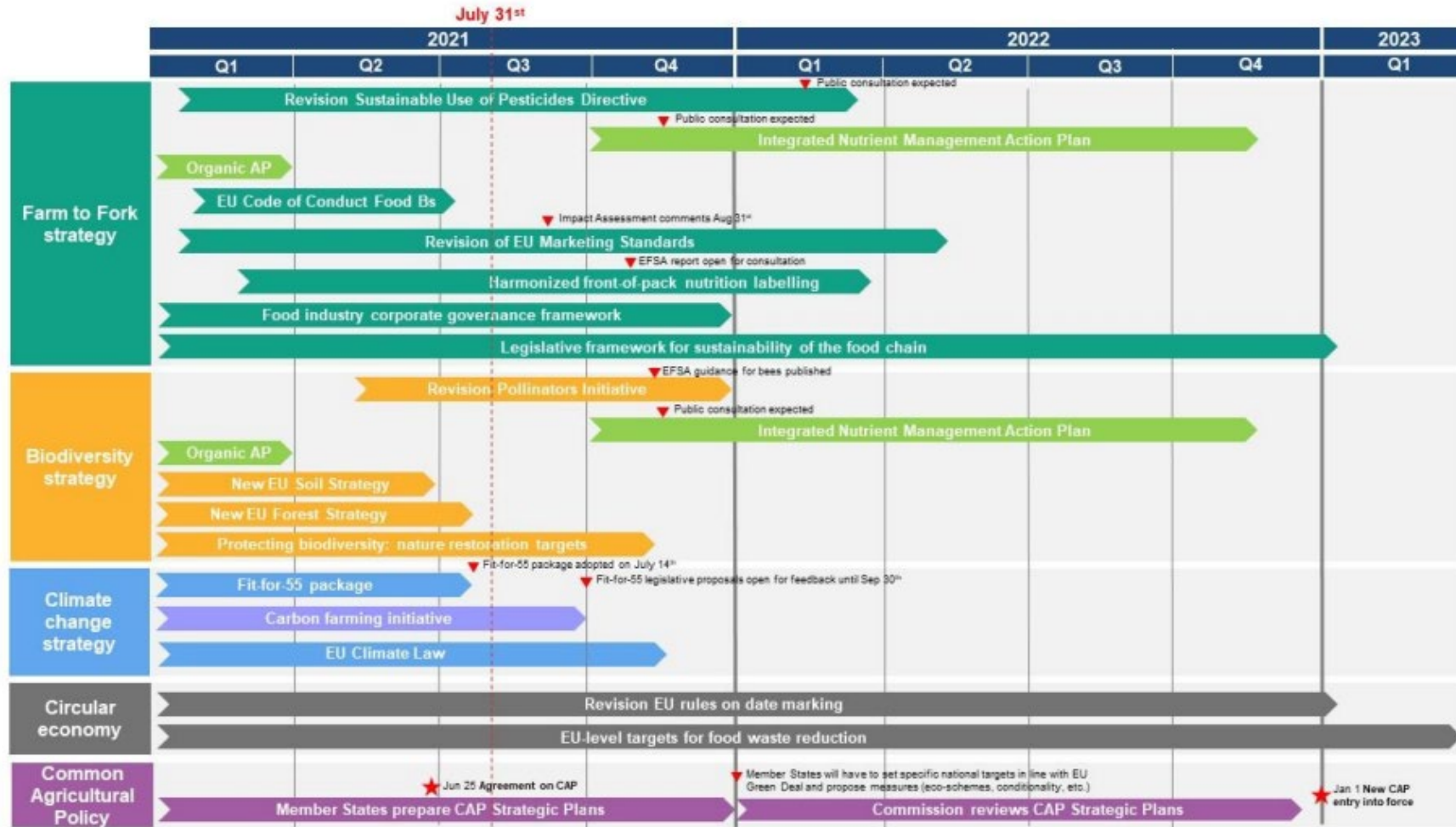
EU Farm to Fork initiative to drive more regulations

Pesticide Use: MRLs, registrations revoked; role of science? (Risk vs hazard criteria for plant protection products)

FOP Labeling: Health + Environment (carbon footprint) - Many unanswered questions



# Timeline for the implementation of the EU Green Deal



## Post Brexit



- UK starting to establish its own regulatory policies
- Separate monitoring of UK issues, independent of EU27 issues – pesticides, MRLs, marketing standards, import quotas, duties, labeling, etc.
- Separate customs control
- Country of Origin labeling issue – Implications for U.S. goods flow between UK and EU



## Key Takeaways



- Understand the broader environment driving regulations
- Things can change rapidly
- Staying engaged – From the beginning (EU early alert)
- Establish relationships with EU officials, FAS Posts, Port Authorities, local industry groups
- Leverage European support for European issues (Frucom, European Snacks Association, etc.)

# Our presence in Europe is pivotal at this time for California Almonds.

## PAN EUROPE

**1**

Monitor and be prepared for regulatory changes and developments

**2**

Inspire and educate Food Professionals

**3**

Build love for almonds through health benefits

**4**

Educate about industry's sustainability journey

## UK, FRANCE, ITALY & GERMANY

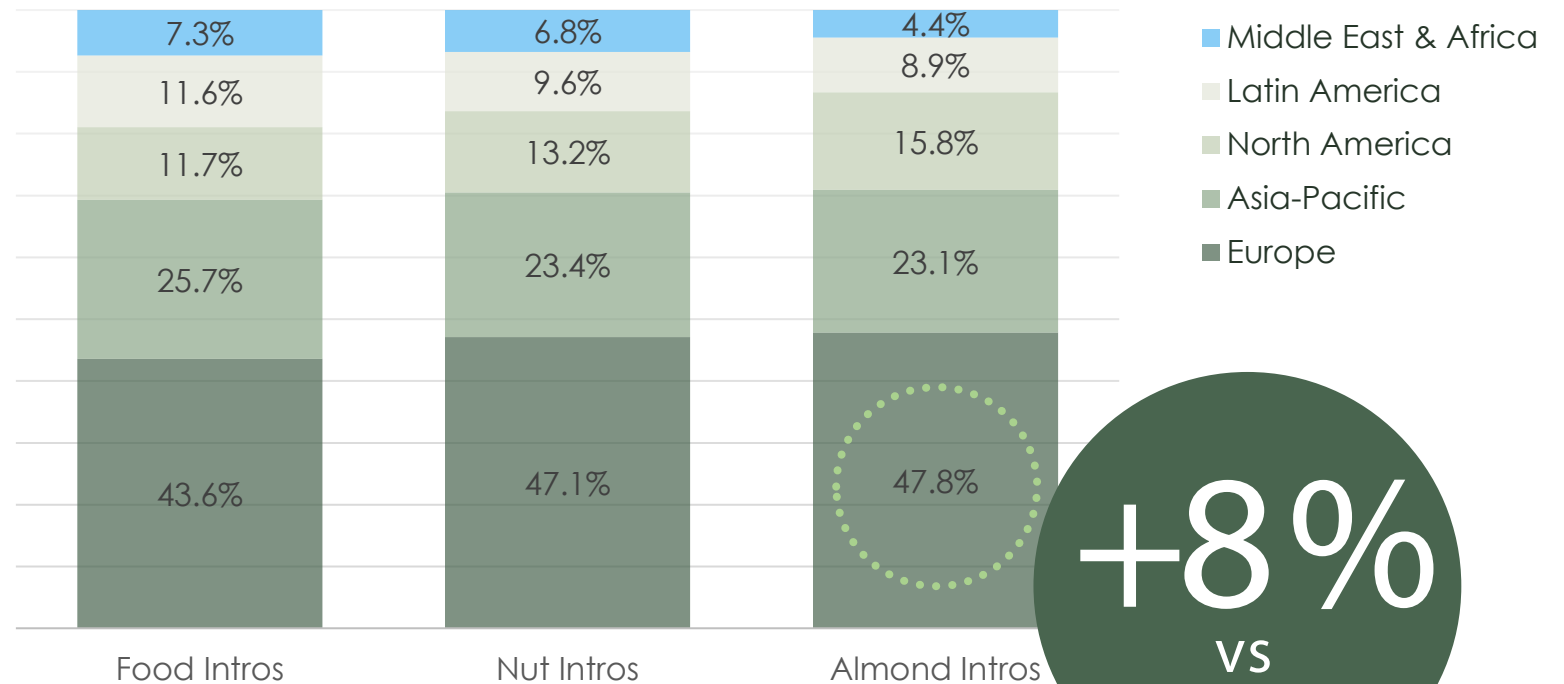
## Europe is a center for Global Innovation

### IMPACT

Europe introduced nearly 2X more almond products than any other region

## 2020 GLOBAL FOOD, NUT, AND ALMOND INTRODUCTIONS

Regional share



Europe is a center for  
Global Innovation

Europe leads  
the world in

6  
categories

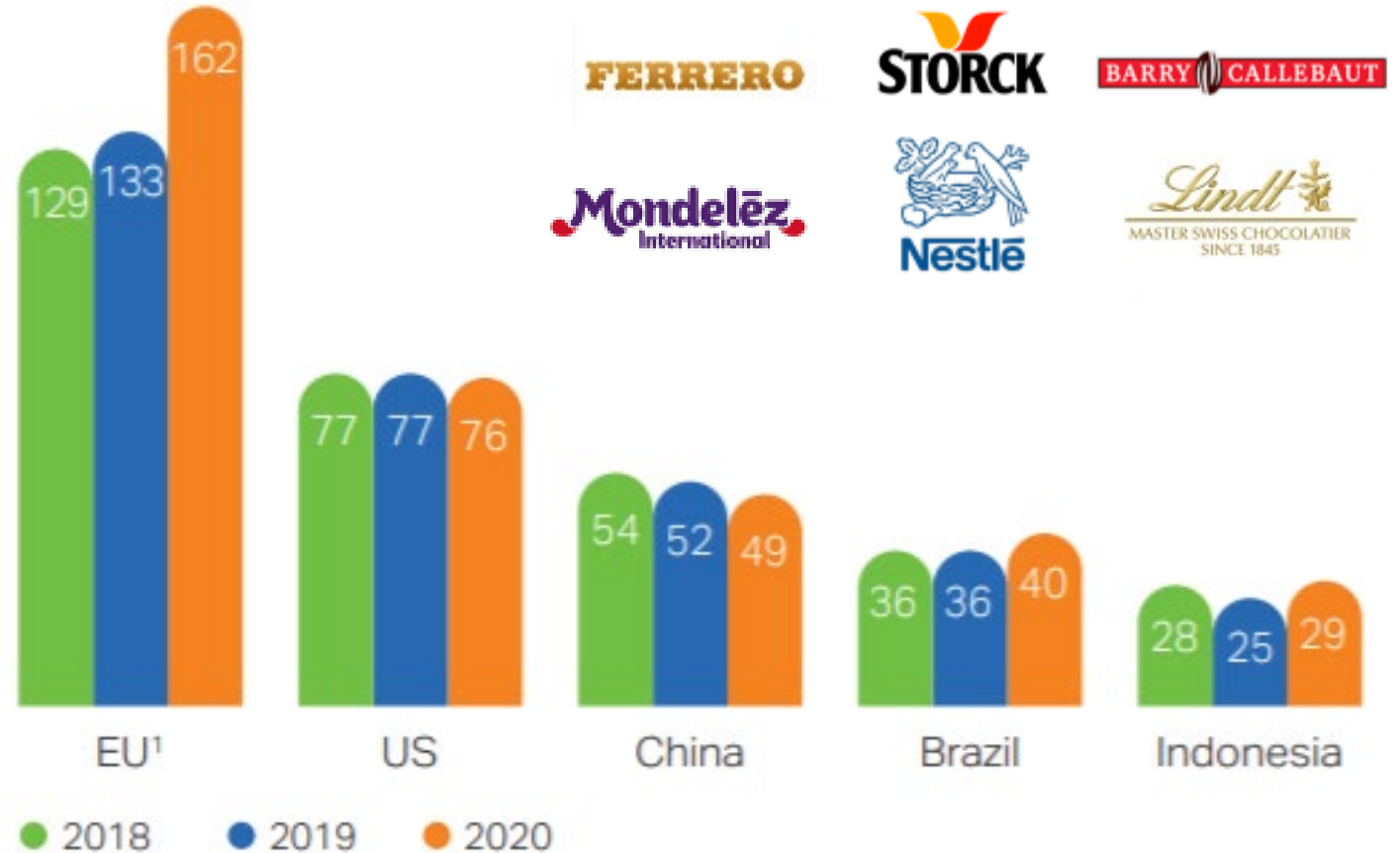


Europe is a center for  
Global Innovation

44%

of global  
new food intros  
were in Europe  
European  
Manufacturers'  
Influence Stretches  
Beyond Borders

## MAIN GLOBAL EXPORTERS OF FOOD AND DRINK PRODUCTS (\$ billion)

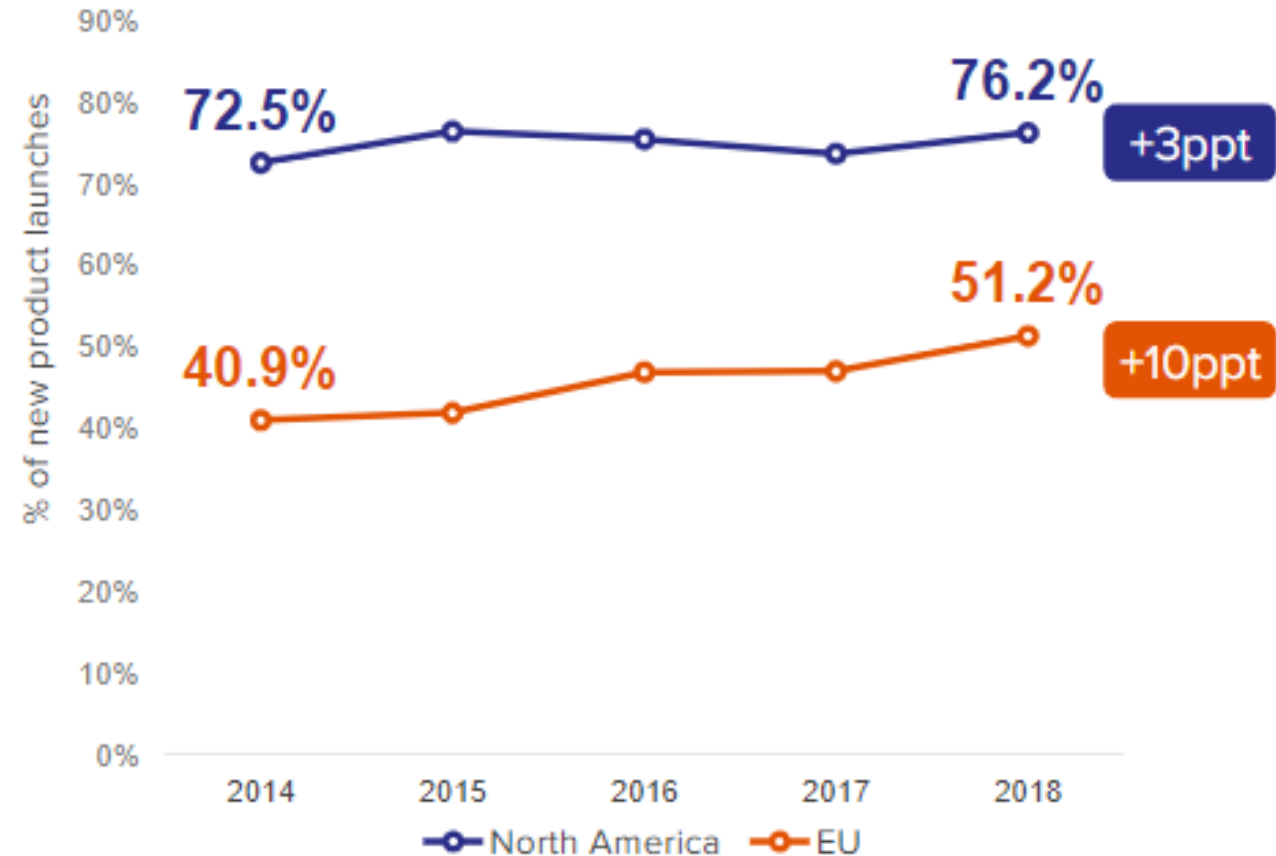


Source: UN COMTRADE

Almonds provide a strong health halo to introductions in Europe

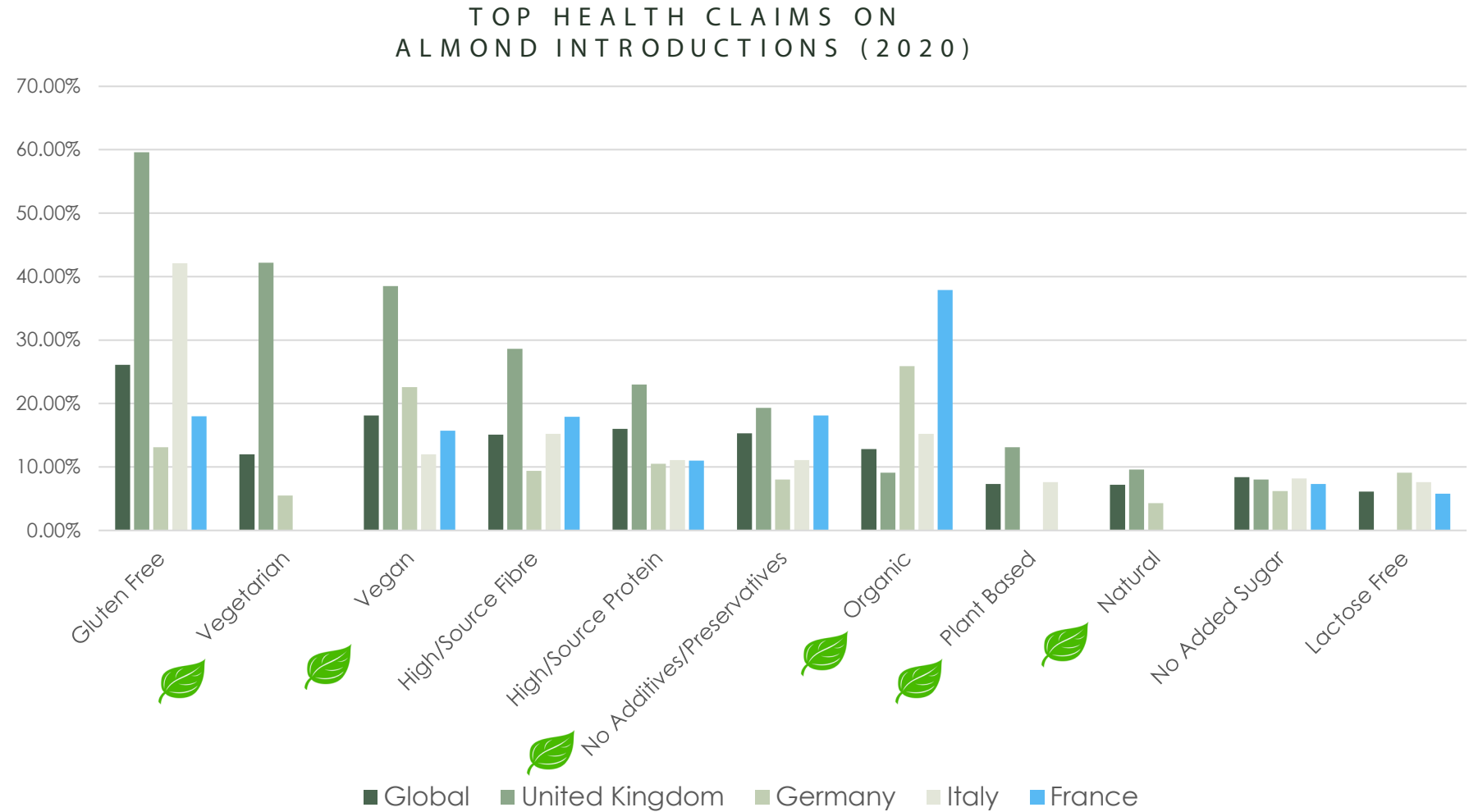
## Almond products featuring health claims rise

Percentage (%) of food and beverage launches tracked with almonds featuring a health claim by region



Source: Innova Market Insights

Almonds provide a strong health halo to introductions in Europe



Source: Innova Market Insights

# 03

## Where Health Meets Sustainability





A woman with long, straight brown hair and a friendly smile is the central focus. She is wearing a light-colored, textured top. Behind her is a white bookshelf with various books and a potted plant. To her right, a framed logo for 'Competitions' is visible, featuring a stylized apple with a leaf and the word 'Competitions' below it. The background is a plain, light-colored wall.

**SOPHIE MEDLIN**  
CONSULTANT DIETICIAN, CHAIR OF THE  
BRITISH DIETETIC ASSOCIATION IN LONDON

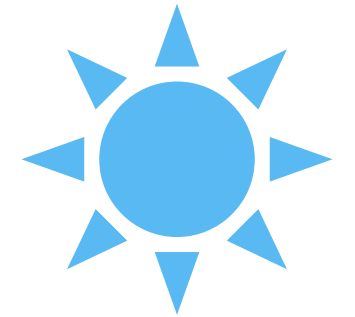


UK  
FRANCE  
GERMANY  
ITALY



## HEALTH

Build love for almonds  
through health benefits



## SUSTAINABILITY

Educate about industry's  
sustainability journey

Thus far  
Nutrition ranks  
higher than  
Sustainability.

### Almond Messages: % Selecting “Somewhat or Much More Likely to Eat Almonds” (Average across EU4)

Messaging Statement	2021 – EU4	Messaging Statement	2021 – EU4
Are good for your heart	76%	Keep you fuller for longer	71%
Contain good fats	74%	Are the most nutritious nut	71%
Help improve memory	74%	Are good for my hair	71%
Are good for digestive health	74%	Can help you manage your weight	70%
Can help maintain healthy cholesterol levels	74%	Are high in magnesium	70%
Offer a variety of nutrients	74%	Are the lowest calorie nut	69%
Provide me with energy through the day	74%	Are less oily than other nuts, making them easier to eat	69%
Are good for my skin	73%	Non-GMO	68%
Are high in vitamin E	73%	Can reduce wrinkles	67%
Are high in antioxidants	72%	Helps me be beautiful from the inside out	67%
Are high in protein	72%	160 calories per 23 almonds	61%
Are high in fiber	72%	Are available in a variety of flavors	58%
Are a source of plant-based protein	72%	Are good for people with diabetes	57%
Grown in a way that is good for the environment	72%	Are grown in California	41%

Source: Global Perceptions 2021

Sustainability  
is increasing  
in importance.

% Selecting "Grown in a Way that is Good for the Environment" as Somewhat or Much More Likely to Eat Almonds						
	2016	2017	2018	2019	2020	Change from 2016
UK	55%	58%	56%	68%	68%	+13%
France	65%	66%	70%	71%	75%	+10%
Germany	58%	64%	63%	64%	67%	+9%
Italy	-	75%	79%	81%	78%	+3%

Source: Global Perceptions 2016 - 2020

# Getting the balance right



# Our presence in Europe is pivotal at this time for California Almonds.



PAN EUROPE

- 1 Monitor and be prepared for regulatory changes and developments
- 2 Inspire and educate Food Professionals



UK, FRANCE,  
ITALY & GERMANY

- 3 Build love for almonds through health benefits
- 4 Educate about industry's sustainability journey

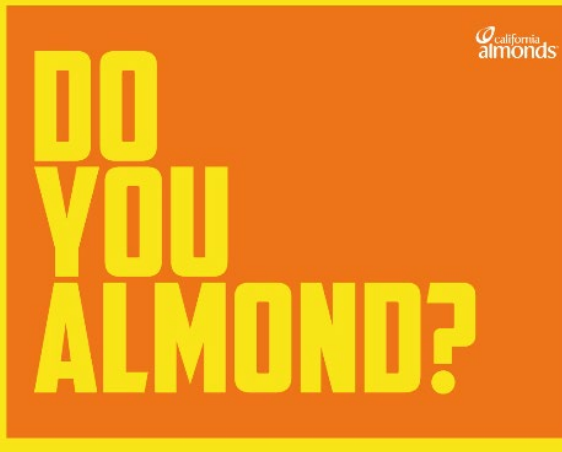
03

WHERE HEALTH MEETS  
SUSTAINABILITY

# Health is at the heart of all Almond communication



UK  
Do You Almond?



ITALY  
Recharge Your Day



GERMANY  
Snack the Sun



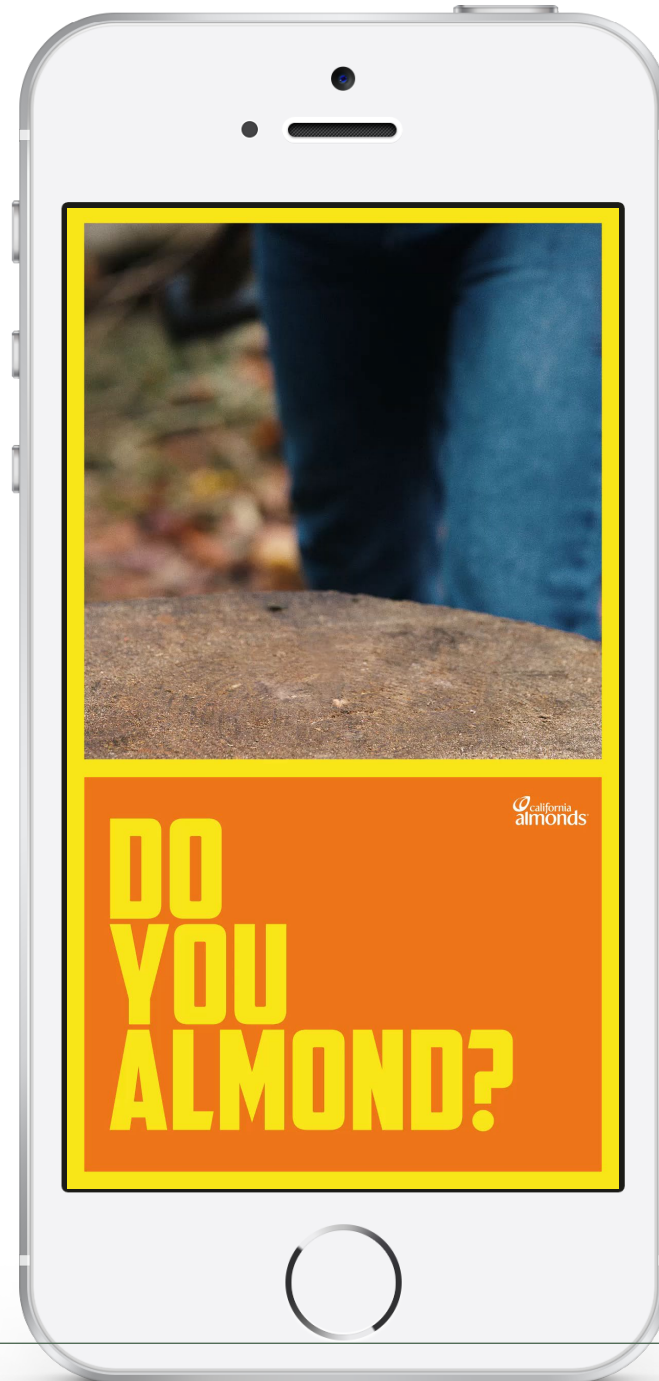
FRANCE  
(in development):  
A Pause with Almonds is  
a Pause above the Rest



03

WHERE HEALTH MEETS  
SUSTAINABILITY

UK CAMPAIGN:  
**Do You Almond?**





03

WHERE HEALTH MEETS  
SUSTAINABILITY

## GERMANY CAMPAIGN: Snack the Sun



ITALY CAMPAIGN:  
**Recharge Your Day**



03

WHERE HEALTH MEETS  
SUSTAINABILITY

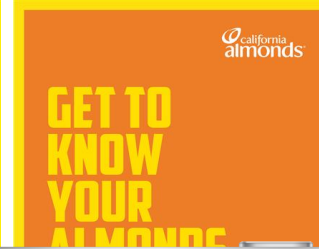
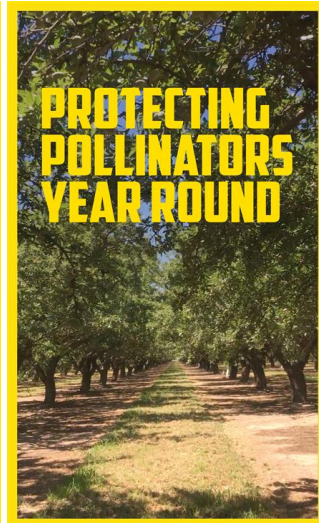
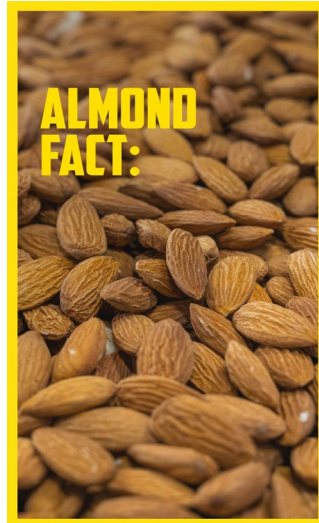
---

FRANCE CAMPAIGN:  
**New Campaign**

**LAUNCHING  
SPRING 2022**



We communicate about our sustainability journey to protect against reasons not to eat almonds



GROWING GOOD

### Almonds, Health + Sustainability: Behind the Headlines

**Keto, Vegetarian, Paleo, Flexitarian...**

However you choose to eat, almonds are the perfect addition to a healthy diet and are packed full of nutritional benefits such as B vitamins (B2, B3, B1 and B9), magnesium, fibre and plant-based protein.

But for many of us, it's not enough anymore to just eat foods that are good for us. We want our food choices to be good for the planet too.

While determining if a food is healthy is fairly simple, it's not always the case when it comes to a food's sustainability credentials. In fact, it's a pretty complex and confusing area. Which is why we've asked third-generation almond farmer and the Almond Board's Senior Sustainability Manager, **Danielle Veenstra**, to take a look behind the headlines and give you the inside scoop on how California almonds are grown.

PIENE DI BONTÀ NATURALE E COLTIVATE SOSTENIBILMENTE

california almonds  
Almonds.it





# Consumers

INFLUENCERS



**STAR BURST**  
EATING 30g of almonds – about 20 – every day can reduce wrinkles in middle-aged women, according to a US study published in the Nutrients journal.

MEDIA OUTREACH

...ICA L'ENERGIA



...DELLA TUA GIOP

ADVERTISING

# Health Professionals

NUTRITION BULLETINS



ALMOND ACADEMY



PATIENT CAMPAIGN



EVENTS



PARTNERSHIPS



MEDIA



## Europeans' affinity for almonds is growing

### FRANCE

- #1 healthiest nut
- #1 nut eaten as a snack
- #1 nut positive story recall
- #1 average consumption
- #1 baking association

### UK

- #1 healthiest nut
- #1 eaten in other foods
- #1 nut positive story recall
- #1 baking association
- #3 nut eaten as a snack

### GERMANY

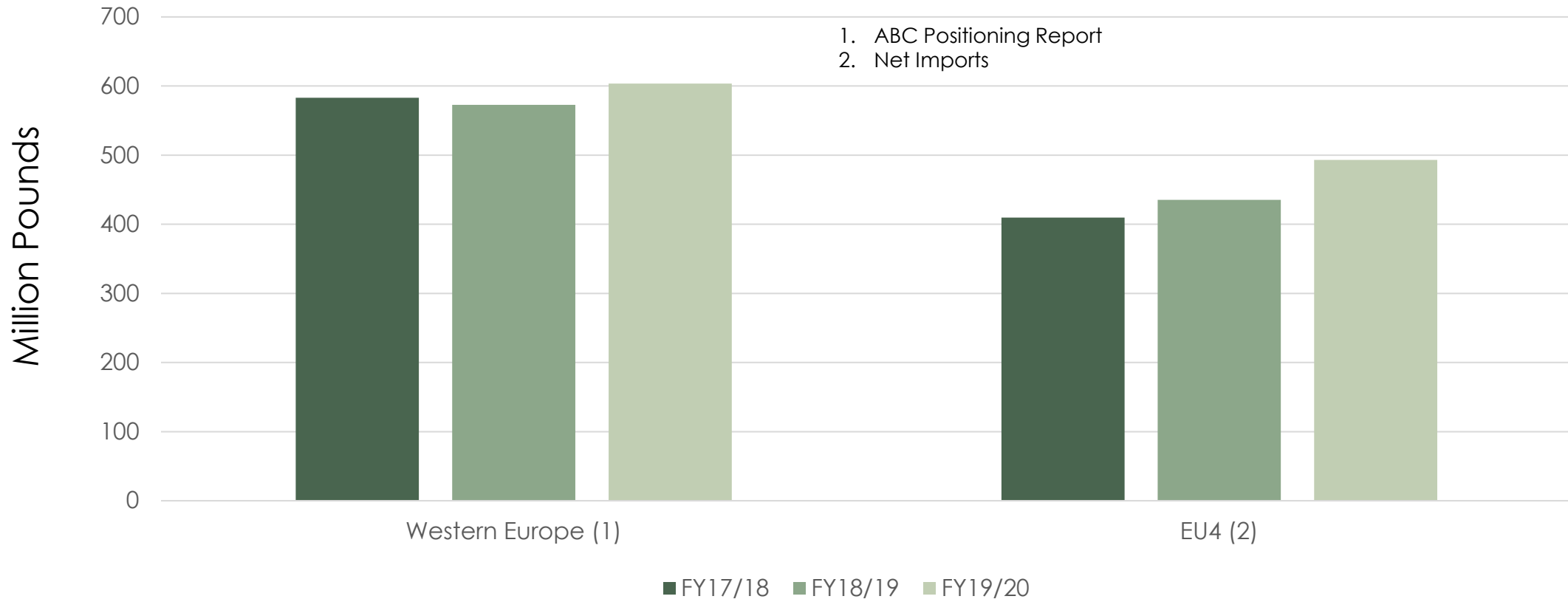
- #1 eaten in other foods
- #2 healthiest nut
- #2 nut positive story recall
- #5 nut eaten as a snack

### ITALY

- #1 nut for top-of-mind awareness
- #1 nut eaten as a snack
- #2 healthiest nut
- #1 baking association

# European shipments are large and growing

25% of Global Almond Shipments





## WHAT'S NEXT

KEEP BUILDING THE  
HEALTH HALO

TALK LOUDER  
ABOUT OUR  
SUSTAINABILITY  
JOURNEY

INSPIRE FOOD  
PROFESSIONALS TO  
USE ALMONDS



# Questions?