



2018

THE ALMOND CONFERENCE

ALMONDS IN THE GLOBAL MARKETPLACE

ROOM 314 | DECEMBER 4, 2018



Continuing Education Units (CEU's)

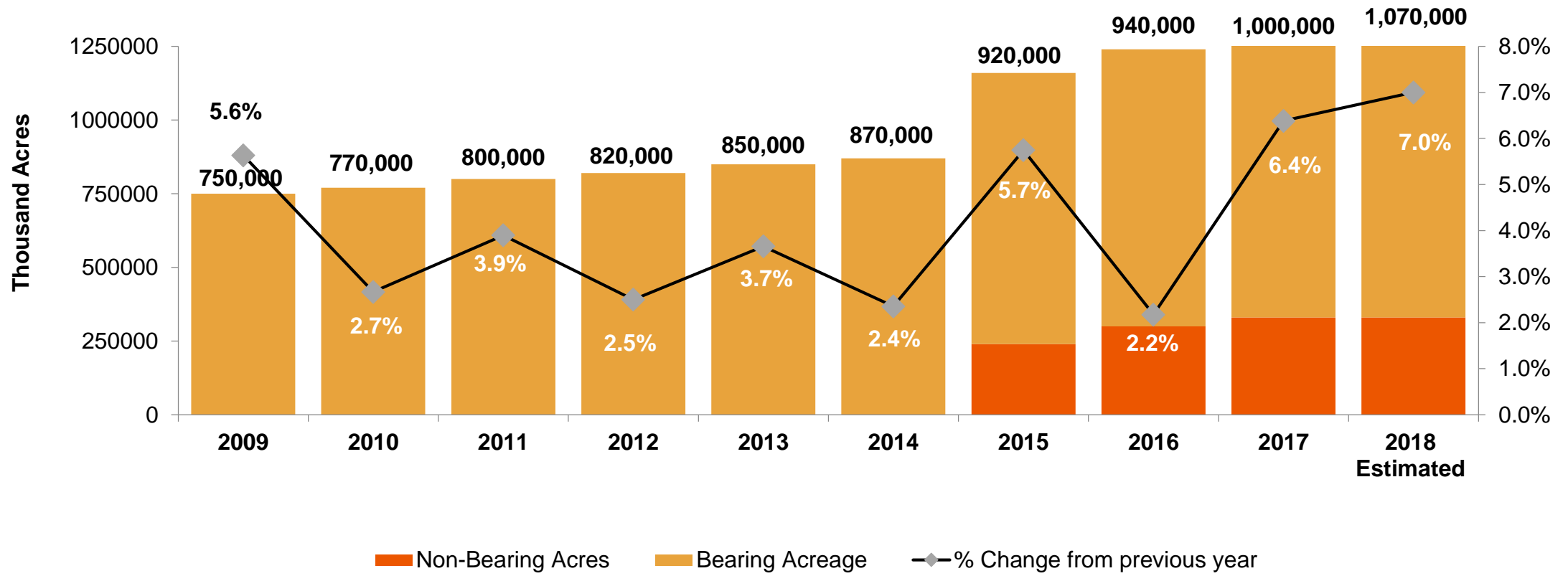
- **What type of CEU's are offered at conference?**
 - Tuesday – Certified Crop Advisor (CCA)
 - Wednesday – Certified Crop Advisor (CCA)
 - Thursday – Certified Crop Advisor (CCA) and Department of Pesticide Regulations (DPR)
- **Where are the CEU sign in sheets?**
 - CEU sign in sheets will be in the back of each session
 - There are separate forms on Thursday for the CCA and DPR credits
- **Special instructions for Thursday**
 - PCA's will need to pick up their scantrons in the morning before the first session of the day. They will also need to return the scantron at the end of the day to the CEU booth. This is in addition to signing in and out of each session.

AGENDA

- **Emily Fleischmann**, Almond Board of California, moderator
- **Laurel Muir**, Sterling-Rice Group

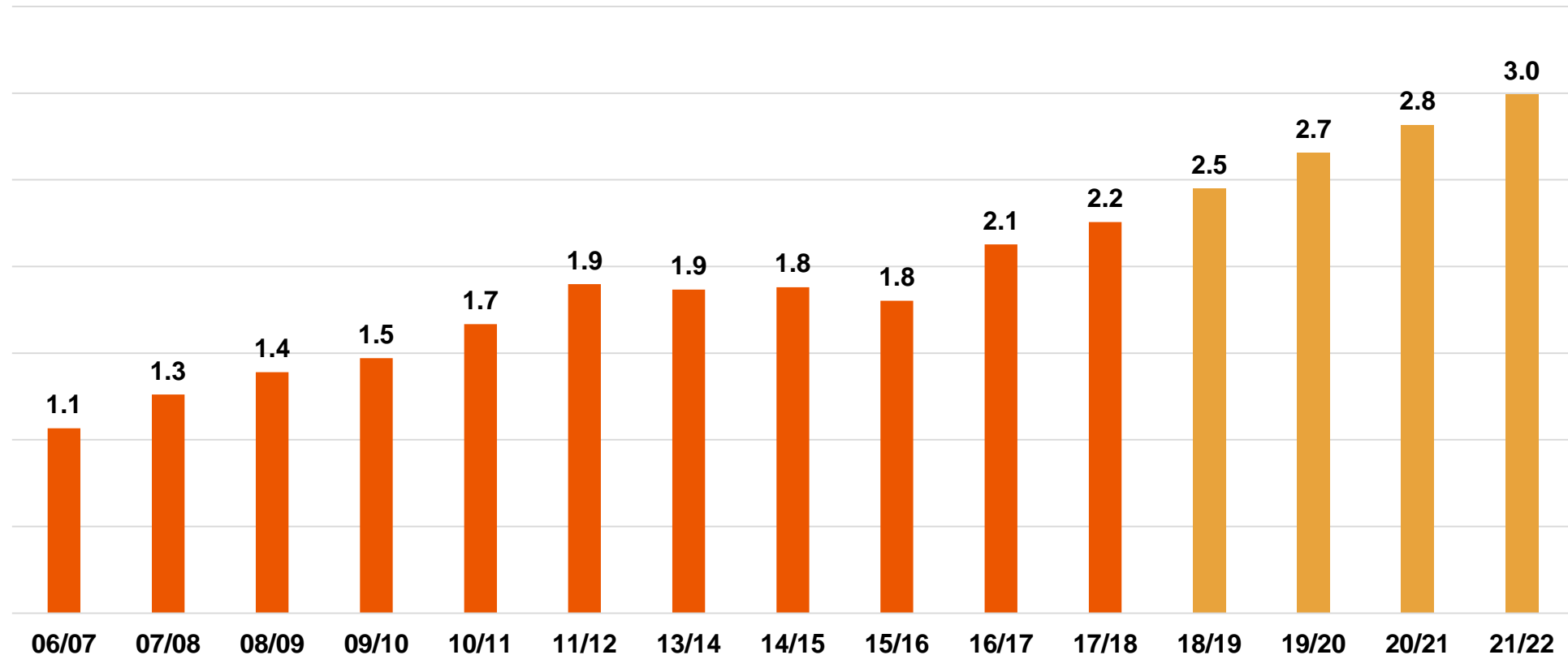


CALIFORNIA ALMOND ACREAGE



CALIFORNIA ALMOND PRODUCTION

FY2006/2007 – FY2021/2022 Actual/Projections (Billion Pounds)





+30%

+700

**Million pounds
increase in supply**

CY 17/18 – CY 21/22

ALMOND BOARD MARKETING OBJECTIVES

- **Build long-term world-wide demand for California almonds**
- **Create an environment in which almond perceptions and almond brands thrive**
- **Run interference and seize opportunities that are best handled at an industry-wide level**
- **Contribute to the financial well being of the industry**

MARKETING APPROACH

- 1. Invest and develop foundational platforms for industry long-term growth**
- 2. Disciplined, data-driven strategic approach to market development**
- 3. Highly creative, targeted, best-in-class marketing programs**

GLOBAL MARKETING OVERVIEW

NORTH AMERICA

Canada
U.S.
Mexico

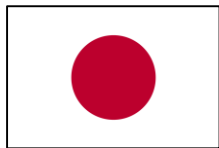


EUROPE
UK, France,
Germany,
Italy

**EXPLORATORY
MARKETS**
Brazil, Chile, Argentina

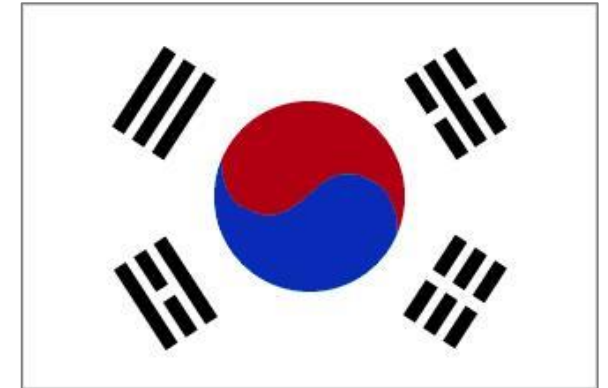
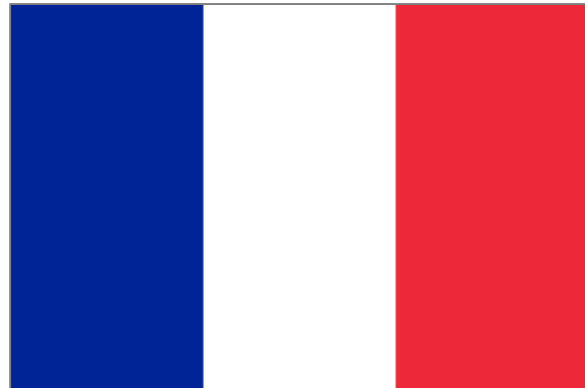
ASIA
China, India,
S. Korea, Japan

EXPANSION INTO NEW MARKETS



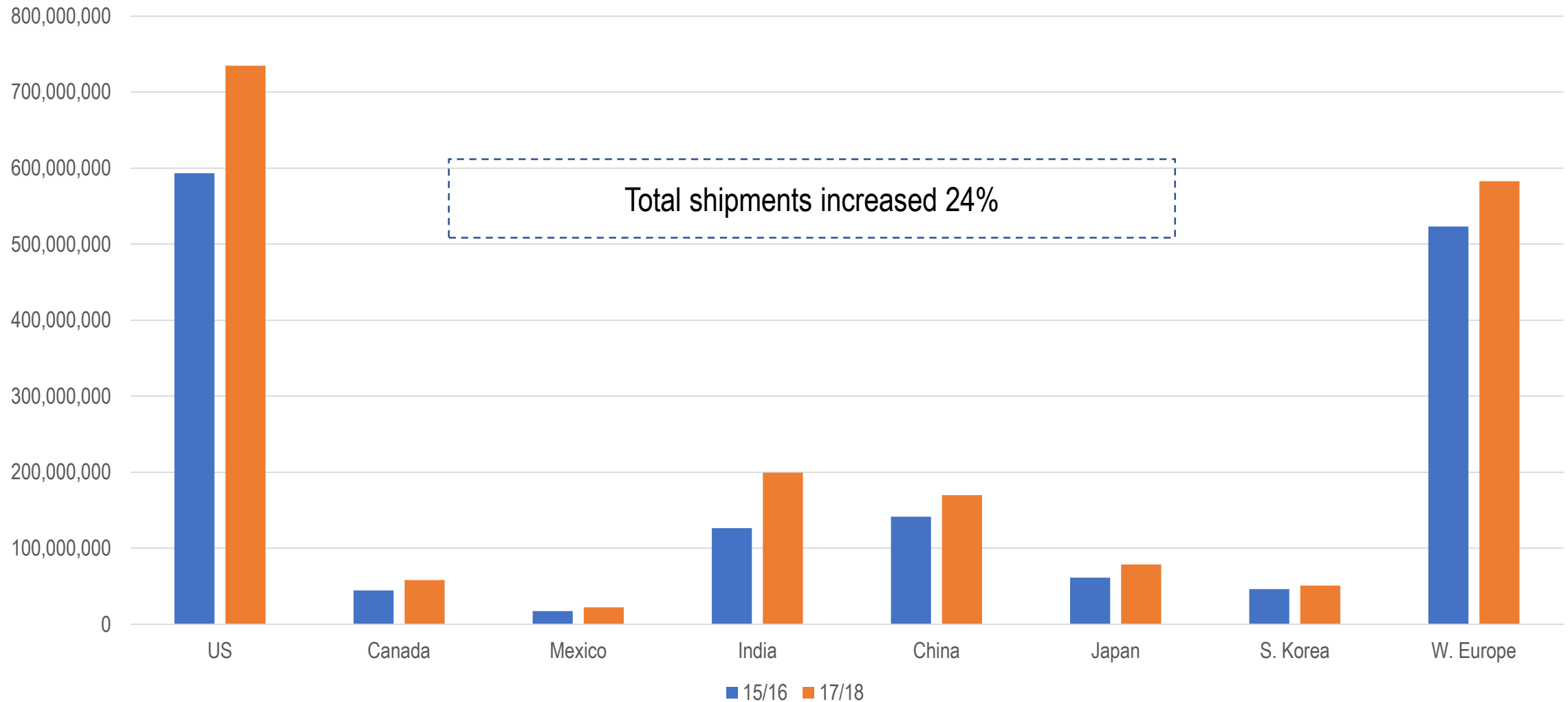
**South
America**

INCREASING CURRENT MARKETS



INCREASING SHIPMENTS

Shipments FY15/16 vs. 17/18



A landscape photograph featuring a field of tall, golden-brown grass in the foreground. A single, thin tree with green leaves stands on the left side. The sky is bright blue with scattered white clouds. Overlaid on the sky are numerous thin, white, curved lines that represent wind patterns or air flow. Two orange rectangular boxes with white text are positioned on the right side of the image.

HEADWINDS

AND TAILWINDS

A landscape photograph featuring a single tree on the left and a field of tall grass in the foreground. The sky is bright blue with scattered white clouds. Overlaid on the sky are numerous thin, white, curved lines that represent wind patterns or air flow, curving from the top left towards the right. A semi-transparent orange rectangular box is positioned in the middle-right of the image, containing the text 'HEADWINDS' in white, bold, uppercase letters.

HEADWINDS



#1 BIG FOOD UNDER FIRE

New demands for...
trust and
transparency
food safety
food quality

#2 GRASPING FOR THE FUTURE





#3

Trade

Disputes

Challenge

World Order

GLOBAL TRADE ISSUES ARE COMPLEX AND VARIED....

- In most markets, almond tariffs have not been excessive....
- Technical and Sanitary/phytosanitary barriers are the real concern, and harder to address.....
- “Rules-Based” and “Scientifically-Supported” do not always rule the day.....
- Political tensions and economics will always play a role.....



#4 ELEVATED DEFINITION OF HEALTH

INGREDIENTS UNDER FIRE

Deboned Chicken, Chicken Meal, Turkey Meal, Potatoes, Peas, Tomato Pomace, Dried Ground Potatoes,

Ground Yellow Corn, Chicken By-Product Meal, Corn Gluten Meal, Whole Wheat Flour, Animal Fat, Preserved with Mixed-Tocopherols (form of Vitamin E), Rice Flour, Chicken, Soy Flour, Water, Propylene Glycol, Tricalcium Phosphate, Salt, Phosphoric Acid, Animal Digest, Calcium Phosphate, Potassium Chloride, Sorbic Acid (a Preservative), Dried Carrots, Dried Tomatoes, Avocado, Calcium Propionate (a Preservative), Calcium Chloride, L-Lysine Monohydrochloride, Added Color (Yellow 5, Red, 40, Blue 2, Yellow 6), Vitamin E





#5
The playing
field is
changing





A landscape photograph featuring a single tree on the left and a field of tall, golden-brown grass in the foreground. The sky is a vibrant blue with scattered white clouds. Overlaid on the sky are numerous thin, white, curved lines that suggest the direction and flow of wind. A prominent orange-to-red gradient rectangular box is positioned on the right side of the image, containing the text 'TAILWINDS' in white, bold, uppercase letters.

TAILWINDS

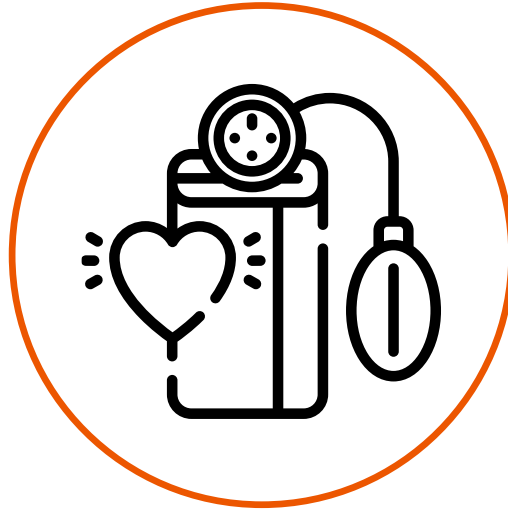
1 Health





592
MILLION

Diabetes is expected to affect 592 million adults by 2035



1.1
BILLION

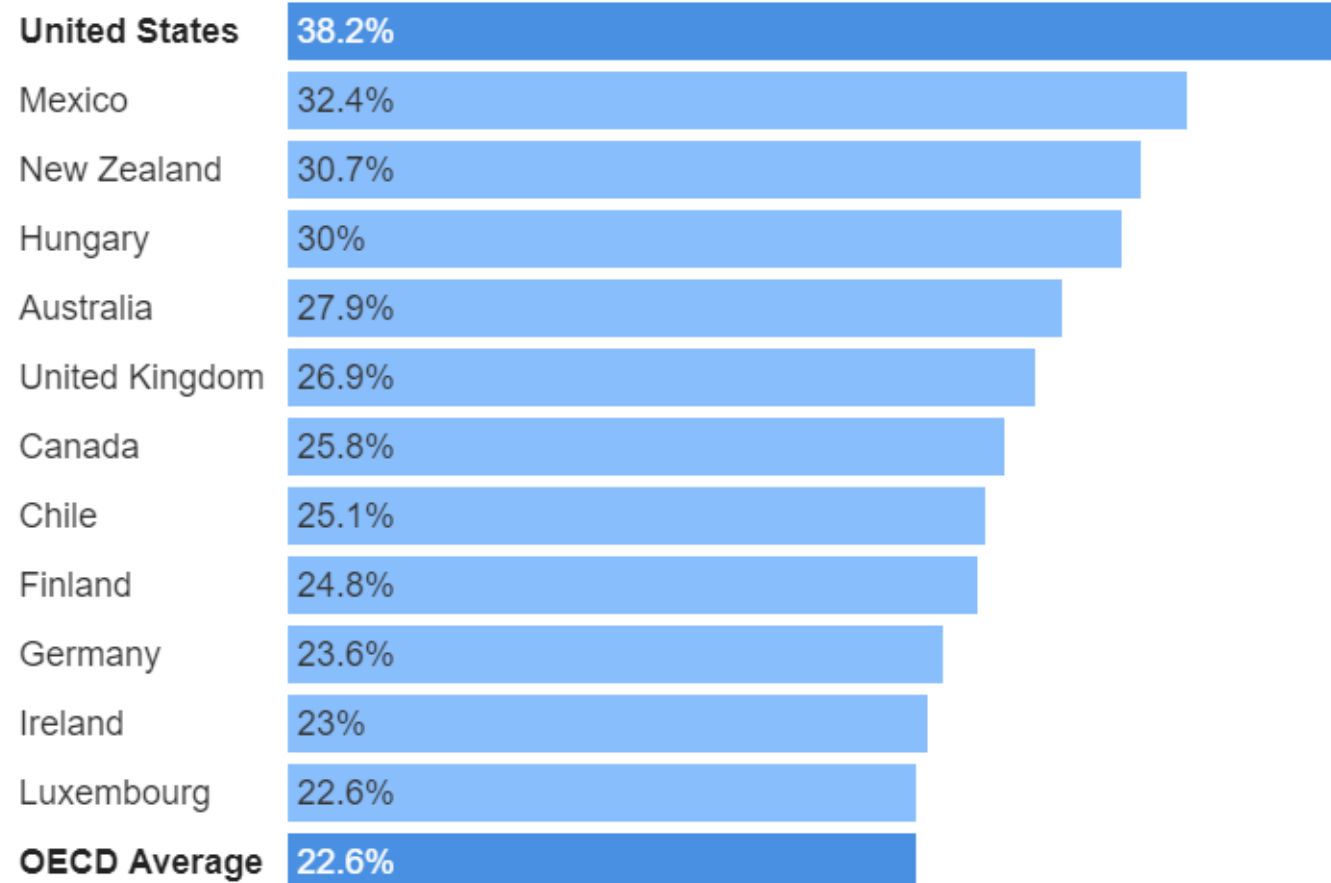
1.1 billion adults have high blood pressure. Less than 1 in 5 have it under control.



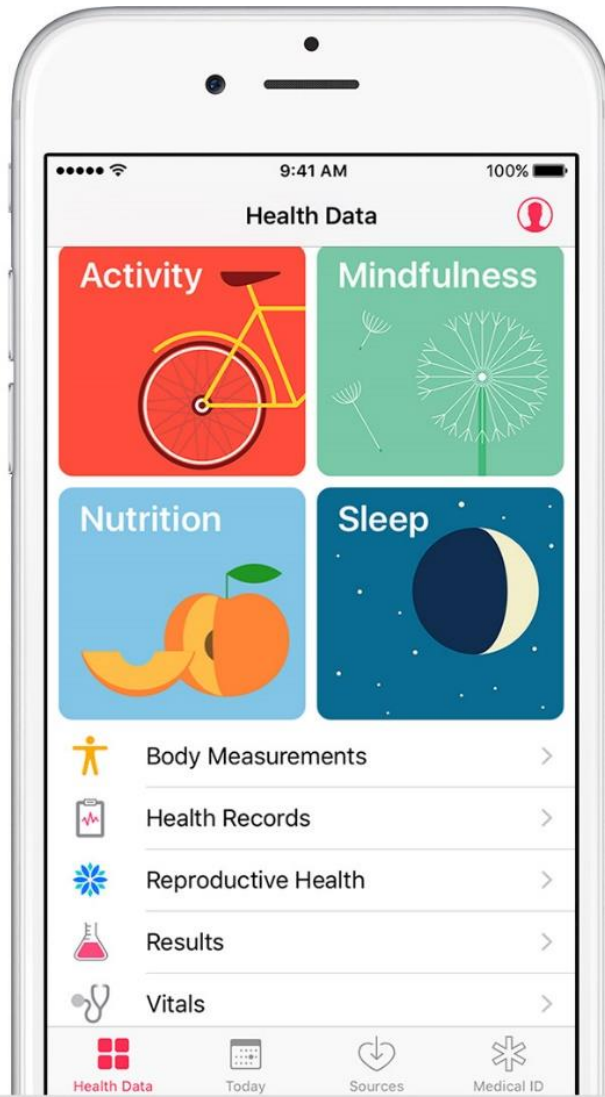
31%
OF DEATHS

17.9 million people die every year from cardiovascular disease. 31% of global deaths.

ONE-FIFTH OF THE WORLD IS OBESE



LOOKING TOWARD NEW SOLUTIONS



Food As Medicine: It's Not Just A Fringe Idea Anymore

January 17, 2017 · 10:08 AM ET

DAVID GORN



GYM MEMBERSHIPS NEW STATUS SYMBOL IN INDIA AND CHINA

Fit and fine: Retail market for fitness in India likely to touch Rs 7,000cr by year-end

ET Bureau | Sep 12, 2017, 02:14 PM IST



Save



TOPIC LUXURY IN CHINA

What's China's new luxury status symbol? A curvy butt

Memberships of high-end gyms – and social-media posts of toned people breaking a sweat – soar as fitness seen as aspirational must-do activity

BY THE LUXURY CONVERSATION
10 MAY 2018

SHARES



MAKING THE LIST

The 30 Healthiest Foods



Christopher Baker

FILL UP!

The 43 Best Foods for Fiber

It helps fill you up, can clean you out, and makes achieving your weight loss goals a whole lot easier—we're talking about foods with fiber.

BY THE EDITORS OF EAT THIS, NOT THAT!

AUTHORITY NUTRITION

✓ Evidence Based

20 Delicious High-Protein Foods to Eat



Health » Food | Fitness | Wellness | Parenting | Vital Signs

Live TV

U.S. Edition +



Why your diet should include more fat

By Mallory Creveling for Life by Daily Burn

Updated 2:12 PM ET, Fri December 8, 2017



India


FEMINA हिन्दी বাংলা

FASHION RELATIONSHIPS BEAUTY BRIDES WELLNESS CELEBS LIFE

Home » Wellness » Health » Why You Should Eat Almonds Every Day


Why you should eat almonds every day

by Annabelle D'Costa | January 22, 2018, 12:00 AM IST



Apart from adding a crunchy taste to your desserts and enhancing the flavour of the otherwise boring glass of milk, almonds have much more to offer. There are obviously a host of reasons why we were always asked to eat a handful of these wonder nuts on a daily basis. From promoting overall well-being to helping you get a perfect complexion, these nuts do it all. And here's why you should get munching on them rn!

Rich in antioxidants




FT

From Oats to Dark Chocolate: Six Foods To Keep Your Heart Healthy

KAVITA DEVGAN | 62H 52M AGO CHEW ON THIS 5 min read

SHARE, SAVE, COMMENT

2. Almonds to Raise Good (HDL) Cholesterol



(Photo: Shutterstock)

HDL works like a garbage bag; it gathers cholesterol from the arteries, and helps to transport it out of the body. Eating a small serving of almonds (about eight kernels) daily is enough to raise HDL levels by as much as 16 per cent after 12 weeks, according to research published in the Journal of Nutrition.

Why Almonds?

Almonds pack in fats too but most of it is unsaturated, particularly MUFA, which is great for our heart (lowers bad cholesterol and increases the good one). E and magnesium prevent heart attacks, and folic acid stops fatty plaque buildup in arteries.

Make it Exciting

Munch them raw, spread almond butter on bread, or add some flakes to your salads, oats, yogurt and soups.

How much? A handful a day is all you need!

health अपडेट

स्वस्थ रहने के लिए डाइट में शामिल करें

ये फूड्स



सोया प्रोडक्ट लें : डाइट में सोया प्रोडक्ट को शामिल करने से भी आप फिट रहेंगे। सोयाबीन प्रोटीन, आयर्न और विटामिन बी का एक नेचुरल स्रोत है। एक कप सोयाबीन के सेवन से आपको 29 ग्राम प्रोटीन और 9 ग्राम आयर्न मिलता है। इसके लिए सोया मिल्क और टोफू अच्छे विकल्प हो सकते हैं।

तुलसी और कालीमिर्च : फिट रहने के लिए प्रतिदिन सुबह तुलसी के 10 पत्ते और 5 काली मिर्च चखनी चाहिए। इससे सर्दी-जुकाम, अस्थमा, सांस की बीमारियों से छुटकारा मिलता है। इतना ही नहीं, तुलसी-कालीमिर्च के सेवन से दिल की बीमारियों को आशंका भी कम हो जाती है। इसलिए इन दोनों का भी सेवन करें।

हरी सब्जियां खाएं : हरी साग-सब्जियां सेहत के लिए बहुत फायदेमंद होती हैं लेकिन पालक का सेवन करना सबसे ज्यादा जरूरी है। एक कप पालक में पांच ग्राम प्रोटीन, 6 ग्राम आयर्न, विटामिन बी, कैल्शियम और 41 कैलोरी व कई सारे मिनरल्स पाए जाते हैं। महिलाओं को भी विशेषतौर पर पालक का सेवन करना चाहिए।

सहस्रसुत : सहस्रसुत प्राकृतिक एंटीऑक्सीडेंट है। येना कुछ खाली पेट सहस्रसुत खाने से कई रोगों को रोकथाम होती है। सहस्रसुत की 2 बरती रात के समय भोजन के साथ लेने पर यूरिक एसिड, हार्ट डिजीज, जोड़ों का दर्द और कैंसर का रिस्क कम होता है।

बादाम : बादाम न केवल प्रोटीन और फाइबर के ही स्रोत होते हैं, बल्कि इनमें खूब सारा कैल्शियम, एंटी-ऑक्सीडेंट और विटामिन ई भी होता है। इसे खाने से दांत और हड्डियों को ताकत मिलती है। इतना ही नहीं, फाइबर होने की वजह से यह हार्ट के लिए भी अच्छे माने जाते हैं।

THE **NEW** INDIAN EXPRESS

Tuesday, November 27, 2018 04:30:44 PM

NATION WORLD STATES CITIES BUSINESS SPORT ENTERTAINMENT GALLERIES

Home » Cities » Bangalore

Cut down your sugar levels with these superfoods

Keeping a check on your blood sugar and preventing diabetes is the deepest worry for every individual suffering from the disease.

Published: 15th November 2018 12:10 AM | Last Updated: 15th November 2018 07:40 AM



By Dr Anantha Padmanabha
Express News Service

BENGALURU: Keeping a check on your blood sugar and preventing diabetes is the deepest worry for every individual suffering from the disease. Being cautious about everything you eat is the saddest thing anyone can witness especially when you are a foodie. What if you can manage your blood sugar and say bye to diabetes by eating the right kind of food? Here are certain food products packed with wholesome nutrients that can help in normalising blood sugar levels and solving the complicated process of managing your diabetes.

Almonds
Consume a handful of soaked almonds. You can soak the almonds overnight. They are richer in nutrients than the non-soaked ones. They help in lowering and maintaining glucose levels, fight bad cholesterol and increase good cholesterol in the body, thereby, keeping your heart healthy.

China

10 types of Super Foods that keep you healthy in Winter

常吃这10种食物,让你身体更健康

5天前·但是,通过食用正确的食物可以对抗冬季的影响。以下是在冬季饮食中包含的10种超级食品。它们不仅味道鲜美,而且还能为你提供所需的重要营养素。1...
<https://baijiahao.baidu.com/s?...> - 百度快照

常吃这10种食物,让你身体更健康

向日葵健康课堂
 百家号 11-22 16:59

这个超级食物让这个冬天保持健康

在漫长而严酷的冬季保持自己的强壮和健康,至少可以说是彻头彻尾的挑战。寒冷的冬天不仅会对免疫系统产生不良影响,而且对皮肤也会非常刺激。但是,通过食用正确的食物可以对抗冬季的影响。以下是在冬季饮食中包含的10种超级食品。它们不仅味道鲜美,而且还能为你提供所需的重要营养素。



4. 巴旦木

这些小坚果富含抗氧化剂,可以抵抗任何削弱免疫系统的自由基。它们还含有蛋白质、镁、纤维、钙、B族维生素、钾、锌、铁、磷和健康脂肪。维生素E有助于滋养肌肤,保护肌肤免受紫外线伤害。

China

7 kinds of common nuts that have anti-cancer effects

常见的7种坚果具有防癌抗癌功效



2018年9月27日·很少有人把坚果作为主要的防癌食物,但是事实上坚果类,第4种坚果,巴旦木,又可以叫做扁桃仁。我们食用的基本...
<https://baijiahao.baidu.com/s?...> - 百度快照

第4种坚果,巴旦木,又可以叫做扁桃仁。我们食用的基本都产自国外,国内产量很小。巴旦木营养成分高,种类数量多,维生素,纤维素,蛋白质多种营养。果实不含有胆固醇,可以高效增加身体免疫力,延缓身体衰老,增强肠胃消化促进排便,减少心血管和肠胃癌症的发生,起到防癌和抗癌的功效。



百家号/多多看美食

巴旦木,香脆可口,经常食用对心脏好

Japan

美容や健康に期待できる栄養ぎっしり!
自然生まれのスーパーフードをもっと毎日の食卓に!

健康な美しさを磨き上げるから、今大注目なのがスーパーフード。栄養がギュッと詰まったスーパーフードを、気軽に毎日の食生活に取り入れることのできる、簡単でおいしいレシピを紹介します!

元気になりたい!
 キレイになりたい!

スーパーフードって何?

健康的なスーパーフードとは、天然から育まれたものでなく、自然生まれの食品であることが基本。一般の食品よりも栄養価や健康効果が多く含まれ、またお米や小麦などに比べて多く含まれる植物性「スーパーフード」と呼ばれています。種類の食材として、また健康食品として、毎日の生活に上手に取り入れることで美容と健康への効果が期待できます。代表的なものに、アサイー、カカオ、チアシード、ヘンプシード、ココナッツオイル、アマニ油、大ごま油、アーモンド、クルミなどが挙げられます。

▼毎日食べたい、簡単おいしいスーパーフードレシピ | ▼ロハコで買えるスーパーフード

Recipe 01 Recipe 02 Recipe 03 Recipe 04 Recipe 05

<p>チアシード super food 01</p> <p>シソ科の一年草、チアの種子。浸水さ10倍くらいにジェル状に膨らみ、満腹感が得やすいのが特徴。食物繊維、オメガ3、鉄分、亜鉛など普段の食生活では不足しがちな成分が豊富に含まれています。</p>	<p>に含まれるオメガ3 (α-リノレン酸) は、現代人に不足しがちな栄養素のひとつ。厚生労働省の摂取目標量は、成人1日あたり1.8g~2.4以上。</p>
<p>えごま油 super food 02</p> <p>しそ科のえごまの種子から抽出される油で、体に必要なオメガ3脂肪酸(α-リノレン酸)が約60%含まれている。α-リノレン酸は、体内で脳の働きに大切な栄養素であるDHA、EPAに変わる。</p>	<p>アーモンド super food 05</p> <p>高い抗酸化作用を発揮し、美肌・アンチエイジングに効果が期待されるビタミンE、メタボの予防にも効果的なオレイン酸、その他食物繊維など、10種類以上の栄養素がバランス良く詰まっている。</p>
<p>アサイー super food 03</p> <p>栄養豊富なブラジル原産のヤシ科の植物。抗酸化作用があるといわれるポリフェノールの一種アントシアニンが豊富で、食物繊維、鉄分、ビタミン類やカルシウムなどの健康に欠かせない栄養素も多い。</p>	<p>ココナッツオイル super food 06</p> <p>トランス脂肪酸・コレステロールゼロ。消化吸収が早く体脂肪になりにくく、中鎖脂肪酸が豊富、肝臓で分解されるとケトン体という物質になり、ブドウ糖に代わる脳のエネルギー源となるスーパーフードの代表選手。</p>
<p>ヘンプシード super food 07</p> <p>ヘンプは非常に耐久性のある植物で、多様な地域で生息している。プロテイン、マグネシウムをはじめ、オメガ3、オメガ6の必須脂肪酸をバランスよく含んだ食材で、松の奥のような味わいが楽しめる。</p>	<p>クルミ super food 08</p> <p>たんぱく質と食物繊維が豊富で、ナッツ類の中でもっともオメガ3脂肪酸(DHA、EPA、α-リノレン酸など)が多く、メラトニンやポリフェノールをはじめとする抗酸化物質も含む、注目のスーパーフード。</p>
<p>カカオパウダー super food 09</p> <p>カカオパウダーは、生カカオを非加熱圧縮することによってカカオバターと分離。抗酸化作用のあるポリフェノールやビタミンC、ミネラルなど、女性にうれしい栄養素がいっぱいでリラックス効果も期待できる。</p>	<p>ゴールデンベリー super food 10</p> <p>太陽をいっぱい浴びたアンデスのスーパーフルーツ。プチプチとした食感とあんずやトマトに似た甘酸っぱい味わい。食物繊維、鉄分、マグネシウム、ビタミンA、β-カロテンを豊富に含み、女性の健康食にぴったり。</p>

South Korea

세계 10대 슈퍼푸드
SUPER FOOD

1 귀리 심혈관계 질환 예방 혈당지수 낮아 당뇨병 예방	2 블루베리 시력보호 효과 면역력 증진	3 녹차 위암, 폐암 등 예방 콜레스테롤 흡수 억제	4 마늘 심혈관계 질환 예방 면역력 증진	5 토마토 심혈관계 질환 예방 고혈압 예방
6 브로콜리 암 발생 위험 감소 면역력 증진	7 아몬드 알츠하이머병 예방 지방 흡수 방해	8 적포도주 암 발생 위험 감소 심혈관계 질환 예방	9 시금치 동맥경화, 폐암 예방 감기예방 및 피로회복	10 연어 골다공증 예방 심혈관계 질환 예방

삼성서울병원과 함께 건강한 하루 보내세요

참수: 삼성서울병원 임상영양팀
본 콘텐츠의 저작권은 삼성서울병원에 있으며, 무단으로 사용하거나 복제하여 배포할 경우 법적 책임을 질 수 있습니다.
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2018 MAY
Super Food
매일 먹고 건강해지자

Super Food

블루베리 안토시아닌 : 동맥 혈관에 침전을 생성을 방지, 심장병과 뇌졸중 예방 | 비타민C, 비타민E : 지방의 연소를 돕고, 면역력을 증진, 콜레스테롤 감소로 복부비만에 좋음 | 칼륨 : 체내의 나트륨양 조절

Super Food

비타민
코발린
리유소 :
은 식품.

슈퍼푸드, 지방 많은 식품군 Top3

1위 아몬드	2위 치아씨	3위 호박씨
-----------	-----------	-----------

UK

Nuts and seeds

20 **Almonds**

Help to lower blood fats

A regular handful of almonds will help your body to clear bad cholesterol from your bloodstream more effectively, according to a study in the *Journal of Nutrition* last year. Eat them with the skins on because that's where much of the beneficial fibre is stored.

Boost your health Top 50 foods for brain, heart and joints

Is your diet packed with the most nutrient-dense foods possible? From sage to strawberries, [Peta Bee](#) asks the experts for the best ingredients to eat

Germany

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Health & Wellbeing | Diet & Nutrition

< Back **10 best foods for eye health**

[Daily Dispatch](#) / 19 September 2016

[Facebook](#) [Twitter](#) [LinkedIn](#)

If you want to boost the health of your eyes, these 10 vision-friendly foods should help.

Almonds

The almond is one of the richest sources of vitamin E on the planet, weighs for weight, and a small handful of the nuts will provide half your RDI.

The Age-Related Eye Disease Study (AREDS), a major research project sponsored by the US National Eye Institute found that a regular intake of vitamin E can reduce the risk of developing cataracts by 25%. Other excellent sources of vitamin E include extra-virgin olive oil and sunflower seeds.

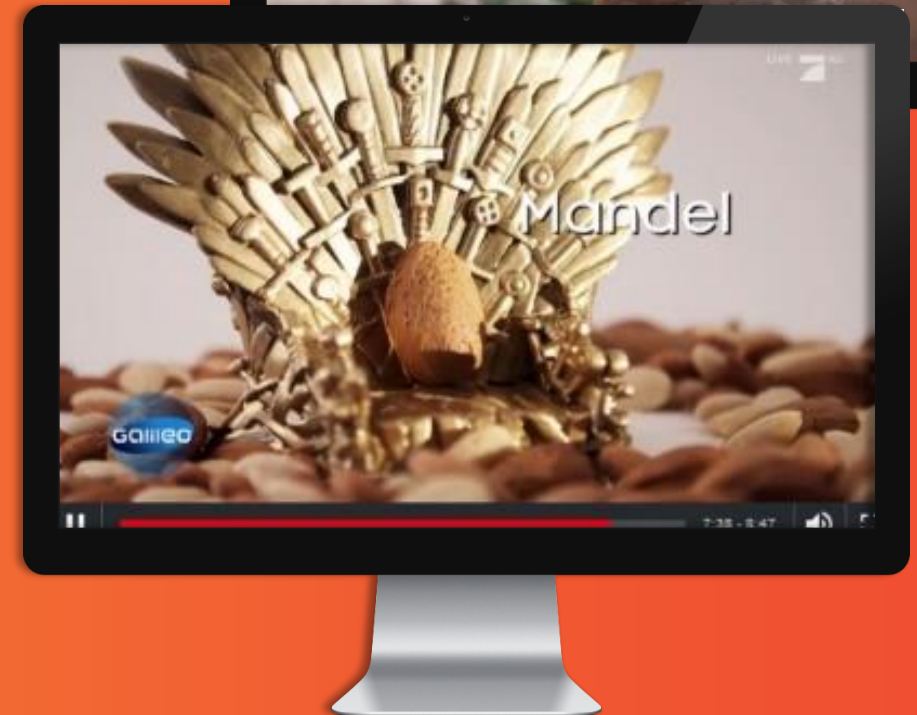
[10 healthy reasons to eat more nuts](#)

Related Topics

- Nutrition
- Sight
- Diet blog
- Weight loss

Age-proof your life

The essential guide





2

Plant Power

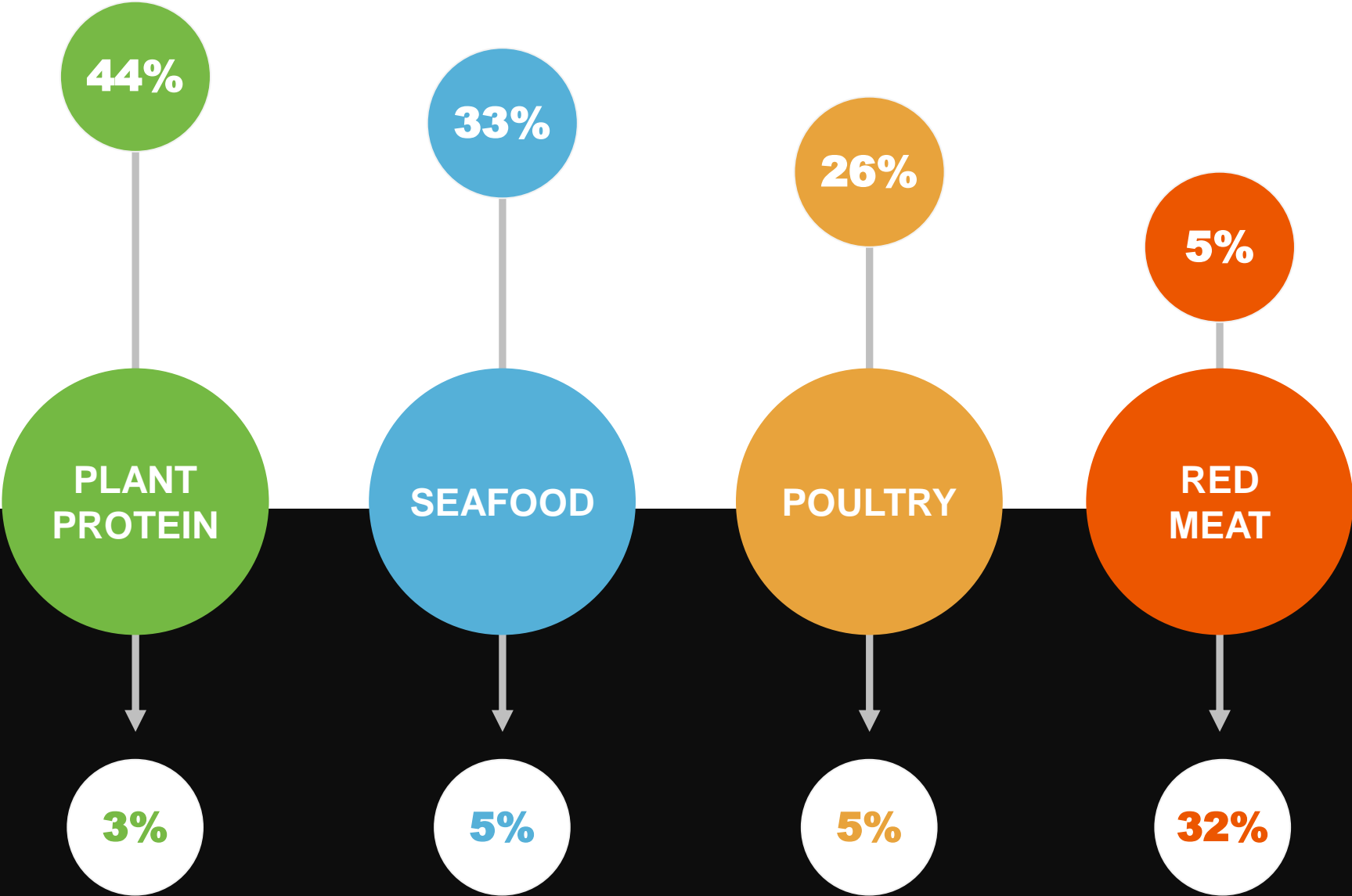


HOW DO I CURRENTLY EAT TODAY?

A top-down view of a black bowl filled with granola. The granola is topped with various fruits including strawberries, blueberries, and pineapple chunks. There are also almonds and other nuts visible. The bowl is placed on a wooden surface. An orange semi-transparent banner is overlaid across the middle of the image, containing the text "HOW DO I WANT TO EAT TOMORROW?".

HOW DO I WANT TO EAT TOMORROW?

WANT TO INCREASE



WANT TO REDUCE

MEATLESS MONDAY'S EXPAND AROUND THE WORLD



AUSTRALIA



BRAZIL



GERMANY



ITALY



BHUTAN



CANADA



U.K.



HONDURAS



JAPAN



BOLIVIA



FRANCE



HONG KONG



S. KOREA



3

The importance of Snacking



The global market size of sweet and savory snacks was worth \$144.0 and it is projected to reach to \$219.6 billion in 2024 with a CAGR of 6.17%

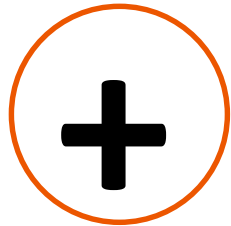
**\$144.0
Billion**

**\$219.6
Billion**

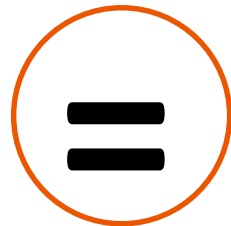
THE “SNACKIFICATION” OF SOCIETY



**Need for
Convenience**

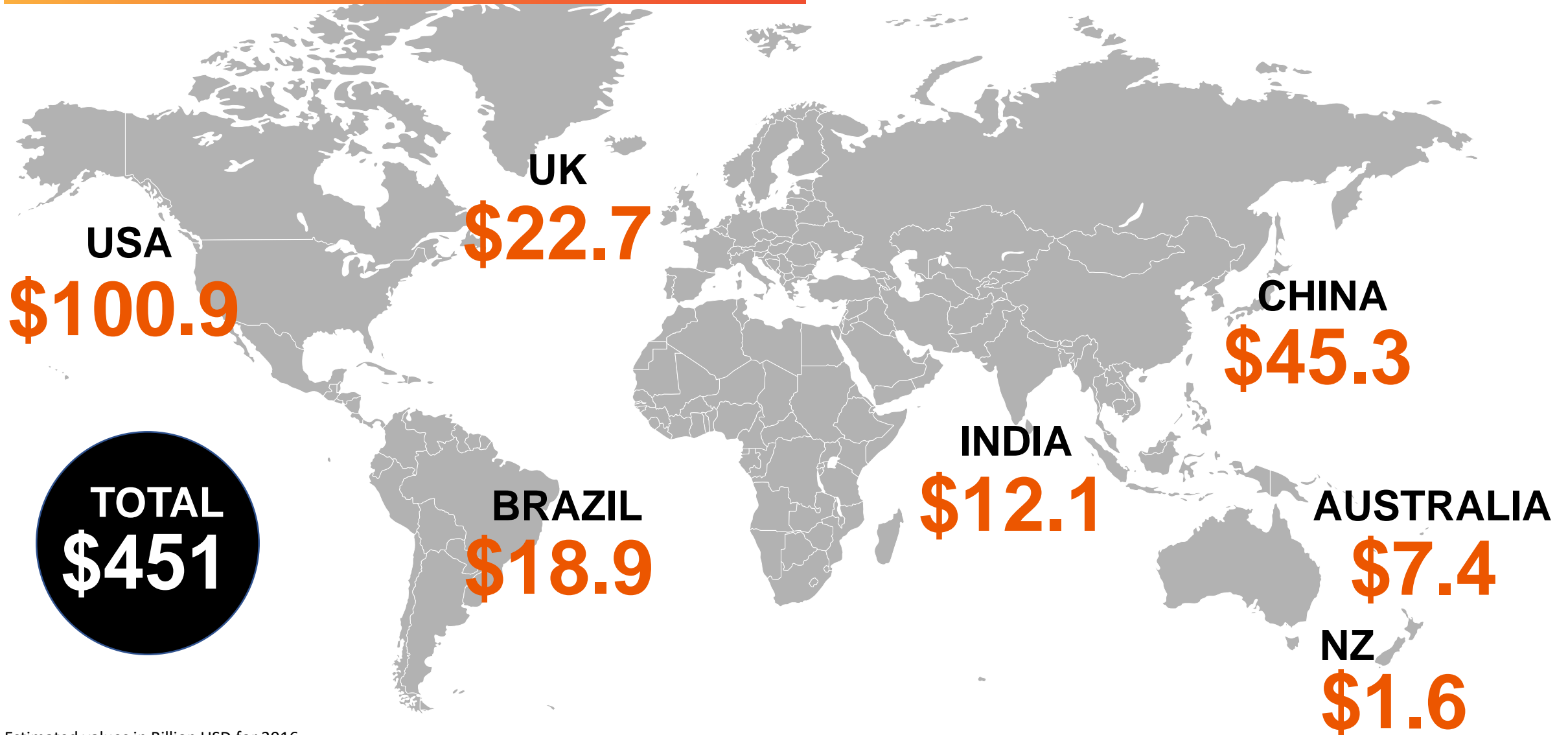


**Shifting
Consumer
Attitudes**



**Proliferation
of Snacking**

SNACKING CONSUMPTION



Estimated values in Billion USD for 2016.

SHIFTING TOWARDS MORE

NATURAL SNACKING OPTIONS⁴

SNACKING

OCCASIONS⁴

63%



Fresh Fruit &
Vegetables

42%



Dairy-Based

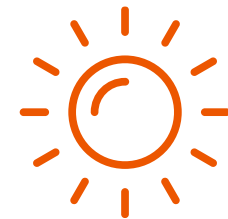
40%



Nuts & Seeds



73%



94%



88%

SNACKING FREQUENCY A DAY⁵



2.5

Kids



3

Young
Adults



2.9

Young
Families



2.4

Established
Families



2.2

Seniors

SNACKING MOTIVATIONS

50%
Treat
myself

37%
Satisfy
hunger

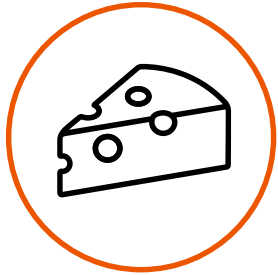
27%
On-the-go

24%
Relieve
stress

26%
Healthier

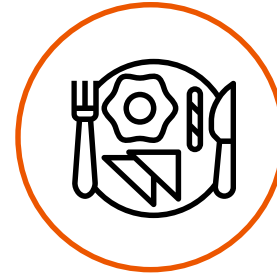
The largest percentage of snackers do so for a **treat**. Health-focused snacks should **aim at enjoyment**.³

OPPORTUNITIES



Out-of-home dairy

Ambient dairy offerings that can be stored at room temperature represents an untapped opportunity.



Snack meal

Snacks as meal replacements are a growing opportunity.¹



Protein Rich Snack

A big opportunity to target the on-the-go consumers looking to satisfy a craving and boost energy levels⁶.



Flexible packing for on-the-go

Pouch packaging, single serves, and re-sealable packaging can increase portability and help reduce waste.⁴

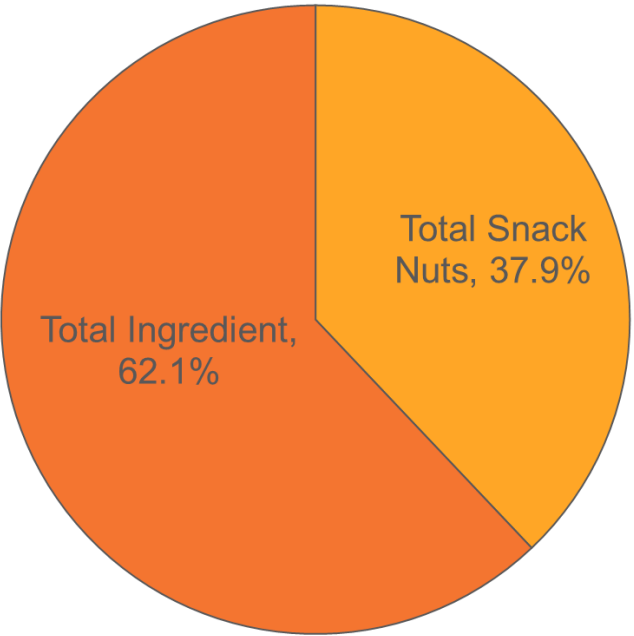
A top-down view of a coffee table. In the center is a platter of brownies, each decorated with five almonds arranged in a flower shape. To the top left is a small bowl of coffee beans. To the bottom left is a white cup of coffee. The background is dark, and the entire scene is framed by a white circular line.

4

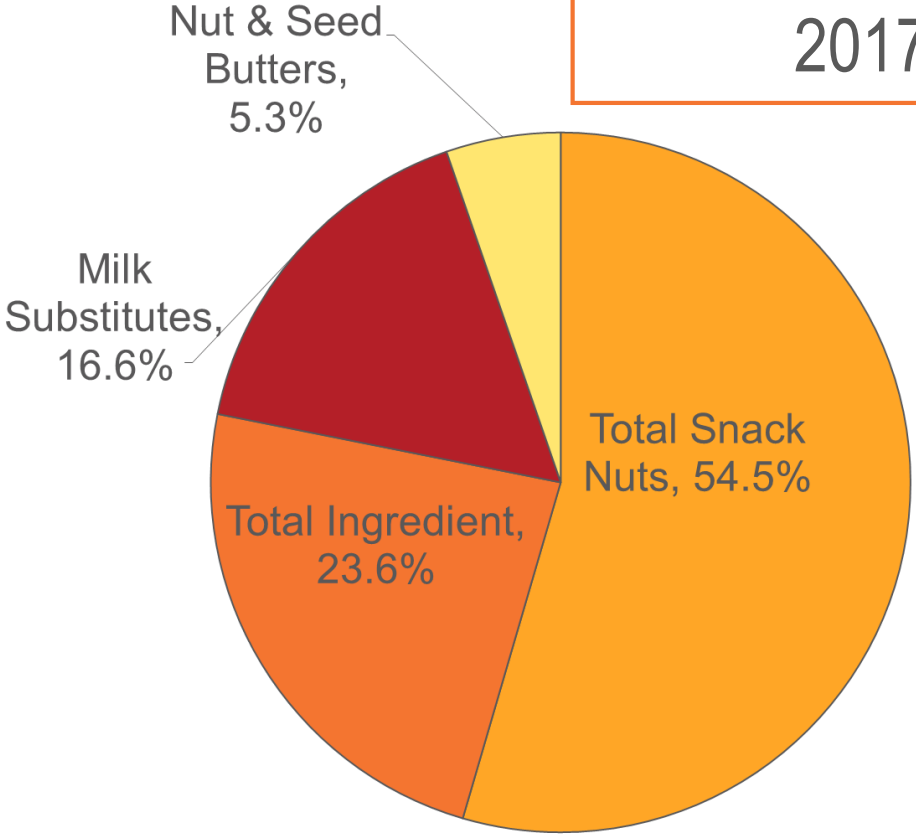
Innovation

PURE ALMOND PRODUCTS NOW DOMINATE SALES

2006



2017



ALMOND PRODUCT OUTPERFORMING CATEGORIES



Almond dairy creams and non-dairy creamer up 111% in sales vs YAGO (while total category is up 6%).

CoffeeMate Natural Bliss Almond Milk Creamer #1 at \$15.5 million in sales



Almond snack and variety packs up 140% in sales vs YAGO (while total category is up 11%)

Nature Valley Granola Cups - brand new \$10 million dollar product in 2 years



Almond produce meal combos up 40% in sales vs. YAGO (while total category is up 35.7%)

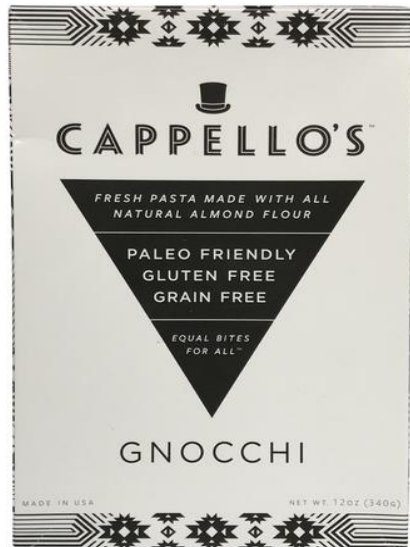
Sargento Balanced Breaks represent \$30 million this year, up 20% vs. YAGO



Dairy yogurts with almonds up 17.4% in sales vs YAGO (while total category is down 3%).

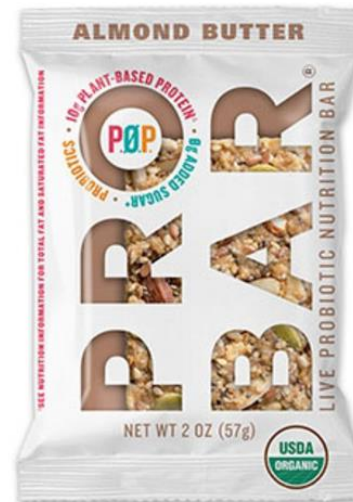
Chobani almond flips at \$90 million + in sales

ALMOND BASED GLUTEN-FREE APPLICATIONS IN NEW CATEGORIES



Cappellos Gnocchi

United States, Nov 2017



Probar Live Probiotic Nutrition Bar With Almond Butter Flavor

United States, Sep 2017



Fattoria Della Mandorla Mandorella E Lenticchie: Almond And Lentils Burger

Italy, May 2017

APPLICATION OF ALMONDS IN FORMULATION OF CLEAN LABEL SPREADS



Kung Markatta Almond Butter

Sweden, Dec 2017



Morlife Spinach, Herb and Onion Superdip Mix

Australia, May 2017



Simply Raw Organic Almond And Cacao Raw Crème

Germany, Jul 2017

APPLICATION OF ALMOND INGREDIENTS IN FORMULATION OF CLEAN LABEL SNACKS



ALMOND

Gimme Organic Seaweed Thins Sriracha Almond Savory And Sweet Crispy Wafers

United States, Dec 2017



ALMOND BUTTER

Mission More 6 Snack Balls With Blueberries And Baobab

Germany, Jun 2017



ALMOND FLOUR

Barnana Organic Crunchy Toasted Coconut Banana Brittle

United States, Aug 2017

APPLICATION OF ALMOND INGREDIENTS IN FORMULATION OF CLEAN LABEL SNACKS



ALMOND

**Muller Bio Primo Organic Fruit Bar
With Honey-Almond-Ginger**

Germany, Dec 2017



ALMOND BUTTER AND PIECES

**Perfect Bar The Original Refrigerated Protein Bar
With Dark Chocolate Almond**

United States, Nov 2017



ALMOND BUTTER & FLOUR

Paleo Treats Mustang Bar

United Kingdom, Mar 2016

VERSATILE APPLICATIONS OF ALMONDS IN DAIRY ALTERNATIVE PRODUCTS



NON-DAIRY YOGURT

**Silk Almond Milk Yogurt
Alternative: Vanilla**

United States, Sep 2017



NON DAIRY MILK

Alpro Oat Almond Drink

Belgium, Dec 2017



CHEESE SOFT/SEMI-SOFT

Cicioni Fermented Nut Cheese

Italy, Jan 2017

ALMOND OIL SHOWS PROMISE IN FOODS & BEAUTY





5

Global Market Development

MARKETING APPROACH

- 1. Invest and develop foundational platforms for industry long-term growth**
- 2. Disciplined, data-driven strategic approach to market development**
- 3. Highly creative, targeted, best-in-class marketing programs**

OUR DISCIPLINED APPROACH

Global Demand Analysis



Markets projections and prioritization

Opportunity Assessment



Focus within markets

Target Segmentation



Target identification and sizing

Message Deep Dives



Target refinement and messages

GLOBAL MARKETING OVERVIEW

NORTH AMERICA

Canada
U.S.
Mexico



EUROPE

UK, France,
Germany,
Italy

EXPLORATORY MARKETS

Brazil, Chile, Argentina

ASIA

China, India,
S. Korea, Japan



FOCUSING ON CORE BENEFITS

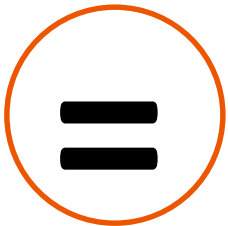
- 1. Skin and Beauty in Asia**
- 2. Mental acuity in India**
- 3. Lifestyle in the West**



Health Perceptions



Almond Snacking Usage



Almond Value Quotient

(Average of Combined Health and Snacking scores)



Measuring Perception changes and Program Effectiveness:

- Attitudes, Awareness and Usage Studies
- Advertising testing and evaluation
- Consumer Qualitative and Ethnographic deep dives

MEASURING

SUCCESS





EVALUATION OF ALMOND SHIPMENTS AND CONSUMER SALES

Shipments

- ABC Position Report
- Global Trade Atlas
- Sales data

Sales data

- Changes vs. prior year

Trended over time

- 5 and 10 years
- Percent shipments
- Shipments vs. spending

Thank you!



What's Next

Tuesday, December 4 at 1:45 p.m.

- Managing Nutrients and Salt Under Current Water Quality Regulations – Room 308-309
- What's Happening in DC? - 312-313
- The Almond Aflatoxin Menace: Addressing It Head On – Room 306-307
- Sustainability: Aligning with Food Manufacturers' Needs for the Future – Room 314



**Join the social media
conversation at
[#AlmondConf](#)**

What's Next

Tuesday, December 4

- State of the Industry – Hall C at 4:15 p.m.

Be sure to join us at 5:30 p.m. in Hall A+B for Dedicated Trade Show Time and Opening Reception, sponsored by FMC Agricultural Solutions

FMC