



2018 | THE ALMOND CONFERENCE

“OWN YOUR EVERYDAY” AND “PONTE ALMENDRA”: NEW
CONSUMER CAMPAIGNS AND PROGRESS IN NORTH
AMERICA

ROOM 314 | DECEMBER 6, 2018





2018 | THE ALMOND CONFERENCE

NEW CONSUMER CAMPAIGNS AND PROGRESS IN NORTH AMERICA

EMILY FLEISCHMANN, *Sr Director, Global Marketing, Almond Board of California*

BRIAN O'CONNELL, *Associate Director Strategic Planning, Sterling-Rice Group*

BECKY JEFFERS, *Marketing Manager, Almond Board of California*





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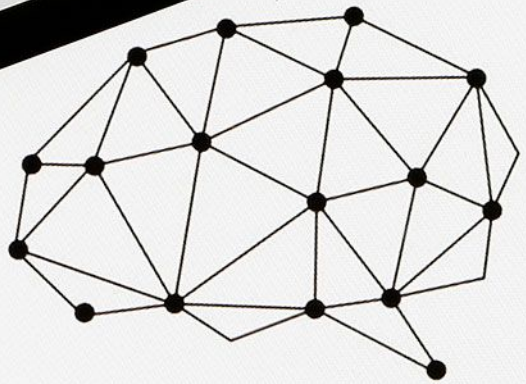
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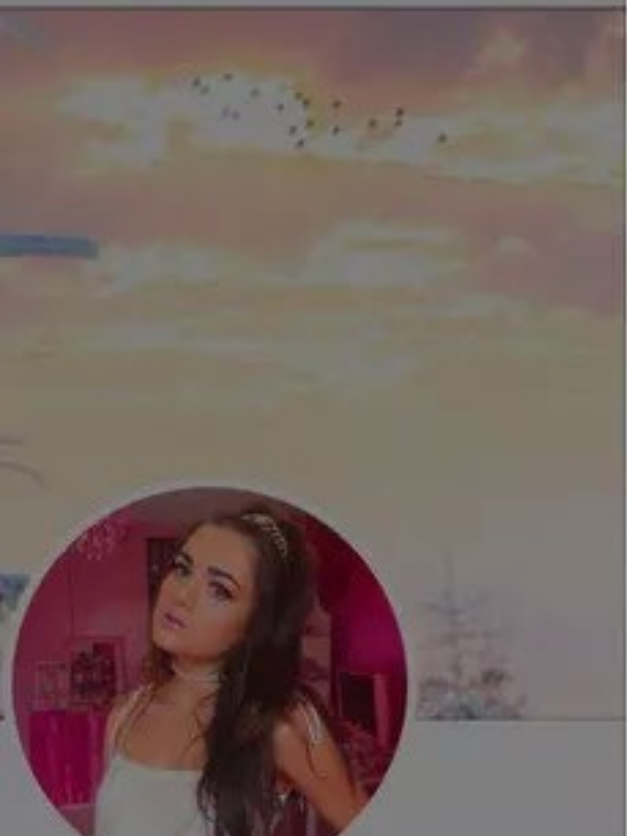
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Cloe Feldman ✓

@CloeCouture

princess CLO 🧚 living my own fairytale ✨
snapchat: realcloecouture

business@cloecouture.com

youtube.com/cloecouture

Joined April 2011



Cloe Feldman ✓

@CloeCouture

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What do you hear?! Yanny or Laurel

What do you hear?!?

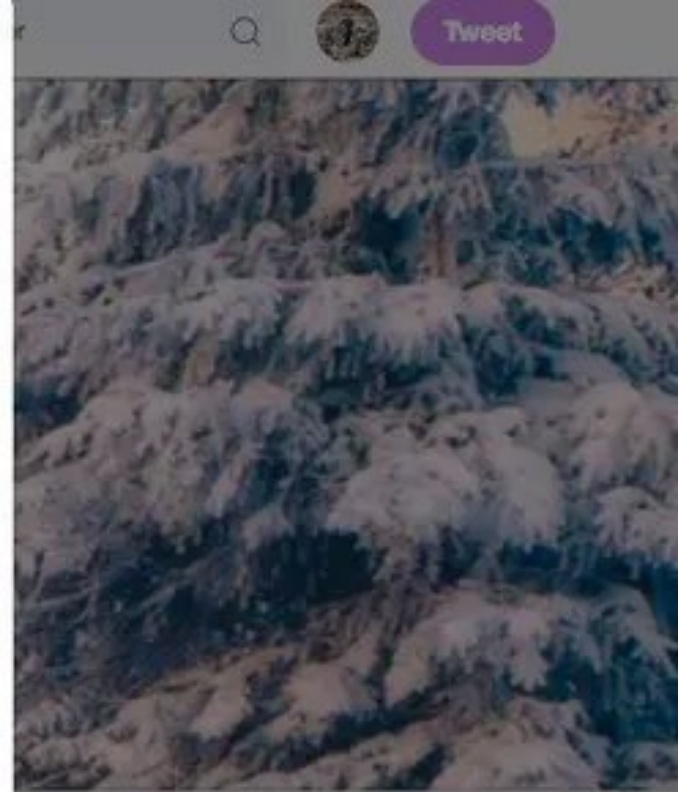
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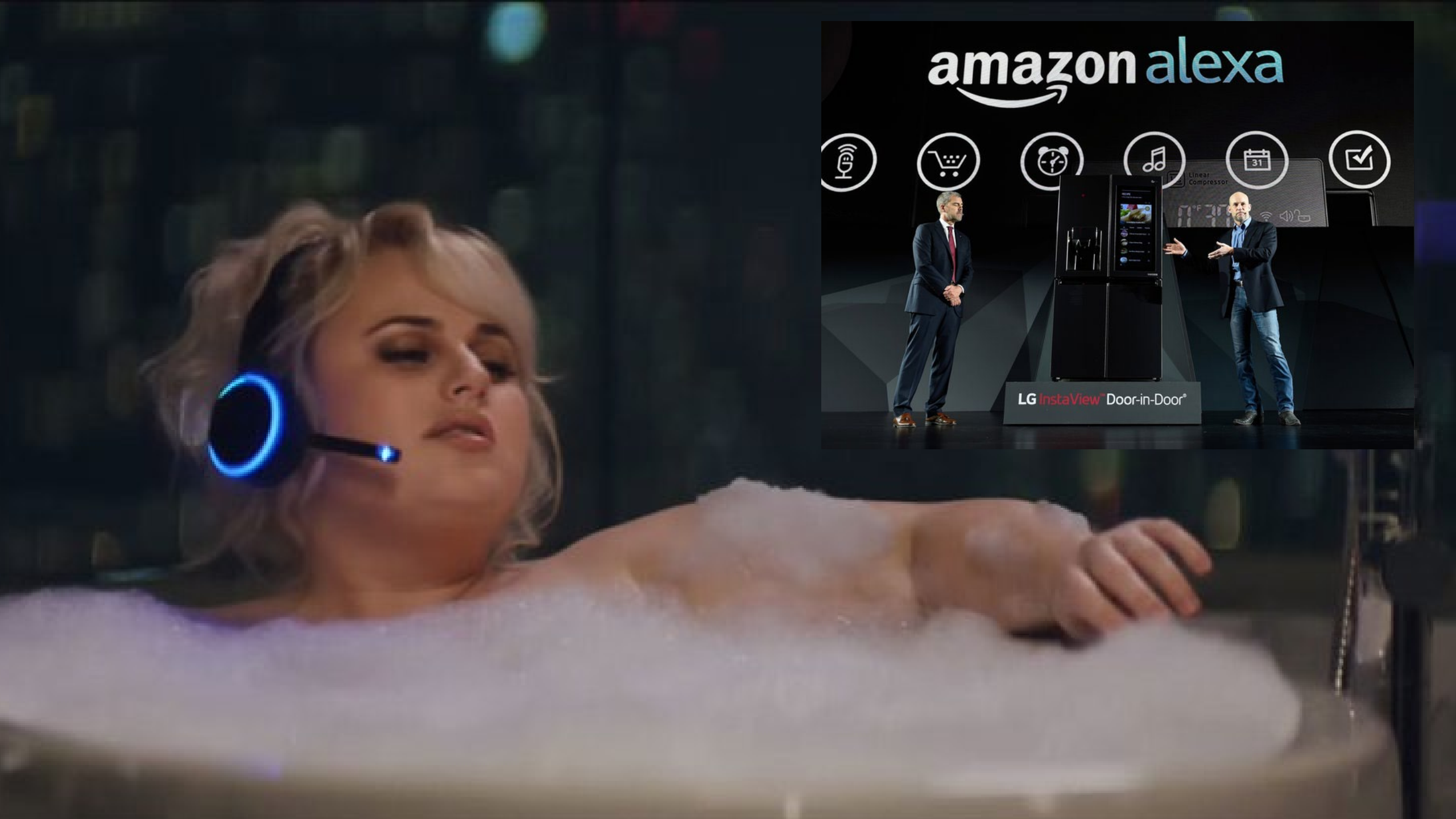
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Good & Beautiful
BAKED MULTIGRAIN

Wheetos

Lay's

OvenBak

Sour Cream & Onion

Pringles

Mission's
OLD FASHIONED
FRESH BAKED
PORK SKIN
WITH REAL FLAVOR
IMPROVED

NET WT
1.5 OZ (42g)

Reese's
MILK CHOCOLATE
2 PEANUT BUTTER CUPS

PER PACK
210
CALORIES

13g
TOTAL FAT

4.5g
SAT FAT

150mg
SODIUM

21g
SUGARS

210
CALORIES

SNYDER'S
OF HANOVER

100% Natural

Pringles
Original

FRID

Cheddar

Taste
Garden of Eatin'

NEW! FULL
FLAVORED

NET WT. 1.5 OZ



2018

THE ALMOND CONFERENCE

NEW CONSUMER CAMPAIGNS AND PROGRESS IN NORTH AMERICA

BRIAN O'CONNELL, *Associate Director Strategic Planning, Sterling-Rice Group*



A young woman with a wide smile is shown from the chest up, holding several bags of candy. She is wearing a light blue denim jacket over a yellow top. The background is a brightly lit candy store with shelves full of various candies. An orange semi-transparent banner is overlaid across the middle of the image, containing the text 'STATE OF SNACKING: NORTH AMERICA' in white, bold, uppercase letters. Below the text is a small white horizontal line.

STATE OF SNACKING: NORTH AMERICA



**FOR MANY,
SNACKING
CAN BE A
SECURITY
BLANKET**

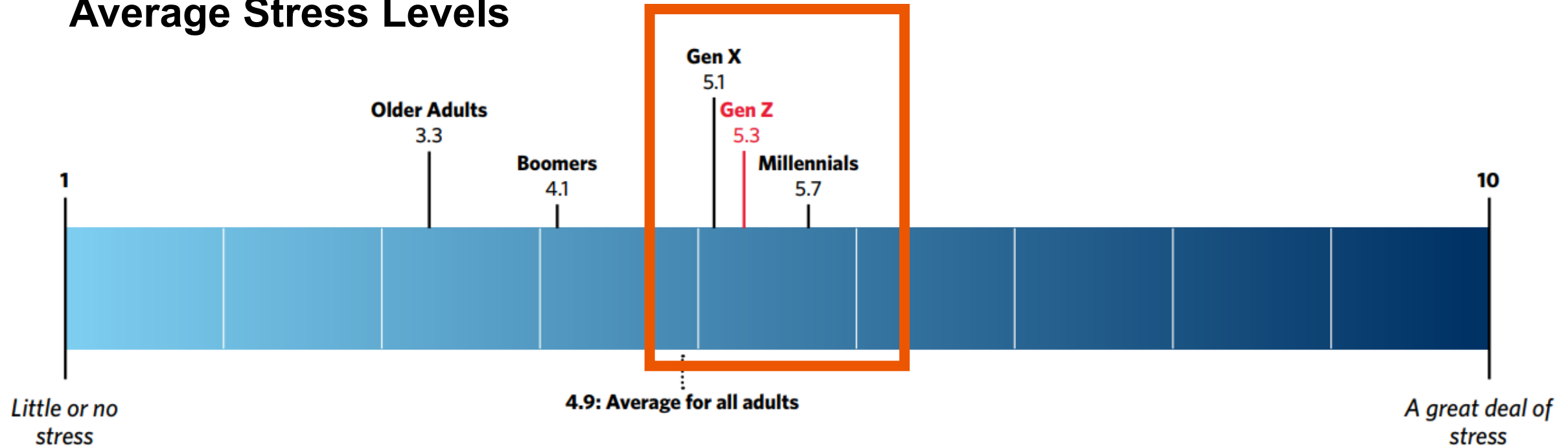


**“ON THE GO”
LIFESTYLES OF GEN Y + Z
ARE CHANGING EATING
HABITS AND ATTITUDES.**



AS PART OF THAT, ONE MAJOR FORCE SHAPING SNACKING HABITS ARE THE STRESS LEVELS OF YOUNGER GENERATIONS.

Average Stress Levels



STRESS SHAPES WHAT WE CRAVE

Craving: the mind
and body's attempt
to pull us back
together.





“I just wish there were more hours in the day. I have so many things I want to do, but you just run out of time.”

**50% OF BUSY
BALANCERS AGREE
WITH THE STATEMENT:**

**“MY HECTIC LIFESTYLE
REQUIRES THAT I
SNACK A LOT.”**

--U.S. ABC SEGEMENTATION STUDY 2017



SNACKING HELPS GIVE THEM A PHYSICAL ENERGY BOOST, FUEL THEM WHEN THEY DON'T HAVE TIME TO COOK, SUSTAIN THEIR ENERGY, AND GIVES THEM A REWARD OR TREAT.

--U.S. ABC SEGEMENTATION STUDY 2017

THE ALMOND OPPORTUNITY:

HELP “ON-THE-GO”
SNACKERS
“RE-ESTABLISH
THEIR CENTER”
WITH ALMONDS.





STATE OF SNACKING: NORTH AMERICA

FOR MANY, SNACKING CAN BE
A SECURITY BLANKET

**SNACKING IS TRENDIER AND MORE
PROLIFIC THAN EVER**





**SNACKING
IS TRENDIER
AND MORE
PROLIFIC
THAN EVER**



**Need for
Convenience**



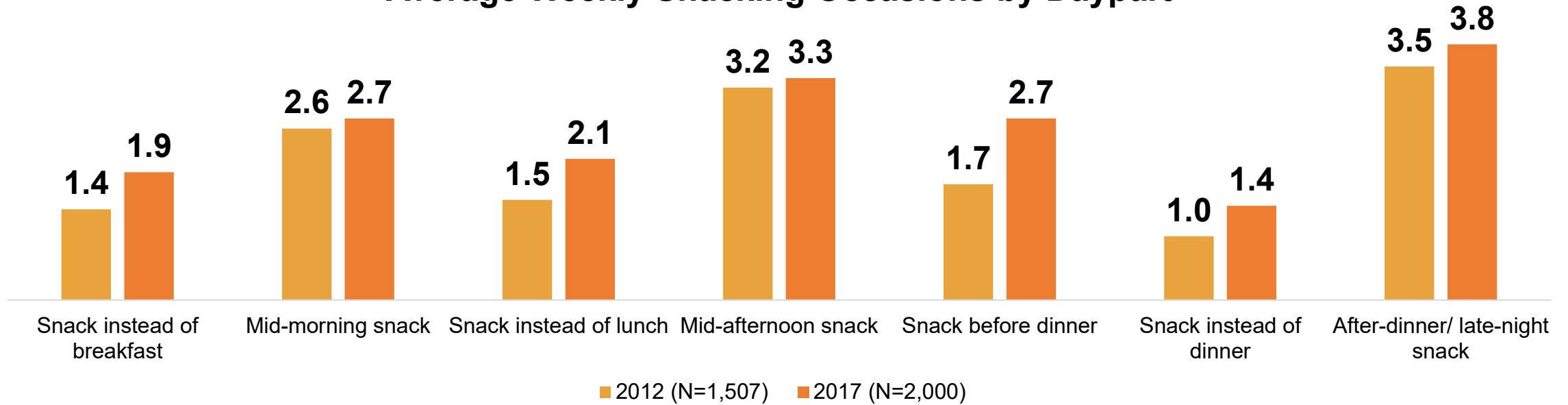
**Shifting
Consumer
Attitudes**



**Proliferation
of Snacking**

PEOPLE ARE SNACKING NOW MORE THAN EVER.

Average Weekly Snacking Occasions by Daypart



	2012	2017
Total Weekly Snacks	14.7	17.9
Average Daily Snacks	2.1	2.6

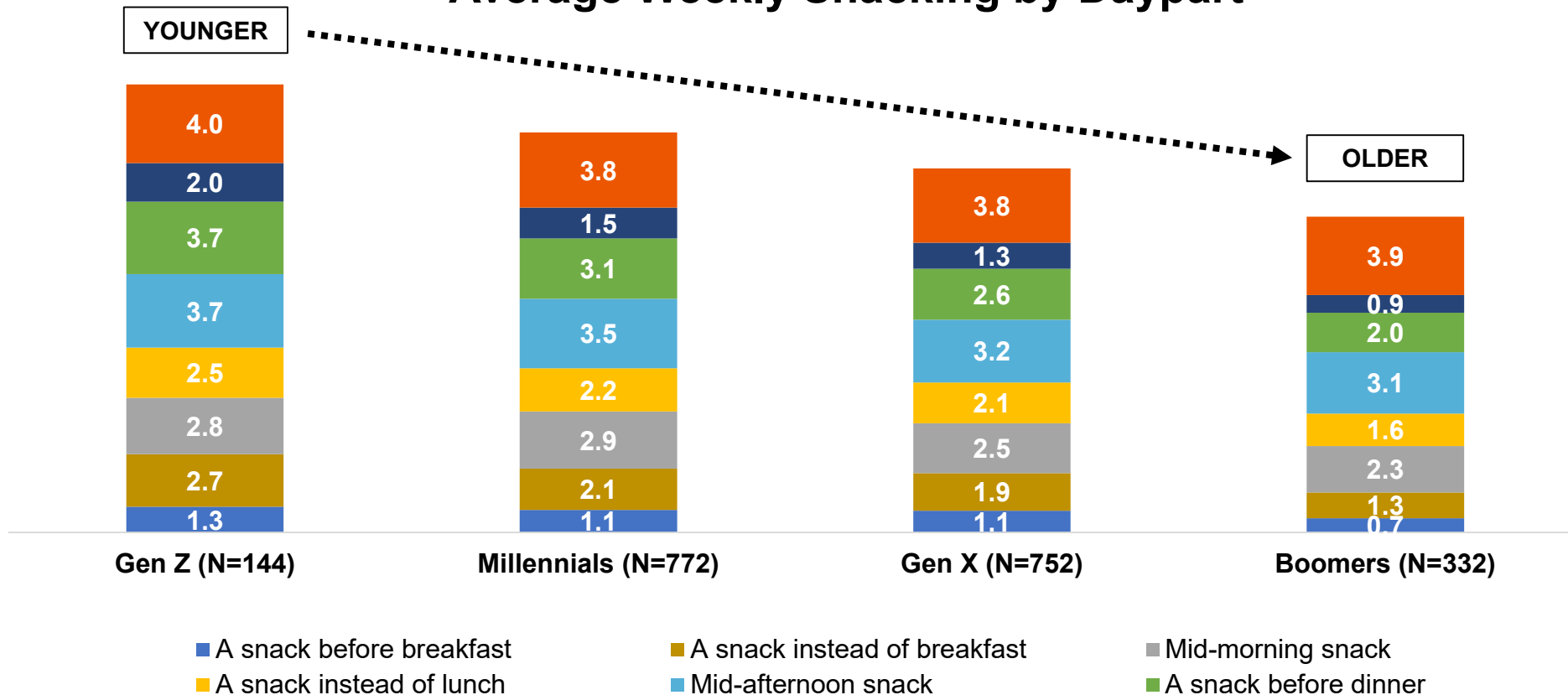
94% OF US ADULTS SNACK ON A DAILY BASIS

*Snack before breakfast occasion not asked in 2012

Source: Mintel, "SNACKING MOTIVATIONS AND ATTITUDES, US – MAY 2017"

AS EXPECTED, YOUNGER PEOPLE ARE SNACKING MORE THAN THEIR OLDER COUNTER-PARTS.

Average Weekly Snacking by Daypart



Young adults are most likely to have increased snacking and young snackers are most likely to claim they're too busy for a full meal

Source: Mintel, "SNACKING MOTIVATIONS AND ATTITUDES, US - MAY 2017"

*Snack before breakfast occasion not asked in 2012



**AS A RESULT,
WE'VE SEEN A
“SNACKIFICATION”
OF SOCIETY.**



50%
**OF ALL EATING
OCCASIONS
ARE NOW SNACKS!**

The Hartman Group,
The Future of Snacking



COMBINED SALES OF BISCUITS, SNACK
BARS, SAVORY SNACKS, CONFECTIONARY,
ICE CREAM, BAKERY SNACKS
(CAKES AND PASTRIES) AND YOGURT
**INCREASED BY A CAGR OF 3%
BETWEEN 2011 AND 2016.**

INVESTMENT IN E-COM IS DRIVING CATEGORY GROWTH/PROLIFERATION EVEN FURTHER.

- **Internet retailing gained value share across sweet biscuits, fruit snacks and bars in 2016. Snack bars enjoyed the highest online penetration rate and reached a value share of 7%.**
 - Players like Kind and Quest Nutrition highly invested in online sales thorough Amazon and direct-to-consumer programs.
 - Mondelez is also betting big on e-commerce, announcing plans in 2015 to increase online sales to USD1 billion by 2020.



THE ALMOND OPPORTUNITY:

USE ALMONDS
VERSATILITY TO
MAKE IT A UBIQUITOUS
SNACK WITHIN
“THE SNACKIFICATION
OF SOCIETY.”



A woman's face is visible in the background, slightly out of focus, against a warm orange and red gradient. The text is overlaid on this background.

STATE OF SNACKING: NORTH AMERICA

FOR MANY, SNACKING CAN BE
A SECURITY BLANKET

SNACKING IS TRENDIER AND MORE
PROLIFIC THAN EVER

IT'S ALL ABOUT WHAT'S IN SNACKS,
NOT WHAT'S NOT IN THEM





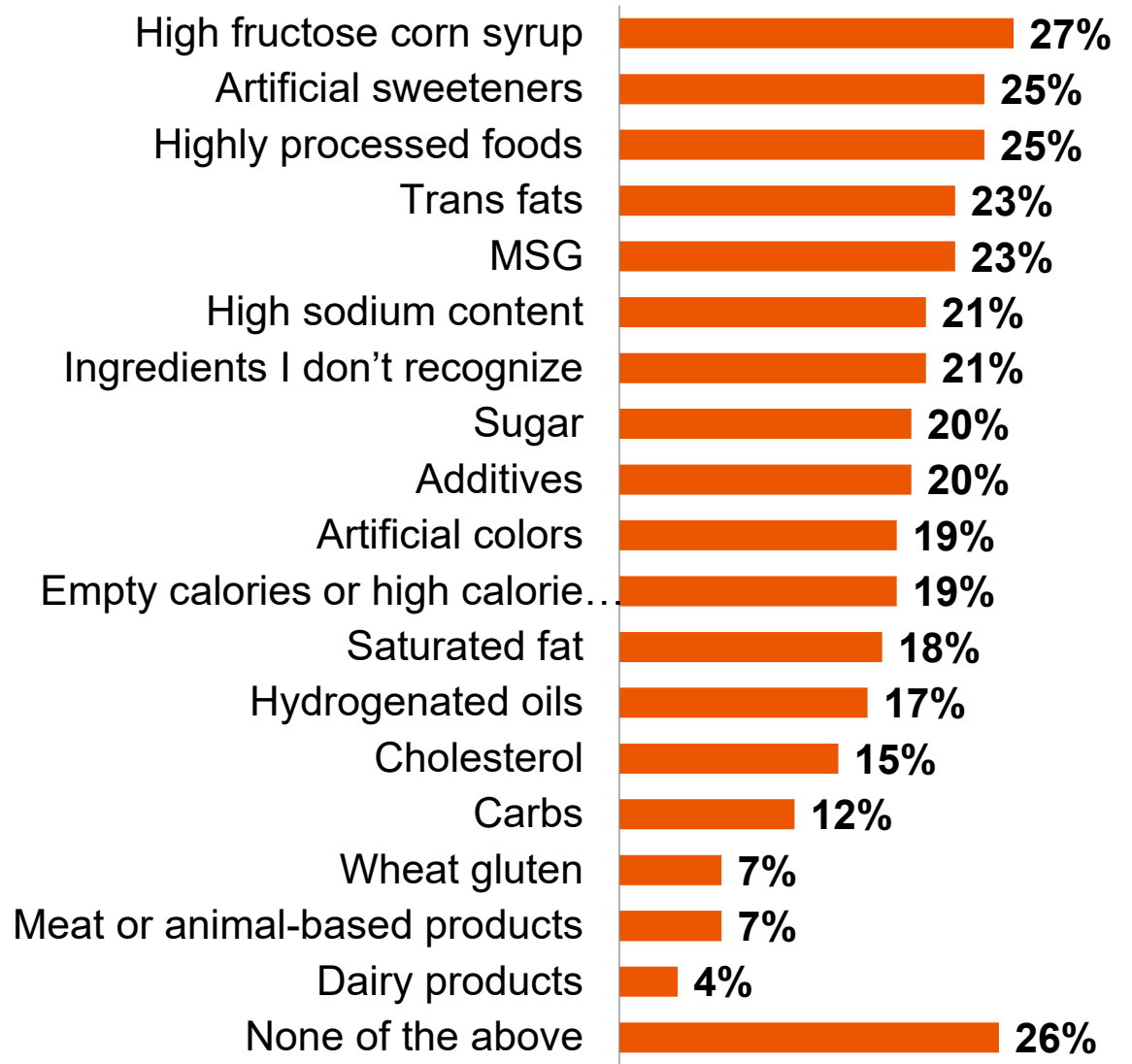
**IT'S ALL ABOUT
WHAT'S IN
SNACKS,
NOT WHAT'S
NOT IN THEM**



**Lets start here,
consumers report
avoiding snacks with
harmful ingredients,
or ingredients they
do not recognize.**

**Sweeteners, sugar, trans fats,
and additives are among the most
avoided ingredients in snacks.**

Attributes Avoided (N=2,000)



*Snack before breakfast occasion not asked in 2012

CONSUMER PRESSURE IS CHANGING THE SNACKING LANDSCAPE.

- We are seeing a continued shift away from mass-produced products with long ingredient lists in favor of products appearing to be more natural.
- U.S. cities begin passing taxes on sweetened soft drinks, which significantly reduced consumption
- The FDA will launch new mandates on labels in July 2018, with a specific emphasis on labeling added sugars.

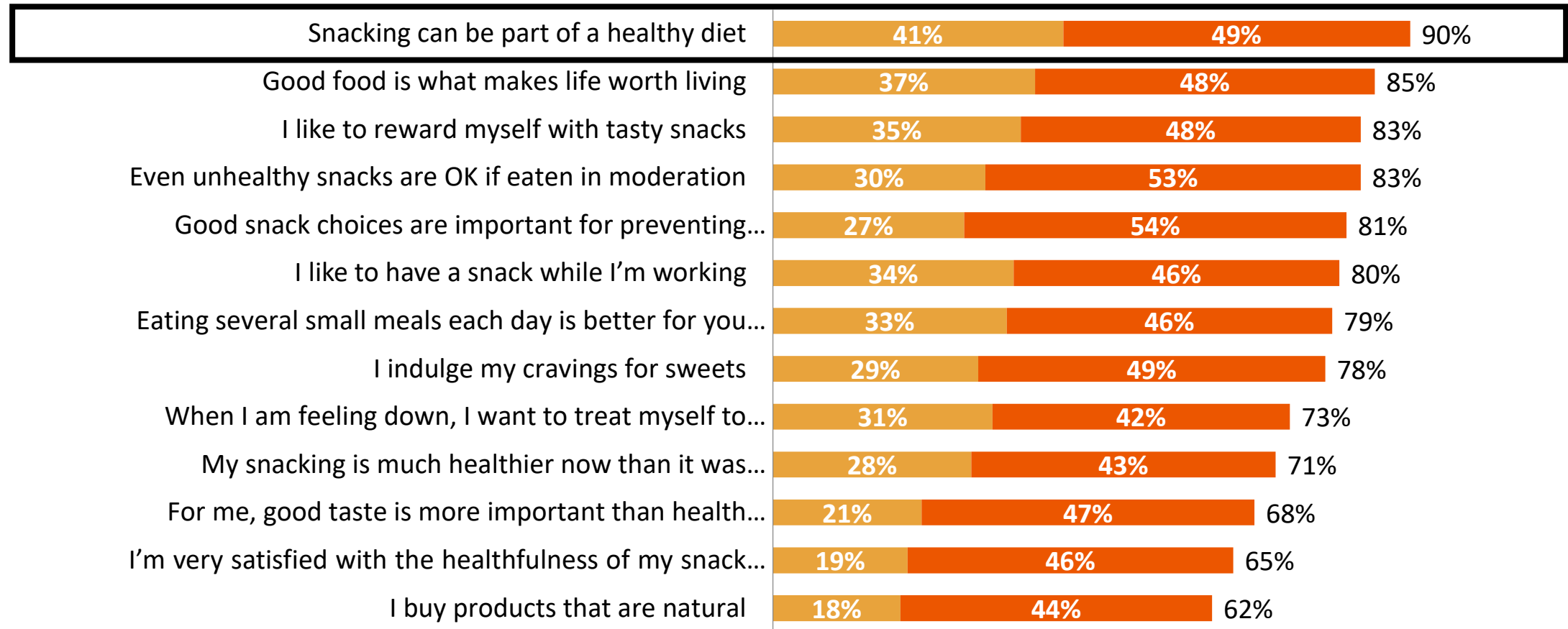
AND THEY ARE
LOOKING MORE
CLOSELY AT
THE PRESENCE
OF POSITIVES.



*Snack before breakfast occasion not asked in 2012

THERE'S GOOD NEWS FOR SNACKS. 90% OF SNACKERS FEEL THAT SNACKING IS PART OF A HEALTHY DIET.

Snacking Attitudes- High Agreement (N=2,000)



*Snack before breakfast occasion not asked in 2012

Strongly Agree



**THE ALMOND
OPPORTUNITY:
SHOW CONSUMERS
THAT ALMONDS
ARE THE “ONLY THE
GOOD STUFF” SNACK.**



2018

THE ALMOND CONFERENCE

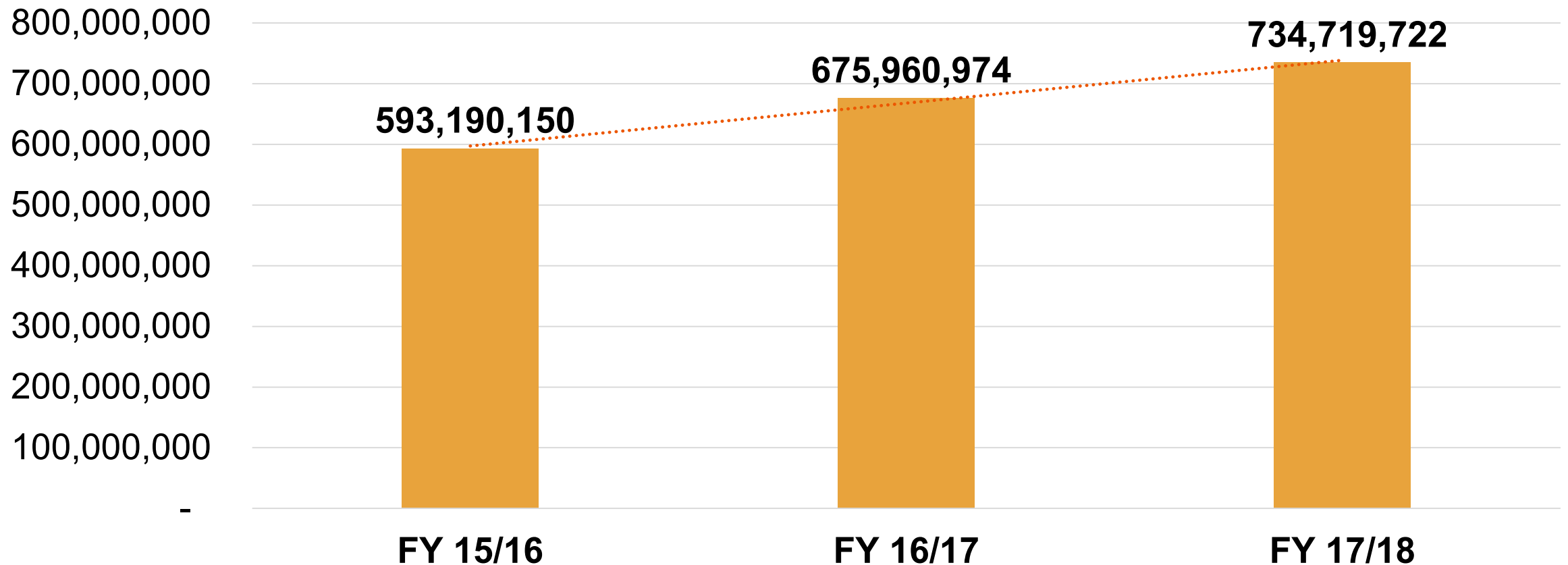
NEW CONSUMER CAMPAIGNS AND PROGRESS IN NORTH AMERICA

BECKY JEFFERS, *Marketing Manager, Almond Board of California*



U.S. SHIPMENT GROWTH

U.S. Shipments (Pounds)





MAXIMIZE OUR APPROACH:

How can we grow consumption even more in this market? What user group should we prioritize to efficiently and effectively increase consumption?

SOLUTION:

Find new target audience that can be inspired to increase their purchases and grow their almond affinity.

DRIVING VOLUME

To ensure demand keeps up with an increase in supply we shifted our focus on increasing almond consumption among medium users.

- About how often do you eat almonds (either by themselves or in other foods)?



Non-Users	Light Users	Medium Users	Heavy Users	Super Heavy Users
N=330	N=870	N=1140	N=450	N=210
11%	29%	38%	15%	7%
"I never eat almonds"	Eat Almonds Several Times Per Year or Less	Eat Almonds Once a Month to Once a Week	Eat Almonds Several Times per Week	Eat Almonds Everyday

U.S. TARGET AUDIENCE: BUSY BALANCERS



Purchase Power

Household income \$75K+
(median HHI \$70.8K)



Connected

Spends time on social, streams radio, shops online, stays informed of key topics online and plans travel.



Savvy Shoppers

Looks to find deals without sacrificing quality.



32% of U.S.
77 Million
Adults

44% males

56% females

Tries To Do It All

Is strapped for time because of pursuing so many interests. Enjoys spending time with family and friends, working out and staying involved with the community



Image Conscious

Aware of others' perceptions of them and tries to maintain a favorable and influential image among peers.

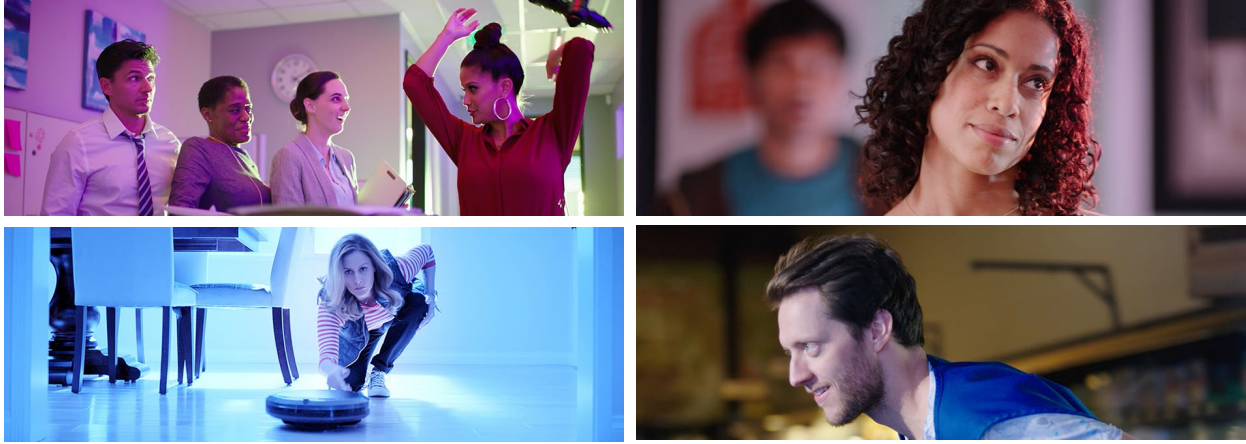


Food for Fuel

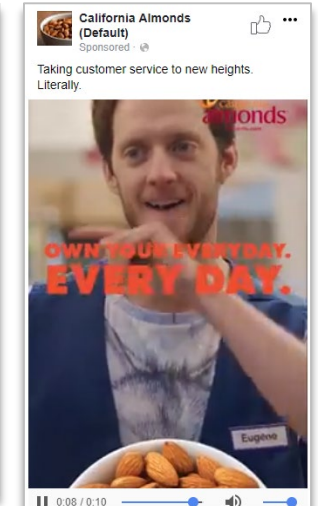
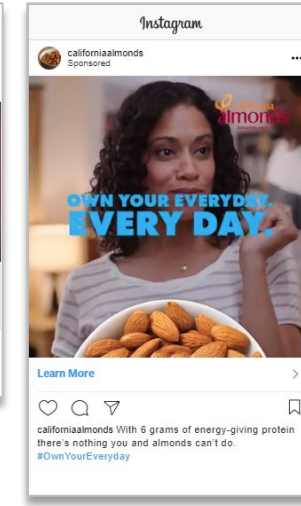
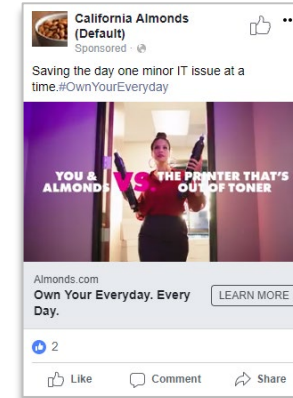
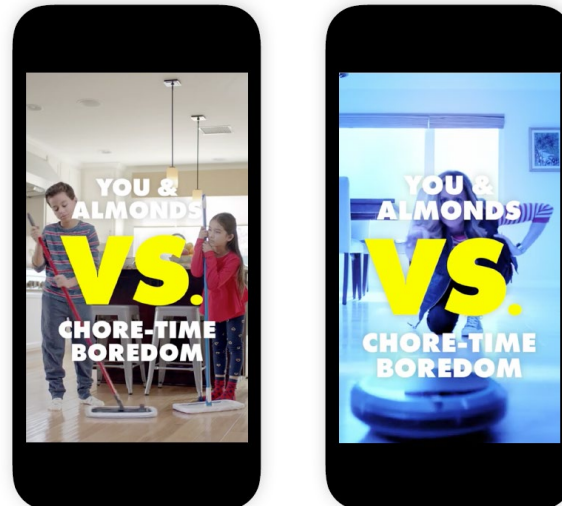
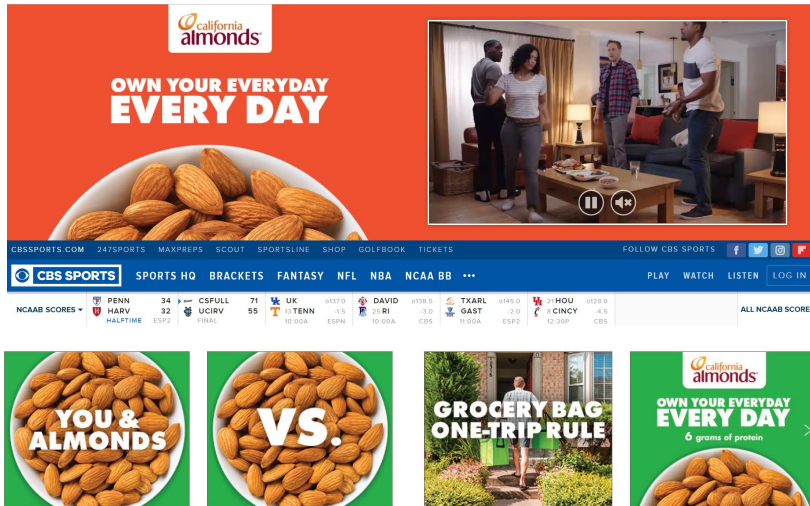
Likes to try new and exciting foods, but values convenience to keep up with busy life.



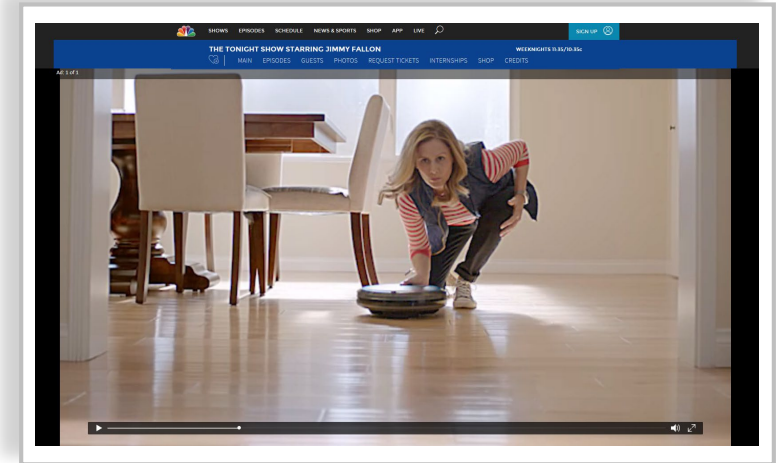
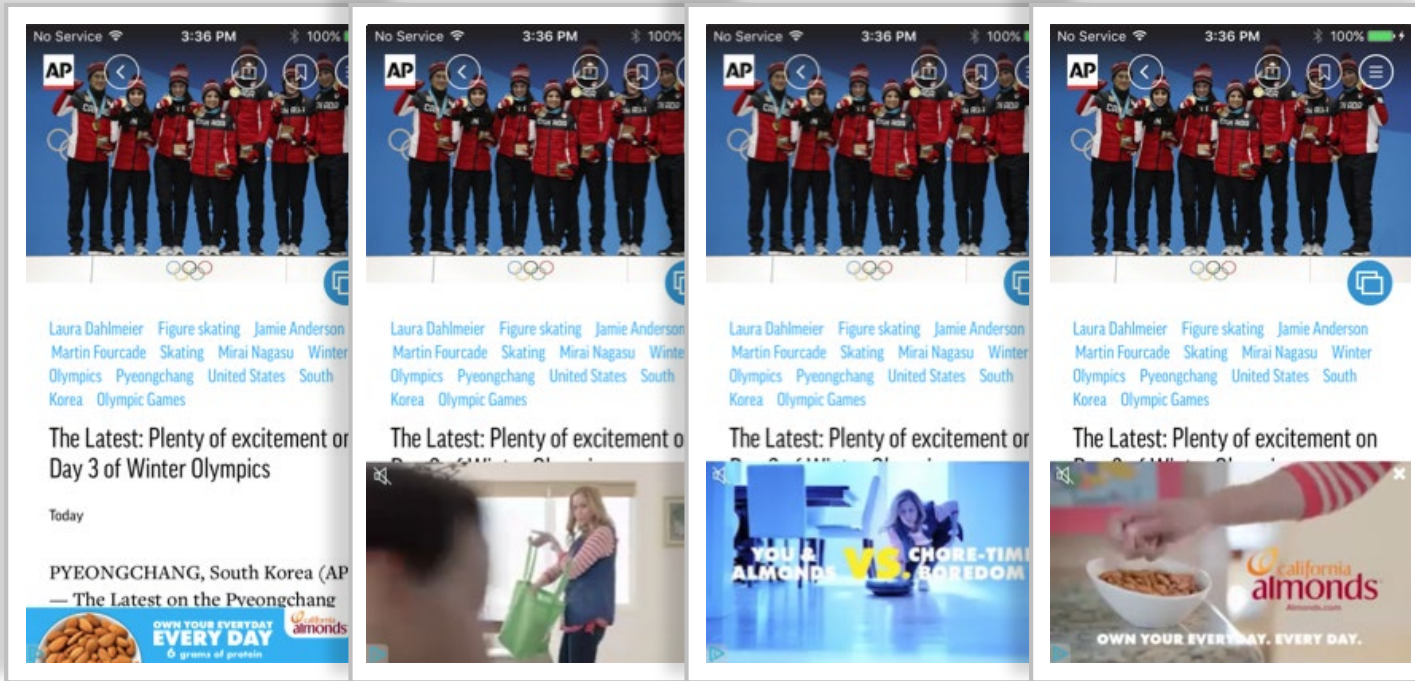
U.S. OWN YOUR EVERYDAY, EVERY DAY CREATIVE



<https://www.youtube.com/watch?v=l7m00Y7ZzUQ&index=63&list=PLC1A5A2AB3FFF770B>

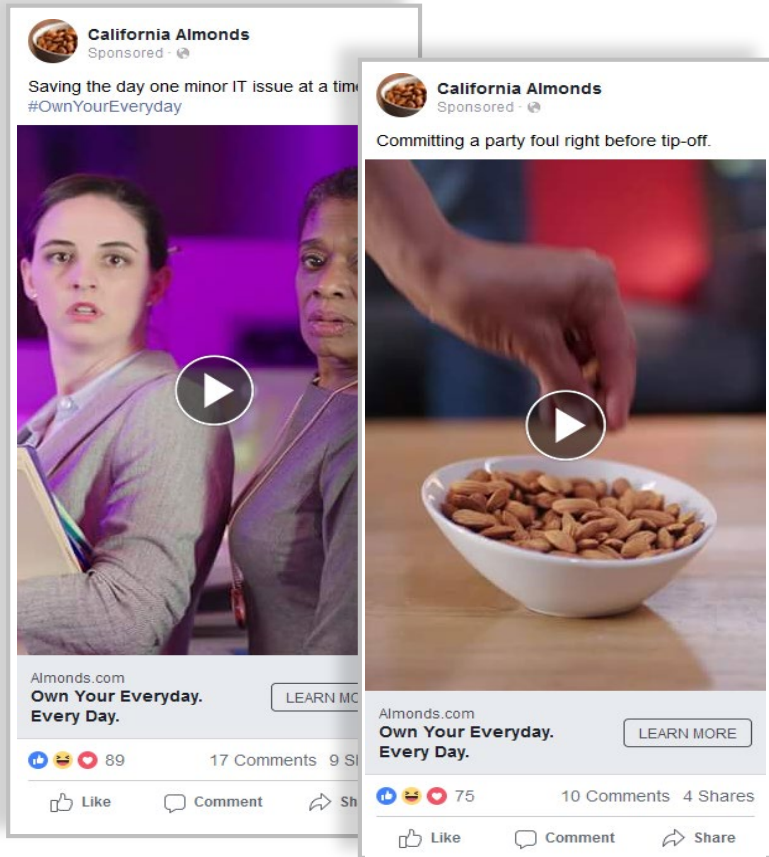


STARTED OFF WITH WINTER OLYMPICS 2018

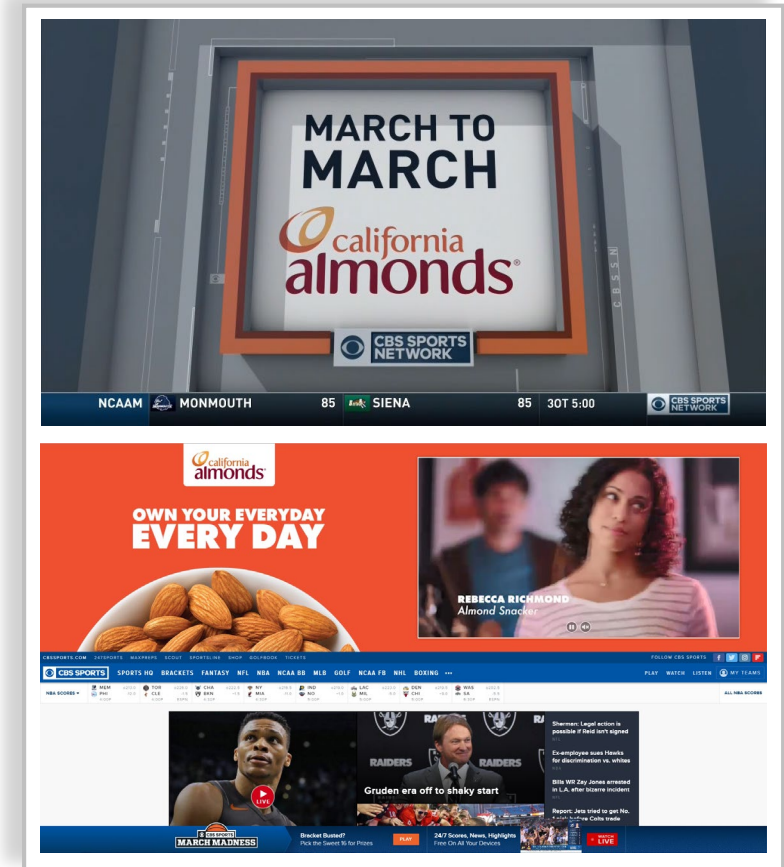
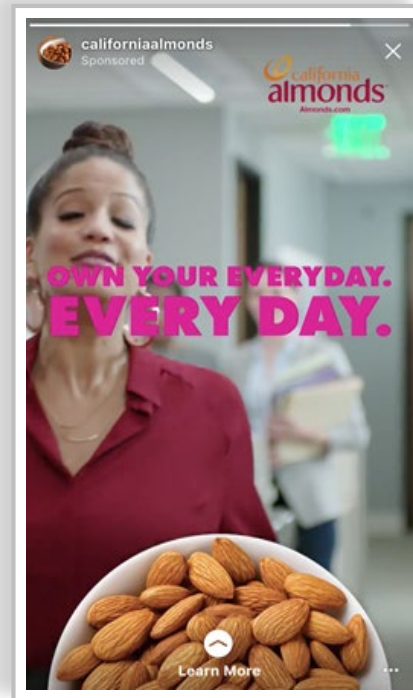


Where our ads aired across NBC channels, including their TV, online and Snap Chat platforms

AND BUILT MOMENTUM FROM THERE



Social Media Advertising



CBS Sports.com March Madness

CONTINUE WORKING WITH CREDIBLE AND RELEVANT SPOKESPEOPLE TO EARN TOP-TIER MEDIA COVERAGE


WomensHealth Health Weight Loss Fitness

The Way Victoria Arlen Starts Every Morning Will Make You Rethink Your Routine

The Paralympian is serving up some major inspo.

8 a.m.: I write out my to-do list during breakfast

"I love breakfast. My go to is one-quarter cup of oatmeal, three egg whites, a handful of blueberries, and a scoop of almond butter. It's a perfect combo of everything I need. I'll pair it with coconut coffee concentrate from Trader Joe's and almond milk plus stevia."



arlen1 22.2K followers View Profile

Victoria Arlen, Paralympian Gold Medalist, ESPN correspondent and semi-finalist on Dancing with the Stars

Almonds drive this entrepreneur

Michele Romanow is a busy woman. As president of Clearbanc, she spends much of her time helping thousands of North America's 50 million self-employed entrepreneurs and freelance contractors access capital. That would be plenty for most people to manage, but Romanow divides her time between the 40-person company she co-founded in 2016 and her other duties as an investor, advising startups she finds as a co-star of CBC's *Dragon's Den* reality TV show.

"Every entrepreneur, as they grow, needs advice and mentorship," Romanow says, noting that each of the dozen companies she has invested in have unique needs.

Romanow's daily schedule can make finding time even to eat tricky, but she manages it with a few key strategies. "For me, it's important that I work out in the mornings, four or five times a week — it will get bumped for something else if it's later in the day," she says.

Her other key practice is eating healthy snacks.



"Almonds are a great source of nutrients, protein and fibre," says Clearbanc president Michele Romanow. Contributed

"I've been a huge eater of almonds since as long as I can remember," she says. "They're a great source of nutrients, protein and fibre. I keep a packet at the bottom of every bag, they're available on planes and in airports, and I have bowls of them all around the office."

By keeping almonds handy, Romanow says she's less

inclined to snack on empty calories. Instead, she's eating something that gives her energy and satisfies her hunger, which keeps her feeling alert and focused on her work.

Romanow has other tips for taming a busy schedule: She suggests picking the three most important things to do in a day and doing the hardest one first. "We all get into cycles where we feel overwhelmed, but by doing the hardest task first, the day gets better and better." If there's a decision to make, she says, make it. "Only two to five per cent of decisions are irreversible. The rest are reversible, so make them as quickly as possible."

She cites former U.S. president Barack Obama as one of her greatest inspirations, not just for how she strategizes but also how she snacks. "I met Obama's chief of staff, who told me almonds are his number one snack," Romanow says. "They're a perfect snack, because they're healthy, a great source of energy, and they're convenient."

Michele Romanow, in Toronto, is a young entrepreneur co-founder of Buytopia.ca and frequently appears on *Dragon's Den* — the Canadian equivalent of *Shark Tank*

best health BEST LOOKS BEST YOU BEST EATS CONTESTS AND GAMES SUB

One of Canada's Busiest Women On How to Be More Productive in Life

The secret to being more productive could be as simple as a Post-it note. Tech entrepreneur and *Dragon's Den* investor, Michele Romanow shares her tips.

MELISSA GREER




photo credit: shutterstock

How to truly be more productive

If you thought your schedule was busy, just wait until you hear what Michele Romanow has on her to-do list. At just 25-years-old, Romanow co-founded the top daily deal site, Buytopia.ca and her entrepreneurial career has only grown from there. Today the Canadian tech entrepreneur juggles managing a business (Clearbanc), speaking engagements, filming for *Dragon's Den*, and more, all while still maintaining some semblance of a healthy lifestyle. We asked the 32-year-old self-proclaimed productivity master to share her top tips for keeping it all together.


What's the first thing you do when you wake up in the morning?

I know this is the wrong answer, but I check my phone to see my schedule for the day and respond to anything urgent that has come in overnight. If there is nothing urgent, I brush my teeth and head to the gym with my trainer Sonia Jhas. She puts me through a different and usually crazy hard workout everyday — some combination of weights and cardio. I like to grab a protein shake afterwards with almond milk and jump in the shower.

Sometimes
there are great
unsolicited
endorsements
that we can
jump on in
relevant cultural
moments

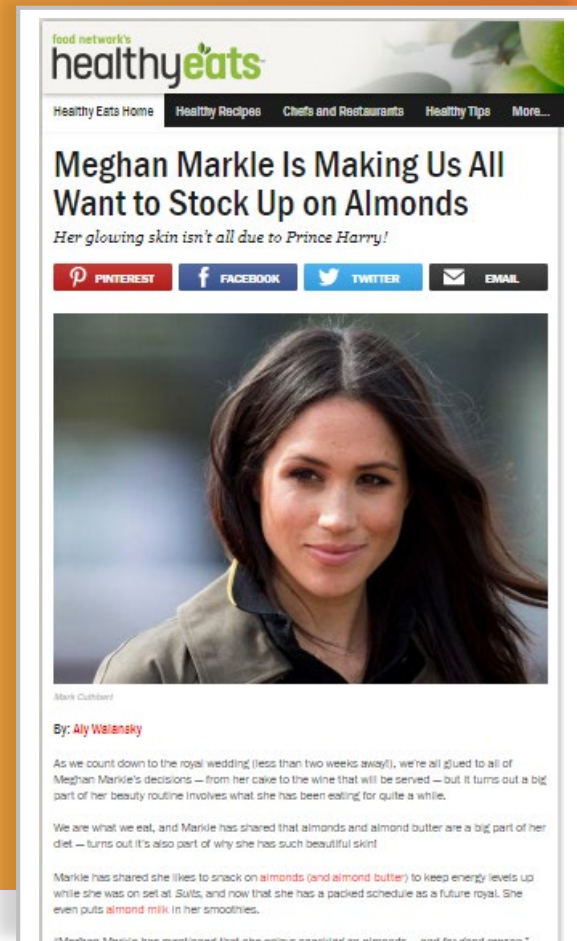
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Why Meghan Markle makes us want to stock up on almonds



Everyone is wondering how do we get the Markle Sparkle...? You might have to go a little 'nuts' to achieve it. Susana Victoria Perez (@susana_vp) has more. Buzz60

And the story caught on across North America




food network's **healthy eats**

Healthy Eats Home Healthy Recipes Chefs and Restaurants Healthy Tips More...

Meghan Markle Is Making Us All Want to Stock Up on Almonds

Her glowing skin isn't all due to Prince Harry!

PINTEREST FACEBOOK TWITTER EMAIL



Mark Cuthbert

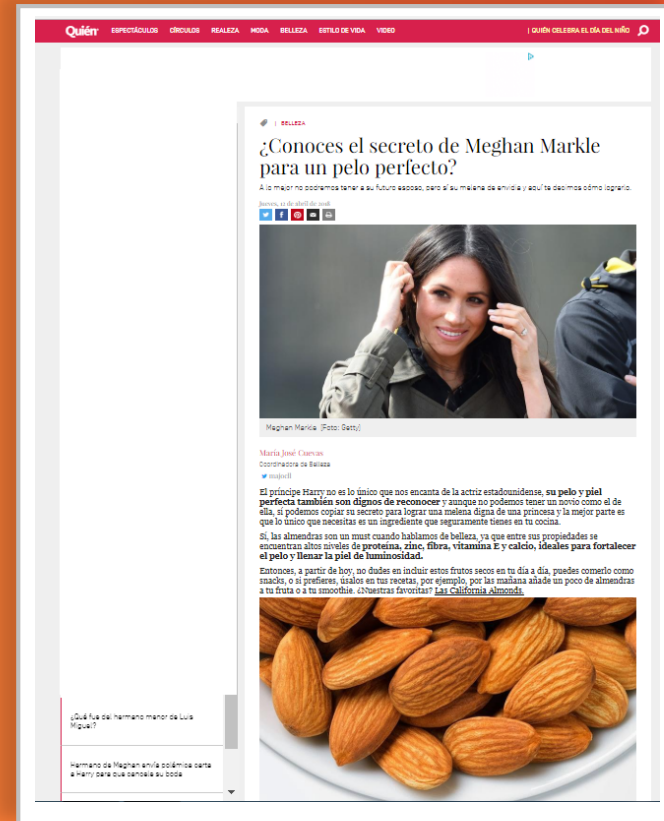
By: **Aly Walensky**

As we count down to the royal wedding (less than two weeks away!), we're all glued to all of Meghan Markle's decisions — from her cave to the wine that will be served — but it turns out a big part of her beauty routine involves what she has been eating for quite a while.

We are what we eat, and Markle has shared that almonds and almond butter are a big part of her diet — turns out it's also part of why she has such beautiful skin!

Markle has shared she likes to snack on almonds (and almond butter) to keep energy levels up while she was on set at *Suits*, and now that she has a packed schedule as a future royal. She even puts almond milk in her smoothies.

Meghan Markle has mentioned that she often snacked on almonds — and for good reason!




Quién ESPECTÁCULO CINELEER REALIZA MODA BELLEZA ESTILO DE VIDA VIDEO | ¿QUIÉN CELEBRA EL DÍA DEL NIÑO?

¿Conoces el secreto de Meghan Markle para un pelo perfecto?

A lo mejor no podemos tener a su futuro esposo, pero sí su melena de envidia ¡y así te damos cómo lograrla.

Beveva y disfrútalo más




Meghan Markle (Foto: Getty)

Maria José Cuevas
Columnista de Belleza

El príncipe Harry no es lo único que nos encanta de la actriz estadounidense, su pelo y piel perfecta también son dignos de reconocer y aunque no podemos tener un novio como el de ella, sí podemos copiar su secreto para lograr una melena digna de una princesa y la mejor parte es que lo único que necesitas es un ingrediente que seguramente tienes en tu cocina.

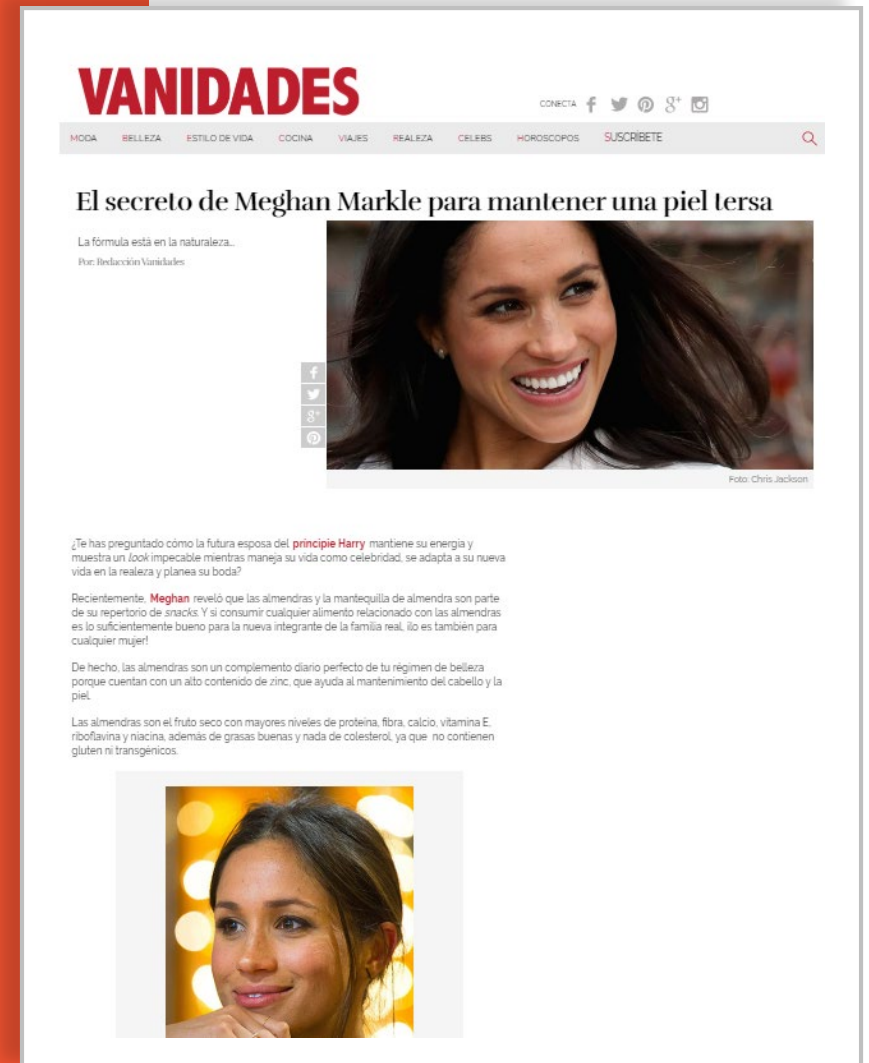
Si, las almendras son un must cuando hablamos de belleza, ya que entre sus propiedades se encuentran altos niveles de proteína, zinc, fibra, vitamina E y calcio, ideales para fortalecer el pelo y llenar la piel de luminosidad.

Entonces, a partir de hoy, no dudes en incluir estos frutos secos en tu día a día, puedes comerlo como snacks, o si prefieres, úsalos en tus recetas, por ejemplo, por las mañanas añade un poco de almendras a tu fruta o a tu smoothie. ¿Nuestras favoritas? **Las California Almonds.**



¿Qué fue de hermano menor de Luis Miguel?

Hermano de Meghan en la boda más cara a Harry será que tendrá su boda



VANIDADES CONECTA f t p g+ i

MODA BELLEZA ESTILO DE VIDA COCINA VIAGES REALIZA CELEBR HOROSCOPOS SUSCRIBETE

El secreto de Meghan Markle para mantener una piel tersa

La fórmula está en la naturaleza...

Por: Redacción Vanidades




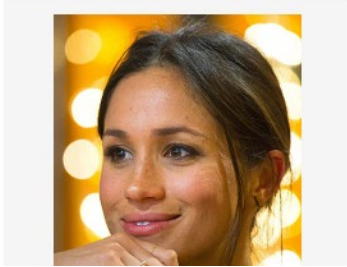
Foto: Chris Jackson

¿Te has preguntado cómo la futura esposa del príncipe Harry mantiene su energía y muestra un look impecable mientras maneja su vida como celebridad, se adapta a su nueva vida en la realeza y planea su boda?

Recientemente, **Meghan** reveló que las almendras y la mantecilla de almendra son parte de su repertorio de snacks. Y si consumir cualquier alimento relacionado con las almendras es lo suficientemente bueno para la nueva integrante de la familia real, ¡lo es también para cualquier mujer!

De hecho, las almendras son un complemento diario perfecto de tu régimen de belleza porque cuentan con un alto contenido de zinc, que ayuda al mantenimiento del cabello y la piel.

Las almendras son el fruto seco con mayores niveles de proteína, fibra, calcio, vitamina E, riboflavina y niacina, además de grasas buenas y nada de colesterol, ya que no contienen gluten ni transgénicos.



PROACTIVE PROMOTION OF ALMOND MILK

Almond milk is the 2nd largest almond category at retail in terms of almond volume.

Chef Dan Churchill, the personal chef for Lindsey Vonn for the 2018 Winter Olympics and our Almond Milk Spokesperson, featured almond milk hot chocolate on the Today Show live from athlete's village.





ALL THE
PLACES
ALMOND
MILK
CAN GO



INSPIRING CURRENT ALMOND MILK
CONSUMERS WITH VERSATILITY MESSAGES



BRIT + CO



Moving in to this fiscal year, we've secured even more exciting media to maximize our reach to these busy consumers.



CBS SPORTS



UPCOMING HIGHLIGHTS

- CBS Sports.com streaming of Super Bowl 2019
- Women's World Cup 2019 sponsor

WHERE IS THE ALMOND EMOJI?

JOIN THE CAUSE AND
SIGN THE PETITION

Sign today!

Application will be sent to the Unicode
Consortium in spring 2019

www.almonds.com/emoji-signup

NECESSARY:



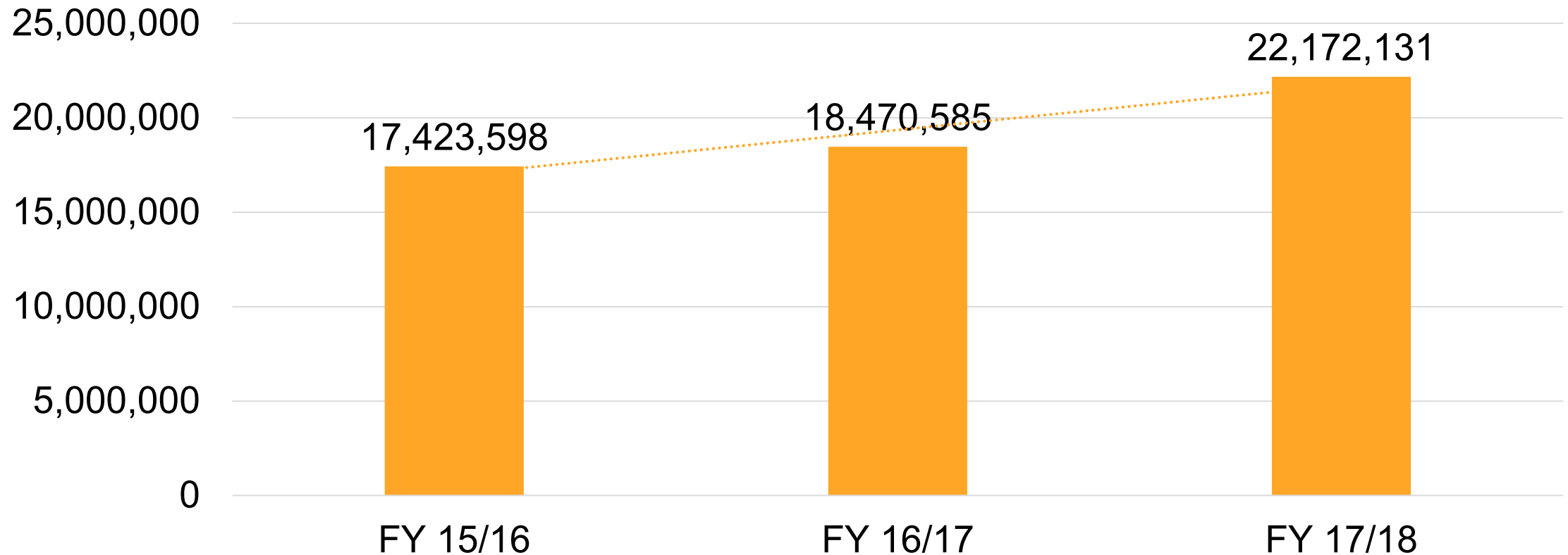
Food, water, shelter, love...
and also an almond emoji.



MEXICO

MEXICO SHIPMENT GROWTH

Mexico Shipments (Pounds)



KEY MEXICO OPPORTUNITIES

- Drive increased affinity and usage for almonds with our defined consumer target audience by positioning almonds as the perfect healthy snack to help them be at their best on weekdays.
- Leverage health professionals and influencers to drive awareness and credibility



MEXICO TARGET AUDIENCE: SUCCESSFUL SAVORISTS



Purchase Power

Socio economic status ranges from C+-A+



Unique

Consider themselves unconventional and like to feel different from the crowd



Smart Shoppers

Looks for a balance of quality and price when making purchases.

20.83% of Mexico
39,211.401 Million Adults

48% males



52% females

Routine Oriented

Like to follow a similar daily regimen



Image Conscious

Take care of their appearance and like to be considered healthy.

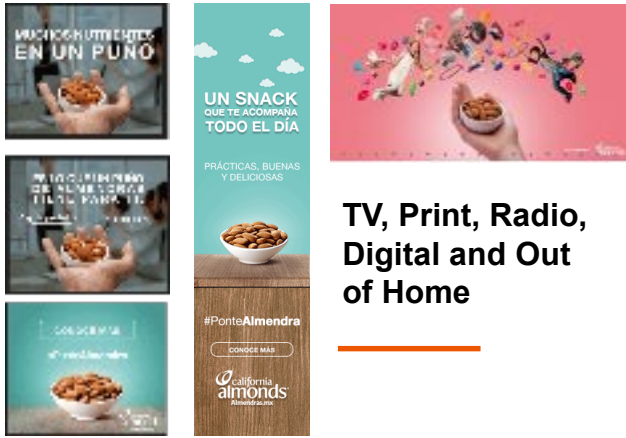


Snackers

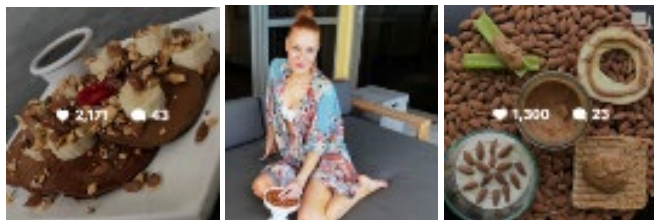
Often snacks between meals. Consider themselves the key decision maker of the snacks they consumer



Media roundtable to introduce Almond Board of California to health and wellness media in Mexico



TV, Print, Radio, Digital and Out of Home



37 Posts = 895K Reach & 37K Interactions

ADVERTISING

EVENTS

INFLUENCERS

SOCIAL MEDIA

MEDIA RELATIONS



Target Audience

Successful Savorists - 21% of adults
Snacking, routines, H&W, purchase power

Nearly 10,000 Facebook followers and 500 Instagram followers



More than 60 earned articles in 4 months with 20.85 million impressions. Negotiated partnership for regular appearances on Pásele Yo Invito, a national TV show with 4.4 million impressions.

For those days where 24 hours isn't enough, Ponte Almendra. 23 almonds have 6 grams of protein that help you to have the energy you need to take on your day.



6:30
GYM

9:02
Jefe Intolerante

21:23
Paseo de Rufo

22:10
Cena con amigos

PARA 24 HORAS QUE PARECEN MÁS, PONTE ALMENDRA

23 ALMENDRAS TIENEN 6 GRAMOS DE PROTEÍNA, QUE TE AYUDAN A TENER LA ENERGÍA QUE NECESITAS PARA ENFRENTAR TU DÍA.

Almendras.mx | **california almonds**



6:15
Yoga

7:45
Tráfico

20:30
Super

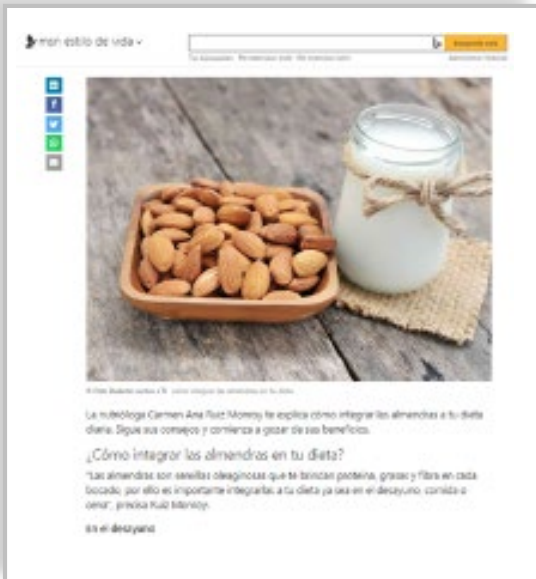
22:10
Cena Romántica

PARA 24 HORAS QUE PARECEN MÁS, PONTE ALMENDRA

23 ALMENDRAS TIENEN 6 GRAMOS DE PROTEÍNA, QUE TE AYUDAN A TENER LA ENERGÍA QUE NECESITAS PARA ENFRENTAR TU DÍA.

Almendras.mx | **california almonds**

WE'RE MAKING GREAT IN-ROADS WITH EARNED MEDIA COVERAGE



men estilo de vida v

El artículo muestra una foto de un cuenco de almendras y un tarro de leche. El texto principal dice: "La nutricionista Carmen Ana Ruiz Moreno te explica cómo integrar las almendras a tu dieta diaria. Sigue sus consejos y comienza a gozar de sus beneficios."

¿Cómo integrar las almendras en tu dieta?

"Las almendras son semillas oleaginosas que te brindan proteína, grasas y fibra en cada bocanada, por eso es importante integrarlas a tu dieta ya sea en el desayuno, comida o cena", explica Ruiz Moreno.

es el desayuno



ACTITUD FCH

4 razones para comer almendras en verano

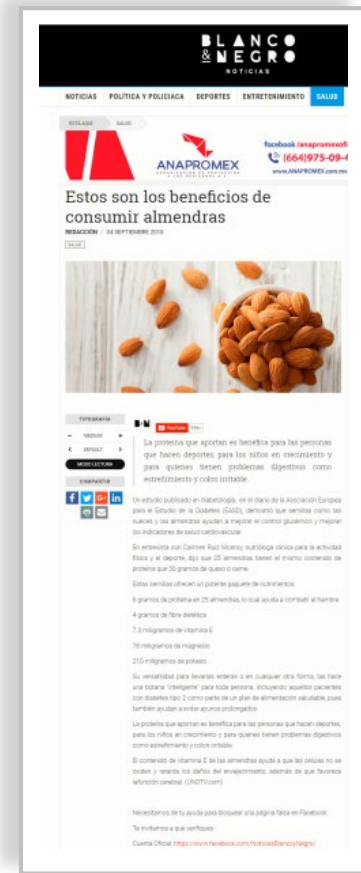
El artículo incluye una foto de una mano que sostiene un cuenco de almendras y otro de un cuenco de frutas. El texto comienza: "El verano es la época perfecta para disfrutar de las almendras, una fruta que aporta beneficios para la salud."



ANAPROMEX

Almendras, semillas que ayudan a controlar el azúcar y el colesterol

El artículo comienza con: "Las almendras son ricas en grasas saludables y fibra, lo que las convierte en una excelente opción para controlar el azúcar y el colesterol."



BLANCO & NEGRO NOTICIAS

Estos son los beneficios de consumir almendras

El artículo comienza con: "Las almendras son una excelente opción para controlar el azúcar y el colesterol, además de ser ricas en fibra y grasas saludables."

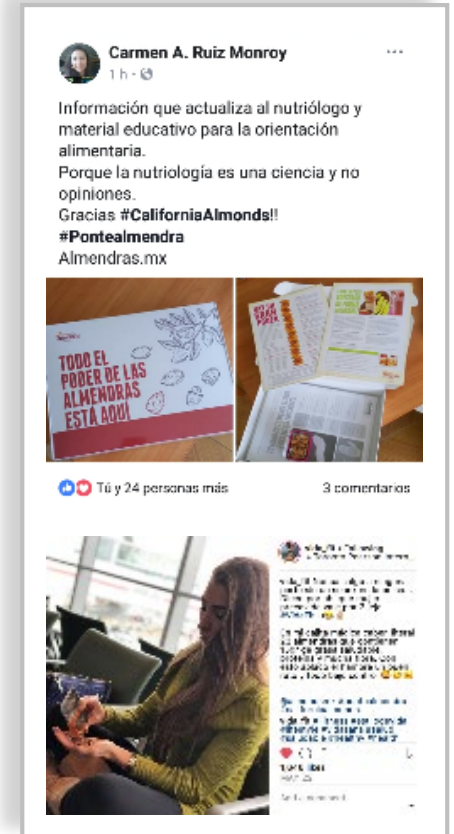
AND EDUCATING HEALTH PROFESSIONALS TO BECOME ALMOND ADVOCATES



Events



Harvest Tour 2018



Social Media

Thank you!

