



2017

THE ALMOND CONFERENCE

EUROPEANS' APPETITE FOR ALMONDS ENDURES AND GROWS

Room 306-307 | December 6 2017



CEUs – New Process

Certified Crop Advisor (CCA)

- Sign in and out of each session you attend.
- Pickup verification sheet at conclusion of each session.
- *Repeat this process for each session, and each day you wish to receive credits*

Pest Control Advisor (PCA), Qualified Applicator (QA), Private Applicator (PA)

- Pickup scantron at the start of the day at first session you attend; complete form.
- Sign in and out of each session you attend.
- Pickup verification sheet at conclusion of each session.
- Turn in your scantron at the end of the day at the last session you attend.

Sign in sheets and verification sheets are located at the back of each session room.

AGENDA

- **Craig Duerr**, Campos Brothers Farms, moderator
- **Beth Van Meter**, Almond Board of California
- **Dariela Roffe-Rackind**, Almond Board of California
- **Kathryn Martino**, Porter Novelli, UK





EU Trade & Regulatory Affairs

Beth Van Meter

Sr. Specialist, Global Technical &
Regulatory Affairs



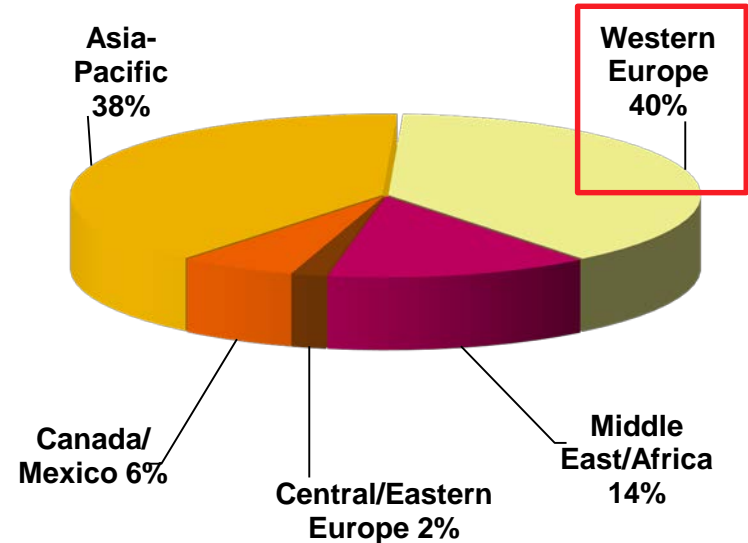
Pre-Export Check (PEC) Program Update

- PEC began on August 1, 2015
- CY 2016/17, 14,503 PEC Analysis completed
- EU is the almond industry's largest export market
- ABC met with EU port authorities in September 2017. Authorities all express great trust in the Pre-Export Check program.
- Concerns loom around Low Grade Product that continues to filter into the EU which could potentially harm the reputation of the PEC program.
- **In 2017, US peanut's PEC program was suspended due to increased aflatoxin rejections.**
- California Almonds are the only tree nut that maintains a Pre-Export Check Program.

2016/17 Crop Year

- **14,503 PEC Analyses**

ALMOND EXPORTS BY REGION



Rapid Alert Rejections Due to Aflatoxin

Alert ID Number	Country	Date	PEC	Notes
2017.AAE	Italy	1/3/2017	NO	Non-handler shipped low grade product. Shipped from huller/sheller facility.
2017.0021	Slovakia	1/5/2017	N/A	Sample off retail shelf.
2017.ATZ	Italy	5/3/2017	NO	Known exporter and handler shipped low-grade product. Consignment sent back to US for further processing.
2017.AUV	Italy	5/8/2017	NO	Known exporter and handler shipped low-grade product. Consignment sent back to US for further processing
2017.BMP	Italy	8/14/2017	YES	PEC consignment, re-exported
2017.CDO	Spain	10/19/2017	Partial	Known exporter and handler shipped mixed load of edible and low grade product. Blanched low-grade product. A portion of this consignment had PEC. Pending disposition.
2017.BZZ	Spain	11/10/2017	NO	Known exporter and handler shipped low grade product. Pending disposition.
2017.CAA	Spain	11/10/2017	NO	Known exporter and handler shipped low grade product. Pending disposition.

Low-Grade Product

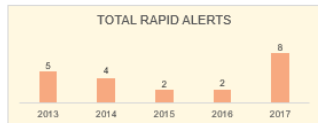


LOWER GRADE ALMONDS: POTENTIAL IMPACT ON EU PEC PROGRAM

Shipments of lower grade almonds and/or "hash" to the EU could raise concerns if not shipped and documented properly

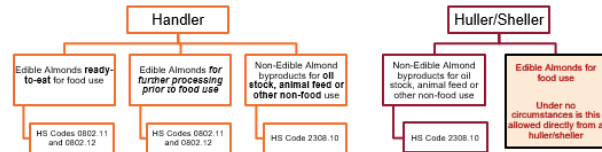
In the first eleven months of 2017, there have been eight European Union (EU) aflatoxin Rapid Alert Notifications, resulting in rejected consignments at the port. The number of notifications/rejections this year already exceeds the past two years combined (4 total rejections for 2015 and 2016). This increase has raised concerns in the EU, among customers and import authorities. The additional scrutiny could place the Pre-Export Certification (PEC) program for almonds in jeopardy.

Of the rejections this year, six can be attributed to lower grade product which was shipped without aflatoxin testing or analysis – one of those rejections was for "hash" shipped directly from the huller/sheller. This was an illegal shipment under the provisions of the Federal Marketing Order, and resulted in a compliance violation including USDA action. The other two rejections were consignments of lower grade product with high serious damage and no aflatoxin certificate.



Currently, Canadian Wheat and California Almonds are the only two crops and origins which have been granted PEC approval under Article 23 by the European Commission. Peanuts grown in the United States recently had their PEC status revoked due to prior-year increased aflatoxin rejections seen in that crop. The risk is that if PEC status for almonds was ever revoked, it would result in inconsistent levels of checks applied at the discretion of each EU port, likely resulting in increased controls.

There are four legal ways in which almonds for food (edible) or feed (non-edible) can be shipped to the EU:



All shipments (food or feed) for the EU should include the appropriate aflatoxin analysis – PEC Certificate for consignments ready for immediate consumption, and an aflatoxin certificate of analysis (COA) for shipments intended for animal feed. Following are further details on aflatoxin levels and documentation requirements:

Product	Total Aflatoxin (ppb)	B ₁ Aflatoxin (ppb)
Almonds for Food (RTE)	10	8
Almonds for Food (further processing)	15	10
Almond Byproducts for Feed	*20	*20

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	Handler	Huller/sheller
Food	Almonds intended for immediate human consumption (Ready-to-Eat) food use should be shipped to the EU under the Harmonized System (HS) Code specified in Chapter 8 Edible Fruit and Nuts (HS 0802.11 and 0802.12) "Almonds fresh or dried, whether or not shelled or peeled".	This is the only category eligible for PEC documentation. Under the Federal Marketing Order for Almonds Grown in California, Huller/Shellers are precluded from introducing almonds intended for food/human consumption into any channel of trade domestically or abroad. This would include almonds shipped "for further processing."
Food	Almonds which are lower quality grades intended for human consumption but which require further processing such as sorting/cleaning prior to food use should be shipped to the EU under the Harmonized System (HS) Code specified in Chapter 8 Edible Fruit and Nuts (HS 0802.11 and 0802.12) "Almonds fresh or dried, whether or not shelled or peeled".	NOT eligible for PEC documentation. In the U.S., these almonds are still subject to the requirements of the mandatory pasteurization program. For Europe, the almonds must be CLEARLY LABELED indicating "product shall be subjected to sorting or other physical treatment to reduce aflatoxin contamination before human consumption or use as an ingredient in foodstuff." This statement must be included on the label of each individual bag, box etc. or on the original accompanying document. This labeling clearly distinguishes these goods from RTE product upon arrival in the EU. Per section 981.16 To Handle, anyone who puts almonds grown in the area of production into any channel of trade for human consumption worldwide, would be considered as "handling" almonds, and subject to all requirements as a "Handler."
Feed	Lower grade product not intended for food use (e.g. for use in feed, oil crushing) should be shipped to the EU under the Harmonized System (HS) Code specified in Chapter 23 Residues and Waste from the Food Industries (HS 2308.00) "Vegetable materials and vegetable waste, vegetable residues and by-products; whether or not in the form of pellets, of a kind used in animal feeding, not elsewhere specified or included". It should never be shipped to the EU under the HS code for human food if that is not the intended use.	Handlers may introduce non-edible (non-food use) almonds into commerce through the accepted user program, or directly to customers outside the United States, for non-human consumption uses. Such product should be labeled as "non-processed" and be identified as "for non-human consumption." NOTE: EU regulations do not permit imports intended for feed to be diverted to food use. If this occurs the importer and exporter will be subject to enforcement activity as outlined in EU regulations or requirements as a handler under the marketing order. Huller/Shellers may introduce non-edible almond byproducts (e.g. "hash") into commerce for oil stock, animal feed or other uses not intended for food/human consumption. Should such product find its way into human consumption channels, and the huller/sheller was aware of the intended use, they could be held accountable, and subject to enforcement by USDA as well as subject to requirements as a handler under the marketing order.

For all EU shipments, the appropriate HS Codes and documentation should be used to clearly designate the product use. Almonds imported under the For Further Processing provision will likely be subject to aflatoxin testing or other verification by import authorities after processing to ensure they comply with EU requirements.

Feed/oilstock exports under HS Code (2308.00) are subject to the scrutiny of EU import authorities responsible for feed controls. It is the responsibility of EU authorities to monitor shipments to ensure such product does not make its way into human channels. The responsible Handler or Huller/Sheller shipping non-edible almond feed/oilstock to the EU should work with their customer to clearly understand intended use.

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Pesticides and Endocrine Disruptors

Endocrine Disruptors, Carcinogens, Mutagens, & Toxic for Reproduction

The EU is reviewing all pesticides to understand if they have endocrine disruptor, carcinogen, mutagen, or toxic for reproduction properties. EU legislation requires that use of such compounds be “cut-off” from use in the EU. Furthermore, once a compound has been “cut-off”, EU farmers will not be allowed to use these compounds and import Maximum Residue Limits (MRLs) will be removed.

US and Global Risk Assessment Process

- **Hazard x Exposure = Risk to human health**
- To do a complete risk assessment, scientists need both how hazardous the compound is, as well as risk of exposure to the human body. (e.g. skin contact, diet, water, air etc.)

EU Risk Assessment Process

- **Hazard x ~~Exposure~~ = Risk to human health**
- If a compound meets one of the cut-off criteria, then EU only considers the hazard. It **does not** account for human exposure, creating an incomplete picture of risk to human health.

Glyphosate (Roundup)

On November 27, 2017 European Commission voted in favor of extending glyphosate’s registration for 5 years.

EU Port Authority Tour of CA Almonds

- Mid-February 2018
- Confirmed: Port Authorities from Greece, Romania, Netherlands, Germany, and Spain
- Confirmed: EU Rapid Alert Office representative
- Authorities will participate in a seminar that will walk them through the entire supply chain from the field all the way to the port
- Several successful tours in the past have resulted in the ABC being invited to speak about the industry in-country
- **If you would like to volunteer your facilities for this tour please contact Beth Van Meter at evanmeter@almondboard.com**





Thank You!

Beth Van Meter

Senior Specialist, Global Technical &
Regulatory Affairs

209.343.3256

evanmeter@almondboard.com



EUROPEANS' APPETITE FOR ALMONDS ENDURES AND GROWS



Dariela Roffe-Rackind
Director Europe & Global Public Relations

Today



QUIZ TIME!

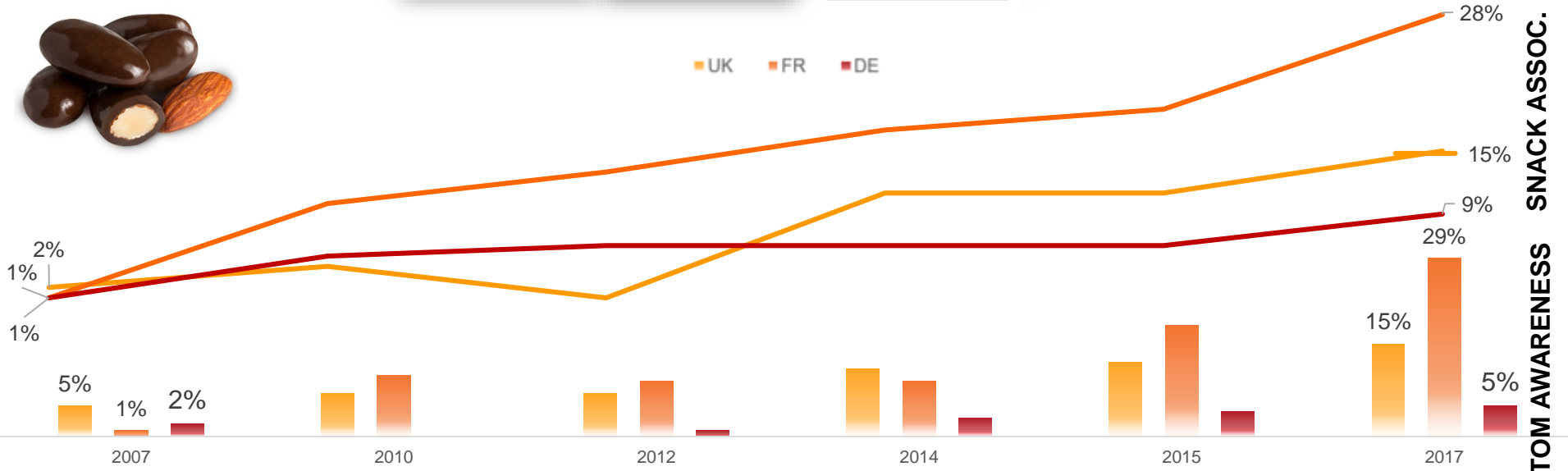


A narrow, curved street in a city, likely London, with tall buildings and a Union Jack flag hanging from a building. The street is paved with double yellow lines and has a few people walking. The scene is framed by a white border.

SOME
BACKGROUND



■ UK ■ FR ■ DE



SOURCE: 2017 AAU & 2017 Snacking Study

A stack of colorful macarons on a white plate. The macarons are in various colors: red, yellow, orange, and brown. They are arranged in a stack, with some showing the filling. The plate is on a blue and white patterned cloth. The background is a light blue wall.

ALMONDS
AS AN INGREDIENT



**THERE IS TREMENDOUS
INNOVATION IN THE INGREDIENT
MARKET IN EUROPE**



QUIZ TIME!

TIME!

QUIZ

EUROPE INTRODUCED _____%
OF NEW ALMOND PRODUCT
INTRODUCTIONS IN 2016
(share of global introductions)

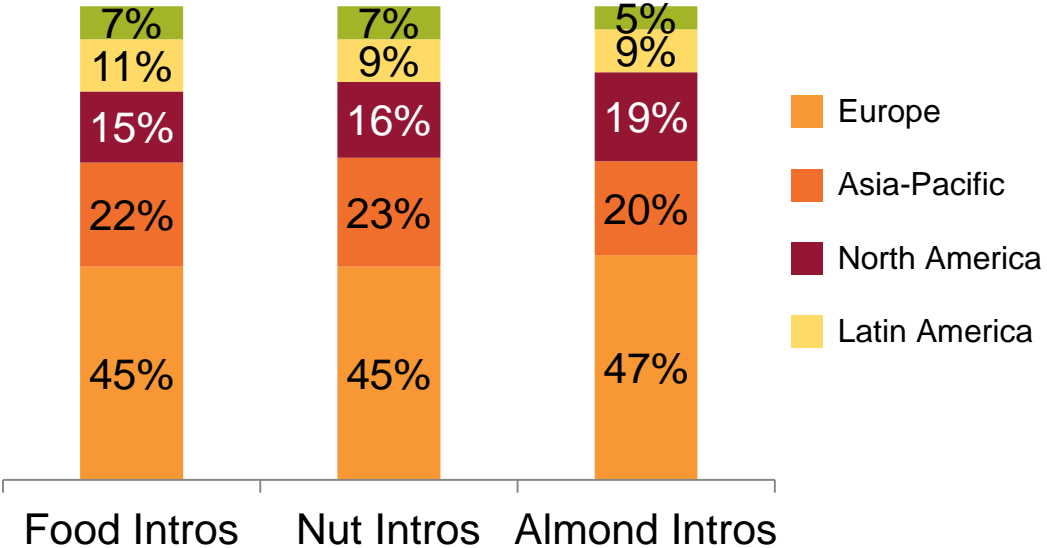
ANSWER

47%

of all global new
product introductions!

EUROPE DRIVES THE LARGEST SHARE OF INTRODUCTIONS ACROSS THE GLOBE

2016 Global Food, Nut, and Almond Introductions
Regional Share



SOURCE: 2017 Innova Report



AND...

EUROPE INTRODUCED MORE THAN 2X AS MANY ALMOND PRODUCTS AS ANY OTHER REGION

2016 Global Food, Nut, and Almond Introductions: Regional Share	
Region	Almond Intros
Europe	4,469
Asia-Pacific	1,866
North America	1,772
Latin America	852
Middle East & Africa	463
Total	9,422

EUROPE LED ALL OTHER REGIONS IN 4 OF THE TOP 5 CATEGORIES FOR ALMOND INTRODUCTIONS



Bakery = 52%



Snacks = 37%



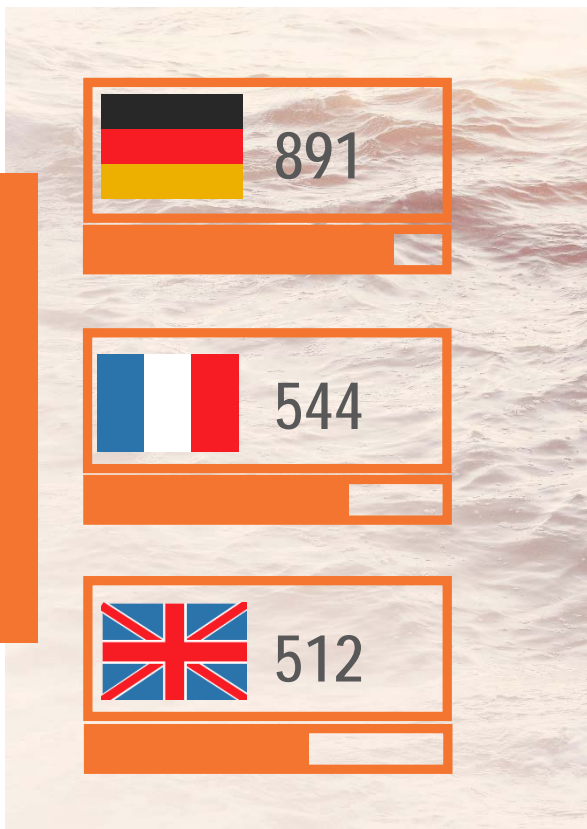
Bars (led by North America = 42%; Europe = 34%)



Confectionery = 61%



Cereal = 42%



NEW PRODUCT DEVELOPMENT DRIVEN BY UK, GERMANY, FRANCE

2016 Global Almond Introductions by Country		
Rank	Region	# of introductions (2016)
1	United States	
2	Germany	891
3	France	544
4	United Kingdom	512
5	Spain	343



RESEARCH CONDUCTED 2016-2017

CONSUMER AAU

CONSUMER MOBILE ETHNOGRAPHY

GERMANY DEEP-DIVE

(ALL CATEGORIES)

EU3 SUSTAINABILITY STUDY

ADVERTISING CREATIVE PERFORMANCE TESTING

EU3 SNACKING STUDY

CPG AAU

2016 GLOBAL PERCEPTIONS

EU3 IRI STUDY (SNACKING)



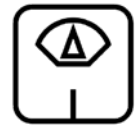
UK
GAINING MOMENTUM

I'm feeling out of control, constantly struggling with my weight, yo-yo dieting, longing for a healthier lifestyle

UK JANE



FOOD EXPLORER



WEIGHT MANAGEMENT



HEALTH-CONSCIOUS



THE GO-TO



ALWAYS ON

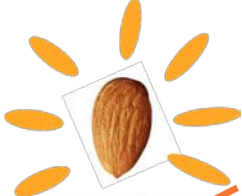


MULTI-TASKER

I'd love to find a mid-day snack that's healthy, satisfying and guilt free

I'm feeling out of control, constantly struggling with my weight, yo-yo dieting, longing for a healthier lifestyle

UK JANE



FOOD EXPLORER



WEIGHT MANAGEMENT



THE GO-TO



HEALTH-CONSCIOUS



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MULTI-TASKER

I'd love to find a mid-day snack that's healthy, satisfying and guilt free

DIGITAL



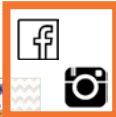
PRINT



MOBILE



SOCIAL



PR



ADVOCATE



VIDEO



GAINING MOMENTUM



Awareness

Association with Snacking

Volume

Value

#1 in Healthfulness

#1 Positive Story Recall



QUIZ TIME!

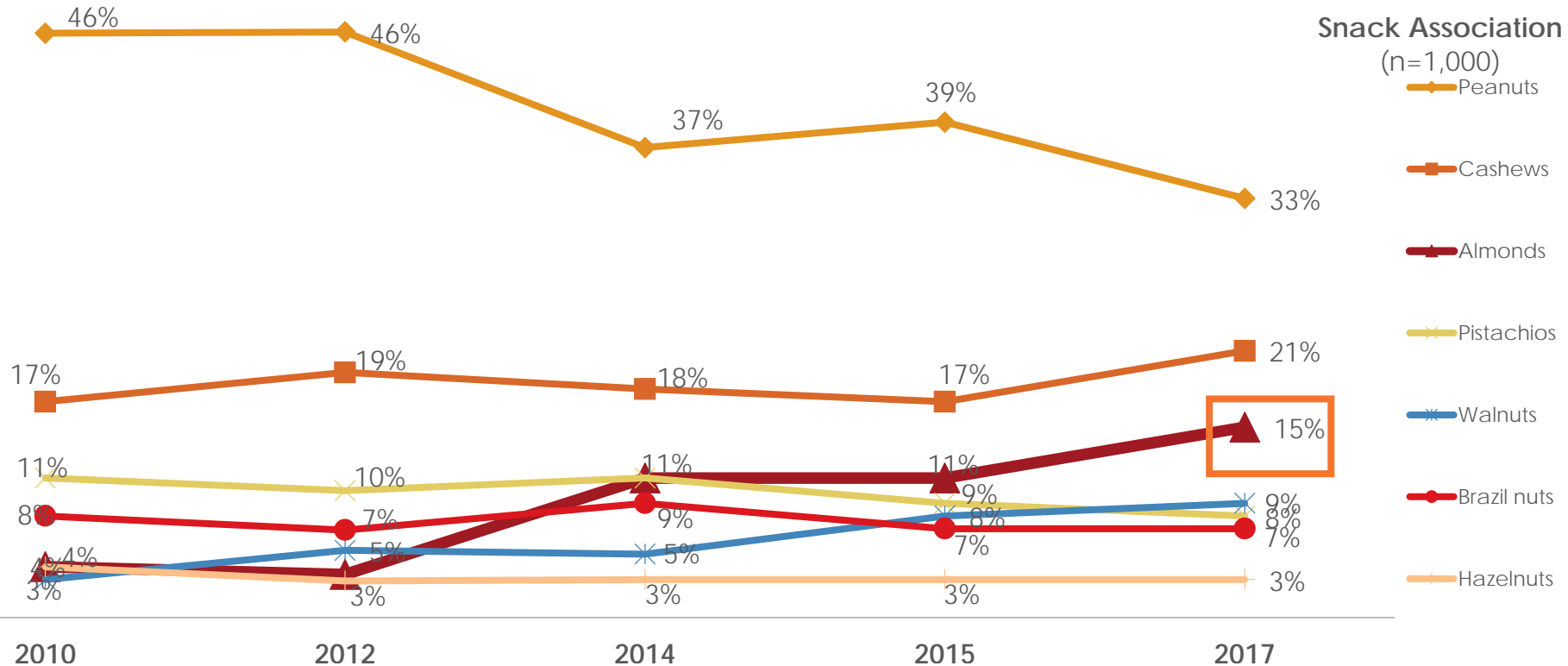
TIME!
QUIZ

ALMONDS ARE RANKED 3rd
IN THE UK FOR
SNACK ASSOCIATION
-WHAT NUT IS #1?
-WHAT NUT IS #2?

ANSWER

#1 NUT = PEANUTS
#2 NUT = CASHEWS

SNACK ASSOCIATION





WHAT WE'RE DOING

TOP 3 OPPORTUNITIES IN UK



1

Differentiate almonds in health through weight management, portion control and usage ideas

2

Communicate on key motivational area-tide me over!

3

Tell our sustainability story even more proactively

A dramatic image of a dragon breathing fire, with the text "FRANCE HOT RIGHT NOW" overlaid in a white-bordered box. The dragon is positioned in the lower center, breathing a large plume of bright orange and yellow flames that fills the left side of the frame. The background is dark and textured, suggesting a cave or a rocky environment. The text is centered within a white rectangular border.

FRANCE
HOT RIGHT NOW

I live a balanced, healthy life and approach food with an "everything in moderation" mentality.

I'm concerned about environmental issues and the impact I can have on the planet.

FR JANE



ROUTINE SNACKERS



CULINARY-INCLINED



HEALTH-EMPOWERED



PURCHASE POWER



SOCIAL AT HOME



SELF-CARE

I need snacks that are natural, unprocessed, and can keep me satisfied in between meals.



ROUTINE SNACKERS



CULINARY-INCLINED



HEALTH-EMPOWERED



PURCHASE POWER



SOCIAL AT HOME



SELF-CARE

FR JANE



J'❤️



MOBILE



DIGITAL

PRINT



FR JANE



SOCIAL



PR



ADVOCATE



VIDEO



ALMONDS ARE HOT IN FRANCE



Top-of-Mind Awareness

Consumer Perceptions

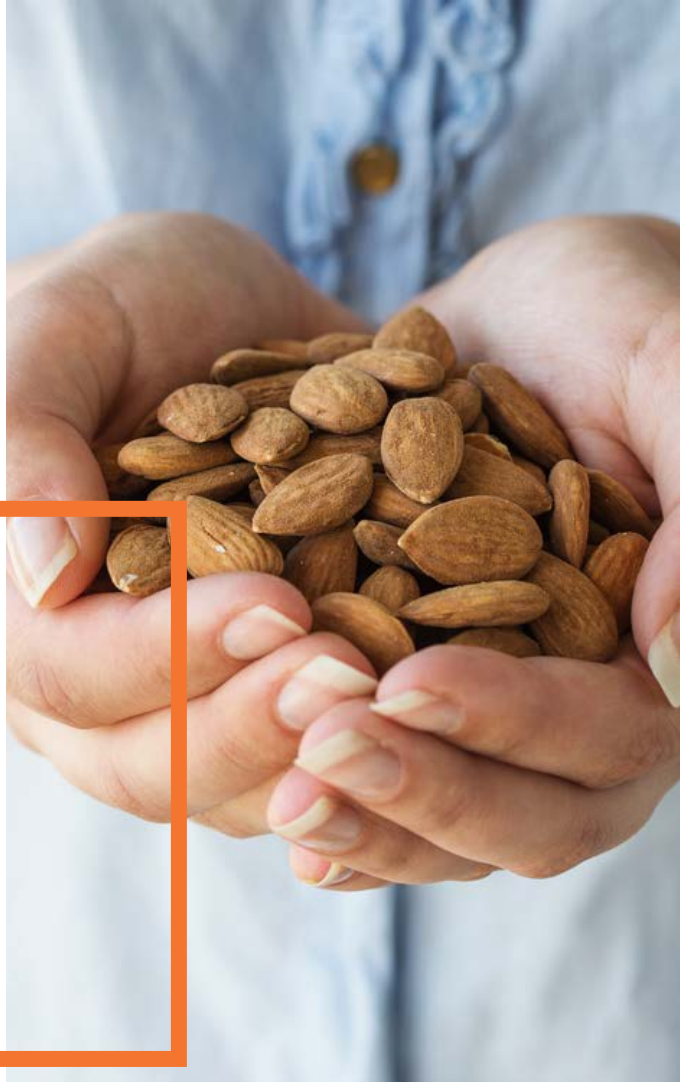
Snacking Association

Volume

Value

#1

- ✓ **HEALTHIEST NUT**
- ✓ **NUT EATEN AS A SNACK**
- ✓ **NUT POSITIVE STORY RECALL**
- ✓ **AVERAGE CONSUMPTION**
- ✓ **LIKING SCORE**
- ✓ **BAKING ASSOCIATION**





QUIZ TIME!

TIME!

QUIZ

WHAT WAS THE % OF
TOP-OF-MIND AWARENESS
OF ALMONDS IN 2007?
(among French Jane)

ANSWER

1% = 2007

TIME!

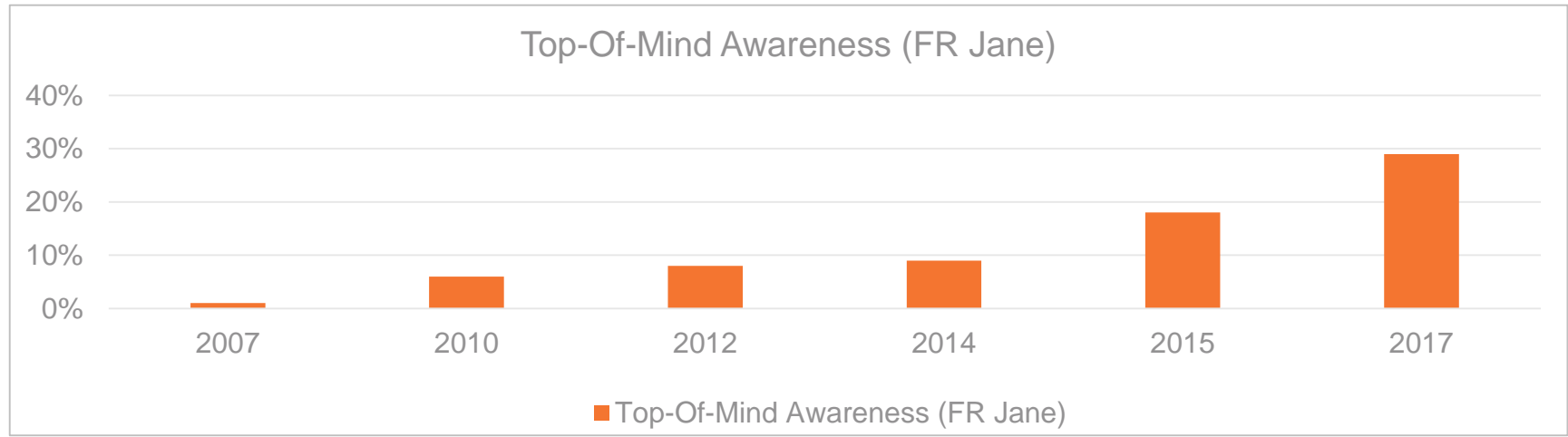
QUIZ

WHAT WAS THE % OF
TOP-OF-MIND AWARENESS
OF ALMONDS IN 2017?
(among French Jane)

ANSWER

29% = 2017

ALL MEASURES HAVE SEEN SIGNIFICANT GROWTH THE PAST TWO YEARS!
 AND *DOUBLE-DIGIT* GROWTH IN TOP-OF-MIND AWARENESS AMONG FRENCH JANES (29%, +11pts).



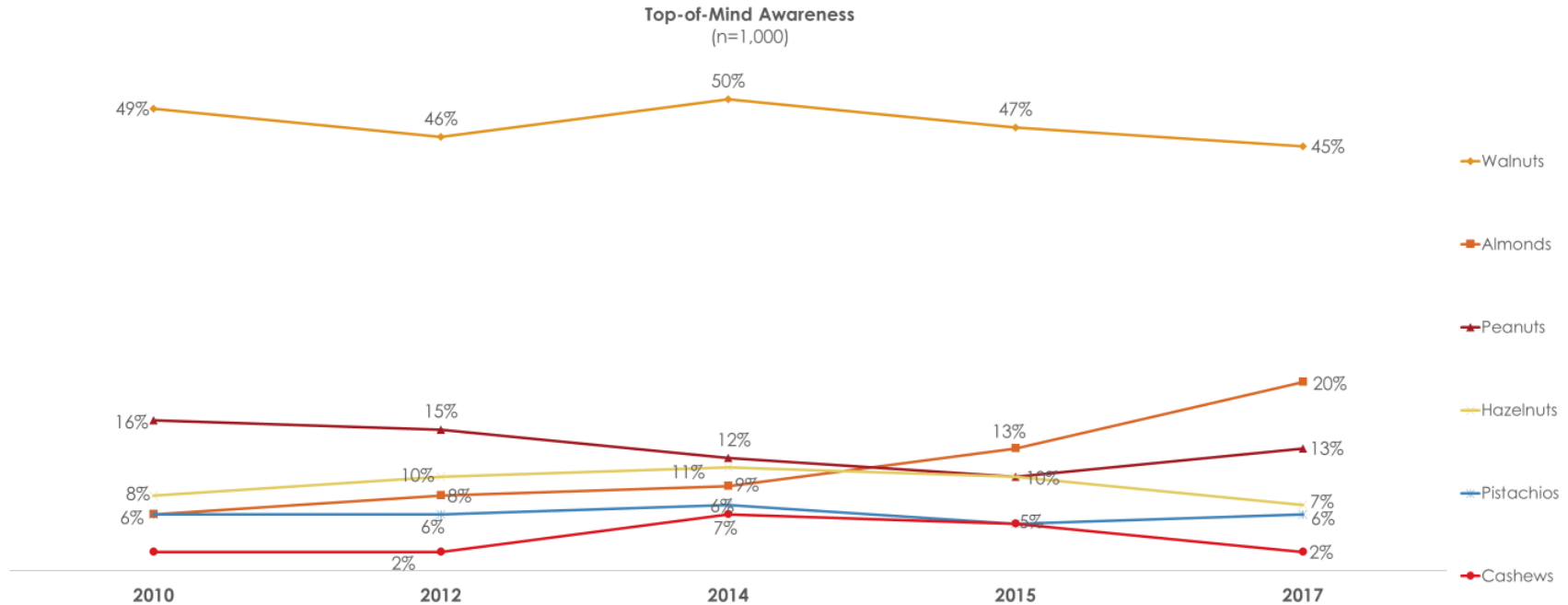
FRANCE			
TOM Awareness (first mention)	Total Pop.	20%	+7 pts from 2015
TOM Awareness (first mention)	FR Janes	29%	+11
Total Awareness (any mention)	Total pop.	61%	+11
Total Awareness (any mention)	FR Janes	63%	+8
Association with Snacking	Total Pop.	28%	+9
Association with Snacking	FR Janes	35%	+9

TIME!
QUIZ

ALMONDS ARE THE #2 NUT FOR
TOP-OF-MIND AWARENESS IN
FRANCE.

WHAT NUT IS #1 IN FRANCE?

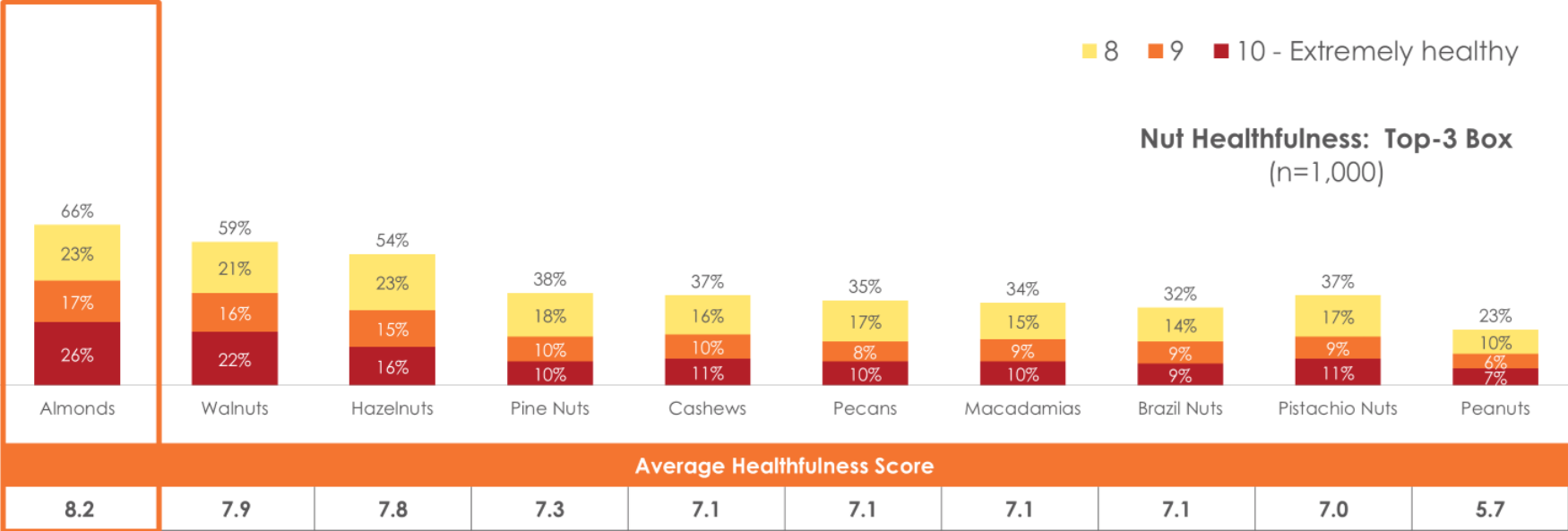
TOP-OF-MIND AWARENESS



Q1: When you think of nuts, which nuts come to mind? (Open-end)

SOURCE: 2017 France Consumer AAU

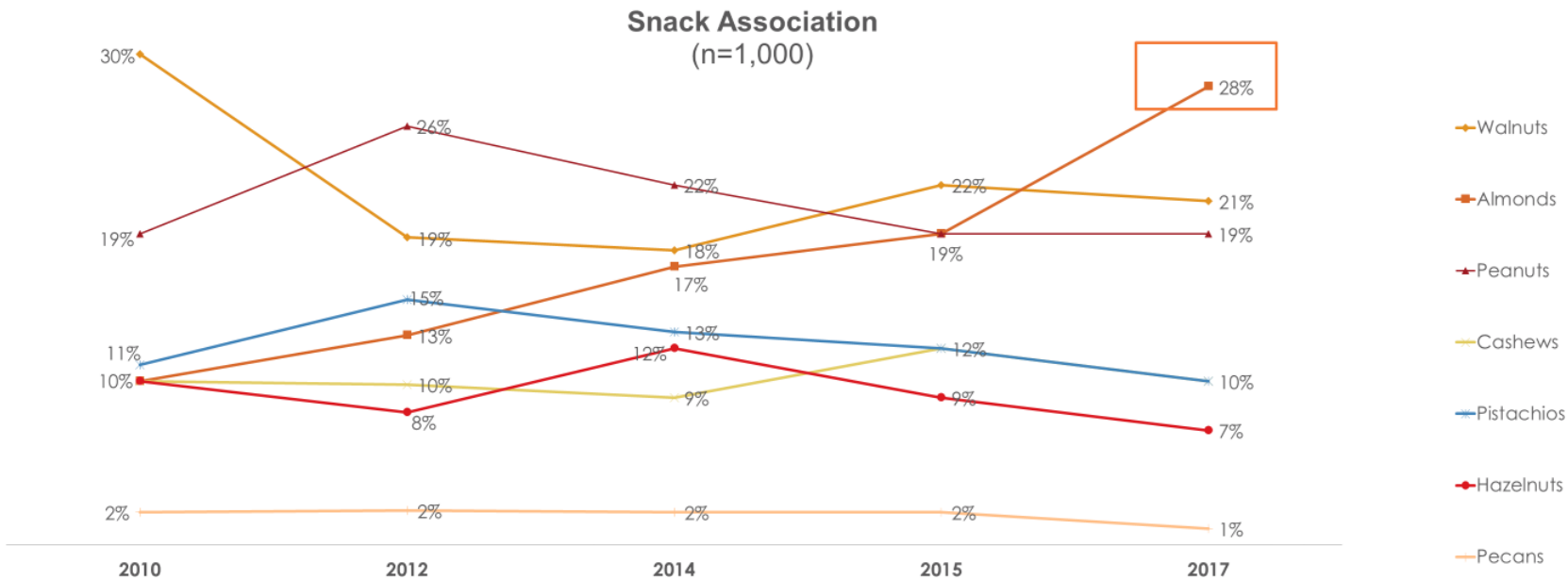
BUT ALMONDS LEAD WALNUTS IN HEALTH PERCEPTIONS!



Q11: Now using a scale from 1 to 10, this time where 1 means not *healthy* at all and 10 means extremely *healthy*, please rate the following nuts.

SOURCE: 2017 France Consumer AAU

AND...FOR THE 1st TIME EVER, ALMONDS HAVE SURPASSED WALNUTS & PEANUTS, NOW BEING THE #1 NUT WHEN THINKING ABOUT A **SNACK** (28%)!



Q2: Now, think for a moment about nuts as a **snack** (i.e. a food eaten between meals or instead of a meal), as a whole nut. When you think about eating whole nuts by themselves apart from a meal, what one type of nut **FIRST** comes to mind?

I live a balanced, healthy life and approach food with an "everything in moderation" mentality.

I'm concerned about environmental issues and the impact I can have on the planet.

FR JANE



ROUTINE SNACKERS



CULINARY-INCLINED



HEALTH-EMPOWERED



PURCHASE POWER



SOCIAL AT HOME



SELF-CARE

I need snacks that are natural, unprocessed, and can keep me satisfied in between meals.

MEDIA COVERAGE



AUJOURD'HUI C'EST DEVENU L'ALIMENT À LA MODE

L'ŒIL DU MONDE

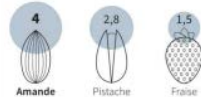
L'amande, reine de Californie

En l'espace de dix ans, la « Central Valley » a doublé la surface de ses vergers pour produire le fruit à coque. En apportant près de 80% des volumes vendus sur la planète, elle écrase toute concurrence

Une culture trop gourmande

En eau

QUANTITÉ D'EAU NÉCESSAIRE POUR QUE LE FRUIT ARRIVE À MATURITÉ, EN LITRES



10% de l'eau consommée par l'agriculture en Californie est destinée à l'amande

En abeilles

NOMBRE D'ABEILLES NÉCESSAIRES POUR POLLINISER UN HECTARE D'AMANDIERS

300 000



Les producteurs californiens ne trouvent plus assez d'insectes sur place pour polliniser leurs centaines de milliers d'hectares. Ils louent désormais des abeilles en dehors des États-Unis (certaines viennent d'Australie) pendant la saison de pollinisation.

Le Monde

MONDE

EN FÉVRIER A LIEU LA POLLINISATION DES AMANDIERS DE CALIFORNIE

Des milliards d'abeilles à louer

Pour réussir à fertiliser l'ensemble de ses amandiers, la Californie, qui produit 80% des amandes mondiales, est obligée de faire venir des abeilles des quatre coins du pays.



Les ruches d'abeilles louées pour la pollinisation des amandiers en Californie. Ici, elles sont 80 millions.

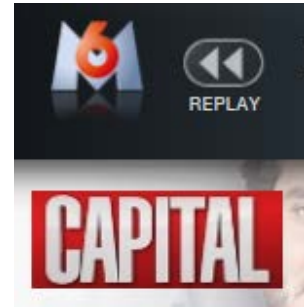
Certaines abeilles sont envoyées dans des ruches louées pour la pollinisation des amandiers en Californie. Ici, elles sont 80 millions.

En février, pendant quinze jours, 90 millions d'amandiers fleurissent

La production mondiale d'amandes est en constante augmentation. En 2015, elle a atteint 1,8 million de tonnes, contre 1,5 million en 2010. La Californie, qui produit 80% des amandes mondiales, est obligée de faire venir des abeilles des quatre coins du pays pour réussir à fertiliser l'ensemble de ses amandiers. En février, pendant quinze jours, 90 millions d'amandiers fleurissent en Californie. Les producteurs californiens louent des abeilles des quatre coins du monde pour réussir à fertiliser l'ensemble de leurs amandiers. En février, pendant quinze jours, 90 millions d'amandiers fleurissent en Californie. Les producteurs californiens louent des abeilles des quatre coins du monde pour réussir à fertiliser l'ensemble de leurs amandiers.

L'amande : super aliment ou super business ?

C'est une sacrée réhabilitation : il y a quelques années encore, grignoter des amandes, c'était un péché gourmand... trop gras, bourré de calories ! Aujourd'hui, miracle, cette graine s'impose comme l'un des symboles de la nutrition saine, riche en antioxydants, et même anticholestérol. Derrière ce retour en grâce, l'œuvre d'un collectif très puissant : les producteurs d'amandes californiens ; 85% de la production mondiale à eux seuls. À coups de études scientifiques et de marketing très efficace, ils ont réussi à transformer l'image de l'amande pour en faire un super aliment à la mode, faisant exploser les prix par trois en 10 ans. Dans leur sillage, industriels comme stars du snacking sain jusqu'à l'historique Maître Prunelle, se sont fait les rois des pruneaux, en profitant pour décliner l'amande à toutes les sauces. Enquête sur un super aliment... devenu aussi un business en or.





WHAT WE'RE DOING

TOP 3 OPPORTUNITIES IN FRANCE

1 Capitalize on momentum and explore growth opportunities

2 Educate on evidence around calories and fat and benefits of eating 28g

3 Tell our sustainability story even more proactively

GERMANY GROWTH OPPORTUNITY



...2008

2009

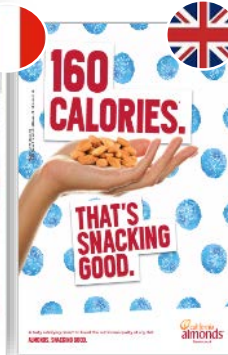
2011

2013

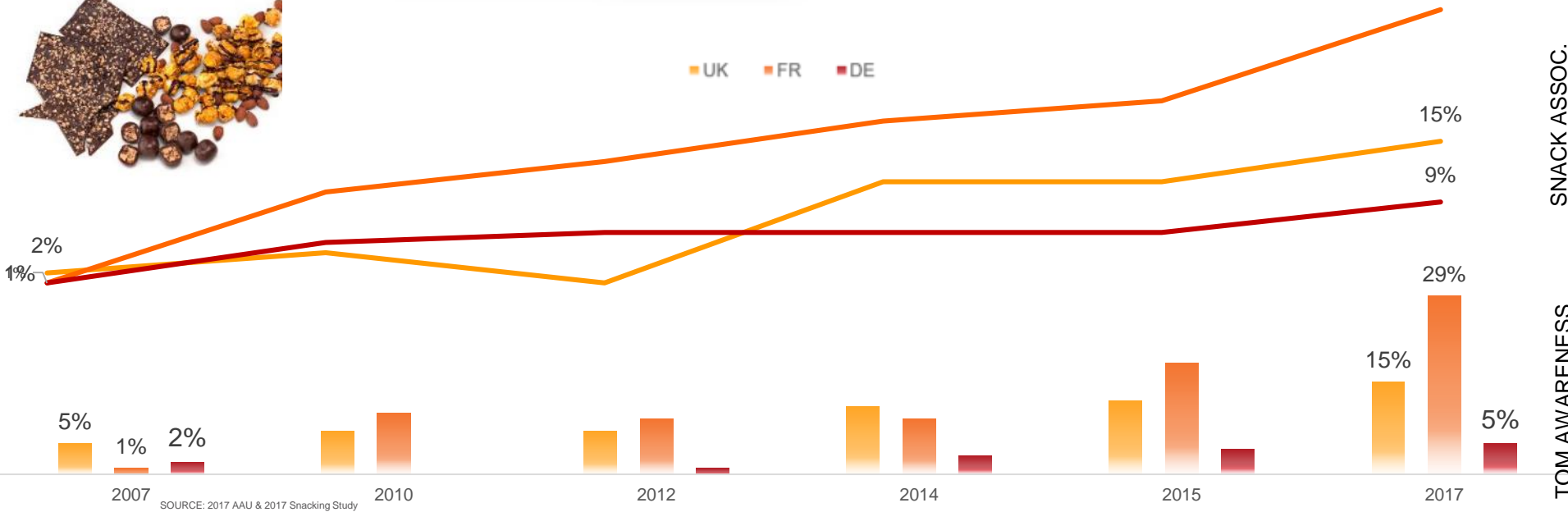
2015

2016

2017



■ UK ■ FR ■ DE

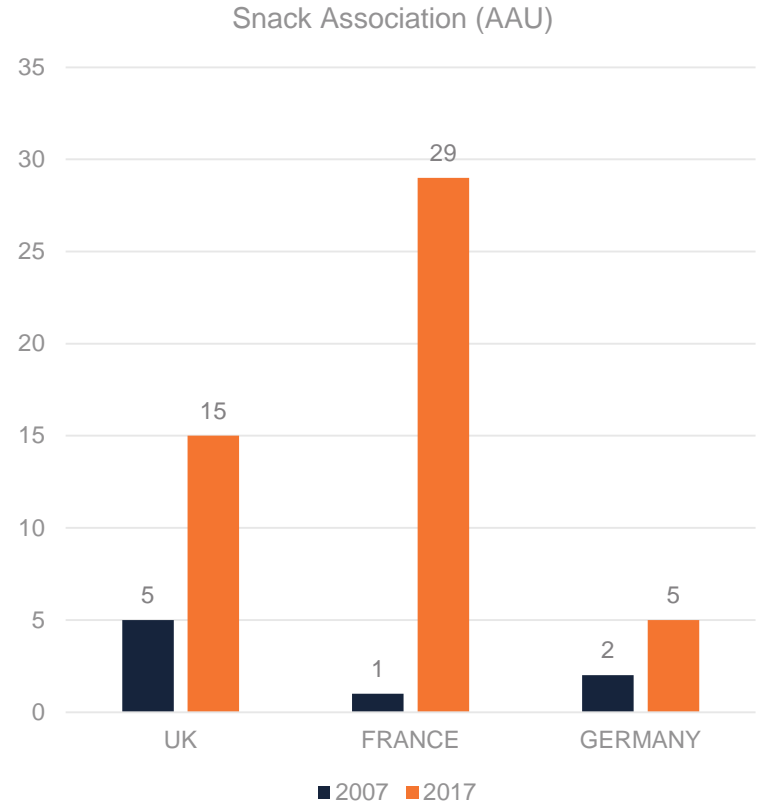
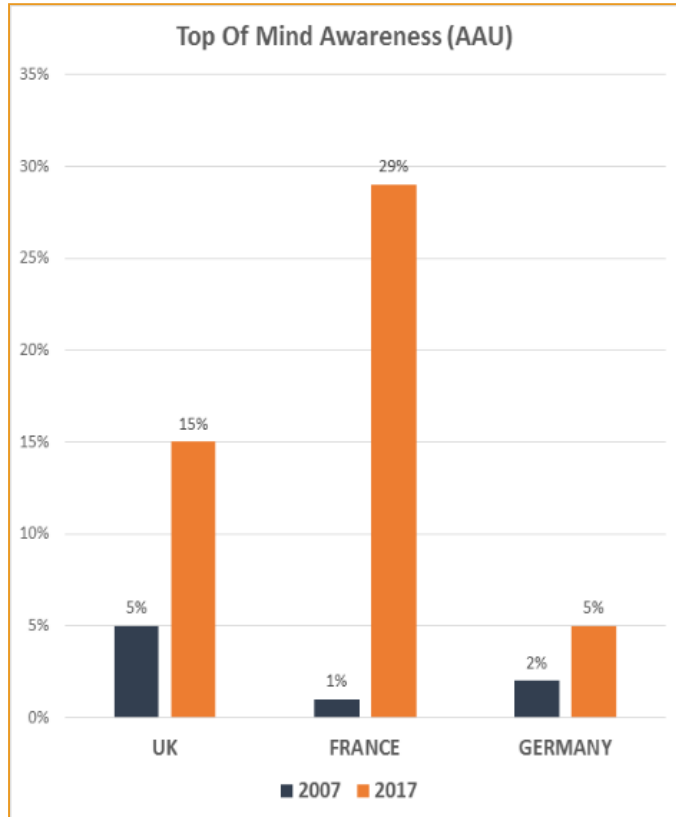


SNACK ASSOC.

TOM AWARENESS

SOURCE: 2017 AAU & 2017 Snacking Study

RESULT OF THE LONG-TERM SNACKING STRATEGY





QUIZ TIME!

TIME!

QUIZ

ALMONDS ASSOCIATION WITH
SNACKING IS LOW.

BUT ASSOCIATION WITH ___ IS
VERY HIGH

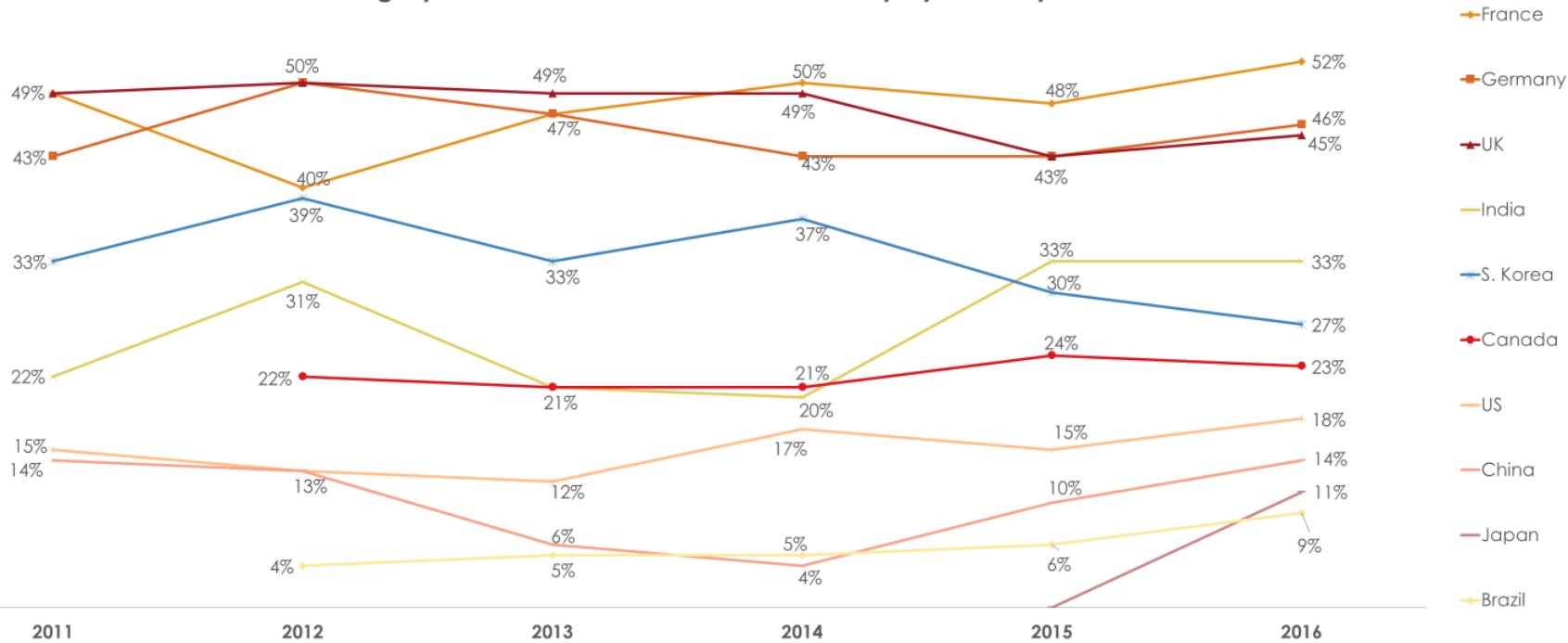
ANSWER

BAKING

ALMONDS ARE STRONGLY
ASSOCIATED WITH BAKERY
IN GERMANY

BAKING ASSOCIATION

Category Association with Almonds: Bakery By Country



Q1: When you think of nuts, which nuts come to mind? (Open-end)

SOURCE: 2017 Germany Consumer AAU

TIME!

QUIZ

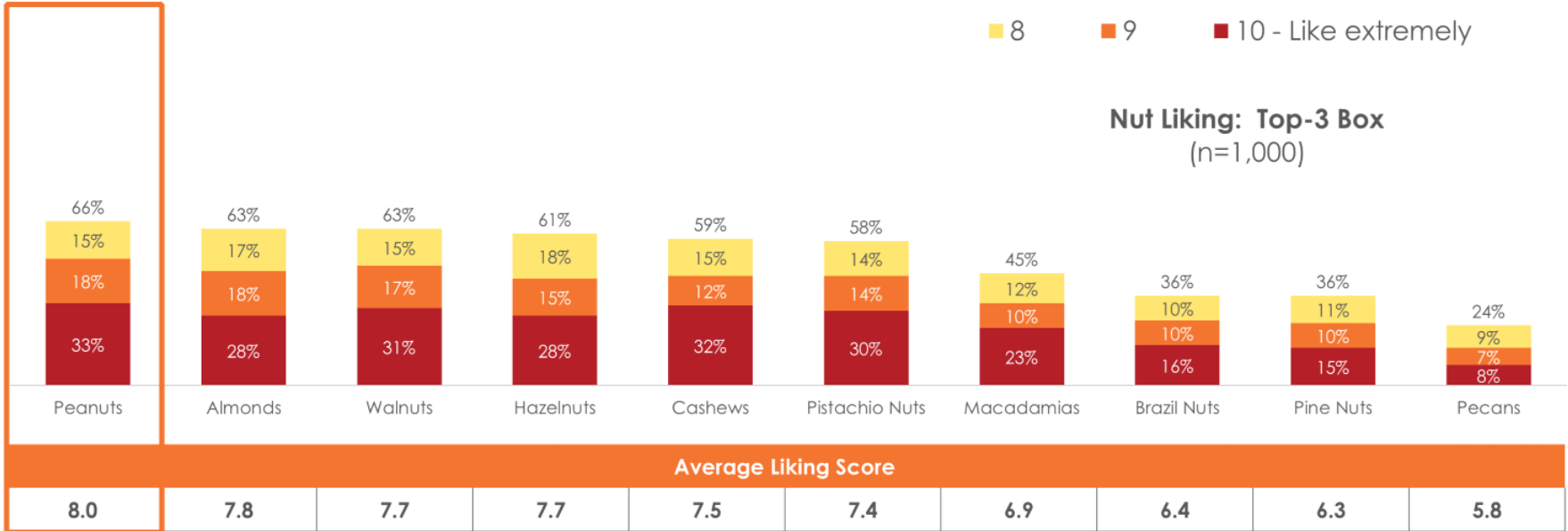
ALMONDS ARE THE 2ND BEST
LIKED NUT IN GERMANY.
WHAT NUT IS #1?

ANSWER

PEANUTS

ALMONDS HAVE THE 2nd
HIGHEST LIKING SCORE BEHIND
#1 PEANUTS – AND AHEAD OF
WALNUTS AND HAZELNUTS

NUT LIKING



Q16: Using a scale from 1 to 10, where 1 means you don't like them at all and 10 means you like them extremely well, please rate each of the following nuts

SOURCE: 2017 Germany Consumer AAU

TIME!
QUIZ

ALMONDS ARE RANKED #2 FOR
HEALTHFULNESS IN GERMANY.
WHAT NUT IS #1?

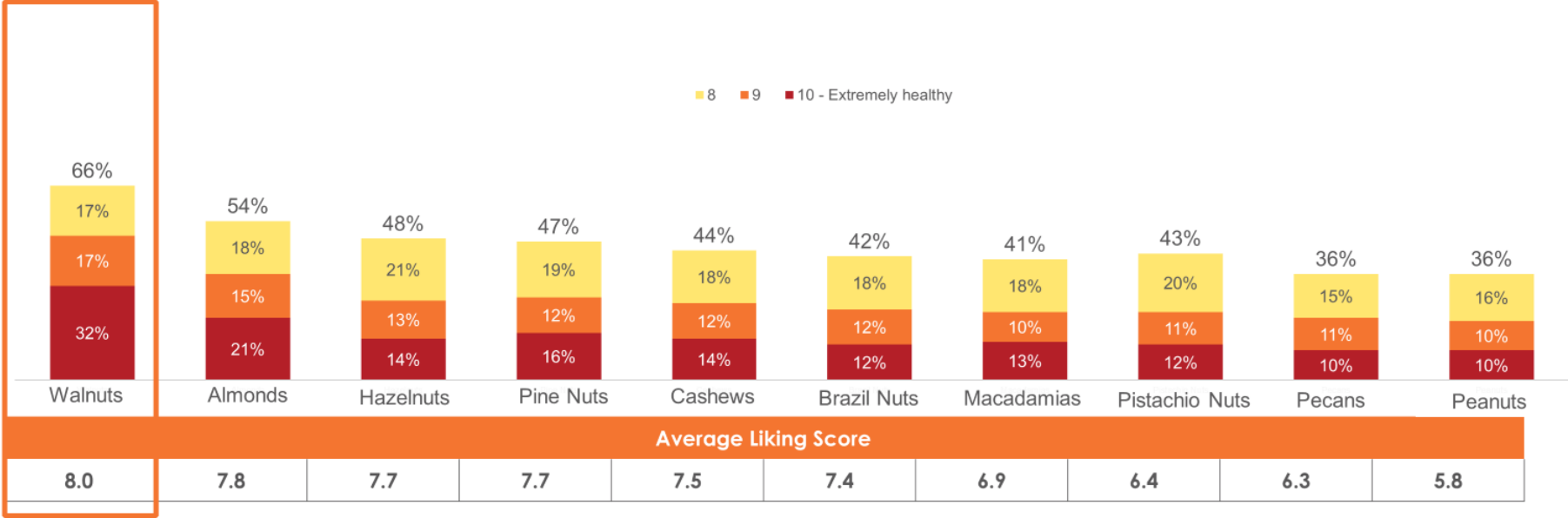
ANSWER

WALNUTS

WALNUTS ARE VIEWED AS THE
HEALTHIEST NUT IN GERMANY.
WITH ALMONDS AND HAZELNUTS
TIED FOR 2ND PLACE

NUT HEALTHFULNESS

Nut Healthfulness: Top-3 Box
(n=1,000)



Q17: Now using a scale from 1 to 10, this time where 1 means not *healthy* at all and 10 means extremely *healthy*, please rate each of the following nuts.

TIME TO INVEST IN GERMANY

THE CHALLENGE AHEAD IS TO CHANGE THE
PERCEPTION OF ALMONDS FROM A BAKING INGREDIENT
INTO A HEALTHY, MID-DAY SNACK



AND BUILD ON POSITIVE PERCEPTIONS OF ALMONDS



2016 IRI + IRI CATEGORY DEEP DIVE

PRELIMINARY/INFORMATIONAL CAMPAIGN LAUNCH

IN-MARKET QUALITATIVE RESEARCH & MESSAGE TESTING

2015 AAU STUDY 2016 GLOBAL PERCEPTIONS

2015 IRI SALES ANALYSIS 2016-17 WE LEARNED...2017-18 WE IMPLEMENTED!

2015 GLOBAL PERCEPTIONS

GERMANY SNACKING LANDSCAPE STUDY

TARGET AUDIENCE DEVELOPMENT

CREATIVE BRIEF & CAMPAIGN KICK-OFF

CAMPAIGN CONCEPTING, TESTING AND DEVELOPMENT

2017 AAU STUDY

FULL ADVERTISING LAUNCH

CONSUMER SEGMENTATION STUDY

Snacking is a key part of my diet and something I look forward to.
Snacks be tasty, but also provide energy and be healthy.

THE DE-LIGHTFUL SNACKER



ROUTINE SNACKERS



FOOD IS ASPIRATIONAL



REDUCED CALORIE FOCUS



INCOME



ALWAYS ON



LIVING WITH

Most of the snacks for in-between that are tasty and high in energy make me feel heavy and weighed down.

Snacking is a key part of my diet and something I look forward to. Snacks be tasty, but also provide energy and be healthy.

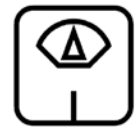
Almonds are a **delightful** mid-day snack—naturally **rich**, but **light** and easy to eat everyday.



ROUTINE SNACKERS



FOOD IS ASPIRATIONAL



REDUCED CALORIE FOCUS

THE **DE**-LIGHTFUL SNACKER



INCOME



ALWAYS ON



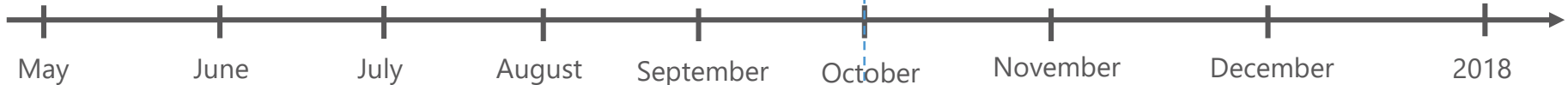
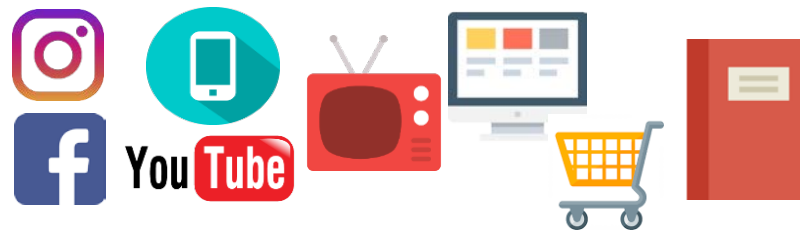
LIVING WITH

Most of the snacks for in-between that are tasty and high in energy make me feel heavy and weighed down.

Campaign Timeline & Results

Preliminary Campaign Launch:
May 2017

Full Campaign Launch:
October 1, 2017



- 115+ ASSETS
 - 191 million impressions
 - 6,144% increase in followers on Instagram





WHAT WE'RE DOING

TOP 3 OPPORTUNITIES IN GERMANY



1

Invest to raise awareness

2

Focus communications on the mid-day snacking occasion and the balance of “rich & light”

3

Get the trade on-board so product on shelf reflects positioning and inspires purchase



But Wait...
**There's
MORE!**



THE EU3 IS NOW...

THE EU4



ITALY

coming soon...



Dariela Roffe-Rackind
droffe@almondboard.com



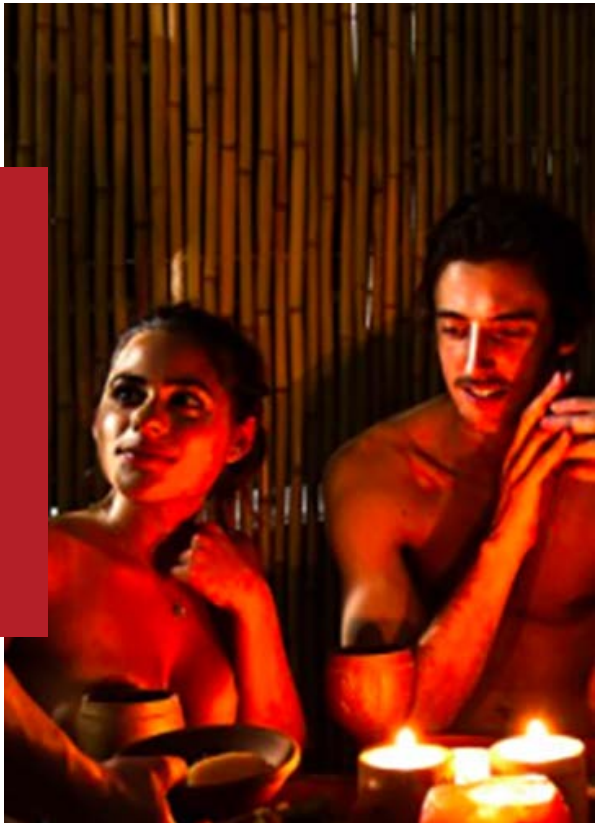
THE FUTURE OF FOOD



Kathryn Martino
Director, Food & Nutrition, Porter Novelli
London

STRIPPING DOWN





THE WORLD'S FIRST NAKED RESTAURANT: LONDON



SLAUGHTERHOUSE CCTV
THE LAW IN FRANCE



SNAPCHAT STORIES PROVE
FISH IS 24-HOURS FRESH



CREATIVE
SUSTAINABILITY



THE GRAND BEEDAPEST HOTEL: WORLD'S FIRST HOTEL FOR BEES



"ZILLA EGGS"

A low-angle shot of a diverse crowd of people at an outdoor event, likely a festival or concert. Many individuals have their arms raised, some reaching towards the center of the frame. The background is a clear, bright blue sky. The overall mood is energetic and communal. A white rectangular border is superimposed over the center of the image, framing the text.

HEALTHONISM



NUT BUTTER FONDUE

WORKOUT BILLBOARDS



POWERADE
DU HAST MEHR POWER. ALS DU DENKST.

The billboard features a man in a light blue shirt and dark trousers climbing a virtual rock wall. The wall is black with colorful handholds in red, blue, yellow, and orange. The man is seen from behind, reaching up to grab a blue handhold. The billboard is set outdoors in a park-like area with trees and a building in the background. A group of people, including a woman with blonde hair and a man in a dark jacket, are watching the billboard. A red horizontal line is visible at the top of the image.

A close-up photograph of a person's legs from the knees down, wearing bright orange and blue athletic sneakers. The person is standing on a set of concrete steps. The image is framed by a white border, and the text "HACKING HUMANS" is overlaid in the center in a white, sans-serif font.

HACKING HUMANS



MONARCH AIRLINE'S IN-FLIGHT 'MOOD FOOD'

CHOCOLATE THAT IMPROVES GUT HEALTH



WHAT DOES THIS MEAN FOR ALMONDS?



Almonds = 100% natural

STRIPPED DOWN



Opening up the orchards



23 Servings of Sustainability

CREATIVE SUSTAINABILITY



Almond by-product snack bar



Snacking Good!

HEALTHONISM



Almonds + chocolate = health halo



The most researched nut

HACKING HUMANS



An even more super superfood



Kathryn Martino

Kathryn.martino@porternovelli.co.uk

Thank you!





Use **#AlmondConf** to
be part of the
conversation on
Facebook and
Twitter

What's Next

Almond Stage Presentation at 3:00 p.m.

- How Important is the Quality of Data from In-Field Sensors in Making Accurate Navel Orangeworm Treatment Decisions in Almonds?, presented by Semios



Almond Stage Presentation at 3:30 p.m.

- Navigate Your Utility Bill, presented by Coldwell Solar



3:00 p.m. – 5:00 p.m. Coffee Break is sponsored by Actagro

