



Creating Consumer Demand Around the World

Mark Masten, Moderator





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Research Update

Turn in your **2010 Research Update** ticket at the ABC booth (#143) in the Exhibit Tent for the 2010 Research Update.





Creating Consumer Demand Around the World

Moderator:

Mark Masten, Paramount Farms

Presenters:

Maggie Jiang, Hill and Knowlton China

Stacey Humble, ABC

Dariela Roffe-Rackind, ABC

Becky Sereno, ABC



Capturing the Hearts and Minds of China's New Consumers

Maggie Jiang, Hill and Knowlton China





Today



China Overview

China's NEW Consumers

New Consumers & Almonds

**Almond Board China Consumer Marketing
Program Overview**



China Overview



China by the Numbers

World's Second Largest Economy (by PPP)

- **GDP Growth**

2007:	11.9%
2008:	9.0%
2009:	9.1%
2010:	10% (forecast)

- **Per Capita GDP**

World Bank:	\$6,838
CIA:	\$6,600
IMF:	\$6,778

Unemployment: 4.2% officially in urban areas, but including migrants may be as high as 9%



The Middle Kingdom

Main population centers in the North, East and South are driving growth

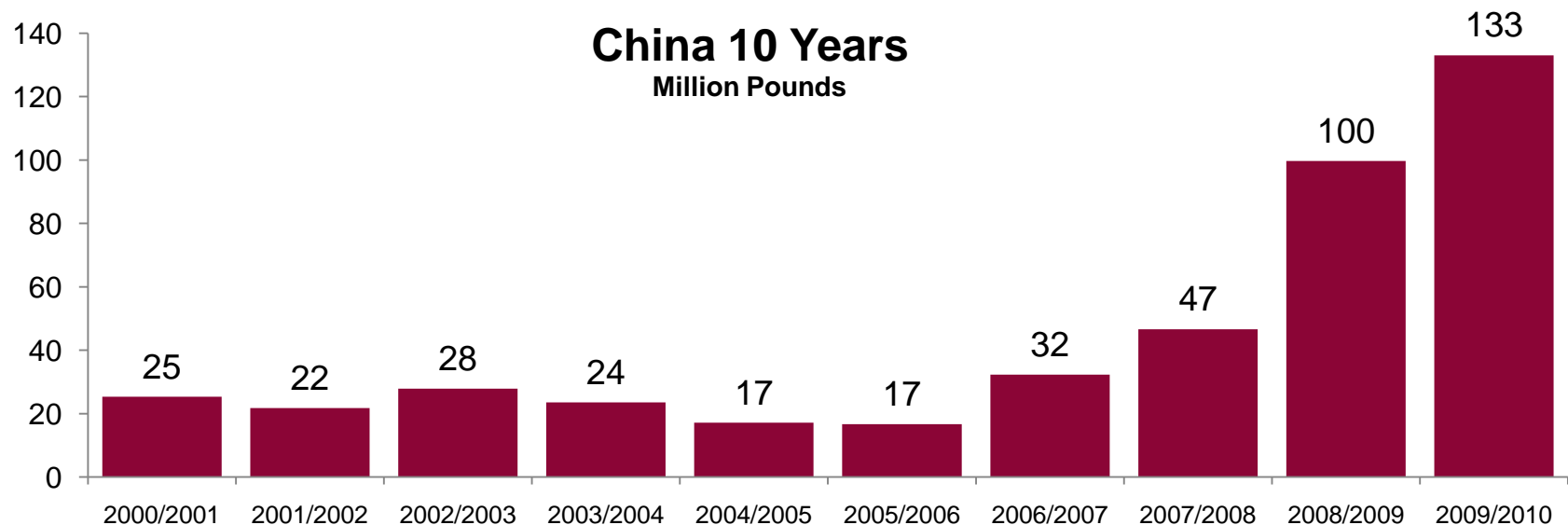




Almond Exports to China

California Almond exports over the past couple years have increased leaps and bounds

End of FY 09/10 China was the 2nd largest export market for California Almonds





China's NEW Consumer



Change Driver #1: Urban Growth



Urban Migration: The largest migration in human history

- **More than 210 million people have moved to the cities**
- **At least 1.5 percent rural to urban migration annually**
- **Migrant labor is expected to increase to 300 million by 2020**
- **Urbanization to reach 55 percent by 2020**
- **More urban poor, less rural labor, “urbanization in place”**

Why: Enormous difference in urban-rural incomes & reduction in internal controls



Change Driver #2: Aging Population

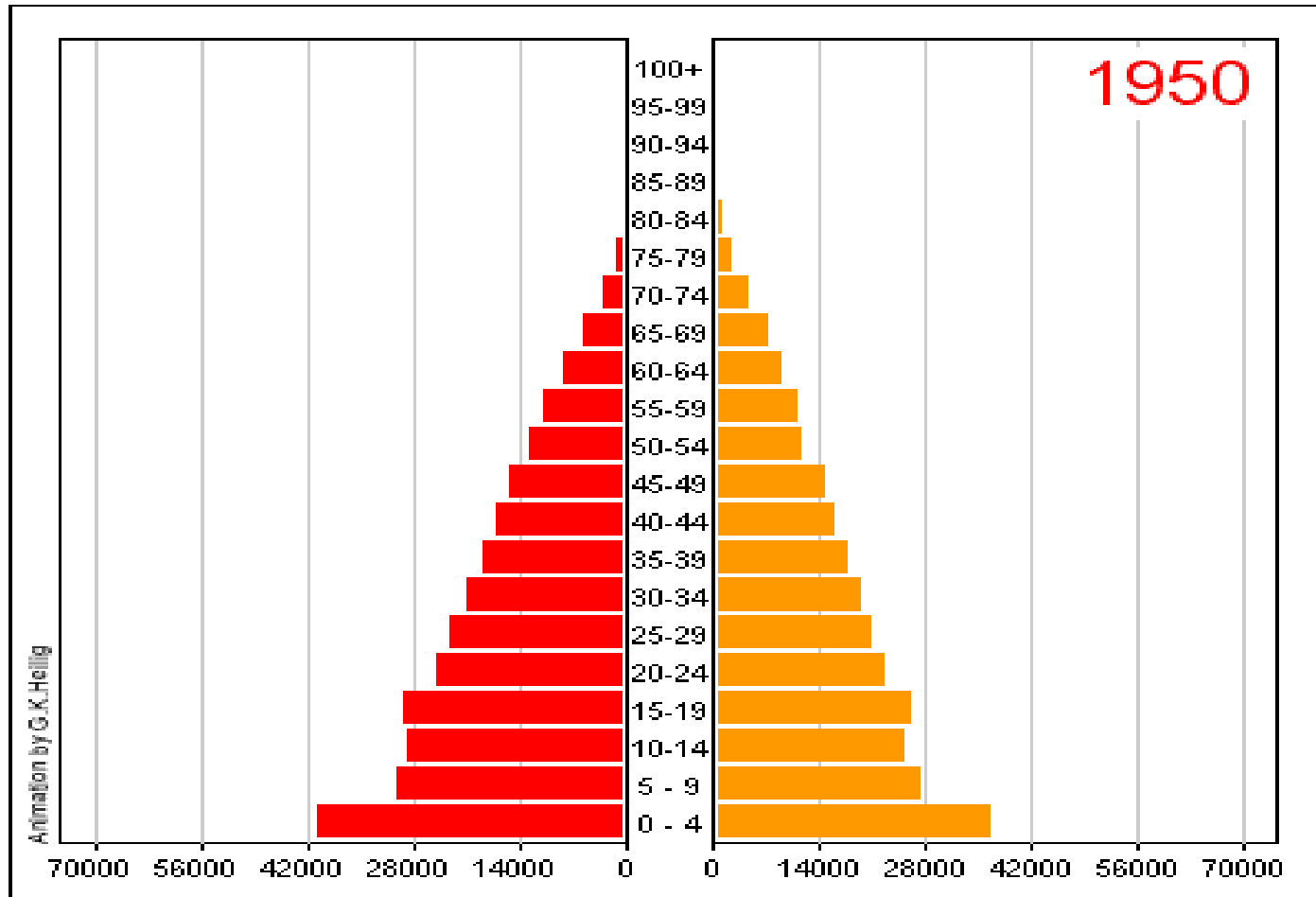
China's Population is aging rapidly

- Elderly will increase from 167 million (13 percent) in 2010 to 300 million (31 percent) in 2050
- Increasing number of “empty nesters”

Why: Effect of one-child policy since 1979



China grows old as it grows richer...





Change Driver # 3: New Middle Class



China's population is entering the middle class

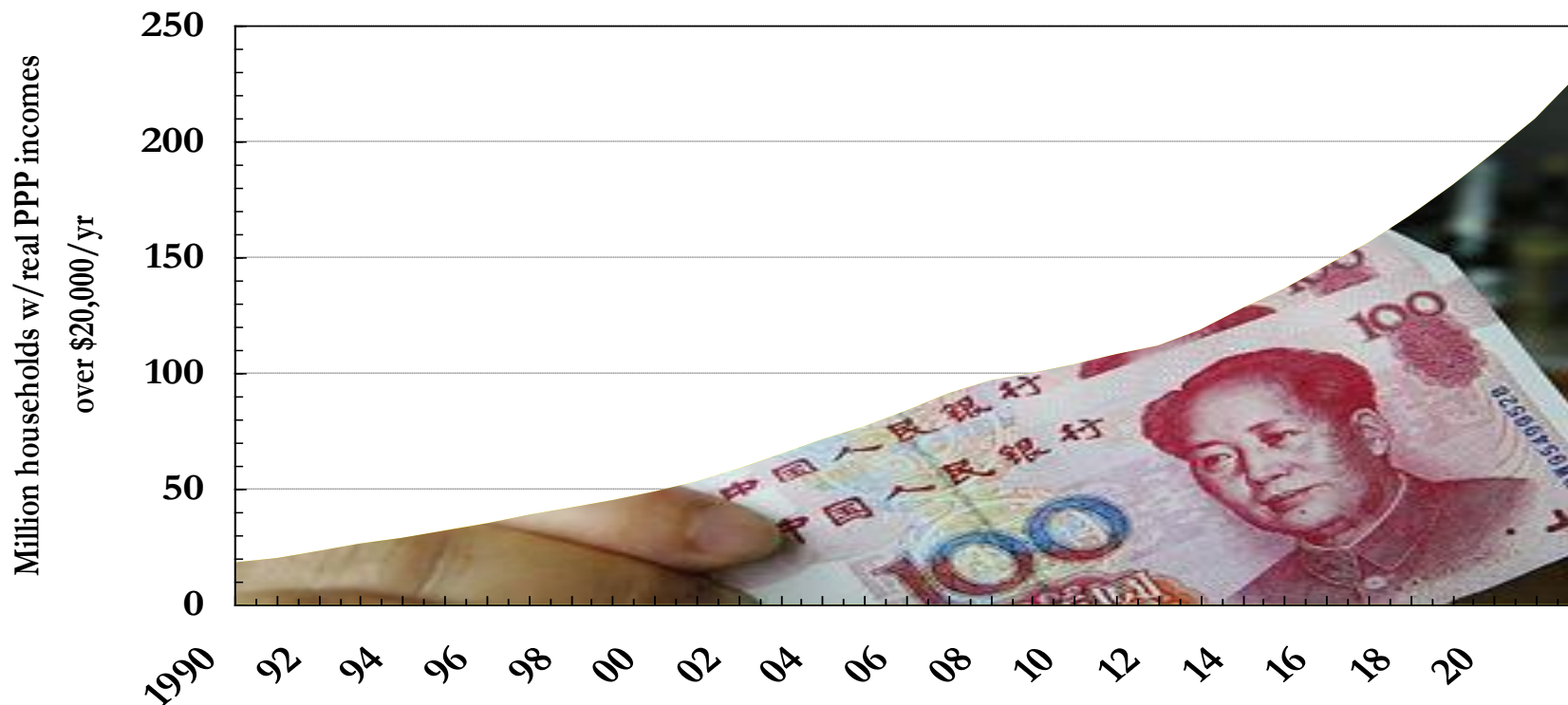
- **Currently around 100 to 150 million people**
- **Expected to be reach 300 million by 2015**
- **Annual wage growth of 10-15 percent likely to continue**
- **Government policy of a "well-to-do society" by 2020**
- **Poverty to fall from 77 percent in 2005 to 15 percent in 2020**

Why: Thirty years of 8-12 percent growth



A New Middle Class Society

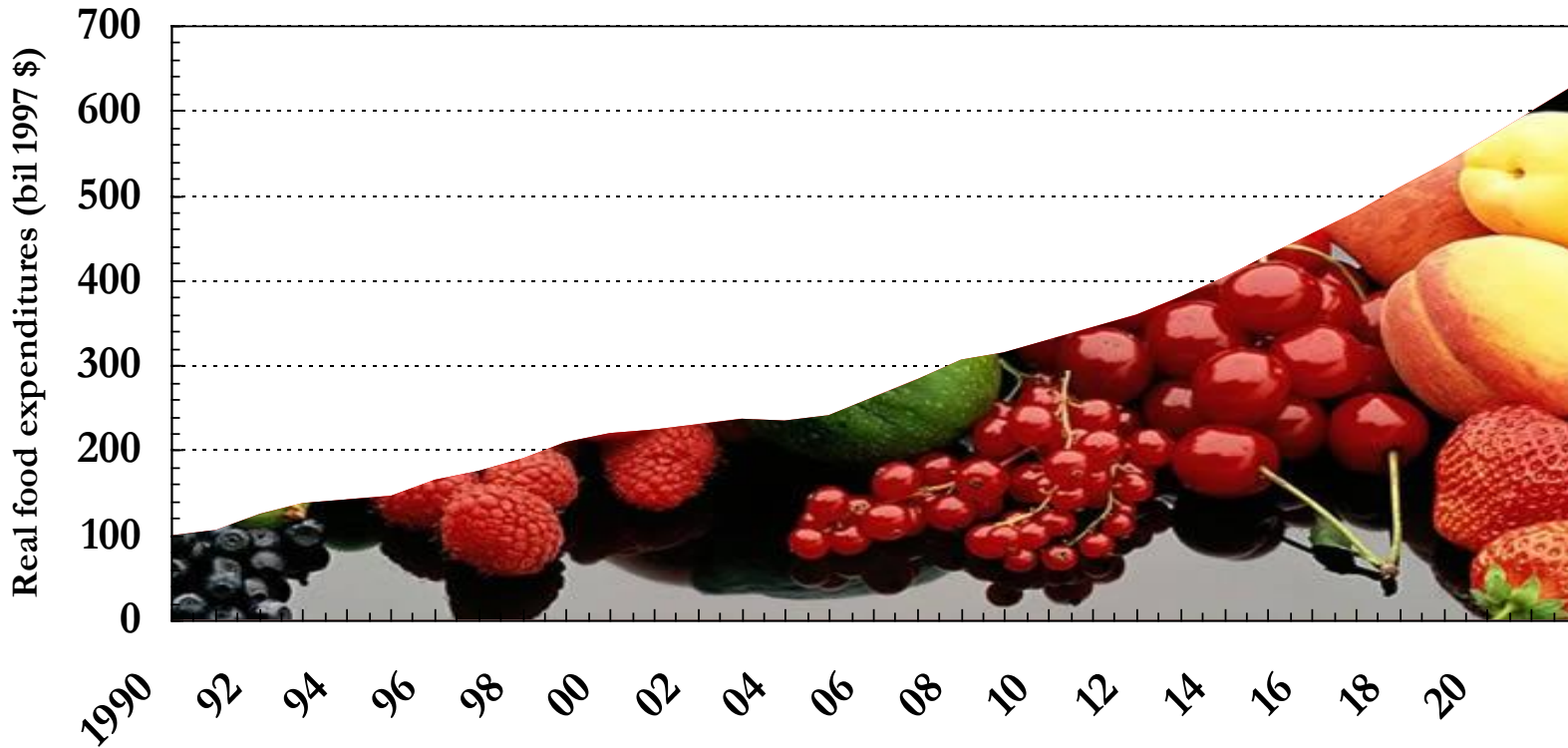
The rising middle class...





A New Middle Class Society

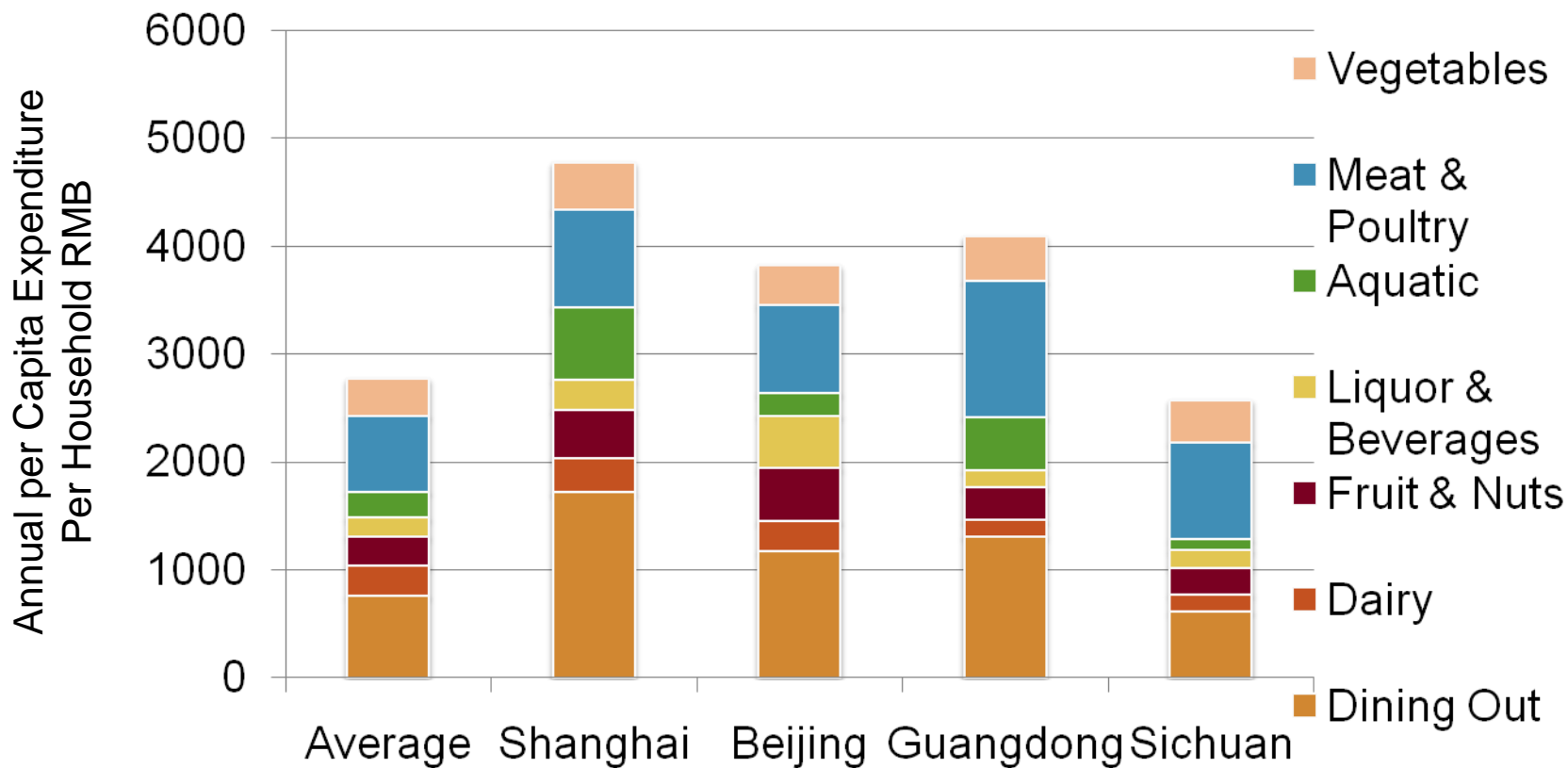
...with more to spend on food





A New Middle Class Society

Where they are spending on food...





Primary Target Amongst “New” Consumers: Working Women

Upwardly mobile, young women working “white collar” office jobs in big cities are prime consumers with disposable income and penchant to be on-trend

Meet Jing!





Jing Insights

Family-oriented, trying to keep a harmonious and happy family

- Family members are the center of their lives
- And as a mother, her kid is the most important person in her life
- To take good care of the family, and to make the whole family healthy are their upmost concerns.

Health-conscious with key interests at different stages of life

Brand conscious & in pursuit of quality life; Want to be perceived as a tasteful & trendy woman

Feel stress because of “double pressure”:

- Tough competition at work
- Family responsibilities

A good relationship with friends is also important for them

- Going Shopping, chatting and dining out are popular ways of spending time with friends
- Enjoying personal life is also essential in their life



Jing and Almonds



Data collection method

- Face-to-face interviewing at central locations with respondents recruited via street intercept

Sample size

- 250 per city and total sample size is 1250

Respondent criteria:

- Decision maker of household grocery purchase
- Aged 18 to 54
- Gender: 70% female vs. 30% male
- Medium or high household income level

Fieldwork conducted: July 2009

12 focus group sessions conducted in March 2010 in Beijing, Shanghai and Guangzhou

City coverage

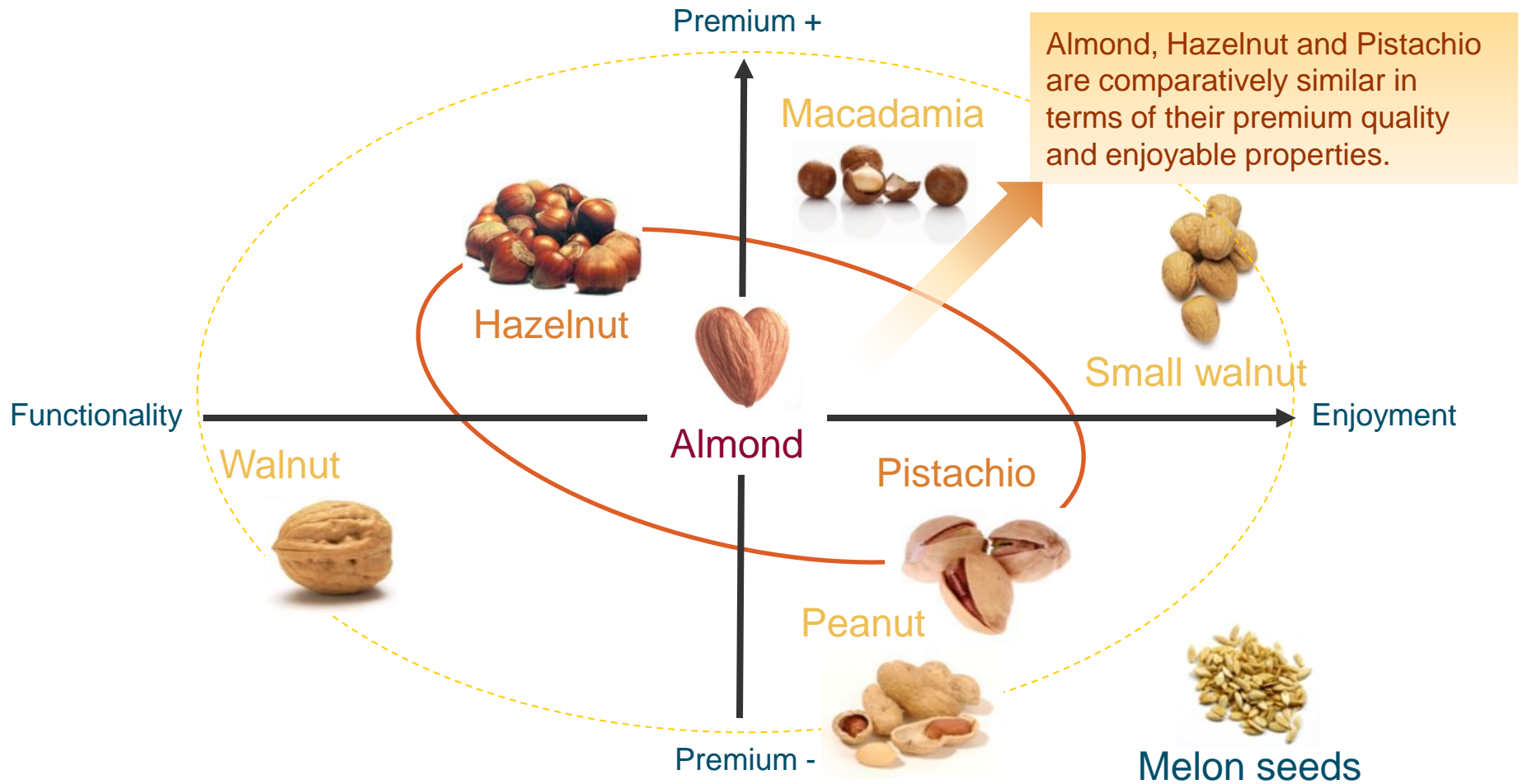
■ Tier 1 City

■ Tier 2 City





Mapping of Different Nuts





Almonds, Hazels and Pistachios



California
Almond

- Sweet after taste
- High convenience to eat
- High nutrition compared with others
 - Unsaturated fatty acid
 - Dietary fibre
- Stronger functions compared with other nuts
 - Whitening
 - Good for heart disease
 - Keep fit



Pistachio

- The Chinese name of Pistachio is auspicious
- Its crispy mouth feel is liked by the most

VS.



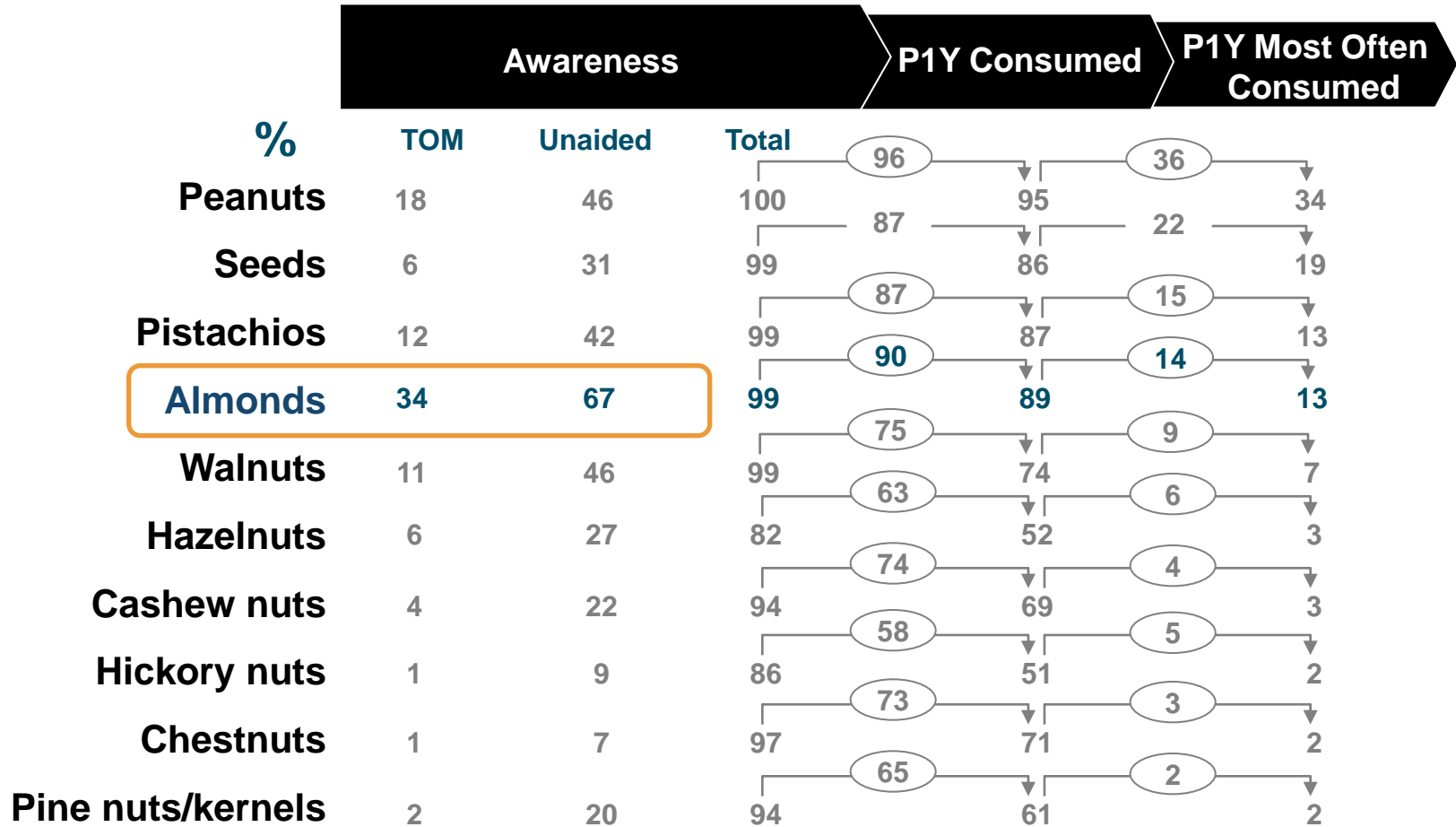
Hazelnut

- The taste of Hazel nut is perceived to have better aroma
- However, it is perceived to be too oily to eat much



Awareness of Almonds is Very High; Frequent Consumption is Fairly Low

○ Conversion rate
(the rate between the later figure and the prior figure)





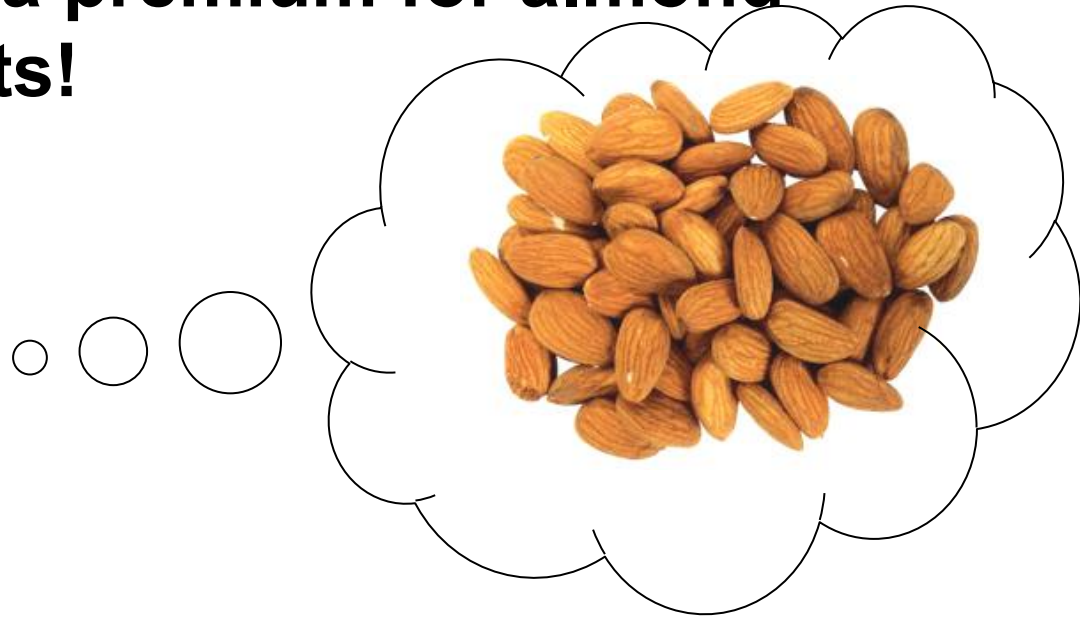
The World of California Almonds





Strong Consumer Preference for Almonds

- **88% prefer almond containing products to similar non-almond products**
- **85% willing to pay a premium for almond-containing products!**



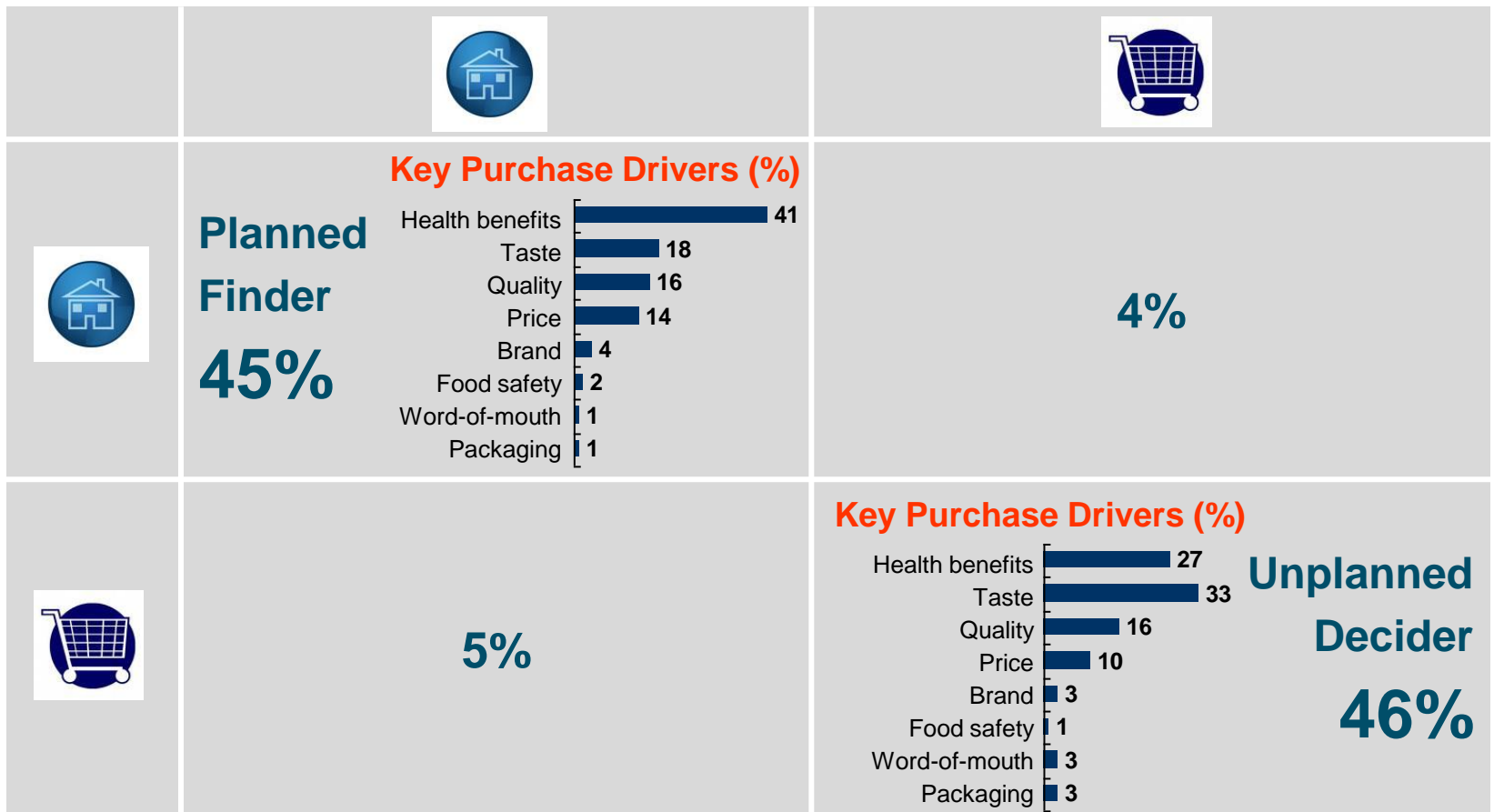


Almond Purchase Behavior

Planned finders primarily driven by health benefits while impulsive buyers driven by taste more

When to Decide Buying Nuts

When to Decide Buying American Almonds





Almond Board China Consumer Marketing Program Overview



Strategic Approach to Reach Jings

Objective

- Increase year round almond consumption by target consumers and her family: “a handful of almonds for Jings every day”

Desired Behavior

- Make almonds central and essential to their daily snacking habits
- Share almonds with family and friends

Communications Strategy

- Build loyal consumer demand for almonds as an aspirational, healthy snack through a unified and targeted snack campaign



Holistic Program with Multiple Touch Points for Jing

Integrated Marketing Event

- Call consumer to action, more direct consumer interaction
- Attend 2 integrated marketing event (welcoming festival and office lady challenge)
- Arrange media interviews and have ambassador endorsements to reinforce almonds messages

California Experiential Tour

- Gao Yuan Yuan tours almond orchards in California with 2 television crews and photographer
- Use coverage on TV shows and throughout rest of campaign

Digital Marketing

- Ambassador endorsement and PR photo usage on BBS and blog posts
- Ambassador micro-blog

Use Ambassador Image and Quotes

- Use her image and quotes and apply to different communication channels
- Use her image in communication activities and in-store promotion

Engage Celebrity Ambassador Gao Yuan Yuan for a second year

Media Events

- Attend media events in BJ and SH
- Arrange media interviews and have ambassador endorsements to reinforce almond messages

Media Partnerships

- Print media in-depth interviews and cover stories
- Interviews on TV partnerships
- Ambassador endorsements to enrich partnership content





Almond Board Website in China



www.meiguoxingren.com.cn



健康生活方式

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学生创意大赛



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Thank You



Creating Healthy Demand for Almonds in the U.S.

Stacey Humble, Almond Board of California





U.S. Overview



- **U.S. Market**
- **U.S. Research Investment**
- **U.S. Almond Usage Assessment**
- **Understanding Core Target Audience – Jane**
 - *Attitudes about Nuts and Almonds*
- **U.S. Outlook on Growth**
- **Almond Board North American Marketing Program Overview**



The United States Market is critical to meeting overall global supply for a variety of reasons:

- **Accounted for 34% of crop in 2009**
- Investment in core target, Jane, has driven growth and additional targets are growing
- Programs are measurable and the quality and frequency of market research provides significant insights to industry and staff
- Programs are leveraged around the world:
 - Trade
 - Consumer
 - Research
 - Health Professional and Nutrition program
- Concentration of global food manufacturers in U.S. allow for efficient global communication
- Critical to continue to invest and not fragment efforts in order to reach goal



Research Investment



U.S. Research Investment (FY 2009/10)



- **Ingredient Why: Healthy Men 2009**
 - *An online survey of 2,005 U.S. Healthy Men to identify ideal components of products in important almond categories, assess preference for almonds versus other ingredients options and understand the key benefits of almonds as an ingredient*
- **NA Breakfast Outlook 2009**
 - *An online survey of 2,001 U.S. and 400 Canadian consumers examining the breakfast landscape, assessing the current state of the cereal category and identifying opportunities for almonds at the breakfast occasion*
- **NA Consumer AAU 2009**
 - *An online survey of 1,503 U.S. and 501 Canadian consumers monitoring almond awareness, attitudes and usage*
- **NA Grocery Exploration 2009**
 - *A snapshot of North American consumers' food shopping behaviors, attitudes and purchase decisions*
- **U.S. Retail Product Movement 2009**
 - *An in-depth analysis of the 2008 calendar –year data using Information Resources, Inc., U.S.-checkout-scanner data to measure category growth, declines and price premiums for almond products*
- **U.S. Menu Insights 2009**
 - *A tracking study reporting the use of almonds in 549 U.S. chain, independent and chef-owned restaurants in Mintel's Menu Insights*



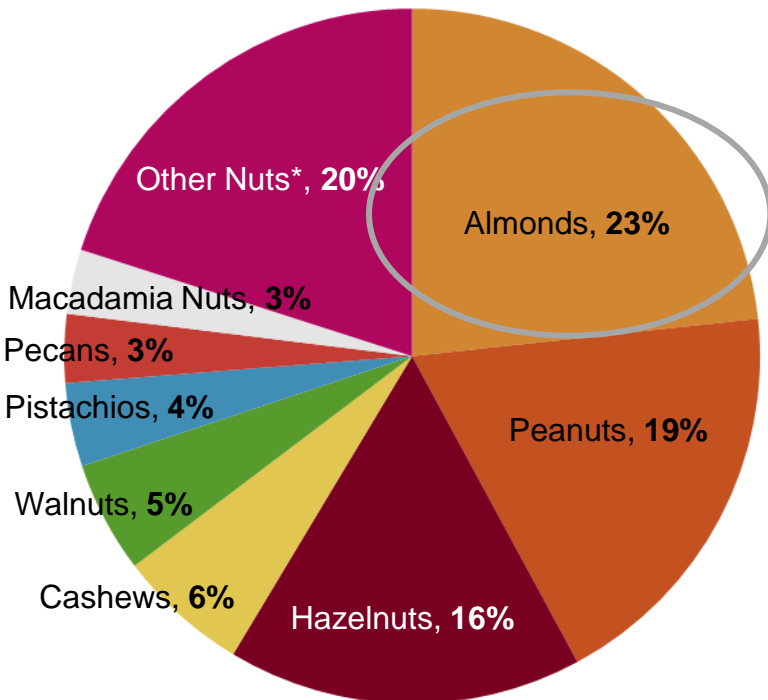
Nut Analysis: Share of Nut Introductions by Nut Type



For the second year, almonds are the number one nut introduced globally

- The gap between almonds and peanuts (number two nut) widened 2% points and almonds' share of new food and new nut introductions increased

2009 Share of Nut Introductions



Share of Food and Nut Introductions by Nut Type

Nut	2008			2009		
	# of Intros	Share of Food Intros	Share of Nut Intros**	# of Intros	Share of Food Intros	% of Nut Intros**
Almonds	1,544	2.22%	22%	1,819	2.27%	23%
Peanuts	1,374	1.98%	20%	1,472	1.84%	19%
Hazelnuts	1,120	1.61%	16%	1,288	1.61%	16%
Cashews	427	0.62%	6%	476	0.59%	6%
Walnuts	370	0.53%	5%	405	0.51%	5%
Pistachios	273	0.39%	4%	304	0.38%	4%
Pecans	283	0.41%	4%	249	0.31%	3%
Macadamia Nuts	160	0.23%	2%	235	0.29%	3%
Other Nuts*	1,439	2.07%	21%	1,566	1.96%	20%
Total**	6,990		100%	7,814		100%

*All other nuts include all products that contain nuts where no specific nut was identified, smaller nuts such as brazil nuts, and non-nuts such as pine and soy nuts.

**Share based on total nut mentions (base counts each nut mention for introductions with multiple nuts); therefore, share is understated.



Category Summaries: Estimated Almond Pounds

Despite growth in almond products across categories being less than 1% in 2009, estimated pounds of almonds sold increased 6%.

- Snacking continues to drive increases

Category	Almond Product Pounds		Percentage Change '08 to '09	<i>Estimated % Almonds*</i>	Estimated Almond Pounds		Percentage Change '08 to '09	Almond Pounds
	'08	'09			'08	'09		
Snack Nuts – Pure	44	55	25%	100%	44	55	25%	10.7
Snack Nuts – Mixed	57	56	-1%	12%	6.8	6.7	-1%	-0.1
Chocolate Candy	83	73	-11%	27%	22	20	-12%	-2.6
RTE Cereal	156	144	-8%	12%	19	17	-8%	-1.5
Ice Cream	106	124	17%	10%	11	12	17%	1.8
Frozen Novelties	31	29	-6%	15%	4.6	4.3	-7%	-0.3
Baking Nuts – Pure	10	9	-1%	100%	10	9	-1%	-0.1
Baking Nuts – Mixed	2.7	2.7	0%	12%	0.3	0.3	0%	0.0
Granola Bars	110	106	-4%	10%	11	11	-4%	-0.4
Energy Bars	19	22	14%	15%	2.8	3.2	14%	0.4
Cookies	3.8	4.3	14%	14%	0.5	0.6	20%	0.1
Biscotti	3.3	3.5	6%	7%	0.2	0.2	0%	0.0
TOTAL	624	628	0.6%		131	139	6%	8.1

*An average percentage of almonds included in products by category was created based on discussions with formulation experts.

Note: Volume in millions of pounds.



Category Summaries: Estimated Almond Pounds

It is estimated that 271 million pounds of almonds were sold through retail channels in 2009 (approximately 65% of domestic shipments).

- Over half (51%) of what is sold in retail is in the snack and baking nut categories

	Almond Product Pounds	Percentage Almonds*	Estimated Almond Pounds (IRI)	Category Coverage**	Total Estimated Almond Pounds	Share of Total Estimated Almond Pounds	
Snack Nuts – Pure	54.5	100%	54.5	51%	106.9	39.5%	} 44%
Snack Nuts – Mixed	56.3	12%	6.8	51%	13.2	4.9%	
Chocolate Candy	73.1	27%	19.7	29%	68.1	25.2%	
RTE Cereal	143.7	12%	17.2	77%	22.4	8.3%	
Ice Cream	123.8	10%	12.4	68%	18.2	6.7%	} 9%
Frozen Novelties	28.8	15%	4.3	82%	5.3	1.9%	
Baking Nuts – Pure	9.4	100%	9.4	51%	18.4	6.8%	} 7%
Baking Nuts – Mixed	2.7	12%	0.3	51%	0.6	0.2%	
Granola Bars	106	10%	10.6	88%	12	4.5%	} 6%
Energy Bars	21.6	15%	3.2	88%	3.7	1.4%	
Cookies	4.3	14%	0.6	52%	1.2	0.4%	} 1%
Biscotti	3.5	7%	0.2	52%	0.5	0.2%	
TOTAL	627.7		139.3		270.5		

*An average percentage of almonds included in products by category was created based on discussions with formulation experts.

**Based on Euromonitor category totals.



U.S. Target Audience

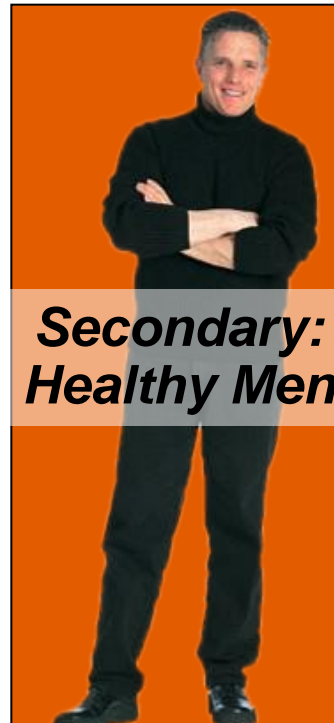


Consumer Target Audience

- **Our almond consumer target audience is defined as:**
 - United States “Appetite for Life” – 51% of the U.S. market



***U.S. women 35+
21% of the adult
population
46 million women***



***U.S. men
16% of the adult
population
35 million men***



***U.S. younger women
25–34
5% of the adult population
10.9 million***



Jane Profile

- 21% of the population can be classified as Jane. She contributes 26% of the almond occasions.
- Jane enjoys trying new grocery products and recommending them to her friends. But overall, she is not quite adventurous as other segments when it comes to food and restaurants – as she often choose health over bold and exciting flavors.
- Jane exercises regularly and watches her calorie intake and therefore most are successful at maintaining a healthy weight.
- Jane has a well defined understanding of the healthiness of almonds and gives them the highest health rating of any segment. Walnuts are also strong. Her usage of almonds is very high, but she still picks cashews as her favorite. When Jane eats nuts, they tend to be almonds
 - Although Jane’s weekly nut purchases are lower than any other group, her strong preference for almonds contributes to above average consumption of almonds



- Jane is a woman 35+, who is typically married
- 45% have kids at home
- 42% graduated college, and 57% earn more than \$50K annually. Her income is above average, but is not “high income”

Nut Usage	
Nut with highest weekly usage	Almonds 41%
% eating almonds weekly	41%
Favorite nut	Cashews 33%
% claiming almonds as favorite	26%

Attributes Most Strongly Associated with Almonds		Most Compelling Benefits of Almonds	
Natural	66%	Good for the heart	71%
Nutritious	64%	More nutrients	69%
Good tasting food	63%	Maintain healthy cholesterol	67%



Super Jane – Almond Consumption

- However, not all Janes are created equal
- Super Jane is the sub-segment of Janes who eats almonds on a weekly basis
 - 41% of Janes, are Super Janes
- Super Jane consumes almonds 5.5 times more often than regular Jane
 - 9% of the population are “Super Janes”, and they consume 22% of the almonds
 - Regular Janes comprise 12% of the population, but eat only 4% of the almonds

	Super Jane (n=365)	Regular Jane (n=522)
Percent of Total Population	9%	12%
Percent of Almond Consumption	22%	4%
Consumption Index	244	33



Attitudes about Nuts and Almonds

Attitudes: Attributes

Almonds continue to score well in comparison to other nuts as scores increased on nearly every attribute measure

Nut best described by the following...*							
(n=2,000)							
Attribute	Almonds	Cashews	Peanuts	Pistachios	Pecans	Walnuts	Don't Know
Versatile	23% (+2%)	6%	23%	4%	13%	19%	12%
Healthy	50% (+4%)	7%	6%	6%	5%	17%	10%
Indulgent	11% (+3%)	33%	7%	21%	13%	5%	11%
Balanced	33% (+4%)	9%	10%	6%	7%	14%	22%
Fresh	20% (+2%)	14%	13%	13%	10%	11%	19%
Energetic	26% (+4%)	9%	17%	9%	6%	9%	24%
Natural	30% (+5%)	8%	14%	9%	7%	17%	15%
Best Value	11% (+2%)	5%	57%	3%	4%	7%	14%
Satisfying	22% (+2%)	25%	16%	11%	8%	9%	9%
Sophisticated	17%	23%	4%	20%	15%	6%	16%
Nutritious*	47%	7%	8%	6%	5%	16%	10%
Best Tasting*	17%	35%	9%	15%	11%	6%	7%
Crunchy*	33%	11%	19%	8%	9%	12%	9%

*Added in 2010.

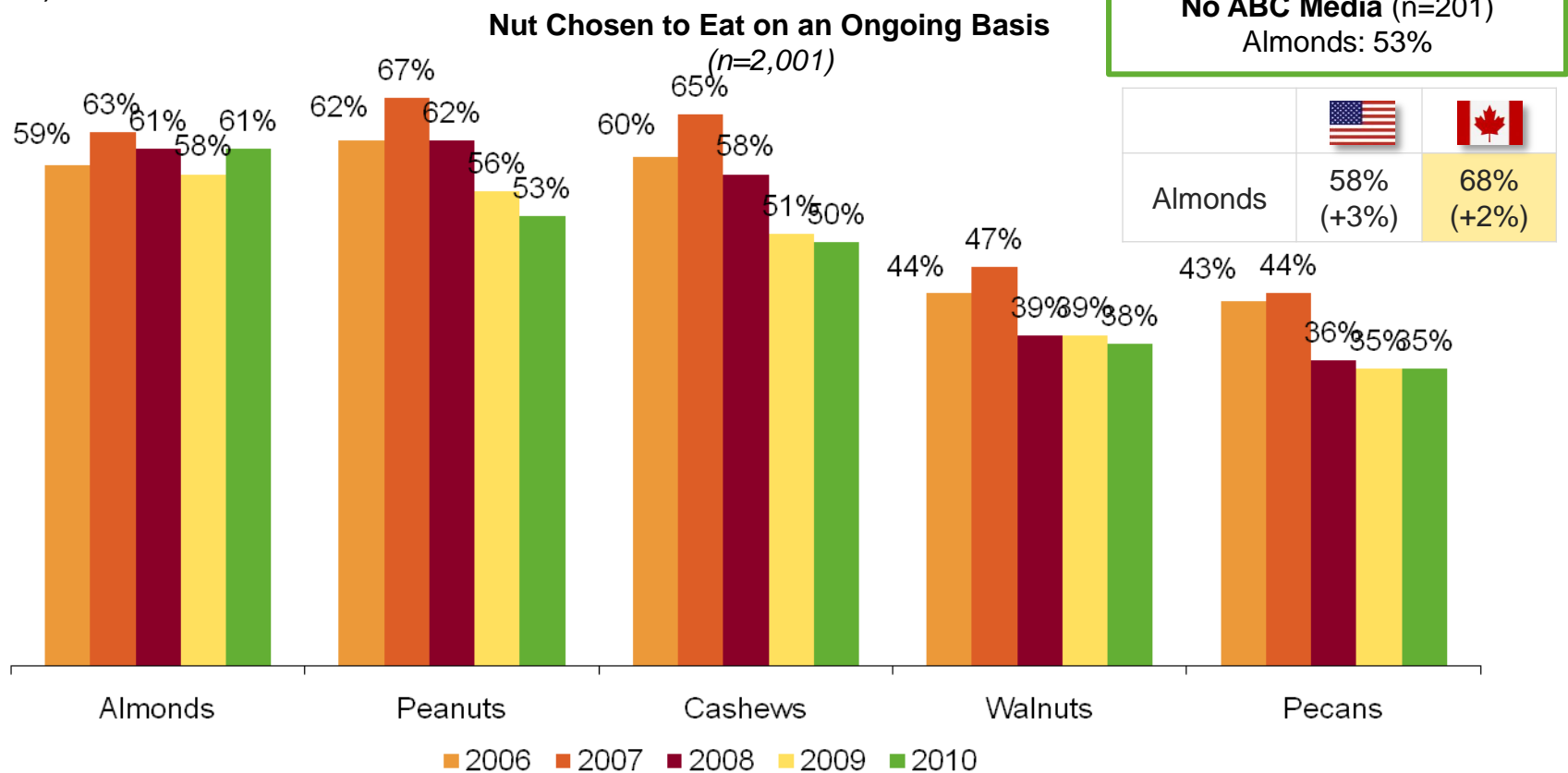
Q5b: Which nut is best described by each of the following...?



Usage: Ongoing Usage

Almonds continue to be the top nut for reported ongoing usage, beating out peanuts for the second year in a row (61% vs. 53%)

- Canadian respondents are even more likely to select almonds compared to U.S. consumers (68% vs. 58%)



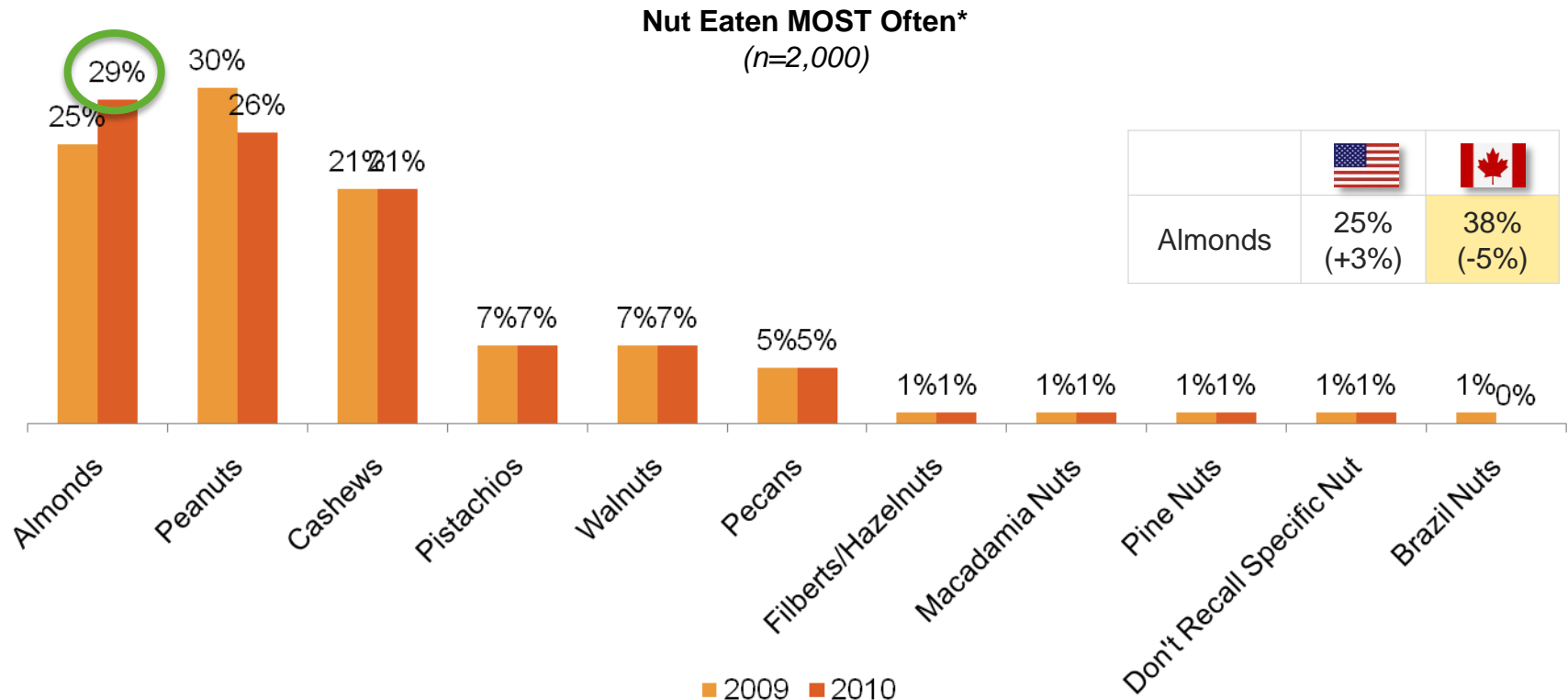
Q10: What nuts do you choose to eat either by themselves or in other foods on an ongoing basis?



Usage: Nut Eaten Most

When asked what nut respondents eat most often (as a snack and/or in other foods), almond top the list, beating out peanuts this year (29% vs. 26%)

- Canadian respondents are even more likely to report eating almonds most often compared to U.S. consumers (38% vs. 25%)
- No ABC media respondents report slightly lower scores for almonds (24% vs. 29%)



*Question added in 2009.
Q11: Which nut do you typically eat MOST often (as a snack and/or in other foods)?



Outlook on Growth



Key Market Indicators

As a result of programs, consumption, awareness and perception of almonds have all dramatically increased since 2001

- Due to large increases in supply, there remains room for additional growth in the North America market

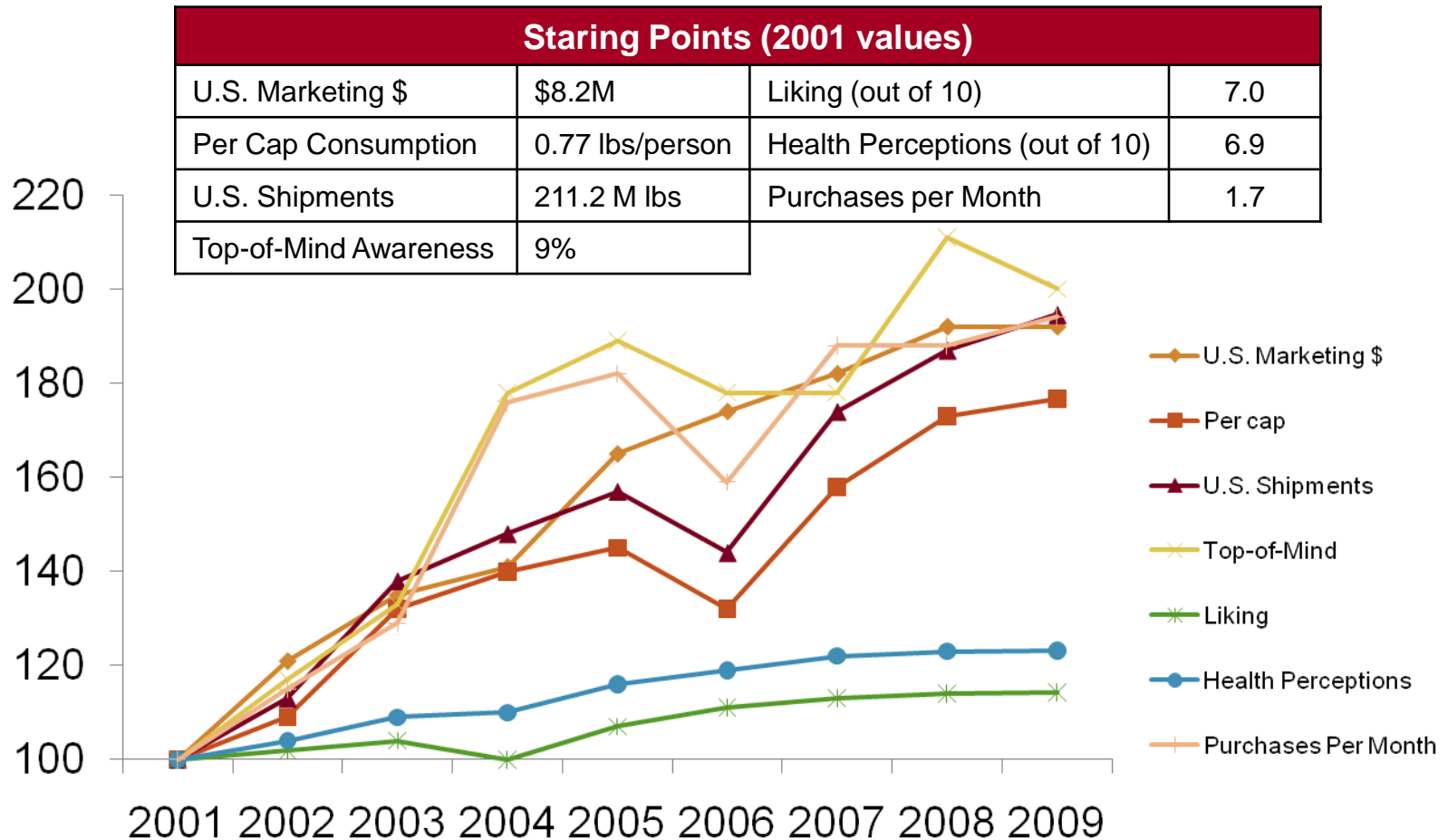
	2001	2003	2005	2007	2009	% increase (2001-2009)
US Shipments	211	292	332	269	411	95%
US Per Cap (lbs)	.77	1.02	1.12	1.22	1.36	76%
Top of Mind Awareness	9%	12%	17%	16%	18%	100%
Overall Liking	7	7.3	7.5	7.9	8.0	14%
Health	6.9	7.5	8.0	8.4	8.5	23%
Taste	7.2	7.4	7.58	8.0	8.0	11%
Crunch	7.5	7.7	7.9	8.0	8.0	7%
Purchases/month	1.7	2.2	3.1	3.2	3.3	94%
Ongoing Usage	23%	27%	40%	63%	58%	152%



Results Today

Usage has increased with consistent programs

- Decrease in 2006 correlates with small crop
- Rebound in 2007 shows demand was strong

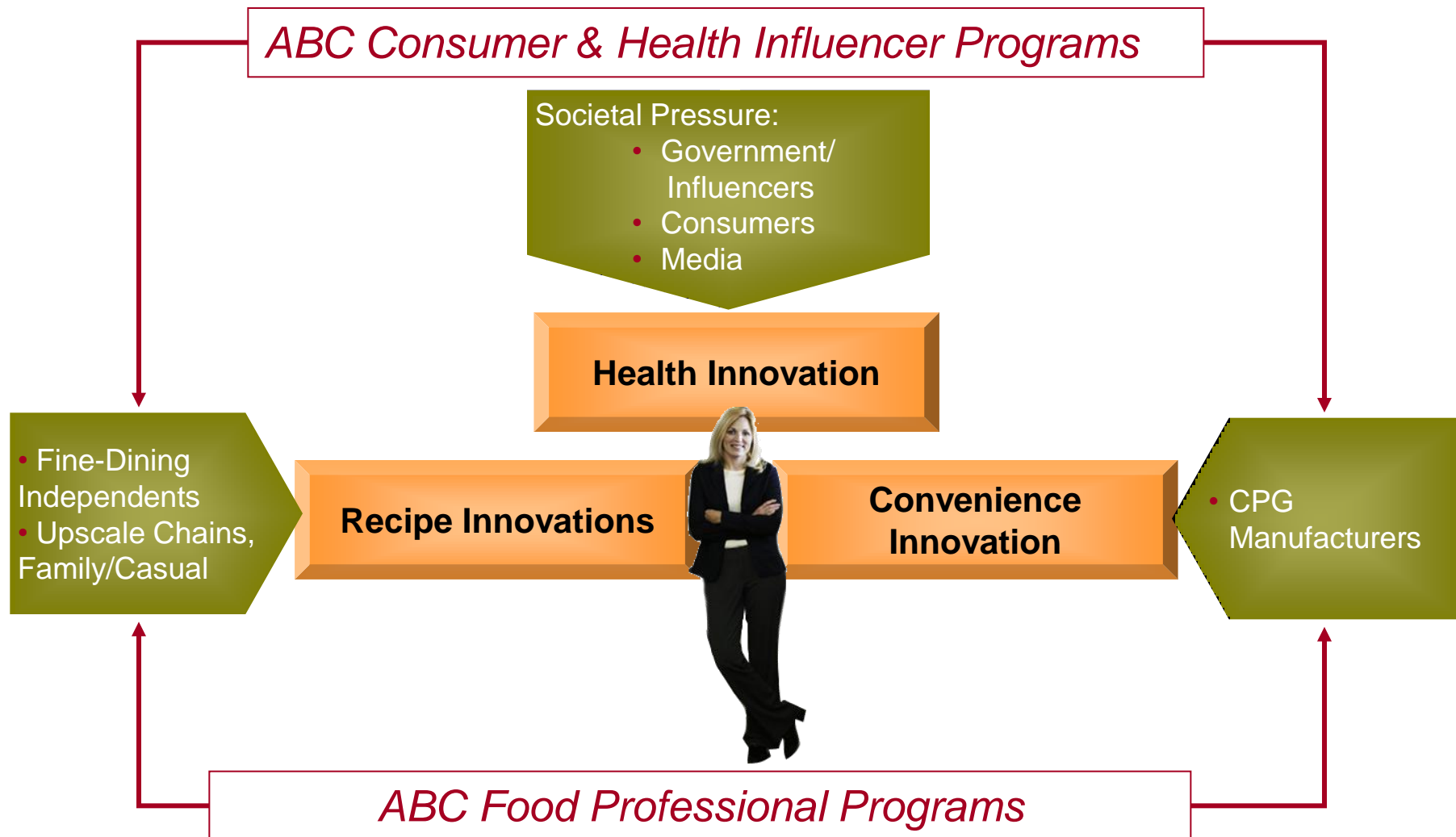




North American Marketing Program Overview



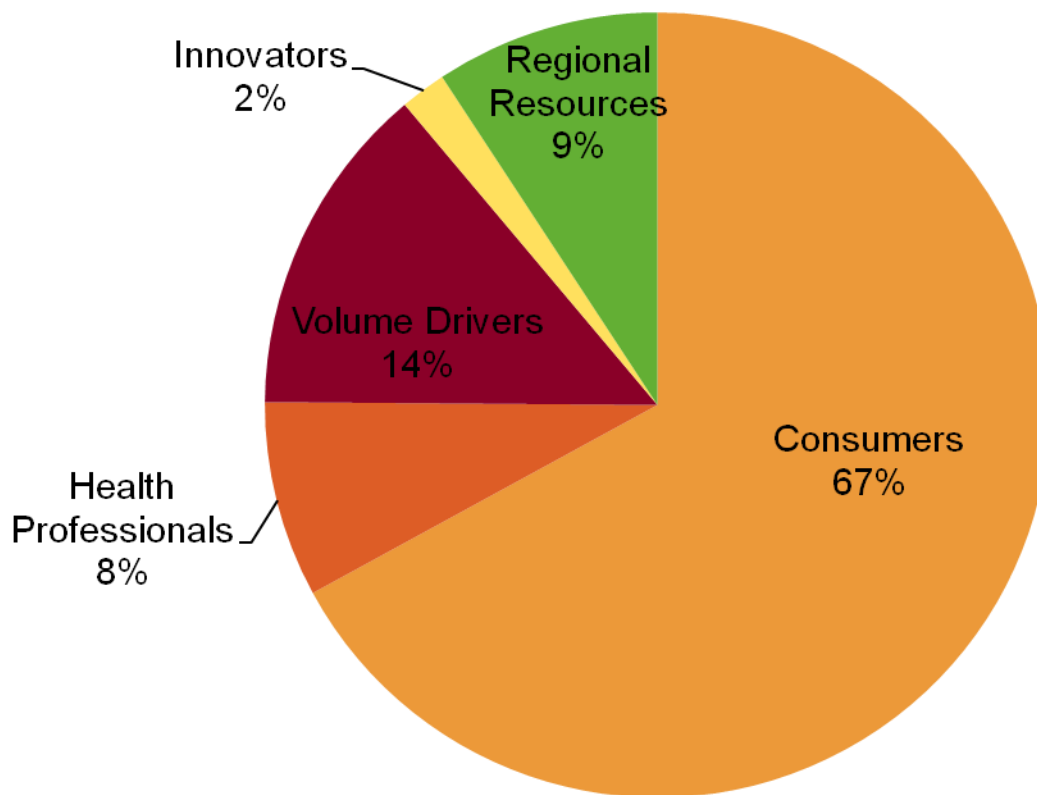
Communications Strategy





North American Investment

Budget by Target Audience



NA Consumer Advertising Campaign



A Handful of campaign debuted in January 2010 with four executions

- Objective of campaign is to connect with our target on a deeper emotional level and entice them to eat almonds every day

A handful of no regrets. Want a simple snack without the guilty aftereffect? Make sure heart-smart, nutrient-rich California Almonds are always within reach. Just a handful a day can help you maintain healthy cholesterol levels. Learn more about the power of a handful at AlmondsBoard.com

Good eats your almonds and heart health benefits because it's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand.

A handful of jet fuel. Find a snack that'll give you a real boost anytime, anywhere. A handful of heart-smart, nutrient-rich California Almonds, with 6 grams of protein power can be just the lift you need. It can even help you maintain healthy cholesterol. Learn more about the power of a handful at AlmondsBoard.com

Good eats your almonds and heart health benefits because it's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand.

A handful of your heart's desire. Want a snack that tenses your heart? Reach for heart-smart, nutrient-rich California Almonds. Just a handful a day can search your heart by helping you maintain healthy cholesterol levels. Learn more about the power of a handful at AlmondsBoard.com

Good eats your almonds and heart health benefits because it's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand.

A handful of putting your heart into it. Tension steps to stay fit? Get inspired from almonds and heart health. Just California Almonds. With 6 grams of protein power and can help you maintain healthy cholesterol levels. Learn more about the power of a handful at AlmondsBoard.com

Good eats your almonds and heart health benefits because it's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand. It's just a handful a day. That's why it's simple to make sure you have almonds on hand.



2010/11 Print Media Plan



26 print titles across 7 categories

Food Lifestyle	Health	Women's Service	Women's Lifestyle	Shelter	Men's Health/Lifestyle	Regional
<i>Cooking Light</i>	<i>Health</i>	<i>Good Housekeeping</i>	<i>More</i>	<i>BH&G</i>	<i>Men's Health</i>	<i>Sunset</i>
<i>Everyday Food</i>	<i>Prevention</i>	<i>Family Circle</i>	<i>Real Simple</i>	<i>Canadian Living – C</i>	<i>Men's Journal</i>	
<i>Food Network</i>	<i>Weight Watchers</i>	<i>Woman's Day</i>	<i>More – C</i>	<i>Coup de Pouce – C</i>		
	<i>Best Health – C</i>	<i>Chatelaine – C</i>	<i>Vita – C</i>			
	<i>Self</i>	<i>Chatelaine – C (F)</i>	<i>Oprah</i>			
		<i>Homemakers – C</i>				
		<i>Madame – C</i>				



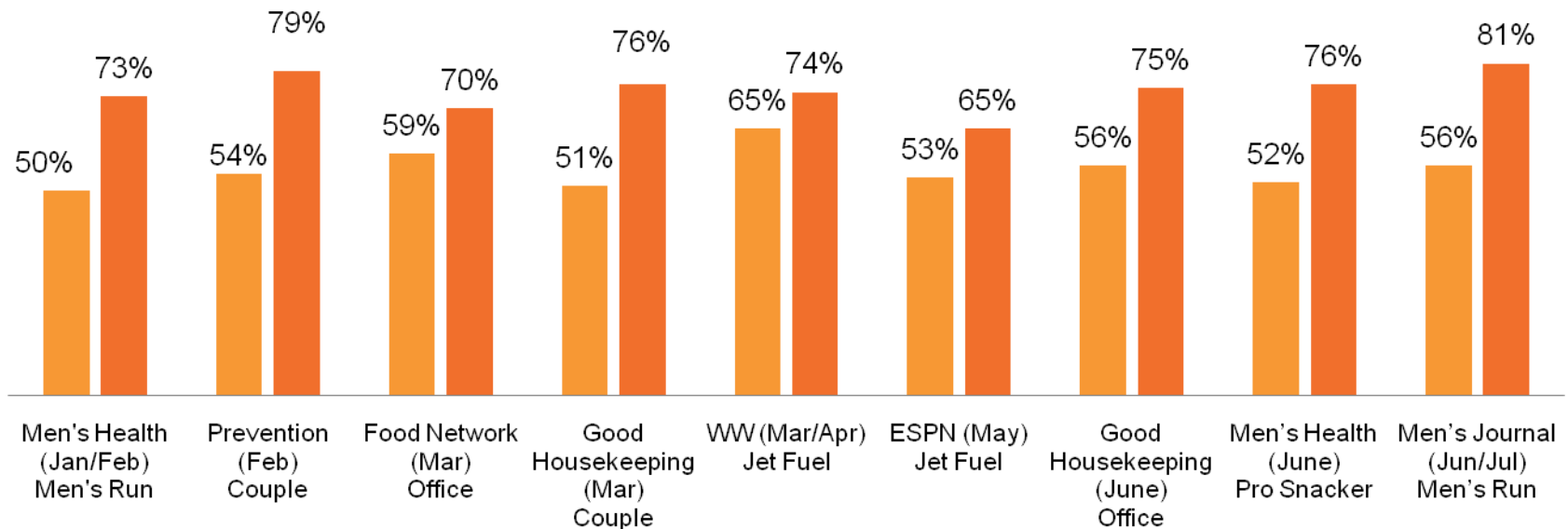
2009/10 Ad Testing Results

Overall, the *Handful* campaign average score for action taken was 19% higher than the issue norm average score.

- All ads tested significantly outscored the issue norm on actions taken, indicating that all executions have a clear call to action and consumers are responding to the message

Vista Actions Taken

■ Issue Norm ■ California Almonds





Online Advertising Plan

Appetite for Life



Healthy Men





ALMOND CONSUMERS

Change Site ▾

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almond lifestyle

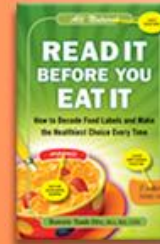
health + nutrition

recipe ideas

about almonds



BREAKFAST made easier



by **BONNIE TAUB-DIX**



today's recipe

more

Health Nut Almond
Oaties

Holiday
Almond Recipe

**Breakfast
Made Easier**

Gluten Free

Pro-Snacker

Pantry
Recipe Express



almond tips

Need something to tide you over until dinner? An ounce of almonds is the perfect pick-me-up.



more

almonds + heart

Discover the latest on almonds + heart health.



perfect portion

How to get your 23 a day.



eNews + recipe sign-up

Get the latest on almonds.



eStore

Cookbooks + almond tins.





Cooking Light

*Fiber, how do I love thee?
Let me count the ways.*

THE HEALTHY COOK'S 3-STEP PANTRY PLANNER



1 Take stock now

KNOW WHAT YOU HAVE, WHEN TO USE IT, AND WHEN TO TOSS IT.

Good for 6 months

Baking soda and baking powder: Both of these leavening agents typically last up to 6 months, but there is a way to test to see if they're still active:

FOR BAKING SODA, mix $\frac{1}{2}$ teaspoon with 2 teaspoons of vinegar.

FOR BAKING POWDER, mix 1 teaspoon with $\frac{1}{2}$ cup hot water. The mixtures should bubble immediately; if not, replace.

Brown rice: Because it's richer in oil than white rice, brown rice is more susceptible to rancidity. Store in an airtight container for up to 6 months.

Nuts: Presuming your pantry is cool, dark, and dry, nuts should be fine for 6 months stored in an airtight container. Or freeze for up to 1 year.

Oil: Turns rancid quickly, so keep it away from heat and light. Unopened containers last up to 6 months; once opened, use within 3 months. Buy small bottles of seldom-used oils.

Peanut butter: Store natural peanut butters, which often separate, in the refrigerator. The regular kind will be fine in your pantry up to 6 months after opening.



Woman's Day: One Perfect Snack - Almonds



A handful of ready, set, on-the-go.

Now a smart snack in the perfect portion can be at your fingertips anytime, anywhere. Just toss one of these almond snack tins in your purse, keep one in your car, or even drop it in your gym bag to keep you going strong wherever life takes you.



Visit AlmondBoard.com/shop to choose from three stylish tins and start getting your snack on track every day.



eat well eat healthy america

	SALTY	SWEET	SAVORY
just craving something...	10 medium black olives OR 1.3-oz bag Glenny's Salt & Pepper Soy Crisps	1 small whole-grain wrap (like Ezekiel 4:9) with 1 Tbsp Nutella spread and 1/2 cup sliced strawberries OR A homemade smoothie made with 6 oz skim milk, 1/2 cup frozen mango and 1/2 banana	1 cup red and yellow bell pepper strips with 1 Tbsp pesto dip or 1/2 cup lowfat onion dip OR 1 slice whole-wheat toast with 1/4 avocado, drizzled with 1 tsp olive oil and lemon juice
need an energy boost	10 honey-wheat pretzels (like Rold Gold) dipped in 2 tsp peanut butter OR 1 cup cherry tomatoes sprinkled with 1 oz feta cheese	6 oz lowfat vanilla yogurt with 2 Tbsp raisin-nut granola (such as Bear Naked) OR 3 whole-grain crackers (like Wasa) with 1 Tbsp reduced-fat cream cheese and 2 tsp fruit preserves	1/2 turkey sandwich on whole-grain bread with honey-Dijon mustard, lettuce and tomato OR 4 melba toast rounds with 1 Tbsp light cream cheese and 1 oz smoked salmon
when in doubt...	4 cups 94% fat-free popcorn (such as Pop Secret or Newman's Own) OR 20 spicy-salted pecans	2 whole-wheat fig bars (such as Whole Grain Fig Newtons) OR 1/2 cup chocolate sorbet with 1/2 cup fresh berries	1 Laughing Cow cheese wedge with 1/2 cup grapes OR 4" pita with 1 oz shredded mozzarella, 3 Tbsp tomato sauce and 3 basil leaves

ONE PERFECT SNACK: ALMONDS

They're rich in protein and healthy fats, so they'll keep you satisfied, protect your heart and taste like a treat. Just limit it to a handful of unsalted almonds (about 20). Or, for automatic portion control, pick up a 100-calorie pack (like Blue Diamond or Emerald). ▶



A handful of jet fuel. Grab a snack that'll give you a real boost anytime, anywhere. A handful of heart-smart, nutrient-rich California Almonds, with 6 grams of protein power can be just the lift you need. It can even help you maintain healthy cholesterol. Learn more about the power of a handful at AlmondBoard.com



Good news about almonds and heart health: Scientific evidence suggests, but does not prove, that eating 1.5 ounces per day of most nuts, such as almonds, as part of a diet low in saturated fat and cholesterol may reduce the risk of heart disease. One serving of almonds (28g) has 13g of unsaturated fat and only 1g of saturated fat.





Sunset: Green Almond Month

The West at its best

The April must list

10 quick ways to make the most of our favorite season

WILDLIFE ON TWITTER

If you can't rush out to a national park as spring arrives, get updates from Bob Roney, aka YosemiteBob. The veteran ranger at Yosemite National Park tweets observations (he'll let you know when the black bears gorge on berries) and might even Tweetpic a sunset rainbow. twitter.com/yosemitebob TIME: 5 TO 30 MINUTES

A FRESH WAY WITH WILDFLOWERS

The new Audubon Guides wildflower app can ID more than 1,800 species—try it out in your backyard or on a hike (it beats lugging a book). We love the function that adds pics to your "life list" of flowers spotted, but there are a few kinks to work out, like a crashy search. \$9.99; audubonguides.com TIME: 20+ MINUTES



HIBISCUS, THIS YEAR'S MINT Get it at Latino markets (sold as *jamaica*) and toss it in lemonade or freeze it for pops. Just boil 2 cups dried hibiscus, 5 cups water, and 1 cup sugar. Let cool. Strain into a bowl, pour into molds, and freeze. Makes 10 to 12. TIME: 45 MINUTES TO 1 HOUR, PLUS FREEZING TIME

5 MIN.



CLASSIC SWEET PEA, MODERN TWIST Make a fragrant single-flower bouquet using deep purple sweet peas instead of old-timey pastels. TIME: 5 MINUTES



GREEN ALMOND MONTH These are the *beaujolais nouveau* of the nut world—a young almond available only from late April to early May. Serve them as a snack with olive oil and salt or toss them in salads; their herbaceous flavors are the opposite of the mature, toasty almond. Look for them at farmers' markets or specialty stores online. TIME: 30 MINUTES

1 HR.

APRIL'S CHEESE PLATE Pick up spring cheeses at your nearest artisanal shop. This is the season when cows, sheep, and goats eat sweet young grasses, making cheeses taste bright. Some are available only now, like Cowgirl Creamery's St Pat (cowgirlcreamery.com). TIME: 45 MINUTES





Shape: Almond Flour – The New Superfood



quick & healthy

almond flour the new superfood?

Try a healthier twist on baking by swapping out wheat flour for this protein-packed alternative.

BY ELANA AMSTERDAM

JUST BECAUSE YOU'VE DECIDED TO DROP pounds or go gluten-free doesn't mean you have to give up carb-rich foods, like pancakes and pizza. Instead, you can transform them—and make them healthier in the process—by trading wheat flour for almond flour (simply blanched, ground almonds). You'll get more protein and fiber, plus hefty doses of calcium, magnesium, and antioxidant vitamin E. →

DIET STRATEGY
Make meals more nutritious with almond flour.

The combo of protein and fiber in pancakes with blueberry-peach sauce will keep you full until lunch.

quick & healthy

chef's tips

WHERE THE HECK DO YOU FIND THIS STUFF?

- ✓ Almond flour is sold in health food stores, but you'll pay about \$15 a pound. Get a better deal online at Nuts Online (\$7 per pound; nutsonline.com) or Honeyville Grain (\$29 for five pounds; honeyvillegrain.com).
- ✓ Always buy blanched almond flour; it's better for baking than the unblanched kind or almond meal.
- ✓ Store almond flour in the fridge or freezer and it will keep for six months to a year.

Chicken and dumpling soup with red peppers and spinach is a good source of vitamins A and C.

Almond flour has about 50 percent more calories than wheat flour and is higher in fat—but that can work to your advantage. The fat is a heart-healthy monounsaturated kind, and almond flour is low on the glycemic index scale—scoring less than 1 versus 70 for whole-wheat flour. That means it's digested slowly, keeping blood sugar levels steady, so you eat less and stay satisfied longer. If you want to improve your health and lose a few inches off your waist, give these easy, high-protein dishes a try.

HICKEN AND DUMPLING SOUP WITH RED PEPPERS AND SPINACH

If you have leftover cooked chicken, toss it into the pot when you add the peppers and spinach.

Serves 8
Prep time: 30 minutes
Total time: 3 1/2 hours

- 4 large eggs
- 1 teaspoon sea salt
- 1/4 teaspoon freshly ground black pepper

- 2 cups blanched almond flour
- 6 cups low-sodium chicken broth
- 1 large red pepper, diced
- 2 cups baby spinach, chopped

To make the dumplings, beat eggs, salt, and pepper with an electric mixer in a medium bowl for 2 to 3 minutes or until fluffy. Stir in almond flour and refrigerate mixture for about 3 hours or until dough is firm.

Fill a stockpot with water and heat over high. While waiting for water to

ASPARAGUS AND GOAT CHEESE PIZZA

Not an asparagus fan? Use broccoli or red peppers in this dish instead.

Serves 4
Prep time: 30 minutes
Total time: 60 minutes

quick & healthy

- 2 teaspoons olive oil
- 1/2 small onion, finely sliced
- 1 1/2-inch asparagus pieces
- 2 cups blanched almond flour
- 2 teaspoons sea salt, divided
- 1/2 teaspoon baking soda
- 1/2 teaspoon grape seed canola oil
- 1/2 egg
- 1/2 cups tomato paste
- 1/2 water
- 1/2 teaspoon herbes de Provence
- 1/2 teaspoon minced garlic
- 1/2 cups goat cheese

Preheat oven to 350°F. In a large bowl, whisk together oil and egg. Stir wet ingredients into almond flour mixture until thoroughly combined.

Roll out the dough on a parchment-lined sheet. Place the dough between the parchment and use a rolling pin to flatten it into a 10-inch circle, about 1/4 inch thick. Remove top piece of parchment and transfer bottom piece with rolled-out dough onto a baking sheet. Bake for 15 to 20 minutes or until lightly golden.

While the crust bakes, mix the pizza sauce: Bring tomato paste, water, herbes de Provence, remaining salt, and garlic to a boil. Lower heat and simmer for 10 to 15 minutes or until sauce has thickened.

Spread sauce over the crust while the crust is still warm. Crumble goat cheese evenly over the sauce, then top with onion and asparagus mixture. Bake for 10 to 15 minutes to warm the cheese. Let cool briefly, then cut into 8 slices and serve.



Cut 2 pieces of parchment paper to the size of a baking sheet. Place the dough between the parchment and use a rolling pin to flatten it into a 10-inch circle, about 1/4 inch thick. Remove top piece of parchment and transfer bottom piece with rolled-out dough onto a baking sheet. Bake for 15 to 20 minutes or until lightly golden.

While the crust bakes, mix the pizza sauce: Bring tomato paste, water, herbes de Provence, remaining salt, and garlic to a boil. Lower heat and simmer for 10 to 15 minutes or until sauce has thickened.

Spread sauce over the crust while the crust is still warm. Crumble goat cheese evenly over the sauce, then top with onion and asparagus mixture. Bake for 10 to 15 minutes to warm the cheese. Let cool briefly, then cut into 8 slices and serve.

beyond wheat flour

Branch out and try some of the other super-flours on the market.

BY TRISHA CALVO

ALMOND FLOUR	CHICKPEA/FAVA BEAN FLOUR	OAT FLOUR	RICE FLOUR
22	19	15	6
GRAMS PROTEIN	GRAMS PROTEIN	GRAMS PROTEIN	GRAMS PROTEIN
364 calories	364 calories	404 calories	366 calories
49 g fat	6 g fat	9 g fat	1 g fat
10 g carbs	60 g carbs	66 g carbs	80 g carbs
12 g fiber	17 g fiber	7 g fiber	2 g fiber
6 mg calcium	106 mg calcium	58 mg calcium	10 mg calcium
HOW TO USE IT	HOW TO USE IT	HOW TO USE IT	HOW TO USE IT
Trade equal amounts of almond flour in cookies, cakes, quick breads, and pizza dough, or use half wheat flour and half almond flour.	Try 5 in meat loaf and meatballs in place of flour or bread crumbs to help hold the ingredients together and add fiber.	Oat flour alone can be dense, so you'll get a lighter texture if you use it to replace about one-third of the wheat flour in recipes.	Rice flour can be grainy, so typically combined with tapioca flour (along with xanthan gum) in gluten-free baking.

Almond flour helps lower cholesterol and blood sugar.



Woman's Day: Almonds as a Healthy Solution



be well diet

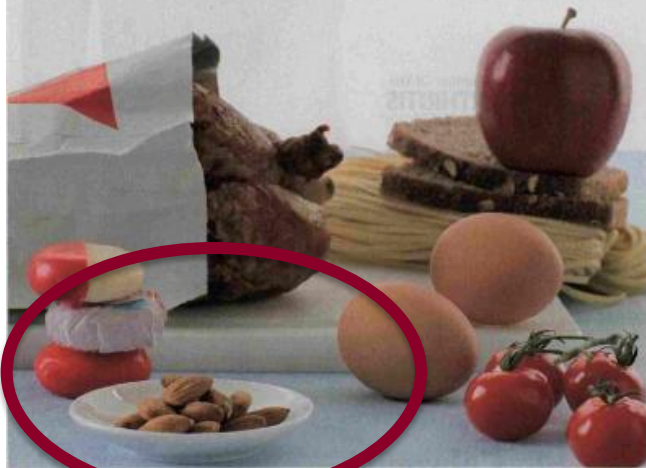
no time to eat healthy?

by Marissa Lippert, RD



No problem! Here's how to get slim on a hectic schedule

In an ideal world, you'd make every meal from scratch. But in reality, few of us have the time or energy. Fortunately, there is a way to lose weight without spending hours in the kitchen. The key is to rely on a mix of fresh ingredients and healthy convenience foods. But how do you find the good stuff when so many packaged items are loaded with fat, salt and preservatives? A good guide: Choose the ones that have the fewest ingredients. Start with our list on page 134, then see page 139 to see how these foods fit into a plan that'll help you lose 1 to 2 pounds a week.



be well diet

healthy packaged foods

- Dr. Praeger's California Veggie Burgers
- Jennie-O Turkey Burgers
- Health Is Wealth Chicken Patties
- Kashi Red Curry Chicken
- Applegate Farms Spinach & Feta Sausage
- Frozen precooked, peeled and cleaned tail-off shrimp (like Chicken of the Sea)
- 4-oz single-serve tuna packets
- Canned beans (black, kidney, cannellini) and/or chickpeas
- Kashi Thin Crust Roasted Vegetable Pizza
- Precooked rotisserie chicken (pick one up on your way home from work)
- Van's Organic Flax Waffles
- Food for Life Ezekiel 4-9 Cinnamon Raisin English Muffins
- Whole-grain sliced bread
- Precooked whole-wheat pasta, like Buitoni 100% Whole Wheat Linguine
- Amy's Breakfast Scramble Wrap
- Amy's Roasted Vegetable Lasagna
- Amy's Light in Sodium Brown Rice & Vegetables Bowl
- Uncle Ben's Ready Rice—Whole Grain Brown (cooks in 90 seconds)
- Near East Whole Grain Blends Wheat Couscous
- Bagged frozen fruit (mangoes, berries, etc.)
- Frozen vegetables (green beans, mixed vegetables, etc.)
- Frozen roasted red potatoes, like Alexia
- Fresh precut fruit (like cantaloupe chunks)
- Bagged precut stir-fry veggies (fresh or frozen)
- Bagged salad greens
- Low-sodium canned or boxed soup or veggie chili, like Pacific, Amy's and Health Valley
- McCain Oatmeal
- 100-calorie packs of unsalted almonds or other nuts
- All-natural peanut butter, in regular or single-serve packets (like Slivered)
- Slivered almonds and/or chopped peanuts
- Ready-made hummus and/or guacamole
- Single-serve yogurt, like Fage Total 0% or 2% Greek Yogurt
- The Laughing Cow cheese wedges or Mini Babybel Light cheese rounds
- All-natural granola bars (like Nature Valley or Barbara's Organic)

FRESH FOODS READY IN A FLASH

Packaged foods aren't your only quick option. Here are some useful items to keep handy in your fridge or freezer.

EGGS

It only takes a few minutes to scramble up some protein—even for dinner.

POULTRY & FISH

such as skinless chicken tenderloins and single-serve (4-oz) salmon fillets.

EASY-TO-EAT WHOLE FRUIT

such as bananas, apples, plums, pears, etc.

HEALTHY FAST-FOOD PICKS

Sometimes the fastest option really is fastest. (Just try not to do it more than once or twice a week!) Smart choices to help you make the best of it.

TACO BELL

- 2 Fresco Soft Tacos (Ranchero Chicken, 340 cal, 8 g fat, Grilled Steak, 320 cal, 9 g fat)
- Fresco Bean Burrito with Guacamole (375 cal, 11 g fat)

KFC

- Grilled chicken breast with mashed potatoes and green beans (300 cal, 9 g fat)
- Grilled Chicken BLT Salad with Light Italian Dressing (230 cal, 7.5 g fat)

MCDONALD'S

- Hamburger with small fries (480 cal, 20 g fat)
- Premium Southwest Salad with Newman's Own Creamy Southwest Dressing (240 cal, 10.5 g fat)

PIZZA HUT

- 2 slices Thin 'N Crispy Pepperoni & Mushroom Pizza (380 cal, 16 g fat)
- 2 slices Thin 'N Crispy Veggie Lover's Pizza (360 cal, 12 g fat)

STARBUCKS

- Protein Plate with Peanut Butter (370 cal, 17 g fat)
- Egg White Spinach and Feta Wrap (280 cal, 10 g fat)

be well diet

3-day meal plan

To show you how to weave convenience food into your slim-down plan, we've created these sample menus. Each day adds up to about 1,600 calories. (If you need more or fewer calories, simply add or subtract a snack—each one is about 100 calories.) Feel free to mix and match breakfasts, lunches, dinners and snacks as you go.

DAY 1

- BREAKFAST**
- Amy's Breakfast Scramble Wrap (or 2 eggs with 2 Tbsp cheddar and 1 slice whole-grain toast)
- ½ cup precut cantaloupe chunks

LUNCH

- 1 cup Pacific Low-Sodium Butternut Squash Soup
- 1 slice whole-grain bread with 2 slices fresh mozzarella, 2 slices tomato and 2 basil leaves

DINNER

- Heat 2 tsp peanut oil in a skillet; add 2 cups precut stir-fry vegetables. Sauté for 2 minutes. Add 3 oz frozen precooked, peeled and cleaned tail-off shrimp, 1 tsp minced garlic, ½ tsp minced fresh (or jarred) ginger and 1 Tbsp low-sodium soy sauce. Cook about 2 minutes longer. Top with 2 tsp chopped peanuts.

SNACKS

- Piece of fruit
- 6 oz Fage Total 2% Greek yogurt with 1 Tbsp dark chocolate chips

DAY 2

- BREAKFAST**
- 2 Van's Organic Flax Waffles (or other whole grain waffles) with ½ cup fresh or frozen berries and 2 tsp maple syrup

LUNCH

- 2 cups arugula (or other bagged salad greens) mixed with ½ cup cannellini or other canned beans, 4 oz tuna from a single-serve packet and ½ cup cherry tomatoes. Toss with 1 Tbsp roasted garlic vinaigrette (like Annie's Naturals).

DINNER

- 12 multigrain pita chips (like Stacy's) and 2 Tbsp hummus
- 4 oz precooked rotisserie chicken
- 2 cups frozen steamed French-cut green beans tossed with 1 Tbsp slivered almonds
- 1 cup frozen red potatoes, like Alexia

SNACKS

- 1 apple with 1 Tbsp all-natural peanut butter
- All-natural granola bar (like Nature Valley or Barbara's Organic)

DAY 3

- BREAKFAST**
- 1 McCann's (or other plain) packet microwavable oatmeal with 1 small sliced banana, 2 tsp maple syrup. Top with 2 Tbsp slivered almonds or 100-calorie pack of nuts

LUNCH

- Dr. Praeger's California Veggie Burger on 1 slice whole-grain bread topped with 2 Tbsp prepared guacamole, red onion, lettuce and tomato

DINNER

- 4-oz salmon fillet dusted with cumin, salt and pepper, and sprinkled with 1 Tbsp lime juice. Pan-grill 3 to 5 minutes on each side.
- 1½ cups sautéed frozen vegetables (such as pepper-and-onion blend)

SNACKS

- 1 Babybel cheese wedge with 1 cup red or green grapes
- 1 single-serve (4 oz) ice cream or frozen yogurt topped with ½ cup fresh or frozen berries

THE GET-REAL BASICS

- Eat 3 meals and 1 or 2 snacks every day.
- Aim for 2 to 3 servings of lean protein daily, 3 servings of calcium and 3 to 5 servings of healthy grains.
- Focus on volume-rich foods (filled with lots of water or air to keep you full).
- Eat mostly complex carbs.
- Eat mostly healthy fats.
- Choose fresh foods over packaged ones when possible.
- Keep a food diary.
- Make tradeoffs: If you overdo it at one meal, downsize the next (but no meal skipping!).
- Aim for about 1,500 to 1,700 calories a day (to lose 1 to 2 pounds a week).



Better Homes and Gardens: Almonds: Heart-Friendly Foods



better HEALTH 185 FAMILY 208 MONEY 218

love your heart

The harsh reality: Heart disease is the No. 1 killer of women. The heartening truth: It's almost entirely preventable. Here's what you can do to reduce your risk—starting today.

by DOUG DONALDSON photos KATHERYN GAMBLE food styling JENNIFER PETERSON

They call heart disease the silent killer for a reason. "It's challenging to prevent because you don't feel it," says Dr. Elizabeth Klodas, a spokeswoman for the American College of Cardiology and author of *Slay the Giant: The Power of Prevention in Defeating Heart Disease*. "By the time you have chest pain or shortness of breath, the process is incredibly advanced."

However, unless you have a congenital condition or genetic predisposition to cardiovascular disease, the most part you are in control of your heart health. You can dramatically lower your risk—by 80 percent—with diet, exercise, and lifestyle changes. On the following pages, nutrition experts, doctors, and scientists offer proven strategies to keep cardiovascular disease at bay.

BETTER HOMES AND GARDENS FEBRUARY 2010

better HEALTH

>> **heart-friendly foods**

Your best weapons in the fight against heart disease can be pretty tasty. Load up on these nutrient-packed foods.

GRAPE JUICE
Grape juice, like wine, has antioxidant compounds that reduce LDL (bad) cholesterol and the chance of blood clots. Flavonoids in grape juice also help increase HDL (good) cholesterol and lower blood pressure. If you opt for wine, keep it to about one glass a day.

GRASS-FED BEEF
Licking red meat is wise, but when you do eat it, aim for grass-fed beef. It has a higher concentration of conjugated linoleic acid (CLA) than grain-fed beef, which can reduce your risk of cardiovascular disease. A 3½-ounce serving of grass-fed beef has more than double the amount of CLA found in grain-fed beef.

SOYBEANS
One cup of these beans, also called edamame, has a whopping 16 grams of protein and 8 grams of fiber—½ of the daily fiber recommended by the American Heart Association.

SALMON
The omega-3 fatty acids in salmon may decrease triglyceride levels and slightly lower blood pressure. Eat 3 ounces twice a week.

SPINACH
A ½-cup serving of fresh spinach or other dark green leafy veggies packs more heart-protecting benefits than just about any other food.

ALMONDS
These omega-3-rich nuts lower cholesterol. Munch 23 almonds (1½ oz.) daily.

QATMEAL
The fiber in oatmeal helps pull bad cholesterol out of your system. Consume oatmeal with at least 5 grams of fiber per serving at least three times a week.

CANOLA OIL
Use canola oil to reduce saturated fat in your diet and increase omega-3 fatty acids.

BERRIES
Antioxidants in berries—especially blueberries—show promise in many areas of heart health. A berry-rich diet may regulate blood pressure and boost HDL.

PHOTO: GETTY IMAGES (TOP); KEVIN MAZUR

The Cleveland Clinic, whose heart program has been ranked No. 1 for 15 years in a row by U.S. News and World Report, has selected its top 40 heart-protecting foods: hearthealthyonline.com/top-40. For heart-friendly recipes in this issue, see "Heartwise in the Kitchen," page 196.

188 FEBRUARY 2010 BETTER HOMES AND GARDENS



Thank You



Targeting the EU Consumer Snack Opportunity

Dariela Roffe-Rackind, Almond Board of California





European Market & Program Overview



European Overview

European Context

European research investment

Current Almond Usage Assessment

European Market NEW Consumer

- *How the market is changing?*
- *Who is the almond consumer?*

Almond Board European Marketing Program Overview

- *How we are reaching changing consumers*



The European Market

- 1. Programs traditionally focused on UK, France & Germany**
 - 3 largest European populations (42% of total EU population)
 - Largest retail food spenders (46% of total EU retail food spend)
 - Top 3 European markets for new almond product introductions
- 2. Media-focused outreach building momentum with consumers and health professionals since approx. 2001/02. Manufacturer outreach in 2008.**
- 3. Concentration of global/multinational food manufacturers in EU**
 - Traditionally an ingredient market
 - Europe continues to introduce more almond products than any other region
 - Europe is a major trend driver for the rest of the world especially in chocolate/confectionery
 - Highest value bakery market in the world
 - Snack market is largely undeveloped



Investment in EU Research (2009/10)



EU Research	
2009	In-depth consumer assessment study in Europe to identify common beliefs, values, attitudes and opportunities to reach EU target consumer (Jane) across the region (secondary research + focus groups)
2009/10	Global New Products Report
January 2010	Consumer Attitudes, Awareness & Usage study (France, Germany, UK, Poland)
January 2010	Health Professional survey in France, Germany, Poland and the UK
September 2010	Packaged Foods Professionals Attitudes, Awareness & Usage study
August 2010	Analysis of retail sales data from the UK, France and German packaged snack nut market
November 2010	Snacking global market assessment
December 2010	Qualitative Study of 1800 consumers in France, UK and Germany to better understand consumer motivations and considerations when choosing a snack



Current Almond Usage Assessment



Current Almond Usage Assessment

In August 2010, an assessment was completed to analyze the retail sales data from the UK, France and German packaged snack nut market

- The category is defined as: *Usually processed by either cooking in oil or dry roasting, but raw de-shelled nuts sold as snacks are also included. Products often come pre-salted and are packed in tins, cartons and foil or plastic laminated pouches. Includes peanuts, cashews, mixed nuts and a variety of specialized products, including almonds and pistachios. Note: Fruit and nut mixes or trail mixes and nuts used for cooking/baking are excluded.*

In addition, an analysis was done to evaluate the chocolate confectionary and cereal categories in the UK



Almond Share: IRI Analysis

Almond products (including mixed nuts) account for 12%-18% of the snack nut market across the EU3

- **“Pure” almond products (i.e. almond-only products) are just 2% of snack nut volume sales in the U.K.**

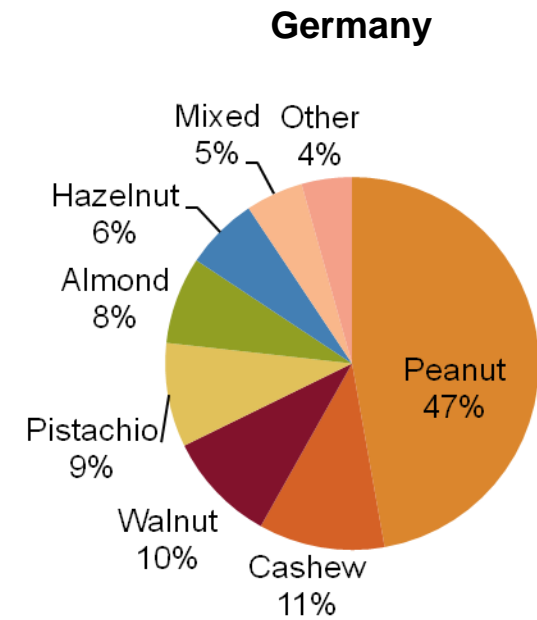
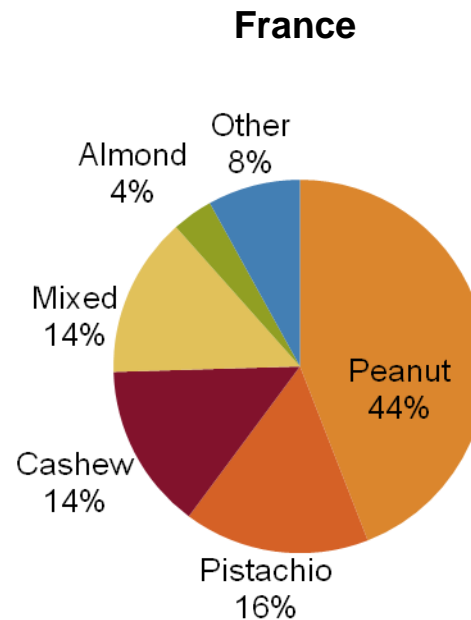
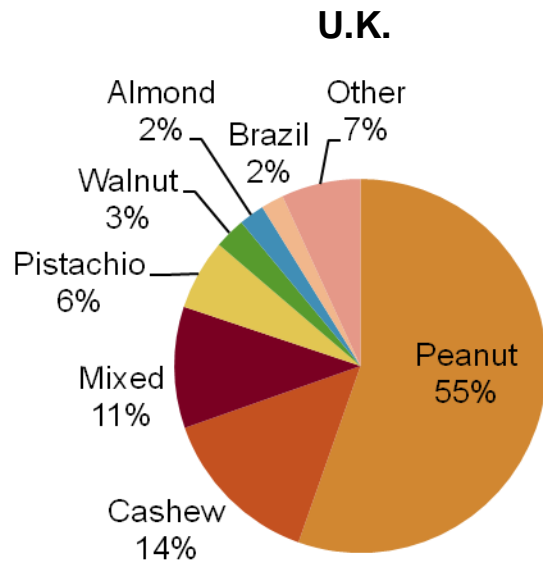
IRI Analysis (millions of lbs.)	U.S. (2001)	U.S. (2009)	U.K.	France	Germany
Total Snack Nuts	210	373	90	92	181
Almond Products (including mixes and “pure” products)	34	111	11	16	23
“Pure” Almond Products Only	5.7	55	2.0	3.3	13.6
Almond Product Share (including mixes and “pure” products)	16%	30%	13%	18%	12%
Pure Almond Share	3%	15%	2%	4%	8%



Almond Share vs. Other Nuts

Peanuts are especially dominant among snack nuts in the U.K.

- Pistachios have a significantly larger share in France





Snack Involvement

The U.K. is a relatively strong snacking market, but almonds are currently underrepresented

	<i>U.S. (2001)</i>	<i>U.S. (2009)</i>	U.K.	France	Germany	Germany IRI only
Packaged Snack Volume (millions of lbs.)	7,196	7,891	1,009	365	552	552
Packaged Snacks Per Capita (lbs.)	35.3	35.2	20.2	7.3	8.5	8.5
Snack Nut Volume (millions of lbs.)	495	739	110	101	70	181
Snack Nuts Per Capita (lbs.)	2.43	3.30	2.19	2.02	1.08	2.78
Snack Nut Share of Packaged Snacks	7%	9%	11%	28%	13%	33%
Almond Snack Nut Volume (millions of lbs.)	22	122	3.8	5.3	5.7	15
Almond Snack Per Capita (lbs.)	0.11	0.55	0.08	0.11	0.09	0.23
Almond Share of Snack Nuts	4%	17%	3%	5%	8%	8%
Almond Share of Packaged Snacks	0.3%	1.6%	0.4%	1.5%	1.0%	2.7%



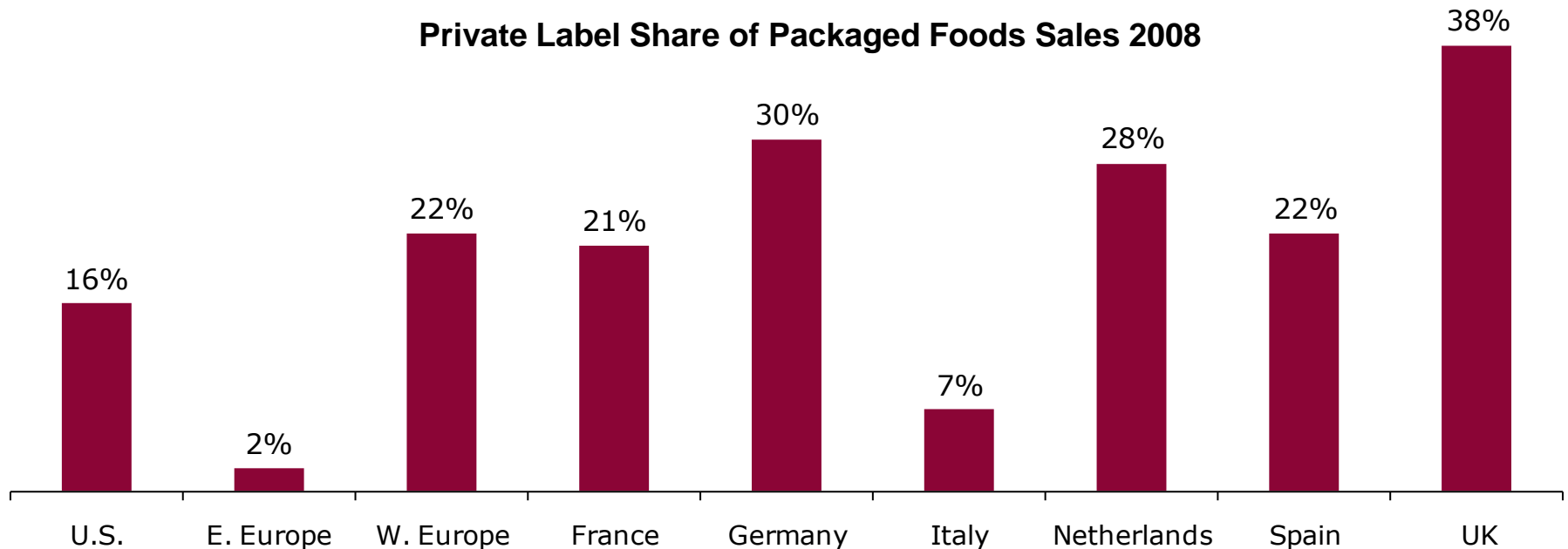
Retail Landscape: Private Label

Nearly one-fourth of all packaged food sales in Western Europe are private label products

The more consolidated the grocery channel, the stronger the penetration of private label

- For example, due to greater fragmentation in grocery, Italy is not as strong in private label

Private Label Share of Packaged Foods Sales 2008



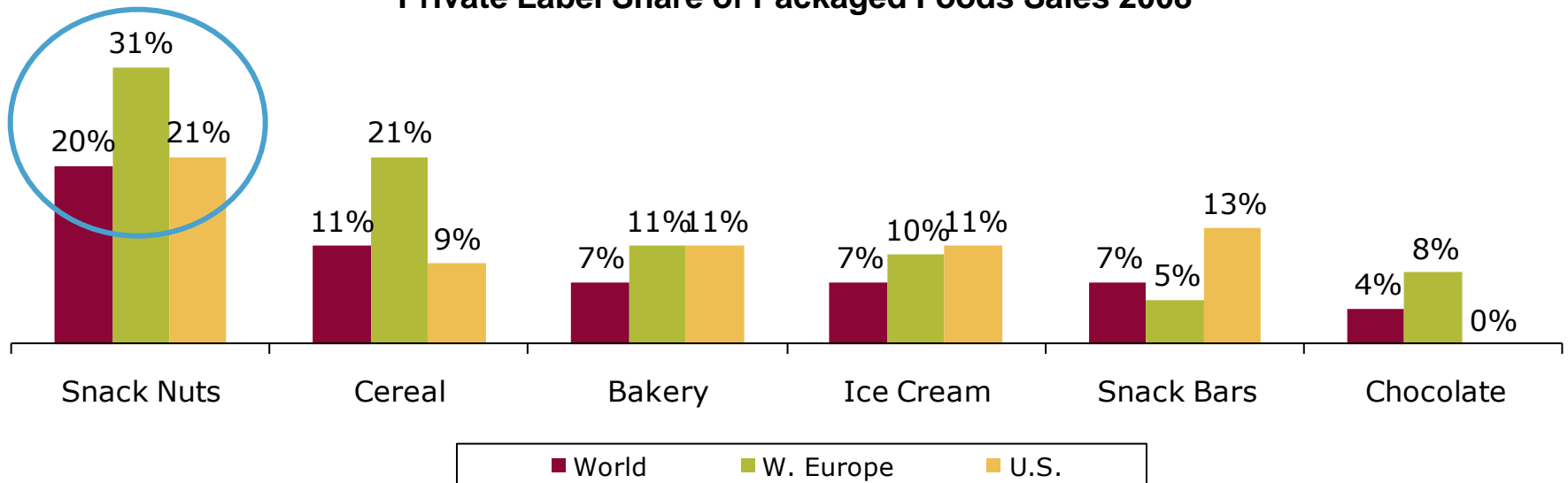


Retail Landscape: Private Label

Private label is especially important in packaged snack nuts – more so than for other almond ingredient categories

- **Private label accounts for nearly one third of packaged snack nuts sales in Western Europe**

Private Label Share of Packaged Foods Sales 2008





Opportunity Assessment

UK market significantly behind it's European counterparts and the US, reporting 0.4%, as compared to France's 1.5% and Germany's 1.0% (US at 1.6%)

The UK packaged snack volume is the largest of the EU3

- More than 2.5x larger than France
- Nearly 2x larger than Germany

UK has the largest packaged snack market, yet the lowest snack nuts per capita, almond snack consumption per capita, almond share of snack nuts and almonds share of packaged snacks

- Indicates greatest fastest potential within existing snack category is in the UK
- Private label accounts for nearly one third of packaged snack nuts sales in Western Europe



**European Market NEW
Consumer**



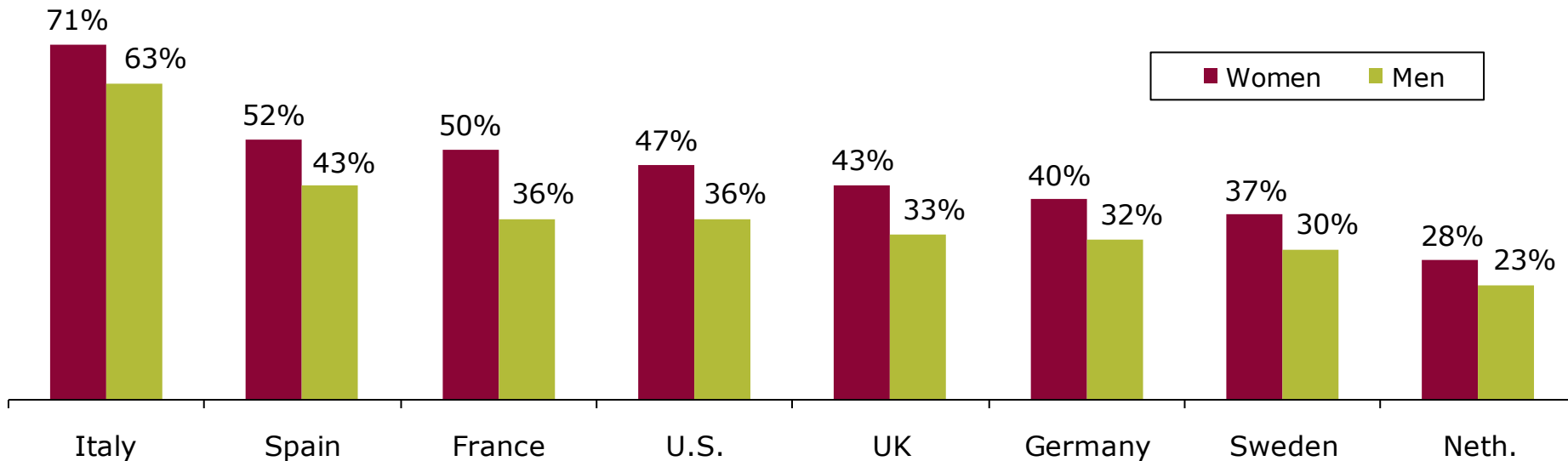
European Market Consumers: Lifestyle Shifts

Feeling time constrained

Europeans, especially women, are feeling time pressured—even in the stereotypically laid-back Southern markets

- The number of women who work is increasing

“It is difficult to manage my daily obligations and find time to relax” (% agree)





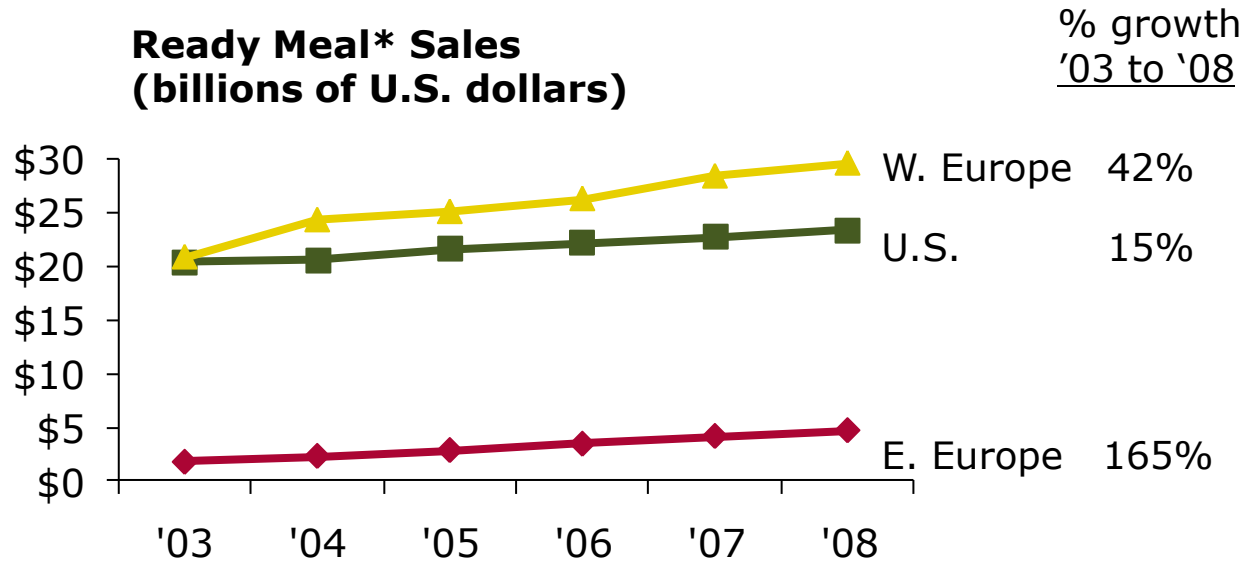
European Market Consumers: Lifestyle Shifts

Looking for solutions

Despite strong cooking traditions in many markets, the use of ready meals is widespread and growing



Ready Meal* Sales
(billions of U.S. dollars)



*Ready Meals = the aggregation of canned/preserved, frozen, dried, chilled ready meals, dinner mixes, frozen pizza, chilled pizza and prepared salads. Note: Ready meals are products that have had recipe "skills" added to them by the manufacturer, resulting in a high degree of readiness, completion and convenience.

Source: Euromonitor market statistics.



European Market Consumers: Lifestyle Shifts

Changing eating habits

Lifestyle changes have led to a decline in traditional meal times and formal dining occasions

As a result, Europeans are snacking regularly

- **While snacking was not historically part of the culture for many European markets, busier lifestyles have impacted the way people eat throughout Europe**
- **On average, Europeans snack only about 1.5 times per week less than Americans**

Market	Average # of Snacks per Week
UK	14.4
Netherlands	14.3
Spain	13.6
Italy	13.5
Germany	13.2
Sweden	12.8
France	12.7
TOTAL Europe	13.4
U.S.	15.0



Snacking: Food Choices

- European Jane easily classifies snacks as either good or bad but wants both in her diet
- Nuts, with the exception of peanuts, are seen as good snacks

Good



Fresh, natural, unprocessed, guiltless

“Bad”



Instant pleasure, fattening, uncontrolled, delicious, fun



European Market Consumers: Lifestyle Shifts

Economic concerns changing shopping habits

Due to recent economic concerns, *consumers are reprioritizing* where they spend their money

This had led to the emergence of two seemingly conflicting trends in food:

- Consumers are growing more value conscious
 - However, this does *not* mean always choosing cheaper alternatives
- Consumer are trading up in some categories
 - Occurring in more *emotionally* meaningful categories (e.g., chocolate)
 - *“People are still looking for a little joy in their lives.”* – Manufacturer

The same consumers are trading up *and* trading down in different categories

- **64% of Tesco shoppers in the UK are buying from both the low-end and high-end private label lines**

Market	% Chosen Groceries on the Basis of Value*	% Trading up to Higher Priced Item*	% of HH Doing Both
France	29%	34%	36%
Germany	33%	30%	34%
Italy	34%	25%	32%
Netherlands	43%	24%	29%
Spain	28%	26%	28%
Sweden	29%	33%	26%
UK	38%	37%	25%
U.S.	42%	28%	23%

*% reporting doing this more vs. YAG.

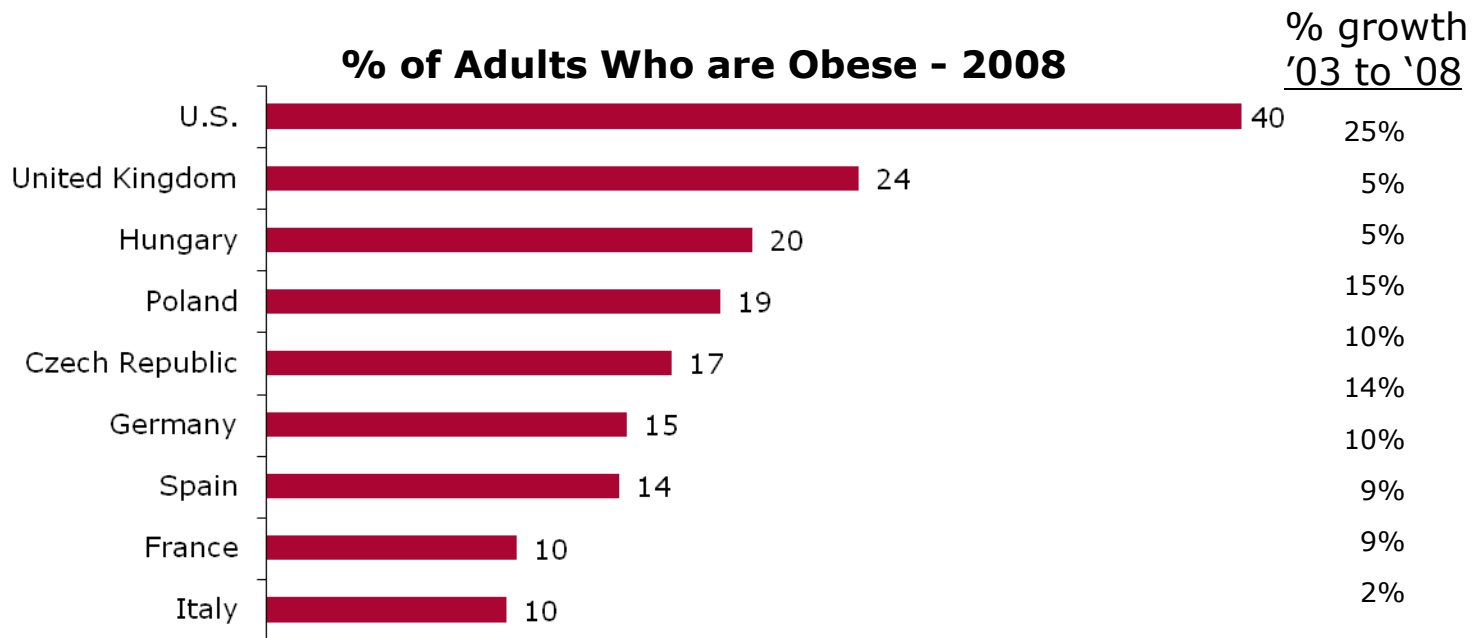


European Market Consumers: Health Concerns

Europeans getting bigger

Obesity on the rise

- Working longer hours, exercising less, less time to prepare meals, eating on the go = getting fat!
- France and Italy are still considerably less obese, but obesity is growing





European Market Consumers: Health Concerns

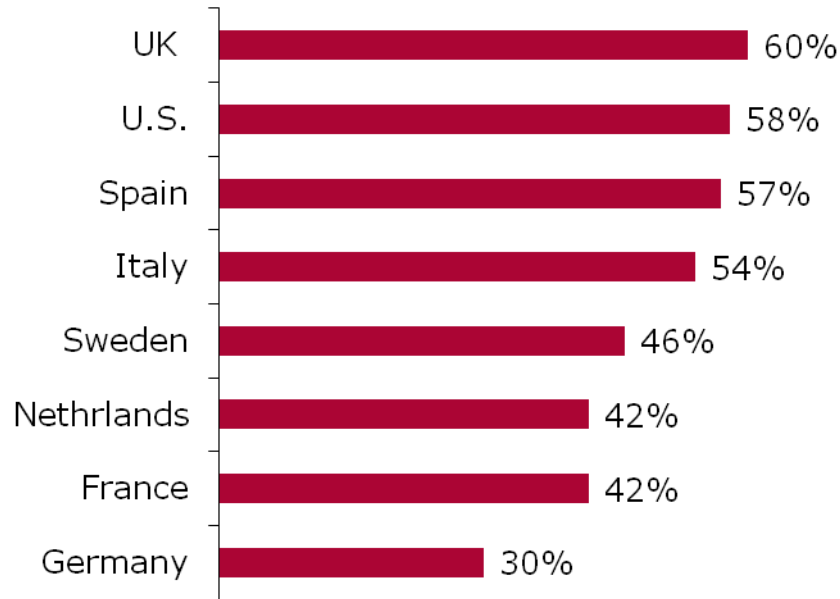
Eating for health

Health concerns are impacting the way Europeans shop and eat

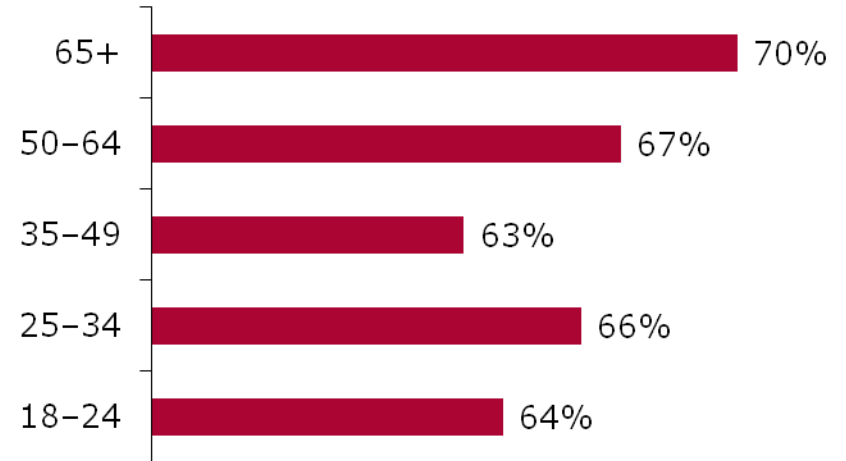
- Healthy eating is relevant across age groups

Percentage of Respondents Doing this More vs. Previous Year

Used Nutritional Information on Product Packaging to Help Make Food and Drink Choices



Taken Active Steps to Eat Healthier





European Market Consumers: Health Concerns

Manufacturers following

The number of new “healthy” food and beverage introductions in Europe have increased over ten-fold since 2002

“Healthy” Food and Beverage Introductions in Europe (# of SKUs)



Source: Datamonitor, keyword search of new food and non-alcoholic beverages for “healthy.”



Attitudes about Nuts and Almonds



Nuts: Pros and Cons

- **Significant positive associations with nuts, but one consistent caveat**

Nuts are healthy, BUT not too many!

Pros

- Tasty
- Natural
- Good fats, healthy oils
- Fun, social
- Easy, convenient, portable
- Pantry staple
- Familiar
- Energy booster
- Nutrient rich
- Satiety
- Usage versatility
- Cultural relevance

Cons

- Cause weight gain if eat too many, fattening





Nuts: Personalities

Though difficult, respondents were able to identify nut “personas” when pushed
There were consistencies in perceptions of the individual nuts across markets

Peanut



“Nothing special.”

“Common.”

“I think of kids when I think of peanuts.”

“I think of sports, and Americans.”

Walnut



“She’s lived a long life, so she must be healthy.”

“Good for the brain.”

“A lot of good oils.”

“They looked wrinkled.”

Hazelnut



“Older and not very fashionable.”

“When I see a dessert with hazelnuts, I think of my father.”

“I think they are a little old-fashioned and traditional.”

“Healthy and come in my cereal.”

Cashew



“They are high in fat. I would eat them in place of a meal.”

“Oooo – very tasty!”

“Cashews are trendy and high class.”

“Indulgent and pleasurable.”

Pistachio



“Something to eat with my beer or martini.”

“Outgoing and sporty.”

“I think of men and watching sports.”

“People like to eat them at parties.”

Almond



“Almonds are included in all diets, so they must be best.”

“I think of almonds as the healthiest nut.”

“My favorite.”

“I know almond oil is good for you.”

“She looks approachable and sophisticated.”

“Almond oil is in a lot of hair and skin products.”



European Context: Cultural Personalities

Almonds have a varied heritage across Europe



- Holidays
- Baked goods
- Marzipan



- Snacking
- Almond trees
- Family



Almonds: Current Uses and Perceptions

- **Despite low top-of-mind awareness, there are strong, inherent equities:**

Beauty

- Association with beauty products (skin and hair)

Healthiest nut

- Least oily

There are no negative perceptions of almonds specifically

- Taste perceptions are positive



Some association with beautiful, sophisticated, approachable, and natural

Almonds are currently a pantry staple

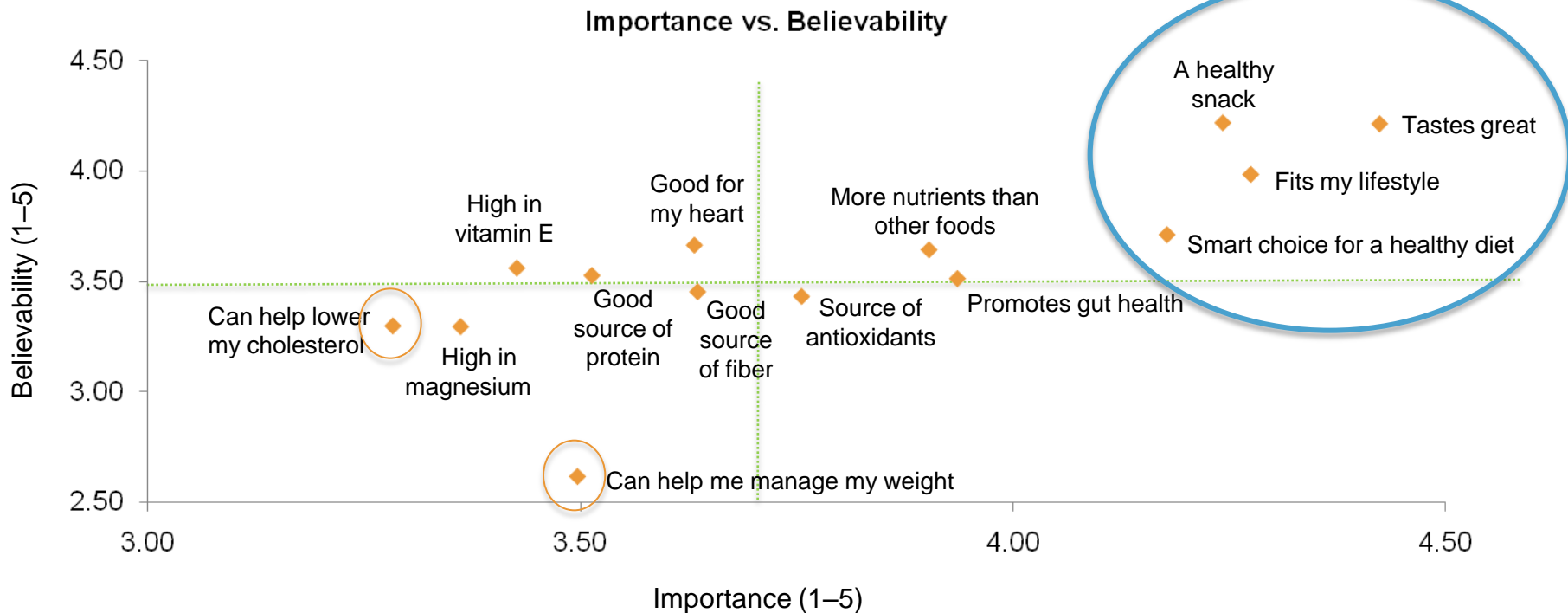
- Familiar with (and using) a variety of almond forms



Almonds: Messaging

- **The more general lifestyle-related almond messages were both most important and most believable**

Specific health attributes scored lower on both measures





Almonds: Almond Messaging

- **Almonds become truly newsworthy, compelling, and relevant when positioned as a healthy, convenient snack**
- **For many, this simple frame of reference change (from an ingredient for baking and holidays to a snack) fundamentally changes how they think of almonds**





Almonds: Almond Messaging

- The almond tin immediately expresses the power of almonds as a snack and a lifestyle food choice

Seeing the tin instantly changed how respondents thought about almonds

- Great solution for on-the-go snacking
- Quick energy boost
- Something I want with me
- Fun
- Stylish
- Contemporary
- New

The tin captures and brings to life the essence of almonds in a visual and physical way





Conclusions

Europe has the potential for significant growth!

The potential for growth can be driven by:

- **A common target audience with:**
 - **Common needs**
 - **Beliefs**
 - **Situations**
 - **Values**
- **Almonds are part of European culture and heritage**
- **Consumers like the taste of almonds—no significant barriers!**
- **Almonds are available in-store and in-pantry**
- **Positioning almonds as a healthy snack meets a major consumer need and aligns with powerful change forces**
 - **Convenience**
 - **Desire for simple, natural foods**
 - **Resistance to more processed, convenient solutions**
 - **Positioning almonds as a snack makes them more relevant and contemporary**



European Marketing Program Overview



European Marketing Program Overview

From these trends, as well as in-depth primary research, we have been able to redefine who our target is and how to reach her.

Who



European women, 35+,
health and food
involved*

What

- **Currently almonds have Low awareness and relevancy**
 - Almonds have important embedded equities that we can build from and own
 - Opportunity to position almonds as **a snack** to increase relevancy

How

- **UK:**
 - Integrated Consumer Public Relations, Advertising program
 - Outreach to Food Professionals and Health Professionals
- **France and Germany:**
 - Integrated consumer Public Relations program
 - Outreach to Food Professionals and Health Professionals

in UK: 9.9 M (22% of UK adult pop.; 41% of women)
in France: 6.2 M (10% of France adult pop.; 19% of women)
in Germany: 8.8 M (20% of adult German pop.; 38% of women)

*Physiographic attitude statements were used to determine health and food involvement

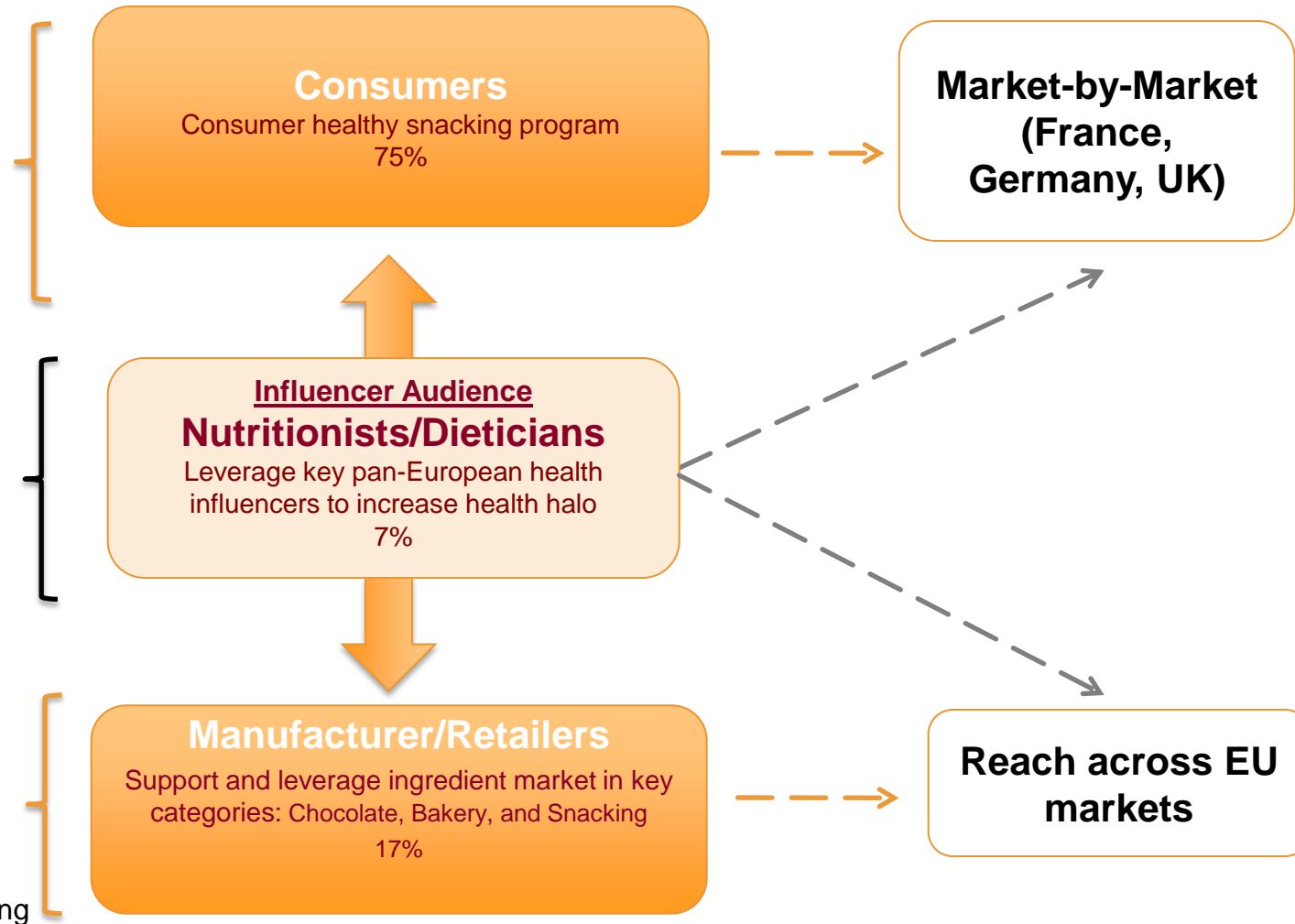


Communication Approach

- Print & online advertising (UK only) supported by PR campaign
- Celebrity spokesperson program
- Paid for media partnerships
- Active ongoing press Office
- E-Newsletter
- Snacking research

- Dietician/Nutri. Outreach
- Advisory Board
- E-Newsletter
- Health Claim
- European Congress on Obesity

- Press Office
- Innova partnership
- E-Newsletter
- FiE Planning
- Collateral development
- Food Professional advertising



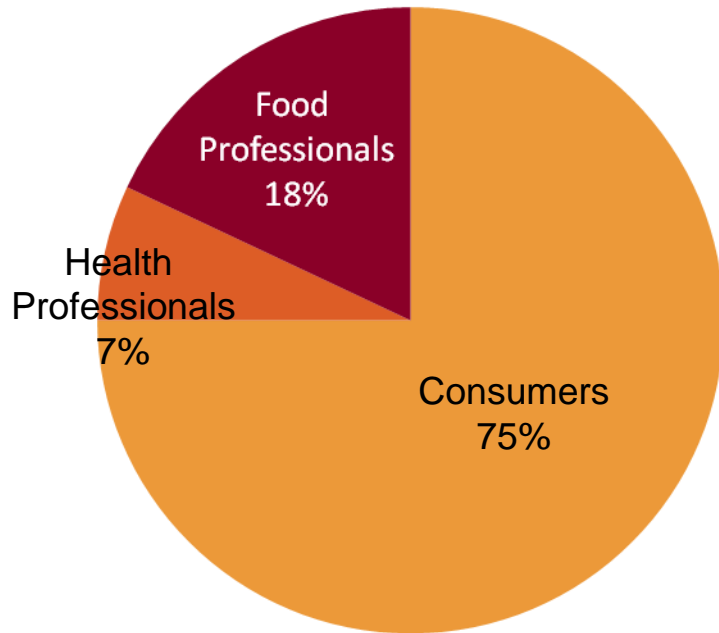


ABC Europe Investment

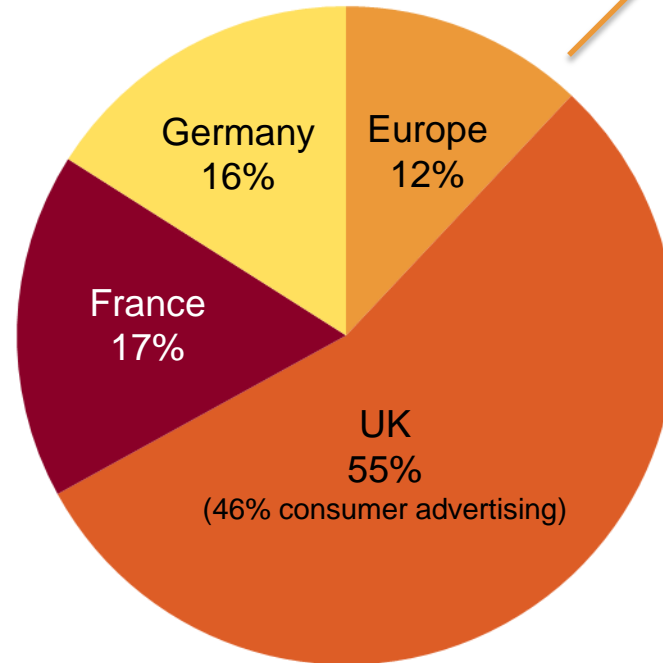
Total European Budget CY 2010-11 = \$4,286,600

European
Food
Professional
& Health
professional
programs

Budget by Target Audience



Budget by Market





New UK consumer advertising campaign: January 2011

Launch making snack almonds part of everyday life



Every girl needs her basics.

An umbrella is smart. Keys are critical. And while lip gloss is handy, none of them can save you from hunger. Only a tasty, crunchy handful of almonds has what it takes to tame those unnuhy grumbblings. Compared to other nuts, almonds are the highest source of 6 essential nutrients including protein and fibre*. Just what you need to get through even the most grueling day.

Learn more about almonds, the on-the-go essential, at AlmondBoard.co.uk



*Compared to other tree nuts, gram per gram, almonds are the highest source of protein, fibre, vitamin E, potassium, copper, and magnesium.



Gym bag must-haves.

The right snack is part of every great workout. So work in a handful of almonds. Their deliciously healthy crunch packs a higher source of 6 essential nutrients than any other nut*. And with a powerful protein punch, they're just what you need to keep going strong, all day long.

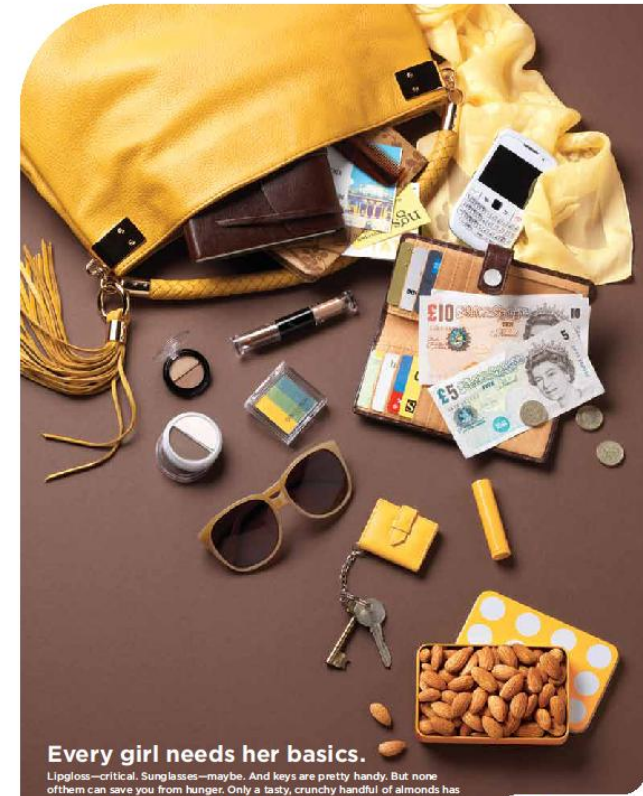
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New UK consumer advertising campaign: January 2011



Every girl needs her basics.

Lipgloss—critical. Sunglasses—maybe. And keys are pretty handy. But none of them can save you from hunger. Only a tasty, crunchy handful of almonds has what it takes to tame those unruly grumbles. Compared to other nuts, almonds are the highest source of 6 essential nutrients including protein and fibre*. Just what you need to get through even the most grueling day.

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Armed and ready.

Mums are prepared for everything. Even hunger. They know a handful of tasty, crunchy almonds is the perfect snack for them. Higher in 6 essential nutrients than any other nut, almonds have the fibre and protein it takes to stay strong, whatever the day brings.*

Learn more about almonds, the on-the-go essential, at AlmondBoard.co.uk



*Compared to other tree nuts, gram per gram, almonds are the highest source of protein, fibre, vitamin E, potassium, copper and magnesium.
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Success is in the bag.

A great snack is key to working smart. Answer the inevitable call of hunger with a handful of almonds. Higher in 6 essential nutrients than any other nut, they pack the tasty, satisfying, crunchy punch you need to keep going strong, wherever you are.*

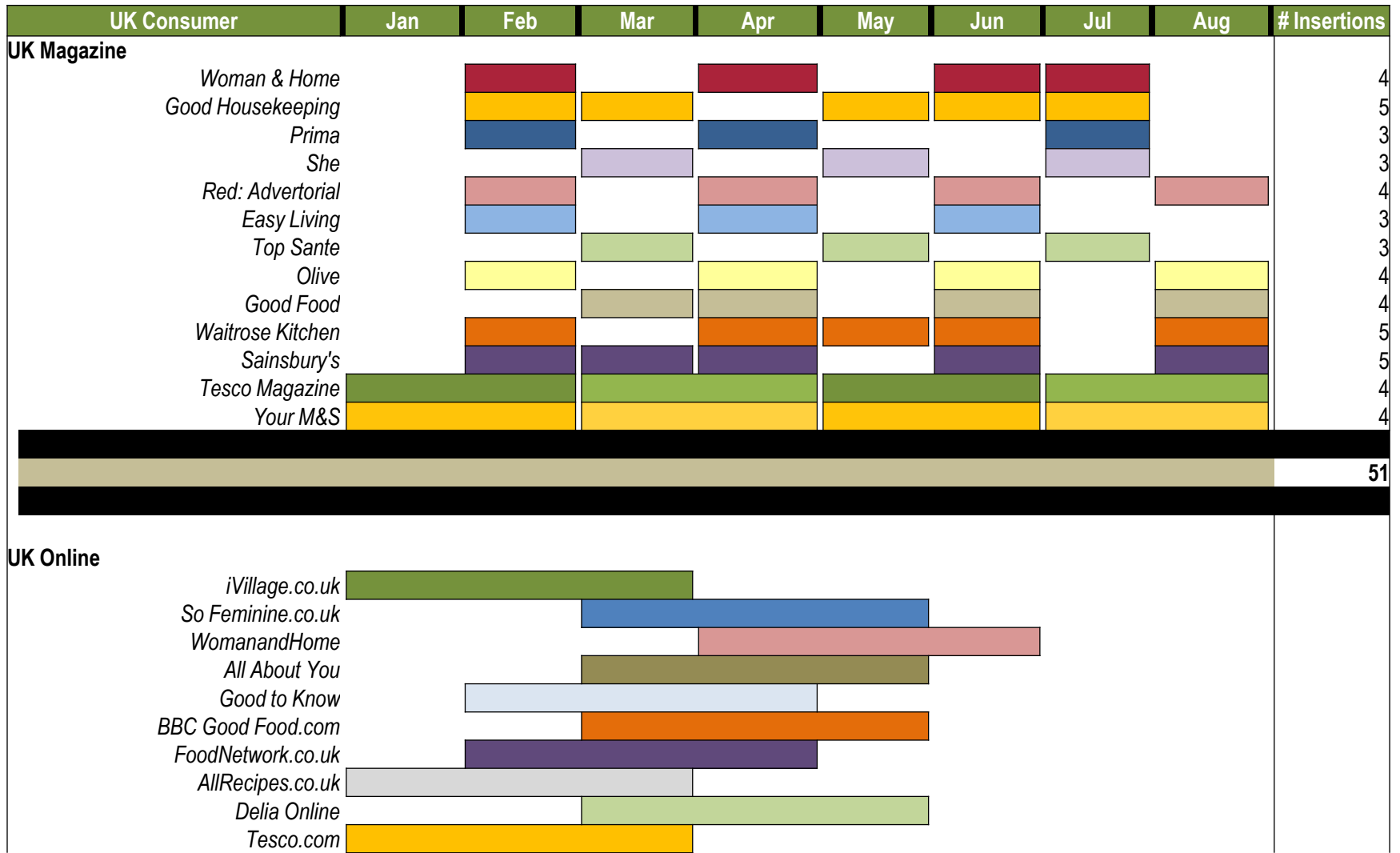
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FY 10-11 UK Consumer Media Flowchart





UK Advertising Supported by PR



Competitions

- News & features
- Consumer surveys
- Press materials



Expert Spokespeople



Media Partnerships



Celebrity Goody Bag Seeding



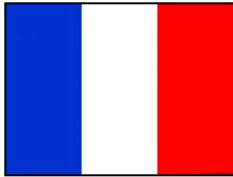
Brand Partnership



Retailer Engagement



Ongoing PR Programs in France & Germany (the highlights)



- Ongoing press office to generate media coverage
- Partnership with personal trainer Julie Ferrez
- Sponsorship of La Parisienne, the biggest women only mass-participation run in France.
- Partnership with AuFemin.com, the most important lifestyle website reaching 10 million French Janes – dedicated almond microsite



aufeminin.com



- Ongoing press office to generate media coverage
- Online advertorials
- Broadcast (radio) press kit (Broadcast via 25-30 radio stations)
- Direct outreach to publishing houses
- Brand partnerships

WomenWeb.de



Keep Up with
Newstalk ZB
HAWKES BAY • 1278AM



amazon.de

zalando



AlmondBoard.com in German, French and UK English



MANDEL-KONSUMENTEN

website wechseln ▾

sitemap | kontakt | profil-login



suchen



mandeln + lifestyle

gesundheit + ernährung

rezeptideen

über mandeln



2010
CLEVER
SNACKEN

Mandeln + Lifestyle **Clevere Snacks** Mandeln Tag für Tag Eine Handvoll am Tag Mandeln und ein gesundes Herz mehr



rezept des tages mehr

Heißer Mandel-Grog

Tipps zu Mandeln

Wie Sie den kleinen Hunger bis zum Mittagessen am besten überwinden? Eine Handvoll Mandeln eignet sich ideal zum Mitnehmen.



Mehr

Mandeln + Herzgesundheit

Hier finden Sie aktuelle Informationen, wie Mandeln Ihr Herz schützen können.



Mehr

Die perfekte Portion

Eine Handvoll am Tag



Mehr

eNews + Rezepte

Erfahren Sie das Neueste über kalifornische Mandeln.

Mehr



Thank You



Eat, Pray, Love Almonds in India

Becky Sereno, Almond Board of California





Today



India Overview

India's Consumers...

...Love Almonds

**Almond Board India Marketing Program
Overview**



India Overview



India by the Numbers

One fast growing market

- **GDP Growth**

2007: 7.4%

2008: 7.4%

2009: 9%

- **Per Capita GDP**

2007: \$2,800

2008: \$3,000

2009: \$3,200



The Sub-Continent

India is a large, diverse and fragmented market

Multiple religious and ethnic groups

West

1,200 dialects

Diverse Culture, Customs, Cuisine

North

28 states

22 languages

East

Economic disparity

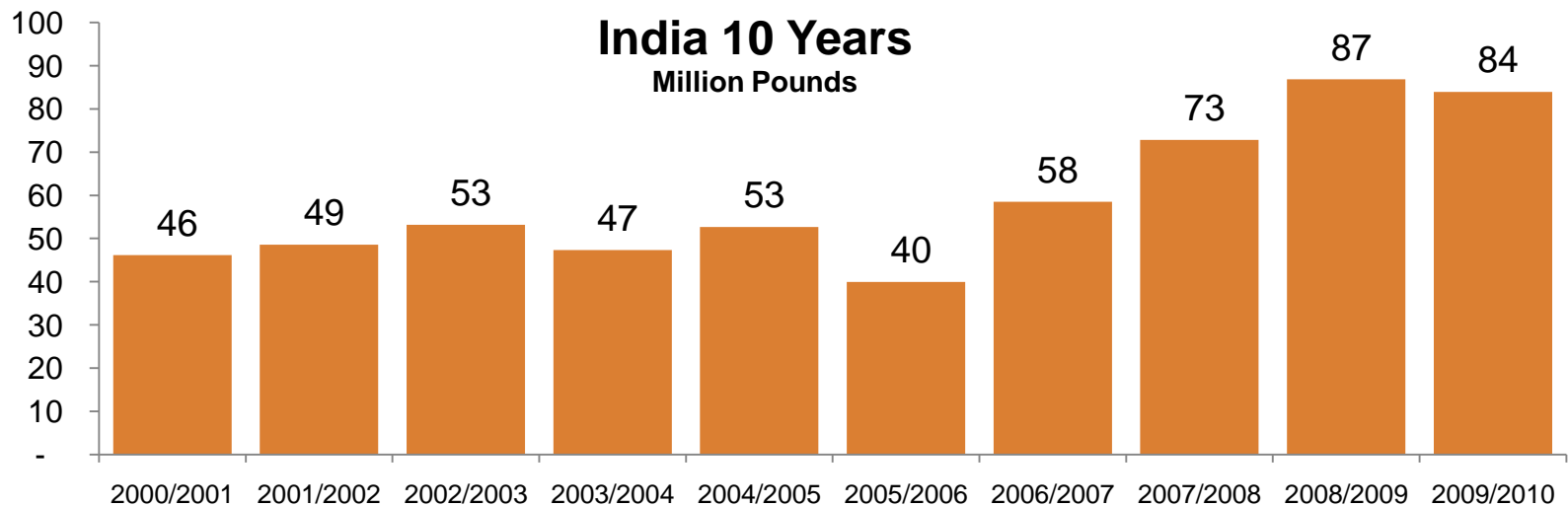
South





Almond Exports to India

- **California Almond exports over the past couple years have increased leaps and bounds**
- **End of FY 09/10 India was the 4th largest export market for California Almonds**





India's Consumers...



Young People are a Driving Force



700 million Indians are under age 35

550 million are under age 25

Over 25 million newborns per year

Influencers – peer group and workmates

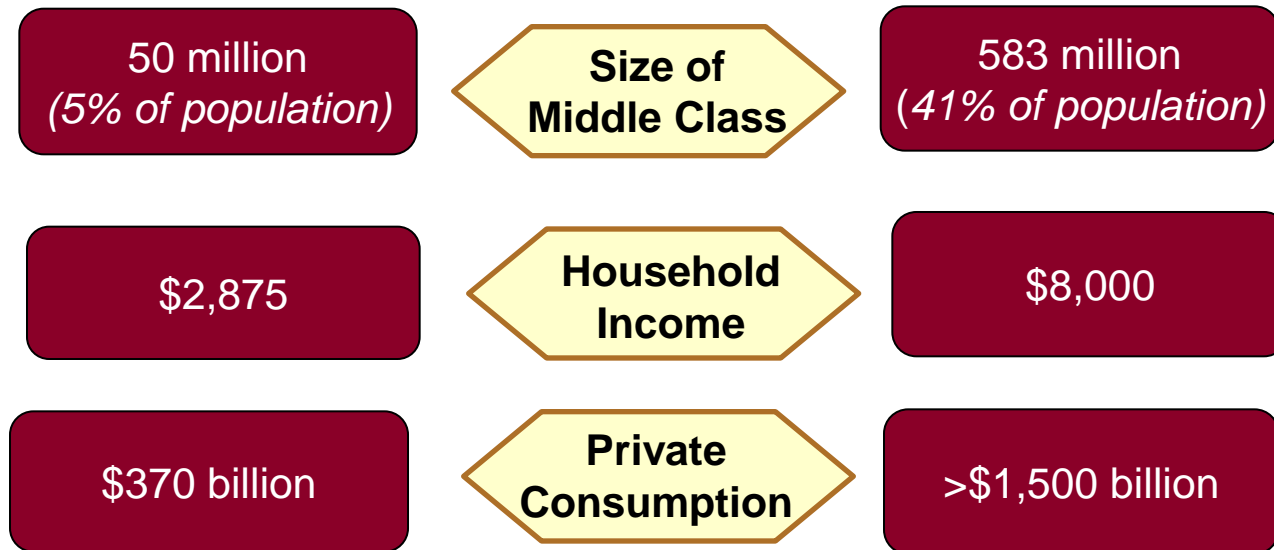
Spending power – \$175–\$1,000 per month

Consumption areas – food and clothing



Large and Increasing Middle Class

- **Working women contributing to larger workforce and more spending power for the family**
- **Western-style shopping centers, cafés, and fast food are cropping up all over urban centers**



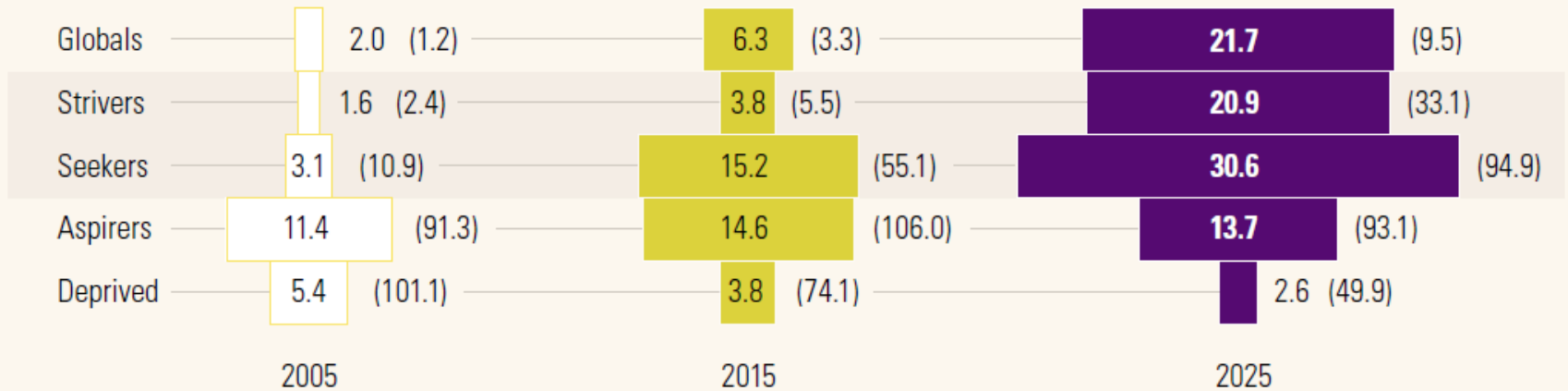


Large and Increasing Middle Class

The expanding middle

■ Middle class (xx.x) Number of households, millions

Aggregate disposable income by annual income bracket, trillion Indian rupees¹





Affluence Can Lead to Unhealthy Choices

Indian population facing health issues like CVD, obesity, type 2 diabetes

- Number of diabetic patients in India more than doubled from 19 million in 1995 to 40.9 million in 2007
- Projected to increase to 69.9 million by 2025
- Currently, up to 11 percent of India's urban population and 3 percent of rural population above the age of 15 have diabetes





Primary Target Consumer

Meet Neha!

- **Women, 30 – 40 years old, SEC A and B, university educated, from metro cities – Delhi/Mumbai/Bangalore**
- **Lifestyle conscious, sophisticated consumer, manager of household income**





A common set of *lifestyle* pressures and responsibilities

- Juggling home, children, elders, servants, sometimes career
- Keeping up with neighbors and peers

Her *role* as the woman of the house, who guides food purchasing and preparation as well as child rearing

- Empowered to make healthy choices

Common *values and attitudes*

- Will do anything for her children
- Balancing traditions and modern life



...Love Almonds



Consumer Research Investment

Qualitative:

- 18 Focus Groups:
 - Mother & Youngsters (19 – 23 years old)
- 6 Family Sessions with Grannies
- Conducted across 6 major cities

Quantitative:

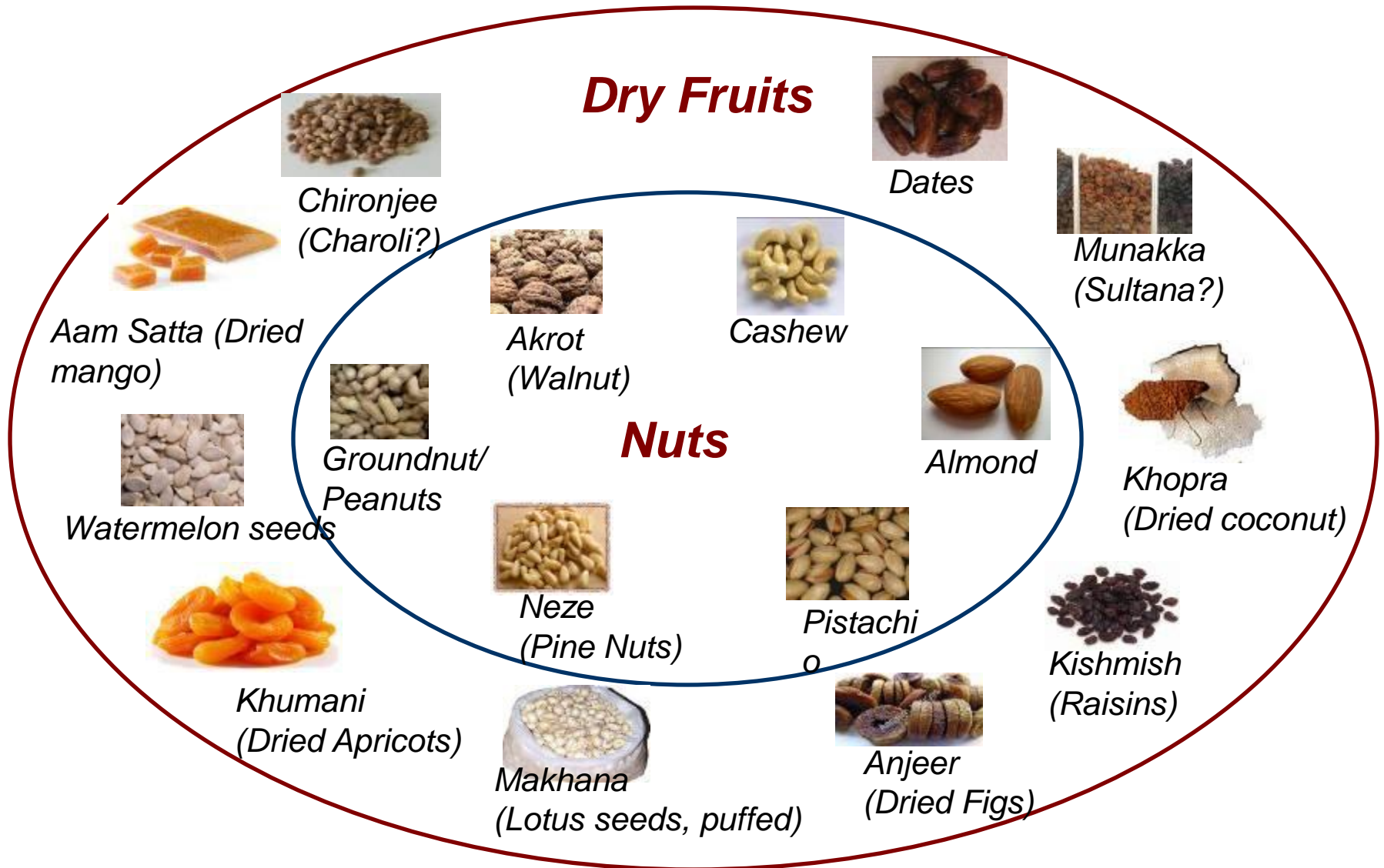
- Females and Males
- In-person, at-home interviews
- Conducted across 12 major cities



Field Work Conducted: May – June 2008

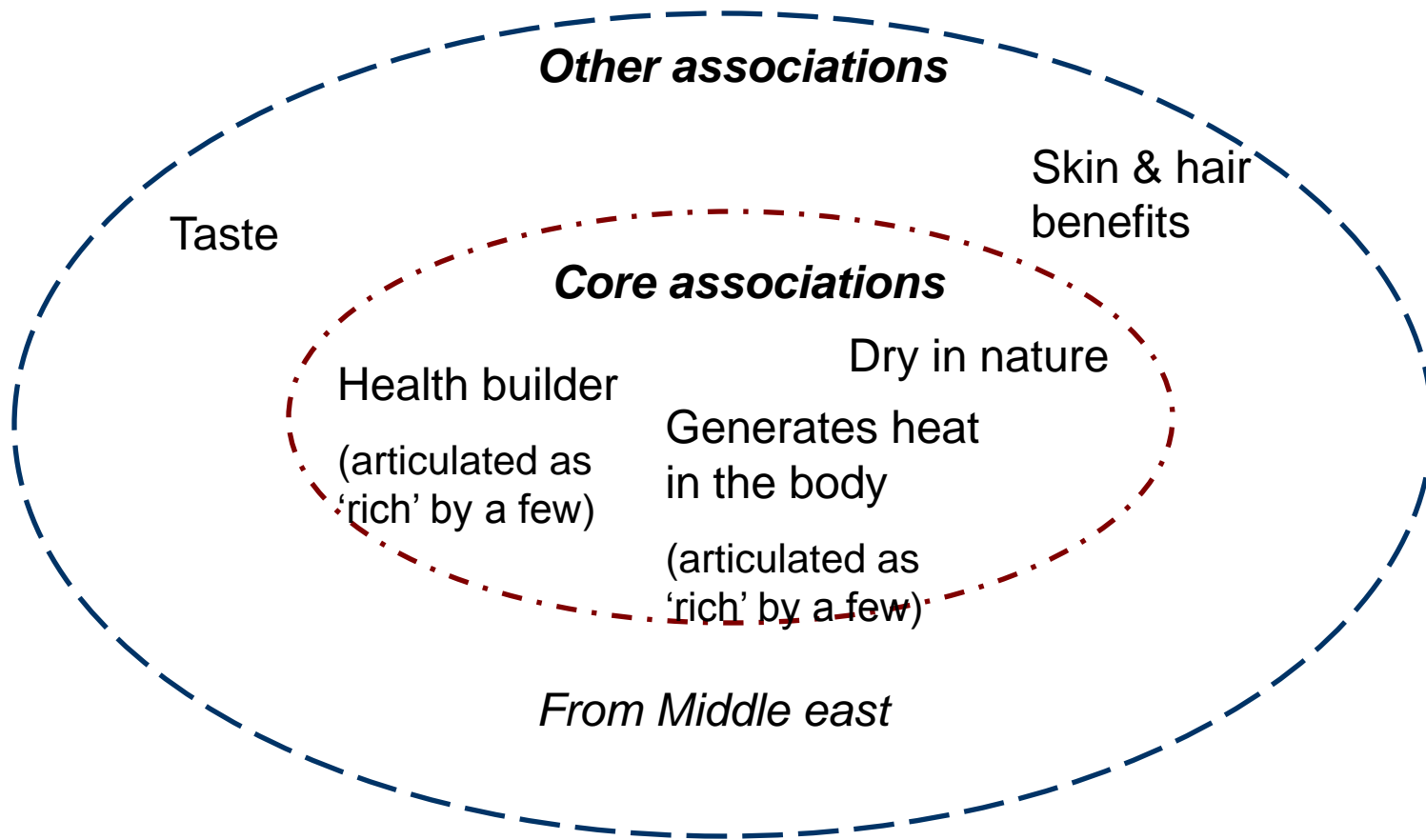


Nuts or Dry Fruits?





Associations with dry fruits

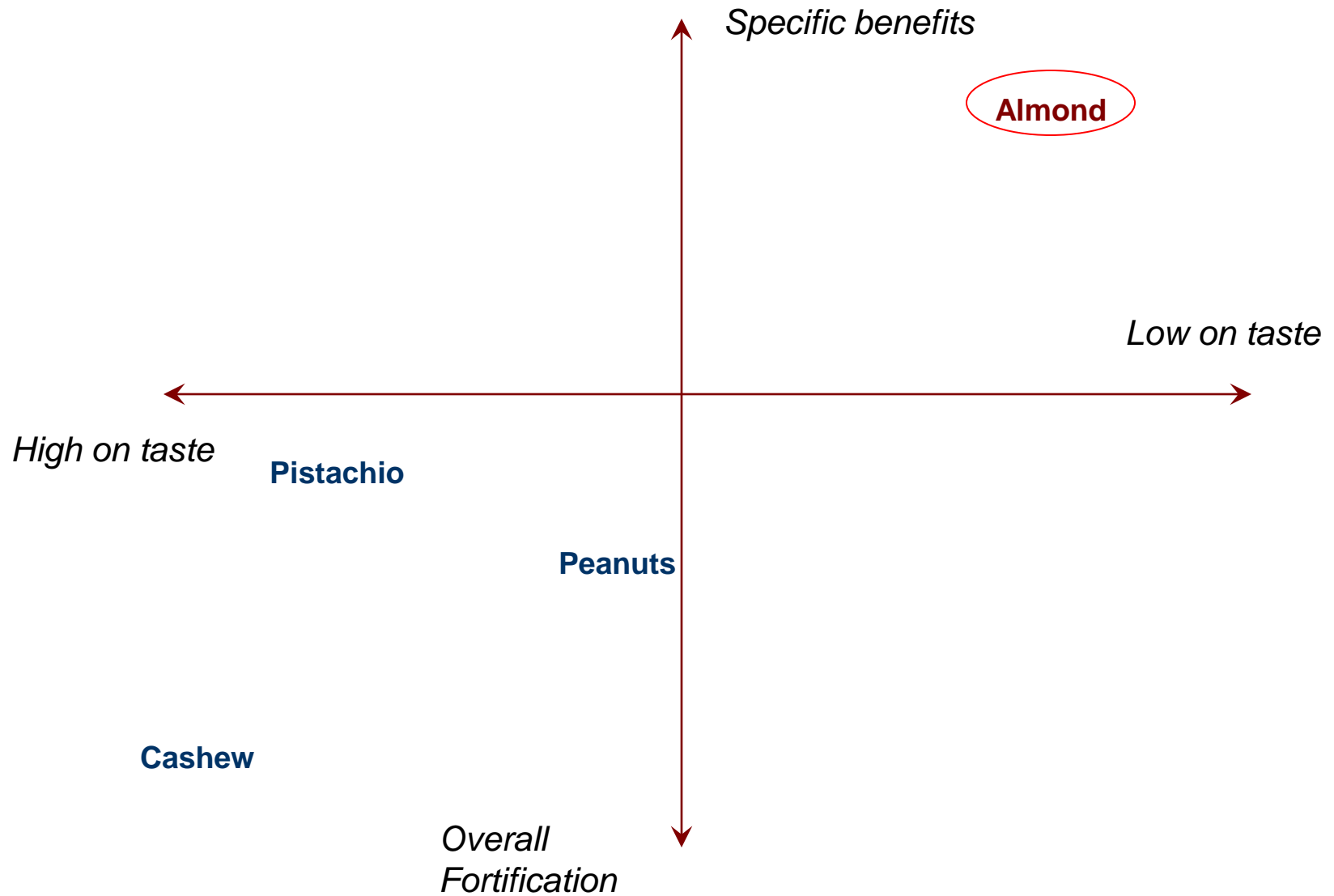


Dry fruits as a category seen to be health giving... as being 'good for you'

Only nuts branch off into specific health benefits... the other still operate in the generalist sphere



Perceptually plotting Almonds: taste vs specific health benefits





Almond Findings at a Glance

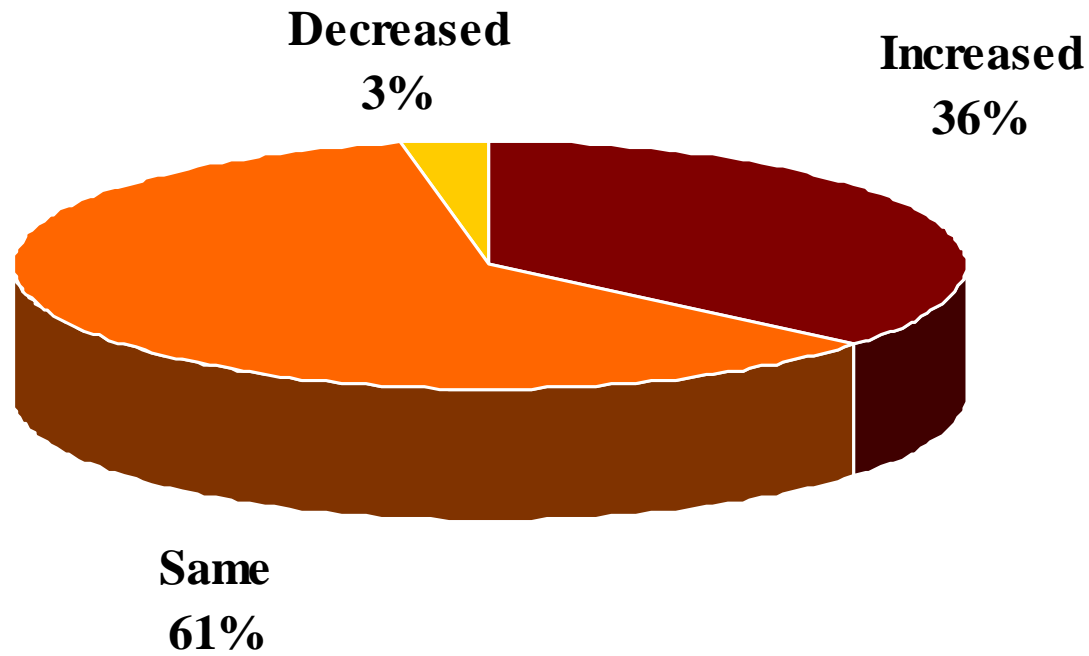


- Almonds are the ***first*** dried fruit women think of on a country-level basis
- Almonds are rated as the ***favorite*** dried fruit by 47% of women consumers in India, the **number one answer**
- Almonds are also rated by 64% of women surveyed as the ***most healthy*** dried fruit, again, **the number one answer**



Change in Consumption over Previous Year

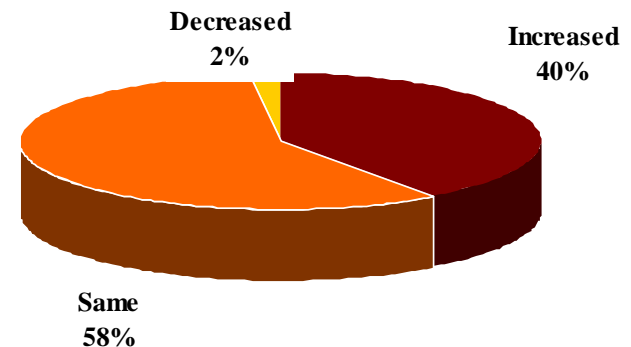
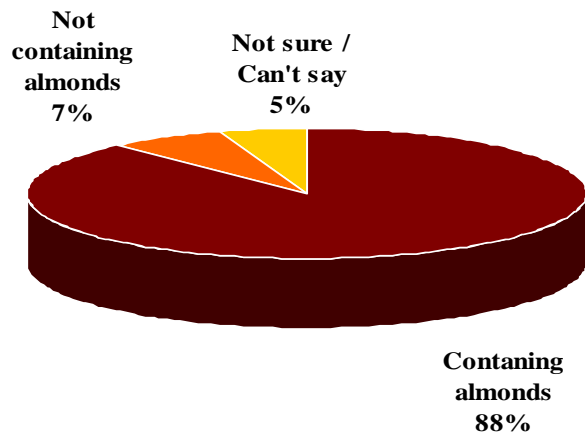
36% of female consumers reported they have consumed more almonds in the past year





Purchase Behavior

- **88% of female consumers report they prefer a product containing almonds over a similar product without almonds**
- **40% report they will increase their purchases of almonds in the next 12 months**





Still room for growth

While almonds are popular and products are present, there is opportunity to more strongly associate almonds with snacking in the daily diet and provide a compelling reasons to seek them out every day, throughout the year





Almond Board India Marketing Program Overview



Strategic Approach to Reach Nehas

Objective

- Increase consumption frequency of California Almonds

Desired Behavior

- Incorporate greater and more regular consumption of almonds into her and her family's daily life beyond just certain occasions and seasons.

Communications Strategy

- Build upon existing traditions of consumption while providing new reasons to enjoy almonds for the good life as part of today's contemporary lifestyle
- Appeal to emotions and aspiration of living a full, healthy, good quality life



Holistic Consumer Campaign Around Celebrity Ambassador



Print Advertorials

Fun, Family and Almonds for Winter

Winters and almonds make a perfect combination for Karisma Kapoor



Nutrient-Rich Almonds

Irrespective of the weather, almonds are a great way to fill your stomach and get your dose of nutrition. There's a lot of goodness packed inside a handful of almonds. You may be surprised by just how much.

An excellent source of vitamin E and a good source of fiber, copper, magnesium, phosphorus and riboflavin, this cholesterol-free nut is also a good source of mono-saturated fat. The six grams of protein in its one serving also sustains me throughout the day. Almonds are known to help control blood sugar levels and protect against diabetes. This is one accompaniment I never leave my home without, especially in winters. I munch on it whenever I am hungry, without feeling guilty.

Going Nuts

We Kapoorans are known to be foodies. But at the same time, we are health-conscious people. Nuts, especially almonds, are an essential part of our diet. Through my childhood, my mother would give me almonds every morning before going to school. It was a ritual I grew up with and continue till date. When someone compliments my skin and fitness, I tell them it is all to do with growing up eating the right thing. Today, as a mother, I follow the same for my kids.

Our festivities too are incomplete without nuts. I love gifting people health-smart nuts like almonds on all occasions. It is a delicious and healthy way to spread joy. For a guilt-free, tasteful winter this year, switch over to a scrumptious and non-greasy snack option like almonds and eat your way to good health.



It is that time of the year again! I love winter like no other season. The fog in the air, the misty mornings and foggy, mysterious evenings I like everything that comes along with this season. Food is another reason I love this season. And who can resist the festive season brings with it, Diwali, Christmas, New Year, so many holidays!

Come winter, and the spotlight falls on dry fruit baskets, including healthy nuts like almonds. In almost every household in India, nuts integrate with the daily routine. Given its versatility, almonds are not only a perfect item to snack on but when added to a dish, it brings a crunchiness to the entire meal.

Almonds. A handful of goodness
Weight Wise • Heart Healthy • Nutrient Dense • Antioxidant Rich

All-time favourite almonds

- There's nothing like a great start to your day. Kick-start with some nutrient-filled almonds.
- Almonds are an ideal fitness companion.
- Grab a handful after your gym or yoga session.
- Your evening chat with family just got crisper with sweet or savory almonds.
- A cozy winter heater is just incomplete without something to munch - what better than almonds?
- Friends coming home for a party? Add flavor to your meal with some interesting almond starters.
- Looking for a light yet power-packed dinner? Almonds are the way to go.

One Woman, Many Roles



There are many demands to a woman's life, and smiling through all of them needs patience, poise, and a handful of almonds!

As a woman, you are pulled in several different directions all the time. The many different roles a woman has to play — mother, professional, role model, beauty icon and more — require her to be at the top of her game all the time. With a daily handful of almonds, she can do just that.

Mom knows best

As a mother, the care of the family is in the woman's hands. But we all know getting kids to eat healthily is an uphill task. Mothers are faced with the perpetual dilemma of balancing taste for nutrition. Well, this quest ends with almonds, which are crunchy, tasty and power-packed with nutrients. What's more, they blend beautifully with versatile flavors of your choice, plus are convenient for kids to munch at school or to grab as an afternoon snack. So if you are a mom who knows best... you know almonds!



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Almonds are Amazing

Do you know why?



Quick Facts

- The ancient Romans believed almonds were a fertility charm and so showered newborns with it.
- The Bible's Book of Numbers tells of Aaron's rod that blossomed and bore almonds as a symbol to represent divine approval.
- U.S. President Clinton's snack of choice was Cannon-glazed almonds at both the 1993 and the 1997 inaugurations.

The classic dusky Indian beauty is most certainly almond-eyed, and the very word 'badaam' conjures up visions of health, beauty, food and a lifestyle that is very 'shabi' to say the least. But make no mistake, almonds are not a rich man's indulgence; they are woven into the very fabric of Indian cuisine, even more so in Indian life itself!

The reasons are simple. For one, this scrumptious nut is packed with nutrients and complements virtually every food with its characteristic mild taste! Again, almonds are rich in quality nutrients such as protein and monounsaturated fat, and research reveals that contrary to common belief, eating almonds does not necessarily lead to weight gain. Rather, almonds play a crucial role in weight management because of their effect on appetite satiety!

In fact, here are some more interesting facts about the goodness of almonds, that you probably did not know!

Almonds can be used in various ways

Sliced, diced, roasted, blanched or flavored — you can munch on almonds any way you like. Eating almonds with their brown skin also provides dietary fiber and powerful antioxidants that help defend your body from free radicals. What's more, a handful of almonds a day is a perfect, healthy snack for the whole family, whether on the go or at play!

Almonds can be eaten throughout the year

Almonds are welcome anytime, be it any ordinary day, special occasion or season. You can easily carry them



Almonds. A handful of goodness

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Almonds may help protect against lifestyle diseases

California Almonds are cholesterol-free and low in saturated fat, making them a tempting option for snacker meals and snacks, and research is now showing that they may also help maintain a healthy heart with healthy cholesterol levels. Almonds may help reduce LDL, or "bad" cholesterol and increase the HDL, "good" cholesterol as part of a diet low in saturated fat.

So these little nuts have more health secrets packed in them than you can imagine. Next time you think of a snack between meals or just have a craving for something crunchy, tasty and healthy... THINK ALMONDS!

Almonds: The Delicious Way To A Healthy Life



From the moment we get up, the demands on our strength—physical and mental—are constant. Whether you are a working professional, a mother of two like me, or indeed a student, you need to be strong from the inside to give out a healthy glow outside. And that is the reason why almonds are my food of choice.

From head-to-toe, almonds take care of every aspect of my body. Containing protein, fibre, vitamin E, calcium, antioxidants and potassium, almonds don't just support your efforts to look and feel great but are delicious in various forms. Now, who doesn't want health packed in tasty crunches!

Almonds are a great snack that fill you up, but don't let your day. With an irresistible crunch and light flavor, almonds are the perfect on-the-go snack to enjoy at any time of the day.

Here is my favourite appetizer recipe—with a handful of almonds. You could look at it as an appetizer before a meal or eat it whenever you want. The recipe is easy to make, and of course, simply lip-smacking. I hope you enjoy my choice.

Basil-Pesto Almonds

For healthy snacking, as appetizer, or as part of your kid's offer!

- Ingredients**
- 2 egg whites
 - 10g packed whole basil leaves
 - 400g whole natural almonds
 - 25g freshly-grated Parmesan cheese
 - 1 teaspoon salt
 - 1/2 teaspoon garlic powder
- Servings:** 8-10

Preparation

Preheat the oven to 110°C. Line a large baking sheet with parchment paper and set aside. Combine the egg whites and basil in a blender; blend on low speed until the mixture is pureed. Toss egg white mixture with the almonds. Drain in a colander. Soak together cheese salt and garlic powder in a



- Nutty Facts**
- Almonds are a good source of Vitamin E, protein and fibre, and contain calcium, riboflavin and niacin
 - Packed with antioxidants, almonds support natural anti-aging therapy.
 - Almonds are cholesterol free and help maintain a healthy heart

Now wasn't this a great replacement for those calorie-laden treats that add to your waistline? Whether you want to keep it away as a snack or have it as part of your meal, this preparation will leave you and your kids asking for more. And with the goodness of almond packed in it, there is no reason to say no!

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Print and Television Advertising



General Festival Atmosphere



Diwali-Focused

3 TV spots to showcase gifting leading up to and during Diwali and general festival/winter consumption post-Diwali



Thank You



Wrap-Up, Discussion and Q&A



Rustler Giveaway

Register to Win the New Holland Rustler!



Fill out your entry form and drop it
at the **Garton Tractor booth #81** or
SmartCube Packaging System
booth #82 in the Exhibit Hall

Drawing will be held **Thursday, December 9** at
the **12:00 pm luncheon**.

Drawing is open to almond growers. *Growers
must be present to win.*

Name	<input type="text"/>
Company	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>



Growers:

Win a New Holland Rustler
from **Garton Tractor** and
SmartCube Packaging
System. Complete your
entry form and return to
booth #81 or #82.



Next Session at 9:50 am:

**Modern Rootstocks for
Almonds by Progressive
Genetic Group**

Grand Ballroom

Moderated by Richard Waycott



Refreshment Sponsor





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Sessions at 1:30 pm

Leveraging Consumer Demand to Become an Essential Ingredient in Arbor Theater

Pollination Updates in Grand Ballroom



growing
ADVANTAGE

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20
10

38th Annual
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