



How Almonds Became the #1 Nut in Europe

December 8, 2016



How Almonds Became the #1 Nut in Europe

Stacey Humble, Almond Board of California (Moderator)

Dariela Roffe-Rackind, Almond Board of California

Rob Renegar, Sterling-Rice Group



A photograph showing a glass jar filled with almonds on the right side, and a small glass dish containing a small amount of almond oil on the left side. The background is a warm, golden-yellow color.

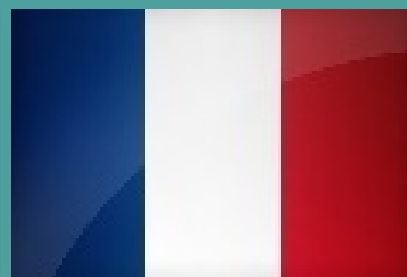
**Stacey Humble,
Almond Board of California**



Dariela Roffe-Rackind,
Almond Board of California
and
Rob Renegar,
Sterling-Rice Group



HOW ALMONDS BECAME THE #1 NUT IN EUROPE...





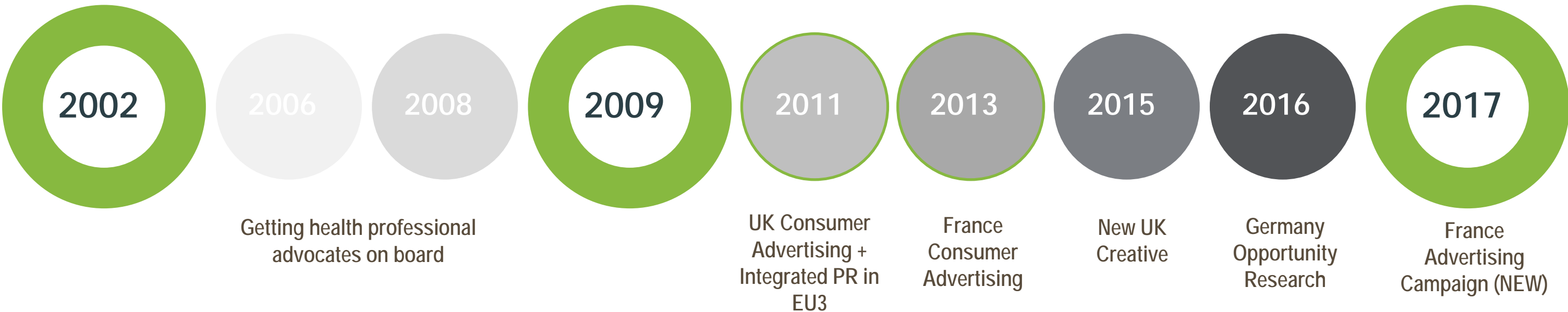
THE STORY SO FAR...

Over 15 years invested in public relations (and advertising) in the European market to raise awareness and demand for almonds

SNACKING STRATEGY

Almonds as an essential ingredient

From disease prevention to wellness & lifestyle





THE INGREDIENT STORY IN EUROPE...





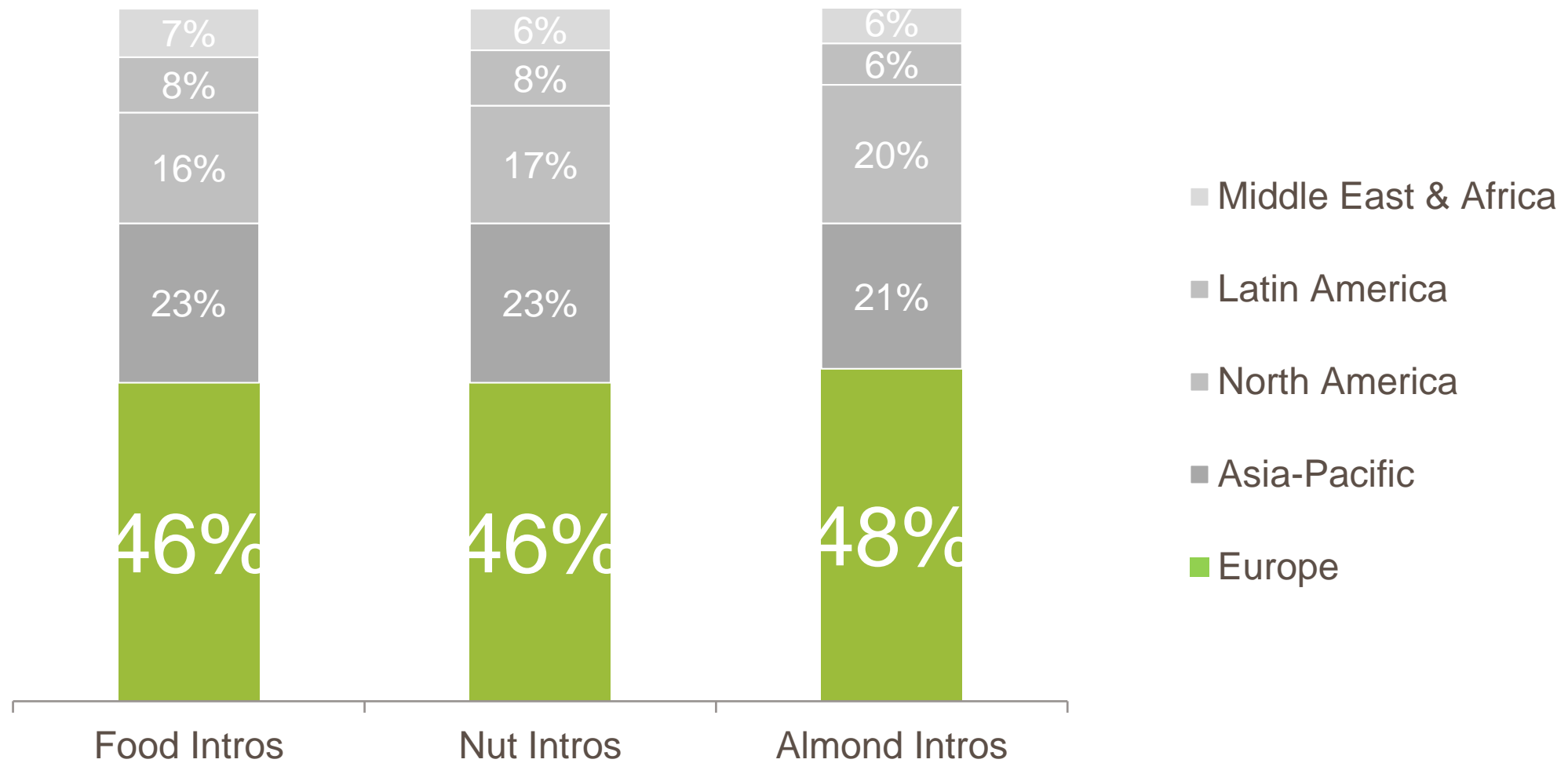
ALMONDS HAVE A
STRONG
HERITAGE IN
EUROPE



**But there is
tremendous
innovation in the
ingredient market in
Europe**

EUROPE DRIVES THE LARGEST SHARE OF INTRODUCTIONS ACROSS THE GLOBE

2015 Global Food, Nut, and Almond Introductions
Regional Share



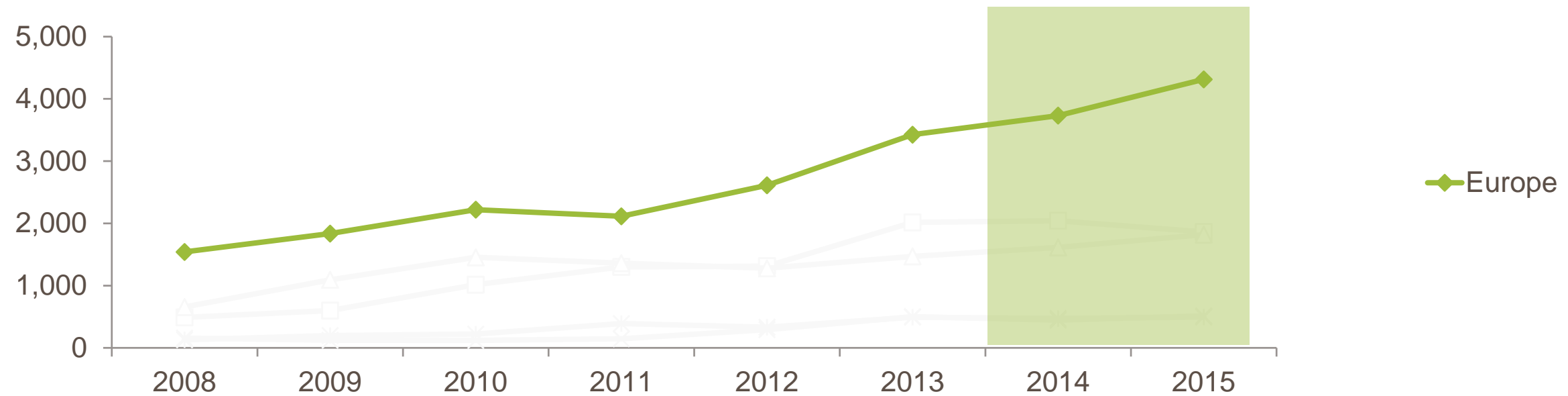
EUROPE INTRODUCED MORE THAN 2X AS MANY ALMOND PRODUCTS AS ANY OTHER REGION

2015 Global Food, Nut, and Almond Introductions: Regional Share

| Region | Food Intros | Nut Intros | Almond Intros | Almond's Share of Region's Food Intros | Almond's Share of Region's Nut Intros |
|----------------------|---------------|--------------|---------------|--|---------------------------------------|
| EUROPE | 93,966 | 9,956 | 4,313 | 11% | 43% |
| Asia-Pacific | 47,305 | 5,016 | 1,862 | 11% | 37% |
| North America | 31,462 | 3,643 | 1,820 | 12% | 50% |
| Latin America | 16,010 | 1,341 | 514 | 8% | 38% |
| Middle East & Africa | 13,992 | 1,650 | 496 | 12% | 30% |
| Total | 202,735 | 21,606 | 9,005 | 11% | 42% |

ALMOND INTRODUCTIONS IN EUROPE INCREASED BY 16% FROM 2014 TO 2015

Global Almond Introductions by Region
2008–2015



FOR THE FIRST TIME EVER, ALMONDS OVERTOOK HAZELNUTS FOR THE #1 POSITION IN EUROPE!

Introductions within Each Region by Nut Type (and change % compared to 2014)

| | Europe | | Asia-Pacific | | North America | | Latin America | | Middle East & Africa | | Global Totals | |
|---------------|--------------|-------------|--------------|------------|---------------|-------------|---------------|-------------|----------------------|------------|---------------|------------|
| Almond | 4,313 | +16% | 1,862 | -9% | 1,820 | +13% | 514 | +15% | 496 | +5% | 9,005 | +8% |
| Hazelnut | 4,308 | 0% | 740 | +5% | 341 | +28% | 257 | +40% | 710 | -4% | 6,356 | +3% |
| Peanut | 1,598 | +1% | 1,714 | -11% | 1,159 | -6% | 507 | -5% | 338 | -18% | 5,316 | -7% |
| Cashew | 1,187 | +9% | 920 | -3% | 589 | +20% | 193 | +18% | 174 | -1% | 3,003 | 5% |
| Walnut | 625 | -4% | 368 | -19% | 326 | -2% | 137 | +14% | 59 | -23% | 1,515 | -7% |
| Pecan | 307 | +10% | 122 | -23% | 427 | +36% | 42 | -16% | 51 | -32% | 949 | +9% |
| Pistachio | 480 | +6% | 201 | -26% | 96 | -20% | 19 | -42% | 130 | -17% | 926 | -10% |
| Macadamia | 125 | -8% | 201 | -1% | 104 | +39% | 34 | +13% | 55 | +129% | 519 | +11% |
| Mixed* | 74 | -44% | 23 | -77% | 18 | -67% | 3 | -80% | 7 | -81% | 125 | -63% |

*Mixed Nuts include non specified and mixed nuts.

EUROPE LED ALL OTHER REGIONS IN 4 OF THE 5 TOP CATEGORIES FOR ALMOND INTRODUCTIONS, INCLUDING SNACKS!

| Almond Introductions within Each Category by Region | | | | | | |
|---|---------------|------------|------------|------------|------------|------------------------------------|
| | Confectionery | Bakery | Snacks | Bars | Cereals | Total % of Almond Intros by Region |
| Europe | 59% | 55% | 38% | 35% | 40% | 48% |
| Asia-Pacific | 17% | 26% | 29% | 15% | 23% | 21% |
| North America | 13% | 10% | 21% | 41% | 22% | 20% |
| Latin America | 5% | 5% | 6% | 5% | 8% | 6% |
| Middle East & Africa | 7% | 5% | 6% | 4% | 7% | 6% |
| Total | 100% | 100% | 100% | 100% | 100% | 100% |
| | 2,364 | 1,613 | 1,601 | 1,312 | 762 | 9,005 |



CONSUMER FOCUS FROM INGREDIENT USAGE... TO SNACKING!



- Societal shifts in Europe teed-up the perfect opportunity for almonds to capture the growing snacking market
- Greater demand for convenient, on-the-go, natural, and unprocessed snack foods

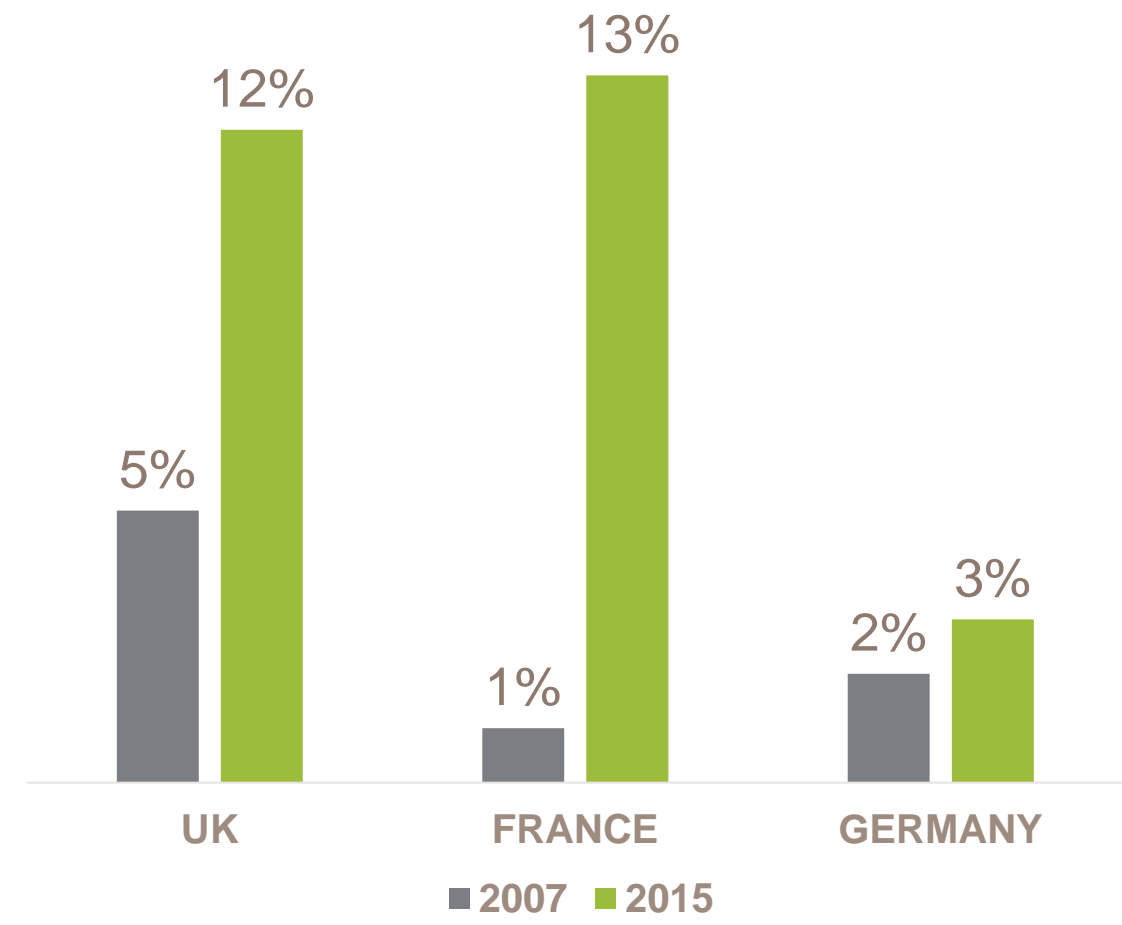
EXTENSIVE RESEARCH OVER THE PAST FOUR YEARS HAS UNCOVERED IMPORTANT DIFFERENCES IN MARKET DYNAMICS.



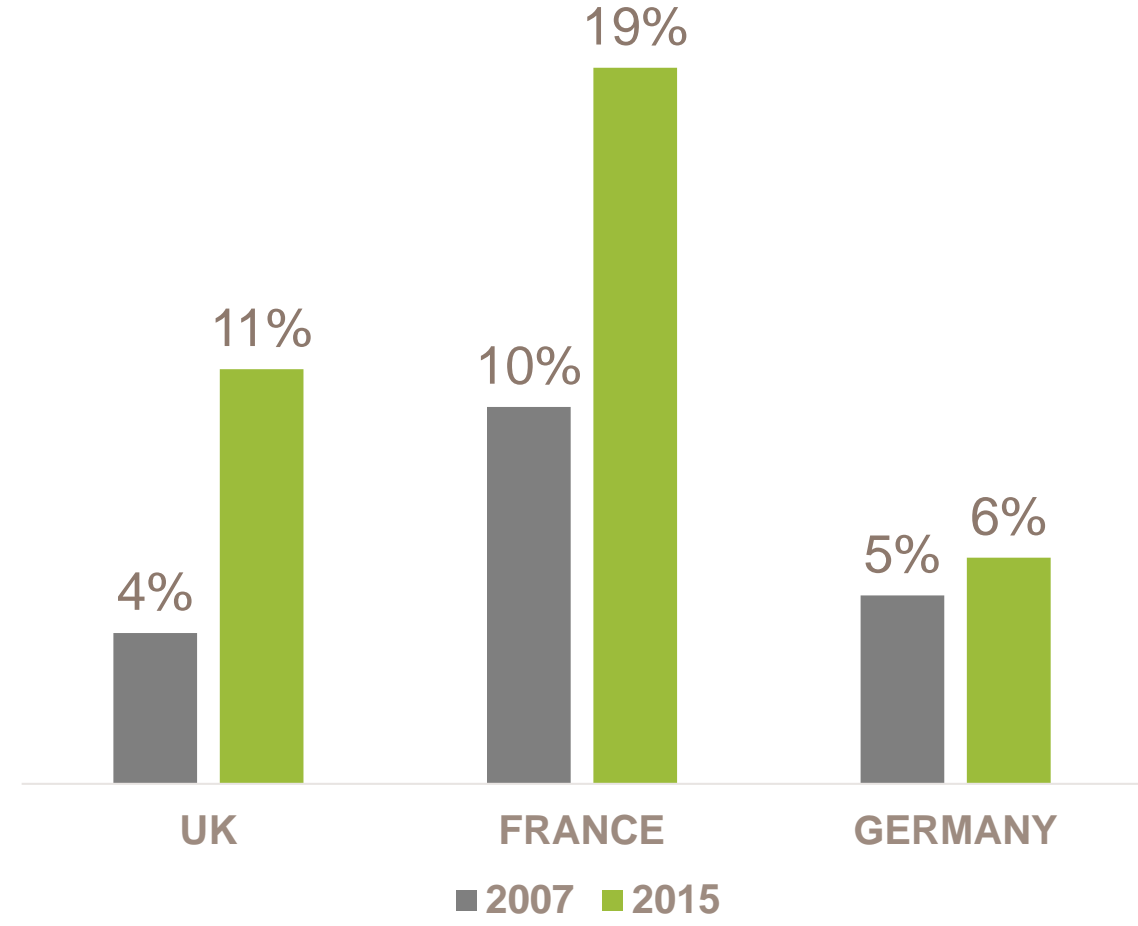


IMPACT OF LONG-TERM STRATEGY IN UK AND FRANCE & MORE WORK/INVESTMENT NEEDED IN GERMANY

Top Of Mind Awareness (AAU)



Snack Association (AAU)





UNITED KINGDOM

Almond Board of California



THE CHALLENGE



AN EVOLVING TARGET AUDIENCE

- Younger.
- More focused on health and weight management than ever before.
- “I love snacking, but I feel guilty about it because I don’t want to gain weight.”




A MISCONCEPTION ABOUT ALMONDS:

"I should only eat 6 almonds a day."

"Almonds are high in calories."

"I can eat 23 almonds for 160 calories?! REALLY?!"



A photograph of an almond orchard with green leaves and brown almond husks. A semi-transparent red rectangular box is centered over the image, containing white text. The text is arranged in several lines, with the largest text at the top and bottom, and a smaller line of text in the middle.

**THOUGH
AWARENESS OF
ALMONDS AS A
SNACK HAS
DOUBLED**

2015 Top-of-mind awareness = 12%

**SINCE 2007,
IT IS STILL**

ALMONDS ONLY MAKE UP 5.7% OF CATEGORY SHARE FOR SNACK NUT SALES.

Peanuts and cashews still dominate the UK market.





HOW TO FURTHER DRIVE DEMAND FOR ALMONDS AS SNACK...

Raise awareness of the health benefits of almonds and expand our target audience

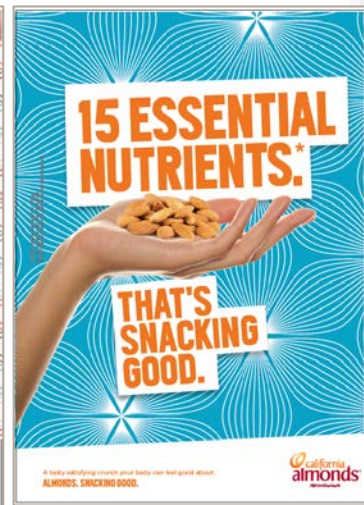
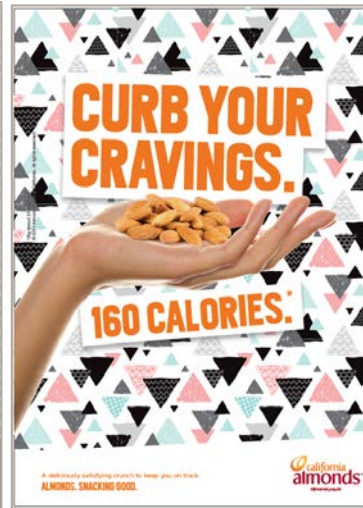
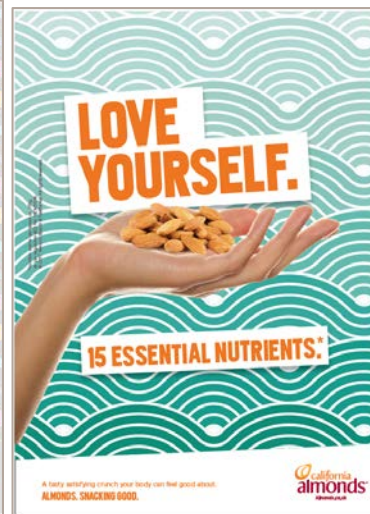
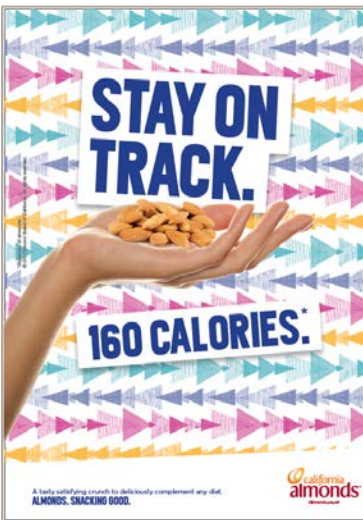


REFINED TARGET AUDIENCE

Expanded to include Millennial almonds lovers (W/25-34)

LAUNCHED A NEW ADVERTISING CAMPAIGN

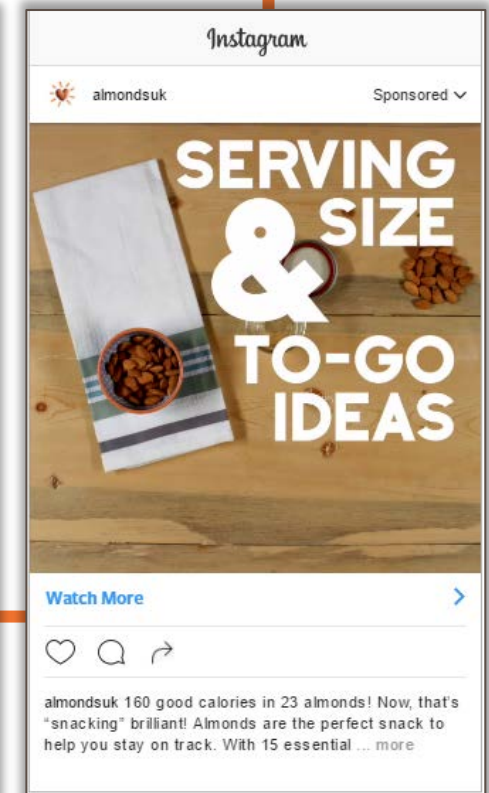
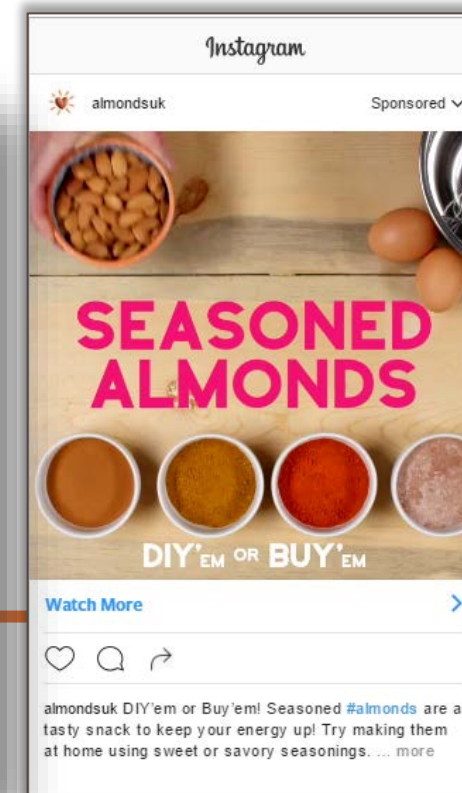
- To address the misconceptions she has about almonds (i.e., a lot of almonds for few calories – no guilt)
- To focus on the reasons to believe that are most important and motivating to her – health and weight management



SHIFTING MEDIA VEHICLES TO

REACH HER MOST EFFECTIVELY

Increase investment in social,
native, programmatic, mobile,
and dynamic digital placements



Health FILES

EXPERT TIPS...

Lucy Jones, a consultant and dietician from the Almond Board of California, tells us how to boost our nutrient intake through our snack choices:

"When time is tight, making snacks at the weekend to last you through the week can be really helpful. This can include sorting portions of almonds in resealable bags, or mini pots of hummus. Combine with wholegrain crackers or veg sticks, such as carrots, for a nutrient boost. Make sure you pop a couple of snacks in your handbag to help ensure a good level of nutrition throughout the day."

NUTS: THE PERFECT SNACK?



Eat MORE to banish the festive bulge: 7 metabolism-boosting foods to snack yourself SKINNY

Arm yourself with these smart snacks so you don't devour the entire biscuit tin on your first day back in office.



How FAT could save your life: From dark chocolate to almonds, we reveal the 9 foods that can help you live longer

- Diets which include so-called 'healthy' fats could increase life expectancy
- Unsaturated fats can be found in dark chocolate, flaxseed and soybean oil
- Avoid eating butter and red meats and replace them with healthier choices
- A leading health journalist reveals how you can eat the 9 healthiest fats



Almonds are high in healthy fats, fibre, vitamin E and magnesium and are a great plant-based source of protein



ENTANCED EDITORIAL COVERAGE & SOCIAL BUZZ

HOW I STAY HEALTHY

Lucy Jones, dietician and TV presenter

Being a dietician doesn't mean food is always easy... Lucy talks about her weight-loss struggle and feeding a fussy eater



NUTS My favourite healthy snack. A small handful of almonds every day helps to lower cholesterol, and they've been found to reduce visceral fat around the belly, which helps to reduce your risk of diabetes, cancer and

Woman's Weekly

Guilt-free Snacks On The Go

✓ Unsalted Almonds Per 20 almonds: 160kcal, 14.5g fat, 1.1g saturates, 0g sugars, 0g salt They're packed with nutrients including protein, potassium, calcium, magnesium, phosphorus, zinc, copper, manganese, iron, vitamins B1, B2 and B3, folate and biotin. And they're loaded with vitamin E - just 20 almonds provide more than half our daily need. They also contain naturally-occurring plant sterols, which help to lower blood cholesterol. Eat nuts with their skins on - they have much more fibre.

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Latest Headlines | Female | Fashion Finder | Food |

back to work already? Newlywed deliciously Ella reveals her latest treats made with almonds (and the grain of sugar in sight)

Clean eating guru Ella Mills, née Woodward, has released Food blogger, 24, has teamed up with the Almond Board of California. She highlights the benefits of eating the nuts with simple

SHARE: 14:16 GMT, 26 April 2016 | UPDATED: 14:42 GMT, 26 April 2016

Facebook | Twitter | Pinterest | Google+ | Email

deliciously Ella has thrown her weight behind a campaign to highlight the benefits of almonds. The celebrated food writer, who became Ella Mills when she tied the knot with her husband, has revealed five new ways to incorporate the nuts into daily life. Her new quick and easy recipes include almond and coconut bars, energy bites and more. Her latest ways of roasting the nuts using maple syrup for a sweet treat and a scroll down for video



Good Housekeeping



ADD ALMONDS In a six-week trial, people who ate almonds daily improved their blood cholesterol levels and lost dangerous tummy fat, which is linked to heart disease and type 2 diabetes.



BEAUTY & THE DIRT

Beauty | Fashion | Entertainment | Lifestyle

FOOD & DRINK > LIFESTYLE

EAT YOUR WAY TO GREAT SKIN

MMR ON DEC 22, 2015 AT 9:40 AM



INVESTME

NT

IN

MARKET

RESEARCH

- **2016** UK Snacking Landscape Study
- **2016** IRI Sales Analysis
- **2017** Attitudes, Awareness, and Usage Study
- **2017** UK Sustainability Study



**Marketing &
Research Efforts
are paying off...**

The background of the slide is a photograph of an almond orchard. The trees are in the foreground and middle ground, with a large, dark-colored building visible in the distance on the left. A semi-transparent red rectangular box is overlaid on the center of the image, containing white text. The text is centered and reads: "Almond volume sales increased by 12.5% in 2016".

**Almond volume
sales increased by**

12.5% in 2016



For the first time ever,
consumers have ranked
Almonds as the...

**#1 HEALTHIER
NUT IN THE UK**



AWARD-WINNING PROGRAMS!





FRANCE

Almond Board of California



ALMONDS ARE HOT FRANCE!



AWARENESS OF ALMONDS HAS INCREASED 12 POINTS

In 2015, almonds became the #2 nut overall, now ahead of peanuts, hazelnuts, cashews, and pistachios.
SINCE 2007.



The background of the slide is a photograph of an almond orchard. The trees are in full leaf, and the ground is covered with fallen almond leaves. An orange semi-transparent rectangle is overlaid on the center of the image, containing white text. The text is arranged in three main sections: a top line, a large percentage, and a bottom line.

Almond volume
sales increased

10.5% last year.

The only snack nut in France with
double-digit sales growth!

French consumers have ranked Almonds as the...

#1 HEALTHIES

AND

#1 NUT EATEN

SNACK!

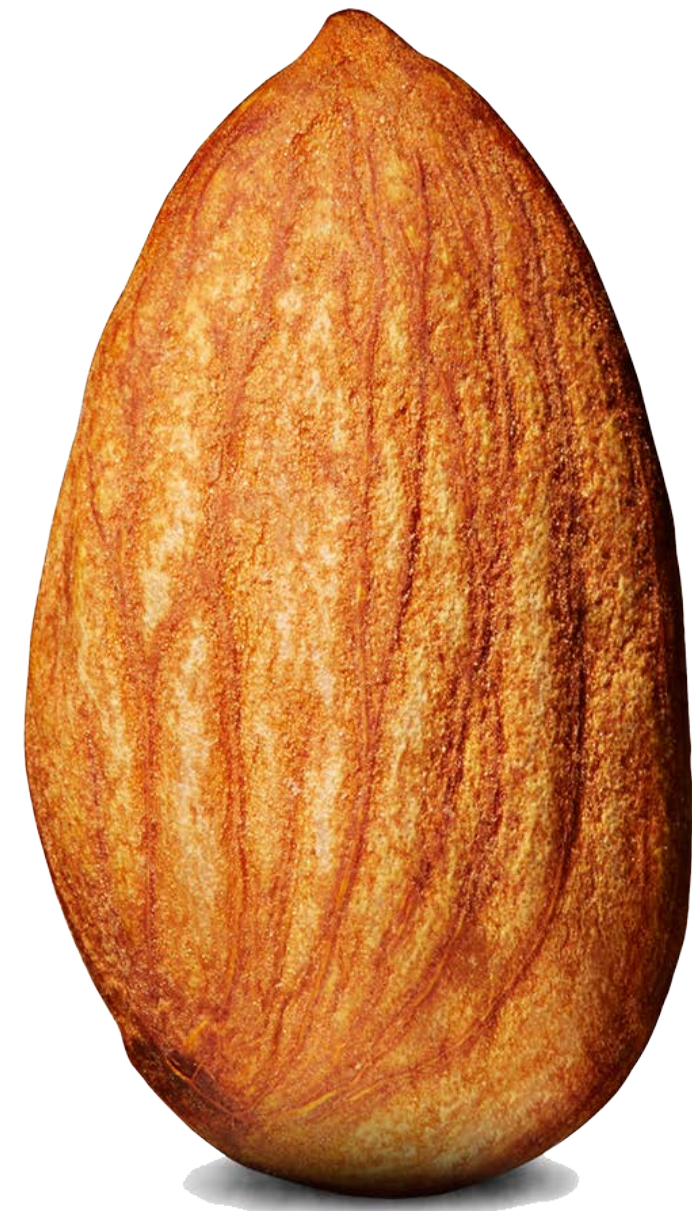


BUT ALMONDS STILL FACE SOME CHALLENGES IN FRANCE...





**AWARENESS
IS
STILL
RELATIVELY
LOW AT
13%.**



A close-up photograph of several almonds on a tree branch, with green leaves and branches visible in the background. The almonds are light brown and have a textured surface. The image is used as a background for the text overlay.

Almonds only make
up 7% of the snack
nuts category in
France.

Behind peanuts, cashews, and pistachios.

THE FRENCH CONSUMER HAS EVOLVED.

- “Eating right is all about balance, and choosing natural, unprocessed foods.”
- “Almonds are definitely a thing right now, and I carry them in my handbag. However, my knowledge about them is somewhat limited—I would like to know more about why they are good for me.”





HOW TO FURTHER DRIVE DEMAND FOR ALMONDS AS SNACK....



STRIKE WHILE THE IRON IS HOT.

- Continue to drive value of almonds by reinforcing the most motivational messages with French Jane!
- Keep marketing programs fresh & relevant to capitalize on current momentum in the market.

THE ADVERTISING MUST EVOLVE

to address new consumer insights.



**Des amandes...
Pour être au top
et y rester !**

Destination lointaine ou court déplacement ?
Pour garder votre vitalité, croquez une poignée
d'amandes. Riches en magnésium, vitamine E,
calcium et fibres, elles sont aussi une source
naturelle de protéines. Saines et délicieuses...
Tout au long du trajet, vous pouvez compter
sur les amandes.

Découvrez tous les bienfaits des amandes sur Almonds.fr

**california
almonds**
Almonds.fr



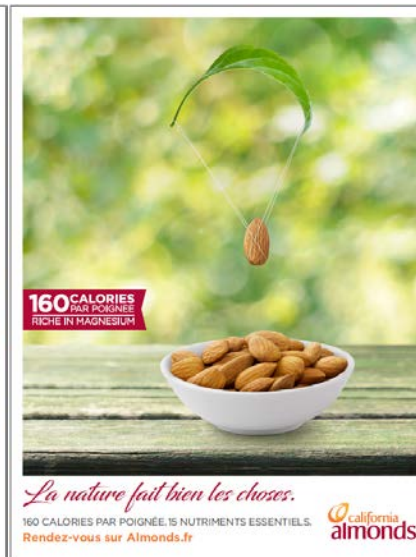
La nature fait bien les choses.

160 CALORIES PAR POIGNÉE.
Rendez-vous sur Almonds.fr



LAUNCH A NEW ADVERTISING CAMPAIGN IN JANUARY 2017

- Show French Jane that almonds are even better than she thought.
- Tell her why she should be eating even more!





ACCUEIL • NUTRITION • 4 BONNES RAISONS DE MANGER DES AMANDES

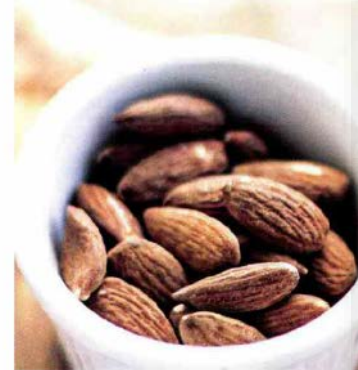
4 bonnes raisons de manger des amandes

Partager | Imprimer



LES AMANDES

>>> EN CETTE PÉRIODE D'ÉPIPHANIE, L'AMANDE EST À L'HONNEUR DANS LES GARNITURES DES GALETTES DES ROIS. CE FRUIT AUX MULTIPLES VERTUS GUSTATIVES ET NUTRITIONNELLES SÉDUIT CUISINIERS, PÂTISSIERS, CHEFS D'ŒUVRE. L'AMANDE, C'EST ÉGALEMENT L'ANTIQUITÉ, HISTOIRE,



Tout savoir sur les bienfaits des amandes

Publié le 5 septembre 2015 à 16h45



PHOTOS, RÉSULTATS...
RETOUR SUR UN WEEK-END RUNNING !

» SUR ELLE

CROQUEZ LA SANTÉ, CRACUEZ POUR LES MULLIS !

SAVOUREUSES ? OUI. CROQUANTES ? ÉVIDEMMENT ! MAIS SAVIEZ-VOUS QUE LES AMANDES SONT BIEN PLUS QUE DE LA GRASSE ? LEUR TENEUR EN PROTÉINES, EN FIBRES ET EN VITAMINE E EN FAIT UN ALIMENT IDEAL POUR LE CŒUR, PLUS D'ÉNERGIE ET RECORDANT DE NUTRIMENTS ESSENTIELS ?

STRONG PR AND EDITORIAL

L'AMANDE FRUIT À COQUE POLYVALENT

Pour Maïly Georgelin, pâtissier dans le Morbihan, à Etel, l'amande est l'un des ingrédients incontournables de la pâtisserie. Qu'elle soit fraîche, séchée, caramélisée, en poudre ou effilée, elle est incroyablement facile à marier et apporte des arômes, des textures et des saveurs que peu de fruits à coques peuvent lui envier.

TESTÉ PHILIPPE TOINARD



COSMOPOLITAN

MON SUPER-ALIMENT L'AMANDE DOUCE

madame FIGARO

DES AMOURS D'AMANDES

It-girls, fashionistas, business women... Pressées, stressées, mais soucieuses de leur santé et de leur ligne, elles ont toutes dans leur sac... des amandes de Californie ! Saviez-vous que cette région des États-Unis produit 80% de la production mondiale d'amandes ? Cet aliment naturel, riche en nutriments, à forte teneur en vitamine E et magnésium, avec 6 grammes de protéines et 4 grammes de fibres par portion de 30 grammes, contribue à la beauté et à la santé de la peau, des cheveux, des ongles...



MOULES GRATINÉES AUX AMANDES

Les bons produits / Nouvelles / 4

Les incroyables bienfaits de l'amande sur la santé !

EMELINE SALOMEZ
janvier 7, 2016 à 9:00 • 274



ÇA FAIT DU BIEN

Je grignotte sain



BONNE À CROQUER

On découvre les vertus de l'amande : un aliment qui ne nous veut que du bien en cas de petit creux. A retrouver p. 62.



BUILD A POWERFUL SOCIAL COMMUNITY

#AlmondLovers





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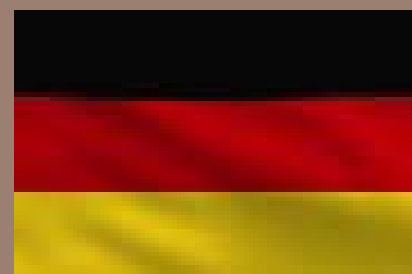
INVESTMEN

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IN MARKET

RESEARCH

- 2016 France Snacking Landscape Study
- 2016 IRI Sales Analysis
- 2017 Attitudes, Awareness, and Usage Study
- 2017 France Sustainability Study



GERMANY

Almond Board of California



THE CHALLENGE



GERMANY IS A LARGE MARKET AND OFFERS

GREAT OPPORTUNITY...

- Large geography with many regional differences
- Strong almond heritage in confectionery and baking
- Major growth potential



SNACKING ON ALMONDS IS A NEW CONCEPT

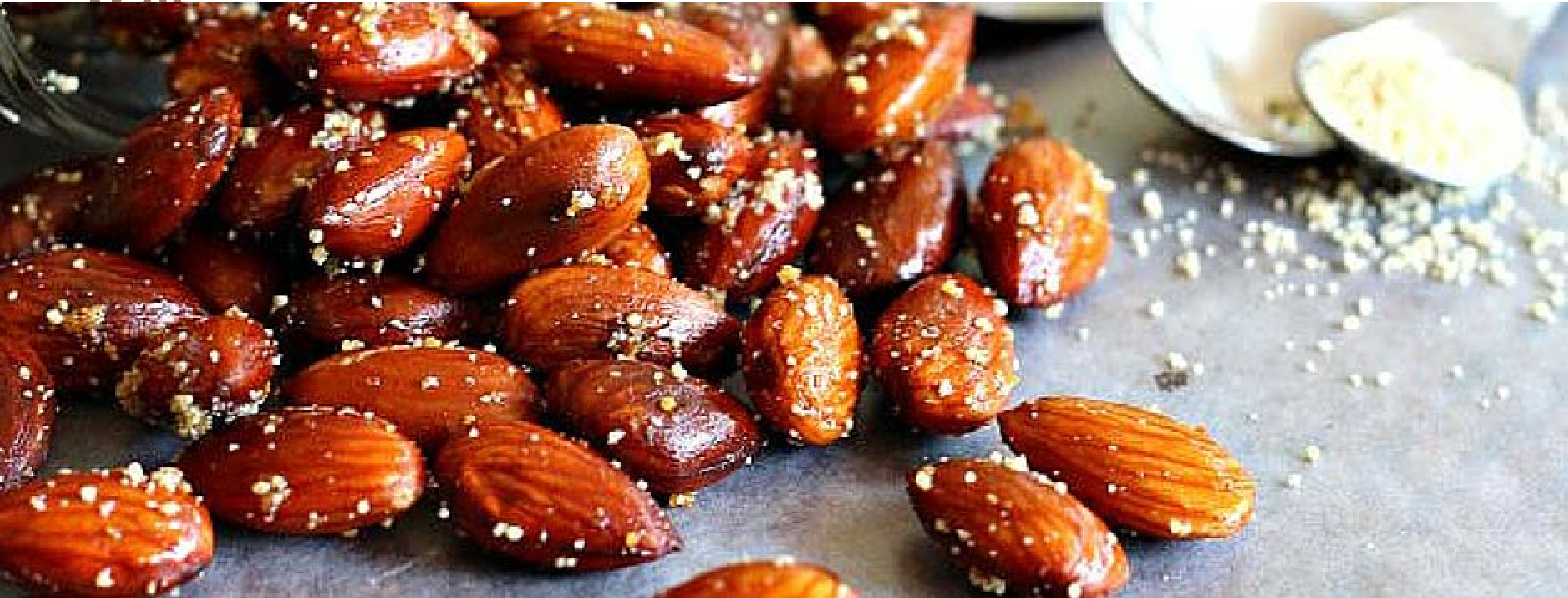
Strongly rooted in baking and Christmas time, top-of-mind awareness for almonds and baking is #1 at 48%.



AWARENESS FOR SNACKING ON ALMONDS IS LOW AT

Behind all other nuts (2015)

3%



ALMOND RETAIL PRICES CONTINUE TO INCREASE AND DRIVE VALUE SALES WHILE VOLUME SALES DECLINE AS A RESULT, THOUGHT AT A MUCH LOWER RATE

2015= -6.8%
Volume


23% PRICE INCREASE IN 2015 (23% 4 YEAR CAGR)

INVESTMENT IS NEEDED TO ISOLATE DEMAND FROM PRICE

TARGET INSIGHTS ARE EVOLVING

- Desire for variety, exciting tastes & textures, fresh, fun, and indulgent foods.
- Millennials are driving the snacking occasion in Germany.
- There is a need for quick, convenient, on-the-go snacks.



An aerial photograph of an almond orchard during bloom. The rows of trees are densely packed and covered in light pink blossoms, creating a textured, repetitive pattern across the landscape. The perspective is from a high angle, looking down on the orchard. The text is overlaid on a semi-transparent dark rectangle in the center of the image.

**HOW TO
FURTHER
DRIVE
DEMAND FOR
ALMONDS**

AS SNACK...



REFINE GERMAN CONSUMER TARGET BASED ON SEGMENTATION RESEARCH

- Opportunity segments are motivated by health, wellness, and weight-loss messages
- Chance to address misconceptions about almonds (i.e., high in fat & calories)
- Tap into the snacking psyche of Millennials and their desire for convenient, on-the-go, tasty treats

TEST MESSAG PLATFORMS V CONSUMERS

- In-Market qualitative research (Feb. 2017)



LAUNCH FIRST EVER ADVERTISING CAMPAIGN IN 2017





SUPPORT ADVERTISING CAMPAIGN WITH MEDIA INVESTMENT

Sind Mandeln gesund? Oder sind sie sogar das gesündeste Nahrungsmittel der Welt?
 SMARTFOODFACTS 15. SEPTEMBER 2015 0 ABNEHMEN, ERNÄHRUNG



ERNÄHRUNG

HEINRICHS LÄUFERKÜCHE

Die Superfrucht

Mandeln sind keine Nüsse, sondern Steinfrüchte. Puroder zum Energieriegel gebacken sind sie der beste Lieferant für Energie.

Kaum ein Gewächs enthält so viele wertvolle Nährstoffe in so kompakter Form wie Mandeln. Dank ihres hohen Gehalts an gesunden Fettsäuren und wertvollen Mineralien sind sie die ideale Sportlersnack. Und sie senken ebenfalls das Risiko für Herz-Kreislauferkrankungen, Diabetes und Bluthochdruck.

Tipp: Genießen Sie Mandeln ruhig mit der braunen Haut. Sie enthält viele Ballast- und sekundäre Pflanzenstoffe!

ABNEHMEN

Mandeln machen dünn – laut Studie!

Sie sind dank Antioxidantien und guter Fette nicht nur super gesund. Jetzt fand eine Studie heraus: Mandeln können sogar beim Abnehmen helfen. Wir erklären, warum.

von Sandra Link
15. August 2015 10:54 Uhr

Facebook Twitter Pinterest Google+ Email



CONTINUE STRONG PR EFFORTS

- 21 day challenge
- Blogger partnerships
- Launch in Socialsphere (Facebook)

MANDELN

MEIN TIPP MANDEL-SMOOTHIE

Snacken mit gutem Gewissen! Adieu Chips... hallo Mandeln!

- * 1 grosse oder 2 kleine Bananen
- * 250 ml Mandelmilch
- * 50 g Haferflocken
- * 2 Prisen Zimt
- * etwas Ahornsirup oder Honig

Alle Zutaten in den Smoothie-Maker oder Mixer geben und pürieren.

Phenol? Vitamin E?
Das sind beides Antioxidantien, die für ein klares Hautbild sorgen.

BLÜTENZAUBER

Tag der Mandel: Kleine Powerfrucht mit großer Wirkung

Veröffentlicht von Anna Löhlein

Fit & Healthy FOOD COACH

Die Expertin
Dagmar von Gramm, Ökotrophologin und Herausgeberin von eathealthy.at. Fit Food Coach bei allen Fragen rund um gesunde Ernährung.

Schutz vor dem WINTERSPECK

5 Tricks um Süßhunger zu vertreiben!

Ob Lebkuchen, Glühwein oder Schoko-Nikolaus – die Versuchung, Süßes zu essen oder zu trinken, steigt jetzt akut: **Satte 200 Kalorien mehr am Tag vernaschen wir im Winter. Warum? Wie trücken wir den Süßhunger aus?**

Warum die Lust auf Süßes im Winter steigt
Wie stark unser Hungergefühl ist, wird von einem komplexen Hormon-System gesteuert. Wenn im Herbst die Sonnenstunden schwinden, sinkt unser Spiegel an Vitamin D und damit auch an Serotonin. Um das Glückshormon wieder zu pushen, verlangt der Körper nach Zucker, weil der die Aufnahme von Tryptophan ins Gehirn fördert. Diese Aminosäure wiederum ist der Grundbaustein von Serotonin. Gleichzeitig treibt Süßes den Insulinspiegel in die Höhe, lässt ihn aber genauso schnell wieder in den Keller fallen, was den Süßhunger noch mehr verstärkt. Ein Teufelskreis, der auf Dauer dick und traurig macht.

• Eintöpfe oder Gemüseragouts stillen effizienter den Serotoninbedarf und füllen den Magen. Besonders wirksam sind Hülsenfrüchte, Rote Bete, Spinat, Tomaten und Fenchel.
• Gewürzte Mandeln (Chili, Curry, Zimt)

Der Kern einer mit dem Pfirsich verwandten Frucht. Es gibt drei Arten – die süße Mandel, die Krachmandel und die Bittermandel. Nur die ersten beiden sind zum Verzehr geeignet, die Bittermandel ist zunächst giftig, erst nach chemischer Bearbeitung wird sie essbar.

Kleine Alleskönner

In Deutschland wurde die Mandel zunächst in Form von Marzipan bekannt, das vor Jahrhunderten bereits zum Süßen bitterer Früchte verwendet wurde.

kochen, bis eine sirupartige Masse entsteht. Auf einem Backblech verteilen, auskühlen lassen. Und wer gebrannte Mandeln lieber fertig kauft, folgt einfach auf dem nächsten Jahrmarkt dem verlockenden Duft ...

Kern der Vielfalt

Ob als saftiges Marzipan, feines Mus oder kandiert vom Jahrmarkt – Mandeln haben jetzt Hochsaison



INVESTMENT IN MARKET RESEARCH

- **2016** Germany Snacking Landscape Study
- **2016** IRI Sales Analysis
- **2016** Category Sales Deep Dive
- **2017** In-Market Qualitative with Consumers
- **2017** Attitudes, Awareness & Usage Study
- **2017** Germany Sustainability Study



ROBUST MARKETING
PROGRAMS WILL BE
REQUIRED
DOWN THE ROAD
SUCCESSFULLY
CONQUER GERMANY



THE ALMOND SNACK CONSUMER CONTINUUM

Low Almond Snacking Awareness & Usage


Germany

Build relevance and usage intent for almonds as a **snack**



UK

Make almonds the go-to snack

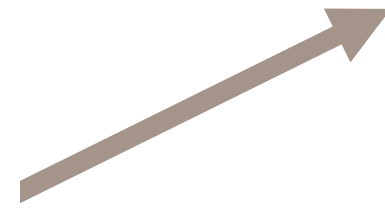
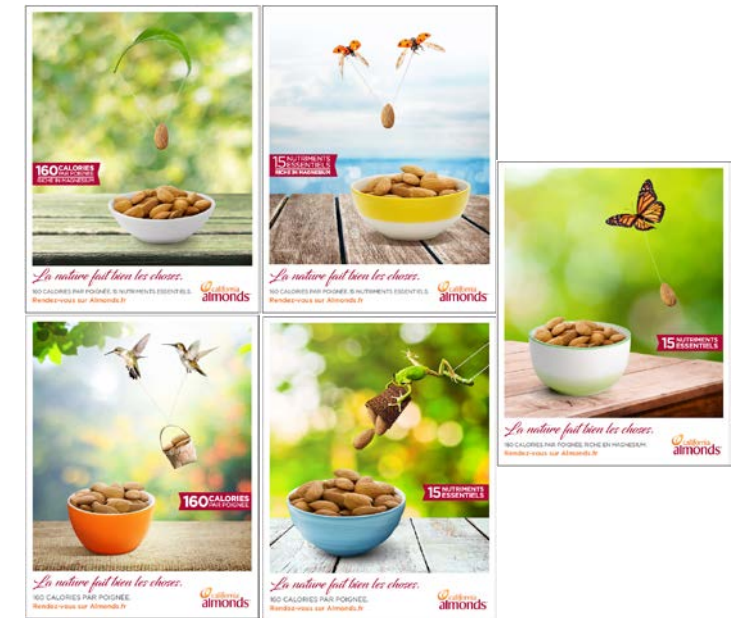
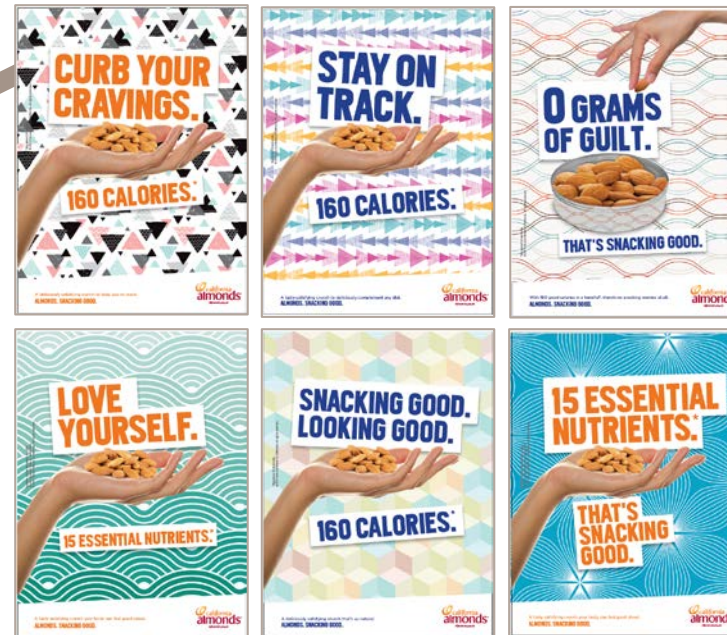



France

Eat more almonds, More often



Higher Almond Snacking Awareness and usage





43% of total exports

Shipments = **523** million pounds

#1 nut for New Snack Product Introductions!

CUE VIDEO!

Questions?

