




The Future of the North American Almond Market and the Trends That Will Take Us There

December 7, 2016





**Al Greenlee,
Blue Diamond Growers**



**Molly Spence,
Almond Board of California**

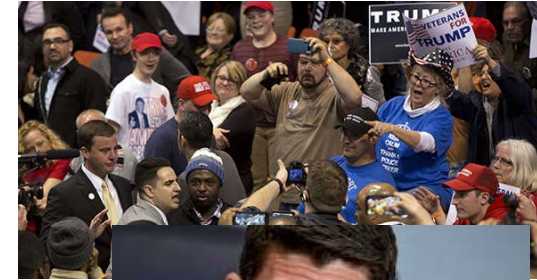
North America: The State of the Region in December 2016

It's December...that time when we look back on what made the news in 2016.

2016

January							February							March							April												
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29							29	30	31					29	30	31				29	30	31											

What was disruptive in 2016?



But you know, we all hunger for ways we can connect.







Meanwhile in Canada...



When it comes to food...



BIG FOOD STRIKES BACK

**WHY DID THE OBAMAS FAIL TO TAKE
ON CORPORATE AGRICULTURE?**

BY MICHAEL POLLAN

OCT. 5, 2016

Socially responsible purchasing

Big Food's Biggest Challenge: Regaining Consumer Trust

- 32% of consumers plan to make more socially responsible food purchases, almost double the percentage from 2012
- And plans have become reality among
 - millennials (10.3%)
 - families with children (7.5%)
 - households with incomes above \$75,000 (6.9%)

Deloitte research for GMA and FMI, 2016

Big companies making dramatic changes

- Acquisitions
- Incubators
- Testing recipes in food trucks
- Severing ties with industry on GMO labeling
- Sustainability commitments
- “Change agents”
- Ag Water Challenge
- Weather surveying
- Paying farmers to go organic

Campbell's

Mars



.....
GENERAL MILLS

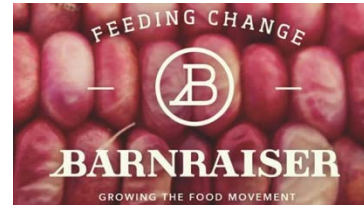


Unilever

Kellogg's

Wide spectrum of proposed sustainability solutions

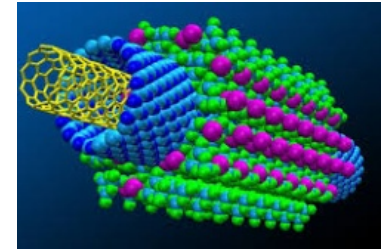
- Venture capital groups/funds/incubators comprised of conscious companies
- Urban shrimp farming to avoid Vietnamese slavery
- Edible packaging with a milk-based coating
- Cellular agriculture
- Bug eating and cockroach milk
- Microbe-related work
- Food Ink/3d printed food
- Nanotechnology
- Proliferation of plant-based innovation this year
- Hyper-local, closed loop communities



Perfect Day



Figure 3. Ideal Cycles of Nature and Society



Grab 'em by the wallet

**#DUMPKELLOGGS: BREAKFAST BRAND
BLACKLISTS BREITBART, DECLARES HATE
FOR 45,000,000 READERS**



Ivanka Trump boycott campaign
#GrabYourWallet claims retail victory



BUSINESS

Target Adds Private Bathrooms to Quell Transgender Debate

Follows customer protests of its restroom policy on transgender individuals

Driscoll's

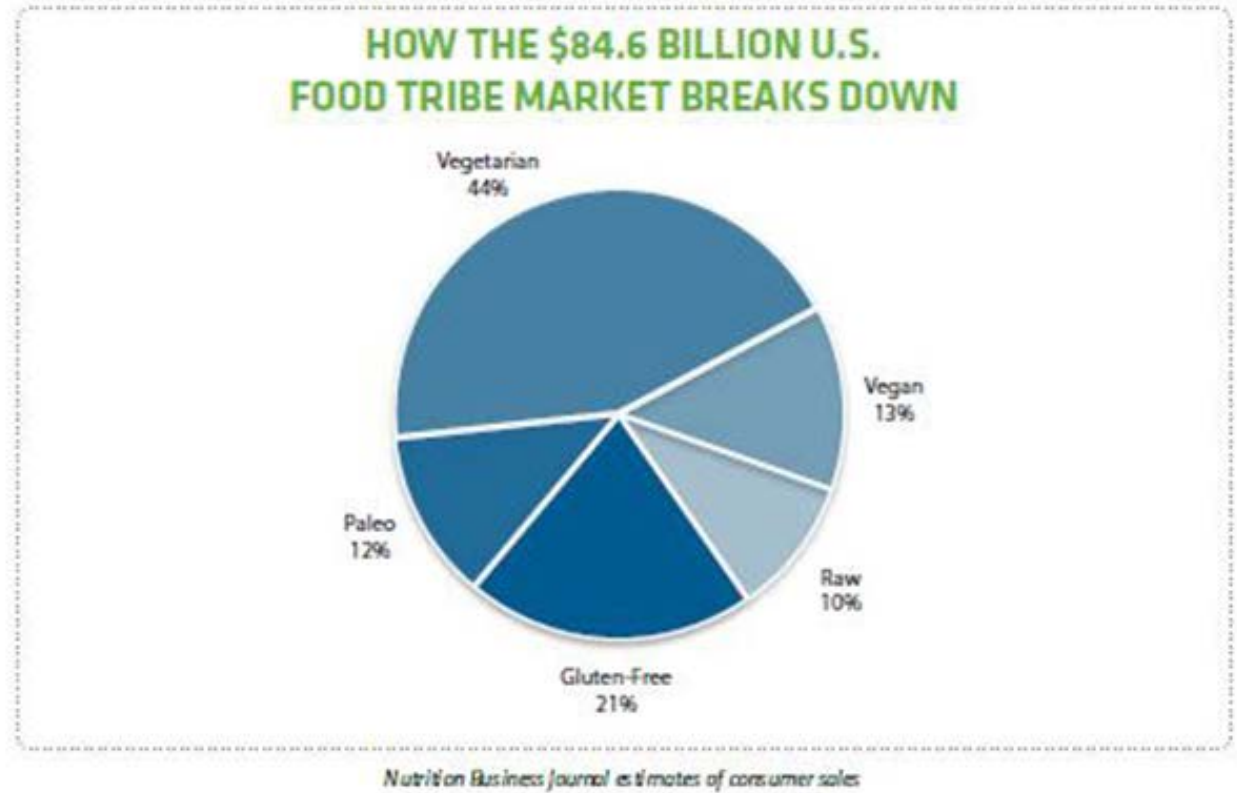
FARM
tank

sacramento, ca
sept 22-23 | 2016

The tribes

Newer tribes:

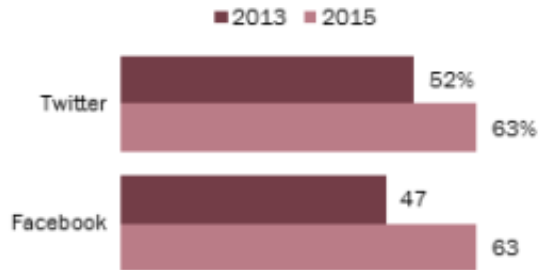
- Sugar-free
- Pegans
- Freegans
- Biohackers



A continued war on science

On Facebook and Twitter, More Users Are Getting News

% of users of each platform who get news there



Social Media and News Survey, March 13-15 & 20-22, 2015, Q2, Q4. Facebook News Survey, Aug. 21-Sept. 2, 2013, Q9.

Note: News is defined as "information about events & issues beyond just your friends and family."

PEW RESEARCH CENTER

9 MINUTE READ | WORLD CHANGING IDEAS

Social Network Algorithms Are Distorting Reality By Boosting Conspiracy Theories

GMOs – a labeling compromise, but the war is not over

Is the GMO War Over?

Just when we thought that the GMO war was over, it looks like technology is still on the battleground.

📅 November 1, 2016



“Above and beyond” – even at Aldi

Aldi says it won't sell foods raised with major pesticides

Apr 26, 2016, 12:02pm CDT Updated Apr 29, 2016, 8:50am CDT



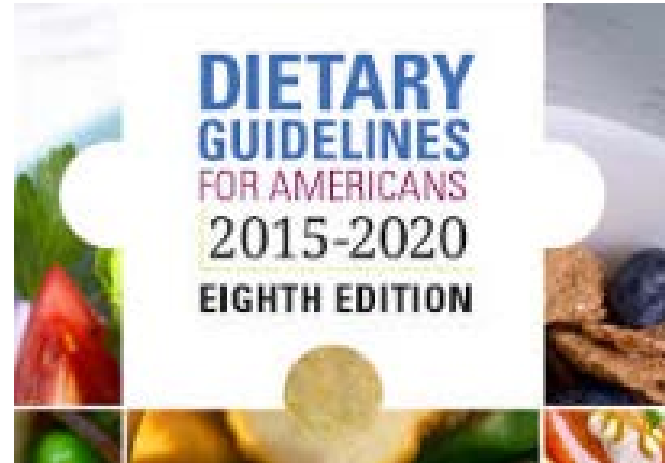
- But how science based is it?

Sustainability not covered in the latest Dietary Guidelines – so what's next?



Scientific Report of the 2015 Dietary Guidelines Advisory Committee

Advisory Report to the Secretary of Health and Human Services
and the Secretary of Agriculture



Regarding almonds
specifically...



We've been addressing questions about how almonds & other foods are produced

**GROW WHAT YOU KNOW
ABOUT ALMONDS**



Opportunities for almond product innovation

- Sustainability needs
- Wide range of food tribe needs



Almonds have new DVs, and a new nutrition label



CONSUMERS

FOOD PROFESSIONALS

HEALTH PROFESSIONAL

Snacking

Health & Nutrition

Almond Recipe Center

BLOG

[Blog](#) » [Announcements](#) » [Article](#)

NEW NUTRITION FACTS ABOUT ALMONDS...BETCHA DIDN'T KNOW

Posted October 24th, 2016



Building on the recent announcement from FDA about new guidance on the term [healthy](#) and how almonds—full of naturally good fats*—now meet the updated definition, there's more good nutrition news to share: a one ounce serving of almonds now provides half of the daily needs for vitamin E and is a significant source of magnesium and riboflavin, too.

As a result of changes to the Nutrition Facts panel that went into effect earlier this year, many of the Dietary Reference Intake Values for vitamins, minerals and other nutrients were also updated. The Dietary Reference Intake Values are used to

calculate the percent Daily Values (%DV) seen on food packages. Several of those that changed are key nutrients found naturally in almonds. The result of all this is that a healthy handful of almonds is now a good source of fiber (13% DV) and an excellent source of riboflavin (25% DV), magnesium (20% DV) and vitamin E (50% DV).



Healthy!

BLOG

[Blog](#) » [Announcements](#) » [Article](#)

ALMONDS ARE NOW “HEALTHY,” ACCORDING TO FDA

Posted September 30th, 2016

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[Pinterest](#) 0

[googleplus](#) 0

[Email](#) 6



If you're like most people, you probably always thought almonds were healthy. But until this week, the U.S. Food and Drug Administration (FDA) did not allow almonds to be called “healthy” on food labels, due to the agency’s regulatory definition of the term that considered a food’s total fat content, rather than distinguishing among different types of fat.

As of September 27, 2016, that’s changed, and almonds can officially declare that they are a healthy food!

As we reported in a previous [blog post](#), the FDA announced in May 2016 its intention to re-evaluate its definition of the term “healthy” and this week, the agency unveiled a [new interim definition](#) for the term “healthy” while it begins the public regulatory process.



Video:

The Almond Board's Marketing Progress in 2016



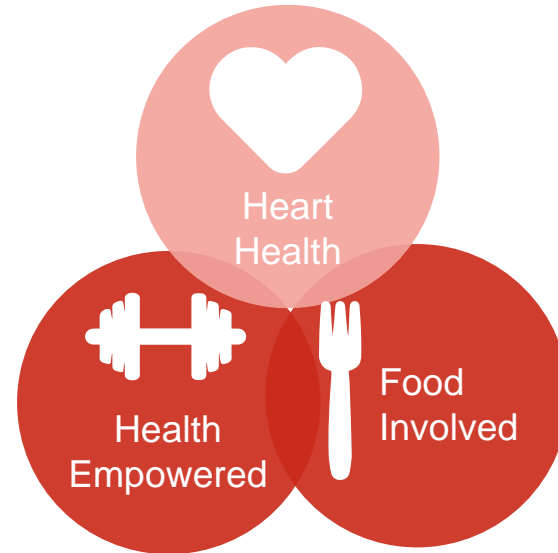
**Laura Morin,
Sterling-Rice Group**

A close-up photograph of several almonds scattered on a teal-colored wooden surface. The almonds are in various orientations, some showing their characteristic ridged texture. In the background, a piece of light-colored, textured fabric is visible. Overlaid on the center of the image is a white rectangular frame containing the text "EVOLUTION OF CONSUMER TARGET" in a clean, white, sans-serif font. The text is arranged in four lines: "EVOLUTION" on the top line, "OF" on the second line, "CONSUMER" on the third line, and "TARGET" on the bottom line.

EVOLUTION
OF
CONSUMER
TARGET



WHERE WE WERE...





Moved from heart health to a

**HEALTHY
LIFESTYLE**

Shifted how we think about **FOOD INVOLVEMENT**



FOOD INVOLVED
Accomplished cook & entertainer



FOOD EXPLORERS
Creative in the kitchen & tries new foods

Incorporated snacking behavior

almonds

1.4%

Snack Choices

almonds

6%

Snack Occasions

Included
**YOUNGER
SNACKERS**



**SNACKING ON
MORE
FOODS,
MORE
OFTEN**



MEET SAVVY SNACKERS

Food Explorers

Health Seekers

Super Snackers



ONLINE ENTHUSIAS T

Downloads recipes, blogs, podcast, photo share, sports, online banking



INCOME

Household income (\$64K+)



EXPERIEN CE SEEKER

Concerts, museums, classes, events, enjoys traveling, tries new things



Busy + Active

Home improvement, enjoys cooking, working in the yard



FOLLOWS A REGULAR EXERCISE ROUTINE

Cycling, running, hiking, swimming



KEEPS IT FRESH

Eats a wide variety of fruits and vegetables

4 Segments within Savvy Snackers

SUPER
FOODIES

HEALTH
NUTS

THE
Trendsters

INFORMED
INTELLECTUALS



Educated, involved and stimulated by many things,

Super Foodies get energy by being around others, and enjoy hosting events or going out with friends.

10% of U.S. Adults



HEALTH
NUTS



Highly educated, urban dwellers,

Health Nuts stay physically

fit, always try to eat right and care about how they look.

9% of U.S. Adults



THE Trendsters



Millennial parents who still care about the finer things in life,

The Trendsters are a

go-to source for all things hype and know that everything they wear, buy and do is a reflection of their status.

9% of U.S. Adults



INFORMED INTELLECTUALS



Insatiable in their search of information,

Informed

Intellectuals

are wealthy, care about the intricacies of how things work and seek out goods that are better for the environment.

12% of U.S. Adults

A young man and woman are embracing in a field at sunset. The woman is wearing a plaid shirt and the man is wearing a red jacket. The background is a grassy field with a fence and trees, all bathed in the warm, golden light of the setting sun. The text is overlaid on the image, centered and enclosed in a white rectangular border.

HOW DO WE
CREATE
AN
EMOTIONAL
CONNECTION?
N?



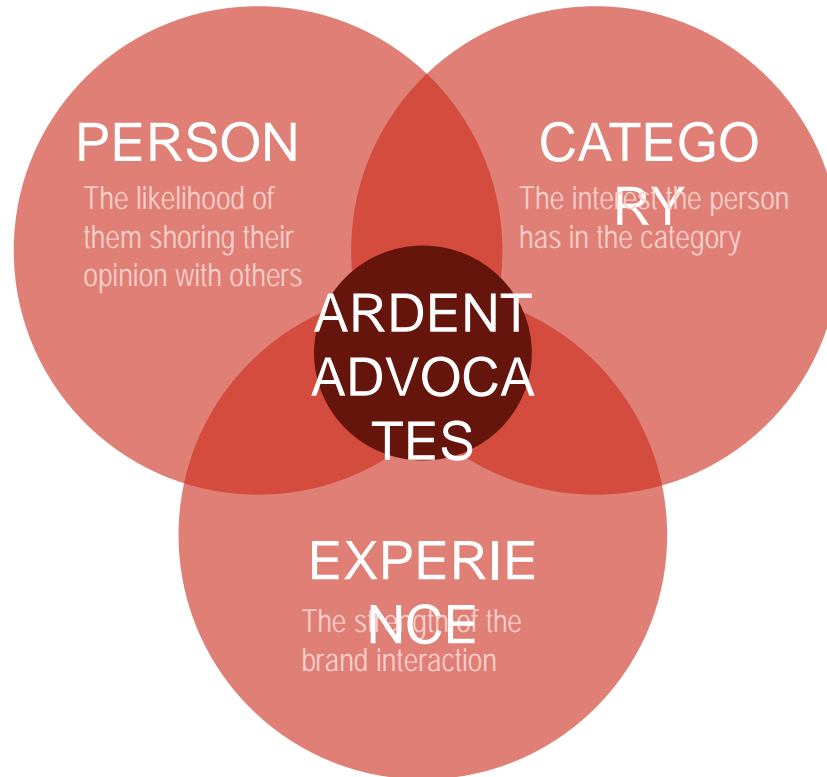
FUNCTI ONAL

- + Protein
- + Fiber
- + Antioxidants

EMOTI ONAL

- Joy
- Empowerment
- Vibrancy
- Greater Good

Build advocacy among our loyal almond consumers





Melissa Mautz
Almond Board of California

The ABCs of Content Marketing

The Almond Conference

Melissa Mautz



Digital Marketing Has Evolved

It's not just about

social strategy

or

digital strategy...

... it's about an **omnichannel**

content

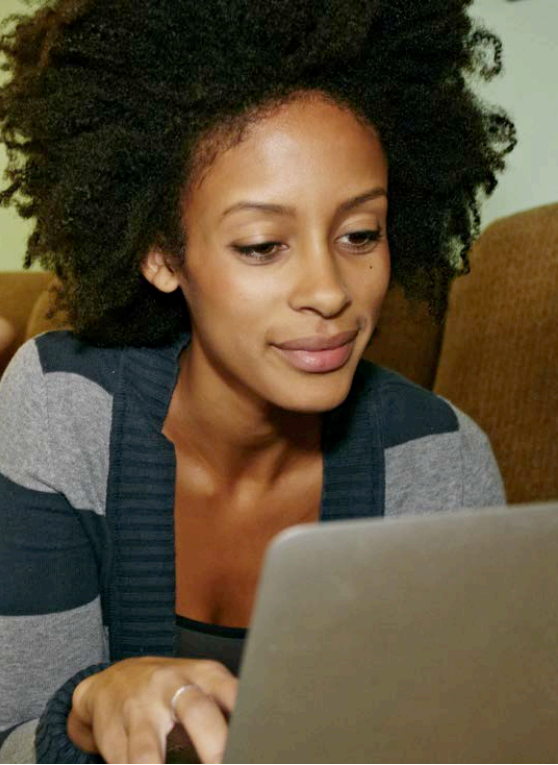
strategy.

Content Marketing Defined

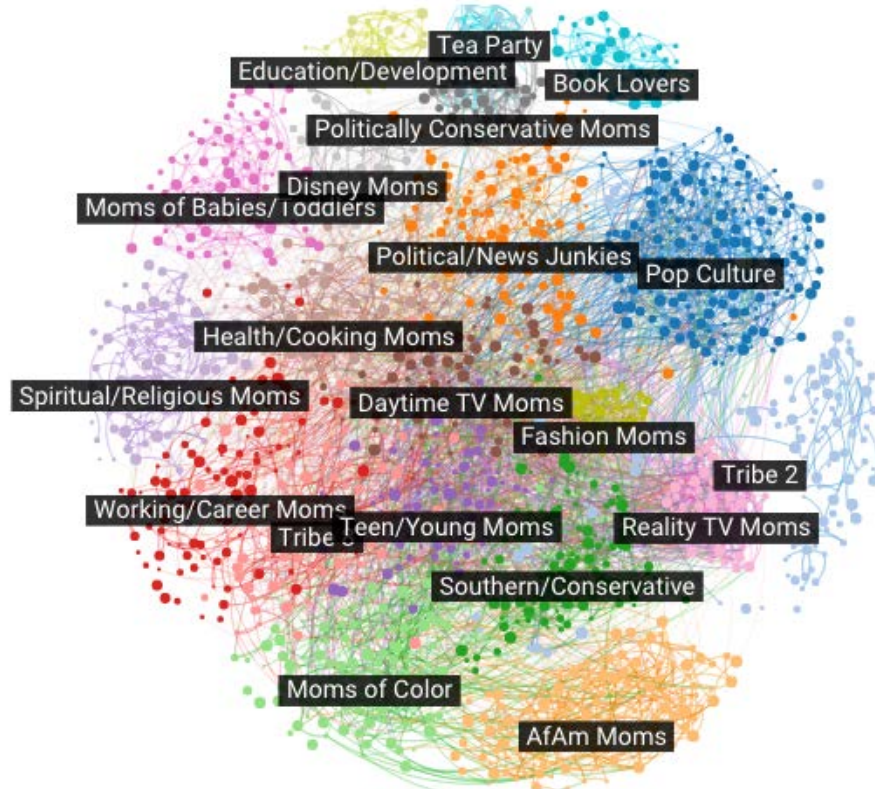
Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly-defined audience — and, ultimately, to drive profitable customer action.

- Content Marketing Institute

Know Your Audience



It's more than just "moms"



Finding Your Content Gem?





Best in Class: Patagonia

catalog



web

A collage of screenshots from the Patagonia website. The top screenshot shows the homepage with a search bar and navigation links. Below it, a video player displays a trailer titled "FAMILY BUSINESS: INNOVATIVE ON-SITE CHILD CARE SINCE 1983 (TRAILER)". The video description reads: "Published by Patagonia, Family Business: Innovative On-Site Child Care Since 1983 illustrates what quality child care looks like and why providing on-site child care to working families is at the heart of responsible business." Below the video is a "Watch the video" link. To the right, another screenshot shows an order confirmation page with details for a purchase of \$170.00.

email

A screenshot of a Patagonia email newsletter. It features the Patagonia logo, navigation links for NEWS, FORUMS, and WEB SPECIALS, and a promotional banner for "FREE SHIPPING ON ORDERS OVER \$70". Below the banner is a photograph of a person surfing, with the text "30 Years of Patagonia" and a short paragraph about the company's history.

eCommerce

mobile

social

Screenshots of Patagonia's social media presence. The top part shows the Facebook profile with a cover photo of a person climbing a rock. Below that is the Instagram profile, which includes a grid of photos and a bio that reads: "Patagonia built its best products from an unwavering love, respect & respect for the environment. Our products are made to last." The bottom part shows a tweet from Patagonia about sustainable farming practices.

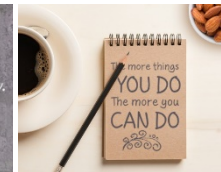
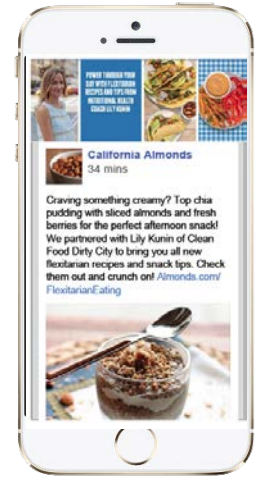
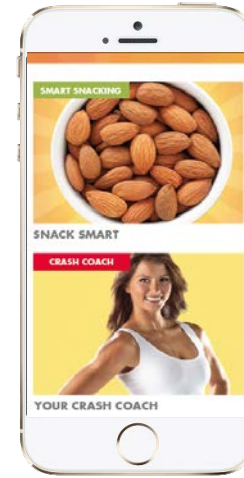
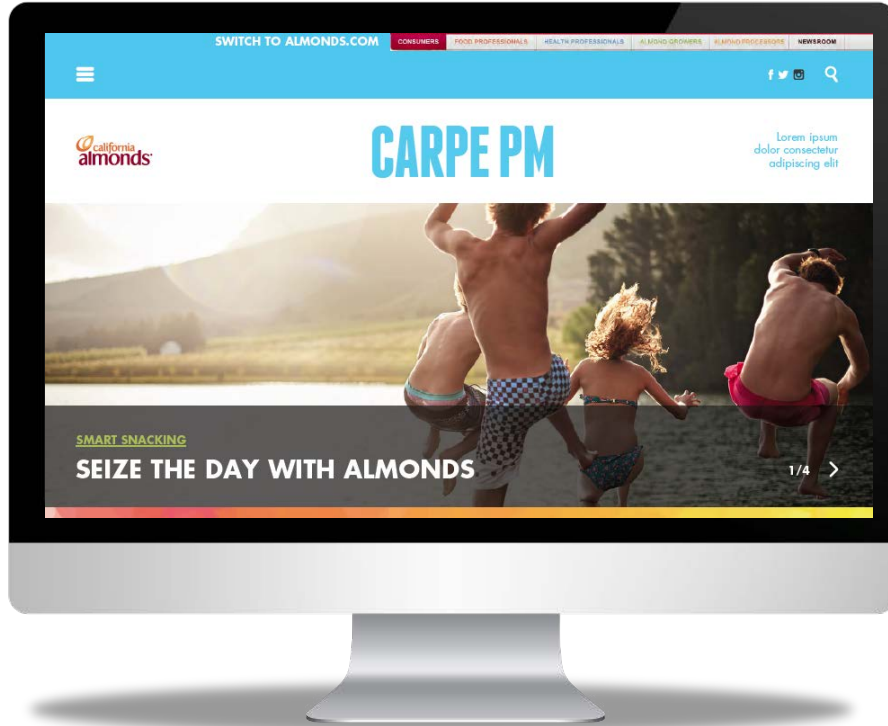
How This Works

Great content =
More qualified
engagement





North America Program



A close-up photograph of a glass of almond milk on the left, which is out of focus. To the right is a glass jar filled with almonds, which is in sharp focus. The background is a warm, golden-yellow color.

Questions?