

**THE ALMOND
CONFERENCE**

20
25



WELCOME!

**BREAKFAST SESSION:
ALMONDS IN ACTION,
DRIVING INNOVATION IN FOOD AND BEVERAGE**

THURSDAY, DECEMBER 11, 2025

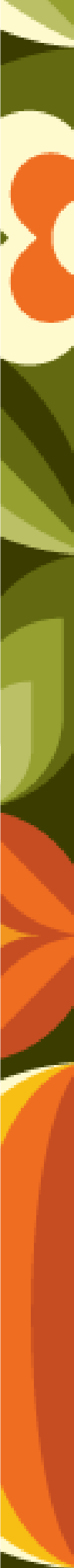
 **CULTIVATING A HEALTHIER
FUTURE**



DRIVING GLOBAL DEMAND

Clarice Turner,

President and CEO Almond Board of California





The background of the image is a dense, close-up shot of many almonds, showing their characteristic brown, textured skin. On the far left, there is a vertical decorative bar with a green and orange pattern. Overlaid on the almonds is the text '9, 883' in a large, white, sans-serif font. Below this, the words 'GLOBAL NEW PRODUCTS' are written in a smaller, white, sans-serif font.

9, 883

GLOBAL NEW PRODUCTS






NO.

1

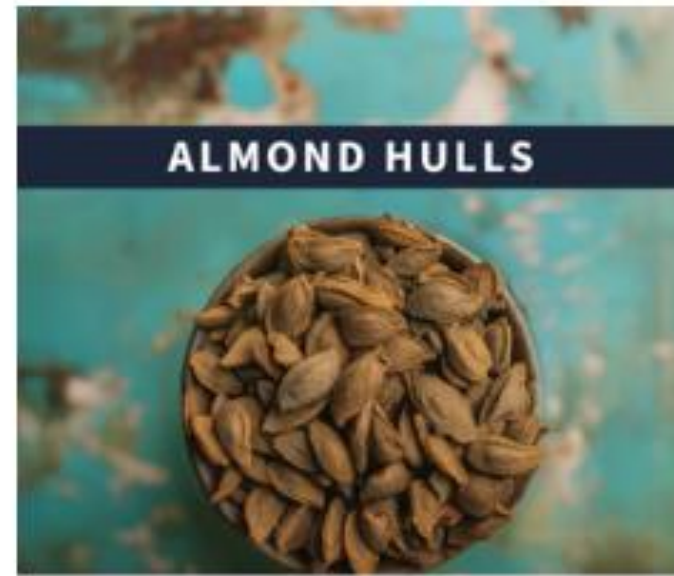
NUT



SNACK
VOLUME / 50%

INGREDIENT
VOLUME / 50%

14 FORMS



The image features a dense background of almonds. Overlaid on this is a large white 'X' formed by two circles. The left circle contains the word 'VOLUME' and the right circle contains the word 'VALUE'.

VOLUME

VALUE



DRIVING GLOBAL DEMAND

Emily Fleischmann

VP, Global Market Development



**MARKET
VIABILITY**

**OPERATIONAL
FEASIBILITY**

**CONSUMER
DESIRABILITY**

1908



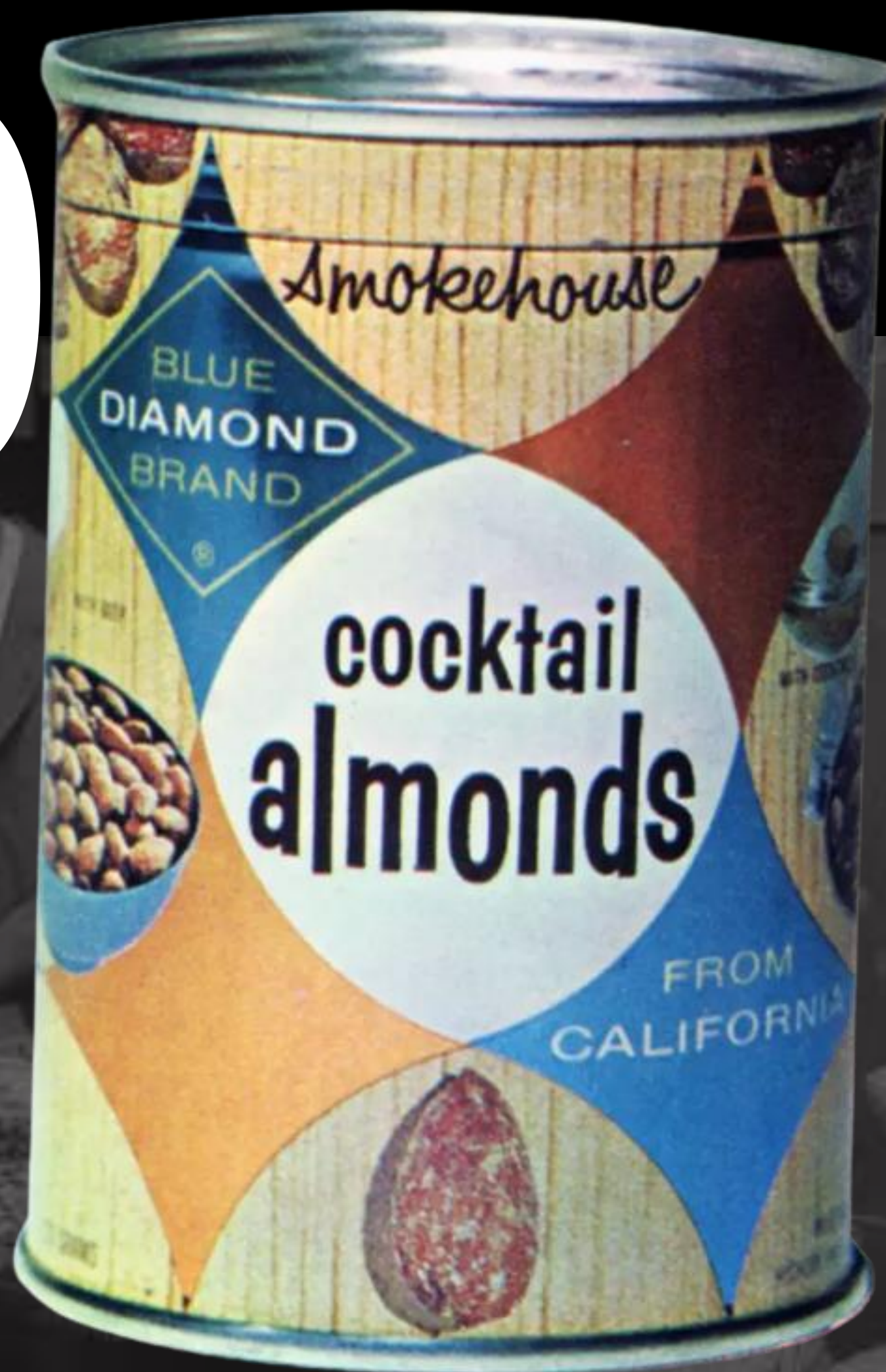
2,000+ NEW PRODUCTS A YEAR



1928



1949



Thematics® Stand-Out Insert™ is a trademark of SYNERGISTIC MARKETING, INC., 477 Madison Ave., NY, NY 10022 (212) 751-2253

1979

"Mmm... honey nutty flavor!"



Honey Nut Cheerios is the sunny taste of honey blended wholesome and kinda nutty. For a delicious honey nutty flavor.

2004



2004



2012



2005



NOW





**MARKET
VIABILITY**

**OPERATIONAL
FEASIBILITY**

**CONSUMER
DESIRABILITY**





DRIVING GLOBAL DEMAND

Lu Ann Williams,

Innova Market Insights



**INNOVA
MARKET
INSIGHTS**

ALMONDS IN ACTION

**DRIVING INNOVATION IN
GLOBAL FOOD AND BEVERAGE**

INSPIRE INNOVATION DRIVE GROWTH

**INSIGHTS
360**



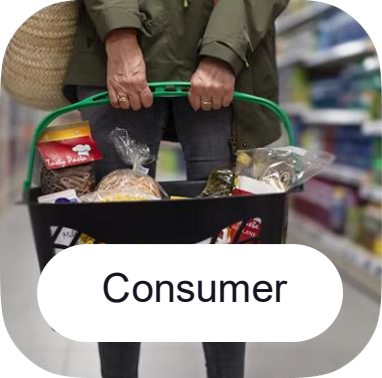
INNOVA: INSIGHTS
PARTNER FOR INNOVATION



Category



Products



Consumer

INSIGHTS
360°



Ingredients



Packaging



Flavors

3 

Years of Trends
and insights

90%

of innovation captured,
globally

200M

Records



BIG

Time Saver


90+

Countries



AI

Enhanced
Platform



Today's Roadmap: From Trends To Action



- ✓ **CONSUMER EXPECTATIONS ARE SHIFTING**
- ✓ **ALMONDS' UNIQUE ROLE IN MEETING MODERN DEMAND**
- ✓ **WHERE GLOBAL GROWTH IS ACCELERATING FOR ALMOND INGREDIENTS**
- ✓ **WHERE ALMONDS MUST COMPETE AND WIN**
- ✓ **GLOBAL EXAMPLES OF ALMONDS IN ACTION**
- ✓ **THE EMERGING ALMOND INGREDIENT SYSTEM**
- ✓ **IMPLICATIONS AND ACTIONS FOR GROWERS**

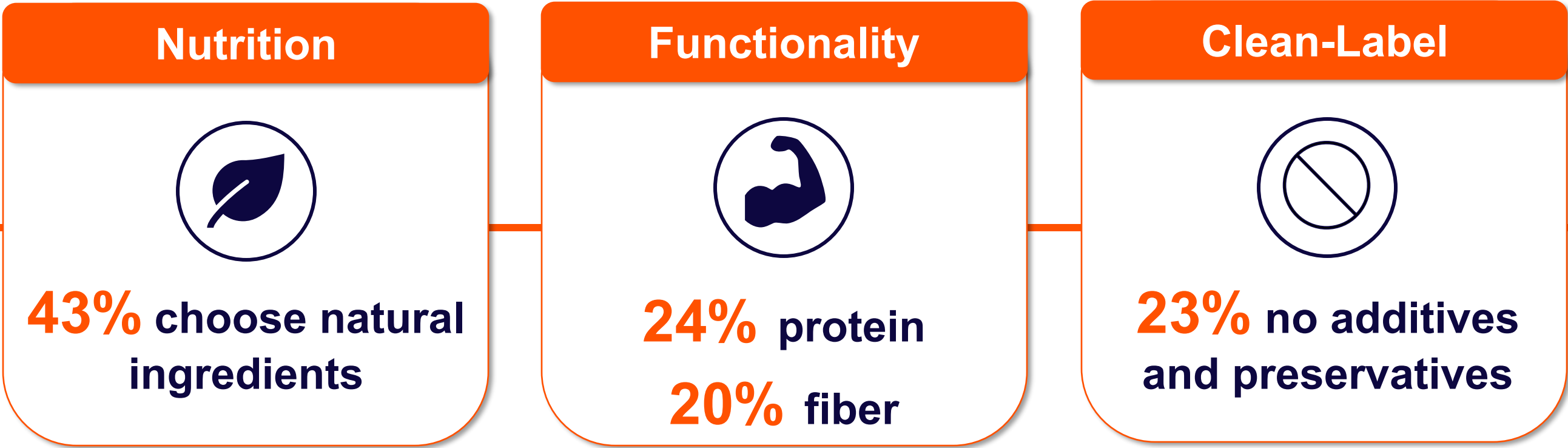
Taste is King – But It Needs a Wingman



Consumers expect foods to deliver nutrition, functionality and clean-label value

For consumers globally, **Taste** is the top consumption driver for **75%** of categories surveyed. *

TASTE IS ESSENTIAL - BUT THE NEW EXPECTATION IS *TASTE WITH PURPOSE*



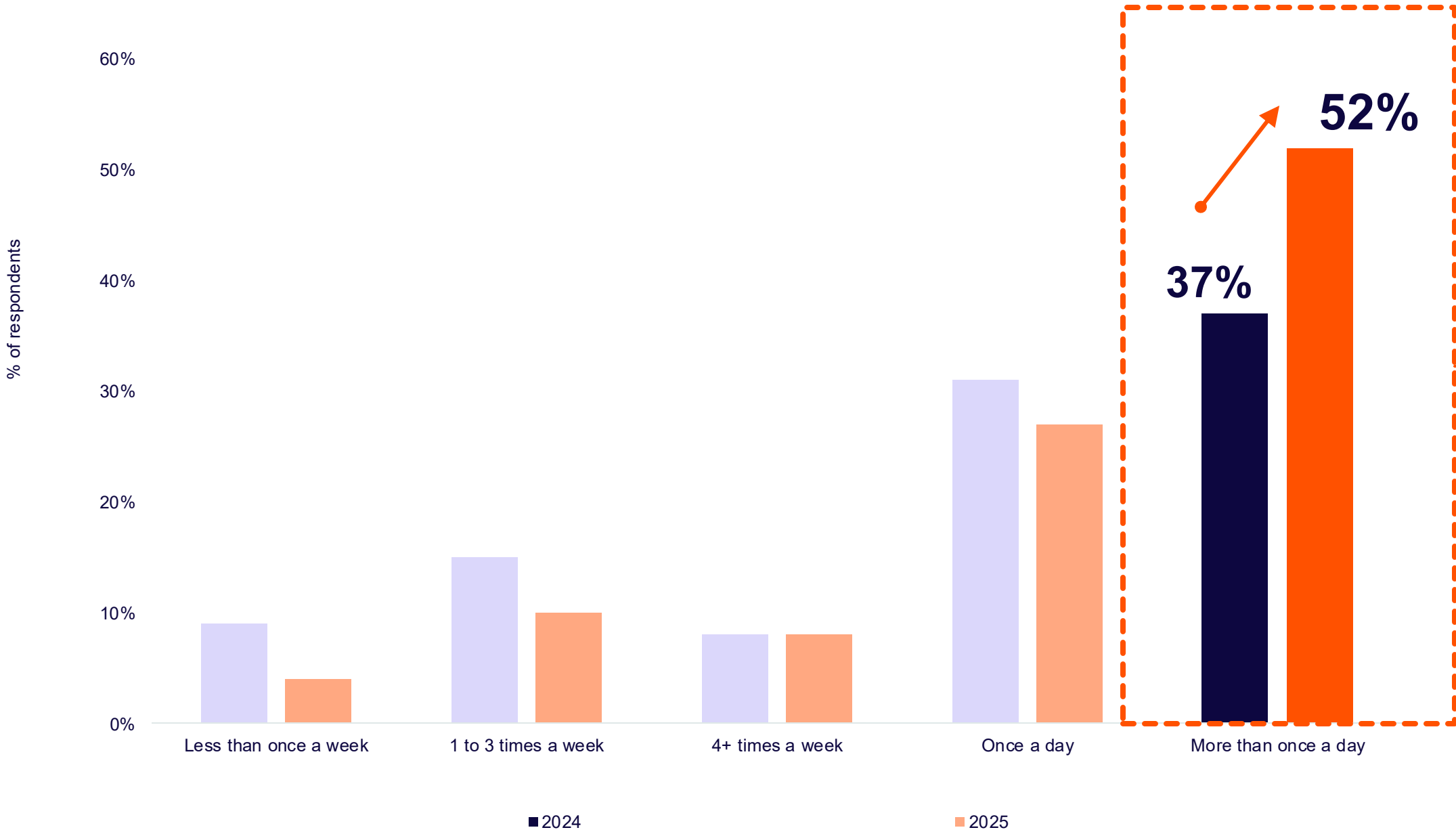
Sources: Innova Category Survey 2026, Innova Packaging Survey 2025
Notes: Q1: Why do you eat (selected category) (Select up to 5 options)? [Average of 35 countries]; Q2: Which of these labels have had an influence on your shopping decisions? (Select all that apply);
*28 categories surveyed


Snacking has become a Core Eating Habit – Led by Younger Generations


More consumers snack multiple times a day, especially Gen Z and Millennials





SNACKING FREQUENCY (2024 VS 2025)



**GEN Z****60%**

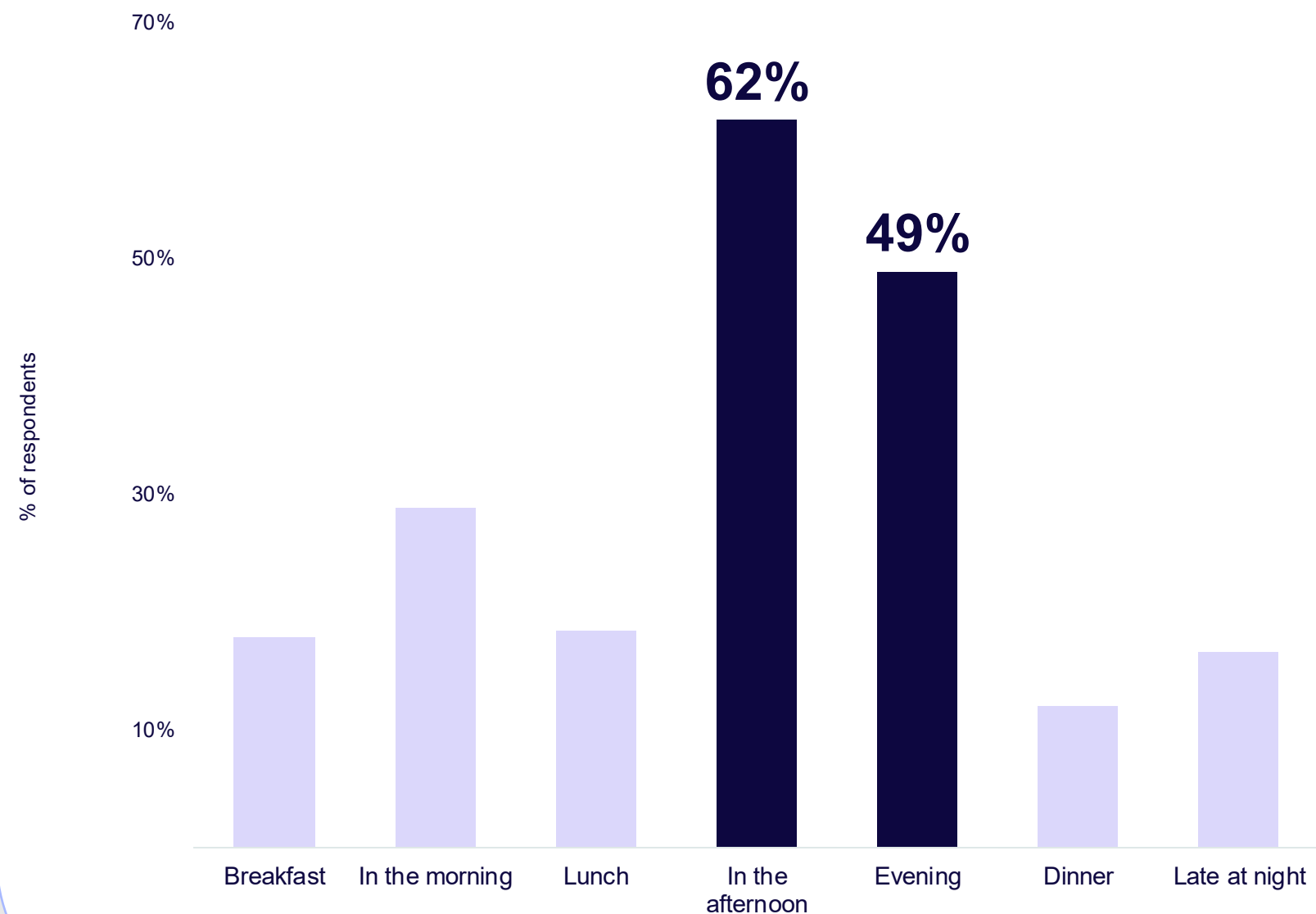
**MILLENNIALS****58%**

**GEN X****47%**

**BOOMERS****37%**

Snacking Isn't Just Between Meals Anymore – It Is the Meal

WHEN PEOPLE TYPICALLY SNACK?



Almost **2 in 5**
consumers globally say that they **replace meals**
with snacks at least once a day

Consumers Want Indulgence Without Guilt

The new rule: remove what feels harmful, add what feels natural and functional



Limit ingredients
that are bad for me

37%



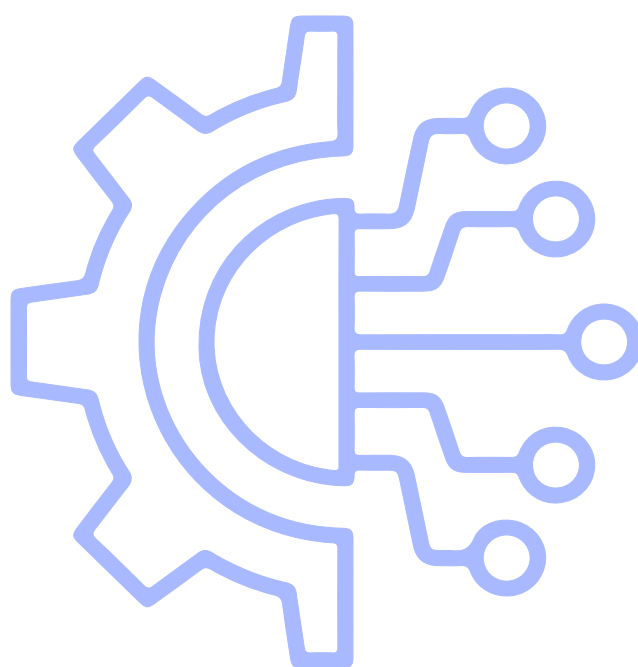
Increase the amount
of natural ingredients

23%



Add functional ingredients
that boost nutrition

22%



Limit the amount of
processing

19%

Almonds Deliver the Benefits Consumers Want Most

Protein, fiber, vitamins and minerals – naturally and in a single ingredient



THE BENEFITS CONSUMERS WANT....

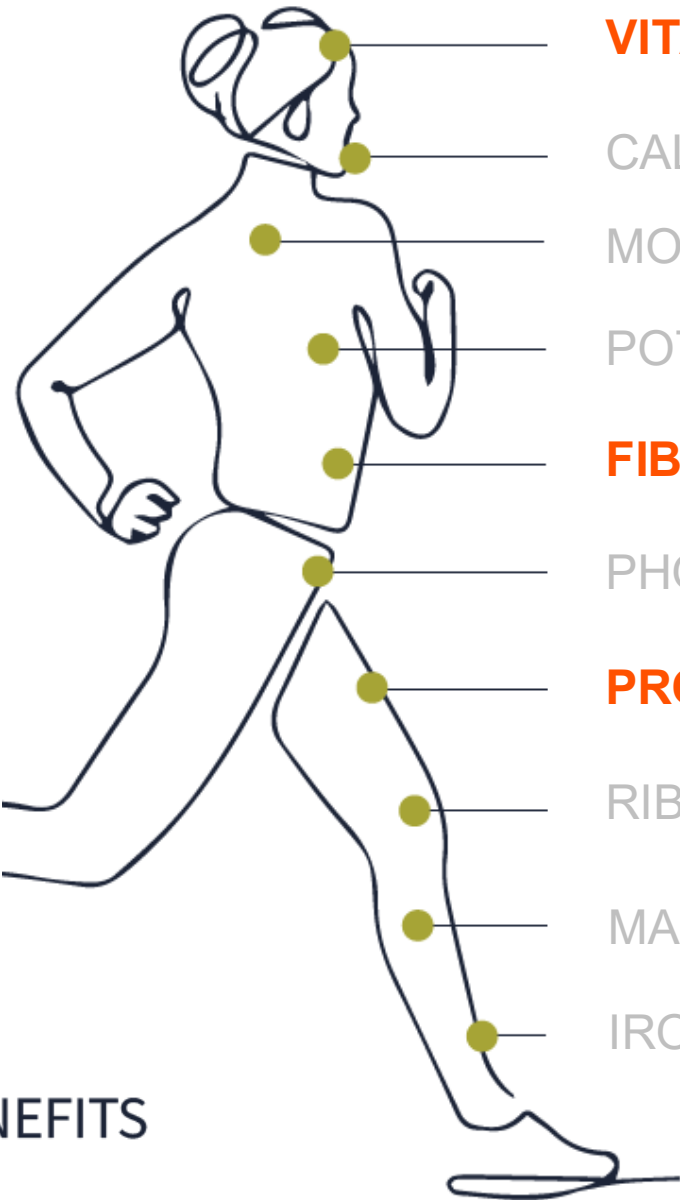
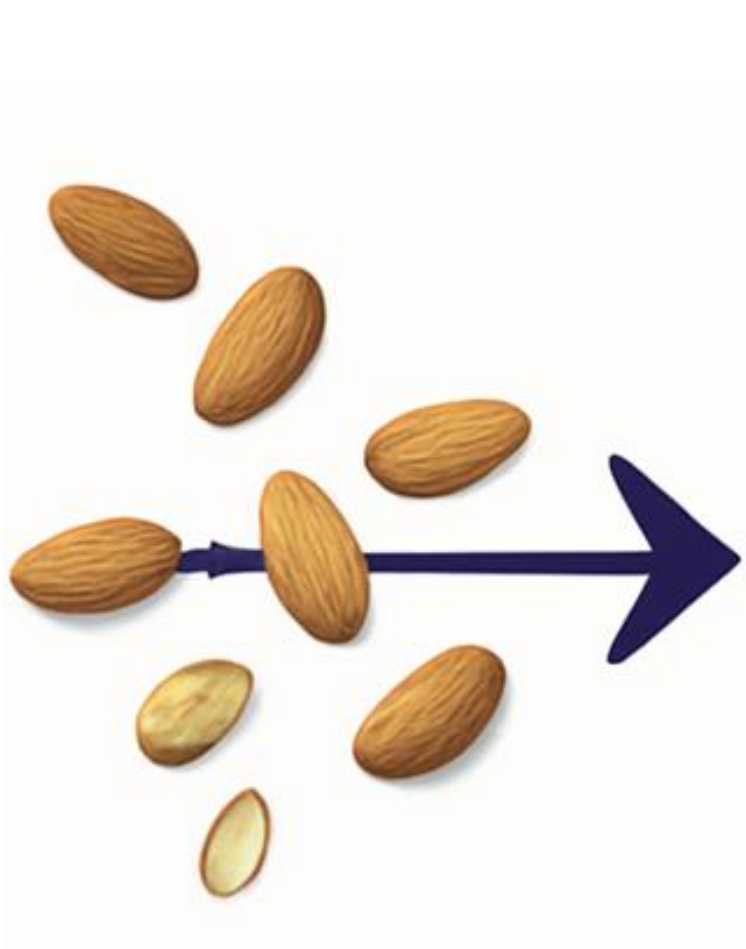
....AND HOW ALMONDS DELIVER THEM*

#1 PROTEIN (62%)

#2 FIBER (56%)

#3 VITAMINS (52%)

#4 MINERALS (36%)



VITAMIN E 7.3mg | 50% DV

CALCIUM 76mg | 6% DV

MONOUNSATURATED FATS 9g

POTASSIUM 208mg | 4% DV

FIBER 4g | 14% DV

PHOSPHORUS 136mg | 10% DV

PROTEIN 6g

RIBOFLAVIN 0.3mg | 25% DV

MAGNESIUM 77mg | 20% DV

IRON 1mg | 6% DV

HEAD-TO-TOE NUTRITIONAL BENEFITS
IN A 1-OUNCE SERVING OF ALMONDS

FUTURE OF F&B INNOVATION IS INGREDIENT DRIVEN



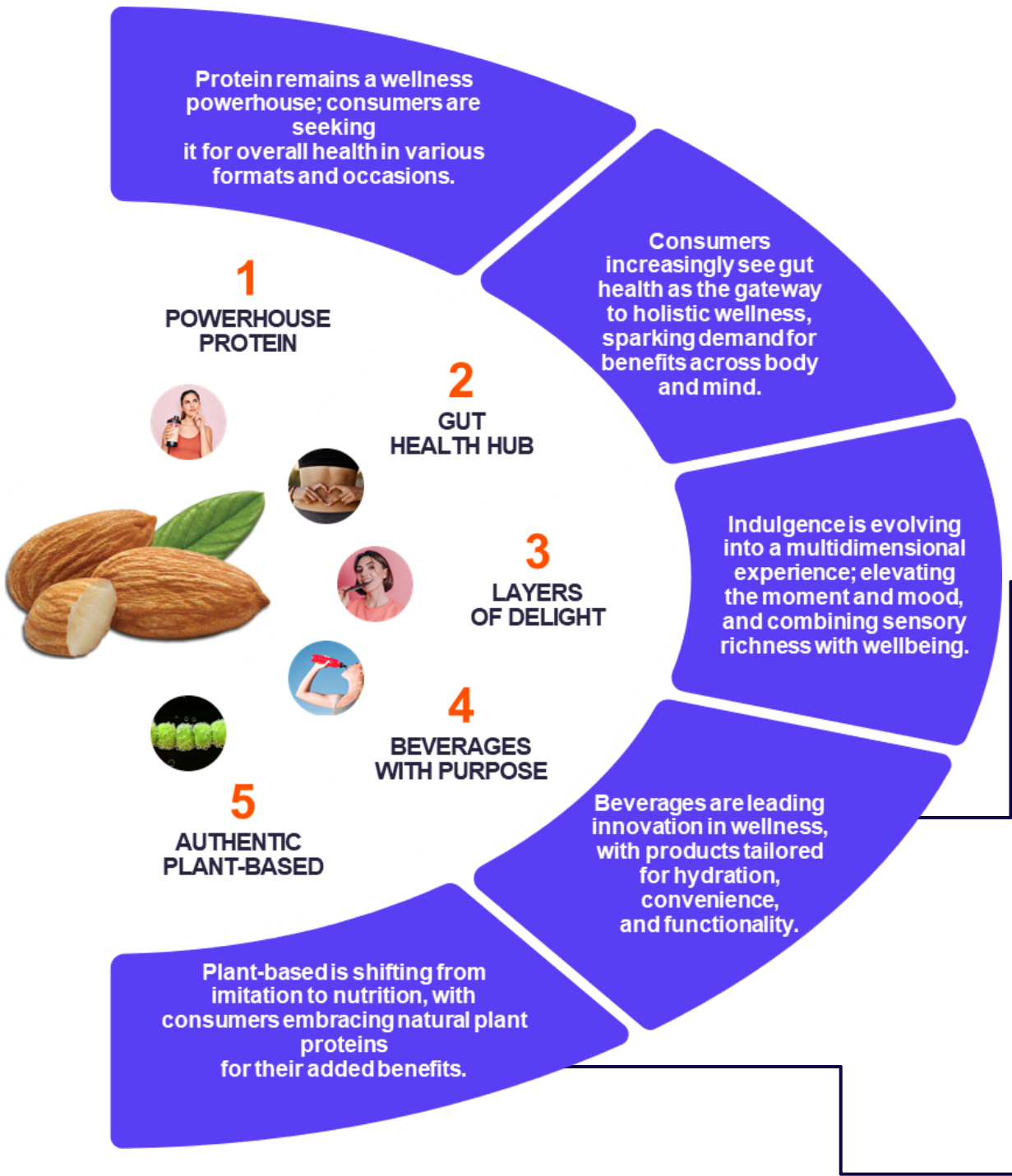
Almonds deliver across 2026's Main Ingredient Trends

From protein to fiber to sensory delight, almonds hit multiple innovation drivers



Almonds elevate Premium, Plant-Based & Purposeful Innovation

From clean-label coffee to dairy alternatives, almonds bring natural performance



South Africa, 2025

“Grown on our sun-drenched California farms”

“Non-genetically modified almond milk.”

“Naturally lactose and gluten-free”

5G PROTEIN PER SERVING (28G)

“Rosemary and thyme evoke the freshness of garden grown herbs in a delicious **almond flour cracker.**”



USA, 2025

Almonds are becoming a High-Value Ingredient Engine

ALMONDS AS AN END-PRODUCT



SNACK NUTS &
SEEDS



NUT SPREADS



DAIRY ALTERNATIVE
DRINKS

ALMONDS AS A “HERO” INGREDIENT

TOP CATEGORIES



CEREALS &
ENERGY BARS



SWEET BISCUITS
& COOKIES



BREAKFAST
CEREALS

FASTEST GROWING



SPORTS POWDERS



MALT & OTHER
HOT BEVERAGES



FLAVORED MILK

ALMOND DEMAND IS SHIFTING FROM WHOLE-NUT CONSUMPTION TO DIVERSE, HIGH-VALUE INGREDIENT APPLICATIONS

Where Almonds Started: Traditional End-Product Uses

The everyday formats now paving the way for ingredient-driven innovation



UNITED KINGDOM, 2025



***Organic roasted almonds
whole skin on (100%)***

SPAIN, 2025



Organic peeled almonds.

UNITED KINGDOM, 2025



***Filtered water, almonds, calcium
carbonate, sea salt,..., natural
vitamin E.***

Almonds as a High-Value “Hero” Ingredient

Delivering layered nutrition, texture and clean-label appeal across categories



ALMONDS AS A CORE INGREDIENT

ALMONDS AS A FUNCTIONAL UPGRADE IN TODDLER NUTRITION



Non-dairy cheese
Almond Preparation (64%)



Cereal/Energy Bars
Almond Butter 10%



Ready Meals
Almond Milk Ricotta Filling

“Almonds: primary source of protein, fat, fiber, and vitamin E”



Baby Formula/Milk
Almond butter

“Almonds are an antioxidant, **rich in healthy fats, fiber, vitamin E (brain nutrient), and magnesium** that studies show **increases metabolic control and improve insulin function amongst other benefits.**”



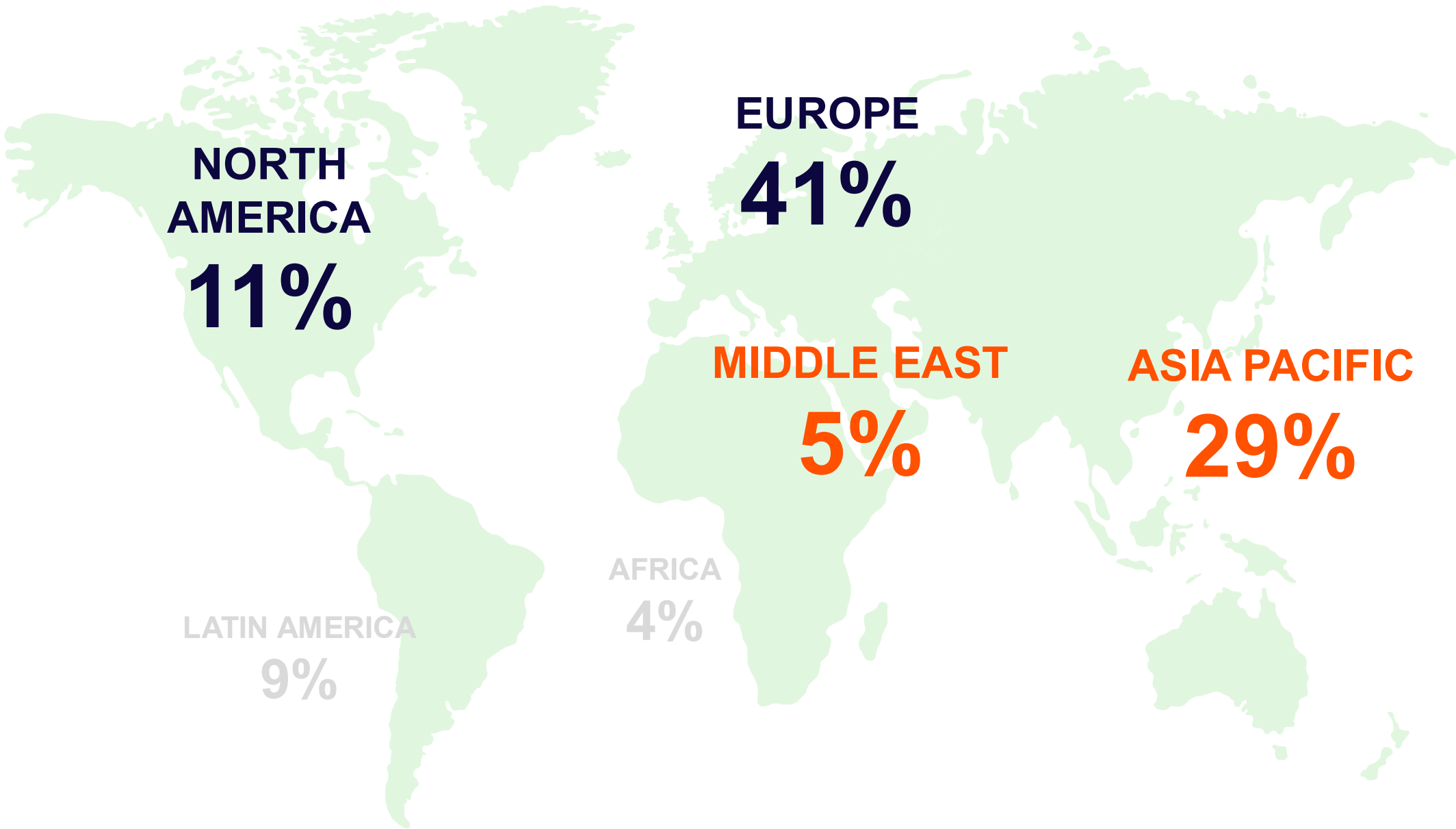
Cereal/Energy Bars
Almond butter

The Almond Opportunity Landscape is Being Redrawn

Growth shifts toward APAC, India and emerging markets



HOW IS F&B INNOVATION WITH ALMONDS SPREAD ACROSS REGIONS? [Past 12 months]



TOP MARKETS FOR INNOVATION WITH ALMONDS [Past 12 months]



Unlocking Growth in Mature Markets

Europe leads with performance nutrition; North America offers premium and functional white spaces



Big opportunity in **high-protein, clean-label, and dairy alternative** applications.



FASTEST
GROWING
CATEGORIES
[Europe]

SPORTS POWDERS ↑↑

CHEESE (NON-DAIRY) ↑

SPORTS BARS ↑



Almond Protein and **almond butter** allow brands to create **premium, nutrient-dense offerings with clean-label appeal.**



Mature almond formats need revitalization through **premiumization, functional upgrades, and hybrid innovation**



FASTEST
GROWING
CATEGORIES
[North America]

CHOCOLATE PIECES (WRAPPED) ↑

DAIRY ALTERNATIVE DRINKS ↑

SPORTS BARS ↑



Almond formats are shifting from everyday staples → **value-added formats**

Space for **performance-driven benefits** (protein, fiber, satiety)

APAC is expanding the role of almonds into Everyday Beverage Culture



FASTEST GROWING MARKETS

- 1 INDIA
- 2 INDONESIA
- 3 JAPAN

FASTEST GROWING CATEGORIES



TEA



MALT & OTHER HOT BEVERAGES



FLAVORED MILK



SPORTS BARS



NUT SPREADS

Local brands infuse almonds into familiar, culturally resonant drinks

MALT & OTHER HOT BEVERAGES

SOUTH KOREA, 2025



Almond pieces (USA)

TEA-BASED DRINKS

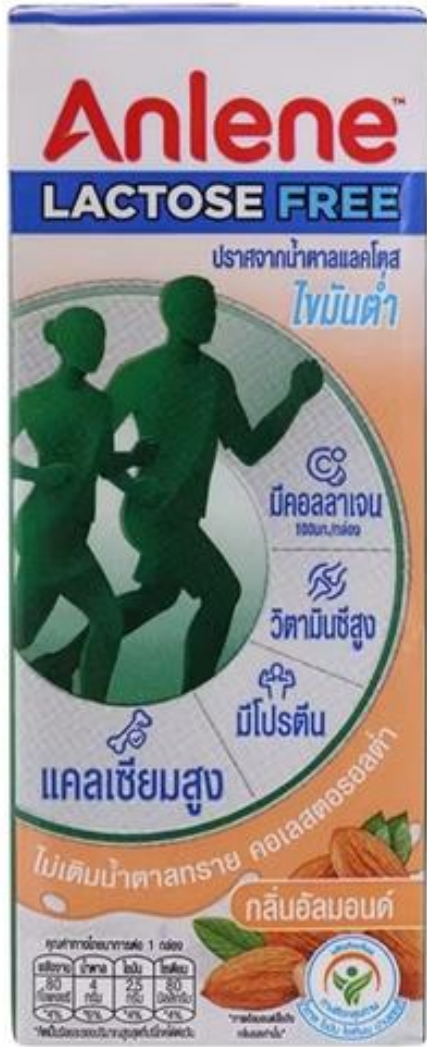
SINGAPORE, MAY 2025
(IMPORTED FROM SOUTH KOREA)



Almonds (4%)

FLAVORED AND FUNCTIONAL MILK

THAILAND, 2025



Natural Flavoring

INDONESIA, 2025



Almond Powder (0.05%)

India Becomes a Strategic Almond Innovation Market

Almonds power modern, traditional, and functional formats across categories



From Whole Nuts to Almond Ingredients that go into Packaged Foods
A High-Value Transformation for Growers

Two Almond Formats Powering the Next Wave of Growth

ALMOND PROTEIN

↑ ↑ GROWING

REGIONAL DRIVER



EUROPE + APAC

CATEGORY DRIVER:
Sports Powders;
Bars



THAILAND, 2025

“Instant pea protein, soy protein and **almond protein** beverage powder with multivitamin”

ALMOND PASTE

↑ HOLDING

REGIONAL DRIVER



EUROPE + APAC

CATEGORY DRIVER:
Dairy Alternatives;
Confectionery

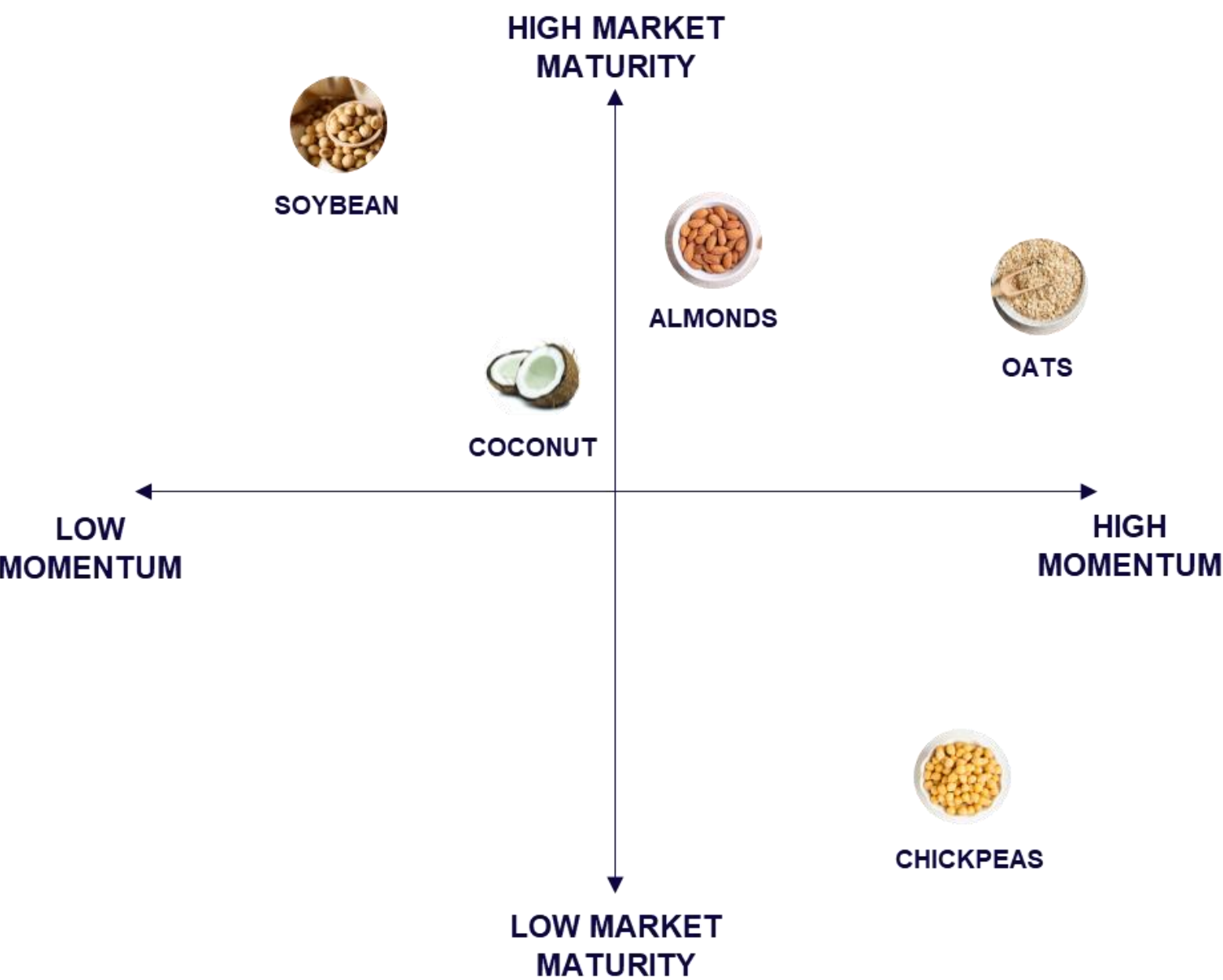


NETHERLANDS, 2025

Almond Paste (5%)

Almonds Compete in an Evolving Plant-Based Landscape

Oats, chickpeas, soy and coconut are raising the bar on functionality and storytelling



WHERE COMPETING INGREDIENTS CURRENTLY WIN?



CREAMY PERFORMANCE IN BEVERAGES
Leads in plant-based drinks and barista milks



PROTEIN WITH FERMENTATION HERITAGE
Dominant in high-protein dairy/meat alternatives;
Extremely strong in Asia



PROTEIN + GLUTEN-FREE CREDIBILITY
Fastest growth in snacks, pasta and gluten-free bakery;
Carries strong natural protein and fiber cues



INDULGENT DAIRY ALTERNATIVE BASE
Wins in plant-based yogurts, ice cream and desserts;
Creamy texture and clean-label appeal

**Almonds must continue to evolve – functionally and narratively –
to stay ahead in this competitive landscape**

Technology Will Unlock Almonds' Next Wave of Value

Processing breakthroughs are turning almonds into high-performance, multifunctional ingredients



PROTEIN + FIBER SYNERGY

- Satiety • Weight Wellness
- Better Snacks & Beverages

MICROBIOME AWARE PROCESSING

- Designed-for-Digestion
- Fiber Optimization



FERMENTED ALMOND BASES

- Texture • Digestibility
- Gut-active Components

UPCYCLED ALMOND STREAMS

- High-fiber • Antioxidants
- Sustainability Gains

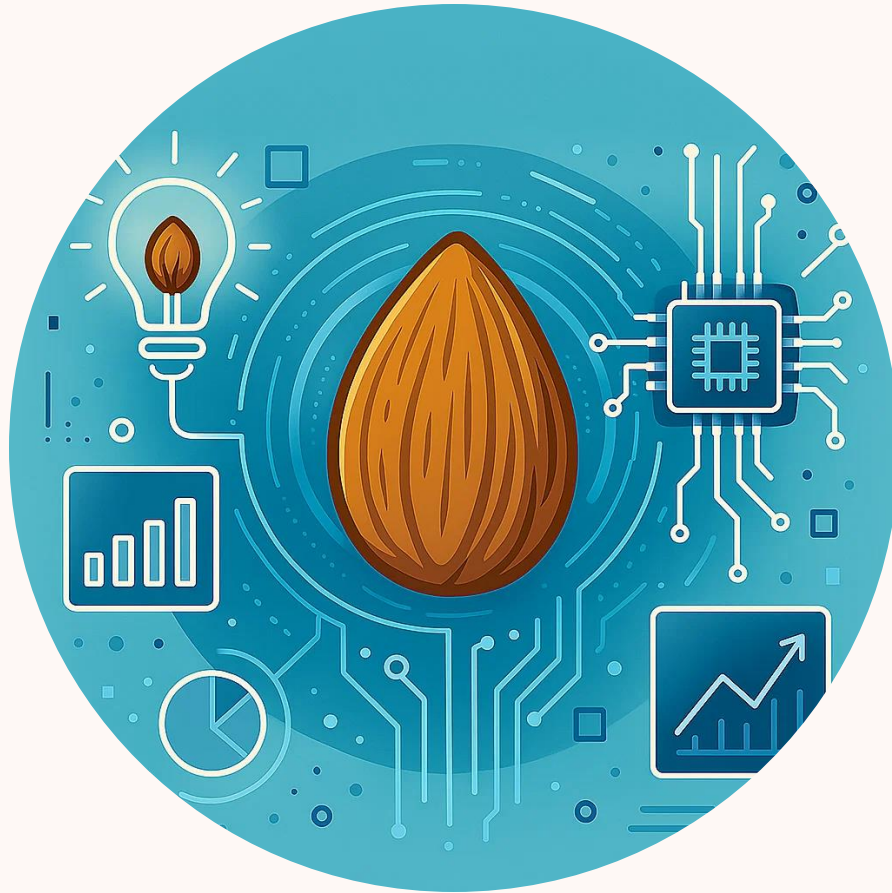
Almonds Continue to Stretch Into New Categories, Formats, and Markets



Almonds in Action



Building on strength, unlocking new value, shaping the next era of almond innovation



ALMONDS HAVE TRANSFORMED

From a commodity to a **global innovation engine.**



THE NEXT WAVE OF VALUE IS IN INGREDIENTS

Now: Protein, Paste, Flour
Future: Fermented Bases,
Upcycled Streams



FUTURE GROWTH WILL BE BUILT TOGETHER

Growers, Industry, and Partners
shaping a long-term **innovation runway.**



THANK YOU
REACH OUT TO LEARN MORE

Mail to:
contact@innovami.com

Visit:
www.innovamarketinsights.com





DRIVING GLOBAL DEMAND

Amy Cesta,

Schafer Condon Carter



AMY CESTA

Schafer Condon Carter, Chief Client Officer



WHO IS GEN Z?



THEY'RE THE PHONE EATS FIRST

GENERATION



THEY'RE THE
**PHONE
EATS FIRST**

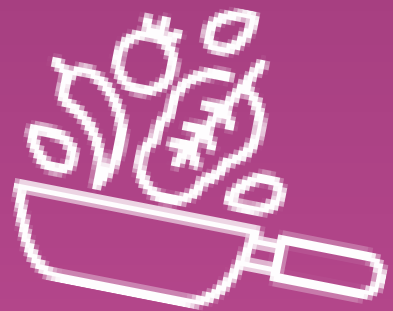
GENERATION



Winning with College & University customers

HAS LONG-TERM GAINS

COLLEGE & UNIVERSITY IS WHERE LIFELONG EATING HABITS BEGIN



Students are making their **own food choices**



GLOBALLY CURIOUS AND EXPLORATORY AUDIENCE



The segment is made up of
a **diverse group** of
consumers





GLOBAL FLAVORS

ARE THE NEW CAMPUS COMFORT FOOD

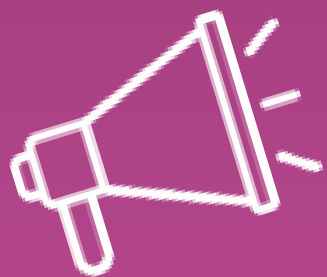
International flavors lend way to
connection, inclusivity, and
creativity



A CONSTANT CYCLE OF NEW CUSTOMERS

Making College & University **the perfect launching pad** for emerging trends

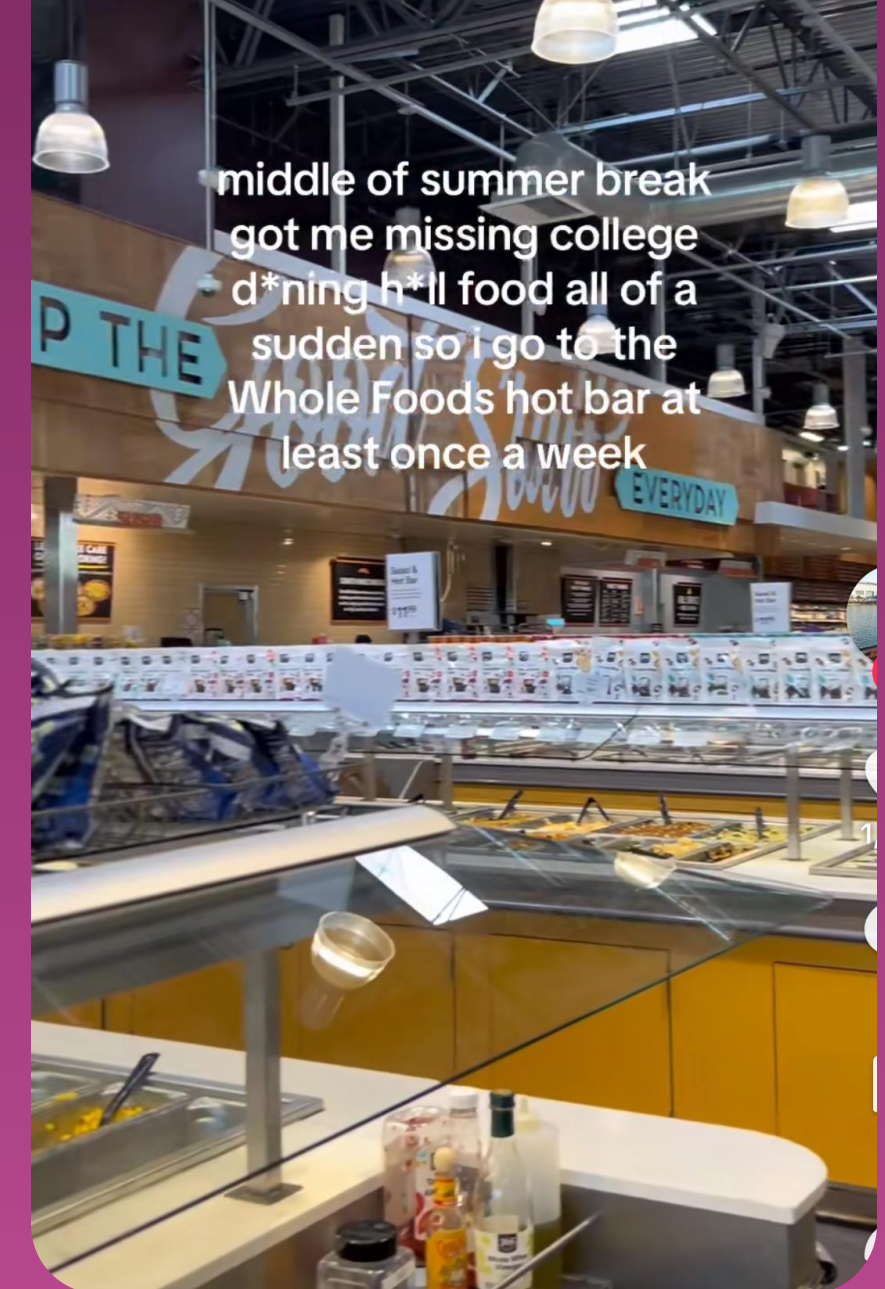
STUDENT INFLUENCE GOES BEYOND THE CAMPUS



Consumers become **lifelong advocates** for almonds across forms



**"I AM
OBSESSED
WITH
ALMONDS!"**



middle of summer break
got me missing college
d*ning h*ll food all of a
sudden so i go to the
Whole Foods hot bar at
least once a week



**realizing you miss dining
hall food:**

THE STRATEGIC POTENTIAL

of almonds within College & University

COLLEGE & UNIVERSITY PRESENTS A HUGE OPPORTUNITY FOR THE ALMOND BOARD



\$18B Industry with
Daily Engagement



Nearly **3,500**
campuses



More than **15MM students**
eating a meal on campus
daily

REACHING ONE LARGE
CAMPUS

RIVALS A REGIONAL RESTAURANT CHAIN

The University of Michigan = In-N-Out Burger



FROM DINING HALLS TO COFFEE SHOPS



Dining Hall

71% of students
visit weekly



Food Court

63% of students
visit weekly



Campus Bar

57% of students
visit weekly



Coffee Shop

65% of students
visit weekly



C-Store

59% of students
visit weekly



Food Truck

46% of students
visit weekly



Athletic Feeding

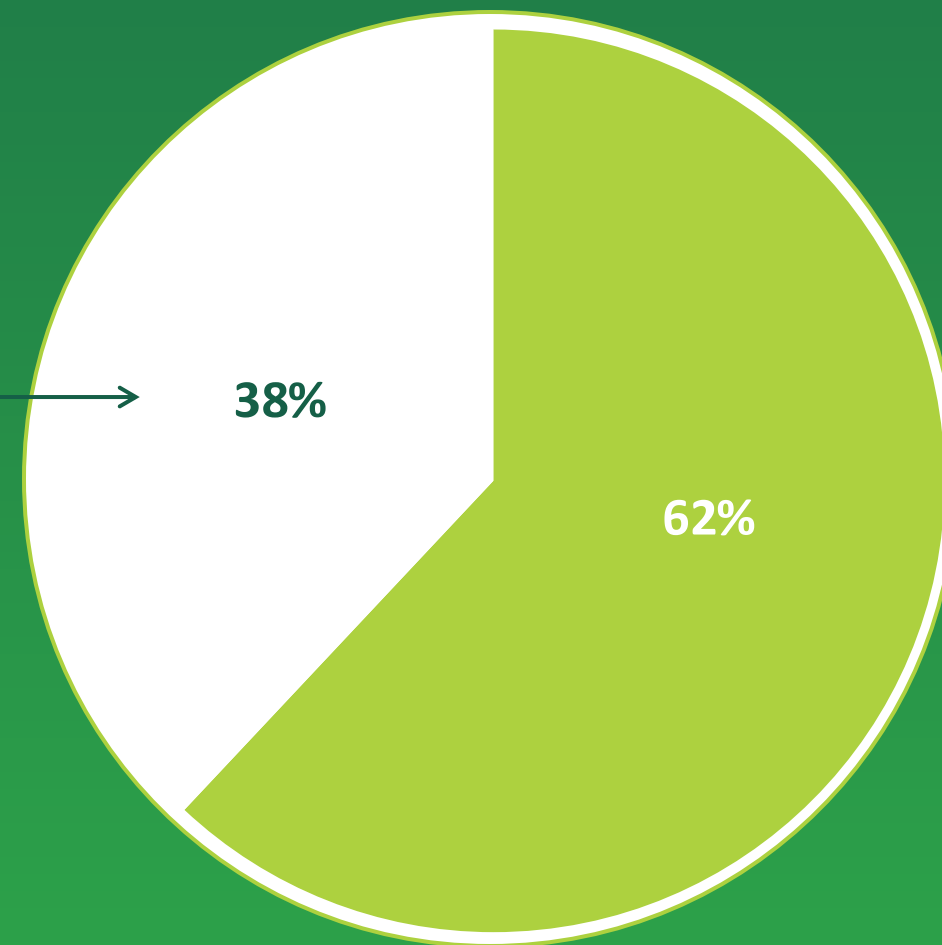
Over 520K
students in US
colleges take part
in athletics

It's made up of an abundance of locations and offerings, and every
almond form has a place to shine

OUR PROGRAM TARGETS LEADING SCHOOLS

SCHOOLS WITH REACH

Schools that enroll 20K+ students make up 38% of the total US student population¹



SCHOOLS WITH INFLUENCE



#1 College & University foodservice program in US by Princeton Review



Business Insider's top dining hall program



#2 best dining halls in US by Best Colleges

OUR 360° APPROACH

of almonds within College & University

At University of Massachusetts
Amherst

**MORE THAN
90% OF
STUDENTS**

**REPORTED AN AFFINITY FOR
ALMONDS**



REACHING OUR AUDIENCES

Connecting with College & University Operators and Consumers at



&



&





WE'RE FEEDING THE FUTURE OF ALMOND DEMAND

SHAPING
PREFERENCES



EXPANDING
USAGE



BUILDING
ADVOCACY

LET'S MAKE ALMONDS THE STAR OF THE MENU

Thank you!





DRIVING GLOBAL DEMAND

Dr. Amitoj Singh

Boston Consulting Group (BCG)



Unlocking Almond Potential in India

2025 THE ALMOND CONFERENCE
CULTIVATING A HEALTHIER FUTURE

DECEMBER 2025



Almonds as an ingredient have strong opportunity to grow ~3x over next 5 years



Almond ingredient market (Mn Lbs. 2024-2030F)



Strong Economic Momentum



Evolving Consumer Landscape



Channel Transformation



Almonds as a lifestyle staple

The background of the slide features a close-up of coffee beans, some whole and some ground, resting on burlap sacks. The scene is softly lit, with warm bokeh lights visible in the upper left corner, creating a cozy and professional atmosphere.

Strong Economic Momentum

3

India's

India comprises
of 3 different
segments based
on income profile

1

Small number of Europeans

~50 m (3.5%) people at ~\$ 45000¹



2

An Indonesia

~425 m (31%) people at ~\$ 9500¹



3

A Sub - Saharan Africa

~900 m (65.5%) people at ~\$ 3300¹



How well do we know India?

Story of Tulsi village, Raipur

What do you think is the most common occupation in this (Tulsi) village?

A Master potters, supplying to international brands like Etsy, West Elm



B Online content creators, with >40 YouTube channels



C Yoga gurus, running the largest Yoga training center in the world



D Most experienced dentists, with a 102-year-old leading the tribe



How well do we know India?

Story of Tulsi village, Raipur

B Online content creators, with >40 YouTube channels

1/3rd

Village population are content creators



>40

Educational and entertainment channels



15yr - 80+yr

Participation by all age groups, genders



Source: Indiatimes article

India's transformation isn't urban-only—it's deep, fast, and inclusive

India's Growth is Real and Fast

India's rapid digitalization, economic growth, and young demographics are creating millions of new premium consumers

1Tn+

GDP adding ~\$1 trillion
every 18 months

377Mn+

Young, digital, affluent
consumers with a median
age under 30

70%+

Tier 2–4 cities driving 70%
of consumption growth

25%+

Affluent households are
growing at about 25
percent CAGR

As India digitizes and incomes rise, there is increasing awareness and accessibility for



Healthy



Natural



Premium






and almonds sit right at that intersection

The background of the slide features a close-up of coffee beans, some whole and some ground, resting on burlap sacks. The scene is softly lit, with warm bokeh lights in the upper left corner, creating a cozy and rustic atmosphere. A semi-transparent dark red rectangle is overlaid on the center of the image, serving as a backdrop for the title text.

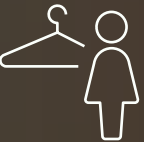


Evolving Consumer Landscape

India's consumption growth is strong – but not monotonic

Highest growth in consumption levels amongst top 5 economies

	CAGR% (2020-30F)	Consumption 2030 (\$ tn)
 >	10.3%	4.2
 >	6.2%	25.2
 >	5.6%	9.5
 >	4.0%	2.8
 >	0.1%	2.8

Discretionary consumption growing faster than essential

HH Consumption (\$ bn)	2020	2030F	CAGR%
 Discretionary >	29%	34%	12%↑
 Staples/ Necessity >	52%	44%	8.5%
 Recreational/ Experiential >	19%	22%	11.7%

Note: Private consumption expenditure at current market prices in US\$ (Nominal private consumption). Source: Oxford Economics

Affluence-driven shifts are transforming food consumption across India, in both urban and rural markets



Source: Household consumption expenditure survey 2022-23

5 key megatrends shaping the consumer landscape within food & beverage sector

1

Health and wellness

Clean label snacks have grown from ~10% of total snack launches in 2017 to ~20% in 2021; 800+ D2C brands focusing on health and wellness

2

Premiumization

40%+ of FMCG value growth coming from premium offerings

3

Natural and sustainable

30%+ of urban consumers now prefer natural products

4

Convenience

RTE and RTD categories growing by 40%+ in five years

5

Product innovation

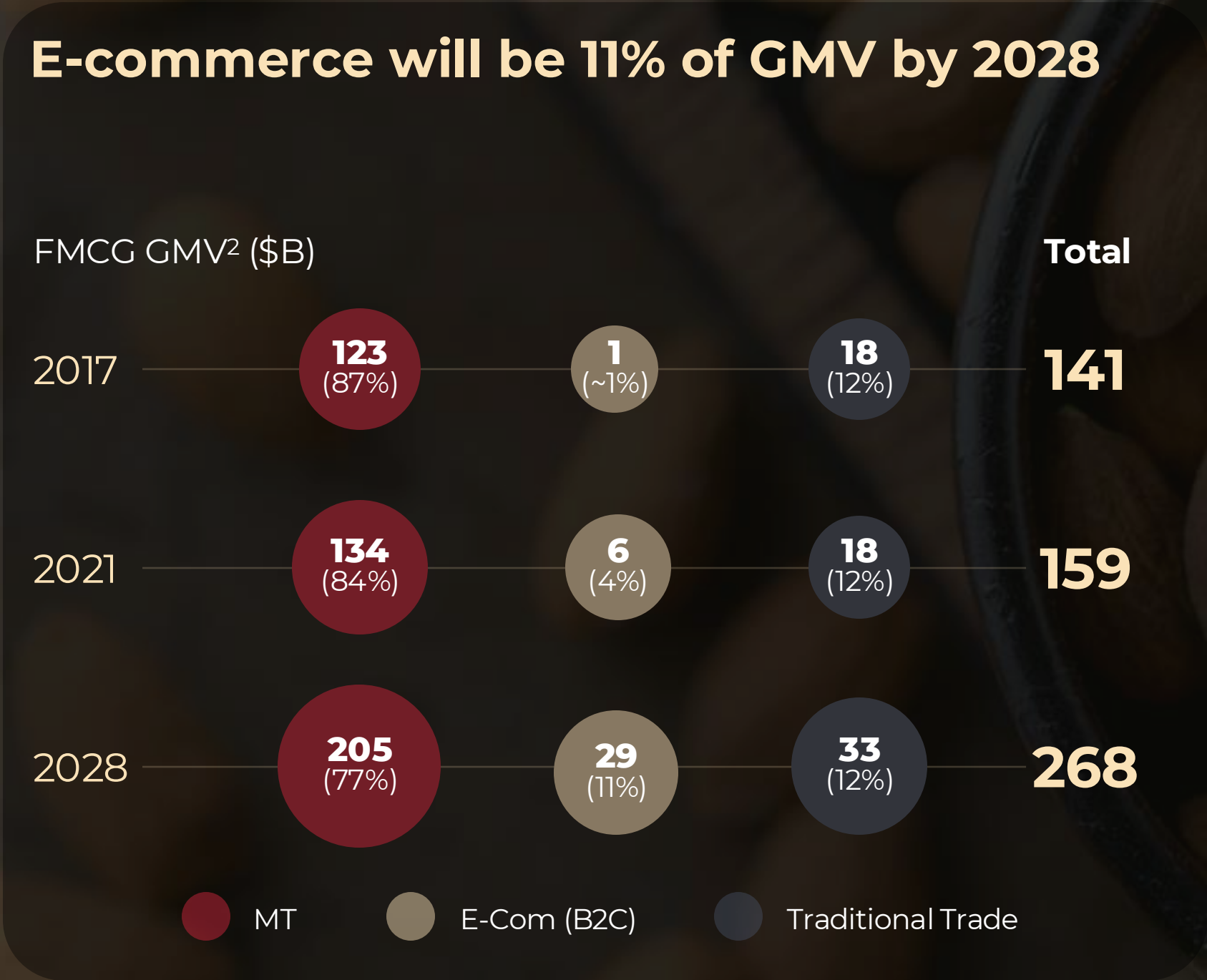
Indian CPG and D2C brands across beverages, snacks, and bakery.

The background of the slide features a close-up of dark, roasted coffee beans. Some beans are in sharp focus in the foreground, while others are blurred in the background. In the lower right, a portion of a burlap sack is visible, showing its coarse, woven texture. The upper left corner is filled with soft, out-of-focus bokeh lights in warm yellow and orange tones, suggesting an indoor setting with ambient lighting. A semi-transparent dark red rectangle is overlaid on the left side of the image, serving as a backdrop for the title text.

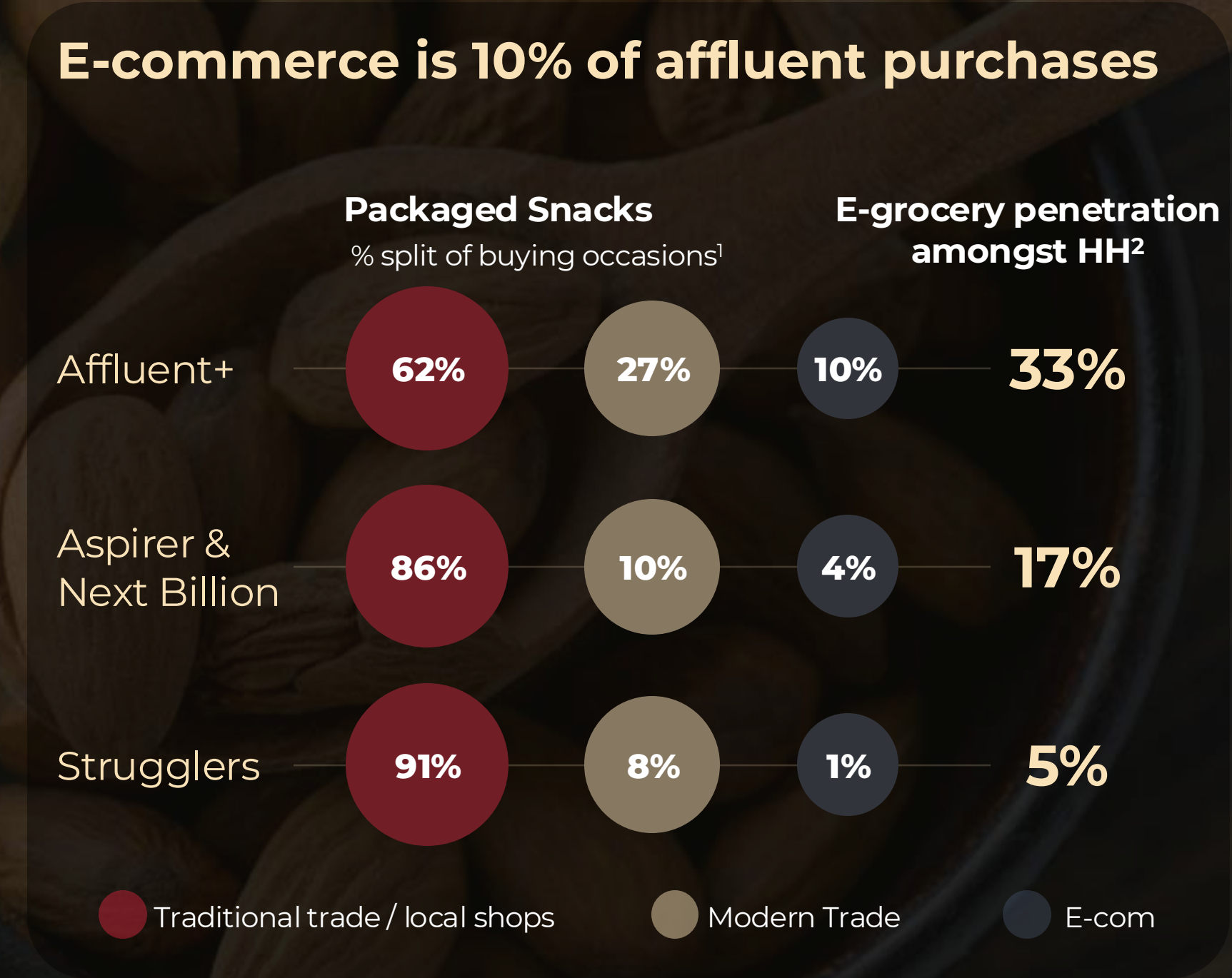
Channel Transformation

The retail ecosystem is modernizing fast with e-commerce driving awareness and access

E-commerce will be 11% of GMV by 2028



E-commerce is 10% of affluent purchases



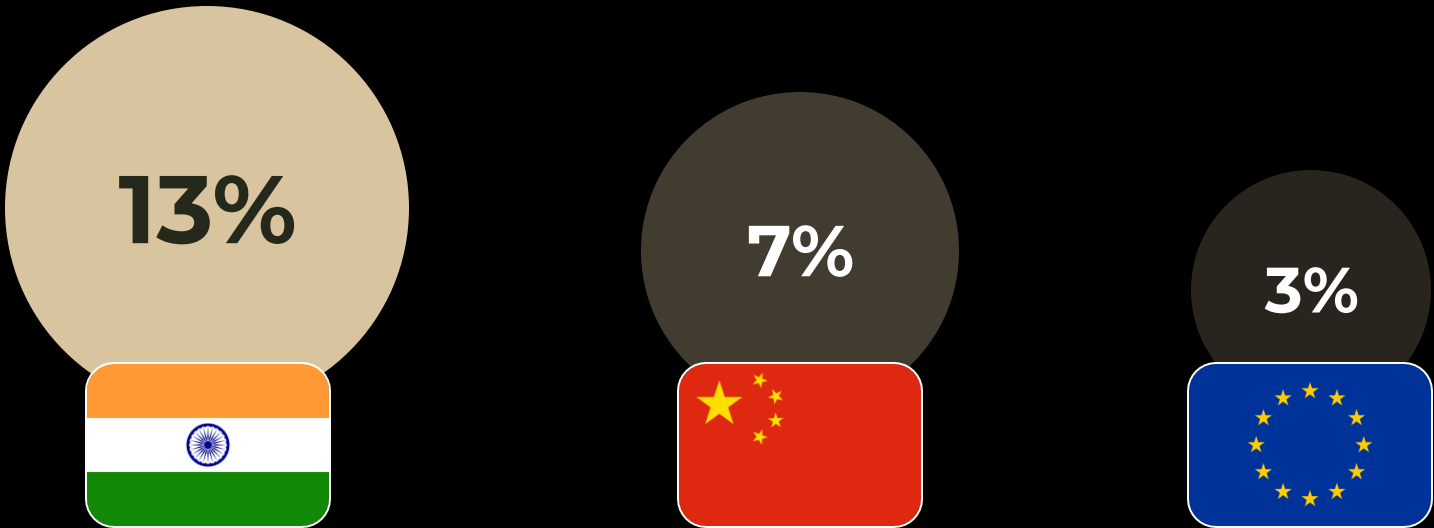
Basis response to the following questions: Can you tell me through which of the following channels have you purchased packaged snacks in the last month?
Data of urban consumers shown. Affluent & Elite and Aspirer & Next Billion combined respectively by weighing share of buying occasion by population
Next Billion e-grocery penetration assumed to be 3x of Strugglers in proportion with 2022 penetration of e-com purchase of packaged snacks in the segments
Source: Euromonitor, Industry Interviews, BCG Analysis, Credit Suisse 2022, CCI Survey (Dec 22 – Jan 23)

Quick-commerce penetration higher than China, expected to be \$3B by 2025

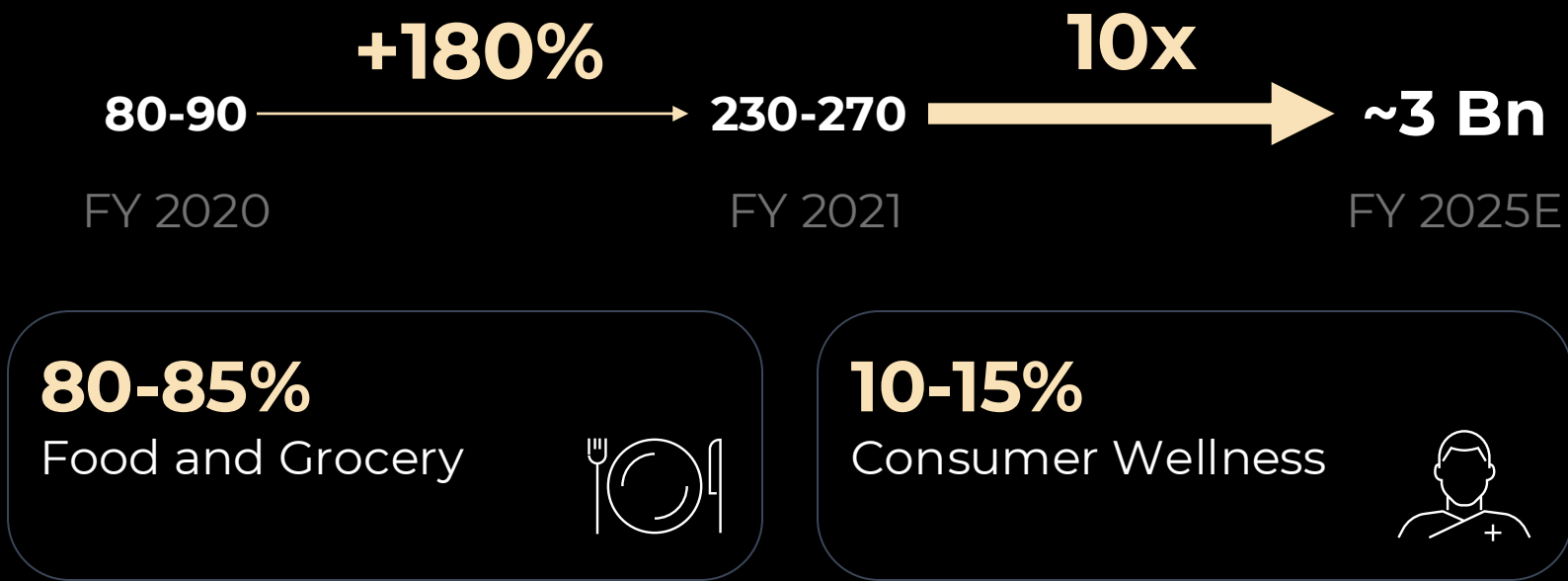
India leads in Q-Com penetration tapping into the need for instant gratification

GMV grew by 30x in ~5 years
Food & Grocery being the largest category

Quick Commerce Penetration (% of Online Grocery)



GMV (\$ M)



3 well-funded players in Q-com



1. Share estimated basis annual run-rates expected for FY22 2. Realized as well as earmarked 3. Green– High relevance, Yellow– Low to medium relevance
Source: Redseer, Industry Interviews, Press Search, BCG Analysis, USD to INR considered: 82

A close-up photograph of a burlap sack filled with almonds. The sack is positioned in the lower right, with its rough texture clearly visible. The almonds are dark brown and some are in sharp focus, while others are blurred. The background is dark with warm, out-of-focus bokeh lights in shades of yellow and orange, creating a cozy, rustic atmosphere.

Almonds as a lifestyle staple

Almonds are already part of daily life

~100–110 million lbs across beverages, snacks, bakery, and nutrition

~10M

Bakery, cafes, Sweet &
snack QSR

**Food Service
Organized**



~9M

Local Sweet Shop

**Food Service
Unorganized**



~77M

Ice cream, sweet
spreads, breakfast cereal,
snack bar, etc.

**CPG
Food**



~13M

Hair care and
skin care

**CPG
Non-Food**



To unlock the ~3x growth opportunity, coordinated action required across 4 key areas

1

Drive excitement through a refreshed consumer campaign to strengthen pull and expand the category

2

Equip product developers with education, inspiration, and resources via trade shows, conferences, and industry forums

3

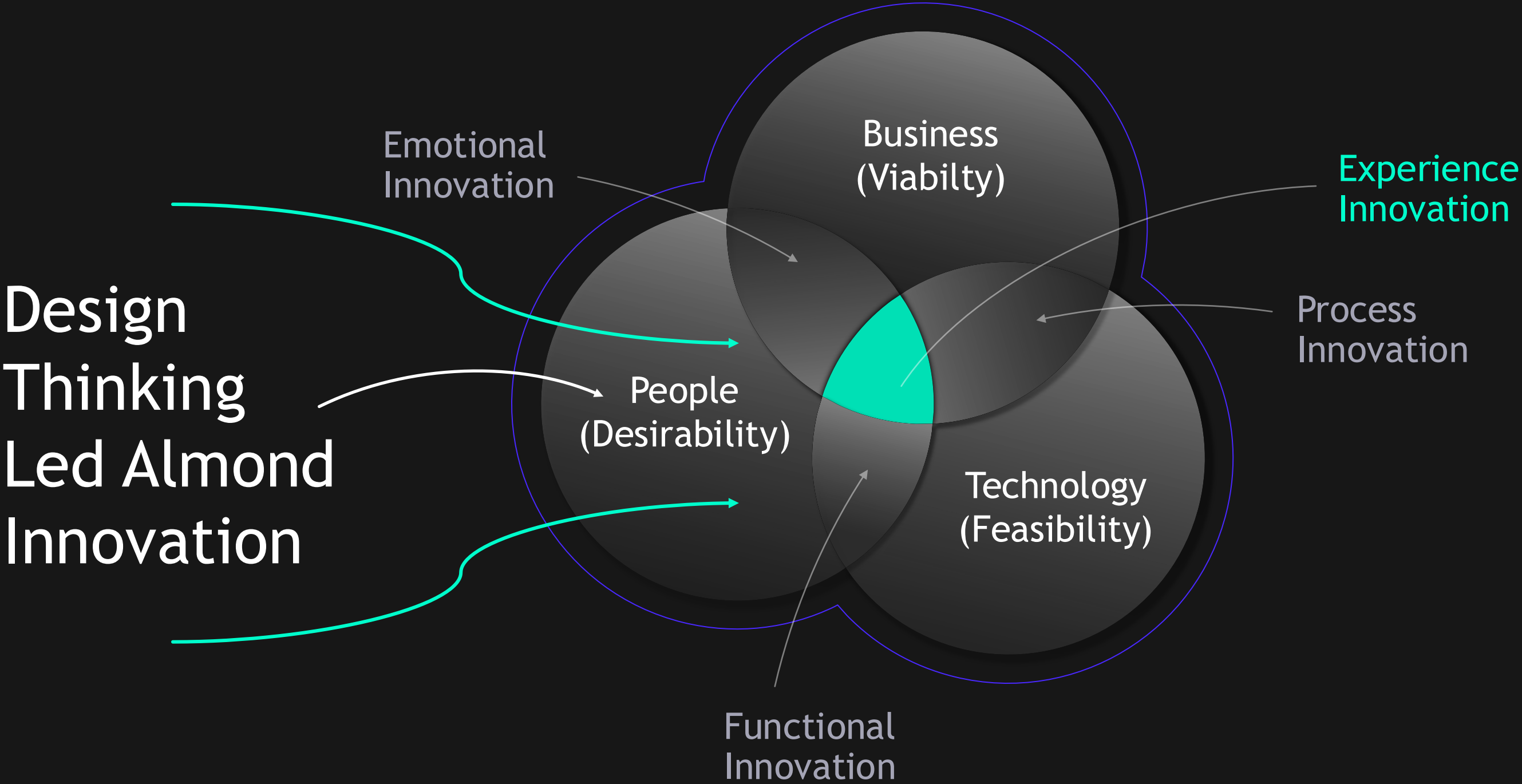
Engage with key government and food-science institutions to shape labeling norms and strengthen category credibility

4

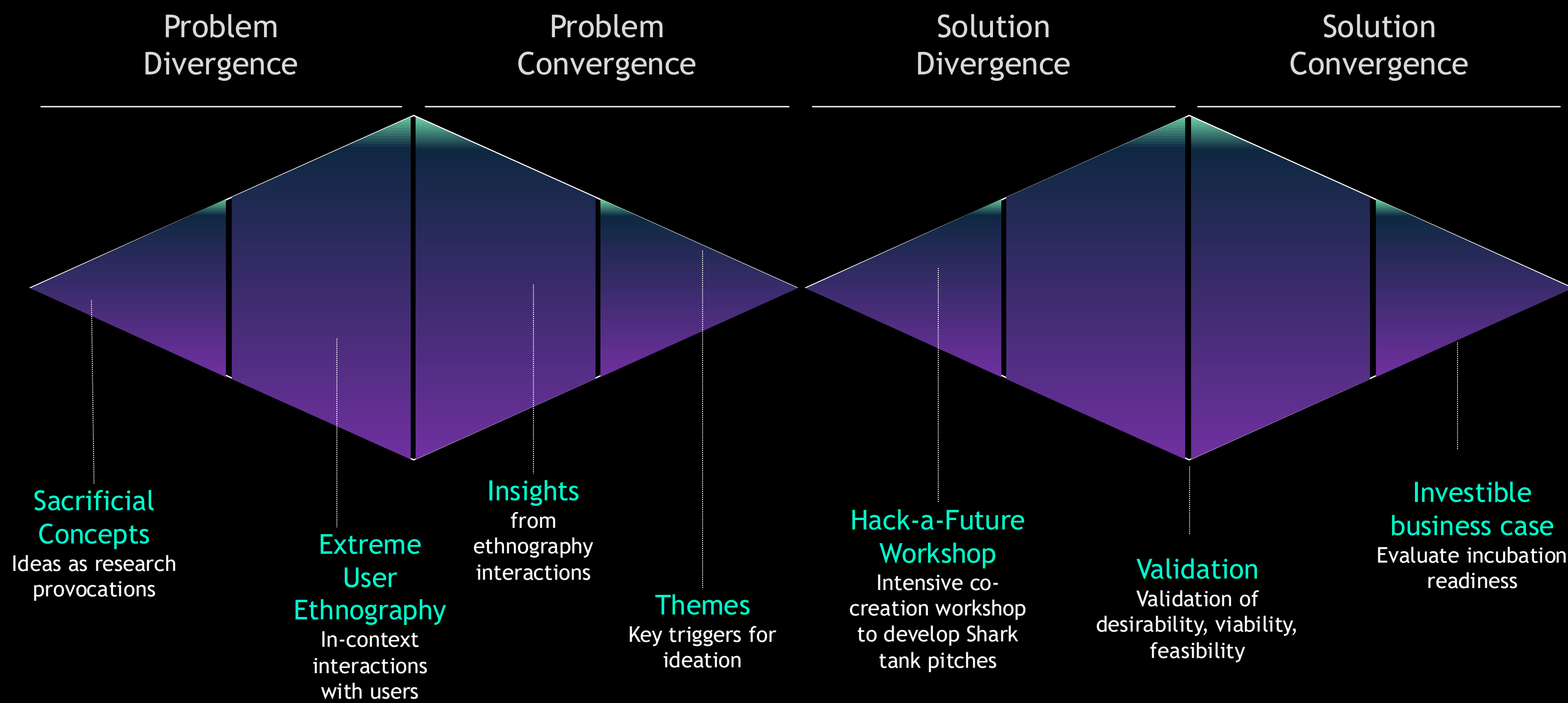
Collaborate with leading foodservice partners and brands to co-create high-volume products for a new generation of consumers

In collaboration with BCG

Almond Innovation at the intersection of Business, Consumer & Technology



Double Diamond Design thinking methodology for Almond innovations



5 Key Innovation Themes basis 50+ Consumer Insights

Theme 1

Make unhealthy, healthy and tasty

Health-conscious consumers aren't looking to replace indulgence; they are looking for ways to justify it. Almonds serve as a convenient health pass, making indulgent foods feel permissible. However, when indulgence is made "too healthy," it loses its appeal.

The opportunity lies in flipping this equation: How can almonds elevate the health quotient of indulgent foods without stripping away the pleasure of indulgence?



Theme 2

Almond milk is beyond milk

Almond milk sits at the intersection of expectations and reality, caught between traditional dairy and nostalgic Indian flavors. This friction arises from consumers wanting familiarity while seeking healthier alternatives.

The opportunity is to reposition almond milk as a premium beverage—not just a substitute but a redefined experience, offering unique taste, nutrition, and versatility across occasions.



Theme 3

Invisible break limit

Almonds face an invisible but visibility. When obvious by taste fatigue or dislike embedded into products driving higher consumption.

The opportunity lies in incorporating them into taste and nutrition without

5 key Innovation Themes basis 50+ Consumer Insights

Theme 3

Invisibility breaks the limit

Almonds face an invisible barrier—not in availability but visibility. When obvious, consumption is capped by taste fatigue or dislike. But when seamlessly embedded into products, these barriers disappear, driving higher consumption.

The opportunity lies in making almonds "invisible"—incorporating them into foods where they enhance taste and nutrition without standing out visually.

An illustration of a man's face in profile, looking at a slice of cake held in a hand. A speech bubble from him says, "This is such a tasty cake, I'm loving it!". The cake is a multi-layered cake with white frosting and brown layers, and a small almond is visible on top.

Theme 4

Traditions limiting, science unknown

Cultural habits limit almond intake, with tradition capping consumption while science suggests higher quantities for greater benefits.

The opportunity is to bridge this gap by educating consumers on evidence-backed advantages.

Reframing almonds as a scientifically supported superfood can shift perceptions and drive higher consumption.

An illustration of a woman and a young boy in a kitchen. The woman is holding a small bowl of almonds and talking to the boy. A speech bubble from her says, "Almonds aren't like peanuts, beta. Don't eat too many". The background shows a kitchen with various items on the counter and shelves.

Theme 5

Occasions justify premium

Almonds straddle staple home yet reserved for a

Consumers pay a premium for occasions, gifting, or indulgence, and hesitate in daily use.

The opportunity lies in creating experiences that justify exclusivity, ritual, or indulgence.

An illustration of a woman holding a bowl of almonds. A speech bubble from her says, "Almonds aren't like peanuts, beta. Don't eat too many". The background is dark and out of focus.

5 key Innovation Themes basis 50+ Consumer Insights

Theme 4

Traditions limiting, science unknown

Cultural habits limit almond intake, with tradition capping consumption while science suggests higher quantities for greater benefits.

The opportunity is to bridge this gap by educating consumers on evidence-backed advantages.

Reframing almonds as a scientifically supported superfood can shift perceptions and drive higher consumption.

Almonds aren't like peanuts, beta. Don't eat too many



Theme 5

Occasion justifies premium

Almonds straddle staple and luxury—stored at home yet reserved for a special day.

Consumers pay a premium for almonds in social occasions, gifting, or indulgent sweets but hesitate in daily use.

The opportunity lies in tying almonds to experiences that justify higher value—through exclusivity, ritual, or indulgence.

No, no... let's save these almonds for the festival!



Innovation Sprint with leading coffee chain

Delivered 30+ new product ideas, with 10+ prioritized for development









DRIVING GLOBAL DEMAND

Emily Fleischmann

VP, Global Market Development

Roll Video

