



2017

THE ALMOND CONFERENCE

INVESTING ACROSS THE GLOBE

Room 306-307 | December 5 2017



CEUs – New Process

Certified Crop Advisor (CCA)

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

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

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

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



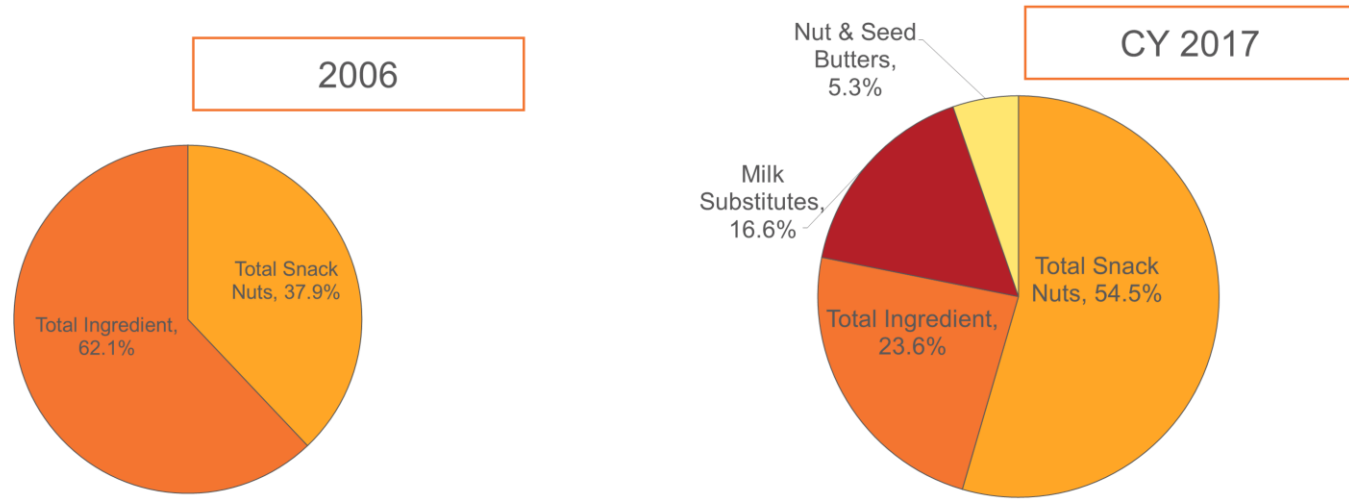
INVESTING ACROSS THE GLOBE

 californi
almonds



ABC PROGRAMS HAVE EVOLVED

INGREDIENT TO SNACK TO BOTH



**PURE ALMOND PRODUCTS
NOW DOMINATE SALES**



**“ALMONDS
ARE A THING”**

FOCUSING ON CORE BENEFITS

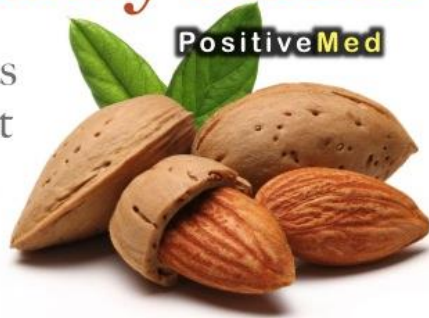
1. **Skin and Beauty** in Asia
2. **Mental acuity** in India
3. **Lifestyle** in the West



Almonds are healthy snacks:

Having almonds in your diet as snack may help to fight against diabetes and heart disease:

Almonds help to increase insulin sensitivity in people with higher risk of diabetes.



ABC ISN'T ALONE

Top 10 Benefits of Almond Nuts



MEASURING SUCCESS



Health Perceptions



Almond Snacking Usage

= **AVQ**

Almond Value Quotient
(Average of Combined
Health and Snacking scores)

- A Key Measurement of Consumer Attitudes
- A ROI Analysis Tool



MEASURING SUCCESS

- **Measuring Perception changes and Program Effectiveness:**
 - Attitudes, Awareness and Usage Studies
 - Advertising testing and evaluation
 - Consumer Qualitative and Ethnographic deep dives



EVALUATION OF ALMOND SHIPMENTS AND CONSUMER SALES

- Shipments
 - ABC Position Report
 - Global Trade Atlas
 - Sales data
- Trended over time
 - 5 and 10 years
 - Percent shipments
 - Shipments vs. spending
- Sales data
 - Changes vs. prior year



**BUT...
THE WORLD IS CHANGING**

An aerial photograph of a massive, dense crowd of people, likely at a large-scale event or festival. The crowd is composed of individuals of various ages and ethnicities, creating a colorful mosaic of clothing and accessories. The perspective is from directly above, looking down on the sea of people. A prominent red horizontal bar is overlaid across the center of the image, containing white text.

10.9 Billion People by 2050



**CHANGES IN THE
CLIMATE AND CASCADING
ENVIRONMENTAL EMERGENCIES**



BIG FOOD UNDER FIRE

New demands for...
trust and transparency
food safety
food quality



REDUCING FOOD WASTE

11.24.17

The Future Of Retail In The Age Of Amazon

As Jeff Bezos's juggernaut continues to grow, forward-thinking competitors are finding creative ways to succeed—and be what Amazon can never be.



Google and Walmart Partner With Eye on Amazon

By DAISUKE WAKABAYASHI and MICHAEL CORKERY AUG. 23, 2017



Alibaba smashes its Single's Day record once again as sales cross \$25 billion

Posted Nov 11, 2017 by [Jon Russell \(@jonrussell\)](#)



Alibaba has set another Single's Day record after the e-commerce giant sold over \$25 billion of product on the Chinese biggest online shopping date.



RISE OF WOMEN

DHABA CAFE

CHAT CHAT RE[®]
It's Mouth Ticking Chaat

Pizza
डाभा
Pizza & More...

डाभा कॅफे

NEW TASTE IMPERATIVES
AMPLIFYING FOOD EXPERIENCES

DHABA CAFE

Indori taste in Mumbai -
bringing to you
Indori Poha at just Rs.20/-
&
Sabudana Vada
at Rs.10/-

First ever
MUMBAI SHOWROOM IN
exclusive Chaat Cuisine
with
Katori Chaat at Rs.45/-
& Cheese Triangle
Chaat at Rs.50/-





SCIENCE OF TASTE

1. BUILD ON OUR GLOBAL STRENGTH

- Leverage global appeal and demand of product

2. ELEVATED DEFINITION OF HEALTH

- Build on leadership position to take almonds to broader health benefits - Healthy for me, my planet
- Mediterranean food, grown in Mediterranean climate

3. GLOBAL MARKETING AND REPUTATION MANAGEMENT

- Research-based
- Share the journey, not just final research
- Be personable and real



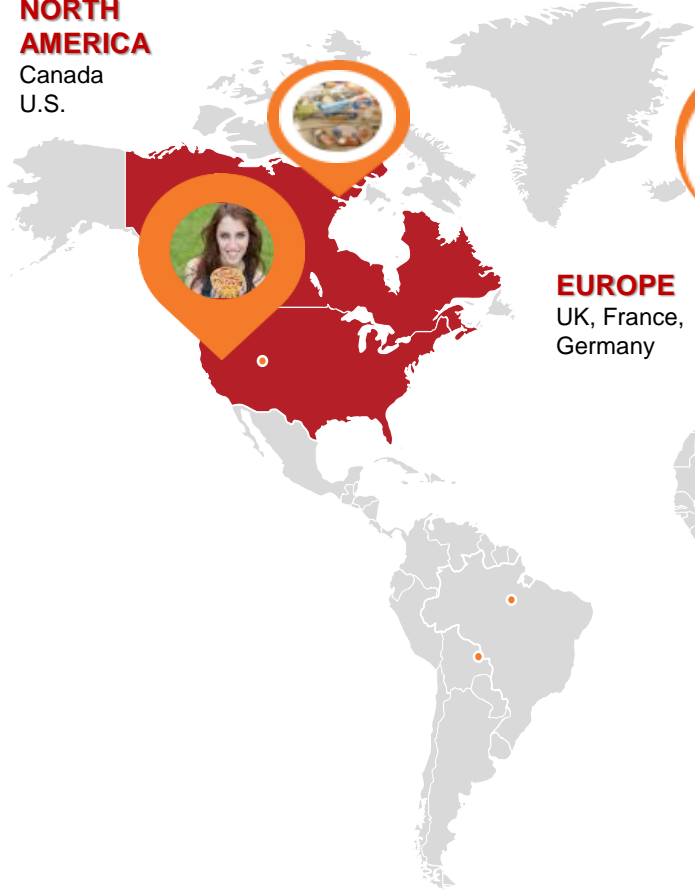
**ALMOND MARKETING
TODAY AND TOMORROW**

The background features several antique globes. The most prominent one in the foreground shows the Americas, with labels like 'AMERIQUE SEPTENTRIONALE' and 'AMERIQUE MERIDIONALE'. Other globes in the background are partially visible, some showing the word 'INDE'. The scene is dimly lit, with a bright light source from the left creating a lens flare effect. The text 'MARKET PRIORITIZATION' is overlaid in a bold, orange font, enclosed in a thin orange rectangular border.

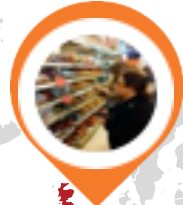
MARKET PRIORITIZATION

**NORTH
AMERICA**

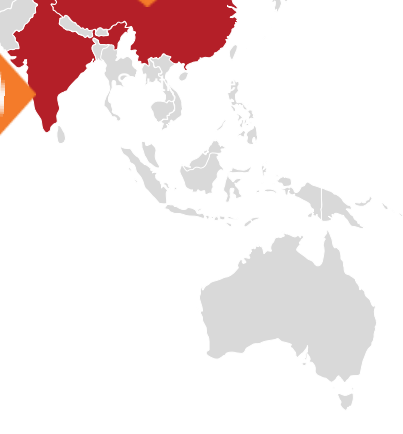
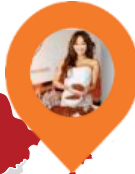
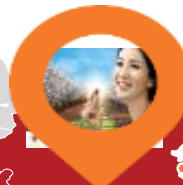
Canada
U.S.



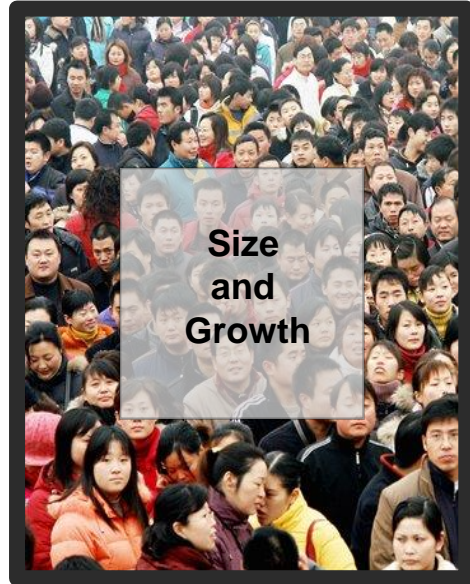
EUROPE
UK, France,
Germany



ASIA
China, India,
S. Korea



EVALUATING MARKET OPPORTUNITIES



EVALUATING MARKET OPPORTUNITIES

- This includes analysis of the following:
 - **Exchange rate** shifts
 - **Media inflation**
 - Review the Spending vs. Demand Share Index
 - **Messaging** penetration, message saturation and relevancy
 - **Political environment** and unrest
 - **Tariff** swings

All of these factors play an important role in ABC's investment recommendation for individual market funding



MAKING FINAL INVESTMENT DECISIONS

2017-2018 Global Market Development Committee

Members:



Craig Duerr
Chair
Campos Brothers
Farms



Al Greenlee
Vice Chair
Blue Diamond
Growers



**Brian
Wahlbrink**
Sperry Farms



Darren Rigg
Minturn Nut
Company



Dinesh Bajaj
Select Harvest



Jeff Smith
Blue Diamond
Growers



Brian Ezell
Wonderful
Pistachios and
Almonds
Suzanne
Hagener

Blue Diamond Growers

Christine Lott
Blue Diamond Growers



Matt Mariani
Mariani Nut
Company

Bobby McCuan
Blue Diamond Growers

Paul Ewing
RPAC Almonds



Maya Erwin
Blue Diamond
Growers

Jared Smith
Fisher Nut Company

Keith Kwan
Taylor & Sims, Inc.



Warren Cohen
Blue Diamond
Growers

Caleb Gervase
Van Dуйn Farms, Inc.

Sim Bathth

Alternates:

Alexi Rodriguez
Campos Brothers Farms

Bill Morecraft
Blue Diamond Growers

The image features several antique globes of varying sizes, some in sharp focus and others blurred in the background. The globes are illuminated from the side, creating a dramatic play of light and shadow. A prominent globe in the foreground shows detailed cartographic markings, including latitude and longitude lines, and ornate decorative elements. A white rectangular border frames the central portion of the image, containing the text 'KEY MARKETS'.

KEY MARKETS

A photograph of the Golden Gate Bridge in San Francisco, California. The bridge's iconic red-orange towers and suspension cables are the central focus, set against a backdrop of green hills and a clear sky. The bridge is partially obscured by lush green trees in the foreground. A semi-transparent orange banner with a white border is overlaid across the middle of the image, containing the text.

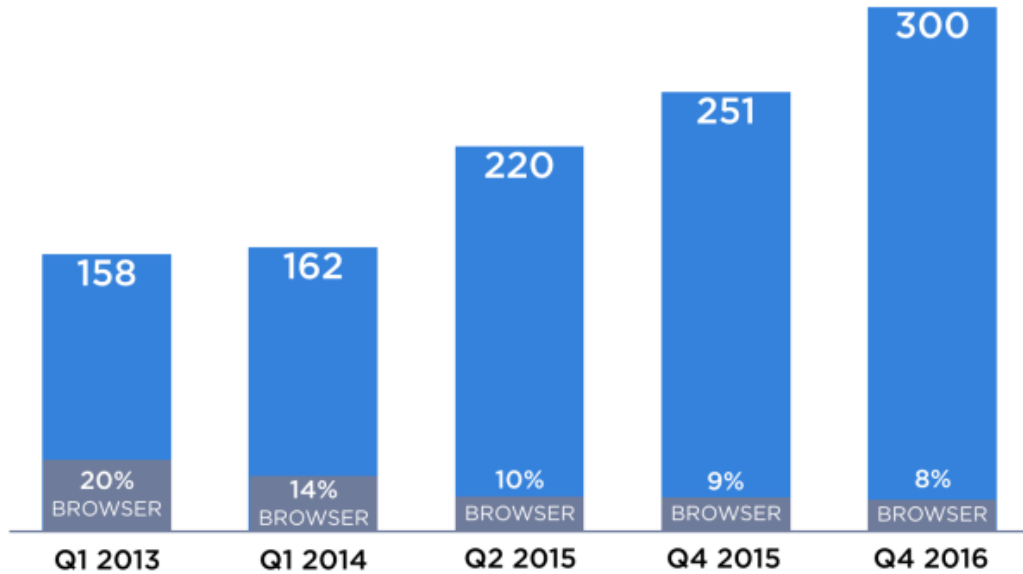
DRIVING NORTH AMERICA GROWTH

TIME!

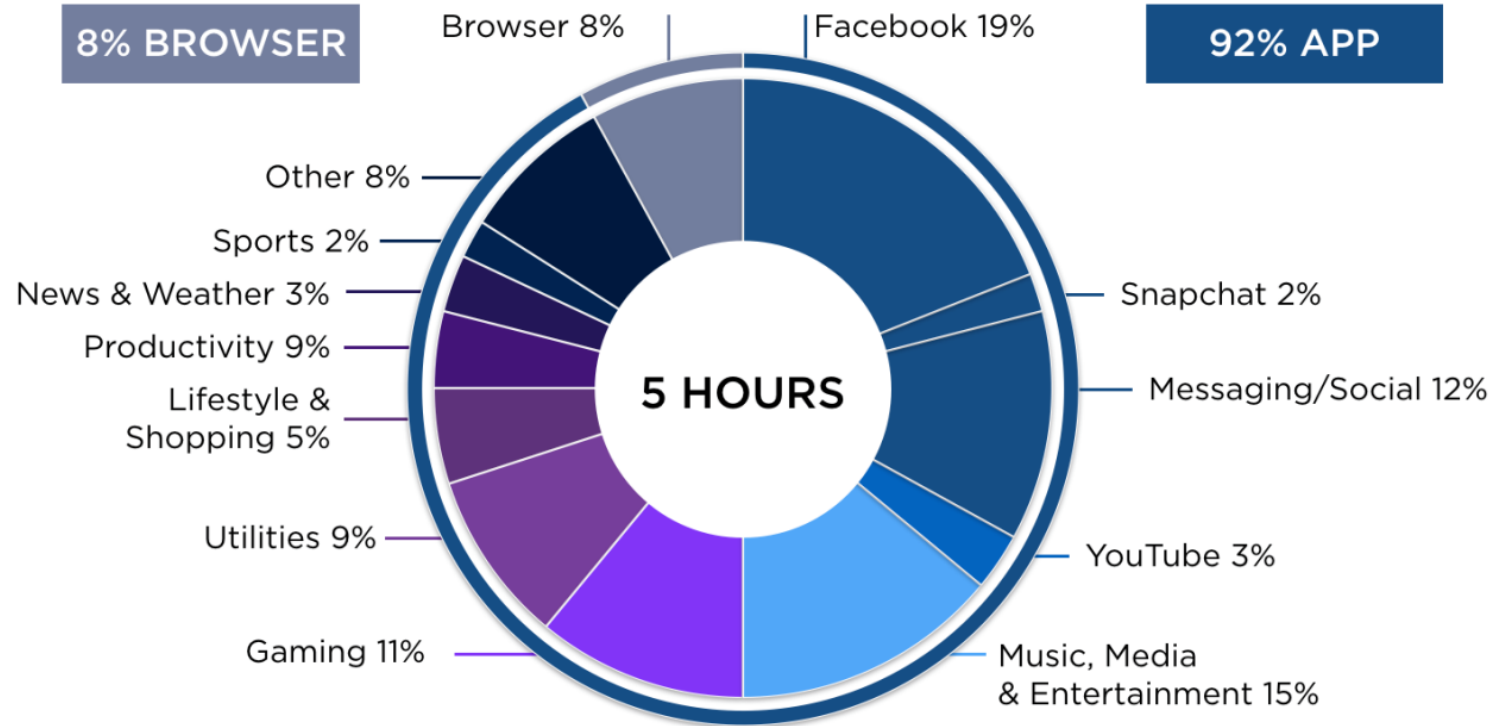
QUIZ

**HOW MUCH
TIME IS SPENT ON
MOBILE EACH DAY?**

US Daily Mobile Time Spent

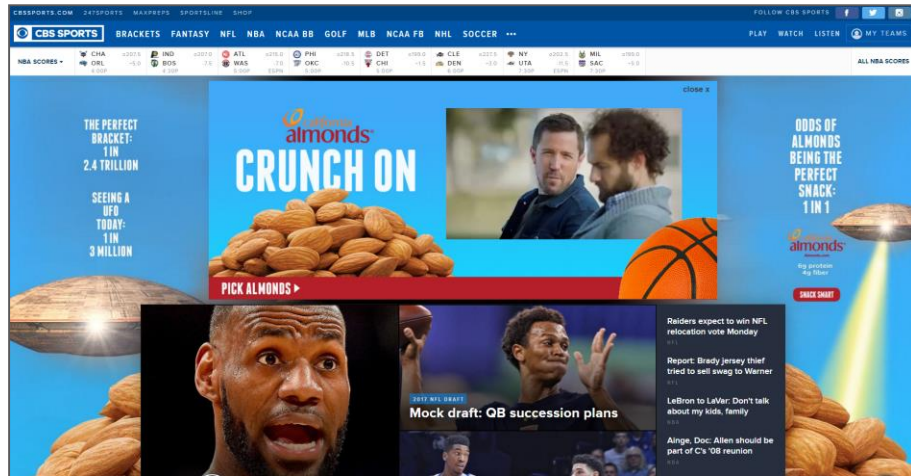
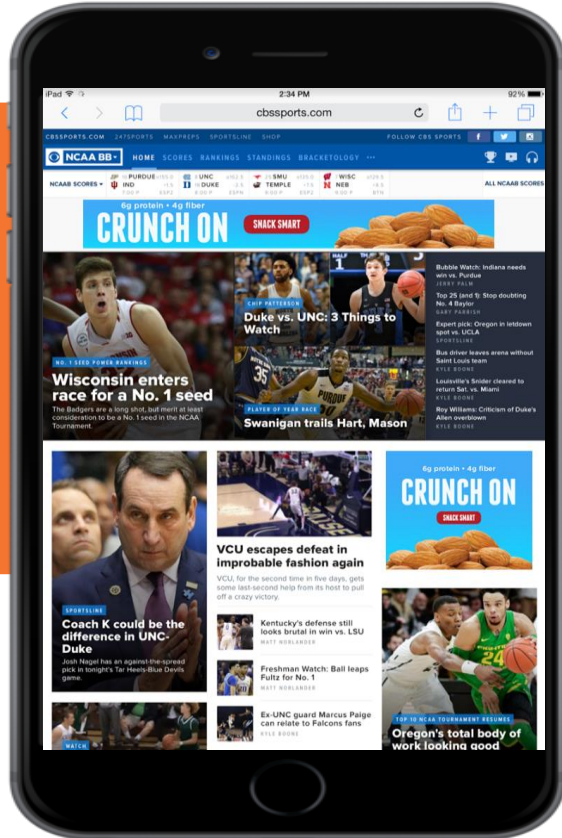


US Time Spent By App Category



MAXIMIZE OUR APPROACH

APPEALING, CONTEXTUALLY RELEVANT CONTENT

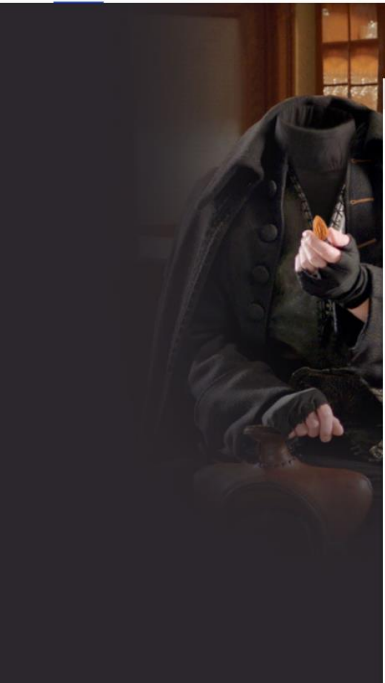








THU 8:25 PM ET	SUN 9:30 AM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 1:00 PM ET	SUN 4:05 PM ET	SUN 4:25 PM ET	SUN 6:30 PM ET	MON 8:30 PM ET



START 'EM SIT 'EM

PRESENTED BY

[PREVIOUS](#)
[NEXT](#)

Published: Oct. 25, 2017 at 10:06 a.m. Updated: Oct. 25, 2017 at 10:57 a.m.

Start 'Em, Sit 'Em Week 8: Defenses

Michael Fabiano
Senior fantasy analyst
[+ Follow on Twitter](#)

"I recommend a helmet."
-THE HEADLESS HORSEMAN

"If they won't trade with you, haunt them."
-THE HEADLESS HORSEMAN

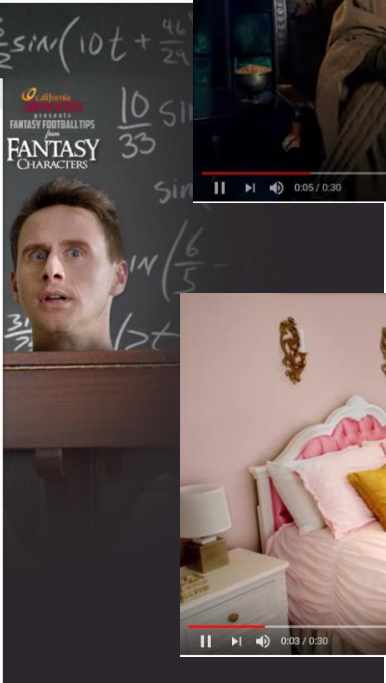
Video will begin in 10 seconds

Start 'Em & Sit 'Em is the ultimate weekly look at NFL matchups and how they'll affect your fantasy football team. Fantasy superstars such as Le'Veon Bell and Antonio Brown will not be featured. NFL researcher Careen Falcone and former #2 FF World Player Rank and NFFC Platinum and Ultimate Champion Derek Pierson have contributed to the column. For your final lineup decisions, check our [lineup rankings](#).

Defense

Byes: Arizona, Green Bay, Jacksonville, Los Angeles Rams, New York Giants, Tennessee

START 'EM

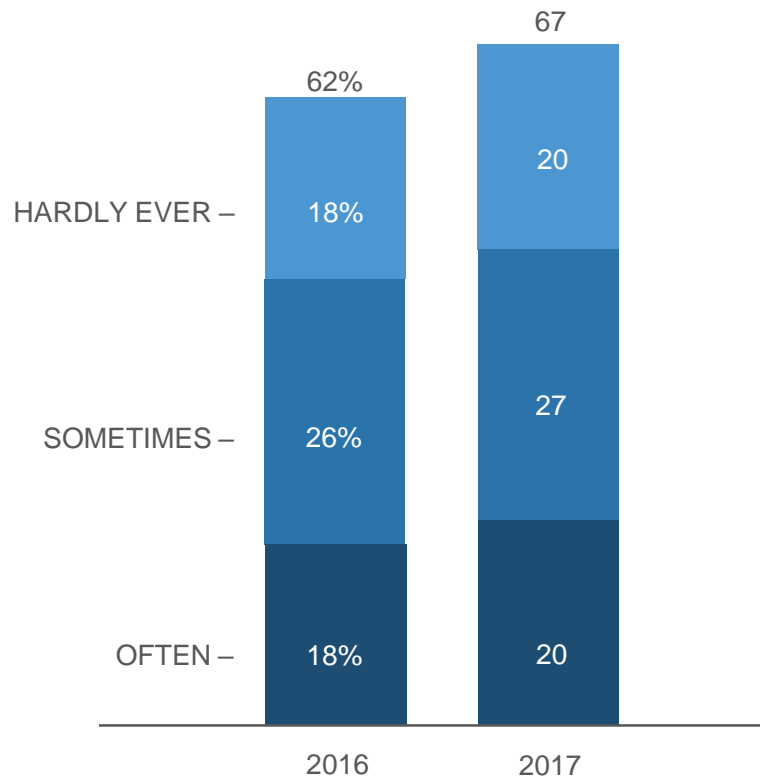


The logo features a stylized almond icon on the left, composed of two overlapping, curved shapes in shades of orange and yellow. To the right of the icon, the word "california" is written in a lowercase, orange, sans-serif font. Below "california", the word "almonds" is written in a larger, bold, lowercase, red, sans-serif font. A registered trademark symbol (®) is located at the top right of the word "almonds".

california
almonds®

TWO-THIRDS OF U.S. ADULTS GET NEWS FROM SOCIAL MEDIA

% of U.S. adults who get news from social media sites...



Source: Survey conducted Aug. 8-21, 2017.

"News Use Across Social Media Platforms 2017", Pew Research Center



**CELEBRATE
ALMOND DAY
THE ENTIRE MONTH
OF FEBRUARY
WITH HEART-SMART
SNACKS FROM
MARISA MOORE, RDN**



WE ENCOURAGED CONSUMERS TO “CARPE PM”.

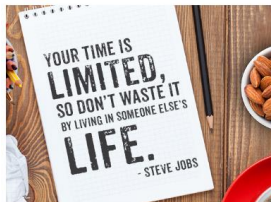
83% OF BUSINESS PEOPLE SUGGEST THAT
**THEY ARE LESS PRODUCTIVE
IN THE AFTERNOON.
MANY OF THEM
HAVEN'T HAD A SNACK!**

GENIUS

Workplace Snacks are Necessary to Keep

Productive

53% of business people suggest that they are less productive in the afternoon. Well it's no surprise many of them haven't had a snack!



CRASH COACH

Be Yourself

Your time is limited, so don't waste it living someone else's life. -Steve Jobs



CRASH COACH

Keep Your Energy Up with Post-Lunch Walks

Post-lunch walks are so important to keep your energy up. 15 – 20 minutes is all it takes to increase digestion, brain activity and amp you up for the second half of the day.



INSPIRATION

Drink up Jen's Green Detox Smoothie

Green Detox Smoothie Description Recipe created by celebrity trainer Jen Widerstrom and featured in her book "Diet Right for Your Personality Type" Quick and easy to make, this smoothie made with spinach, beets, almond milk and cucumber is ideal as a refreshing detox. Prepare in advance...



CRASH COACH

Seize the Day

#MondayMotivation. Choose one thing each day to improve on from the day before. It could include packing a healthy lunch, going to the gym or getting to bed early. Moments become minutes and minutes become days, ultimately leading to a greater year based on simple improvements.



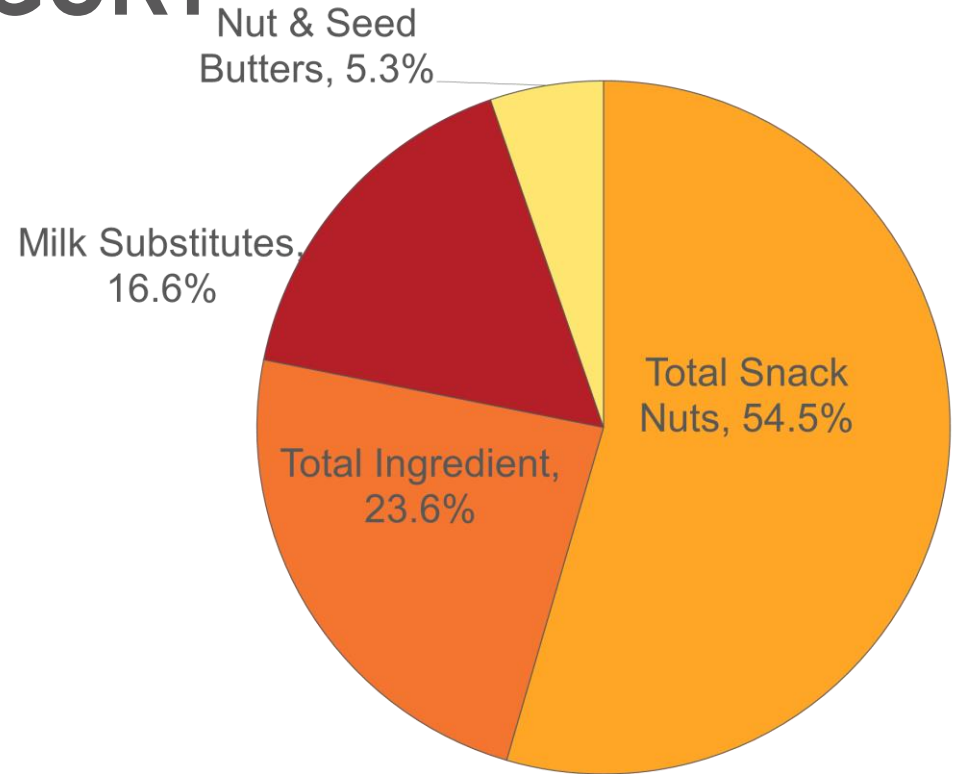
CRASH COACH

The Afternoon Crash is Real!

The afternoon crash is real! Snack on a handful of almonds to fight the slump. Their combination of protein, fiber and quality fat will lead to better eating decisions and will help maintain your productivity all day long.



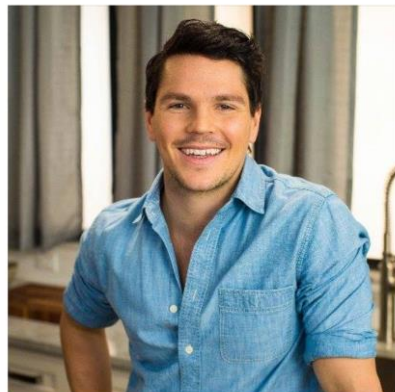
ALMOND MILK IS OUR SECOND LARGEST CATEGORY





California Almonds
November 22 at 5:19pm · 🌐

Chef Dan Churchill, of Genius Kitchen and ABC's Good Morning America, is cooking up something new with almond milk! Stay tuned as he shares his best almond milk recipes – based on your votes! From savory to sweet, you'll discover #AllthePlacesAlmondMilkCanGo. Follow Daniel Churchill for some inspiration



Like Comment Share



We've partnered with Jackie Newgent, Registered Dietitian Nutritionist, to bring you a brand new almond milk recipe to enjoy. Here's Jackie's take on hummus:

Almond Lover's Hummus
Makes 8 servings, 1/4 cup each

INGREDIENTS

- 2/3 cup plain unsweetened almond milk
- 1 (15-ounce) can no-salt-added chickpeas, drained
- 1/2 cup unsalted, creamy almond butter

California Almonds shared Nourish by Tastemade's video.
November 9 at 10:40am · 🌐

A great way to use versatile almond milk! #alltheplacesalmondmilkcango

ALMOND MILK
1 CUP



Tastemade

-0:36 ⚙️ 📺 🔊

An aerial photograph of a dense urban skyline, likely in a major Chinese city, featuring numerous high-rise buildings and skyscrapers. A large, semi-transparent white rectangular overlay is centered over the image, containing the text 'IGNITING DEMAND IN CHINA' in a bold, dark red, sans-serif font. The text is arranged in three lines, with 'IGNITING' on the top line, 'DEMAND' on the middle line, and 'IN CHINA' on the bottom line. The background shows a mix of modern glass skyscrapers and older, more densely packed buildings, with a highway visible in the lower-left corner.

**IGNITING
DEMAND
IN CHINA**

CHINA ATTITUDES AND USAGE SHOWED DRAMATIC INCREASES IN THE LAST YEAR

Total Sample	Almonds 2016 (n=2,000)	Almonds 2014 (n=2,000)	Gap ('16 vs. '14)
Awareness			
Nuts Top-of-Mind Awareness (First Mention)	8%	4%	+4pts
Nuts Total Awareness (Any Mention)	23%	16%	+7pts
Positive Story, Almonds – % of those recalling story	45%	43%	+2pts
Association with Snacking	28%	18%	+10pts
Association with Bakery	17%	11%	+6pts
Association with Chocolate	16%	8%	+8pts
Consumption			
Avg consumption frequency (total, avg. times/month)	5.6x	5.2x	+0.4x
Avg consumption frequency (as a snack, avg. times/month)	4.9x	4.7x	+0.2x
Nut Eaten Most Often as a Snack (% selecting)	26%	17%	+9pts
Nut Eaten Most Often in Other Foods (% selecting)	21%	15%	+6pts
Attitudes			
Almond Liking (top-2 box, 9/10 on 10pt scale)	51%	45%	+6pts
Almond Healthfulness (top-2 box, 9/10 on 10pt scale)	52%	48%	+4pts
Almond Delivery on... (% excellent/good, top-3)			
Is a healthy food	84%	77%	+7pts
Great for sharing	82%	66%	+16pts
Tastes great	82%	66%	+16pts
Almonds as the nut best described by... (top-3)			
Best tasting nut	24%	16%	+8pts
Good for giving as a gift	23%	n/a	-
My favorite nut (Know the origin / High in vitamin E)	22% (tie)	15%	+7pts



what could California Badanmu stand for that has relevance to our consumers?



TARGET AUDIENCE
RESONATES WITH
BEAUTY BENEFIT

BEAUTY MEANS CONFIDENCE

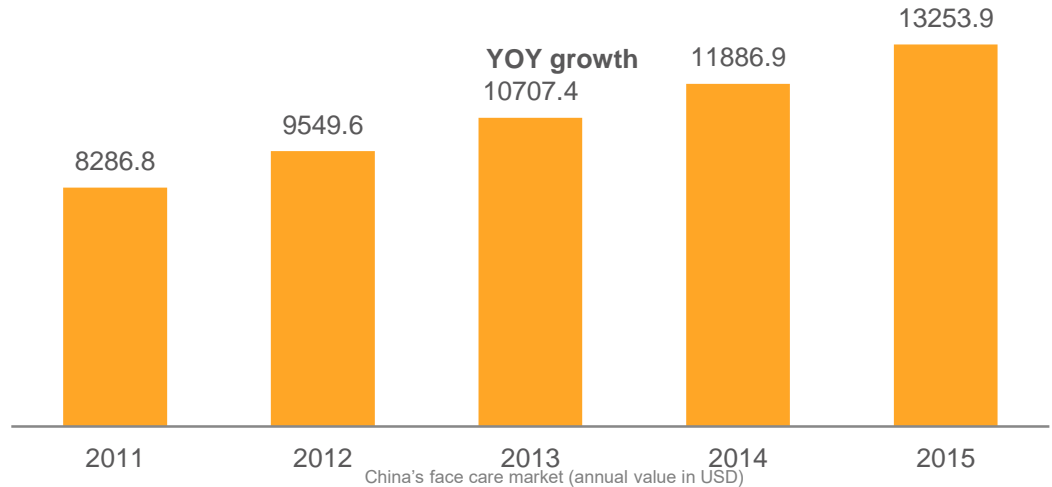


agrees beautiful
look is useful as it
makes me feel
confident, attractive,
and young.





WHILE THEY SPEND MORE AND MORE MONEY ON KEEPING THEM BEAUTIFUL FROM THE OUTSIDE

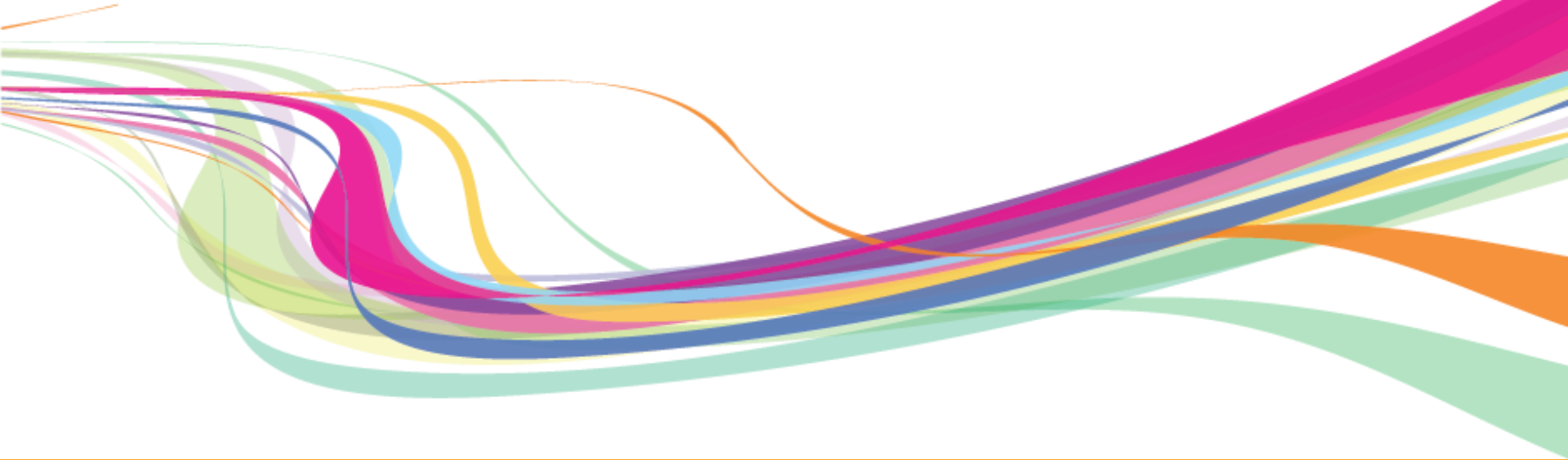


A close-up photograph of a young woman with dark hair, smiling warmly. She is holding a silver fork with a small pile of fresh green leafy vegetables on it. The background is softly blurred, suggesting an indoor setting with natural light. The image is framed by a white border.

“YOU ARE WHAT YOU EAT”

67%

AGREE THAT BEAUTY IS ASSOCIATED WITH WHAT YOU **EAT**,
HOW MUCH EXERCISE, AND LIFE BALANCE



GOING FORWARD

We want to make it more explicit when linking California Almonds to skin beauty benefits

A hand holding a sun hat against a bright, sunny background. The background is a soft, out-of-focus scene of a sunny day with a hand holding a sun hat.

California badanmu is
**your daily dose
of sunshine.**

California badanmu is great for your skin.

And because it's great for your skin, you should have them every day.



FOLLOW THE SUNSHINE







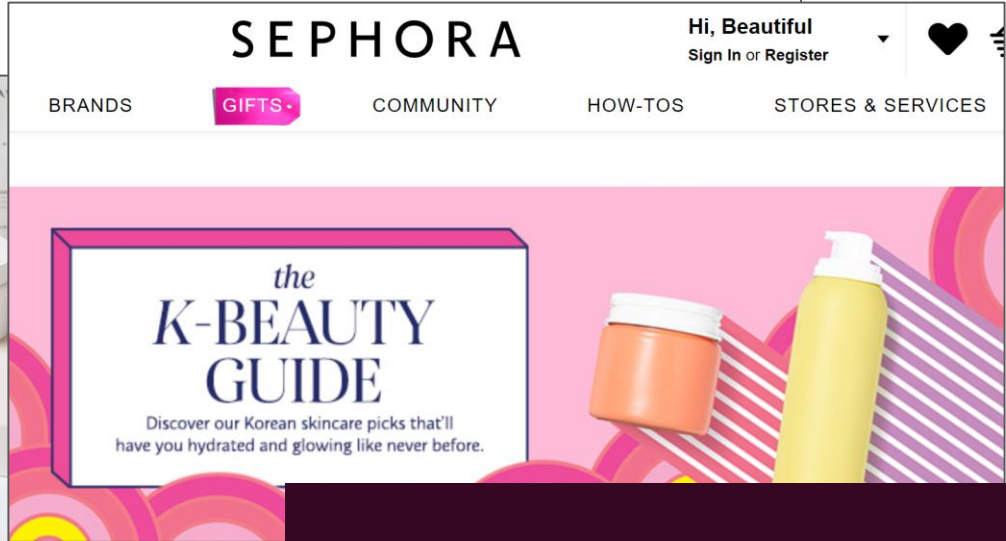
**SOUTH KOREA
LEADING BEAUTY**

I VISITED SEOUL FOR TOTAL KOREAN BEAUTY IMMERSION



Best of K-Beauty 2017

See this year's winners



Why Is Everyone Obsessed With Korean Beauty Products?

K♥BEAUTY
Europe



Modern and trendy female consumers

KOREAN CONSUMERS

Independent and open-minded, willing to try new experiences

Sensitive to trends with emphasis on visuals

Highly interested in beauty and weight management as a way of self-management and willing to invest in premium goods

Digital-savvy by getting information and actively communicate via social media



OUR CHALLENGE IN SOUTH KOREA

WITH POPULARITY SOARING, THE COMPETITION
IN THE MIXED NUTS IS GETTING FIERCE



ALMONDS, MY BEAUTY SECRET

Reaching Consumers with Multiple Touchpoints

Branded Content Video
 Beauty Reality Show TV PPL
 Health Documentary TV PPL



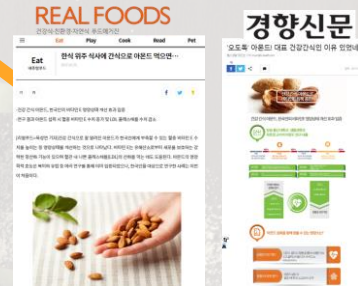
Spokesperson
 Digital/Influencers
 Photography



Health professional outreach
 Consumer events
 Media event



Media outreach
 Magazine Advertising
 Digital Advertising
 Advertorials
 E-newsletter



A hand holding a glowing lightbulb against a sunset background. The lightbulb is the central focus, with its filament visible and a warm glow emanating from it. The background is a soft gradient of orange and pink, suggesting a sunset or sunrise. The hand is positioned in the lower right, with fingers gently gripping the base of the bulb. The overall mood is one of inspiration and innovation.

**EUROPE
FROM INGREDIENT
TO SNACK
TO INNOVATION**



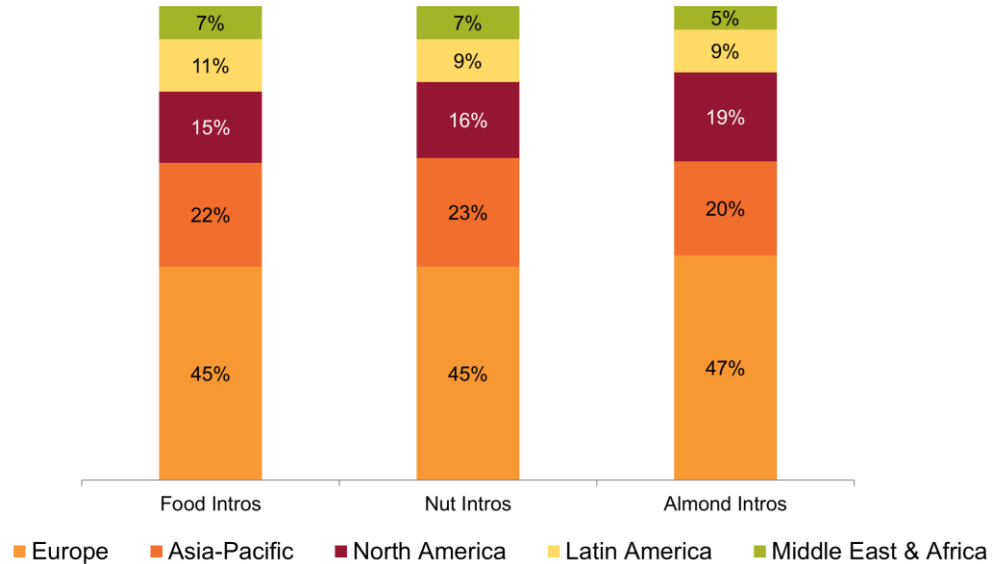
**ALMONDS HAVE A STRONG
INGREDIENT HERITAGE IN
EUROPE**



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

EUROPE DRIVES THE LARGEST SHARE OF INTRODUCTIONS ACROSS THE GLOBE

2016 Global Food, Nut, and Almond Introductions
Regional Share





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

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

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



Bakery = 52%



Snacks = 37%



Confectionery = 61%



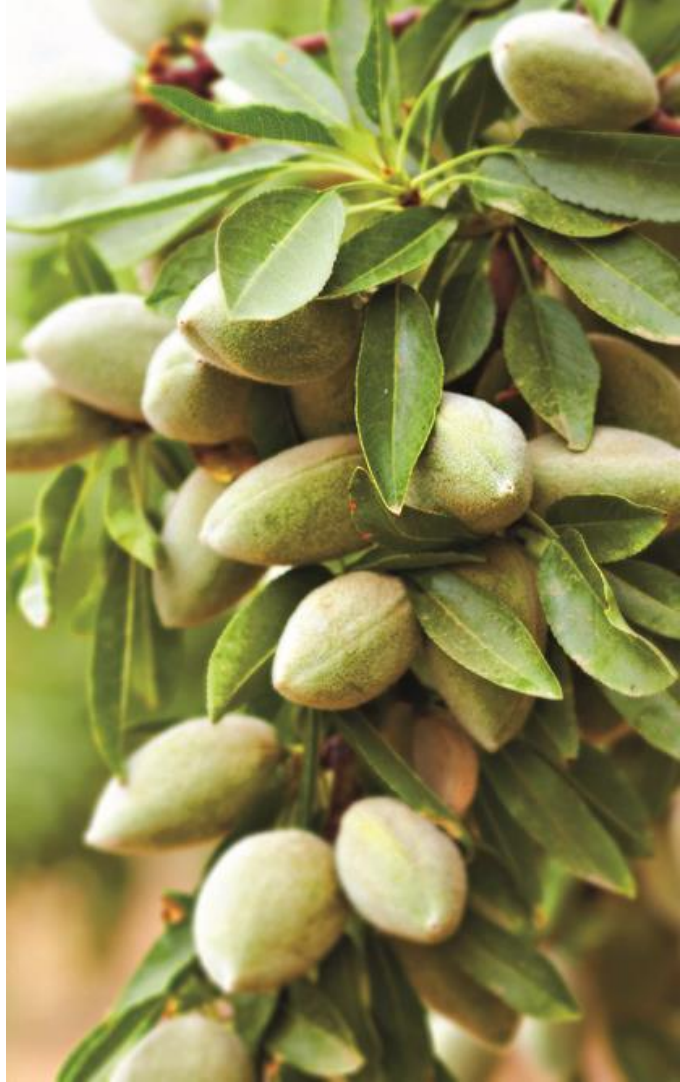
Cereal = 42%



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

TOP 3 OPPORTUNITIES IN UK

1. Differentiate almonds in health through weight management, portion control and usage ideas
2. Communicate on key motivational area-tide me over!
3. Tell our sustainability story even more proactively



ALMONDS ARE HOT IN FRANCE

A large white arrow pointing upwards, set against a background of a fire with a woodpecker pecking at a log.

Top-of-Mind Awareness

Consumer Perceptions

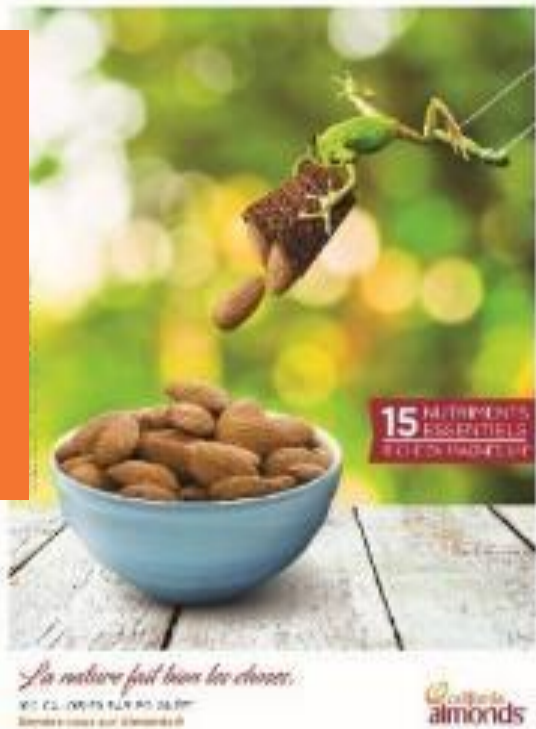
Snacking Association

#1

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



In 2017, ABC launched a refreshed integrated marketing campaign in France.



Purchase Power

She is the main shopper at home for herself or her family



Social at Home

She likes spending time with friends and family



Self-Care

She consciously pay attention to a healthy and balanced nutrition



Routine Snackers

Regularly creates snacking occasions between meals



Culinary-Involved

She always enjoy cooking new dishes, likes to try new products, and invests in quality brands



Health-Empowered

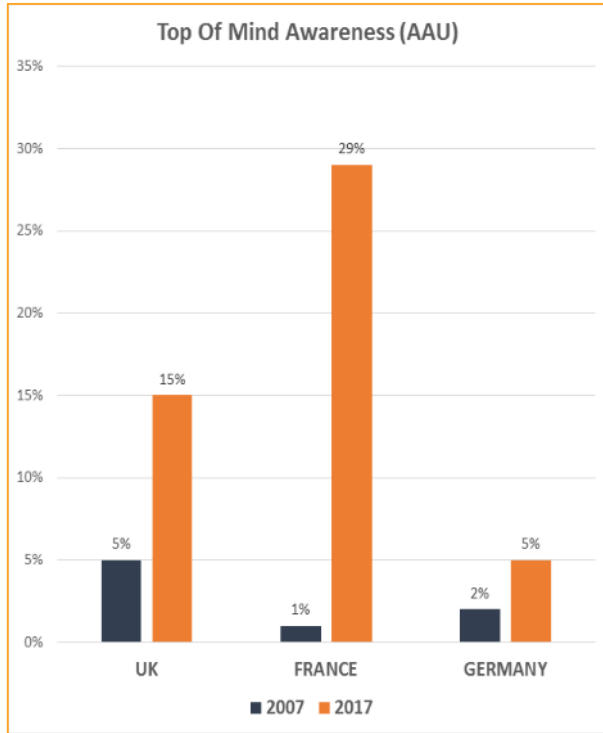
She often learns about health issues in the media



GERMANY GROWTH OPPORTUNITY



RESULT OF THE LONG-TERM SNACKING STRATEGY



ABC, AAU, 2017

Market	FY15/16 Almond Snack Volume (change vs YAG)	Almond Snack Volume 4yr CAGR	Almond Snack Value 4yr CAGR
UK	12.5%	13.3%	19.7%
France	10.5%	11.4%	21.3%
Germany	-6.8%	-2.4%	14.6%

IRI Sales Data, 15/16 Crop Year

TOP 3 OPPORTUNITIES IN GERMANY

1. Invest to raise awareness
2. Focus communications on the mid-day snacking occasion and the balance of “rich & light”
3. Engage the trade to drive new products



First fully integrated program in Germany to capitalize on snacking

Campaign elements include...

:15 TV Spots

Print Ads

Social Media Ads

Native Digital Ads

Mobile Ads

YouTube Video Ads

Custom Content Partnerships

In-Store Point-Of-Sale TV Spots

Custom Landing Page on Almonds.de

Supported by robust Public Relations activities

Target Audience: The “DE-lightful Snacker”



Income

Above average household income (€48K)



Always On

Connected daily, for social, downloads, reads, ideas

Living with Kids

65% have kids at home, so pantry list is a family mix; two generations living in the household



Routine Snackers

Regularly creates snacking occasions between meals



Food is Aspirational

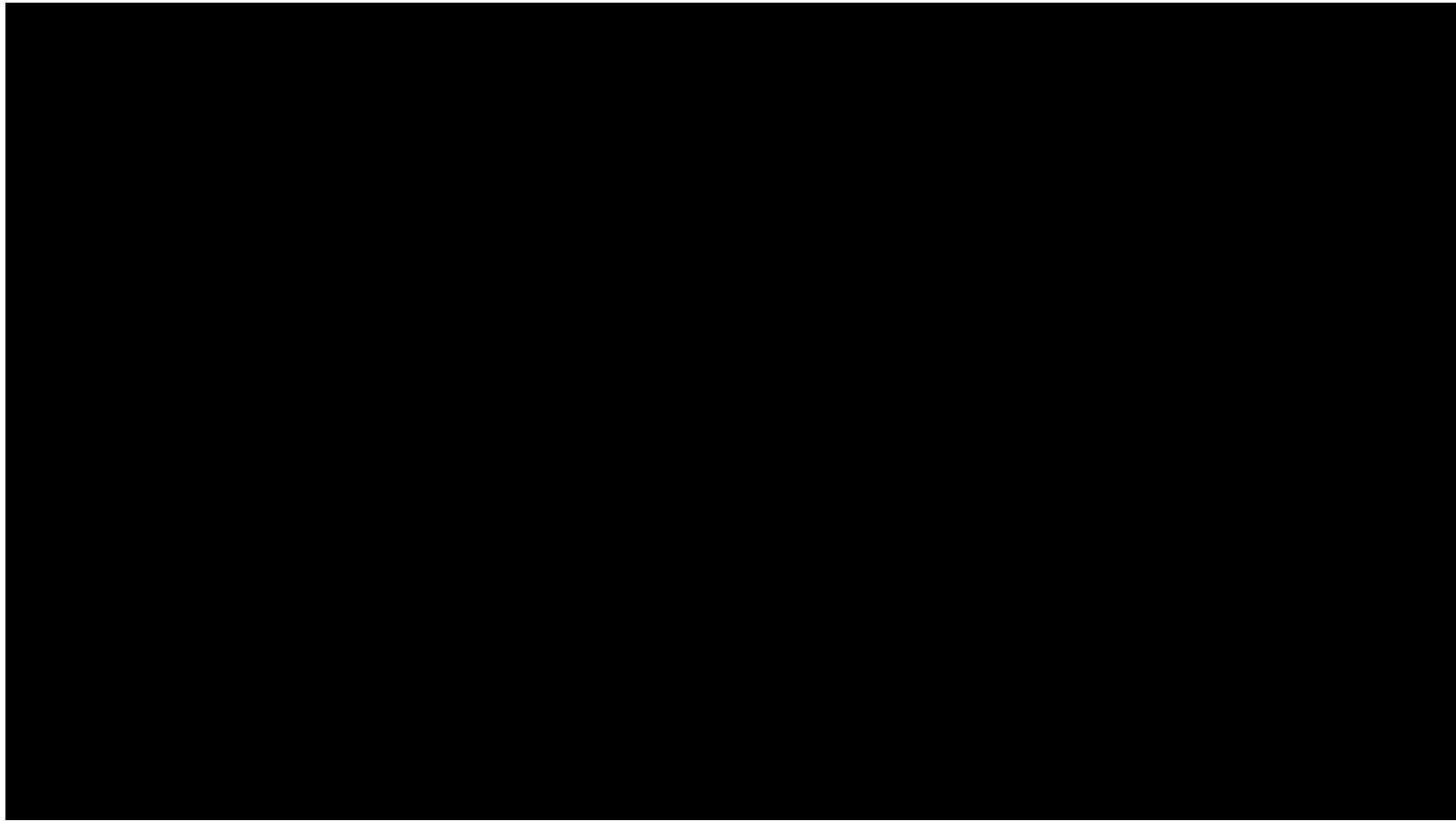
Good food makes life worth living, and it should be exciting, tasty, and convenient



Reduced Calorie Focus

Primarily to maintain weight and diet, but tension lives between good food and health goals







INDIA: CELEBRATING TRADITIONS



**Small investments today,
build into the big successes
of tomorrow.**

**Almonds are a small investment
into my and my family's future.**



A photograph of two women in a warm, festive indoor setting. The woman on the left, wearing a blue sleeveless top, is holding a large, wrapped gift in gold paper with a white bow. The woman on the right, wearing a pink and gold sari, is smiling and has her arm around the first woman's shoulder. She is also holding a wrapped gift. The background features a window with a grid pattern, through which bright light is streaming, and a string of warm-toned lights is visible on the left. The overall atmosphere is joyful and celebratory.

Diwali Gifting: a Big Opportunity

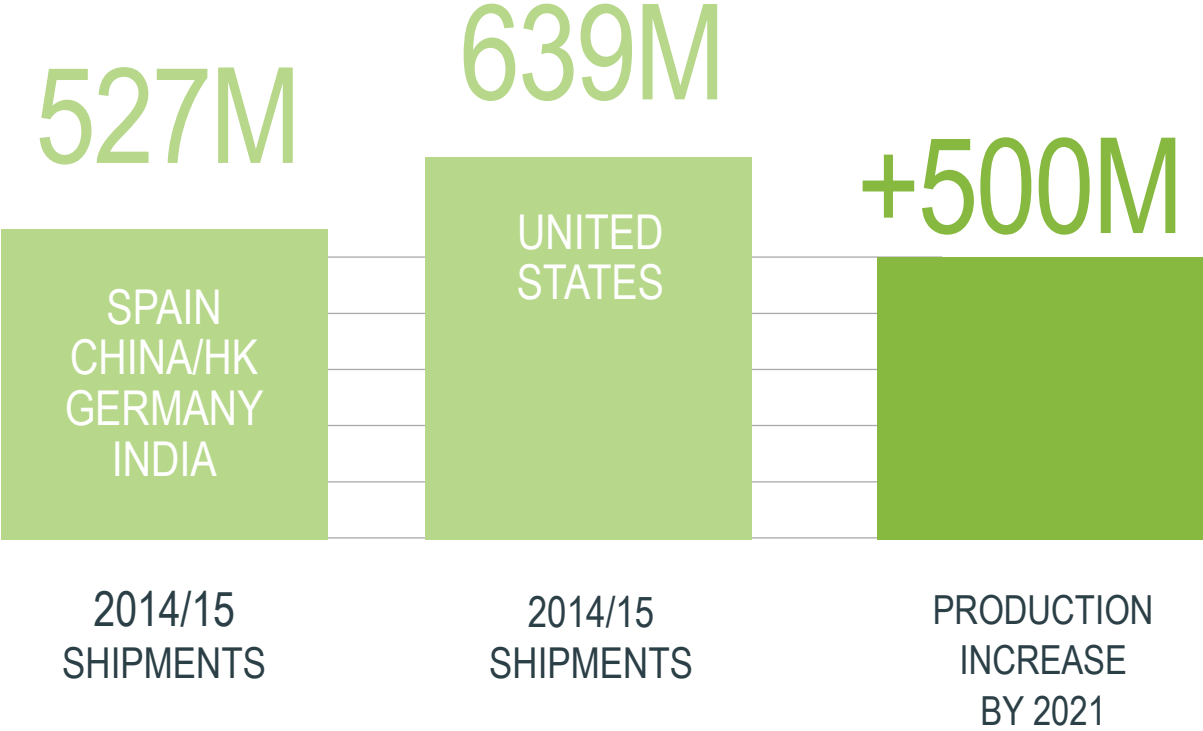


**Diwali Gifting
Commercial
My Aunt, My Bestie**



EXPANSION MARKETS

A NEW THRESHOLD OF GROWTH



A hand holding a globe with a sunset background and a field of international flags. The globe is held in the center, with a bright sun setting behind it, creating a lens flare effect. The background is a gradient of orange and yellow, transitioning to a dark blue at the bottom. Numerous small, colorful flags of various countries are scattered across the entire image, creating a global theme. The text "172 MARKETS WERE ANALYZED" is prominently displayed in a white, bold, sans-serif font, enclosed in a thin orange border, centered horizontally across the middle of the image.

172 MARKETS WERE ANALYZED



MARKETS WERE ANALYZED

1. Market size
2. Addressable population
3. Trade and Regulatory
4. Economic and Political indicators
5. Current almond shipments
6. Current or Past almond investment
7. Input from stakeholders

MARKETS WERE SELECTED FOR FURTHER ANALYSIS

- Brazil
- Saudi Arabia
- Spain
- Italy
- Turkey
- Columbia
- Mexico
- Indonesia
- Australia
- South Africa
- Thailand
- Malaysia
- Philippines
- Iran
- Egypt
- Chile
- Argentina





SELECTING MARKETS FOR ANALYSIS

OPPORTUNITY ASSESSMENTS

Based on this analysis, the following markets were selected for additional consideration:



Saudi Arabia



Brazil



Southern Cone
of South America



Mexico



Italy



Indonesia



OBJECTIVES:

1. Determine growth markets to match future supply
2. Build market knowledge of each country
3. Better understand consumers' lifestyles and food choices
4. Assess opportunities and change forces related to food, health and almonds
5. Identify considerations for consumer targeting and messaging
6. Explore situations, needs, and opportunities to inform future programs

Market
Attractiveness
Assessment

Expert Interviews
& Secondary
Research

In Market: Primary
Consumer &
Trade Research

**3 KEY STEPS FOR MARKET
OPPORTUNITY ASSESSMENT**

DRIVING EXPANSION INTO NEW MARKETS AND OPPORTUNITIES



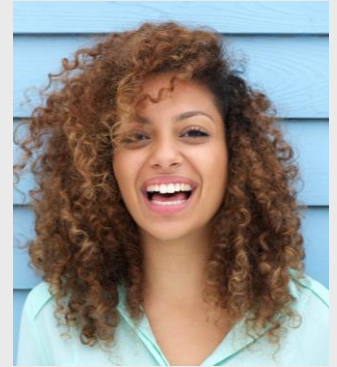
2018 Launch



2018 Launch



2018 Launch



Further research underway

JAPAN OPPORTUNITIES

- One of the **healthiest populations in the world**
- **Strong nut snacking culture**
- Shifting from salted nuts to **unsalted nut snacks**
- **Strong affinity for almonds in snacking and chocolate-covered product**
- **Belief that almonds are healthy**, but lack knowledge of specific health benefits

JAPAN INSIGHTS

Shift from Salted to Unsalted Nuts



Includes seven portion-size packs; sold at drug stores

“Ten years ago, everything was salted, but now our best seller is the roasted unsalted almonds.”
- Kyoritsu Foods

Strong Almond + Chocolate Heritage



“Almonds are the perfect balance with chocolate.”

MEXICO OPPORTUNITIES

- At least 20% of the population has strong potential for increased almond consumption
- Strong push for **healthier lifestyles**: extremely high rates of diabetes and obesity in world
- Extensive **government initiatives** (including taxes) in place to promote healthy eating
- **Strong snacking culture**, nut snacking is strong with 38% always or often snacking on nuts
- **Almond milk** awareness and penetration is high
- Trade favorable with NAFTA

MEXICO INSIGHTS

Government Health Initiatives



“Everyone knows about the sugar tax. I stopped drinking so much soda and switched to water.”

Healthy Snacking on the Rise



“When I’m out and about and become hungry I eat anything that’s in sight, it’s a big vice for me. I’m trying to start to bring healthy snacks with me.”



ITALY OPPORTUNITIES

- Consumers shifting to **healthier lifestyles** and open to trying new, healthy foods
- **Awareness of healthy snacking is growing** and appears to be on the tipping point
- **Strong heritage and affinity for almonds**, almonds are believed to be healthy
- **Almond product is highly developed at retail** – available in convenient packs and flavored
- Consumers and trade are **open to California product**
- With ABC already in the EU market, there are **efficiencies and general EU stability**

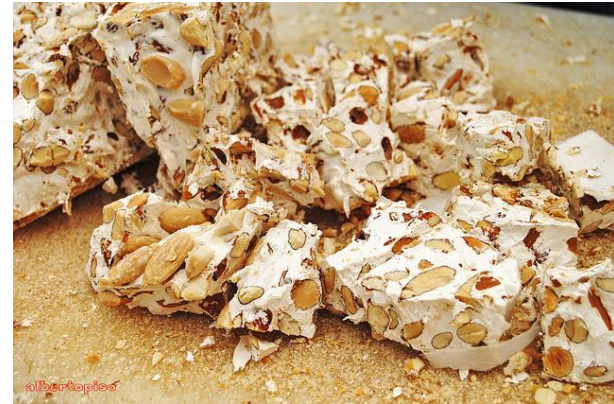
ITALY INSIGHTS

Healthy Snacking Taking Hold



“Old people speak in negative terms of snacks, but there are discussions around snacks being important for energy, the body needs snacks – it is a lie that snacking is not good.”

Strong Almond Affinity



“Almonds provide energy and they have a wonderful taste! Plus, they can be found everywhere.”

SOUTH AMERICA OPPORTUNITIES

- Brazil: Large market with **50% middle class or above**
- Health and wellness foods on the rise
- **Strong snacking behavior** of savory products
- Strong usage of **cereal bars and other nuts**
- Consumers are **motivated by the health benefits of almonds**
- Opportunity to **grow ingredient use**
- Chilean **trade prefers California Almonds** for manufactured products due to stable supply and more varieties
- **Chilean almond production** not expected to increase

SOUTH AMERICA INSIGHTS

Changing Food Philosophy



“I try to vary the proteins I eat now. I used to almost exclusively eat beef, now I try chicken, fish, and on Wednesdays I don’t eat meat at all.”

Nuts Growing as a Snack



“If I nibble on nuts instead of potato chips, I feel better, so I am trying to snack on nuts more often.”

A landscape photograph showing rolling hills. In the foreground, a dirt road curves through a field of green, low-lying vegetation. The hills in the background are covered in golden-brown grass, suggesting a dry or late summer season. The sky is a pale, hazy blue. The entire image is enclosed within a white rectangular border.

**HOW THE INDUSTRY
CAN TAKE ADVANTAGE**

Thank you!



What's Next

Tuesday, December 5 at 1:45 p.m.

- Repositioning Plant-Based Protein – Room 306-307
- Common Errors in Orchard Set Up– Room 308-309
- The Science and Practice of Intentional Recharge in Almond Orchards – Room 312-313
- Produce Safety Rule for Farms: How to Comply and What About the Grower Exemption? – Room 314

CEUs – New Process

Certified Crop Advisor (CCA)

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

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

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

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



State of the Industry

Tuesday at 4:30 p.m. in Hall C