CEUs – New Process

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• Sign in and out of each session you attend.
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• 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.
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 a 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

• 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
- Sales data
  - Changes vs. prior year
- Trended over time
  - 5 and 10 years
  - Percent shipments
  - Shipments vs. spending
BUT...

THE WORLD IS CHANGING
10.9 Billion People by 2050
CHANGES IN THE CLIMATE AND CASCADING ENVIRONMENTAL EMERGENCIES
New demands for…
trust and transparency
food safety
food quality
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.

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

Posted Nov 11, 2017 by Jon Russell (@jonrussell)

Google and Walmart Partner With Eye on Amazon

By DAIJUKI WAKABAYASHI and MICHAEL CORKERY  AUG. 23, 2017

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.
NEW TASTE IMPERATIVES
AMPLIFYING FOOD EXPERIENCES
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
MARKET PRIORITIZATION
NORTH AMERICA
Canada
U.S.

EUROPE
UK, France, Germany

ASIA
China, India, S. Korea
EVALUATING MARKET OPPORTUNITIES

- **Size and Growth**
- **Environment and Preference**
- **Ability to Impact**
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

Alternates:

Jeff Smith  
Blue Diamond Growers

Alexi Rodriguez  
Campos Brothers Farms

Bill Morecraft  
Blue Diamond Growers

Brian Ezell  
Wonderful Pistachios and Almonds

Suzanne Hagener  
Blue Diamond Growers

Matt Mariani  
Mariani Nut Company

Bobby MCCuan  
Blue Diamond Growers

Maya Erwin  
Blue Diamond Growers

Warren Cohen  
Blue Diamond Growers

Caleb Gervase  
Van Duyn Farms, Inc.

Sim Batth
DRIVING NORTH AMERICA GROWTH
HOW MUCH TIME IS SPENT ON MOBILE EACH DAY?
US Daily Mobile Time Spent

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1</td>
<td>158</td>
<td>162</td>
<td>220</td>
<td>251</td>
<td>300</td>
</tr>
<tr>
<td>BROWSER</td>
<td>20%</td>
<td>14%</td>
<td>10%</td>
<td>9%</td>
<td>8%</td>
</tr>
</tbody>
</table>

US Time Spent By App Category

- Facebook 19%
- Music, Media & Entertainment 15%
- Other 8%
- Productivity 9%
- Messaging/Social 12%
- News & Weather 3%
- YouTube 3%
- Lifestyle & Shopping 5%
- Gaming 11%
- Utilities 9%
- Snapchat 2%
- Sports 2%
- Browser 8%

Total time spent: 5 HOURS

92% APP
MAXIMIZE OUR APPROACH APPEALING, CONTEXTUALLY RELEVANT CONTENT
TWO-THIRDS OF U.S. ADULTS GET NEWS FROM SOCIAL MEDIA

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

CELEBRATE ALMOND DAY THE ENTIRE MONTH OF FEBRUARY WITH HEART-SMART SNACKS FROM MARISA MOORE, RDN
WE ENCOURAGED CONSUMERS TO “CARPE PM”.

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, boost activity and amp you up for the second half of the day.

CRASH COACH
The Afternoon Crash is Real!
The afternoon crash is real. Snack on a handful of almonds to fight the drowsy. Their combination of protein, fiber and healthy fats will lead to better eating decisions and will help maintain your productivity all day long.

INSPRIATION
Drink up Joni’s Great Detox Smoothie
Green Detox Smoothie Description: Recipe created by celebrity trainer, Joni Widergarden and featured in her book “Eat Right for Your Personality Type”-跟：
Quick and easy to make, this smoothie made with spinach, beets, almond milk and cucumber is ideal as a refreshing drink. Prepare in advance...

CRASH COACH
Seize the Day
Monday Motivation: Choose one thing each day to improve on or from the day before. It could include packing a healthy lunch, going to the gym or getting to bed early. Moments become routines and routines become days, ultimately leading to a greater year based on simple improvements.

SEIZE THE DAY
ALMOND MILK IS OUR SECOND LARGEST CATEGORY

- Milk Substitutes, 16.6%
- Total Ingredient, 23.6%
- Total Snack Nuts, 54.5%
- Nut & Seed Butters, 5.3%
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
IGNITING DEMAND IN CHINA
CHINA ATTITUDES AND USAGE SHOWED DRAMATIC INCREASES IN THE LAST YEAR

<table>
<thead>
<tr>
<th></th>
<th>Total Sample</th>
<th>Almonds 2016 (n=2,000)</th>
<th>Almonds 2014 (n=2,000)</th>
<th>Gap (’16 vs. ’14)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Awareness</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nuts Top-of-Mind Awareness (First Mention)</td>
<td>8%</td>
<td>4%</td>
<td>+4pts</td>
<td></td>
</tr>
<tr>
<td>Nuts Total Awareness (Any Mention)</td>
<td>23%</td>
<td>16%</td>
<td>+7pts</td>
<td></td>
</tr>
<tr>
<td>Positive Story, Almonds – % of those recalling story</td>
<td>45%</td>
<td>43%</td>
<td>+2pts</td>
<td></td>
</tr>
<tr>
<td>Association with Snacking</td>
<td>28%</td>
<td>18%</td>
<td>+10pts</td>
<td></td>
</tr>
<tr>
<td>Association with Bakery</td>
<td>17%</td>
<td>11%</td>
<td>+6pts</td>
<td></td>
</tr>
<tr>
<td>Association with Chocolate</td>
<td>16%</td>
<td>8%</td>
<td>+8pts</td>
<td></td>
</tr>
<tr>
<td><strong>Consumption</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avg consumption frequency (total, avg. times/month)</td>
<td>5.6x</td>
<td>5.2x</td>
<td>+0.4x</td>
<td></td>
</tr>
<tr>
<td>Avg consumption frequency (as a snack, avg. times/month)</td>
<td>4.9x</td>
<td>4.7x</td>
<td>+0.2x</td>
<td></td>
</tr>
<tr>
<td>Nut Eaten Most Often as a Snack (% selecting)</td>
<td>26%</td>
<td>17%</td>
<td>+9pts</td>
<td></td>
</tr>
<tr>
<td>Nut Eaten Most Often in Other Foods (% selecting)</td>
<td>21%</td>
<td>15%</td>
<td>+6pts</td>
<td></td>
</tr>
<tr>
<td><strong>Attitudes</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Almond Liking (top-2 box, 9/10 on 10pt scale)</td>
<td>51%</td>
<td>45%</td>
<td>+6pts</td>
<td></td>
</tr>
<tr>
<td>Almond Healthfulness (top-2 box, 9/10 on 10pt scale)</td>
<td>52%</td>
<td>48%</td>
<td>+4pts</td>
<td></td>
</tr>
<tr>
<td>Almond Delivery on… (% excellent/good, top-3)</td>
<td>84%</td>
<td>77%</td>
<td>+7pts</td>
<td></td>
</tr>
<tr>
<td>Is a healthy food</td>
<td>82%</td>
<td>66%</td>
<td>+16pts</td>
<td></td>
</tr>
<tr>
<td>Great for sharing</td>
<td>82%</td>
<td>66%</td>
<td>+16pts</td>
<td></td>
</tr>
<tr>
<td>Tastes great</td>
<td>82%</td>
<td>66%</td>
<td>+16pts</td>
<td></td>
</tr>
<tr>
<td>Almonds as the nut best described by… (top-3)</td>
<td>24%</td>
<td>16%</td>
<td>+8pts</td>
<td></td>
</tr>
<tr>
<td>Best tasting nut</td>
<td>23%</td>
<td>n/a</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Good for giving as a gift</td>
<td>22% (tie)</td>
<td>15%</td>
<td>+7pts</td>
<td></td>
</tr>
<tr>
<td>My favorite nut (Know the origin / High in vitamin E)</td>
<td>22%</td>
<td>15%</td>
<td>+7pts</td>
<td></td>
</tr>
</tbody>
</table>
what could California Badanmu stand for that has relevance to our consumers?
TARGET AUDIENCE RESONATES WITH BEAUTY BENEFIT
agrees beautiful look is useful as it makes me feel confident, attractive, and young.

Source: <Gender Diversity Benchmark for Asia> & KDNET data-research center
While they spend more and more money on keeping them beautiful from the outside.

<table>
<thead>
<tr>
<th>Year</th>
<th>Value (USD)</th>
<th>YOY Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>8286.8</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>9549.6</td>
<td>10707.4</td>
</tr>
<tr>
<td>2013</td>
<td>11886.9</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>13253.9</td>
<td></td>
</tr>
</tbody>
</table>

China’s face care market (annual value in USD)
“YOU ARE WHAT YOU EAT”

67% AGREE THAT BEAUTY IS ASSOCIATED WITH WHAT YOU EAT, HOW MUCH EXERCISE, AND LIFE BALANCE

Source: Mintel  Facial Skincare - China 2015
GOING FORWARD

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

Marketing Program // 2017 + 2018 Campaign
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
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

- **Food Intros**
  - Europe: 45%
  - Asia-Pacific: 11%
  - North America: 15%
  - Latin America: 22%
  - Middle East & Africa: 7%

- **Nut Intros**
  - Europe: 45%
  - Asia-Pacific: 16%
  - North America: 23%
  - Latin America: 7%
  - Middle East & Africa: 9%

- **Almond Intros**
  - Europe: 47%
  - Asia-Pacific: 19%
  - North America: 20%
  - Latin America: 9%
  - Middle East & Africa: 5%

SOURCE: 2017 Innova Report
AND...

EUROPE INTRODUCED MORE THAN $2\times$ AS MANY ALMOND PRODUCTS AS ANY OTHER REGION

<table>
<thead>
<tr>
<th>Region</th>
<th>Almond Intros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>4,469</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>1,866</td>
</tr>
<tr>
<td>North America</td>
<td>1,772</td>
</tr>
<tr>
<td>Latin America</td>
<td>852</td>
</tr>
<tr>
<td>Middle East &amp; Africa</td>
<td>463</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>9,422</strong></td>
</tr>
</tbody>
</table>

SOURCE: 2017 Innova Report
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%)

SOURCE: 2017 Innova Report
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

Top-of-Mind Awareness
Consumer Perceptions
Snacking Association

SOURCE: 2017 France Consumer AAU
#1

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

SOURCE: 2017 France Consumer AAU
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

<table>
<thead>
<tr>
<th>Market</th>
<th>FY15/16 Almond Snack Volume (change vs YAG)</th>
<th>Almond Snack Volume 4yr CAGR</th>
<th>Almond Snack Value 4yr CAGR</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>12.5%</td>
<td>13.3%</td>
<td>19.7%</td>
</tr>
<tr>
<td>France</td>
<td>10.5%</td>
<td>11.4%</td>
<td>21.3%</td>
</tr>
<tr>
<td>Germany</td>
<td>-6.8%</td>
<td>-2.4%</td>
<td>14.6%</td>
</tr>
</tbody>
</table>

ABC, AAU, 2017
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.
Diwali Gifting: a Big Opportunity
EXPANSION MARKETS
A NEW THRESHOLD OF GROWTH

- Spain: 527M
- China/HK: 527M
- Germany: 527M
- India: 527M
- United States: 639M

Production increase by 2021: +500M
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
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
3 KEY STEPS FOR MARKET OPPORTUNITY ASSESSMENT

- Market Attractiveness Assessment
- Expert Interviews & Secondary Research
- In Market: Primary Consumer & Trade Research
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**

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

Includes seven portion-size packs; sold at drug stores

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

“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
“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.”

“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
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.”
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
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State of the Industry
Tuesday at 4:30 p.m. in Hall C