EUROPEANS’ APPETITE FOR ALMONDS ENDURES AND GROWS
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.
AGENDA

- **Craig Duerr**, Campos Brothers Farms, moderator
- **Beth Van Meter**, Almond Board of California
- **Dariela Roffe-Rackind**, Almond Board of California
- **Kathryn Martino**, Porter Novelli, UK
Pre-Export Check (PEC) Program Update

- PEC began on August 1, 2015
- CY 2016/17, 14,503 PEC Analysis completed
- EU is the almond industry’s largest export market
- ABC met with EU port authorities in September 2017. Authorities all express great trust in the Pre-Export Check program.
- Concerns loom around Low Grade Product that continues to filter into the EU which could potentially harm the reputation of the PEC program.
- In 2017, US peanut’s PEC program was suspended due to increased aflatoxin rejections.
- California Almonds are the only tree nut that maintains a Pre-Export Check Program.

2016/17 Crop Year
- 14,503 PEC Analyses

ALMOND EXPORTS BY REGION

- Western Europe 40%
- Asia-Pacific 38%
- Middle East/Africa 14%
- Canada/Mexico 6%
- Central/Eastern Europe 2%
### Rapid Alert Rejections Due to Aflatoxin

<table>
<thead>
<tr>
<th>Alert ID Number</th>
<th>Country</th>
<th>Date</th>
<th>PEC</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017.AAE</td>
<td>Italy</td>
<td>1/3/2017</td>
<td>NO</td>
<td>Non-handler shipped low grade product. Shipped from huller/sheller facility.</td>
</tr>
<tr>
<td>2017.0021</td>
<td>Slovakia</td>
<td>1/5/2017</td>
<td>N/A</td>
<td>Sample off retail shelf.</td>
</tr>
<tr>
<td>2017.ATZ</td>
<td>Italy</td>
<td>5/3/2017</td>
<td>NO</td>
<td>Known exporter and handler shipped low-grade product. Consignment sent back to US for further processing.</td>
</tr>
<tr>
<td>2017.AUV</td>
<td>Italy</td>
<td>5/8/2017</td>
<td>NO</td>
<td>Known exporter and handler shipped low-grade product. Consignment sent back to US for further processing.</td>
</tr>
<tr>
<td>2017.BMP</td>
<td>Italy</td>
<td>8/14/2017</td>
<td>YES</td>
<td>PEC consignment, re-exported</td>
</tr>
<tr>
<td>2017.CDO</td>
<td>Spain</td>
<td>10/19/2017</td>
<td>Partial</td>
<td>Known exporter and handler shipped mixed load of edible and low grade product. Blanched low-grade product. A portion of this consignment had PEC. Pending disposition.</td>
</tr>
<tr>
<td>2017.BZZ</td>
<td>Spain</td>
<td>11/10/2017</td>
<td>NO</td>
<td>Known exporter and handler shipped low grade product. Pending disposition.</td>
</tr>
<tr>
<td>2017.CAA</td>
<td>Spain</td>
<td>11/10/2017</td>
<td>NO</td>
<td>Known exporter and handler shipped low grade product. Pending disposition.</td>
</tr>
</tbody>
</table>
Low-Grade Product

LOWER GRADE ALMONDS: POTENTIAL IMPACT ON EU PEC PROGRAM

Shipments of low grade almonds and/or "hull" to the EU could raise concerns if not shipped and documented properly.

In the last eleven months of 2017, there have been eight European Union (EU) alerts on rejected Almond shipments, resulting in significant import consignments at the port. The number of notifications/registrations this year already exceeds the past two years combined (1 total reported for 2015 and 2016). This increase has raised concerns in the EU among customs officials and import authorities. The additional scrutiny could push the PEC Reporting Certification (PEC) program for almonds in jeopardy.

Of the inspections this year, all can be attributed to lower grade product which have shipped without adequate testing or sampling -- one of those inspections was for "hull"/shelled almonds from the Philippines. This was an illegal shipment under the provisions of the Federal Marketing Order, and resulted in a complete prohibition on USDA action. The other two inspections were consignment of lower grade product with high yields of damaged and/or aflatoxin.

Currently, Canadian Hazelnut and California Almonds are the only two crops and origins which have been granted PEC approval under Article 43 by the European Commission. Prune growers in the United States recently met with the PEC stakeholders to discuss potential increased aflatoxin requirements on that crop. The risk is that if PEC status for almonds were ever reversed, it would result in significant revenue losses of checks paid at the discretion of each EU port, likely resulting in lost exports.

There are four legal ways in which almonds for food (edible) or feed (non-edible) can be shipped to the EU:

- Hull/Shellable
- Dried Almonds for Food
- Meal (for further processing prior to sale)
- Meal (for further processing after sale)

All shipments (food or feed) for the EU should include the appropriate aflatoxin tests -- PEC Certificates by consignment ready for immediate consumption, and an aflatoxin certificate of analysis (COD) for shipments intended for animal feed. Following are further details on aflatoxin levels and documentation requirements:

<table>
<thead>
<tr>
<th>Product</th>
<th>Total Aflatoxin (ppb)</th>
<th>U. Aflatoxin (ppb)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almonds for Food</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Almonds for Food (huller processing)</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Almonds for Feed</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

*Source: Almonds, Inc.*
The EU is reviewing all pesticides to understand if they have endocrine disruptor, carcinogen, mutagen, or toxic for reproduction properties. EU legislation requires that use of such compounds be “cut-off” from use in the EU. Furthermore, once a compound has been “cut-off”, EU farmers will not be allowed to use these compounds and import Maximum Residue Limits (MRLs) will be removed.

**US and Global Risk Assessment Process**
- Hazard $\times$ Exposure = Risk to human health
- To do a complete risk assessment, scientists need both how hazardous the compound is, as well as risk of exposure to the human body. (e.g. skin contact, diet, water, air etc.)

**EU Risk Assessment Process**
- Hazard $\times$ Exposure = Risk to human health
- If a compound meets one of the cut-off criteria, then EU only considers the hazard. It does not account for human exposure, creating an incomplete picture of risk to human health.

**Glyphosate (Roundup)**
On November 27, 2017 European Commission voted in favor of extending glyphosate’s registration for 5 years.
EU Port Authority Tour of CA Almonds

- Mid-February 2018
- Confirmed: Port Authorities from Greece, Romania, Netherlands, Germany, and Spain
- Confirmed: EU Rapid Alert Office representative
- Authorities will participate in a seminar that will walk them through the entire supply chain from the field all the way to the port
- Several successful tours in the past have resulted in the ABC being invited to speak about the industry in-country
- **If you would like to volunteer your facilities for this tour please contact Beth Van Meter at evanmeter@almondboard.com**
Thank You!
Beth Van Meter
Senior Specialist, Global Technical & Regulatory Affairs
209.343.3256
evanmeter@almondboard.com
EUROPEANS’ APPETITE FOR ALMONDS ENDURES AND GROWS

Dariela Roffe-Rackind
Director Europe & Global Public Relations
Today

QUIZ TIME!
SOME BACKGROUND
TOM AWARENESS

SOURCE: 2017 AAU & 2017 Snacking Study
THERE IS TREMENDOUS INNOVATION IN THE INGREDIENT MARKET IN EUROPE
EUROPE INTRODUCED ______% OF NEW ALMOND PRODUCT INTRODUCTIONS IN 2016 (share of global introductions)
47% of all global new product introductions!
EUROPE DRIVES THE LARGEST SHARE OF INTRODUCTIONS ACROSS THE GLOBE

2016 Global Food, Nut, and Almond Introductions
Regional Share

<table>
<thead>
<tr>
<th>Region</th>
<th>Food Intros</th>
<th>Nut Intros</th>
<th>Almond Intros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>45%</td>
<td>45%</td>
<td>5%</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>22%</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>North America</td>
<td>15%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Latin America</td>
<td>7%</td>
<td>9%</td>
<td>7%</td>
</tr>
</tbody>
</table>

SOURCE: 2017 Innova Report
AND...

**EUROPE INTRODUCED MORE THAN 2X 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>Total</td>
<td>9,422</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%
- Confectionery = 61%
- Snacks = 37%
- Cereal = 42%
- Bars (led by North America = 42%; Europe = 34%)

SOURCE: 2017 Innova Report
NEW PRODUCT DEVELOPMENT DRIVEN BY UK, GERMANY, FRANCE

<table>
<thead>
<tr>
<th>Rank</th>
<th>Region</th>
<th># of introductions (2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United States</td>
<td>891</td>
</tr>
<tr>
<td>2</td>
<td>Germany</td>
<td>544</td>
</tr>
<tr>
<td>3</td>
<td>France</td>
<td>544</td>
</tr>
<tr>
<td>4</td>
<td>United Kingdom</td>
<td>512</td>
</tr>
<tr>
<td>5</td>
<td>Spain</td>
<td>343</td>
</tr>
</tbody>
</table>
RESEARCH CONDUCTED 2016-2017

CONSUMER MOBILE ETHNOGRAPHY

GERMANY DEEP-DIVE
(ALL CATEGORIES)

EU3 SUSTAINABILITY STUDY

ADVERTISING CREATIVE PERFORMANCE TESTING

EU3 SNACKING STUDY
UK GAINING MOMENTUM
I’m feeling out of control, constantly struggling with my weight, yo-yo dieting, longing for a healthier lifestyle.

I’d love to find a mid-day snack that’s healthy, satisfying and guilt free.
I’m feeling out of control, constantly struggling with my weight, yo-yo dieting, longing for a healthier lifestyle.

I’d love to find a mid-day snack that’s healthy, satisfying and guilt free.
GAINING MOMENTUM

Awareness
Association with Snacking
Volume
Value
#1 in Healthfulness
#1 Positive Story Recall

SOURCE: 2016 Global Perceptions
QUIZ TIME!
ALMONDS ARE RANKED 3rd IN THE UK FOR SNACK ASSOCIATION
- WHAT NUT IS #1?
- WHAT NUT IS #2?

SOURCE: 2017 UK Consumer AAI
#1 NUT = PEANUTS
#2 NUT = CASHEWS

SOURCE: 2017 UK Consumer AAU
Q5: Now, think for a moment about nuts as a snack (i.e. a food eaten between meals or instead of a meal), as a whole nut. When you think about eating whole nuts by themselves apart from a meal, what one type of nut FIRST comes to mind?

SOURCE: 2017 UK Consumer AAU
WHAT WE’RE DOING
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
FRANCE
HOT RIGHT NOW
I live a balanced, healthy life and approach food with an "everything in moderation" mentality.

I’m concerned about environmental issues and the impact I can have on the planet.

I need snacks that are natural, unprocessed, and can keep me satisfied in between meals.
FR JANE

PURCHASE POWER

SOCIAL AT HOME

SELF-CARE

J’

HEALTH-EMPOWERED

CULINARY-INCLINED

ROUTINE SNACKERS
ALMONDS ARE HOT IN FRANCE

Top-of-Mind Awareness
Consumer Perceptions
Snacking Association
Volume
Value

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
QUIZ TIME!
WHAT WAS THE % OF TOP-OF-MIND AWARENESS OF ALMONDS IN 2007? (among French Jane)
1% = 2007

SOURCE: 2017 France Consumer AAI
WHAT WAS THE % OF TOP-OF-MIND AWARENESS OF ALMONDS IN 2017? (among French Jane)
29% = 2017

SOURCE: 2017 France Consumer AAU
ALL MEASURES HAVE SEEN SIGNIFICANT GROWTH THE PAST TWO YEARS! AND DOUBLE-DIGIT GROWTH IN TOP-OF-MIND AWARENESS AMONG FRENCH JANES (29%, +11pts).

### Top-Of-Mind Awareness (FR Jane)

![Graph showing top-of-mind awareness from 2007 to 2017](image)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Total Pop.</th>
<th>FR Janes</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOM Awareness (first mention)</td>
<td>20%</td>
<td>29%</td>
</tr>
<tr>
<td>Total Awareness (any mention)</td>
<td>61%</td>
<td>63%</td>
</tr>
<tr>
<td>Association with Snacking</td>
<td>28%</td>
<td>35%</td>
</tr>
</tbody>
</table>

**SOURCE:** 2017 France Consumer AAU
ALMONDS ARE THE #2 NUT FOR TOP-OF-MIND AWARENESS IN FRANCE.
WHAT NUT IS #1 IN FRANCE?

SOURCE: 2017 France Consumer AAU
TOP-OF-MIND AWARENESS

Top-of-Mind Awareness
(n=1,000)

Q1: When you think of nuts, which nuts come to mind? (Open-end)

SOURCE: 2017 France Consumer AAU
**BUT ALMONDS LEAD WALNUTS IN HEALTH PERCEPTIONS!**

Nut Healthfulness: Top-3 Box  
(n=1,000)

<table>
<thead>
<tr>
<th>Nut</th>
<th>Healthfulness Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almonds</td>
<td>8.2</td>
</tr>
<tr>
<td>Walnuts</td>
<td>7.9</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>7.8</td>
</tr>
<tr>
<td>Pine Nuts</td>
<td>7.3</td>
</tr>
<tr>
<td>Cashews</td>
<td>7.1</td>
</tr>
<tr>
<td>Pecans</td>
<td>7.1</td>
</tr>
<tr>
<td>Macadamias</td>
<td>7.1</td>
</tr>
<tr>
<td>Brazil Nuts</td>
<td>7.1</td>
</tr>
<tr>
<td>Pistachio Nuts</td>
<td>7.0</td>
</tr>
<tr>
<td>Peanuts</td>
<td>5.7</td>
</tr>
</tbody>
</table>

Q11: Now using a scale from 1 to 10, this time where 1 means not healthy at all and 10 means extremely healthy, please rate the following nuts.

SOURCE: 2017 Fannie Consumer AAU
AND...FOR THE 1st TIME EVER, ALMONDS HAVE SURPASSED WALNUTS & PEANUTS, NOW BEING THE #1 NUT WHEN THINKING ABOUT A SNACK (28%)!

**Snack Association**
(n=1,000)

Q2: Now, think for a moment about nuts as a snack (i.e. a food eaten between meals or instead of a meal), as a whole nut. When you think about eating whole nuts by themselves apart from a meal, what one type of nut FIRST comes to mind?

SOURCE: 2017 France Consumer AAU
I live a balanced, healthy life and approach food with an "everything in moderation" mentality.

I’m concerned about environmental issues and the impact I can have on the planet.

I need snacks that are natural, unprocessed, and can keep me satisfied in between meals.
MEDIA COVERAGE

L'OEIL DU MONDE
L'amande, reine de Californie
En l'espace de dix ans, la « Central Valley » a doublé la surface de ses vergers pour produire le fruit à coque. En apportant près de 80% des volumes vendus sur la planète, elle écace toute concurrence.

Une culture trop gourmande

En Europe

La culture d'amandes est désormais plus rentable que les vergers traditionnels. Sur une surface de 10 000 hectares, les producteurs californiens produisent chaque année 2 millions de tonnes d'amandes, soit plus que l'ensemble de l'Europe.

En abeilles

300 000

Les producteurs californiens ont conçu une méthode de pollinisation innovante : l'introduction de millions d'abeilles pour assurer la fécondation des amandes. Cette pratique est maintenant adoptée par tous les producteurs de l'État.

Des milliards d'abeilles à louer

En février, pendant quinze jours, 90 millions d'amandiers fleurissent

En Californie, la pollinisation des amandiers de Californie est assurée par des abeilles qui volent sans cesse à travers les vergers. Cela permet aux producteurs de réaliser des gains significatifs.

Le Monde
SUSTAINABILITY EDUCATION

California Almonds

Savez-vous que, en réalité, les amandiers et l'eau utilisée pour les cultiver ne produisent pas un, mais trois produits d'efficacité ? En plus de notre délicieuse noix, il y a la cosses utilisée pour nourrir le bétail, et la coque utilisée. Libre de ces déserts, l'amande en même temps réutilisé à la fin de la vie créera des énergies alternatives ou améliorera le sol de la terre.

California Almonds

La culture des amandes peut-elle devenir « zéro déchet » ?

La culture des amandes en Californie a produit 550 000 tonnes de noix, 700 000 tonnes de noix et 600 000 tonnes de noix. Ainsi, une grande partie de l'effort des éco-aménétaires est consacrée à la production de noix d'amande. La recherche sur la culture des amandes a permis de découvrir de nouvelles techniques et de diminuer l'impact environnemental de la culture de ces fruits. Les techniques d'agriculture biologique ont été adaptées pour permettre une culture plus durative et plus tolérante aux variations climatiques. Les résultats de ces recherches sont maintenant intégrés dans les exploitants de la Californie, ce qui permet de réduire l'impact environnemental de la culture d'amandes.
WHAT WE’RE DOING
TOP 3 OPPORTUNITIES IN FRANCE

1. Capitalize on momentum and explore growth opportunities

2. Educate on evidence around calories and fat and benefits of eating 28g

3. Tell our sustainability story even more proactively
GERMANY
GROWTH OPPORTUNITY
TOM AWARENESS
SNACK ASSOC.

SOURCE: 2017 AAU & 2017 Snacking Study

UK  FR  DE


RESULT OF THE LONG-TERM SNACKING STRATEGY

Top Of Mind Awareness (AAU)

Snack Association (AAU)
ALMONDS ASSOCIATION WITH SNACKING IS LOW. BUT ASSOCIATION WITH ___ IS VERY HIGH
BAKING

ALMONDS ARE STRONGLY ASSOCIATED WITH BAKERY IN GERMANY

SOURCE: 2017 Germany Consumer AAU
BAKING ASSOCIATION

Category Association with Almonds: Bakery By Country

Q1: When you think of nuts, which nuts come to mind? (Open-end)

SOURCE: 2017 Germany Consumer AAU
ALMONDS ARE THE 2\textsuperscript{ND} BEST LIKED NUT IN GERMANY. WHAT NUT IS #1?
PEANUTS

ALMONDS HAVE THE 2nd HIGHEST LIKING SCORE BEHIND #1 PEANUTS – AND AHEAD OF WALNUTS AND HAZELNUTS

SOURCE: 2017 Germany Consumer AAU
NUT LIKING

Peanuts: 66% (8), 15% (9), 18% (10)
Almonds: 63% (8), 17% (9), 18% (10)
Walnuts: 63% (8), 15% (9), 18% (10)
Hazelnuts: 61% (8), 15% (9), 28% (10)
Cashews: 59% (8), 15% (9), 32% (10)
Pistachio Nuts: 58% (8), 14% (9), 30% (10)
Macadamias: 45% (8), 12% (9), 45% (10)
Brazil Nuts: 36% (8), 10% (9), 16% (10)
Pine Nuts: 36% (8), 11% (9), 5% (10)
Pecans: 24% (8), 9% (9), 8% (10)

Average Liking Score:
- Peanuts: 8.0
- Almonds: 7.8
- Walnuts: 7.7
- Hazelnuts: 7.7
- Cashews: 7.5
- Pistachio Nuts: 7.4
- Macadamias: 6.9
- Brazil Nuts: 6.4
- Pine Nuts: 6.3
- Pecans: 5.8

Q16: Using a scale from 1 to 10, where 1 means you don’t like them at all and 10 means you like them extremely well, please rate each of the following nuts.

SOURCE: 2017 Germany Consumer AAAU
ALMONDS ARE RANKED #2 FOR HEALTHFULNESS IN GERMANY. WHAT NUT IS #1?
WALNUTS

WALNUTS ARE VIEWED AS THE HEALTHIEST NUT IN GERMANY. WITH ALMONDS AND HAZELNUTS TIED FOR 2ND PLACE

SOURCE: 2017 Germany Consumer AAU
## NUT HEALTHFULNESS

**Nut Healthfulness: Top-3 Box**
(n=1,000)

<table>
<thead>
<tr>
<th></th>
<th>8</th>
<th>9</th>
<th>10 - Extremely healthy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walnuts</td>
<td>66%</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>Almonds</td>
<td>54%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>48%</td>
<td>21%</td>
<td>15%</td>
</tr>
<tr>
<td>Pine Nuts</td>
<td>47%</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Cashews</td>
<td>44%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Brazil Nuts</td>
<td>42%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Macadamias</td>
<td>41%</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>Pistachio Nuts</td>
<td>43%</td>
<td>20%</td>
<td>11%</td>
</tr>
<tr>
<td>Pecans</td>
<td>36%</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Peanuts</td>
<td>36%</td>
<td>16%</td>
<td>10%</td>
</tr>
</tbody>
</table>

### Average Liking Score

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Walnuts</td>
<td>8.0</td>
</tr>
<tr>
<td>Almonds</td>
<td>7.8</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>7.7</td>
</tr>
<tr>
<td>Pine Nuts</td>
<td>7.7</td>
</tr>
<tr>
<td>Cashews</td>
<td>7.5</td>
</tr>
<tr>
<td>Brazil Nuts</td>
<td>7.4</td>
</tr>
<tr>
<td>Macadamias</td>
<td>6.9</td>
</tr>
<tr>
<td>Pistachio Nuts</td>
<td>6.4</td>
</tr>
<tr>
<td>Pecans</td>
<td>6.3</td>
</tr>
<tr>
<td>Peanuts</td>
<td>5.8</td>
</tr>
</tbody>
</table>

Q17: Now using a scale from 1 to 10, this time where 1 means not healthy at all and 10 means extremely healthy, please rate each of the following nuts.

SOURCE: 2017 Germany Consumer AAA
TIME TO INVEST IN GERMANY

THE CHALLENGE AHEAD IS TO CHANGE THE PERCEPTION OF ALMONDS FROM A BAKING INGREDIENT INTO A HEALTHY, MID-DAY SNACK.
AND BUILD ON POSITIVE PERCEPTIONS OF ALMONDS
Snacking is a key part of my diet and something I look forward to. Snacks be tasty, but also provide energy and be healthy.

Most of the snacks for in-between that are tasty and high in energy make me feel heavy and weighed down.
Snacking is a key part of my diet and something I look forward to. Snacks be tasty, but also provide energy and be healthy.

**THE DE-LIGHTFUL SNACKER**

Almonds are a delightful mid-day snack—naturally rich, but light and easy to eat everyday.

Most of the snacks for in-between that are tasty and high in energy make me feel heavy and weighed down.
WHAT WE’RE DOING
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. Get the trade on-board so product on shelf reflects positioning and inspires purchase
THE EU3 IS NOW...
THE EU4
ITALY
coming soon...
THE FUTURE OF FOOD

Kathryn Martino
Director, Food & Nutrition, Porter Novelli
London
STRIPPING DOWN
THE WORLD’S FIRST NAKED RESTAURANT: LONDON
SNAPCHAT STORIES PROVE FISH IS 24-HOURS FRESH
CREATIVE SUSTAINABILITY
THE GRAND BEEDAPEST HOTEL: WORLD’S FIRST HOTEL FOR BEES
“ZILLA EGGS”
HEALTHONISM
NUT BUTTER FONDUE
MONARCH AIRLINE’S IN-FLIGHT ‘MOOD FOOD’
CHOCOLATE THAT IMPROVES GUT HEALTH
WHAT DOES THIS MEAN FOR ALMONDS?

**Almonds = 100% natural**

**Opening up the orchards**

**23 Servings of Sustainability**

**Almond by-product snack bar**

**Snacking Good!**

**Almonds + chocolate = health halo**

**The most researched nut**

**An even more super superfood**
Thank you!
Use #AlmondConf to be part of the conversation on Facebook and Twitter
What’s Next

Almond Stage Presentation at 3:00 p.m.

• How Important is the Quality of Data from In-Field Sensors in Making Accurate Navel Orangeworm Treatment Decisions in Almonds?, presented by Semios

Almond Stage Presentation at 3:30 p.m.

• Navigate Your Utility Bill, presented by Coldwell Solar

3:00 p.m. – 5:00 p.m. Coffee Break is sponsored by Actagro