Creating Consumer Demand Around the World
Mark Masten, Moderator
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Creating Consumer Demand Around the World

Moderator:

Mark Masten, Paramount Farms

Presenters:

Maggie Jiang, Hill and Knowlton China

Stacey Humble, ABC

Dariela Roffe-Rackind, ABC

Becky Sereno, ABC
Capturing the Hearts and Minds of China’s New Consumers

Maggie Jiang, Hill and Knowlton China
China Overview

China’s NEW Consumers

New Consumers & Almonds

Almond Board China Consumer Marketing Program Overview
China Overview
World’s Second Largest Economy (by PPP)

- GDP Growth
  2007: 11.9%
  2008: 9.0%
  2009: 9.1%
  2010: 10% (forecast)

- Per Capita GDP
  World Bank: $6,838
  CIA: $6,600
  IMF: $6,778

Unemployment: 4.2% officially in urban areas, but including migrants may be as high as 9%

Source: CIA World Fact Book, EIU, 2009, in PPP
Main population centers in the North, East and South are driving growth

Source: UN
Almond Exports to China

California Almond exports over the past couple years have increased leaps and bounds.

End of FY 09/10 China was the 2nd largest export market for California Almonds.

Source: Almond Board of California Position Reports
China’s NEW Consumer
Urban Migration: The largest migration in human history

- More than 210 million people have moved to the cities
- At least 1.5 percent rural to urban migration annually
- Migrant labor is expected to increase to 300 million by 2020
- Urbanization to reach 55 percent by 2020
- More urban poor, less rural labor, “urbanization in place”

Why: Enormous difference in urban-rural incomes & reduction in internal controls

Source: China National Statistical Bureau, McKinsey & Standard-Charter
Change Driver #2: Aging Population

China’s Population is aging rapidly

• Elderly will increase from 167 million (13 percent) in 2010 to 300 million (31 percent) in 2050
• Increasing number of “empty nesters”

Why: Effect of one-child policy since 1979
China grows old as it grows richer...

Source: United Nations
China’s population is entering the middle class

- Currently around 100 to 150 million people
- Expected to be reach 300 million by 2015
- Annual wage growth of 10-15 percent likely to continue
- Government policy of a "well-to-do society" by 2020
- Poverty to fall from 77 percent in 2005 to 15 percent in 2020

Why: Thirty years of 8-12 percent growth
A New Middle Class Society

The rising middle class...

Source: Global Insight Global Consumer Markets Service & FAS China Forecast
A New Middle Class Society

…with more to spend on food

Source: Global Insight Global Consumer Markets Service & FAS China Forecast
A New Middle Class Society

Where they are spending on food...

Source: China Statistical Yearbook, 2008
Primary Target Amongst “New” Consumers: Working Women

Upwardly mobile, young women working “white collar” office jobs in big cities are prime consumers with disposable income and penchant to be on-trend

Meet Jing!
Family-oriented, trying to keep a harmonious and happy family
- Family members are the center of their lives
- And as a mother, her kid is the most important person in her life
- To take good care of the family, and to make the whole family healthy are their upmost concerns.

Health-conscious with key interests at different stages of life

Brand conscious & in pursuit of quality life;  Want to be perceived as a tasteful & trendy woman

Feel stress because of “double pressure”:
- Tough competition at work
- Family responsibilities

A good relationship with friends is also important for them
- Going Shopping, chatting and dining out are popular ways of spending time with friends
- Enjoying personal life is also essential in their life
Jing and Almonds
Data collection method

• Face-to-face interviewing at central locations with respondents recruited via street intercept

Sample size

• 250 per city and total sample size is 1250

Respondent criteria:

• Decision maker of household grocery purchase
• Aged 18 to 54
• Gender: 70% female vs. 30% male
• Medium or high household income level

Fieldwork conducted: July 2009

12 focus group sessions conducted in March 2010 in Beijing, Shanghai and Guangzhou
Almond, Hazelnut and Pistachio are comparatively similar in terms of their premium quality and enjoyable properties.
Almonds, Hazels and Pistachios

**California Almond**

- Sweet after taste
- High convenience to eat
- High nutrition compared with others
  - Unsaturated fatty acid
  - Dietary fibre
- Stronger functions compared with other nuts
  - Whitening
  - Good for heart disease
  - Keep fit

**Hazelnut**

- The taste of Hazelnut is perceived to have better aroma
- However, it is perceived to be too oily to eat much

**Pistachio**

- The Chinese name of Pistachio is auspicious
- Its crispy mouth feel is liked by the most

Source: Synovate China, 2009
Awareness of Almonds is Very High; Frequent Consumption is Fairly Low

<table>
<thead>
<tr>
<th>%</th>
<th>TOM</th>
<th>Unaided</th>
<th>Awareness</th>
<th>P1Y Consumed</th>
<th>P1Y Most Often Consumed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peanuts</td>
<td>18</td>
<td>46</td>
<td>100</td>
<td>95</td>
<td>36</td>
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<tr>
<td>Seeds</td>
<td>6</td>
<td>31</td>
<td>99</td>
<td>86</td>
<td>15</td>
</tr>
<tr>
<td>Pistachios</td>
<td>12</td>
<td>42</td>
<td>99</td>
<td>87</td>
<td>14</td>
</tr>
<tr>
<td>Almonds</td>
<td>34</td>
<td>67</td>
<td>99</td>
<td>90</td>
<td>13</td>
</tr>
<tr>
<td>Walnuts</td>
<td>11</td>
<td>46</td>
<td>99</td>
<td>95</td>
<td>9</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>6</td>
<td>27</td>
<td>82</td>
<td>63</td>
<td>6</td>
</tr>
<tr>
<td>Cashew nuts</td>
<td>4</td>
<td>22</td>
<td>94</td>
<td>58</td>
<td>5</td>
</tr>
<tr>
<td>Hickory nuts</td>
<td>1</td>
<td>9</td>
<td>86</td>
<td>73</td>
<td>3</td>
</tr>
<tr>
<td>Chestnuts</td>
<td>1</td>
<td>7</td>
<td>97</td>
<td>65</td>
<td>2</td>
</tr>
<tr>
<td>Pine nuts/kernels</td>
<td>2</td>
<td>20</td>
<td>94</td>
<td>61</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Synovate China, 2009
Base: all respondents (n=1265) Nut Awareness & Consumption
The World of California Almonds

Happiness

Elegance

Premium

Tasty

Fun

Comfortable

Natural

Enjoyment

Sharing

Relaxation

Pleasant

Admirable lifestyle

Good for health

Keep fit

Crispy

香脆可口

有益健康

保持健康

Romantic

Beauty

浪漫

美丽

Source: Synovate China, 2009
Strong Consumer Preference for Almonds

- 88% prefer almond containing products to similar non-almond products
- 85% willing to pay a premium for almond-containing products!

Source: Synovate China, 2009
Almond Purchase Behavior

Planned finders primarily driven by health benefits while impulsive buyers driven by taste more

When to Decide Buying Nuts

Planned Finder

- **45%**
- **Key Purchase Drivers (%)**
  - Health benefits: 41%
  - Taste: 18%
  - Quality: 16%
  - Price: 14%
  - Brand: 4%
  - Food safety: 2%
  - Word-of-mouth: 1%
  - Packaging: 1%

Unplanned Decider

- **46%**
- **Key Purchase Drivers (%)**
  - Health benefits: 27%
  - Taste: 33%
  - Quality: 16%
  - Price: 10%
  - Brand: 3%
  - Food safety: 1%
  - Word-of-mouth: 3%
  - Packaging: 3%

Source: Synovate China, 2009
Base: P1Y purchasers of American almonds (n=1074)
Almond Board China Consumer Marketing Program Overview
## Strategic Approach to Reach Jings

### Objective
- Increase year round almond consumption by target consumers and her family: “a handful of almonds for Jings every day”

### Desired Behavior
- Make almonds central and essential to their daily snacking habits
- Share almonds with family and friends

### Communications Strategy
- Build loyal consumer demand for almonds as an aspirational, healthy snack through a unified and targeted snack campaign
Holistic Program with Multiple Touch Points for Jing

**Engage Celebrity Ambassador Gao Yuan Yuan for a second year**

**Integrated Marketing Event**
- Call consumer to action, more direct consumer interaction
- Attend 2 integrated marketing event (welcoming festival and office lady challenge)
- Arrange media interviews and have ambassador endorsements to reinforce almonds messages

**California Experiential Tour**
- Gao Yuan Yuan tours almond orchards in California with 2 television crews and photographer
- Use coverage on TV shows and throughout rest of campaign

**Media Events**
- Attend media events in BJ and SH
- Arrange media interviews and have ambassador endorsements to reinforce almond messages

**Media Partnerships**
- Print media in-depth interviews and cover stories
- Interviews on TV partnerships
- Ambassador endorsements to enrich partnership content

**Digital Marketing**
- Ambassador endorsement and PR photo usage on BBS and blog posts
- Ambassador micro-blog

**Use Ambassador Image and Quotes**
- Use her image and quotes and apply to different communication channels
- Use her image in communication activities and in-store promotion
Almond Board Website in China

www.meiguoxingren.com.cn
Thank You
Creating Healthy Demand for Almonds in the U.S.

Stacey Humble, Almond Board of California
U.S. Overview

• U.S. Market

• U.S. Research Investment

• U.S. Almond Usage Assessment

• Understanding Core Target Audience – Jane
  • Attitudes about Nuts and Almonds

• U.S. Outlook on Growth

• Almond Board North American Marketing Program Overview
The United States Market is critical to meeting overall global supply for a variety of reasons:

- Accounted for 34% of crop in 2009
- Investment in core target, Jane, has driven growth and additional targets are growing
- Programs are measurable and the quality and frequency of market research provides significant insights to industry and staff
- Programs are leveraged around the world:
  - Trade
  - Consumer
  - Research
  - Health Professional and Nutrition program
- Concentration of global food manufacturers in U.S. allow for efficient global communication
- Critical to continue to invest and not fragment efforts in order to reach goal
Research Investment
• **Ingredient Why: Healthy Men 2009**
  - An online survey of 2,005 U.S. Healthy Men to identify ideal components of products in important almond categories, assess preference for almonds versus other ingredients options and understand the key benefits of almonds as an ingredient

• **NA Breakfast Outlook 2009**
  - An online survey of 2,001 U.S. and 400 Canadian consumers examining the breakfast landscape, assessing the current state of the cereal category and identifying opportunities for almonds at the breakfast occasion

• **NA Consumer AAU 2009**
  - An online survey of 1,503 U.S. and 501 Canadian consumers monitoring almond awareness, attitudes and usage

• **NA Grocery Exploration 2009**
  - A snapshot of North American consumers’ food shopping behaviors, attitudes and purchase decisions

• **U.S. Retail Product Movement 2009**

• **U.S. Menu Insights 2009**
  - A tracking study reporting the use of almonds in 549 U.S. chain, independent and chef-owned restaurants in Mintel’s Menu Insights
For the second year, almonds are the number one nut introduced globally

- The gap between almonds and peanuts (number two nut) widened 2% points and almonds’ share of new food and new nut introductions increased

2009 Share of Nut Introductions

<table>
<thead>
<tr>
<th>Nut Type</th>
<th># of Intros</th>
<th>Share of Food Intros</th>
<th>Share of Nut Intros**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almonds</td>
<td>1,544</td>
<td>2.22%</td>
<td>22%</td>
</tr>
<tr>
<td>Peanuts</td>
<td>1,374</td>
<td>1.98%</td>
<td>20%</td>
</tr>
<tr>
<td>Hazelnuts</td>
<td>1,120</td>
<td>1.61%</td>
<td>16%</td>
</tr>
<tr>
<td>Cashews</td>
<td>427</td>
<td>0.62%</td>
<td>6%</td>
</tr>
<tr>
<td>Walnuts</td>
<td>370</td>
<td>0.53%</td>
<td>5%</td>
</tr>
<tr>
<td>Pistachios</td>
<td>273</td>
<td>0.39%</td>
<td>4%</td>
</tr>
<tr>
<td>Pecans</td>
<td>283</td>
<td>0.41%</td>
<td>4%</td>
</tr>
<tr>
<td>Macadamia Nuts</td>
<td>160</td>
<td>0.23%</td>
<td>2%</td>
</tr>
<tr>
<td>Other Nuts*</td>
<td>1,439</td>
<td>2.07%</td>
<td>21%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>6,990</td>
<td>100%</td>
<td>7,814</td>
</tr>
</tbody>
</table>

*All other nuts include all products that contain nuts where no specific nut was identified, smaller nuts such as brazil nuts, and non-nuts such as pine and soy nuts.

**Share based on total nut mentions (base counts each nut mention for introductions with multiple nuts); therefore, share is understated.

Source: Mintel Global, New Products Database 2009
Despite growth in almond products across categories being less than 1% in 2009, estimated pounds of almonds sold increased 6%.

- Snacking continues to drive increases

<table>
<thead>
<tr>
<th>Category</th>
<th>Almond Product Pounds</th>
<th>Percentage Change '08 to '09</th>
<th>Estimated % Almonds</th>
<th>Estimated Almond Pounds</th>
<th>Percentage Change '08 to '09</th>
<th>Almond Pounds</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>'08</td>
<td>'09</td>
<td></td>
<td></td>
<td>'08</td>
<td>'09</td>
</tr>
<tr>
<td>Snack Nuts – Pure</td>
<td>44</td>
<td>55</td>
<td>25%</td>
<td>100%</td>
<td>44</td>
<td>55</td>
</tr>
<tr>
<td>Snack Nuts – Mixed</td>
<td>57</td>
<td>56</td>
<td>-1%</td>
<td>12%</td>
<td>6.8</td>
<td>6.7</td>
</tr>
<tr>
<td>Chocolate Candy</td>
<td>83</td>
<td>73</td>
<td>-11%</td>
<td>27%</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>RTE Cereal</td>
<td>156</td>
<td>144</td>
<td>-8%</td>
<td>12%</td>
<td>19</td>
<td>17</td>
</tr>
<tr>
<td>Ice Cream</td>
<td>106</td>
<td>124</td>
<td>17%</td>
<td>10%</td>
<td>11</td>
<td>12</td>
</tr>
<tr>
<td>Frozen Novelties</td>
<td>31</td>
<td>29</td>
<td>-6%</td>
<td>15%</td>
<td>4.6</td>
<td>4.3</td>
</tr>
<tr>
<td>Baking Nuts – Pure</td>
<td>10</td>
<td>9</td>
<td>-1%</td>
<td>100%</td>
<td>10</td>
<td>9</td>
</tr>
<tr>
<td>Baking Nuts – Mixed</td>
<td>2.7</td>
<td>2.7</td>
<td>0%</td>
<td>12%</td>
<td>0.3</td>
<td>0.3</td>
</tr>
<tr>
<td>Granola Bars</td>
<td>110</td>
<td>106</td>
<td>-4%</td>
<td>10%</td>
<td>11</td>
<td>11</td>
</tr>
<tr>
<td>Energy Bars</td>
<td>19</td>
<td>22</td>
<td>14%</td>
<td>15%</td>
<td>2.8</td>
<td>3.2</td>
</tr>
<tr>
<td>Cookies</td>
<td>3.8</td>
<td>4.3</td>
<td>14%</td>
<td>14%</td>
<td>0.5</td>
<td>0.6</td>
</tr>
<tr>
<td>Biscotti</td>
<td>3.3</td>
<td>3.5</td>
<td>6%</td>
<td>7%</td>
<td>0.2</td>
<td>0.2</td>
</tr>
<tr>
<td>TOTAL</td>
<td>624</td>
<td>628</td>
<td>0.6%</td>
<td></td>
<td>131</td>
<td>139</td>
</tr>
</tbody>
</table>

*An average percentage of almonds included in products by category was created based on discussions with formulation experts. Note: Volume in millions of pounds.
Category Summaries: Estimated Almond Pounds

It is estimated that 271 million pounds of almonds were sold through retail channels in 2009 (approximately 65% of domestic shipments).

- Over half (51%) of what is sold in retail is in the snack and baking nut categories

<table>
<thead>
<tr>
<th>Almond Product</th>
<th>Almond Pounds</th>
<th>Percentage Almonds*</th>
<th>Estimated Almond Pounds (IRI)</th>
<th>Category Coverage**</th>
<th>Total Estimated Almond Pounds</th>
<th>Share of Total Estimated Almond Pounds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Snack Nuts – Pure</td>
<td>54.5</td>
<td>100%</td>
<td>54.5</td>
<td>51%</td>
<td>106.9</td>
<td>39.5%</td>
</tr>
<tr>
<td>Snack Nuts – Mixed</td>
<td>56.3</td>
<td>12%</td>
<td>6.8</td>
<td>51%</td>
<td>13.2</td>
<td>4.9%</td>
</tr>
<tr>
<td>Chocolate Candy</td>
<td>73.1</td>
<td>27%</td>
<td>19.7</td>
<td>29%</td>
<td>68.1</td>
<td>25.2%</td>
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<tr>
<td>RTE Cereal</td>
<td>143.7</td>
<td>12%</td>
<td>17.2</td>
<td>77%</td>
<td>22.4</td>
<td>8.3%</td>
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<tr>
<td>Ice Cream</td>
<td>123.8</td>
<td>10%</td>
<td>12.4</td>
<td>68%</td>
<td>18.2</td>
<td>6.7%</td>
</tr>
<tr>
<td>Frozen Novelties</td>
<td>28.8</td>
<td>15%</td>
<td>4.3</td>
<td>82%</td>
<td>5.3</td>
<td>1.9%</td>
</tr>
<tr>
<td>Baking Nuts – Pure</td>
<td>9.4</td>
<td>100%</td>
<td>9.4</td>
<td>51%</td>
<td>18.4</td>
<td>6.8%</td>
</tr>
<tr>
<td>Baking Nuts – Mixed</td>
<td>2.7</td>
<td>12%</td>
<td>0.3</td>
<td>51%</td>
<td>0.6</td>
<td>0.2%</td>
</tr>
<tr>
<td>Granola Bars</td>
<td>106</td>
<td>10%</td>
<td>10.6</td>
<td>88%</td>
<td>12</td>
<td>4.5%</td>
</tr>
<tr>
<td>Energy Bars</td>
<td>21.6</td>
<td>15%</td>
<td>3.2</td>
<td>88%</td>
<td>3.7</td>
<td>1.4%</td>
</tr>
<tr>
<td>Cookies</td>
<td>4.3</td>
<td>14%</td>
<td>0.6</td>
<td>52%</td>
<td>1.2</td>
<td>0.4%</td>
</tr>
<tr>
<td>Biscotti</td>
<td>3.5</td>
<td>7%</td>
<td>0.2</td>
<td>52%</td>
<td>0.5</td>
<td>0.2%</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>627.7</strong></td>
<td></td>
<td><strong>139.3</strong></td>
<td></td>
<td><strong>270.5</strong></td>
<td></td>
</tr>
</tbody>
</table>

*An average percentage of almonds included in products by category was created based on discussions with formulation experts.
**Based on Euromonitor category totals.
U.S. Target Audience
Our almond consumer target audience is defined as:

- United States “Appetite for Life” – 51% of the U.S. market

**Primary:** Jane
- U.S. women 35+
  - 21% of the adult population
  - 46 million women

**Secondary:** Healthy Men
- U.S. men
  - 16% of the adult population
  - 35 million men

**Tertiary:** Jenny
- U.S. younger women 25–34
  - 5% of the adult population
  - 10.9 million
Jane Profile

- 21% of the population can be classified as Jane. She contributes 26% of the almond occasions.
- Jane enjoys trying new grocery products and recommending them to her friends. But overall, she is not quite adventurous as other segments when it comes to food and restaurants – as she often choose health over bold and exciting flavors.
- Jane exercises regularly and watches her calorie intake and therefore most are successful at maintaining a healthy weight.
- Jane has a well defined understanding of the healthiness of almonds and gives them the highest health rating of any segment. Walnuts are also strong. Her usage of almonds is very high, but she still picks cashews as her favorite. When Jane eats nuts, they tend to be almonds
  - Although Jane’s weekly nut purchases are lower than any other group, her strong preference for almonds contributes to above average consumption of almonds

  Jane is a woman 35+, who is typically married
  - 45% have kids at home
  - 42% graduated college, and 57% earn more than $50K annually. Her income is above average, but is not “high income”

### Nut Usage

<table>
<thead>
<tr>
<th>Nut with highest weekly usage</th>
<th>Almonds 41%</th>
</tr>
</thead>
<tbody>
<tr>
<td>% eating almonds weekly</td>
<td>41%</td>
</tr>
<tr>
<td>Favorite nut</td>
<td>Cashews 33%</td>
</tr>
<tr>
<td>% claiming almonds as favorite</td>
<td>26%</td>
</tr>
</tbody>
</table>

### Attributes Most Strongly Associated with Almonds

<table>
<thead>
<tr>
<th>Natural</th>
<th>66%</th>
<th>Good for the heart</th>
<th>71%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nutritious</td>
<td>64%</td>
<td>More nutrients</td>
<td>69%</td>
</tr>
<tr>
<td>Good tasting food</td>
<td>63%</td>
<td>Maintain healthy cholesterol</td>
<td>67%</td>
</tr>
</tbody>
</table>
Super Jane – Almond Consumption

• However, not all Janes are created equal
• Super Jane is the sub-segment of Janes who eats almonds on a weekly basis
  – 41% of Janes, are Super Janes
• Super Jane consumes almonds 5.5 times more often than regular Jane
  – 9% of the population are “Super Janes”, and they consume 22% of the almonds
  – Regular Janes comprise 12% of the population, but eat only 4% of the almonds

<table>
<thead>
<tr>
<th></th>
<th>Super Jane (n=365)</th>
<th>Regular Jane (n=522)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of Total Population</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>Percent of Almond Consumption</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>Consumption Index</td>
<td>244</td>
<td>33</td>
</tr>
</tbody>
</table>
Attitudes about Nuts and Almonds
Almonds continue to score well in comparison to other nuts as scores increased on nearly every attribute measure.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Almonds (+2%)</th>
<th>Cashews</th>
<th>Peanuts</th>
<th>Pistachios</th>
<th>Pecans</th>
<th>Walnuts</th>
<th>Don’t Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Versatile</td>
<td>23%</td>
<td>6%</td>
<td>23%</td>
<td>4%</td>
<td>13%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Healthy</td>
<td>50% (+4%)</td>
<td>7%</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Indulgent</td>
<td>11% (+3%)</td>
<td>33%</td>
<td>7%</td>
<td>21%</td>
<td>13%</td>
<td>5%</td>
<td>11%</td>
</tr>
<tr>
<td>Balanced</td>
<td>33% (+4%)</td>
<td>9%</td>
<td>10%</td>
<td>6%</td>
<td>7%</td>
<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td>Fresh</td>
<td>20% (+2%)</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>Energetic</td>
<td>26% (+4%)</td>
<td>9%</td>
<td>17%</td>
<td>9%</td>
<td>6%</td>
<td>9%</td>
<td>24%</td>
</tr>
<tr>
<td>Natural</td>
<td>30% (+5%)</td>
<td>8%</td>
<td>14%</td>
<td>9%</td>
<td>7%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Best Value</td>
<td>11% (+2%)</td>
<td>5%</td>
<td>57%</td>
<td>3%</td>
<td>4%</td>
<td>7%</td>
<td>14%</td>
</tr>
<tr>
<td>Satisfying</td>
<td>22% (+2%)</td>
<td>25%</td>
<td>16%</td>
<td>11%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Sophisticated</td>
<td>17%</td>
<td>23%</td>
<td>4%</td>
<td>20%</td>
<td>15%</td>
<td>6%</td>
<td>16%</td>
</tr>
<tr>
<td>Nutritious*</td>
<td>47%</td>
<td>7%</td>
<td>8%</td>
<td>6%</td>
<td>5%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Best Tasting*</td>
<td>17%</td>
<td>35%</td>
<td>9%</td>
<td>15%</td>
<td>11%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Crunchy*</td>
<td>33%</td>
<td>11%</td>
<td>19%</td>
<td>8%</td>
<td>9%</td>
<td>12%</td>
<td>9%</td>
</tr>
</tbody>
</table>

*Added in 2010.

Q5b: Which nut is best described by each of the following…?
Almonds continue to be the top nut for reported ongoing usage, beating out peanuts for the second year in a row (61% vs. 53%)

- Canadian respondents are even more likely to select almonds compared to U.S. consumers (68% vs. 58%)

**Nut Chosen to Eat on an Ongoing Basis**

<table>
<thead>
<tr>
<th>Nut</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Almonds</td>
<td>59%</td>
<td>63%</td>
<td>61%</td>
<td>62%</td>
<td>65%</td>
</tr>
<tr>
<td>Peanuts</td>
<td>60%</td>
<td>67%</td>
<td>62%</td>
<td>53%</td>
<td>51%</td>
</tr>
<tr>
<td>Cashews</td>
<td>60%</td>
<td>56%</td>
<td>53%</td>
<td>58%</td>
<td>44%</td>
</tr>
<tr>
<td>Walnuts</td>
<td>44%</td>
<td>47%</td>
<td>47%</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>Pecans</td>
<td>43%</td>
<td>44%</td>
<td>36%</td>
<td>35%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Q10: What nuts do you choose to eat either by themselves or in other foods on an ongoing basis?
When asked what nut respondents eat most often (as a snack and/or in other foods), almonds top the list, beating out peanuts this year (29% vs. 26%)

- Canadian respondents are even more likely to report eating almonds most often compared to U.S. consumers (38% vs. 25%)
- No ABC media respondents report slightly lower scores for almonds (24% vs. 29%)

*Question added in 2009.

Q11: Which nut do you typically eat MOST often (as a snack and/or in other foods)?
Outlook on Growth
As a result of programs, consumption, awareness and perception of almonds have all dramatically increased since 2001

- Due to large increases in supply, there remains room for additional growth in the North America market

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2003</th>
<th>2005</th>
<th>2007</th>
<th>2009</th>
<th>% increase (2001-2009)</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Shipments</td>
<td>211</td>
<td>292</td>
<td>332</td>
<td>269</td>
<td>411</td>
<td>95%</td>
</tr>
<tr>
<td>US Per Cap (lbs)</td>
<td>.77</td>
<td>1.02</td>
<td>1.12</td>
<td>1.22</td>
<td>1.36</td>
<td>76%</td>
</tr>
<tr>
<td>Top of Mind Awareness</td>
<td>9%</td>
<td>12%</td>
<td>17%</td>
<td>16%</td>
<td>18%</td>
<td>100%</td>
</tr>
<tr>
<td>Overall Liking</td>
<td>7</td>
<td>7.3</td>
<td>7.5</td>
<td>7.9</td>
<td>8.0</td>
<td>14%</td>
</tr>
<tr>
<td>Health</td>
<td>6.9</td>
<td>7.5</td>
<td>8.0</td>
<td>8.4</td>
<td>8.5</td>
<td>23%</td>
</tr>
<tr>
<td>Taste</td>
<td>7.2</td>
<td>7.4</td>
<td>7.58</td>
<td>8.0</td>
<td>8.0</td>
<td>11%</td>
</tr>
<tr>
<td>Crunch</td>
<td>7.5</td>
<td>7.7</td>
<td>7.9</td>
<td>8.0</td>
<td>8.0</td>
<td>7%</td>
</tr>
<tr>
<td>Purchases/month</td>
<td>1.7</td>
<td>2.2</td>
<td>3.1</td>
<td>3.2</td>
<td>3.3</td>
<td>94%</td>
</tr>
<tr>
<td>Ongoing Usage</td>
<td>23%</td>
<td>27%</td>
<td>40%</td>
<td>63%</td>
<td>58%</td>
<td>152%</td>
</tr>
</tbody>
</table>
Results Today

Usage has increased with consistent programs

- Decrease in 2006 correlates with small crop
- Rebound in 2007 shows demand was strong

<table>
<thead>
<tr>
<th>Staring Points (2001 values)</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Marketing $</td>
</tr>
<tr>
<td>Per Cap Consumption</td>
</tr>
<tr>
<td>U.S. Shipments</td>
</tr>
<tr>
<td>Top-of-Mind Awareness</td>
</tr>
<tr>
<td>Liking (out of 10)</td>
</tr>
<tr>
<td>Health Perceptions (out of 10)</td>
</tr>
<tr>
<td>Purchases per Month</td>
</tr>
</tbody>
</table>

![Graph showing trends from 2001 to 2009](chart.png)
North American Marketing Program Overview
Communications Strategy

ABC Consumer & Health Influencer Programs

Societal Pressure:
- Government/Influencers
- Consumers
- Media

Health Innovation

Recipe Innovations

Convenience Innovation

ABC Food Professional Programs

- Fine-Dining Independents
- Upscale Chains, Family/Casual

- CPG Manufacturers
North American Investment

Budget by Target Audience

- Consumers: 67%
- Volume Drivers: 14%
- Health Professionals: 8%
- Regional Resources: 9%
- Innovators: 2%
A Handful of campaign debuted in January 2010 with four executions

• Objective of campaign is to connect with our target on a deeper emotional level and entice them to eat almonds every day
2010/11 Print Media Plan

26 print titles across 7 categories

<table>
<thead>
<tr>
<th>Food Lifestyle</th>
<th>Health</th>
<th>Women’s Service</th>
<th>Women’s Lifestyle</th>
<th>Shelter</th>
<th>Men’s Health/Lifestyle</th>
<th>Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooking Light</td>
<td>Health</td>
<td>Good Housekeeping</td>
<td>More</td>
<td>BH&amp;G</td>
<td>Men’s Health</td>
<td>Sunset</td>
</tr>
<tr>
<td>Everyday Food</td>
<td>Prevention</td>
<td>Family Circle</td>
<td>Real Simple</td>
<td>Canadian Living – C</td>
<td>Men’s Journal</td>
<td></td>
</tr>
<tr>
<td>Food Network</td>
<td>Weight Watchers</td>
<td>Woman’s Day</td>
<td>More – C</td>
<td>Coup de Pouce – C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Best Health – C</td>
<td>Chatelaine – C</td>
<td>Vita – C</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self</td>
<td>Chatelaine – C (F)</td>
<td>Oprah</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Homemakers – C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Madame – C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Overall, the *Handful* campaign average score for action taken was 19% higher than the issue norm average score.

- All ads tested significantly outscored the issue norm on actions taken, indicating that all executions have a clear call to action and consumers are responding to the message.

**Vista Actions Taken**

<table>
<thead>
<tr>
<th>Issue Norm</th>
<th>California Almonds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men's Health (Jan/Feb)</td>
<td>50%</td>
</tr>
<tr>
<td>Men's Run (Feb) Couple</td>
<td>54%</td>
</tr>
<tr>
<td>Prevention (Mar) Office</td>
<td>59%</td>
</tr>
<tr>
<td>Food Network (Mar) Couple</td>
<td>51%</td>
</tr>
<tr>
<td>Good Housekeeping (Mar) Jet Fuel</td>
<td>65%</td>
</tr>
<tr>
<td>WW (Mar/Apr)</td>
<td>53%</td>
</tr>
<tr>
<td>ESPN (May) Jet Fuel</td>
<td>56%</td>
</tr>
<tr>
<td>Good Housekeeping (June) Office</td>
<td>52%</td>
</tr>
<tr>
<td>Men's Health (June) Pro Snacker</td>
<td>56%</td>
</tr>
<tr>
<td>Men's Journal (Jun/Jul) Men's Run</td>
<td>56%</td>
</tr>
</tbody>
</table>
Online Advertising Plan

**Appetite for Life**
- allrecipes
- Cooking.com
- Food Network
- Weight Watchers

**Healthy Men**
- CBS Sports.com
- ESPN
- Weight Watchers
- Pandora
- Golf.com
27 ways to snack smarter

Why eating all day is actually good for you

Money-saving DIY projects that anyone can do

The best-fitting jeans (for as little as $40)

Streamline your morning routine: 12 beauty tips
Fiber, how do I love thee?
Let me count the ways.

THE HEALTHY COOK'S
3-STEP PANTRY PLANNER

1. Take stock now
   KNOW WHAT YOU HAVE, WHEN TO USE IT, AND WHEN TO TOSST IT.

Good for 6 months
Baking soda and baking powder: Both of these leavening agents typically last up to 6 months, but there is a way to test to see if they're still active:
   FOR BAKING SODA: mix 1 tablespoon with 2 teaspoons of vinegar.
   FOR BAKING POWDER: mix 1 teaspoon with 1/2 cup hot water. The mixtures should bubble immediately; if not, replace.

Brown rice: Because it's darker in color than white rice, brown rice is more susceptible to rancidity. Store in an airtight container for up to 6 months.

Nuts: Fostering your pantry to cool, dark, and dry. Most should be fine for 6 months stored in an airtight container. Or freeze for up to 1 year.

Oil: Times randall quickly, so keep it away from heat and light. Unopened containers last up to 6 months, once opened, use within 3 months. Buy small bottles of seldom-used oils.

Peanut butter: Store natural peanut butter, which often settle, in the refrigerator. The regular kind will be fine in your pantry up to 6 months after opening.
WOMAN'S DAY: 
One Perfect Snack - Almonds

EAT WELL EAT HEALTHY AMERICA

SALTY
10 medium black olives (like Kalamata) or 1.3-oz bag of
Glenny's Salt & Pepper Soy Crisps

SWEET
1 small whole-grain wrap (like Ezekiel 439) with 1 Tbsp Nutella spread and 1/2 cup sliced strawberries

SAVORY
1 cup red and yellow bell pepper strips with 1 Tbsp pesto dip or 1/2 cup lowfat onion dip

need an energy boost
10 honey-wheat pretzels (like Rold Gold) dipped in 2 Tbsp peanut butter

or
1 cup cherry tomatoes sprinkled with 1 oz feta cheese

6 oz lowfat vanilla yogurt with 2 Tbsp raisin-nut granola (such as Bear Naked)

or
3 whole-grain crackers (like Wise) with 1 Tbsp reduced-fat cream cheese and 2 tsp fruit preserves

or
4 pita toast rounds with 1 Tbsp light cream cheese and 1 oz smoked salmon

when in doubt...
4 cups 94% fat-free popcorn (such as Pop Secret or Newman's Own)

or
20 spicy-salted pecans

2 whole-wheat fig bars (such as Whole Grain Fig Newtons)

or
1/2 cup chocolate sorbet with 1/2 cup fresh fruit

1 Laughing Cow cheese wedge with 1/2 cup grapes

or
4 pita with 1 oz shredded mozzarella, 1 Tbsp tomato sauce and 1 tsp hummus

ONE PERFECT SNACK: ALMONDS

They're rich in protein and healthy fats, so they'll keep you satisfied, protect your heart and taste like a treat. Just limit it to a handful of unsalted almonds (about 20). Or, for automatic portion control, pick up a 100-calorie pack (like Blue Diamond or Emerald).

california almonds
AlmondBoard.com
The West at its best

The April must list
10 quick ways to make the most of our favorite season

WILDLIFE ON TWITTER
If you can’t roll out to a national park as spring serves, get updates from bobflowers, aka YosemiteBob. The veteran ranger at Yosemite National Park tweets observations (he’ll let you know when the black bears gorge on berries) and might even Twitpic a sweet rainbow. twitter.com/yosemitebob

A FRESH WAY WITH WILDFLOWERS
The new Audubon Guides wildflower app can identify more than 1,800 species—try it out in your backyard or on a hike (it beats lugging a book). We love the function that adds pics to your “like list” of flowers spotted, but there are a few kinks to work out, like a crashy scan. academy.audubon.org/apps

WASHED MINT, THIS YEAR’S MINT
Get it at Latino markets (oldexpensive) and toss it in lemonade or freeze it for pops. Just boil 1 cupp of water, 3 cups water, and 1 cup sugar. Let cool. Stir into 2 bowl, pour into molds, and freeze. Make in forms. TIME: 45 MINUTES TO 1 HOUR, PLUS FREEZING TIME

APRIL’S CHEESE PLATE Pick up spring cheeses at your nearest artisanal shop. This is the season when cows, sheep, and goats eat fresh young grasses, making cheeses taste bright. Serve are available only now, like Cowgirl Creamery’s St Pat (cowgirlcreamery.com). TIME: 45 MINUTES

GREEN ALMOND MONTH These are the healthiest nuts on the Earth world—a young almond available only from late April to early May. Serve them as a snack with olive oil and salt or toss them in salads; their herbalaceous flavors are the opposite of the nuts, naturally sweet. Look for them at farmers’ markets or specialty stores online. TIME: 30 MINUTES

CLASSIC SWEET PEA, MODERN TWIST
Make a fragrant single-flower bouquet using deep purple sweet peas instead of red or white. TIME: 10 MINUTES
Woman's Day: Almonds as a Healthy Solution

No time to eat healthy? No problem! Here’s how to get slim on a hectic schedule

Dr. Pierre's California Veggie Burgers
Dinner-O-Turkey Burgers
Health Is Wealth Chicken Patties
Kash-Red Curry Chicken
Appetite-Fighting Spinach & Feta Sausage
Frozen precooked, peeled and cleansed tail-off shrimp (like Chicken of the Sea)
4 oz single-serving tuna packets
Canal Crabcake (Black, kidney, camembert) and/or chicken
Cheese-Stuffed Roasted Vegetable Pizza
Dressed rotisserie chicken (pick one up on your way home from work)
Van's Organic Flax Waffles
Food for Life Ezekiel 4:9 Cinnamon Raisin English Muffins
Whole-grain sliced bread
Precoked whole wheat pans, like Fatman 100% Whole Wheat English Muffin
Amy's Dishashell Scramble: Spag.
Amy's Roasted Vegetables Lasagna
Amy's Light in Sodium Brown Rice & Multigrain Bowl
Uncle Ben's Ready Rice Whole Grain Brown (cooks in 90 seconds)
Near East Whole Grain Blends Wheat Couscous

HEALTHY FAST-FOOD PICKS
Sometimes the fastest option really is healthiest. Don't net out it is either more than once or twice a week. Smart choices to help you make the best of it.

Taco Bell
2 Fresco Soft Tacos (Mielan Chicken, 440 cal, 5 fat)
2 Soft Shells, 280 cal, 5 fat
Burrito with Guacamole, 370 cal, 11 fat

EPC
Grilled chicken breast with mashed potatoes and green beans, 400 cal, 5 fat
Grilled Chicken BLT Salad with Light dressing, 230 cal, 5 fat

HCDONALDS
Hamburger with small salad, 400 cal, 5 fat
Premium Southwest Salad with Newman's Own dressing, 300 cal, 5 fat

DINNER
Heal 2 tsp peanut oil in a skillet, add 1 cup precooked brown rice, minced garlic, 1/2 tsp minced fresh (or julienned) ginger and 1 tsp low sodium soy sauce. Cook 5 minutes longer. Top with 2 tsp chopped peanuts.

SNACKS
1 apple with 1 tsp all-natural peanut butter, 1/2 sliced banana, 1/2 cup frozen strawberries

THE GET-REAL BASICS
Eat 3 meals and 2-3 snacks every day.
Choose fresh foods over canned items when possible.
Keep a food diary.
Make toothbrush if you shower it at one meal downsize the next (but no meal skipping).
Avoid for about 1,500 to 1,700 calories a day (to lose 10-20 pounds a week).

THE GET-REAL BASICS
Eat mostly healthy fats.
Choose fresh foods over canned items when possible.
Keep a food diary.
Make toothbrush if you shower it at one meal downsize the next (but no meal skipping).
Avoid for about 1,500 to 1,700 calories a day (to lose 10-20 pounds a week).
Better Homes and Gardens: Almonds: Heart-Friendly Foods

The harsh reality: Heart disease is the No. 1 killer of women. The heartening truth: It’s almost entirely preventable. Here’s what you can do to reduce your risk—starting today.

By DIANA A. AMES, R.D., and MARJORIE C. HILL, M.D.

They call heart disease the silent killer for a reason.

“Life is challenging to prevent because you don’t feel it,” says Dr. Elizabeth Blau, a spokesperson for the American Heart Association.

The silent killer, heart disease, is the leading cause of death in the United States. Each year, it claims more lives than all forms of cancer combined.

Yet, if you have a contraindication or genetic predisposition to cardiovascular disease, the good news is that you can control your heart health. You can dramatically lower your risk—by 80 percent—by making diet, exercise, and lifestyle changes. On the following pages, nutrition experts, doctors and scientists offer proven strategies to keep heart disease at bay.

Almonds: Heart-Friendly Foods

- **Grape Juice**: Grape juice is rich in antioxidants, which help reduce the risk of heart disease. It also contains resveratrol, a compound that has been shown to improve heart health.

- **Grass-Fed Beef**: Grass-fed beef is rich in heart-healthy omega-3 fatty acids, which can help reduce the risk of heart disease.

- **Berries**: Berries are rich in antioxidants and have been shown to reduce the risk of heart disease.

- **Almonds**: Almonds are rich in heart-healthy fats and are a good source of vitamin E, which is important for heart health.

- **Soybeans**: Soybeans are a good source of heart-healthy fats and are a good source of protein.

- **Salmon**: Salmon is a rich source of heart-healthy omega-3 fatty acids, which can help reduce the risk of heart disease.

- **Spinach**: Spinach is a good source of heart-healthy antioxidants and can help reduce the risk of heart disease.

- **Cucumbers**: Cucumbers are a good source of heart-healthy antioxidants and can help reduce the risk of heart disease.

- **Oatmeal**: Oatmeal is a good source of heart-healthy fiber and can help reduce the risk of heart disease.

- **Organic Flax Seed**: Organic flax seed is a good source of heart-healthy omega-3 fatty acids, which can help reduce the risk of heart disease.
Thank You
Targeting the EU Consumer Snack Opportunity
Dariela Roffe-Rackind, Almond Board of California
European Overview

European Context

European research investment

Current Almond Usage Assessment

European Market NEW Consumer
  • *How the market is changing?*
  • *Who is the almond consumer?*

Almond Board European Marketing Program Overview
  • *How we are reaching changing consumers*
The European Market

1. Programs traditionally focused on UK, France & Germany
   • 3 largest European populations (42% of total EU population)
   • Largest retail food spenders (46% of total EU retail food spend)
   • Top 3 European markets for new almond product introductions


3. Concentration of global/multinational food manufacturers in EU
   • Traditionally an ingredient market
   • Europe continues to introduce more almond products than any other region
   • Europe is a major trend driver for the rest of the world especially in chocolate/confectionery
   • Highest value bakery market in the world
   • Snack market is largely undeveloped
## EU Research

<table>
<thead>
<tr>
<th>Year</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>In-depth consumer assessment study in Europe to identify common beliefs, values, attitudes and opportunities to reach EU target consumer (Jane) across the region (secondary research + focus groups)</td>
</tr>
<tr>
<td>2009/10</td>
<td>Global New Products Report</td>
</tr>
<tr>
<td>January 2010</td>
<td>Consumer Attitudes, Awareness &amp; Usage study (France, Germany, UK, Poland)</td>
</tr>
<tr>
<td>January 2010</td>
<td>Health Professional survey in France, Germany, Poland and the UK</td>
</tr>
<tr>
<td>September 2010</td>
<td>Packaged Foods Professionals Attitudes, Awareness &amp; Usage study</td>
</tr>
<tr>
<td>August 2010</td>
<td>Analysis of retail sales data from the UK, France and German packaged snack nut market</td>
</tr>
<tr>
<td>November 2010</td>
<td>Snacking global market assessment</td>
</tr>
<tr>
<td>December 2010</td>
<td>Qualitative Study of 1800 consumers in France, UK and Germany to better understand consumer motivations and considerations when choosing a snack</td>
</tr>
</tbody>
</table>
Current Almond Usage Assessment
In August 2010, an assessment was completed to analyze the retail sales data from the UK, France and German packaged snack nut market

- The category is defined as: *Usually processed by either cooking in oil or dry roasting, but raw de-shelled nuts sold as snacks are also included. Products often come pre-salted and are packed in tins, cartons and foil or plastic laminated pouches. Includes peanuts, cashews, mixed nuts and a variety of specialized products, including almonds and pistachios. Note: Fruit and nut mixes or trail mixes and nuts used for cooking/baking are excluded.*

In addition, an analysis was done to evaluate the chocolate confectionary and cereal categories in the UK
Almond Share: IRI Analysis

Almond products (including mixed nuts) account for 12%-18% of the snack nut market across the EU3

- “Pure” almond products (i.e. almond-only products) are just 2% of snack nut volume sales in the U.K.

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Total Snack Nuts</td>
<td>210</td>
<td>373</td>
<td>90</td>
<td>92</td>
<td>181</td>
</tr>
<tr>
<td>Almond Products (including mixes and “pure” products)</td>
<td>34</td>
<td>111</td>
<td>11</td>
<td>16</td>
<td>23</td>
</tr>
<tr>
<td>“Pure” Almond Products Only</td>
<td>5.7</td>
<td>55</td>
<td>2.0</td>
<td>3.3</td>
<td>13.6</td>
</tr>
<tr>
<td>Almond Product Share (including mixes and “pure” products)</td>
<td><strong>16%</strong></td>
<td><strong>30%</strong></td>
<td>13%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>Pure Almond Share</td>
<td>3%</td>
<td>15%</td>
<td><strong>2%</strong></td>
<td>4%</td>
<td>8%</td>
</tr>
</tbody>
</table>
Peanuts are especially dominant among snack nuts in the U.K.

- Pistachios have a significantly larger share in France
The U.K. is a relatively strong snacking market, but almonds are currently underrepresented

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</tr>
</thead>
<tbody>
<tr>
<td>Packaged Snack Volume (millions of lbs.)</td>
<td>7,196</td>
<td>7,891</td>
<td>1,009</td>
<td>365</td>
<td>552</td>
<td>552</td>
</tr>
<tr>
<td>Packaged Snacks Per Capita (lbs.)</td>
<td>35.3</td>
<td>35.2</td>
<td>20.2</td>
<td>7.3</td>
<td>8.5</td>
<td>8.5</td>
</tr>
<tr>
<td>Snack Nut Volume (millions of lbs.)</td>
<td>495</td>
<td>739</td>
<td>110</td>
<td>101</td>
<td>70</td>
<td>181</td>
</tr>
<tr>
<td>Snack Nuts Per Capita (lbs.)</td>
<td>2.43</td>
<td>3.30</td>
<td>2.19</td>
<td>2.02</td>
<td>1.08</td>
<td>2.78</td>
</tr>
<tr>
<td>Snack Nut Share of Packaged Snacks</td>
<td>7%</td>
<td>9%</td>
<td>11%</td>
<td>28%</td>
<td>13%</td>
<td>33%</td>
</tr>
<tr>
<td>Almond Snack Nut Volume (millions of lbs.)</td>
<td>22</td>
<td>122</td>
<td>3.8</td>
<td>5.3</td>
<td>5.7</td>
<td>15</td>
</tr>
<tr>
<td>Almond Snack Per Capita (lbs.)</td>
<td>0.11</td>
<td>0.55</td>
<td>0.08</td>
<td>0.11</td>
<td>0.09</td>
<td>0.23</td>
</tr>
<tr>
<td>Almond Share of Snack Nuts</td>
<td>4%</td>
<td>17%</td>
<td>3%</td>
<td>5%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Almond Share of Packaged Snacks</td>
<td>0.3%</td>
<td>1.6%</td>
<td>0.4%</td>
<td>1.5%</td>
<td>1.0%</td>
<td>2.7%</td>
</tr>
</tbody>
</table>
Nearly one-fourth of all packaged food sales in Western Europe are private label products.

The more consolidated the grocery channel, the stronger the penetration of private label.

- For example, due to greater fragmentation in grocery, Italy is not as strong in private label.

Source: Euromonitor.
Private label is especially important in packaged snack nuts – more so than for other almond ingredient categories

- Private label accounts for nearly one third of packaged snack nuts sales in Western Europe

![Private Label Share of Packaged Foods Sales 2008](image)

Source: Euromonitor.
UK market significantly behind its European counterparts and the UK, reporting 0.4%, as compared to France’s 1.5% and Germany’s 1.0% (US at 1.6%)

The UK packaged snack volume is the largest of the EU3
• More than 2.5x larger than France
• Nearly 2x larger than Germany

UK has the largest packaged snack market, yet the lowest snack nuts per capita, almond snack consumption per capita, almond share of snack nuts and almonds share of packaged snacks
• Indicates greatest fastest potential within existing snack category is in the UK
• Private label accounts for nearly one third of packaged snack nuts sales in Western Europe
European Market NEW
Consumer
Europeans, especially women, are feeling time pressured—even in the stereotypically laid-back Southern markets

- The number of women who work is increasing

“It is difficult to manage my daily obligations and find time to relax” (% agree)

European Market Consumers: Lifestyle Shifts

Despite strong cooking traditions in many markets, the use of ready meals is widespread and growing.

*Ready Meals = the aggregation of canned/preserved, frozen, dried, chilled ready meals, dinner mixes, frozen pizza, chilled pizza and prepared salads. Note: Ready meals are products that have had recipe "skills" added to them by the manufacturer, resulting in a high degree of readiness, completion and convenience.

Source: Euromonitor market statistics.
Lifestyle changes have led to a decline in traditional meal times and formal dining occasions

As a result, Europeans are snacking regularly

- While snacking was not historically part of the culture for many European markets, busier lifestyles have impacted the way people eat throughout Europe
- On average, Europeans snack only about 1.5 times per week less than Americans

<table>
<thead>
<tr>
<th>Market</th>
<th>Average # of Snacks per Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</td>
<td>14.4</td>
</tr>
<tr>
<td>Netherlands</td>
<td>14.3</td>
</tr>
<tr>
<td>Spain</td>
<td>13.6</td>
</tr>
<tr>
<td>Italy</td>
<td>13.5</td>
</tr>
<tr>
<td>Germany</td>
<td>13.2</td>
</tr>
<tr>
<td>Sweden</td>
<td>12.8</td>
</tr>
<tr>
<td>France</td>
<td>12.7</td>
</tr>
<tr>
<td>TOTAL Europe</td>
<td>13.4</td>
</tr>
<tr>
<td>U.S.</td>
<td>15.0</td>
</tr>
</tbody>
</table>

Source: Datamonitor; IGD Consumer Research, 2005.
• European Jane easily classifies snacks as either good or bad but wants both in her diet
• Nuts, with the exception of peanuts, are seen as good snacks
Due to recent economic concerns, consumers are reprioritizing where they spend their money. This had led to the emergence of two seemingly conflicting trends in food:

- Consumers are growing more value conscious
  - However, this does not mean always choosing cheaper alternatives
- Consumer are trading up in some categories
  - Occurring in more emotionally meaningful categories (e.g., chocolate)
  - “People are still looking for a little joy in their lives.” – Manufacturer

The same consumers are trading up and trading down in different categories

- 64% of Tesco shoppers in the UK are buying from both the low-end and high-end private label lines

<table>
<thead>
<tr>
<th>Market</th>
<th>% Chosen Groceries on the Basis of Value*</th>
<th>% Trading up to Higher Priced Item*</th>
<th>% of HH Doing Both</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>29%</td>
<td>34%</td>
<td>36%</td>
</tr>
<tr>
<td>Germany</td>
<td>33%</td>
<td>30%</td>
<td>34%</td>
</tr>
<tr>
<td>Italy</td>
<td>34%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>43%</td>
<td>24%</td>
<td>29%</td>
</tr>
<tr>
<td>Spain</td>
<td>28%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>Sweden</td>
<td>29%</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>UK</td>
<td>38%</td>
<td>37%</td>
<td>25%</td>
</tr>
<tr>
<td>U.S.</td>
<td>42%</td>
<td>28%</td>
<td>23%</td>
</tr>
</tbody>
</table>

*% reporting doing this more vs. YAG.

Source: Euromonitor, Datamonitor.
Obesity on the rise

- Working longer hours, exercising less, less time to prepare meals, eating on the go = getting fat!
- France and Italy are still considerably less obese, but obesity is growing

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Adults Who are Obese - 2008</th>
<th>% growth ’03 to ’08</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>40</td>
<td>25%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>24</td>
<td>5%</td>
</tr>
<tr>
<td>Hungary</td>
<td>20</td>
<td>5%</td>
</tr>
<tr>
<td>Poland</td>
<td>19</td>
<td>15%</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>17</td>
<td>10%</td>
</tr>
<tr>
<td>Germany</td>
<td>15</td>
<td>14%</td>
</tr>
<tr>
<td>Spain</td>
<td>14</td>
<td>10%</td>
</tr>
<tr>
<td>France</td>
<td>10</td>
<td>9%</td>
</tr>
<tr>
<td>Italy</td>
<td>10</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: Euromonitor
European Market Consumers: Health Concerns

Health concerns are impacting the way Europeans shop and eat

- Healthy eating is relevant across age groups

Percentage of Respondents Doing this More vs. Previous Year

**Used Nutritional Information on Product Packaging to Help Make Food and Drink Choices**

- UK: 60%
- U.S.: 58%
- Spain: 57%
- Italy: 54%
- Sweden: 46%
- Netherlands: 42%
- France: 42%
- Germany: 30%

**Taken Active Steps to Eat Healthier**

- 65+: 70%
- 50-64: 67%
- 35-49: 63%
- 25-34: 66%
- 18-24: 64%

Source: Datamonitor
The number of new “healthy” food and beverage introductions in Europe have increased over ten-fold since 2002.

“Healthy” Food and Beverage Introductions in Europe (# of SKUs)

Source: Datamonitor, keyword search of new food and non-alcoholic beverages for “healthy.”
Attitudes about Nuts and Almonds
Nuts: Pros and Cons

- Significant positive associations with nuts, but one consistent caveat

Nuts are healthy, **BUT not too many!**

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tasty</td>
<td>Cause weight gain if eat too many, fattening</td>
</tr>
<tr>
<td>Natural</td>
<td></td>
</tr>
<tr>
<td>Good fats, healthy oils</td>
<td></td>
</tr>
<tr>
<td>Fun, social</td>
<td></td>
</tr>
<tr>
<td>Easy, convenient, portable</td>
<td></td>
</tr>
<tr>
<td>Pantry staple</td>
<td></td>
</tr>
<tr>
<td>Familiar</td>
<td></td>
</tr>
<tr>
<td>Energy booster</td>
<td></td>
</tr>
<tr>
<td>Nutrient rich</td>
<td></td>
</tr>
<tr>
<td>Satiety</td>
<td></td>
</tr>
<tr>
<td>Usage versatility</td>
<td></td>
</tr>
<tr>
<td>Cultural relevance</td>
<td></td>
</tr>
</tbody>
</table>
Nuts: Personalities

Though difficult, respondents were able to identify nut “personas” when pushed

There were consistencies in perceptions of the individual nuts across markets

<table>
<thead>
<tr>
<th>Peanut</th>
<th>Walnut</th>
<th>Hazelnut</th>
<th>Cashew</th>
<th>Pistachio</th>
<th>Almond</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Nothing special.”</td>
<td>“She’s lived a long life, so she must be healthy.”</td>
<td>“Older and not very fashionable.”</td>
<td>“They are high in fat. I would eat them in place of a meal.”</td>
<td>“Something to eat with my beer or martini.”</td>
<td>“Almonds are included in all diets, so they must be best.”</td>
</tr>
<tr>
<td>“I think of sports, and Americans.”</td>
<td>“A lot of good oils.”</td>
<td>“When I see a dessert with hazelnuts, I think of my father.”</td>
<td>“Cashews are trendy and high class.”</td>
<td>“I think of men and watching sports.”</td>
<td>“My favorite.”</td>
</tr>
<tr>
<td></td>
<td>“They looked wrinkled.”</td>
<td>“I think they are a little old-fashioned and traditional.”</td>
<td>“Indulgent and pleasurable.”</td>
<td>“People like to eat them at parties.”</td>
<td>“I know almond oil is good for you.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td>“Healthy and come in my cereal.”</td>
<td></td>
<td></td>
<td>“She looks approachable and sophisticated.”</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>“Almond oil is in a lot of hair and skin products.”</td>
</tr>
</tbody>
</table>
Almonds have a varied heritage across Europe

- Holidays
- Baked goods
- Marzipan
- Snacking
- Almond trees
- Family
Almonds: Current Uses and Perceptions

• Despite low top-of-mind awareness, there are strong, inherent equities:
  
  Beauty
  • Association with beauty products (skin and hair)
  Healthiest nut
  • Least oily

There are no negative perceptions of almonds specifically
• Taste perceptions are positive

Almonds are currently a pantry staple
• Familiar with (and using) a variety of almond forms
The more general lifestyle-related almond messages were both most important and most believable.

Specific health attributes scored lower on both measures.
Almonds: Almond Messaging

- Almonds become truly newsworthy, compelling, and relevant when positioned as a healthy, convenient snack.

- For many, this simple frame of reference change (from an ingredient for baking and holidays to a snack) fundamentally changes how they think of almonds.
Almonds: Almond Messaging

• The almond tin immediately expresses the power of almonds as a snack and a lifestyle food choice

Seeing the tin instantly changed how respondents thought about almonds
• Great solution for on-the-go snacking
• Quick energy boost
• Something I want with me
• Fun
• Stylish
• Contemporary
• New

The tin captures and brings to life the essence of almonds in a visual and physical way
Conclusions

Europe has the potential for **significant growth!**

The potential for growth can be driven by:

- A common target audience with:
  - Common needs
  - Beliefs
  - Situations
  - Values
- Almonds are part of European culture and heritage
- Consumers like the taste of almonds—no significant barriers!
- Almonds are available in-store and in-pantry
- Positioning almonds as a healthy snack meets a major consumer need and aligns with powerful change forces
  - Convenience
  - Desire for simple, natural foods
  - Resistance to more processed, convenient solutions
  - Positioning almonds as a snack makes them more relevant and contemporary
European Marketing Program Overview
From these trends, as well as in-depth primary research, we have been able to redefine who our target is and how to reach her.

Who

European women, 35+, health and food involved*

What

• Currently almonds have Low awareness and relevancy
  • Almonds have important embedded equities that we can build from and own
  • Opportunity to position almonds as a snack to increase relevancy

How

• UK:
  • Integrated Consumer Public Relations, Advertising program
  • Outreach to Food Professionals and Health Professionals

• France and Germany:
  • Integrated consumer Public Relations program
  • Outreach to Food Professionals and Health Professionals

# in UK: 9.9 M (22% of UK adult pop.; 41% of women)
# in France: 6.2 M (10% of France adult pop.; 19% of women)
# in Germany: 8.8 M (20% of adult German pop.; 38% of women)

*Physiographic attitude statements were used to determine health and food involvement
Communication Approach

- Consumers
  - Consumer healthy snacking program
  - 75%

- Influencer Audience
  - Nutritionists/Dieticians
  - Leverage key pan-European health influencers to increase health halo
  - 7%

- Manufacturer/Retailers
  - Support and leverage ingredient market in key categories: Chocolate, Bakery, and Snacking
  - 17%

- Market-by-Market (France, Germany, UK)
  - Reach across EU markets

- Print & online advertising (UK only) supported by PR campaign
- Celebrity spokesperson program
- Paid for media partnerships
- Active ongoing press Office
- E-Newsletter
- Snacking research
- Dietician/Nutri. Outreach
- Advisory Board
- E-Newsletter
- Health Claim
- European Congress on Obesity

- Press Office
- Innova partnership
- E-Newsletter
- FiE Planning
- Collateral development
- Food Professional advertising
Total European Budget CY 2010-11 = $4,286,600

Budget by Target Audience:
- Consumers: 75%
- Food Professionals: 18%
- Health Professionals: 7%

Budget by Market:
- UK: 55% (46% consumer advertising)
- Europe: 12%
- Germany: 16%
- France: 17%
New UK consumer advertising campaign: January 2011

Launch making snack almonds part of everyday life

Every girl needs her basics.
An umbrella is smart. Keys are critical. And while lip gloss is handy, none of these can save you from hunger. Only a tasty, crunchy handful of almonds has what it takes to tame those empty grumbling. Compared to other nuts, almonds are the highest source of 6 essential nutrients including protein and fibre*. Just what you need to get through even the most grueling day.
Learn more about almonds, the on-the-go essential, at AlmondsBoard.co.uk

Gym bag must-haves.
The right snack is part of every great workout. So work in a handful of almonds. Their deliciously healthy crunch packs a higher source of 6 essential nutrients than any other nut. And with a powerful protein punch, they’re just what you need to keep going strong all day long.
Learn more about almonds, the on-the-go essential, at AlmondsBoard.co.uk

*Compared to other tree nuts, green per gram, almonds are the highest source of protein, fibre, vitamin E, phosphorus, copper, and magnesium.
© 2011 Almond Board of California. All rights reserved.
Every girl needs her basics.

Armed and ready.

Success is in the bag.

New UK consumer advertising campaign: January 2011
## FY 10-11 UK Consumer Media Flowchart

<table>
<thead>
<tr>
<th>UK Consumer</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
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<td>Woman &amp; Home</td>
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<td>Good Housekeeping</td>
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<td>All About You</td>
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<td>BBC Good Food.com</td>
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</table>
UK Advertising Supported by PR

- Competitions
  - News & features
    - Consumer surveys
    - Press materials
  - Expert Spokespeople
  - Celebrity Goody Bag Seeding
  - Brand Partnership
  - Media Partnerships
  - Retailer Engagement

- Media Partnerships
  - woman&home
  - handbag.com
  - iVillage
  - EasyLiving
  - allaboutyou
  - heart 100.7
  - SHE
  - Sainsbury’s
  - Tesco
  - M&S
  - Waitrose
Ongoing PR Programs in France & Germany (the highlights)

- Ongoing press office to generate media coverage
- Partnership with personal trainer Julie Ferrez
- Sponsorship of La Parisienne, the biggest women only mass-participation run in France.
- Partnership with AuFemin.com, the most important lifestyle website reaching 10 million French Janes – dedicated almond microsite

- Ongoing press office to generate media coverage
- Online advertorials
- Broadcast (radio) press kit (Broadcast via 25-30 radio stations)
- Direct outreach to publishing houses
- Brand partnerships
AlmondBoard.com in German, French and UK English
Eat, Pray, Love Almonds in India

Becky Sereno, Almond Board of California
India Overview

India’s Consumers...

...Love Almonds

Almond Board India Marketing Program Overview
India by the Numbers

One fast growing market

• GDP Growth
  2007: 7.4%
  2008: 7.4%
  2009: 9%

• Per Capita GDP
  2007: $2,800
  2008: $3,000
  2009: $3,200

Source: CIA World Fact Book, 2009
India is a large, diverse and fragmented market

Multiple religious and ethnic groups

22 languages

28 states

1,200 dialects

Economic disparity

Diverse Culture, Customs, Cuisine
Almond Exports to India

- California Almond exports over the past couple years have increased leaps and bounds
- End of FY 09/10 India was the 4th largest export market for California Almonds

Source: Almond Board of California Position Reports
India’s Consumers...
Young People are a Driving Force

700 million Indians are under age 35

550 million are under age 25

Over 25 million newborns per year

Influencers – peer group and workmates

Spending power – $175–$1,000 per month

Consumption areas – food and clothing

Source: Mindshare-Media Buying Agency research for MTV
Large and Increasing Middle Class

- Working women contributing to larger workforce and more spending power for the family
- Western-style shopping centers, cafés, and fast food are cropping up all over urban centers

50 million (5% of population)

583 million (41% of population)

$2,875

$8,000

$370 billion

>$1,500 billion

# Large and Increasing Middle Class

## The expanding middle

<table>
<thead>
<tr>
<th>Category</th>
<th>Middle class (xx.x)</th>
<th>Number of households, millions</th>
<th>Aggregate disposable income by annual income bracket, trillion Indian rupees</th>
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</thead>
<tbody>
<tr>
<td>Global</td>
<td>2.0 (1.2)</td>
<td>6.3 (3.3)</td>
<td>21.7 (9.5)</td>
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<tr>
<td>Striver</td>
<td>1.6 (2.4)</td>
<td>3.8 (5.5)</td>
<td>20.9 (33.1)</td>
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<tr>
<td>Seeker</td>
<td>3.1 (10.9)</td>
<td>15.2 (55.1)</td>
<td>30.6 (94.9)</td>
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<tr>
<td>Aspirer</td>
<td>11.4 (91.3)</td>
<td>14.6 (106.0)</td>
<td>13.7 (93.1)</td>
</tr>
<tr>
<td>Deprived</td>
<td>5.4 (101.1)</td>
<td>3.8 (74.1)</td>
<td>2.6 (49.9)</td>
</tr>
</tbody>
</table>

Indian population facing health issues like CVD, obesity, type 2 diabetes

- Number of diabetic patients in India more than doubled from 19 million in 1995 to 40.9 million in 2007
- Projected to increase to 69.9 million by 2025
- Currently, up to 11 percent of India’s urban population and 3 percent of rural population above the age of 15 have diabetes

Source: International Diabetes Foundation, 2007
Primary Target Consumer

Meet Neha!

- Women, 30 – 40 years old, SEC A and B, university educated, from metro cities – Delhi/Mumbai/Bangalore

- Lifestyle conscious, sophisticated consumer, manager of household income
A common set of *lifestyle* pressures and responsibilities

- Juggling home, children, elders, servants, sometimes career
- Keeping up with neighbors and peers

Her *role* as the woman of the house, who guides food purchasing and preparation as well as child rearing

- Empowered to make healthy choices

Common *values and attitudes*

- Will do anything for her children
- Balancing traditions and modern life
...Love Almonds
Consumer Research Investment

Qualitative:
• 18 Focus Groups:
  • Mother & Youngsters (19 – 23 years old)
• 6 Family Sessions with Grannies
• Conducted across 6 major cities

Quantitative:
• Females and Males
• In-person, at-home interviews
• Conducted across 12 major cities

Field Work Conducted: May – June 2008
Nuts or Dry Fruits?

Nuts

- Chironjee (Charoli?)
- Neze (Pine Nuts)
- Pistachio
- Akrot (Walnut)
- Khopra (Dried coconut)
- Anjeer (Dried Figs)
- Makhana (Lotus seeds, puffed)
- Watermelon seeds
- Aam Satta (Dried mango)
- Groundnut/Peanuts

Dry Fruits

- Dates
- Munakka (Sultana?)
- Kishmish (Raisins)
- Anjeer (Dried Figs)
- Khumani (Dried Apricots)
- Akrot (Walnut)
- Neze (Pine Nuts)
- Pistachio

Source: IMRB, 2007; Female consumers only
Dry fruits as a category seen to be health giving… as being ‘good for you’

Only nuts branch off into specific health benefits… the other still operate in the generalist sphere

Source: IMRB, 2007; Female consumers only
Perceptually plotting Almonds: taste vs specific health benefits

High on taste

Cashew

Pistachio

Peanuts

Low on taste

Specific benefits

Overall Fortification

Source: IMRB, 2007; Female consumers only
Almond Findings at a Glance

• Almonds are the *first* dried fruit women think of on a country-level basis

• Almonds are rated as the *favorite* dried fruit by 47% of women consumers in India, the number one answer

• Almonds are also rated by 64% of women surveyed as the *most healthy* dried fruit, again, the number one answer

Source: IMRB, 2007; Female consumers only
36% of female consumers reported they have consumed more almonds in the past year.

Source: IMRB, 2007; Female consumers only
88% of female consumers report they prefer a product containing almonds over a similar product without almonds.

40% report they will increase their purchases of almonds in the next 12 months.

Source: IMRB, 2007; Female consumers only
Still room for growth

While almonds are popular and products are present, there is opportunity to more strongly associate almonds with snacking in the daily diet and provide a compelling reasons to seek them out every day, throughout the year.
Almond Board India
Marketing Program Overview
### Strategic Approach to Reach Nehas

<table>
<thead>
<tr>
<th>Objective</th>
<th>Desired Behavior</th>
<th>Communications Strategy</th>
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<tbody>
<tr>
<td>• Increase consumption frequency of California Almonds</td>
<td>• Incorporate greater and more regular consumption of almonds into her and her family’s daily life beyond just certain occasions and seasons.</td>
<td>• Build upon existing traditions of consumption while providing new reasons to enjoy almonds for the good life as part of today’s contemporary lifestyle</td>
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<td>• Appeal to emotions and aspiration of living a full, healthy, good quality life</td>
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</table>
Holistic Consumer Campaign Around Celebrity Ambassador

- **Print Advertising and Advertorials**
- **Press Office**
- **Pos Materials**
- **Marketing Events and Partnerships**
Print Advertorials

Fun, Family and Almonds for Winter
Winners and almonds make a perfect combination for Karima Kapoor

Nutrient-Rich Almonds

Benefits of the winter months! You must try to eat almonds in the winter because they are very good for you and can help you lose weight and keep you healthy. Almonds are a perfect combination of protein and fat, which can help you to maintain a healthy weight. They are also a good source of fiber, which can help to keep you feeling full and satisfied.

One Woman, Many Roles

There are many reasons why a woman should eat almonds, as well as smiling through all of these challenges, they are perfect for the body and for the mind. Almonds are a perfect combination of protein and fat, which can help to keep you feeling full and satisfied.

Smart snacks

Almonds are a perfect combination of protein and fat, which can help to keep you feeling full and satisfied. They are also a good source of fiber, which can help to keep you feeling full and satisfied. They are also a good source of calcium, which can help to keep your bones strong.

Meaning of health

Almonds are a perfect combination of protein and fat, which can help to keep you feeling full and satisfied. They are also a good source of fiber, which can help to keep you feeling full and satisfied. They are also a good source of calcium, which can help to keep your bones strong.

All-time favorite almonds

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Fun challenge

I am a foodie and I love challenges, and this is a great one. I have to eat almonds every day for a week, and I have to eat them at different times of the day to see if I can keep them as a snack. It’s a great challenge.

Almonds. A handful of goodness

Basil-Pesto Almonds

Ingredients

2 medium-sized Arborio almonds
1 teaspoon garlic powder
Preparation

1. Preheat oven to 350°F. 2. In a large mixing bowl, combine the almonds, basil, and garlic powder.

Almonds: The Delicious Way To A Healthy Life

From the moment we get up, the almonds are on our mind. Whether we are working or not, we need them. Almonds are a perfect combination of protein and fat, which can help to keep you feeling full and satisfied. They are also a good source of fiber, which can help to keep you feeling full and satisfied. They are also a good source of calcium, which can help to keep your bones strong.

Almonds may help protect against lifestyle diseases

California almonds are cholesterol-free and low in saturated fat, making them a perfect choice for heart-healthy meals and snacks. Research now showing that they may also help maintain a healthy heart with healthy cholesterol levels. Almonds may help reduce LDL or "bad" cholesterol and increase the HDL or "good" cholesterol as part of a diet low in saturated fat.

So don’t waste your time on low-calorie snacks, simply go for almonds. Almonds are a perfect combination of protein and fat, which can help to keep you feeling full and satisfied. They are also a good source of fiber, which can help to keep you feeling full and satisfied. They are also a good source of calcium, which can help to keep your bones strong.

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Featured in popular women’s magazines: Cosmopolitan, Good Housekeeping, Meri Saheli, Women’s Era, Reader’s Digest, and widely distributed newspapers: Mid Day, Times of India, Hindustan Times
Print and Television Advertising

3 TV spots to showcase gifting leading up to and during Diwali and general festival/winter consumption post-Diwali
Thank You
Wrap-Up, Discussion and Q&A
Growers:
Win a New Holland Rustler from Garton Tractor and SmartCube Packaging System. Complete your entry form and return to booth #81 or #82.
Next Session at 9:50 am:

Modern Rootstocks for Almonds by Progressive Genetic Group

Grand Ballroom

Moderated by Richard Waycott
Lunch Sponsor

syngenta
Sessions at 1:30 pm

Leveraging Consumer Demand to Become an Essential Ingredient in Arbor Theater

Pollination Updates in Grand Ballroom