



## SUPER-POWERING ALMONDS' GLOBAL FUTURE

Moderator: Brian Ezell (The Wonderful Company)
Speakers: Emily Fleischmann (ABC),
Laurel Muir (Sterling-Rice Group),
Heather Trail (The Disney Company),
Daniel Cruz (The Disney Company)



**Almond Board of California** 



THE ALMOND CONFERENCE | DECEMBER 2021



# The World Has Turned



Upside Down



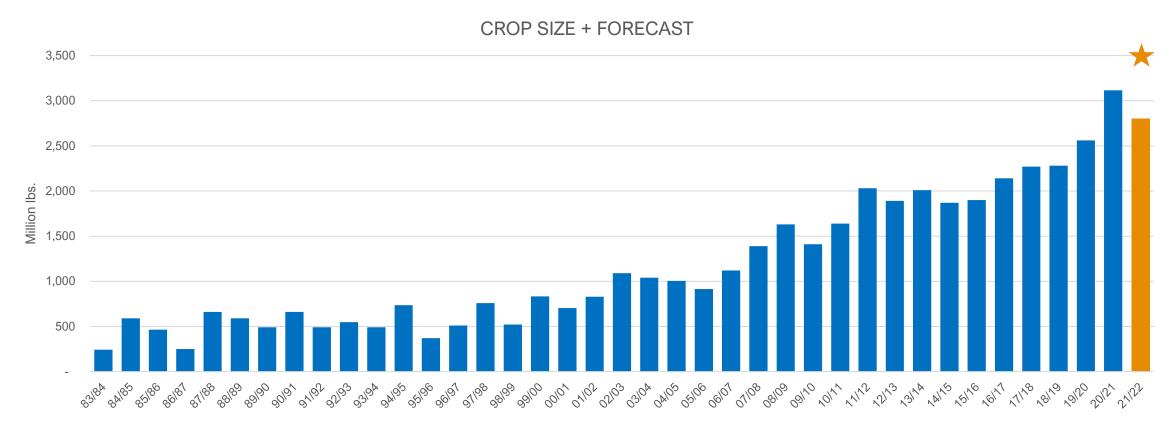






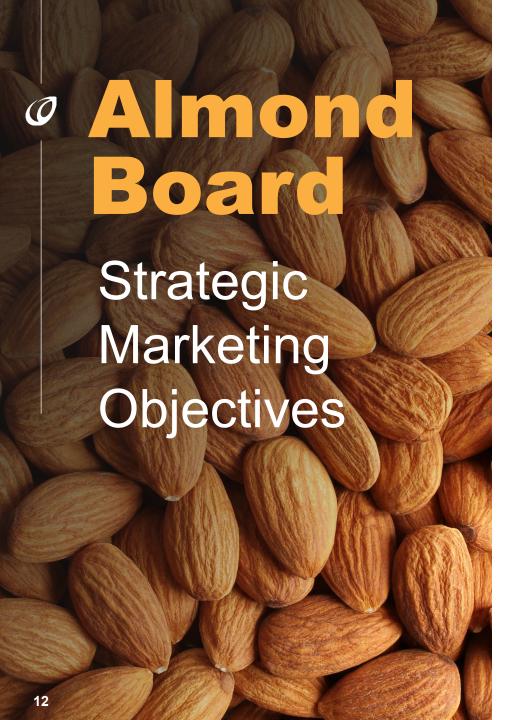


# 37% increase over the last two years











Build long-term worldwide demand for California almonds

2

Create an environment in which almond perceptions and almond brands thrive



Address issues and seize opportunities that are best handled at an industry-wide level



Contribute to the financial well-being of the industry





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## **Global Market Development Committee**MEMBERS



Brian Ezell Chair Wonderful



Raj Joshi Vice Chair Blue Diamond Growers



Brian Wahlbrink Sperry Farms



Darren Rigg Minturn Nut Company



Dinesh Bajaj Select Harvest



Laura Gerhard
Blue Diamond Growers



Craig Duerr
Campos Brothers Farms



Jared Smith
Fisher Nut Company



Maya Erwin Blue Diamond Growers



Warren Cohen
Blue Diamond Growers

## Global Market Development Committee ALTERNATES



Bill Morecraft
Blue Diamond Growers



Christine Lott
Blue Diamond Growers



Paul Ewing RPAC Almonds



Keith Kwan Taylor & Sims, Inc.



Patrick Anderes
Panoche Creek Packing



Andrew Downie
South Valley Farms



Ranjeet Pradeep Hughson Nut Inc.



Sean Allen Blue Diamond Growers



**Bikram Hundal**Custom Almonds LLC/Toor
Farming



Suzanne Hagener Blue Diamond Growers

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#### **Global Market Development**



North
America
Jenn
Freeman



India
Sudarshan
Mazumdar
Based in Delhi



Europe
Dariela
Roffe-Rackind
Based in London



China
Connie
Cheung
Based in Hong Kong



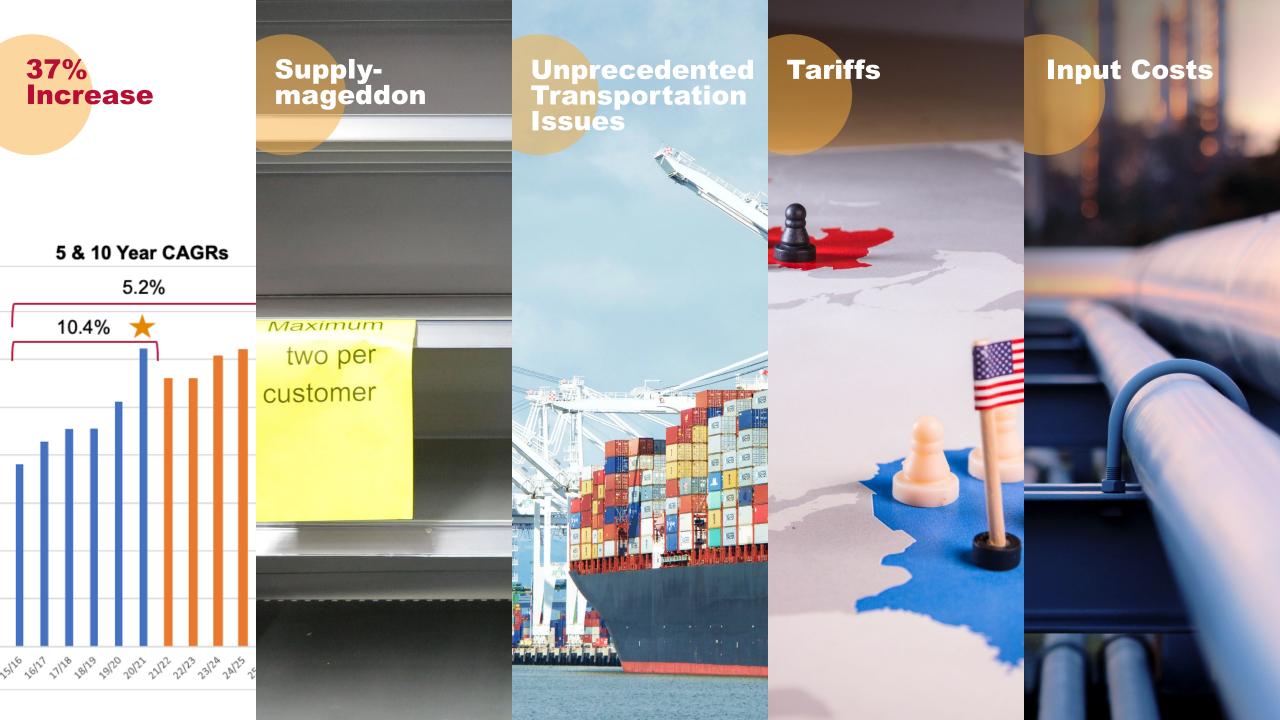
South Korea & Japan Murielle Kim Based in Seoul



Trade
Stewardship
& Marketing
Harbinder
Maan



Marketing Services Melissa Mautz









#### ABC Around the World





## India

Tremendous upside: 0.32 lbs per capita consumption and 1.4B people

Deep cultural associations with almonds

Increasing investment and shifting approach





## ABC's investment in India has grown dramatically

2nd

largest marketing investment +78%

increased impressions since 19/20

+80%

budget increase since 19/20

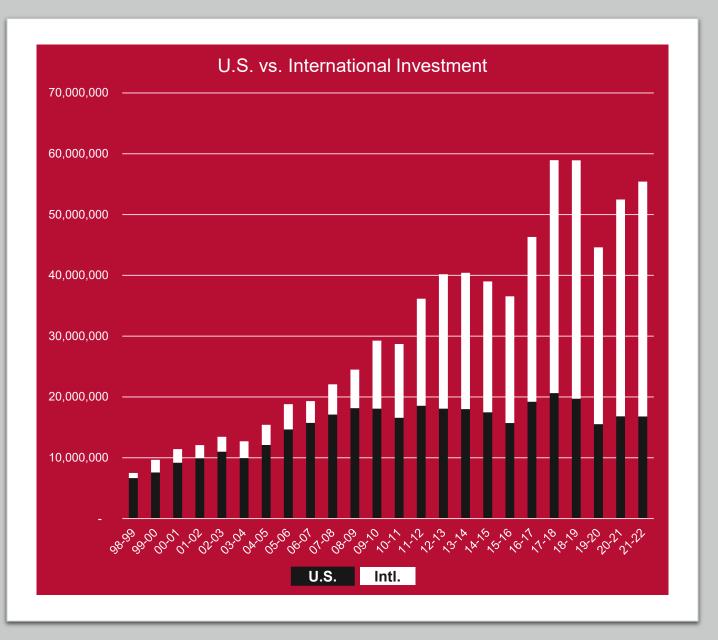
## OU.S.

800 million pounds

Shifting approach to breakthrough in this mature market



## U.S. budget drives efficiency





2005-20060% digital2009-201020% digital2015-201624% digital2018-201943% digital2021-202270% digital



28

## New Tool:

Marketing Mix Modeling









### Chongqing

3<sup>rd</sup> largest city: 16.4 million people

Largest economic center in Western China

#### **Tianjin**

4th largest city: 13.8 million people

Near Beijing

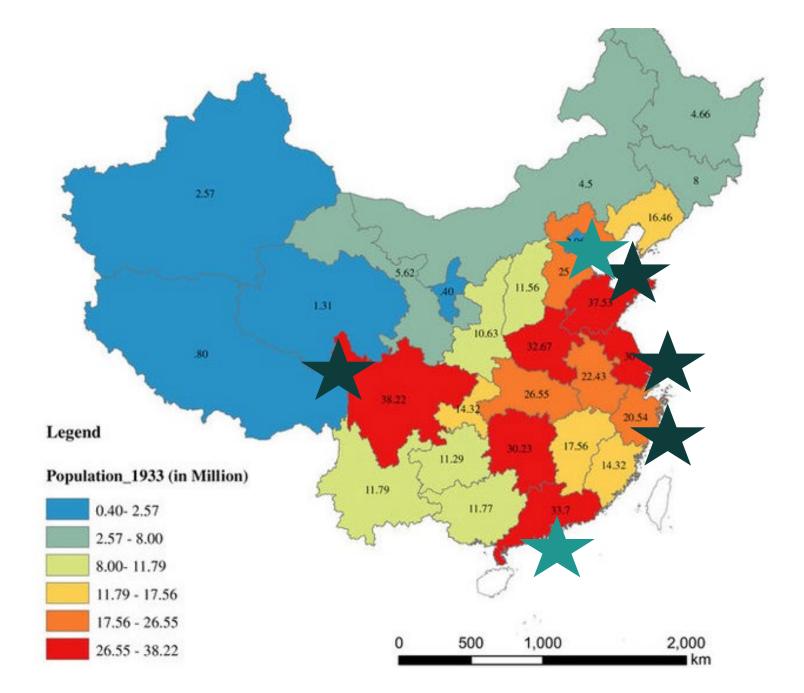
#### Hangzhou

11th largest city: 7.8 million people

Home to culture and outstanding museums







#### Markets on the Horizon







**Taste** 

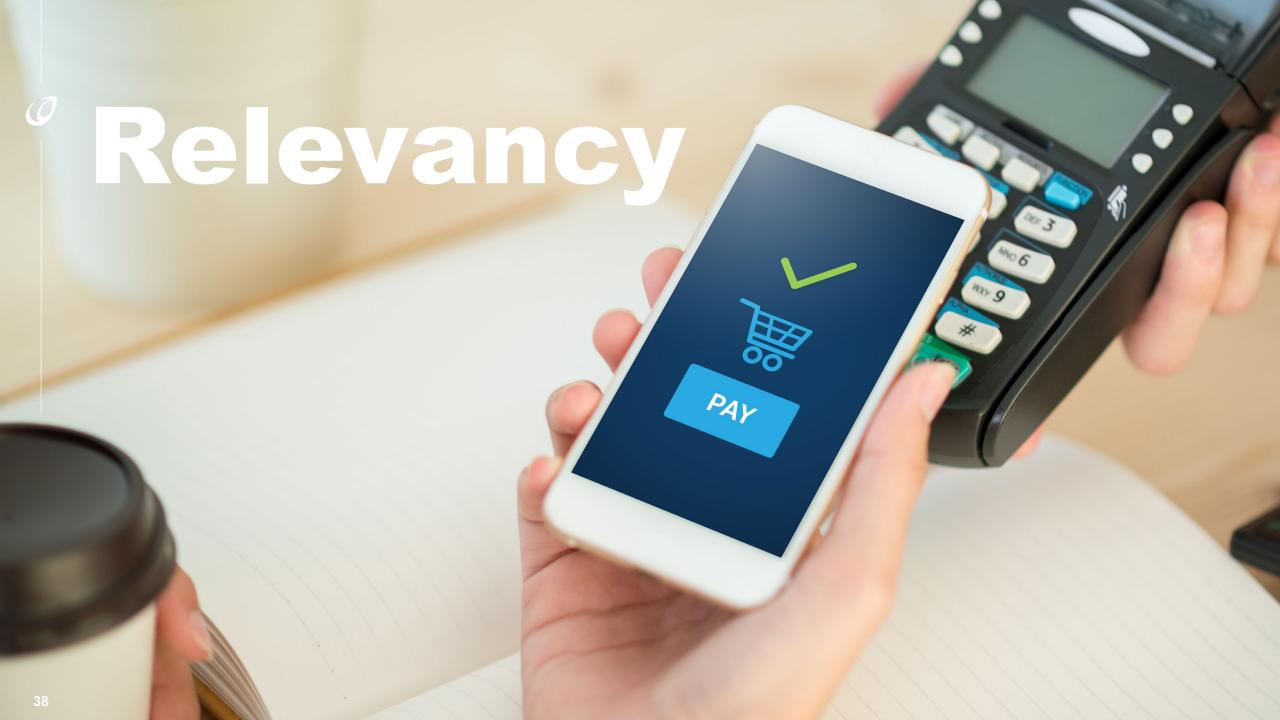


Health



Convenience









# New on package claims abound



antioxidants



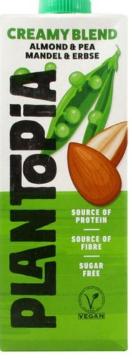
plant based protein no sugar



protein



fiber no additives



fiber protein sugar free

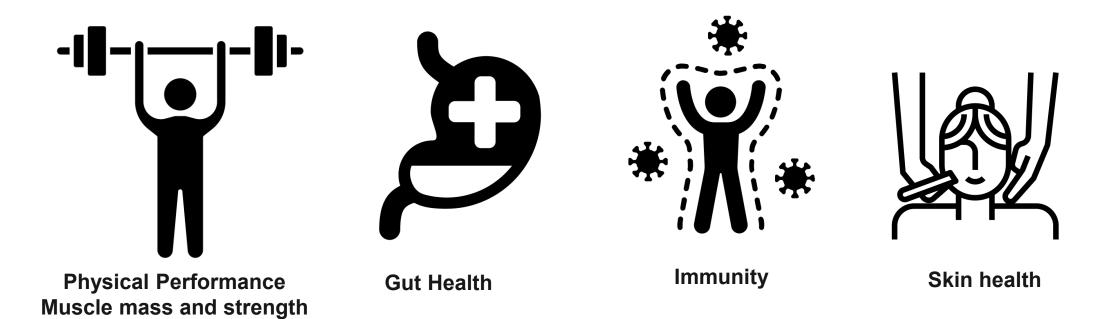


versatile fiber



protein calcium

# **New Nutrition Research**







## The unstoppable rise of wellness continues

JUNE 11, 2021 • SPA EXECUTIVE • ARTICLES, BUSINESS

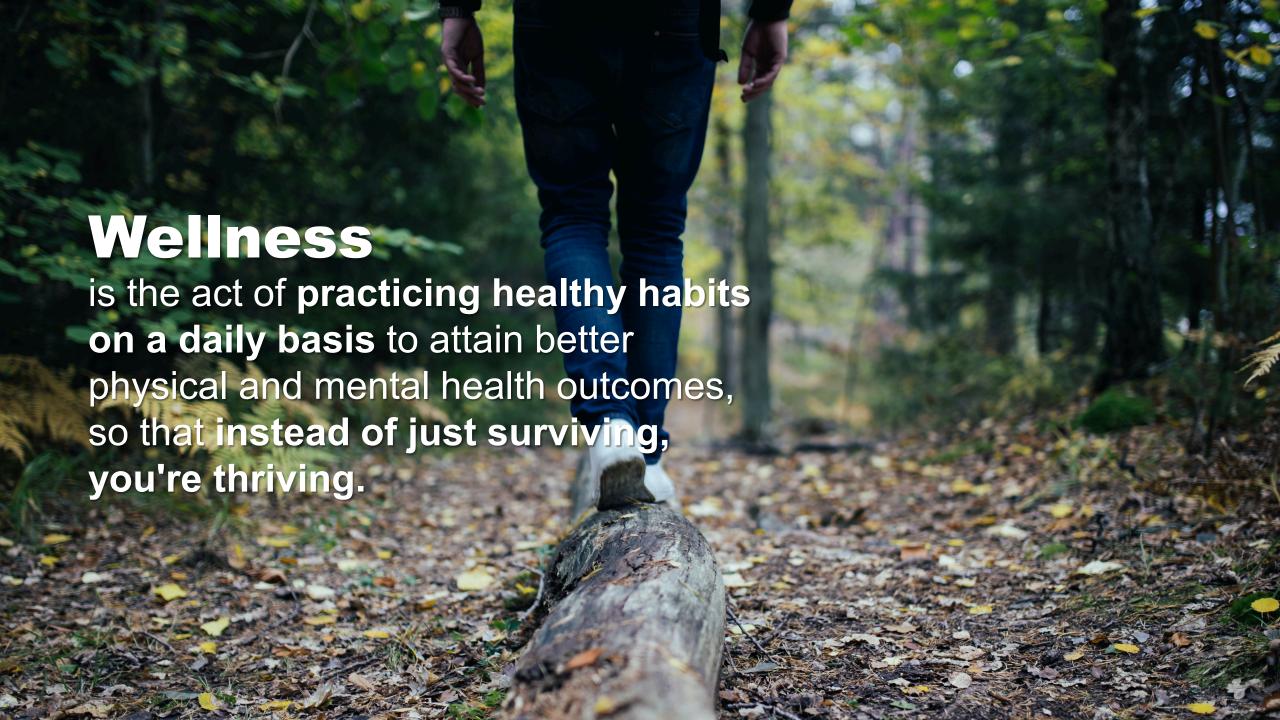
THE FUTURE OF WORK

# The Rise of the Wellness App

Why The Wellness Business Is Booming (And How To Succeed In The Industry)

**WebMD** 

Make Your Resolution Wellness, Not Weight Loss



Wellness is bigger than ever, and it remains a priority across the globe



believe wellness is important

consider it a top priority



# It includes broader views including mental well-being

According to the same report, today's consumer views wellness across six dimensions



**Better** health



**Better** fitness



**Better** nutrition



Better appearance



Better sleep



**Better** mindfulness

Evolution of U.S. Marketing Goal: Increase Millennial Almond Consumption

From: love being busy energy 6 grams of protein 33 y/o seek balanced lifestyle wellness immunity, balance, skin care, heart health, antioxidants and more!

# Eat This, Not That:









# Sustainability is table stakes in the EU

## **AVOCADO, COCOA AND ALMONDS: THE**

#### **5 VEGAN FOODS THAT AREN'T AS ECO-**

#### FRIENDLY AS YOU THINK

Several plant-based foods have come under scrutiny lately due to reports claiming they are bad for the





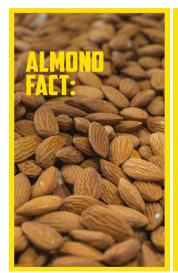
End of the avocado: why chefs are ditching the unsustainable fruit

Give peas a chance - as well as pistachios, fava beans and pumpkin seed paste. These are just some of the ingredients peing used to replace one of the world's most popular fruits

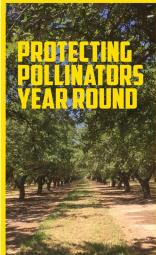




We communicate about our sustainability journey to protect against reasons not to eat almonds













GROWING GOOD

Almonds, Health + Sustainability: Behind the Headlines



#### Keto, Vegetarian, Paleo, Flexitarian...

However you choose to eat, almonds are the perfect addition to a healthy diet and are packed full of nutritional benefits such as B vitamins (82, 83, 81 and 89), magnesium, fibre and plant-based protein.

But for many of us, it's not enough anymore to just eat foods that are good for us. We want our food choices to be good for the planet too.

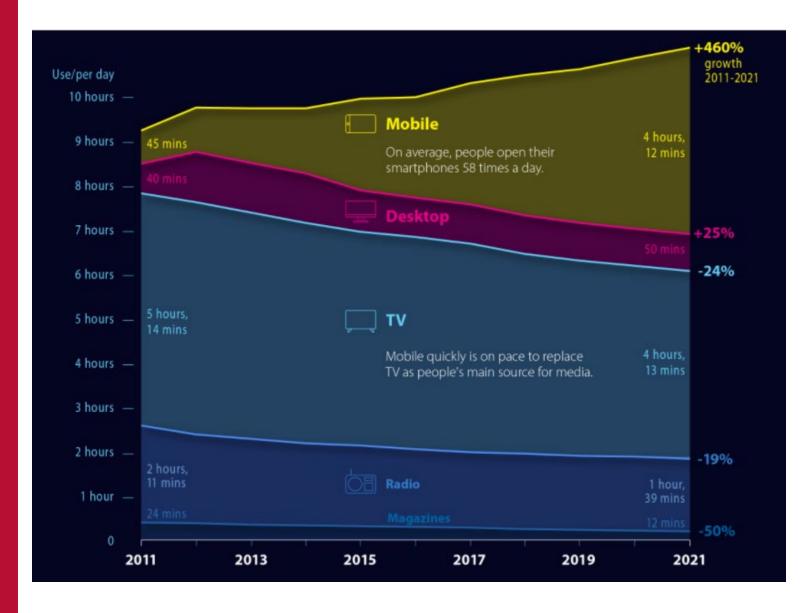
While determining if a food is healthy is fairly simple, it's not always the case when it comes to a food's sustainability credentials. In fact, it's a prety complex and confusing area. Which is why we've asked third-generation almond farmer and the Almond Board's Senior Sustainability Manager, Danielle Veenstra, to take a look behind the headlines and give you the inside scoop on how California almonds are grown.







# Global Media Consumption is shifting



# MoreDigital

U.S.

2015-201624% digital2018-201943% digital2021-202270% digital



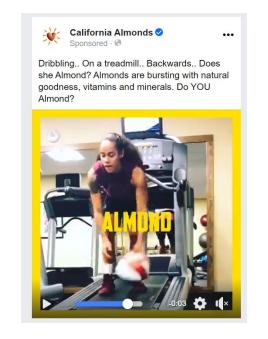


#### **CHINA**

2013-2014 30% digital 2016-2017 61% digital 2019-2022 100% digital

#### EU

2015-2016 51% digital2018-2019 40% digital2021-2022 95% digital





#### **INDIA**

2015-2016 0% digital2018-2019 1% digital2021-2022 17% digital





# Who consumers trust matters

63%

of consumers report they trust what influencers say about brands more than they trust the brand's advertisements

49%

people rely on influencers' recommendations when making purchase decisions

# Plant Based









# Milk









# **New Categories**



















# **Beauty Products**















# New innovation has begun



## With endless possibilities

**Creating More Value from Almond Biomass**Thursday 2:45-4:00 P.M.



