



2018 | THE ALMOND CONFERENCE

EUROPE: INSPIRING GLOBAL TRENDS AND
CRACKING ALMOND INNOVATION

ROOM 314 | DECEMBER 6, 2018



AGENDA

1

**Julie
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Associate Director,
Trade Marketing
and Stewardship
(ABC)



4

**Dariela
Roffe-Rackind**

Director Europe
& Global Public
Relations (ABC)



1,739,932,904

47.4

4

1

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EU: AND THEN THERE WERE 27....



EU TRADE ISSUES ARE AT A CROSSROAD...

- On March 29, 2019, Brexit will change the face of the EU...
- Existing Tariff Rate Quota – allocate portion to UK or remain with EU?
- Future trade agreements to be negotiated with EU and UK
- Technical and Sanitary/phytosanitary barriers are the real concern: driven by philosophical differences, and harder to address...
- “Rules-Based” and “Scientifically-Supported” *do not* always rule the day...



EU – MARKET SITUATION

Aflatoxin controls increased due to higher insect damage, higher aflatoxin levels

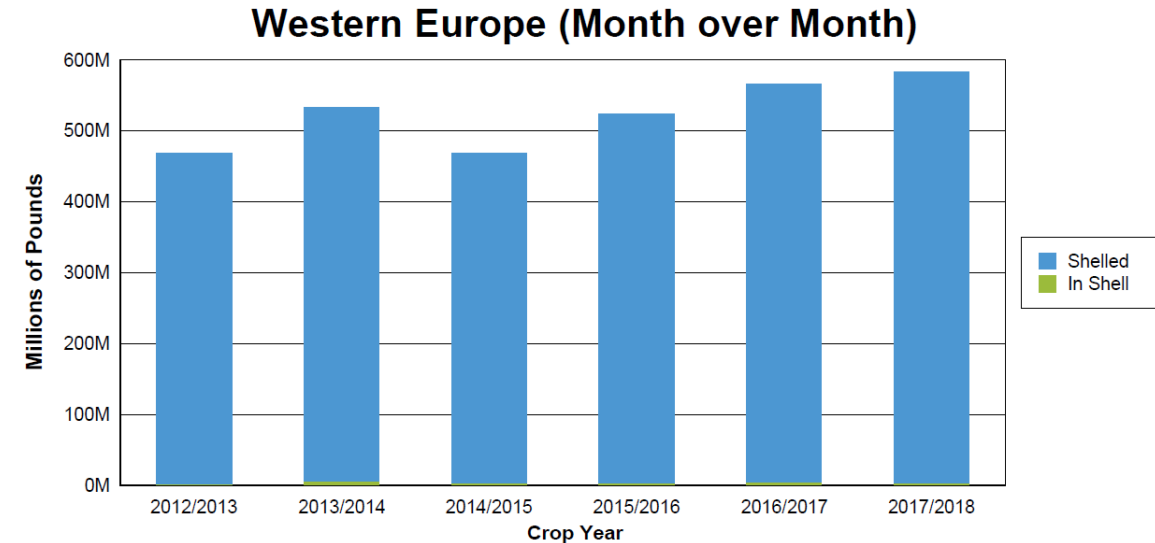
- Aflatoxin rejections threaten almond pre-export recognition
- 31 rejections in 2018
- Return to <1% inspection *if rejections remain low*

Engagement has helped head off PEC suspension, further controls

- Industry proactive approach
- Minimum grade standards

Chemical tools face more restrictions

- Hazard approach does not consider exposure
- Existing tools under pressure – e.g. iprodione, glyphosate
- Insufficient phase-out / transition



Alliances are Key

- Engagement with European associations to broaden our “voice”
- Reputation and trust are essential – with authorities, customers and consumers
- Shows ABC commitment to local economy, trade, consumers

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A top-down view of a rustic table setting. In the upper left, a white ceramic coffee pot sits on a dark surface. Next to it are two black ceramic mugs filled with a light brown beverage. To the right of the mugs, a silver fork is placed on a dark surface, with several figs (some whole, some sliced) scattered around it. A small sprig of thyme is also visible. In the lower half of the image, a large, shallow, light-colored bowl is filled with a variety of food items: sliced hard-boiled eggs, a wedge of white cheese, sliced figs, almonds, and clusters of purple grapes. The entire scene is set against a dark, textured background. A semi-transparent orange banner is overlaid across the middle of the image, containing the text "EU FOOD AND LIFESTYLE TRENDS" in white, bold, uppercase letters. A small white horizontal line is positioned below the text.

EU FOOD AND LIFESTYLE TRENDS

A festive scene featuring three pineapples. The central pineapple wears a yellow party hat and a pair of black sunglasses. The pineapples are surrounded by large, colorful balloons in shades of blue, green, and yellow. The background is a bright, solid white.

THE '-ISH'

SOME EVENINGS YOU GYM.
SOME EVENINGS YOU GIN.
WE GET IT.



**The chirpy campaign for Yushoi
pea snacks appeals to all lifestyles**



**Luxe workout
brand Sweaty
Betty created
an inclusive
approach
with its 'fit-ish'
strapline**



Media coverage showing how being flexible has become the way to live



DISRUPTIVE

SUSTAINABILITY



**Nous is the world's
first no-waste
supermarket, which
only sells 'rescued
food' that cannot be
sold anywhere else**



Bakery chain Gail's has launched the UK's first loaf made from leftover bread

THE RUBBISH CAFÉ



Environmentally friendly cleaning brand Ecover's pop-up Rubbish Café makes consumers pay using plastic rubbish

A detailed still life composition of various fresh ingredients arranged on a wooden surface. The items include clusters of dark purple grapes, several whole and sliced figs showing their red interiors, two large mushrooms, a whole peach and two sliced ones, a bright yellow lemon, green and pinkish beans, white flowers, a large avocado, a round loaf of bread, and some nuts. The text "NEW BASICS" is centered over the image in a white sans-serif font on an orange rectangular background.

NEW BASICS

**Budget
supermarket
Morrisons is making
veg widely
accessible with its
Bargain Vegetable
Boxes**





Allotments have gained popularity in Germany as urbanites seek to add some greenery to their daily lives



DISCOVERY:

THE ADVENTUROUS

CONSUMER



robdoo • Follow
ICE

robdoo Found out today from someone in the states that there's an #icecream shop in #Falkirk selling #mayonnaiseicecream ☐ had to find it and try it! @ice_falkirk - #ice #icefalkirk #visitfalkirk #shoplocal #scotland

faichnie Is it ok?

robdoo @faichnie it's "ok" 😊. I couldn't finish it tbh: it's definitely mayo ice cream! I did get an additional "safe" ice cream which was great!

dan.164a I love mayonnaise but that is too far

mochitloon Baulk! ☐

robdoo @dan.164a I agree 😊

sylvie_winryskye Hahahah is that for real?! 😂😂 how was it?!

robdoo @sylvie_winryskye legit tasted



41 likes

JULY 27

Add a comment...

An ice cream shop in Scotland has created 'mayonnaise ice cream' which has become a social media hit



**Swarm
protein bars
use insects
to deliver
amino acids
and micro
nutrients**

try our
beetroot
with cumin...



red pepper
with zing!



cucumber and
wait for it dill!

mediterranean

avocado
and lime

Is it a yogurt, a dip or a sauce?...

WHAT DOES THIS MEAN FOR ALMONDS?

THE -ISH



DISRUPTIVE SUSTAINABILITY



NEW BASICS



DISCOVERY: THE ADVENTUROUS CONSUMER



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2018

THE ALMOND CONFERENCE

Europe – Leader in food innovation

HARBINDER MAAN,
Associate Director, Trade Stewardship and Marketing



INTRODUCTION

1. #1 Global nut in new products
2. Europe, strong ingredient usage
3. Europe as a hub for new product introductions
4. Key food trends being driven by Europe
5. Examples

NEW

NESCAFÉ

COFFEE PROTEIN SMOOTHIE

AS EASY AS CATCHING A RIDE ON A PROTEIN-POWERED BULLET TRAIN

HACK YOUR MORNING
BREAKFAST ROUTINE WITH
OUR DELICIOUS PLANT PROTEIN
POWERED COFFEE SMOOTHIE.

BANANA
NATURAL FLAVOR

NESCAFÉ

COFFEE PROTEIN SMOOTHIE

MADE WITH REAL
COFFEE,
OATS,
ALMOND BUTTER,
BANANA

15g PLANT PROTEIN

1 CUP OF COFFEE
Equivalent to one 6 oz cup of
NESCAFÉ® Colombian Coffee

12g CANE SUGAR

11 FL OZ (325 mL)

MOCHA

NESCAFÉ

COFFEE PROTEIN SMOOTHIE

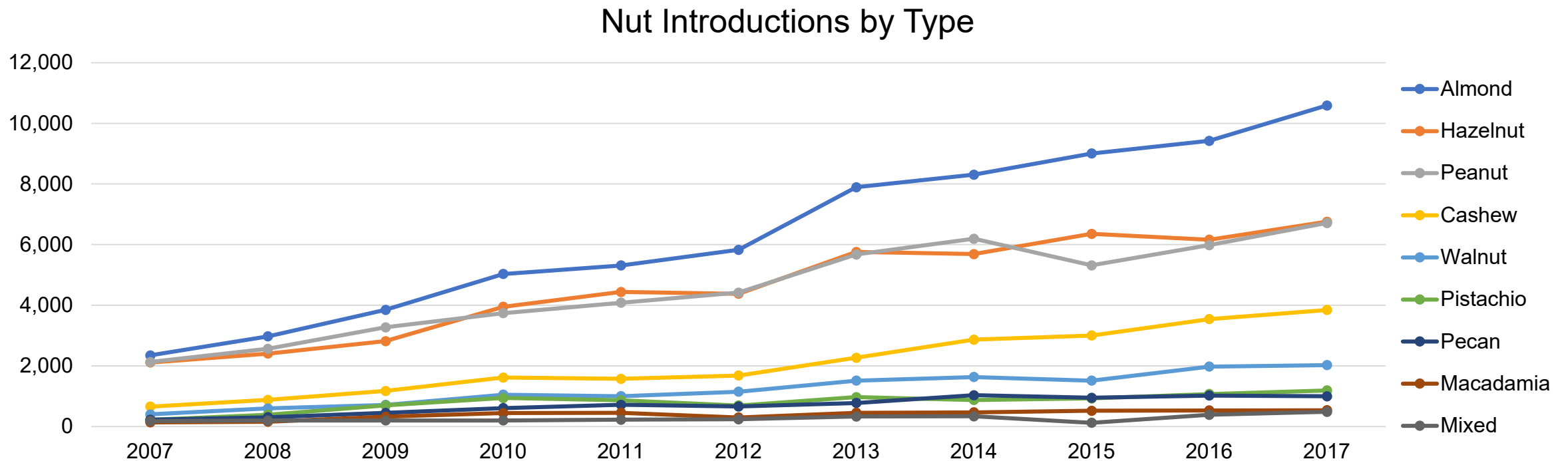
MADE WITH REAL
COFFEE,
OATS,
ALMOND BUTTER,
COCOA

15g PLANT PROTEIN

11 FL OZ (325 mL)

ALMONDS ARE THE MOST USED NUT IN NEW PRODUCTS GLOBALLY!

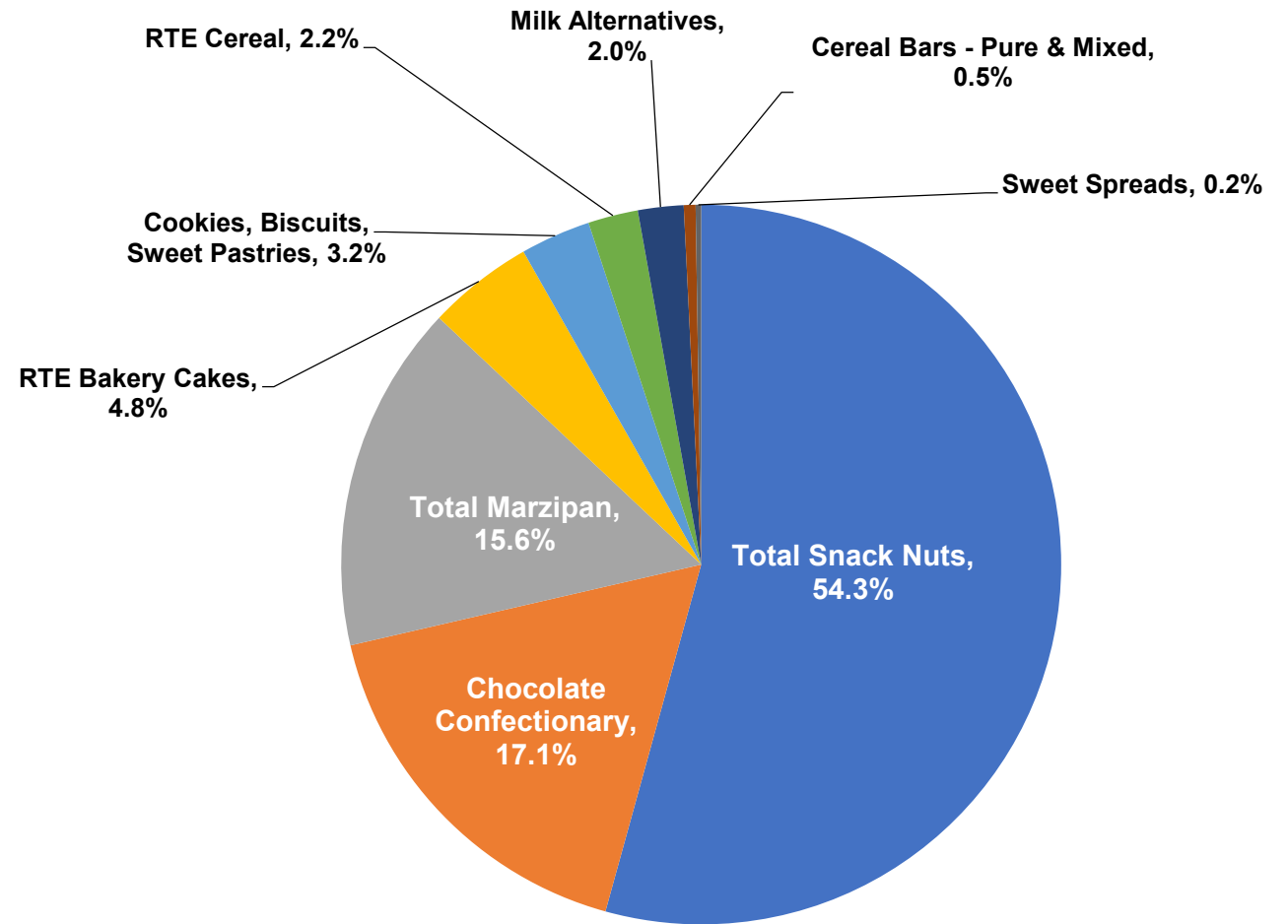
For over 10 years, almonds have remained the most-used nut in new product introductions.



CATEGORY PERFORMANCE: PURE ALMOND VOLUME SHARE BY CATEGORY – GERMANY, 2016

INGREDIENT
CATEGORY STILL
IMPORTANT !

Category Share of Pure Almond Volume

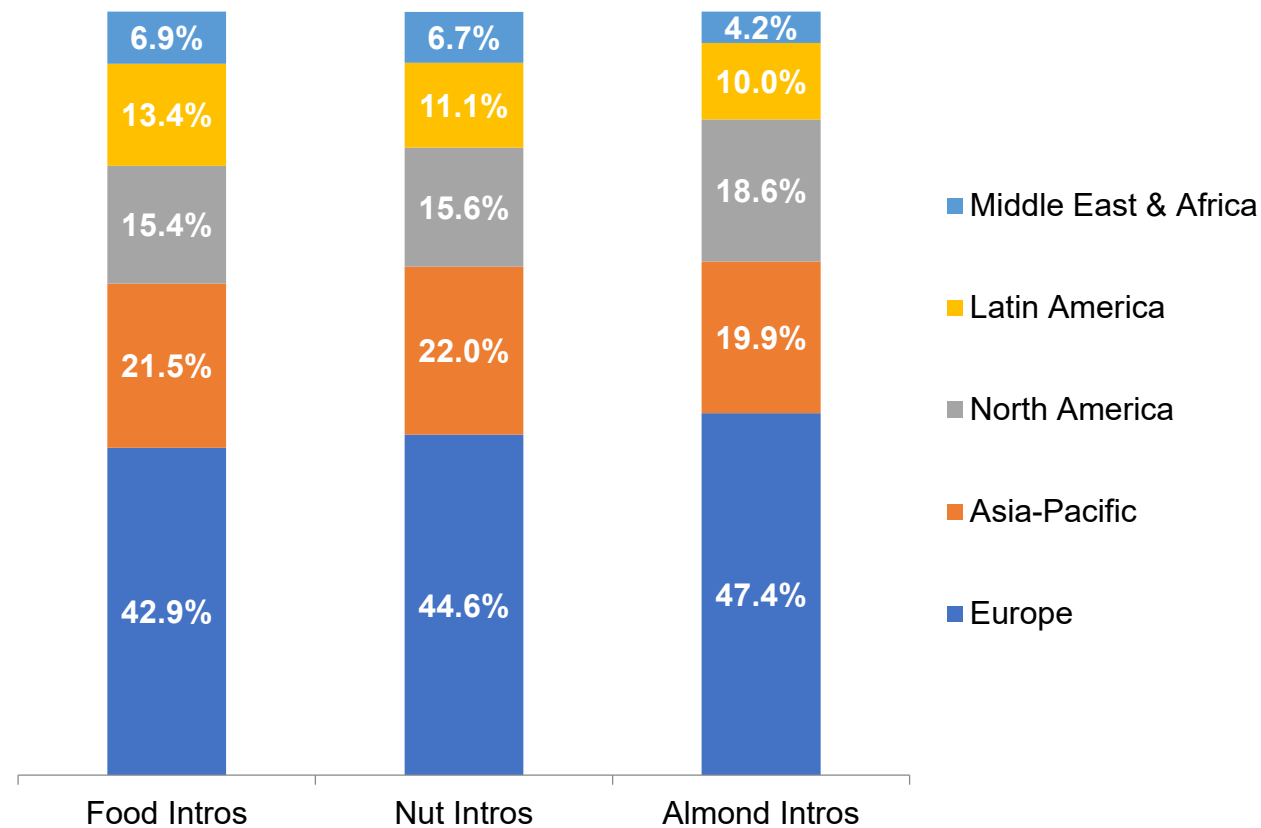


- Total snack nuts category represents the largest pure almond volume share at 54.3%, followed by chocolate confectionary (17.1%) and total marzipan (15.6%).
- As one of the largest markets for California Almonds, Almonds as an ingredient represent about 46% of almond usage in Germany.

EUROPE IS THE TOP REGION FOR FOOD, NUT AND ALMOND INTRODUCTIONS

- Europe drives the greatest volume of new product introductions around the world

2017 Global Food, Nut, and Almond Introductions *Regional Share*



- Europe's share of almond introductions respectively outpaced their share of nut introductions, which outpaced their share of total food introductions.



CONSUMER BENEFITS LEAD TO STRONG NEW PRODUCT LAUNCHES

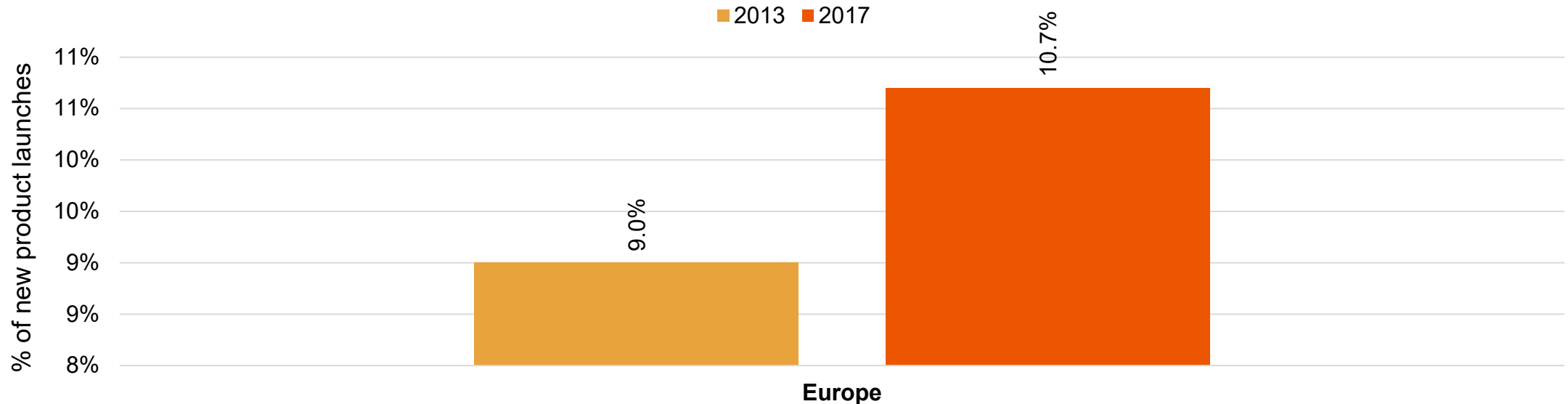
- Almonds especially dominate new snack product introductions in Europe

Europe	Almonds	Hazelnuts	Peanuts	Cashews	Walnuts	Pistachios	Pecans	Macadamias
Confectionery	1,369	1,873	357	66	68	167	28	39
Snacks	831	334	646	649	263	171	108	51
Bakery	1,001	971	159	88	161	72	49	20
Bars	597	187	383	326	45	30	24	20
Cereals	344	304	34	90	45	7	50	8

1 IN 10 SNACKS FEATURED ALMONDS IN EUROPE IN 2017

**Snacks with almonds continue to grow with almonds,
not only are total new products increasing almonds share is also increasing**

Almonds as percentage (%) of new snack*
launches tracked by region/country (2017 vs. 2013)





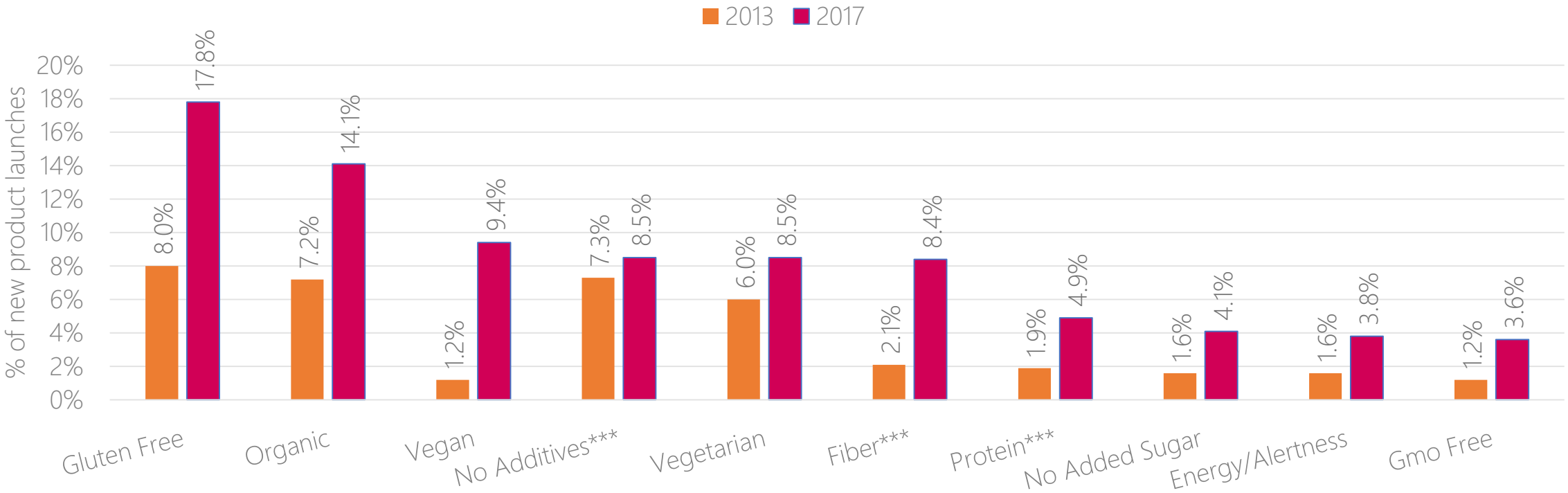
Europe – creating momentum in food trends

Key consumer trends driven by two
platforms, wellness and ethics





Health & Wellness is a growth platform for European snacks with almonds



*Snacks: including the snacks market category in the Innova Database as well as other snacking related categories

**Health & wellness claims: health, free from and clean label claims

***No additives=no additives/preservatives, fiber=high/source of fiber, protein=high/source of protein

GLUTEN FREE AND PROTEIN



Deluxe Gluten Free 4 Almond, Sea Salt And Dark Chocolate Nut Bars

United Kingdom, March 2018

DESCRIPTION: gluten free premium nut bars with a mix of **almonds**, puffed rice with sea salt and dark chocolate.

Walmart
United Kingdom | Feb 2017



**Asda
Almond Shot**

Enervit
Italy | Sep 2017



Gluten Free Bar With Extra Blueberry and Chocolate



Kelloggs Special K Protein Bar With Blackcurrant And Pumpkin Seeds

Ireland, Feb 2018

PROTEIN AND CALIFORNIA PROVENANCE



Maxim Protein Bite With Almond Crunch Flavor

Norway, Sep 2017

DESCRIPTION Protein bite with almond and a high content of natural ingredients. It contains a lot of vegan protein and fiber and is also low in sugar. Ideal before, during and after training.



Magnum White Chocolate Honeycomb And Almond Ice Cream Bar

United Kingdom, Mar 2018

DESCRIPTION Four honeycomb flavored ice cream bars coated with white chocolate (28%) and almonds (5%). Comes in plastic packets, held in a carton box.

CLAIMS Cracking chocolate. **Californian almonds.** Rainforest Alliance Certified cocoa. Green Dot Certified.



Ferrero Raffaello Coconut Almond Confection

Germany, Apr 2017

DESCRIPTION Individually wrapped coconut almond confections in a carton box. The unique recipe of Raffaello is a carefully selected composition of ingredients: **white almonds from California**, coconuts from the pacific islands and fine cream. Raffaello is pure enjoyment.

NEW: ALMOND FORMS FOR INNOVATION



Almond Milk with
Pear and Vanilla
Flavor

France, Mar 2018



Picard

France, May 2017

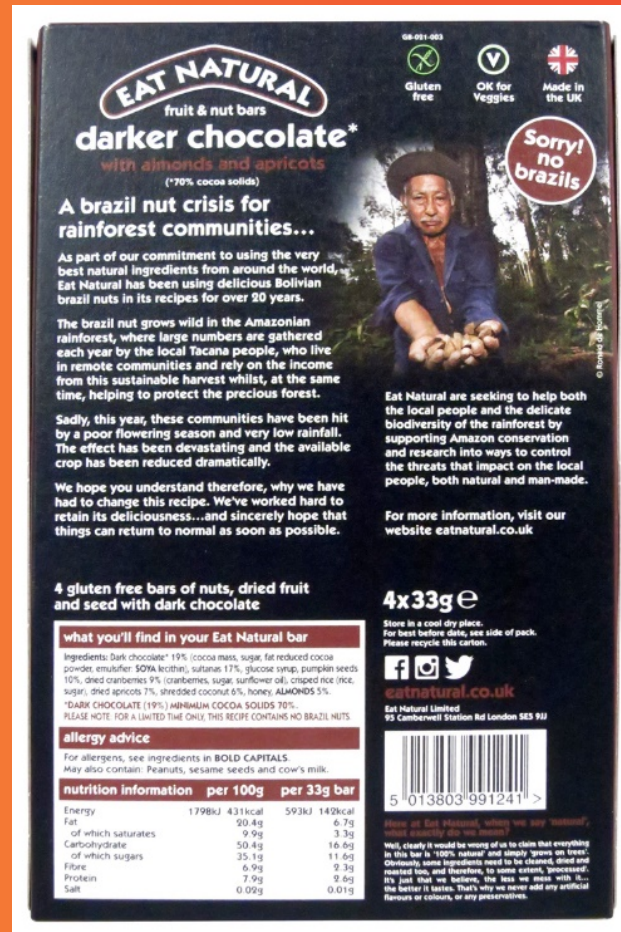
DESCRIPTION : 3 Best Almond
Milk-Apricot Ice Cream



STREICHZART & natürlich



Ethical – Environment & Human



Eat Natural Darker Chocolate Fruit And Nut Bars **With Almonds** And Apricots

United Kingdom, Nov 2017

CLAIMS Gluten free. Eat Natural are seeking **to help both the local people and the delicate biodiversity of the rainforest by supporting Amazon conservation and research into ways to control the threats that impact on the local people**, both natural and man-made. **Recyclable carton box**. No artificial flavors or colors. No preservatives.

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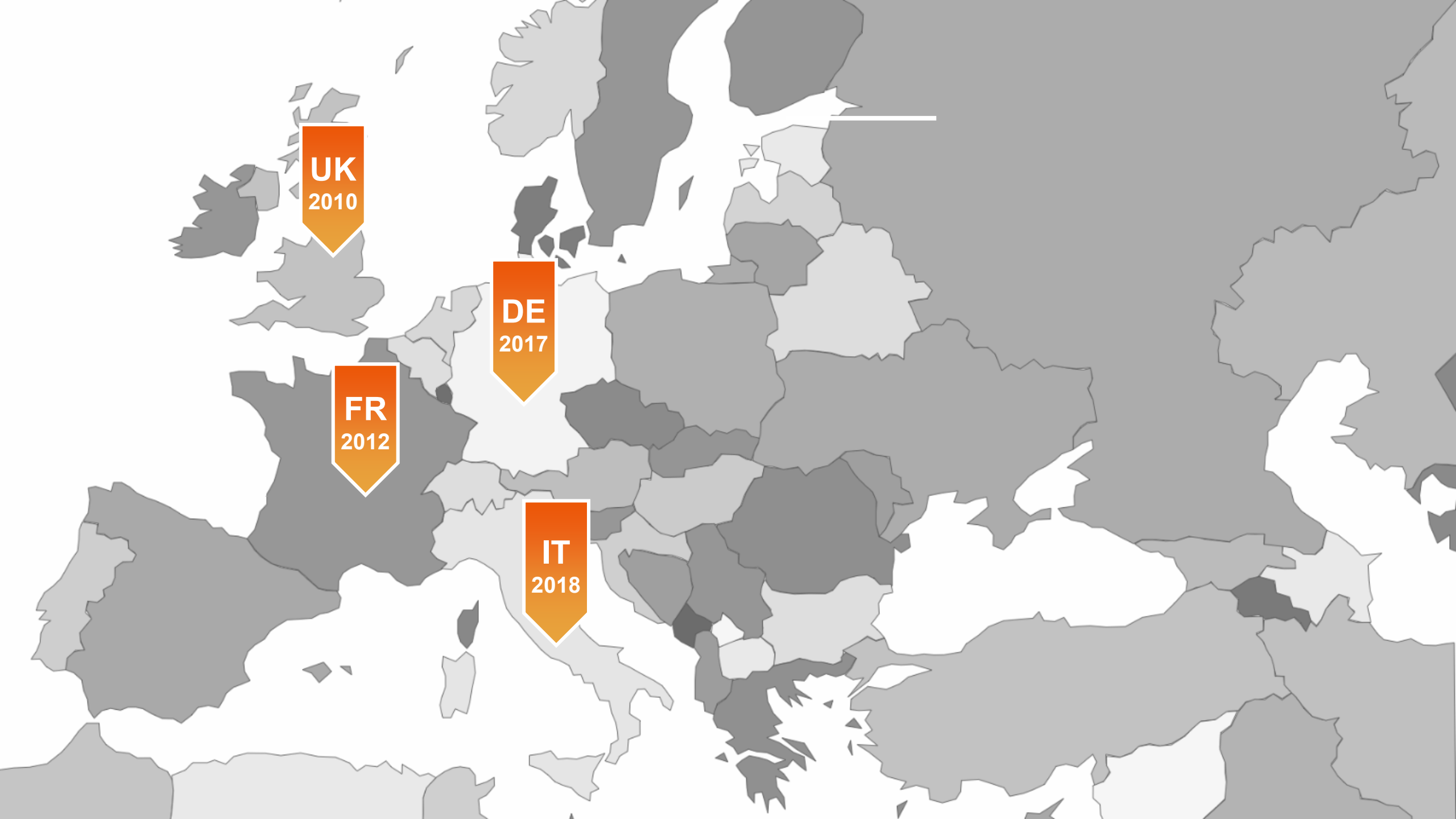
Dariela Roffe-Rackind
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Over 14 years of investment in public relations (and advertising) in the European market to raise awareness and demand for almonds.



2009 shifted the consumer focus from ingredient usage to snacking in Europe ...

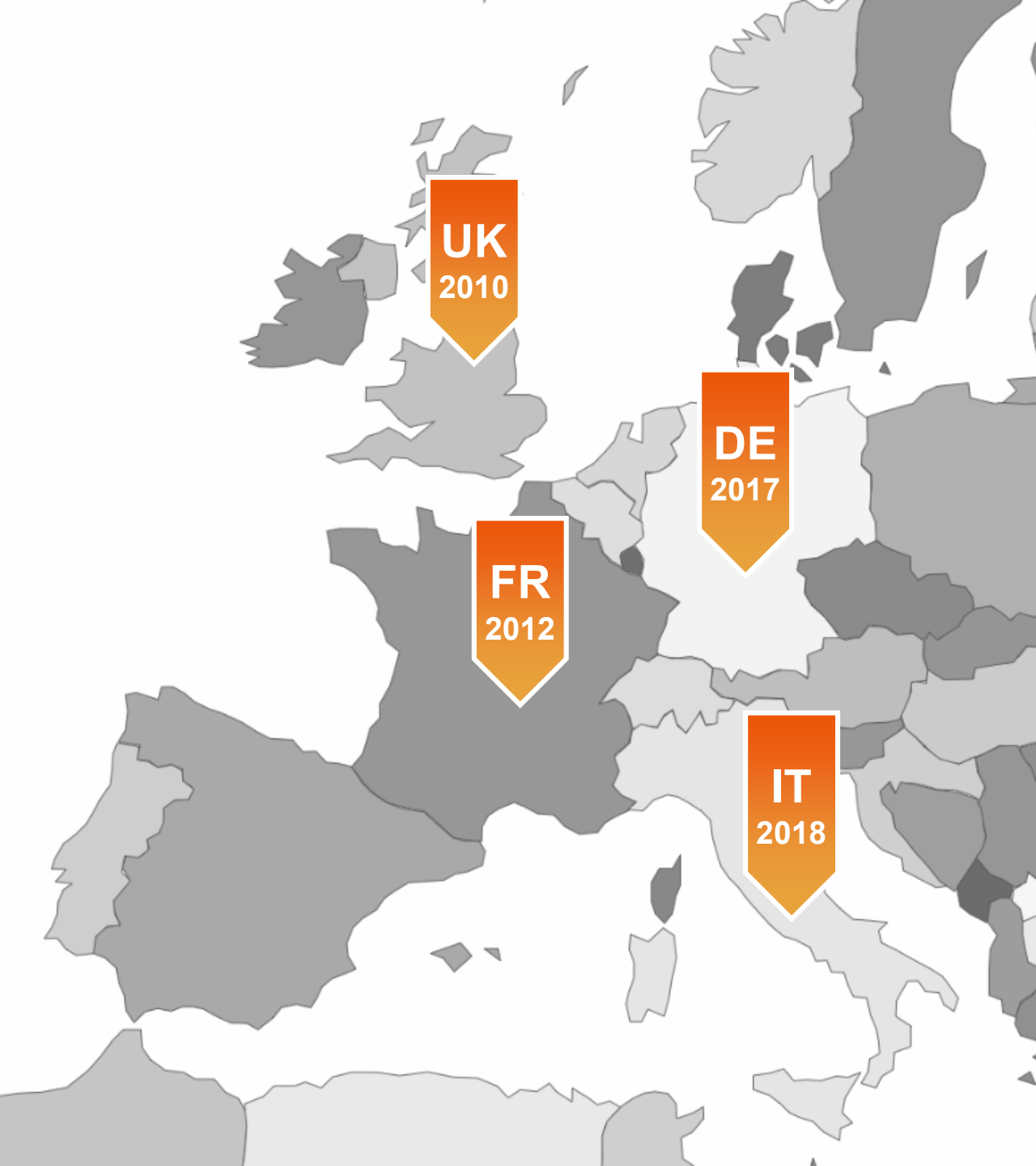


UK
2010

DE
2017

FR
2012

IT
2018

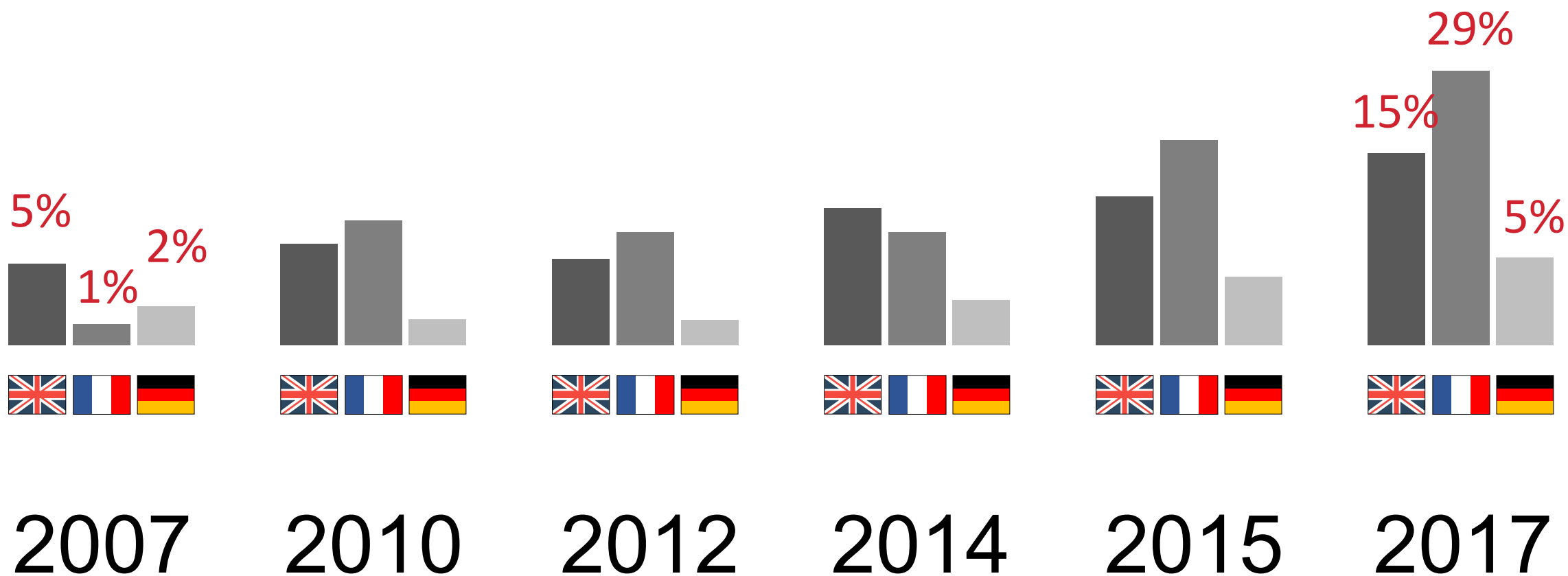


Why France, Germany, United Kingdom, Italy?

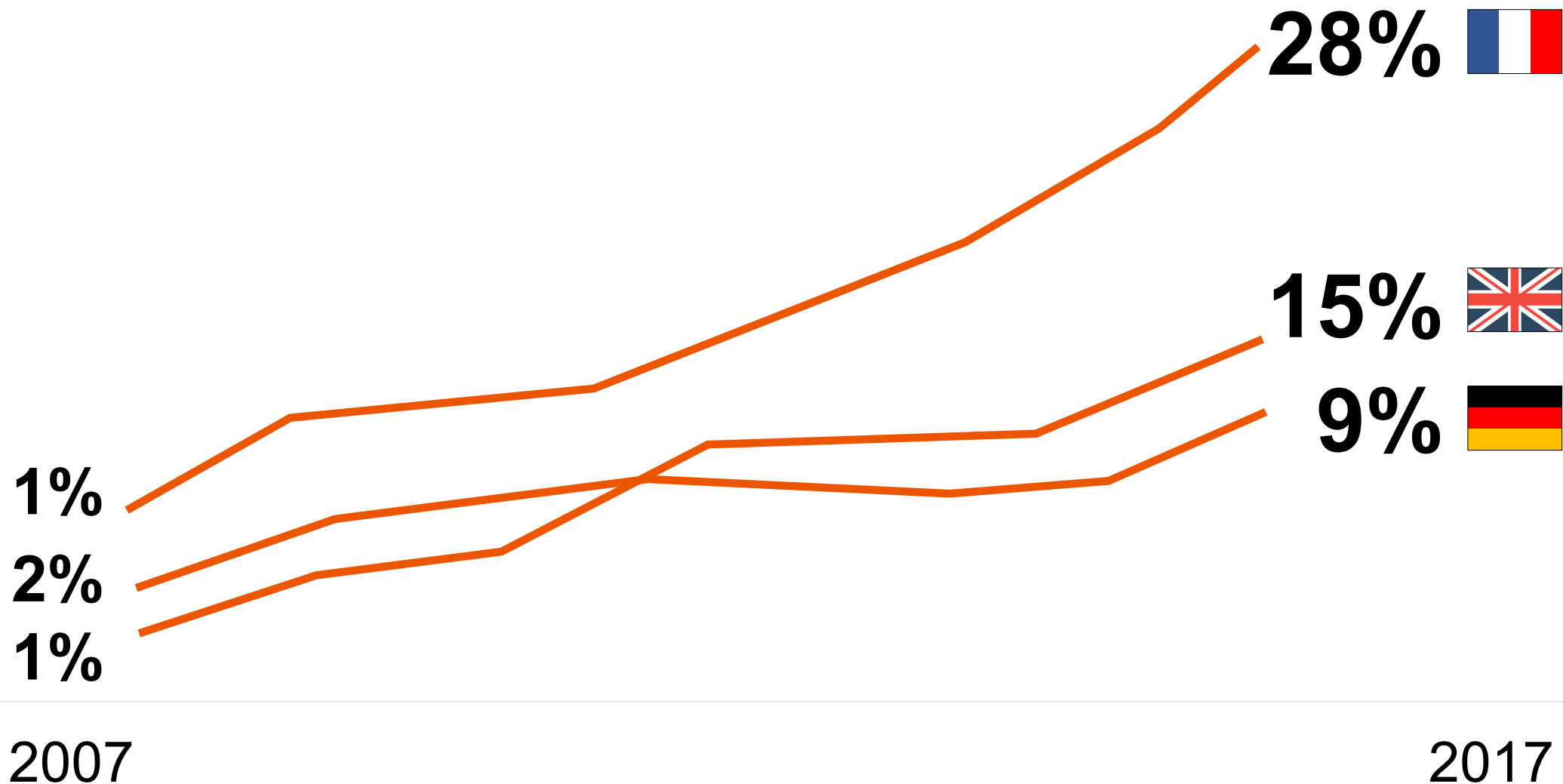
- Addressable populations
- Largest retail food spenders
- Top markets for new almond product introductions
- Heritage with nuts & almonds
- Availability of almond products
- Influencers to the rest of Europe

PLAY VIDEO

TOP OF MIND ALMOND AWARENESS...



AWARENESS OF ALMONDS AS A SNACK...



1,739,932,904

The number of consumer impressions generated through our marketing programs
(that's like filling the 49ers Levy stadium 25,400 x)

47.4%

The percentage of new global almond products that are introduced in Europe
(4,142 New Products Introduced)

4

The number of European markets where we now run consumer snack campaigns
(UK, France, Germany, Italy)

1

Almonds are the #1 nut in Europe for new product introductions for the third year running



Thank you!

