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Mission and Objectives

Founded in 1983, the International Nut and Dried Fruit Council (INC) is the global organization representing the interests of the broadest nut and dried fruit ecosystem, including producers, processors, traders, distributors, consultants, laboratories, machinery companies, packers, and trade organizations.

- **Mission:** To stimulate and facilitate sustainable growth in the global Nut and Dried Fruit Industry.
- **Vision:** To be the international source for information on Nuts and Dried Fruits for Health, Nutrition, Statistics, Food Safety, Government Standards and Regulations regarding Trade Barriers and Agricultural Quality Standards.

INC aims for:

- Increasing the understanding about production, processing, marketing, distribution and consumption trends in the nut and dried fruit industry.
- Growing marketing access by monitoring customs duties and trade barriers and advising governments on behalf of INC membership.
- Assuring global quality standards and trading terms are within the framework of existing national and international bodies and do not inhibit trade within the industry.
- Promoting research, especially nutrition, education and new product development.
- Encouraging international cooperation by interacting with various public, private, national and international organizations, which share our common goals.
- Increasing goodwill and mutual understanding of the nut and dried fruit industry by promoting international meetings in producing and consuming countries.

Membership Benefits

INC supports the whole nut and dried fruit industry in reaching its international growth objectives and provides the platform that ensures the sector remains united and focused.

- Chance to contact 800+ member companies from almost 80 countries via the INC Online Members Directory.
- Access to industry leaders through advertising opportunities in the Nutfruit magazine, newsletter and website.
- Networking with top industry managers and access to the Online Meeting Point with 1,300+ Congress participants.
- Up to 30% discount on the Annual World Nut and Dried Fruit Congress and exclusive sponsorship opportunities.
- Exclusive opportunity to exhibit at the INC Nuts and Dried Fruits Pavilion at SIAL-Paris, Anuga and Gulfood.

- Sponsorship opportunities to promote your brand and enhance your reputation at top world trade fairs.
- Three free annual printed and online issues of the Nutfruit magazine, which provides global news and information about statistics, food safety, trade issues, new promotional ideas, scientific findings and many other topics.
- Monthly e-newsletter with the latest research findings and government regulations, press reviews with international media news promoting the health benefits of nuts and dried fruits, as well as consumer trends and recipes with nuts and dried fruits.
- Access 410,000+ statistics on crops, imports, exports and consumption since 1995, including an Annual Global Statistical Review.
- World Map of Trade Flows—a quick and clear view of the main nut and dried fruit trade flows around the world.
Dear Friends,

It is my pleasure to present the 2018/2019 Annual Report of the International Nut and Dried Fruit Council’s activities.

As I approach my last month as your INC Chairman, I reminisce of your management’s accomplishments for the past four years:

• Established the Business Integrity Committee.
• Developed global Academia courses as an Executive program for our members.
• Staffed internal professionals to “fight” on our behalf Nuts and Dried Fruits of unfair trade practices and unreasonable restrictions in Brussels and Washington D.C.
• Increased our membership by 25%, representing over 77 countries.
• Annually investing over 1,000,000 Euros in Research and Development, Scientific and Technical, and through our dissemination we are potentially reaching over 40 million consumers about the health benefits of Nuts and Dried Fruits.
• Increased our annual Congress participation by 50%.
• Approved a “Global” INC Nut and Fruit purchase contract to standardized terms and conditions of the transactions between sellers and buyers, with strict arbitration and conditions of membership in the INC.
• We are looking into the “future” with a multi-year major Mega-Trends that will analyze our commodities in consumer acceptance and production acreage to meet Supply and Demand in the coming decades.

As you can see, you have a very dynamic team managing our commodities for the future of our industry!

In February we launched the second session of the Academia Program on Nuts and Dried Fruits, designed by top experts from the world’s most prestigious institutions and companies. Consisting of online and on-site courses, it provides a broad picture of the industry, and in addition it allows students the chance to visit orchards and factories of top companies and immerse themselves in case studies led by professors from prestigious business schools.

Finally, I would like to highlight the INC Pavilions in Gulfood Dubai and in SIAL-Paris have become a must visit in the world’s largest food shows and the “place to be” in the nut and dried fruit industry.

On behalf of the Board of Trustees and the Executive Committee, I would like to thank the members, sponsors and contributors for your continued trust and support in the INC. It has been my pleasure serving as your Chairman!

Wishing you good harvests, good selling and continuing dedication to improving people’s lives!

All My Best,

Mark A. Mariani
Priorities for 2019/2020

Goretti Guasch
Executive Director

In 2018 we started to work with five new strategic priorities which will allow the INC to consolidate the main projects that we have been working on for several years and to put in place new initiatives aimed at expanding our scope.

At INC, we focus on our mission statement: “To stimulate and facilitate sustainable growth in the global Nut and Dried Fruit Industry.” With this in mind, the INC continues to monitor trade issues that may affect the international nut and dried fruit market, including tariff and non-tariffs barriers. To this end, we strive for direct and proactive communication with the governments, sending position letters and fighting for the interest of the industry to maintain the status quo of customs duties on tree nut and dried fruit products. In addition, we are building a database of tariffs and we are monitoring the most relevant developments on trade agreements.

Likewise, we keep monitoring regulatory changes and cooperating with institutions on global economic policy-making, as the trusted voice in the discussions on food safety, contaminants, pesticides, import controls and agricultural quality standards. Furthermore, we are working with a prestigious international legal firm to develop the INC Contract, which covers the specific needs of the nut and dried fruit sector and intends to help INC members avoid contractual issues. The INC Contract is meant to deal with the main concerns that may arise during international operations by providing certainty about the overall security of international operations, and by simplifying the whole sale and purchase process through clear binding terms and conditions for both parties.

In addition, in April 2018, we started to issue a newsletter for health professionals, targeting doctors, nutritionists and health professionals. This quarterly publication features news, events and INC Grants Program updates, with special focus on the latest research findings.

Allergies are one of our lead topics for the INC strategic plan. In this direction, an Allergens Toolkit has been published as a new information resource for food operators and manufacturers that provides an introduction to nut-allergy facts, labeling rules and key aspects of allergen management. Also, an Allergy Dietitian will be one of the keynote speakers in our 2019 annual congress to inform the industry on allergy management practices, novel treatments and new practices around the world regarding nut allergies.

Finally, we will continue to implement the multi-year Megatrends Project. As part of the new strategic priorities for 2018-2023, the INC is identifying, with the help of the Statistics Committee, the main nut and dried fruit current and projected production, industry structure and sustainable development. In January 2018, we started gathering information about production; bearing and non-bearing planted hectares and new plantings, in order to provide 10-year forecasts of production data; the number of people involved in the industry; agricultural water management; and the use of by-products and renewable energies throughout the supply chain. The ultimate goal is to put together a database for industry expert to assess the sustainable growth of the nut and dried fruit industry.

We will keep up the hard work and dedication to the members, to continue providing our services and working towards the sustainable growth of the nut and dried fruit industry.

Thank you for your ongoing support.

Goretti Guasch
Board of Trustees: Formed by recognized leaders of the nut and dried fruit industry who volunteer their time and expertise on matters that benefit the entire industry.

- Mark Mariani, Mariani Packing Company, USA - Chairman
- Michael Waring, MWT Foods, Australia - 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy - 2nd Vice Chairman
- Asadollah Asgaroladi, Hassas Export Co. Ltd., Iran
- Bill Carriere, Carriere Family Farms, USA
- Karsten Dankert, Max Kiene GmbH, Germany
- Joan Fortuny, Borges Agricultural & Industrial Nuts (BAIN), Spain
- Giles Hacking, CG Hacking & Sons Limited, UK
- Cheng Hung Kay, CHK Trading Co. Ltd., China, Hong Kong
- Mark Jansen, Blue Diamond Growers, USA
- Zhou Jinkui, Fen Yang Reell Food Co., Ltd., China
- Ashok Krishen, Olam International Limited, Singapore
- Jack Mariani, Mariani Nut Company, USA
- Stephen Meltzer, Balcorp Ltd., Canada
- Russell Mooney, Intersnack Procurement B.V., Netherlands
- Pratap Nair, Vijayalaxmi Cashew Company, India
- Osman Oz, Aegean Exporters Associations, Turkey
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain - Honorary President
- Hasan Sabir, Sabirlar Findik Ihracat Ltd. Sti., Turkey
- Harry Sinclair, Treehouse Foods, USA
- Berton Steir, The Wonderful Company, USA
- Dick Walden, The Green Valley Pecan, USA
- Chen Ying, China Chamber of Commerce, China
- Cuneyd Zapsu, Balsu A.S., Turkey
Observers: Composed of recognized leaders of the nut and dried fruit industry who work closely with the members of the Board of Trustees.

- Ahmet Bilge Anbarlilar, Balsu A.S., Turkey
- Mohsen Boujbel, Boudjebel SA VACPA, Tunisia
- Riccardo Calcagni, Besana Group, Italy
- Antonio Pont Jr., Crisol de Frutos Secos SAT, Spain
- Michael Rund, Bösch Boden Spies, Germany

Executive Committee: Formed by the Chairman, Vice-Chairmen and a maximum of nine more members of the Board in total, and the Executive Director, representing the regions and products of the INC members.

- Mark Mariani, Mariani Packing Company, USA - Chairman
- Michael Waring, MWT Foods, Australia - 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy - 2nd Vice Chairman
- Giles Hacking, CG Hacking & Sons Limited, UK - Board Member
- Ashok Krishen, Olam International Limited, Singapore - Board Member
- Jack Mariani, Mariani Nut Company, USA - Board Member
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain - Board Member
- Berton Steir, The Wonderful Company, USA - Board Member
- Cuneyd Zapsu, Balsu A.S., Turkey - Board Member
- Goretti Guasch - Secretary General and Executive Director

Ambassadors Committee: This committee deals with issues related to new members, fees and dues, and establishes the best relations with all nut and dried fruit boards and officials of the different countries.

- Stephen Meltzer, Canada - Chairman
- Oscar Vergara, Argentina
- Chris Joyce, Australia
- Michael Waring, Australia
- Frank Vaerewijck, Belgium
- José Eduardo Camargo, Brazil
- Francisco Assis, Brazil
- Ranjeet Wallia, Canada
- Siegfried von Gehr, Chile
- Cheng Hung Kay, China, Hong Kong
- Chen Ying, China
- Richard Monnier, France
- Alexis Sumar, France
- Jan Vincent Rieckmann, Germany
- Catherine Balamoutsos, Greece
- Raju Bhatia, India
- Pratap Nair, India
- Pankaj Sampat, India
- Asadollah Asgaroladi, Iran
- Vitali Levi, Israel
- Yossi Mussafi, Israel
- Alessandro Annibali, Italy
- Hidemitsu Honda, Japan
- Kazuo Julian Tagawa, Japan
- Mbugua Ngugi, Kenya
- Abdellah Foud Abdellah, Kuwait
- Hani Akzam, Lebanon
- Parissa Rafii, Luxembourg
- Fiodor Slanina, Moldova
- Khalid Bennani, Morocco
- Jelle van de Sandt, Netherlands
- Kees Blokland, Netherlands
- Christopher Harlem, Norway
- Oliver Sio, Philippines
- Rustam Khushe, Russia
- Amit Khirbat, Singapore
- Carl Henning, South Africa
- Alex Whyte, South Africa
- Miquel Borràs, Spain
- Stefan Boden, Sweden
- Varee Phonphaison, Thailand
- Ahmed Boujbel, Tunisia
- Ahmet Goksan, Turkey
- Hasan Sabir, Turkey
- Muzaffer Taviloglu, Turkey
- Jafar Moallem, UAE
- Roby Danon, UK
- Marc Rosenblatt, USA
- Jeffrey Sanfilippo, USA
- Steve Sousa, USA
- Jim Warner, USA

Senators: Senators have performed exceptional services towards achieving the aims of the INC in the past. Currently, they are entitled to participate in Board meetings, sharing knowledge and experience with the members of the Board.

- Hubert Berrebi, France
- Helmut Dankert, Germany
From May 21 to May 23, Seville became the spotlight of the global Nut and Dried Fruit Industry. The sublime Spanish city was home for 1,508 participants, a record attendance. Three days of intense activity provided delegates with inspiring keynote speeches, informative round tables and scientific and nutrition seminars. Industry leaders presented the latest updates of the sector, crop forecasts, insights and analyses of the global nut and dried fruit market. In addition, Seville saw the largest ever exhibition area with a record number of companies exhibiting at the congress.

Keynote speakers included the Internet biographer Dr. Andreu Veà who focused his speech on the “heroes” who contributed to the creation of the Internet as well as on the technology applications with a real impact on people and industries; while the internationally renowned legal expert Antonio Garrigues Walker, examined the causes for the rise of populism and its impact on the global economy.

Moreover, leading researchers Prof. Jordi Salas-Salvadó, and Dr. Ramon Estruch, Coordinator of the PREDIMED Study Group, presented the latest findings on health and nut and dried fruit consumption in the Nutrition Seminar. Mr. Pino Calcagni reported in the Scientific Seminar, the activities of the INC Scientific and Government Affairs Committee and the new INC project on Megatrends, and guest speaker Dr. Alison Blackwell, from APS Biocontrol Ltd, talked about the use of bacteriophage to manage microbial contaminants in dried fruits.
INC Awards

The Corporate Golden Nut Award was delivered to Borges Agricultural and Industrial Nuts, as a company leader in industrial processing and marketing of almonds, walnuts, pistachios and other nuts; the Individual Golden Nut Award was given to Mr. Giles Hacking for his invaluable support to the nut and dried fruit sector; the PREDIMED Study Group received the Award for Excellence in Research; Michelin star Chef Joan Bosch received the Award for Excellence in Gastronomy, and Setton Pistachio of Terra Bella Inc. won the Innovation Award with 100% All Natural Pistachio Chewy Bites, Pistachio + Blueberry Infused Cranberry.

Congress App and Online Meeting Point

In March 2018, the INC launched a mobile App focused on the XXXVII World Nut and Dried Fruit Congress in Seville. The Apps’ content included the Congress program plus information on speakers, evening social events, INC Awards, Online Meeting Point, sponsors and much more. Users were also able to download presentations and videos from the round tables, seminars and keynote presentations. In addition, a brand-new feature, the Q&A, was implemented to allow participants to interact during the Congress sessions by asking questions which were displayed on the screen for the panel members to answer. The tool obtained a total of 834 installations (624 from iOS and 210 from Android).

For INC XXXVIII Congress held in Boca Raton, Florida, in May 2019, a new edition of the App has been launched. The tool contains all the features that it already offered in previous years, as well as the interactive Q&A.

The Online Meeting Point is also available through the official App, providing delegates with a better experience in terms of usability and sociability. And as a novelty of this year’s edition, users can edit themselves their profile data information and change their profile picture.
### INC Awards

#### Corporate and Individual Golden Nut and Dried Fruit Awards

<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
<th>Organization</th>
<th>Person(s)</th>
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<td>Ferrero S.p.A., Italy</td>
<td>Jack Axer, USA; Alix J. Renshaw, United Kingdom</td>
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<td>Istanbul, Turkey</td>
<td>Dr. Pier Luigi Nobile, Italy; Prof. Dr. Mahmut Ayfer, Turkey</td>
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<td>1987</td>
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<td>Paris, France</td>
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<td>Munich, Germany</td>
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<td>ION S.A., Greece</td>
<td>Paul Graf, Switzerland</td>
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#### Honorary Golden Nut and Dried Fruit Awards

- **1985**: Juan Carlos I, King of Spain
- **1989**: Mario Soares, President of Portugal
- **1990**: Turgut Özal, President of Turkey
- **1992**: Pete Wilson, Governor of California, USA
- **1998**: Jacques Delors, President EEC Commission Brussels
- **2000**: Daniel Inouye, Senator, USA
- **2001**: Franz Fischler, Commissioner of Agriculture EEC Commission Brussels
- **2003**: Recep Tayyip Erdogan, Prime Minister of Turkey
- **2005**: Helmut Kohl, (Former) Chancellor of Germany
- **2007**: Josep Puxeu, General Secretary of Agriculture and Food, Ministry of Agriculture of Spain
- **2015**: Mevlüt Çavuşoğlu, Minister of Foreign Affairs of Turkey

#### Award for Excellence in Research

- **2012**: Dr. Joan Sabaté, Loma Linda University, USA
- **2013**: Dr. David Jenkins, University of Toronto, Canada
- **2014**: Dr. Emilio Ros, University of Barcelona, Spain
- **2015**: Dr. Jeffrey B. Blumberg, Tufts University, USA
- **2016**: Dr. Penny Kris-Etherton, Pennsylvania State University, USA
- **2017**: Dr. Richard Mattes, Purdue University, USA
- **2018**: PREDIMED Study Group, Spain

#### Award for Excellence in Gastronomy

- **2012**: R. Christopher Christie, Marina Bay Sands, Singapore
- **2013**: Ferran Adrià, El Bulli, Spain
- **2014**: Neil Perry, Rockpool Group, Australia
- **2015**: Mert Seran, Ulus, Turkey
- **2016**: Christopher Kostow, The Restaurant at Meadowood, USA
- **2017**: Bukhara Restaurant, India
- **2018**: Joan Bosch, Can Bosch, Spain

#### Innovation Award

- **2011**: Jas Trading, Netherlands, and Mariani Packing Company, USA
- **2012**: Besana Group, Italy
- **2013**: Toximet Ltd, UK
- **2015**: Tomra, Belgium
- **2016**: Blue Diamond Growers, USA
- **2017**: Qcify Inc, USA
- **2018**: Setton Pistachio of Terra Bella Inc., USA
INC Pavilion in SIAL Paris: The Meeting Point of the Industry

From October 21-25, 2018, SIAL-Paris became the capital of planet food and the INC participated with a new edition of the INC Pavilion. A total of 375 sq m hosted 23 INC members, from 13 countries, offering the highest quality standards, top facilities and services.

Located at a premium position in Hall 5.A “Fruits and vegetables”, the Pavilion became a focal meeting point for the industry. The hospitality area witnessed a succession of meetings, visitors coming and going and industry representatives dealing with prospective customers.

In addition, the INC Cocktail event held on October 24, also allowed co-exhibitors to further strengthen relationships with partners and customers in a more relaxed atmosphere.

Gulfood Dubai 2019: The Trading Hub for Nuts and Dried Fruits

Following the successful experience of 2017 and 2018, the INC attended Gulfood 2019 (February 17-21) with the Middle East edition of the Nuts and Dried Fruits Pavilion. 15 companies from 9 countries joined the INC in the world’s largest annual food and beverage trade show in the region.

The 180 sq m space in Za’abeel Hall 2, Booth E51, saw a continuous flow of visitors and once again, it became a business platform for the Nut and Dried Fruit Industry where hundreds of network and informal meetings were held at the co-exhibitors booths and the hospitality area.

INC’s co-exhibitors created the ideal atmosphere to showcase their products, network and do business with other top industry leaders. The INC Cocktail held on Tuesday, February 19, was again a not-to-be-missed at Gulfood.

Summer Fancy Food New York City: The Place to See and Taste the Future of Food

For the second time, the INC exhibited at the Summer Fancy Food Show held in New York City, the largest specialty food trade event in North America.

From June 30 - July 2, 2018, the INC participated in the event with the aim of providing valuable information about nuts and dried fruits among specialty food’s top manufacturers, buyers and thought leaders.
The INC Publications are aimed at spreading out the word of the Nut and Dried Fruit Industry and providing the INC members with useful and high-value information. The strategy develops through several forms: Nutfruit magazine, newsletters and INC website.

**Nutfruit Magazine**

The INC magazine which is issued in March, July and November was fulfilled with a wide range of topics and content, shaping the voice of the nut and dried fruit industry.

Nutfruit magazine combines market-oriented sections like Business News, Legal Update or the Global Statistical Review, that provide our members with high-value information and keep them updated on the industry’s trends, with informational ones like Health News, INC Congress, INC News and Industry News. Among those, in-depth sections like Gourmet, A Chat with the Industry or Feature Articles add a plus of valuable and high quality content.

**Newsletter**

Three types of newsletters were sent throughout 2018 and 2019 to INC members, stakeholders, industry organizations and health professionals around the world.

The monthly newsletter focuses on informing of the INC’s latest news: updates on the organization’s activities, details of the INC Congress and INC Pavilions, sponsorship opportunities, as well as the latest health research findings and regulations.

The old Cracking the News, transformed into a monthly consumer newsletter, is dedicated to spread the word about the health benefits of nuts and dried fruits through recipes, tips, curiosities, and a selection of news and reports published all over the world.

In April 2018, the INC started to issue a new publication, a scientific newsletter for health professionals, targeting doctors, nutritionists and researchers, among others. The publication is sent 4 times a year: February, April, July and October.

Finally, several special newsletters were also released during the year. They were related to specific subjects that, due to their relevance, interest or timing, deserved an individualized publication.

**Website**

June 2018 saw the launch of the new INC website. Since then, the website has seen an overall increase in visits with a total of 230,996 from June to December, compared to 15,349 throughout the same time period in 2017.

The renovation project was carried out with two initial objectives: to catch the attention of the final consumer and health professionals, and to add two new sections in the industry website - INC Academia and Member Stories. All additions to the new website have helped the INC achieve its main objectives: promoting the health benefits and consumption of nuts and dried fruits worldwide and capturing the attention of potential new members. In this regard, the Become a Member section on the site reached the highest-ranking page on the INC industry website with a total of 17,000 visits in 2018.
Allergens Toolkit

In early 2019, the INC has presented a new information resource for food operators and manufacturers: the Allergens Toolkit, a brochure that provides an introduction to nut-allergy facts, labeling rules and key aspects of allergen management.

The brochure contains practical information and tips including: What are food allergies?, How common are allergies?, diagnosis, labeling, key aspects of allergen management, and new findings and resources.

The toolkit was created by the INC with the collaboration of the American Peanut Council, Dr. Steve L. Taylor and Dr. Joseph Baumert, from the University of Nebraska-Lincoln, Food Allergy Research and Resource Program, and Mr. Carlos de Pablos, from Silliker Ibérica SAU/ Merieux NutriSciences.

Peanut Technical Information Kit

The Technical Information Kit on Peanuts provides a basic understanding on the use of peanuts (characteristics, applications, food safety and quality standards) and targets buyers, importers, processors, manufacturers and the food service industry. The kit include 6 sheets in total, covering: General information, Products, Varieties and forms, Recommendations for processing, storage, packaging and transportation, Quality requirements and food safety parameters, and Standards and grades.
To roll out the 2018 Communication and Digital Media Strategy, numerous actions were carried out to promote INC initiatives, raise awareness about the health benefits of nuts and dried fruits with the aim to increase global consumption and, ultimately, make the voice of the Nut and Dried Fruit Industry heard worldwide.

Press Releases

A total of 8 press releases were sent throughout the year. Content was focused on those INC’s projects with visible impact on society such as the call for research and the global statistical review, and scientific studies that highlighted the health benefits of nuts and dried fruits. The releases were published in international media and achieved a total of 1,833 impacts accumulating a potential audience of over 560 million.

Among these, 2 press releases were produced and sent to promote the INC Congress in Seville before and after the event. A total of 575 impacts via online sources were achieved by these press releases, reaching a potential audience of nearly 127 million people.

Social Media

Social Media activity continued to be a main part of the 2018 Communication Strategy and special efforts were dedicated to the INC’s Social Media profiles, designed to disseminate the organization’s projects among different targets. Overall, social media activity in 2018 has been very successful with all channels obtaining, not only growth in number of followers, but also a significant rise in people interacting with the content.

Facebook is the INC’s most popular social media platform, reaching over 199,000 fans by the end of 2018 and continues to be the fastest growing channel increasing by 15,000 fans in the first quarter of 2019. Likewise, the INC Instagram profile also experienced a high growth seeing a 25% rise in followers since December 2017.

Content

Due to the success seen in 2017, the INC Recipes Plan continued throughout 2018. Three recipes were published each month, one of which including a video recipe. Each recipe was uploaded onto the INC consumer website and also published through social media. All 16 nuts and dried fruits were included through a total of 36 recipes. In 2019, new breakfast recipes will be developed in line with the 2019 Global Dissemination Plan to reinforce the morning consumption of nuts and dried fruits.

Also, the INC created 16 videos, one for each product, summarizing their health benefits and some fun facts. All the videos are being showcased through the INC communication tools. In addition, the INC produced two videos featuring scientific studies with further videos to be produced through 2019.

Online Advertising

In order to continue the growth of INC websites and social media platforms, online advertising, promoted through Google Ads and Social Media Advertising, was focused on five different areas: consumers, recipes, health professionals, industry and INC Academia. Online Advertising proved, once again, to be a key element of the Communications and Digital Marketing Strategy, with over 49% of the visits to the consumer site coming from the activity.
In 2018, the Nuts for Gifts dissemination campaign - launched in 2017 - made a huge step forward and reinforced its core values by incorporating a solidarity element in the “Nuts for a Healthier World” Project. The new campaign was based on the idea that nuts and dried fruits are a gift from nature that everyone should be able to enjoy, including those living in the most disadvantaged regions on the planet.

Solidarity Video Campaign

The campaign consisted of a main video plus 16 video interviews about each nut and dried fruit. The primary objective was to make a call for people to share the main clip on their social media channels to raise awareness of the project.

After its initial phase, and the video reaching over 40,000 shares, INC partnered with global NGO Save the Children to turn the shares into physical aid. With the aim to raise the same amount of money as shares, every share of the video would be equal to one euro, which is the cost of three nutritional packs, the treatment for one child for one day.

Consequently, the INC reached out to its members to join the initiative and with their collaboration, by the end of February 2019, the INC exceeded its original goal and raised €47,800 for the cause. The campaign’s main video has been shared over 43,000 times, with other content totaling over 2 million views. While the campaign visibility through all media and platforms has reached an estimated 43 million people.

Online Promotion

Nuts for Gifts website was adapted to embrace the new solidarity phase of the project and to encourage visits to share the video, as well as to highlight the benefits of nuts and dried fruits. At the campaign’s end, the website reached a total 85,053 visits of which advertising was responsible for 34% - with Google Display Ads being the most popular form of advertising gaining over 4.7 million views. Top 5 countries for website visits were: Bangladesh, India, Spain, United States and Afghanistan.

Influencers

To expand the project further, an influencer campaign kicked-off in June after the launch of the main video at the INC Congress in Seville. From existing relationships built throughout the 2017 Nuts for Gifts campaign, plus new ones established in 2018, 49 influencers mainly specializing in healthy eating and nutritional content, helped to spread the word. Results are as follows:

- **Collaborations**: 49
- **Publication Reach**: 13,567,090 followers
- **Number of Interactions**: 22,845
- **Top 3 Regions**: Europe, America, Asia
- **Main Categories**: Nutrition and Healthy Eating

On-site Promotion

As part of the program’s promotion, the Nuts for a Healthier World Campaign was shown at five events:

1. **INC XXXVII World Nut and Dried Fruit Congress (Sevilla, Spain):** May 21-23, 2018. 1,500+ participants from 60+ countries attended the Congress.
2. **Nutrition 2018 (Boston, USA):** June 9-12, 2018. Over 2,500 attended the exhibition.
5. **Gulfood (Dubai, UAE):** Feb 17-21 2019. Over 100,000 attended the fair.

The 2019 Dissemination Plan will aim to promote the morning consumption of nuts and dried fruits as a healthy breakfast option and own the idea of them as a great start up for the day ahead.
In 2018/2019, INC closely monitored the following issues:

• **Pesticides:**
  - **Iprodione.** In November 2017, the European Commission (EC) withdrew the authorization of iprodione in the EU by March 5, 2018, on the basis of the findings reported by the European Food Safety Authority (EFSA). To support the request for a sufficient transitional period, INC collected data on iprodione residues detected in nuts and dried fruits. Unfortunately, the Maximum Residue Limits (MRL) for iprodione were reduced in January 2019 without transition period. The Regulation 2019/38 of 10 January 2019 established a MRL of 0.01* ppm for iprodione in almonds, apricots, plums, grapes and cranberries (*indicates lower limit of determination) that shall apply from July 31, 2019.

• **Contaminants:**
  - **Ochratoxin A (OTA).** The EC is discussing the possibility of establishing OTA maximum limit (ML) for nuts and dried fruits. Currently, the only ML in place is the one for dried grapes at 10 ppb. The EC requested the EFSA to provide an updated exposure assessment taking into account the recent occurrence data and the comprehensive food consumption database. The discussions as regards possible ML of OTA are for the time being suspended until the outcome of the EFSA’s assessment (expected by the first half of 2019).

The INC Scientific and Government Affairs Committee closely monitors scientific and technical issues that may be susceptible of having a negative impact on the nut and dried fruit sector. As the international source of information, INC makes every possible effort to be updated on the latest issues that are most relevant for the industry.

The Official Voice of the Sector

The INC is recognized as the official representative of the global nut and dried industry by international and supranational institutions such as Codex Alimentarius, Food and Agriculture Organization of the United Nations, World Health Organization, World Trade Organization, United Nations Economic Commission and European Commission, among others. As the official voice of the global trade and production of nuts and dried fruits, INC participated in the following activities in 2018/2019.

• **Codex Alimentarius.** INC participates as Official Observer in different electronic working groups (EWG) and sessions. In 2018/19, INC participated in the following Codex Alimentarius activities:
  - Codex Committee on Pesticide Residues (CCPR)
    - EWG on Priorities: to review current nominations, schedules and priority list of pesticides for consideration in the next session of the CCPR.
    - EWG on the International Estimated Short-term Intake (IESTI) equations: to review advantages and challenges of the current IESTI equations and to prepare a document intended to gather relevant information on bulking and blending.
  - Codex Committee on Processed Fruits and Vegetables (CCPFV)
    - EWG on Dried Fruits: to draft a General Standard for Dried Fruits, including annexes for raisins, dates and dried apricots.
• **UNECE.** INC collaborates with the United Nations Economic Commission for Europe (UNECE) in the review of Agricultural Quality Standards for tree nuts and dried fruits. In 2018, INC participated in the 65th Session of the Specialized Section on Standardization of Dry and Dried Produce and in the 74th Session of the Working Party on Agricultural Quality Standards.

**UNECE Standards adopted in 2018:**
- New Standard for Dried Bananas
- Revised Standard for Prunes (1-year trial period)
- New Standard for Dried Ripe Papayas (1-year trial period)
- New Standard for Dried Melons (1-year trial period)

In addition, INC participated in following events hosted by the UNECE:
- In May 2018, INC together with the UNECE and Besana Group organized a practical workshop to discuss and test the sampling and inspection practices of the UNECE Sampling Plan for Tree Nuts and Dried Produce. The workshop took place in the Besana facilities, Naples. The results of the workshop were discussed during the 65th Session of the Specialized Section in June 2018.
- In June 2018, INC participated in the Symposium “Nuts and Dried Fruits for a Sustainable Future” held in Geneva, Switzerland, where Mr. Pino Calcagni, INC Vice Chairman and Chairman of the Scientific and Government Affairs Committee, gave a general overview of the trade and sustainable production of nuts and dried fruits.
- In September 2018, INC participated in the Workshop on Agri-Food Supply Chains in Cross-Border Trade of Nuts and Dried Fruits, held in Tashkent, Uzbekistan. Mr. Calcagni participated in two sessions. The first day, he gave a presentation about quality requirements and controls and the importance to meet retail specifications and standards for accessing the leading trade chains and niche markets. The second day, he spoke about markets and latest developments in nut and dried fruit industry.

**2018 Import Border Rejections**
INC monitors food safety alerts not only in Europe but also in USA, Australia and Japan, analyzing the trends and monitoring the causes and origins.

**EU-RASFF.** The European Union’s Rapid Alert System for Food and Feed (RASFF) notifications for nuts and peanuts for feed increased by 5% and 127%, respectively, from 2017. On the contrary, notifications for dried fruits decreased by 12%. The presence of aflatoxins remained as the main reason for notifying nuts and peanuts for feed. Ochratoxin A became the main reason for notifying dried fruits. The most notified edible nuts were peanuts, followed by pistachios and hazelnuts. Dried figs, dried grapes and dried apricots were the most notified dried fruits.

**USA.** Notifications for edible nuts remained stable with respect to 2017. The edible nut with the higher number of notifications was the peanut (10 not.). Misbranding (33% of total) was the main reason for notifying edible nuts, followed by aflatoxins (24%) and filthy (13%). On the other hand, the number of notifications for dried fruits increased by 24%, reaching 79 notifications. Raisins were the most notified dried fruits (36 not.) followed by dates (18 not.) and prunes (13 not). As in 2017, filthy (42%), pesticide (20%) and misbranding (15%) were the main reasons for notifying dried fruits.

**Japan.** Notifications for edible nuts and dried fruits slightly decreased by 6% with respect to 2017 (from 136 to 128 not.). Almond was the most notified nut (46 not.), instead of peanuts as in the previous years. Peanuts ranked the second most notified nuts (33 not.), followed by pistachios (16 not.) and dried figs (14 not.). The main reason for notifying edible nuts and dried fruits was still the presence of aflatoxins (93% of total).

**Australia.** Australia published 45 notifications for nuts and dried fruits in 2018 -double than last year, and the highest number of the last eight years. The most notified nuts were peanut products, with 20 notifications, followed by peanuts, with 11 notifications. The main reason for notifying edible nuts and dried fruits was the presence aflatoxins (82% of the total).

**2018 RASFF Total Notifications for Product and Country of Origin**

- Peanuts (Argentina) 9%
- Pistachios (USA) 7%
- Peanuts (China) 6%
- Dried figs (Turkey) 6%
- Peanuts (Egypt) 6%
- Hazelnuts (Azerbaijan) 3%
- Almonds (USA) 6%
- Dried grapes (Turkey) 5%
- Dried apricots (Turkey) 5%
- Hazelnuts (Turkey) 6%
- Peanut feed (Gambia) 3%
- Pistachios (Turkey) 3%
- Others 30%
- Pistachios (Iran) 5%
The INC World Forum for Nutrition Research and Dissemination is the international umbrella for scientific research and dissemination related to health, nutrition, nuts and dried fruits. It defines research priorities and promotes research and dissemination grants.

- Prof. Jordi Salas Salvadó, Rovira i Virgili University, Spain - Chairman
- Mr. Antonio Pont, Spain - INC Executive Committee Member Representative

Academic Honorary Committee:
- Dr. David Jenkins, St. Michael’s Hospital, Canada
- Dr. Penny Kris-Etherton, The Pennsylvania State University, USA
- Prof. Gerhard Rechkemmer, Max Rubner-Institut, Germany
- Dr. Emilio Ros, Hospital Clinic de Barcelona, Spain
- Dr. Joan Sabaté, Loma Linda University, USA

Evaluating Committee:
- Dr. Cesarettin Alasalvar, TUBITAK Marmara Research Center, Turkey
- Dr. Josefina Bressan, Federal University of Viçosa, Brazil
- Prof. Catherine Itsiopoulos, La Trobe University, Australia
- Dr. Karen Lapsley, Almond Board of California, USA
- Dr. Denis Lairon, Joint Research Center for Cardiovascular Diseases and Nutrition, INSERM INRA Aix Marseille University, France
- Dr. Girish B. Maru, Advanced Center for Treatment Research and Education in Cancer, India
- Ms. Maureen Ternus, INC Nutrition Research and Education Foundation, USA

The objectives of the Forum are to promote research and dissemination projects, to disseminate the latest research findings worldwide, and to promote calls for specific research and dissemination projects. The Forum recommends research priorities, advises on scientific awards and monitors three annual calls supported by the INC: the Call for Research Projects, the Call for Promotion and Dissemination Projects and the Call for Open Access Studies.

**Call for Research Projects**

In 2018, INC approved to fund the following research project, which had been submitted to the annual Call for Research Projects (€300,000) with due date for submission January 31, 2018. The call was open for public and private institutions, as well as not-for-profit organizations, with the overall objective to promote clinical, epidemiological, basic and strategic research that may contribute to enhance the understanding of the health effects of nut or dried fruit consumption.

Grant recipient:
- Clinical study “Optimising gut health: physiological, microbiological and metabolomic effects of dried fruit”. Principal Investigator: Prof. Kevin Whelan, King’s College London, UK.

From the 14 scientific studies funded by the INC since the first Call launched in 2013, a total of 10 studies have already been completed and 6 of them have been published in scientific journals.

Publications:


In addition, INC created a series of animated videos (available in YouTube) aimed at explaining the studies and disseminating the findings among consumers.

Call for Promotion and Dissemination Projects

The INC approved to fund the following projects in 2018. The projects had been submitted to the annual Call for Promotion and Dissemination Projects (£50,000) launched in November 2017, with due date for submission January 31, 2018. The Call was open for public and private institutions, as well as not-for-profit organizations, with the objective to build consumer demand for nuts and dried fruits.

Grant recipients:

• Australian Nut Industry Council (ANIC) on behalf of the Nuts for Life Program. Project: “Dissemination of results from the secondary analysis of nut consumption in the 2011–13 Australian Health Survey”.

• Nucis Italia. Project: “Nuts and the new dietary styles”.

Over the last six years, the INC has funded research and dissemination grants for nearly 2.8 million euros.

Call for Open Access Studies

On March 15, 2018, the INC launched its first ever Call for Open Access Studies (£18,000), the objective of which is to disseminate the health benefits of nut and dried fruit consumption as widely as possible, through the payment of the Open Access fees of scientific studies, so that the articles are freely available online.

To date, the INC has funded the Open Access publication of the following studies:


The 2019 Call for Open Access Studies was launched on January 11, 2019, and will be open the whole year until the budget (£18,000) has been expended.

Nutrition 2018

The INC attended from June 9 to 12 the Nutrition 2018 congress in Boston, USA, which gathered about 2,500 attendees, mainly scientists, food scientists and clinicians, as well as leaders from international nutrition societies, industry professionals, community health educators and nutrition journalists.

INC’s participation served a double purpose. It was the first time for the “Nuts for a Healthier World” campaign to be displayed. The first edition of this congress was also a great platform for INC to gain visibility among health professionals and nutritionists. The INC made the most of the event in Boston to promote its funding opportunities.

Statistics and Megatrends

The Statistics Committee supports the INC, as the premier source of information for the nut and dried fruit industry, in gathering and reviewing statistical data that is relevant, timely and reliable for its distribution to the industry, governments and the general public. The Committee is composed of industry leaders and experts and organized in sixteen working groups.

- Mr. Pino Calcagni, Besana Group, Italy - Chairman

Leaders of the Working Groups:
- Almonds: Ms. Julie Adams, Almond Board of California, USA
- Brazil Nuts: Mr. Pino Calcagni, Besana Group, Italy
- Cashews: Mr. Amit Khirbat, Olam International, Singapore
- Hazelnuts: Mr. Ahmet Bilge Anbarlilar, Balsu Gida, Turkey
- Macadamias: Mr. Jolyon Burnett, Australian Macadamia Society, Australia
- Pecans: Mr. Bruce Caris, The Green Valley Pecan, USA
- Pine Nuts: Ms. Chen Ying, Chamber of Commerce, China
- Pistachios: Mr. Mike Hohmann, The Wonderful Company, USA.
- Walnuts: Mr. Jinkui Zhou, Fen Yang Reell Food Co., Ltd., China.
- Peanuts: Ms. Chen Ying, Chamber of Commerce, China
- Dates: Mr. Ahmed Boujbel, Boudjebel, Tunisia
- Dried Apricots: Mr. Osman Oz, Aegean Exporters Association, Turkey
- Dried Cranberries: Mr. Lee Doleman, Ocean Spray, USA
- Dried Figs: Mr. Osman Oz, Aegean Exporters Association, Turkey
- Dried Grapes: Mr. Osman Oz, Aegean Exporters Association, Turkey
- Prunes: Mr. Steve Sousa, Mariani Packing, USA

Online Database

The INC Database provides online data for nut and dried fruit production, stocks, trade and consumption by commodity, country and year through an interactive graphical interface. Already covering nearly 420,000 data, it spans from 1995 up to today. The Database can be accessed through three different search tools:

- The **Dashboard**, where statistics on production, imports, exports and consumption are presented on a world map by product and year.

- The **Advanced Search**, which allows the users to search annual statistics by product and country on production, stocks, trade and consumption through customizable charts and tables.

- The **Trade Data** is a useful tool to break down annual exports and imports by country of origin and destination and can be visualized in a world map, charts and tables at the same time.
World Trade Maps

In April 2019, the INC will release the bi-annual World Nut and Dried Fruit Trade Maps. This issue will feature two separate maps for Nuts and Dried Fruits, respectively. Available both in a downloadable digital format (through INC website) or as printed posters, the maps allow to identify the major world nut and dried fruit trade flows at a glance as the top origin and destination countries, as well as the traded volumes of each commodity, are easily visualized in a world map.

Statistical Yearbook

The INC Statistical Yearbook 2018/2019 was published in March 2019, providing an overview of the last 10 years trends on nut and dried fruit production, trade and consumption.

Following the growing trend observed during the last decade, overall tree nut production continued to grow in the 2018/2019 season, adding up to around 4.45 million metric tons. Almonds were the most produced tree nut, accounting for 28% of the world production, followed by walnuts (20%), cashews (19%), pistachios (17%) and hazelnuts (10%). In turn, exports increased at an average rate of approx. 61,600 MT/year, amounting to 2.23 million metric tons in 2017. Likewise, tree nut estimated consumption increased at an average pace of around 195,000 MT per year, totaling 4.36 million metric tons in 2018/19.

Global peanut production was estimated at circa 37.5 million metric tons in 2018/19. China was the leading producing country, accounting for 41% of the world production. India (13%), Nigeria (9%), the USA (7%), Indonesia (3%) and Argentina (3%) were the following major producers. Global exports of shelled peanuts in 2017 were increased by 15% to ca. 2.4 million MT from the previous year. Correspondingly, the estimated consumption reached 44.2 million MT.

World production of dried fruits in the 2018/19 season amounted to over 3.1 million metric tons. Over the last 10 years, dried grapes (raisins, sultanas and currants) have been the most produced dried fruit, accounting for 41% of the world share in 2018/19. In turn, table dates represented the following 36%. Prunes, dried apricots, sweetened dried cranberries and dried figs accounted for the remaining 23%. Likewise, exports rose steadily at an average rate of around 51,800 MT/year, adding up to ca. 2.3 million metric tons in 2017. Dried fruit consumption totaled over 3.2 million MT in 2017 as it grew around 90,700 MT annually throughout the prior 10 years.

Megatrends

As part of the new strategic priorities for 2018-2023, the INC is identifying, with the help of the Statistics Committee, the main nut and dried fruit current and projected production, industry structure and sustainable development. More specifically, the INC is gathering information about production; bearing and non-bearing planted hectares and new plantings -in order to provide 10-year forecasts of production data; the number of people involved in the industry; agricultural water management; and the use of by-products and renewable energies throughout the supply chain. The INC is collecting and putting together a database for industry experts to assess the sustainable growth of the nut and dried fruit industry.
February 2018 saw the launch of the INC Academia, and specifically its first course: the Executive Program on Nuts and Dried Fruits. This first edition was launched on February 1, 2018, and was closed on May 19, 2018, with a total of 42 students from 19 countries.

The objective of this educational program is to learn the basics of the nut and dried fruit industry, main characteristics, applications and information resources. It combines a 10-unit online course of approximately 50 hours, and a final 3-4 day on-site experience (10+ hours of preparatory tasks & reading material) to learn through case studies, network and visits to orchards and factories.

The content of the online course was created by top experts from the world’s most prestigious institutions and companies. The program consists of 10 units covering key aspects of the nut and dried fruit sector, including soil and climate, varieties and uses, nutrition facts, processing, food safety and quality standards, production, trade and consumption trends, arbitration and negotiation.

The on-site course took place on May 17-19, 2018, in Seville, Spain, just before the INC Congress. The course allowed students to network, learn through case studies and visit orchards and factories: La Fortaleza, El Carquí (Borges) and Almendras de Almería (Maseto Technologies). The case studies were presented by Prof. Dr. Kandarp Mehta and Prof. Dr. Miguel Mediavilla, from the prestigious IESE Business School -the IESE Executive Education and Custom Programmes have been ranked best in the world three years running (2015, 2016, 2017 and 2018) by The Financial Times.

"The course provided a broader extending on the nuts and dried fruits business. It broadens the knowledge about the products which we are trading, by providing information about the background of the products, preparations and market trends."

Mr. Joren Groot,
Nutland NV, Netherlands

"A very clear and elaborate basic overview of all aspects of the nuts and dried fruits industry. Interesting and challenging content for people who are already in the business and would like to expand their knowledge, or a good starting point for newcomers to the industry."

Ms. Vania Van Hove,
Molenbergnatin NV, Belgium

The Academic Committee advises the INC on the good development of the Academia.

- Mr. Joan Fortuny, Spain - Chairman
- Mr. Antonio Pont, INC Executive Committee Member Representative

Industry members:
- Mr. Pino Calcagni, Besana Group, Italy
- Mr. Ashok Krishen, Olam International, Singapore
- Mr. Bill Morecraft, Blue Diamond Growers, USA
- Mr. Hari Nair, Western India Cashew Company, India
- Mr. Vincent Rieckmann, August Töpfer and Co., Germany
- Mr. Jeffrey Sanfilippo, John B. Sanfilippo and Son, USA
- Mr. Steve Sousa, Mariani Packing, USA
- Ms. Chen Ying, Chamber of Commerce, China

Academic members:
- Prof. Dr. Uygun Aksoy, Consultant, Turkey
- Dr. Cesarettin Alasalvar, TUBITAK Research Center, Turkey
- Dr. Antonio Logrieco, Institute of Sciences of Food Production CNR, Italy
- Prof. Jordi Salas-Salvadó, Rovira i Virgili University, Spain
- Prof. Linda Tapsell, University of Wollongong, Australia

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Online Course

10-unit course (50 hours) with reading materials, video tutorials, self-assessment tests and a dossier, summary of the course.

1. **Origin and description:** Introduction to the long history of nuts and dried fruits, their description and physiology.

2. **Soil and climate:** Which climates nuts and dried fruits are adapted to, soils, water demand and how climate conditions may affect the crops.

3. **Varieties and uses:** An overview of the main varieties and geographical distribution of species, as well as traditional and recent products and uses.

4. **Nutrition facts:** A review of the nutritional value and evidence-based health benefits of nut and dried fruit consumption.

5. **Processing:** Main processing operations that can take place during and after harvest, including shelling, drying, sorting and allergen management.
   - 5.1 Harvest
   - 5.2 Storage
   - 5.3 Fumigation with phosphine
   - 5.4 Shelling
   - 5.5 Blanching
   - 5.6 Drying
   - 5.7 Sorting technologies
   - 5.8 Vacuum packing
   - 5.9 Pasteurization
   - 5.10 Frying and dry roasting
   - 5.11 Flavoring
   - 5.12 Multthead weighing and bag forming
   - 5.13 Modified Atmosphere Packaging
   - 5.14 Packaging materials
   - 5.15 Contaminant detection and removal
   - 5.16 Allergen management

6. **Food safety and quality standards:** Review of the essential aspects of food safety, quality standards and best practices.

7. **Production, trade and consumption:** Global review of industry statistics, including production, trade and consumption volumes.

8. **Consumption trends:** Understanding purchase behavior and capturing opportunities from emerging trends.

9. **Arbitration rules:** Overview of arbitration rules, procedures and tribunals, as well as defaults and contract related issues.

10. **Negotiation:** Essential strategies and skills for successful negotiations.

On-Site Course

The next on-site course will take place in California, from May 18 to 21, 2019, just before the 38th World Nut and Dried Fruit Congress in Boca Raton. Students will visit the orchards and factories of top companies of the sector: Mariani Packing, Blue Diamond Growers, Carriere Family Farms, Vann Brothers, Vann Family Orchards and Yolo Hulling & Shelling and Strain Ranches, and will learn through case studies by professors from prestigious business schools. The case studies will be held at UC Davis - one of the top colleges of agricultural and environmental sciences in the world.

<table>
<thead>
<tr>
<th>Saturday, May 18</th>
<th>Sunday, May 19</th>
<th>Monday, May 20</th>
<th>Tuesday, May 21</th>
<th>May 22</th>
<th>May 23-25</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Morning</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration</td>
<td>San Francisco</td>
<td>Bus transfer</td>
<td>Bus transfer</td>
<td>Bus transfer</td>
<td>Free day</td>
</tr>
<tr>
<td>Visit to orchards (pistachios)</td>
<td>Strain Ranches, Arbuckle</td>
<td>Visit to processing plant (dried fruit)</td>
<td>Mariani Packing Company, Vacaville</td>
<td>Visit to processing plant (almonds)</td>
<td>Blue Diamond Growers, Sacramento</td>
</tr>
<tr>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch at BDG</td>
<td>Lunch</td>
<td>Lunch</td>
<td></td>
</tr>
<tr>
<td><strong>Afternoon</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visit to orchards (almonds)</td>
<td>Blue Diamond Growers, Chamisal Creek Ranch</td>
<td>Bus transfer</td>
<td>Visit to processing plant (almonds)</td>
<td>Blue Diamond Growers, Sacramento</td>
<td>Case studies (Negotiation)</td>
</tr>
<tr>
<td>Dinner</td>
<td>Dinner</td>
<td>Dinner</td>
<td>Dinner</td>
<td>Dinner</td>
<td>Closing cocktail</td>
</tr>
<tr>
<td>Overnight in Sacramento</td>
<td>Dinner Overnight in Sacramento</td>
<td>Dinner Overnight in Sacramento</td>
<td></td>
<td>Bus transfer</td>
<td></td>
</tr>
</tbody>
</table>

**Notes:**
- UC Davis Foundation Plant Services (FPS)
- Presentation of certificates Thursday, May 23, at 4:00 pm, Estate I Boardroom
Under the framework of the INC Strategic Plan 2018-2023, the INC together with its Business Integrity Committee (BIC) have been working closely with a prestigious international legal firm to develop a contract which covers the specific needs of the nut and dried fruit sector.

This initiative intends to deal with the main concerns that could arise during international operations. The purpose of the INC Contract is to provide certainty regarding contractual issues such as the overall security of international operations, as well as simplifying the whole sale and purchase process through clear binding terms and conditions for both parties.

Developed for the INC member’s best interest, the INC Contract will be a useful tool to help the industry succeed offering many advantages over some industry contracts. To avoid situations of dependence, the Contract sets balanced obligations for the seller and the purchaser. Furthermore, the contract will offer the possibility of settling disputes by choosing arbitration institutions of international reputation.

The Contract will be available to INC members shortly.

The INC closely monitors trade issues that may affect nut and dried fruit trade such as trade barriers, both tariff and non-tariff, and trade agreements.

- **Tariffs.** The INC has collected information about tariffs of nuts and dried fruits of the main import/export countries. Tariff information will be available shortly on the INC website. This will give an overview for exporters of the applicable tariffs in the main import countries of tree nuts and dried fruits.

- **Countervailing duties.** In March 2018, after the announcement of the US additional tariffs on steel and aluminium imports from certain origins, countervailing duties were adopted by the countries affected, who notified tariff hikes on several products originating from the US, including tree nuts and dried fruits (see Table 1).

The INC sent position letters to the governments of the USA, Europe, India and China, to express its deep concern about the additional tariffs, to explain the possible consequences for the industry, and to ask to maintain the status quo of customs duties on tree nut and dried fruit products.

- **Trade Agreements.** In order to facilitate the movement of goods worldwide and opening up foreign markets, countries negotiate bilateral or multilateral Trade Agreements. INC monitors and informs its members about the most relevant developments on Trade Agreements. Some of the most relevant Free Trade Agreements which were signed or entered into force during the last months are summarized in the Figure 1:

<table>
<thead>
<tr>
<th>Incoterm</th>
<th>Trade Agreement</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU-South</td>
<td>First EU-South African Development Community (SADC)</td>
<td>EPA entered into force in some African countries</td>
</tr>
<tr>
<td>US-Canada</td>
<td>US-Mexico-Canada (USMCA)</td>
<td>was signed, updating the previous one which entered into force in 1994</td>
</tr>
<tr>
<td>US-Japan</td>
<td>US-Japan started negotiations on FTAs.</td>
<td>A list of products to be considered included pistachios, dates, raisins and peanuts</td>
</tr>
<tr>
<td>Chile-Brazil</td>
<td>Chile-Brazil signed an FTA which includes sanitary and phytosanitary measures and the elimination of obstacles to trade</td>
<td></td>
</tr>
<tr>
<td>EU-Japan</td>
<td>EU-Japan Trade Agreement entered into force creating the world’s largest open trade zone</td>
<td></td>
</tr>
<tr>
<td>EU-Mexico</td>
<td>EU-Mexico FTA, which was updated, representing a better deal for the agricultural sector</td>
<td></td>
</tr>
<tr>
<td>US-Korea</td>
<td>US-Korea FTA, which entered into force in 2012, was updated, representing a better deal for the agricultural sector</td>
<td></td>
</tr>
<tr>
<td>EU-Norway</td>
<td>EU-Norway FTA entered into force, establishing zero tariffs for agricultural products including cranberries</td>
<td></td>
</tr>
<tr>
<td>EU-Singapore</td>
<td>EU-Singapore signed an FTA which would remove tariffs on certain EU agri-food products</td>
<td></td>
</tr>
<tr>
<td>China-Australia</td>
<td>China-Australia (CHFTA) eliminated tariffs on all tree nuts and dried fruit exported from Australia to China</td>
<td></td>
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</tbody>
</table>

Table 1. Additional tariffs for nuts and dried fruits

<table>
<thead>
<tr>
<th>Country</th>
<th>Tariffs on Specific Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>40% on all tree nuts and dried fruits, 10% peanuts (shelled) and 5% on peanuts (in-shell), roasted peanuts and peanut butter</td>
</tr>
<tr>
<td>EU</td>
<td>25% on peanut butter and 25% on cranberries (March 23, 2021)</td>
</tr>
<tr>
<td>Mexico</td>
<td>20% on cranberries</td>
</tr>
<tr>
<td>India</td>
<td>20% on almonds and walnuts (April 1, 2019)</td>
</tr>
<tr>
<td>Turkey</td>
<td>20% on all tree nuts</td>
</tr>
</tbody>
</table>

Figure 1. The most relevant Free Trade Agreements signed or entered into force during the last months
Global Cashew Council

The main priorities of the Global Cashew Council (GCC) include funding research in order to gather sufficient evidence to support a health claim, getting more reliable industry statistics, improving basic standards for compliance with food safety regulations, and working with international institutions. Through the INC, the GCC represents the united voice of the cashew industry and has access to global data, health research, international dissemination and marketing programs, industry growth and synergies in the cashew value-chain.

Looking back at 2018, the GCC achieved an important milestone in health research with the publication of the study finalist of the GCC-Call for Research Projects. Researchers at the U.S. Department of Agriculture, ARS, Beltsville Human Nutrition Research Center, carried out two analyses:

• One study on the energy content of cashews, which was published in the journal *Nutrients*. Study results showed that the available energy (calorie) content of cashews is 16% lower than that which is typically stated on current food labels and databases in the United States, including the National Nutrient Database for Standard Reference. Whereas the current reported energy value is 163 kcal/serving, USDA researchers found that the metabolizable energy content of a 28 g (1 oz) serving of cashews is 137 kcal.

• And another study on lipids, which was published in *The American Journal of Clinical Nutrition*, concluded that 42 g/day of cashews does not increase LDL “bad” cholesterol levels. The study also observed that adding 42 g of cashews every day to a typical Western diet may help reduce the enzyme PCSK9, and lower PCSK9 concentrations are associated with the removal of LDL “bad” cholesterol from the blood.

Another milestone was launching the website www.cashews.org. The site has been designed with special focus on final consumers, with health & nutrition facts and recipes, but also features specific sections that are directed at health professionals and the cashew industry.

Global Macadamia Council

May 21, 2018, saw the constitution of the Global Macadamia Council (GMC) by industry leaders from Australia, South Africa, Brazil and China. Later on, Kenya, USA, Guatemala, Malawi, Vietnam and Colombia also joined the Council, marking a milestone towards supporting research in the field of health, harmonizing quality standards and defining a key message.

The second GMC Meeting took place in Lincang, China, on October 18, on occasion of the International Macadamia Symposium. Chaired by Mr. Larry McHugh, GMC members from the main macadamia producing countries reviewed the aims and structure of the Council, discussed global supply & demand, future projections, demand stimulation, new market development and the harmonization of standards.

Meanwhile, Dr. Joan Sabaté and his team at Loma Linda University (USA) kicked off the 2-year clinical trial “The Effects of Macadamia Nuts on Cardiometabolic Risk Factors and Adiposity: A Randomized Intervention Study”. Key macadamia-producing countries Australia, South Africa, Kenya, Brazil and Malawi made a substantial financial investment into this research, supported by the INC and INC World Forum for Nutrition Research and Dissemination. The study will evaluate the effect of macadamia nuts on cardiometabolic risk.

Finally, in October, the INC published the Technical Information Kit about Macadamias which provides a basic understanding of using macadamia nuts: characteristics, applications, food safety and quality standards.

Global Hazelnut Project

*Halyomorpha halys*, *Palomena prasina* and *Gonocerus acuteangulatus* are the most harmful hazelnut pests in Europe, Turkey and Georgia; in the United States, it is the *H. halys*. Since a common effort is required to face and successfully solve the problem represented by these pests, the Global Hazelnut Project (GHP) exchanges monitoring data on the incidence of these pests regularly. Chaired by Mr. Pino Calcagni, the GHP is composed of entomologists, researchers and professors from Turkey, Italy, USA, Spain, France and Switzerland who give updates from their respective countries and discuss possible approaches to protect the hazelnut against these bugs.

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4th Meeting of the Spanish Almond and Hazelnut Industry
INC attended the 4th Meeting of the Spanish Almond and Hazelnut Industry in Reus, Spain, on April 24, 2018. Organized by the Spanish Almond Board, around 100 participants shared and discussed views on the challenges and opportunities of the Spanish almond and hazelnut industry, with special focus on the international market, innovation and research. Mr. Pino Calcagni, INC Vice Chairman and Chairman of the Statistics Committee and Scientific and Government Affairs Committee, gave a presentation about the global hazelnut market.

International China Tree Nuts Conference
On August 1-3, INC participated at the International China Tree Nuts Conference in Zhuhai, China. CFNA hosted domestic and international enterprises to exchange views and promote a healthy development of the tree nut industry. In his speech at the opening ceremony, Mr. Pino Calcagni presented a global statistical review of the tree nut industry, and the state of affairs of international trade following the announcement of steel and aluminium tariffs by the US.

30th International Horticultural Congress
INC sponsored the 30th International Horticultural Congress, held in Istanbul, on August 12-16. Under the motto “Bridging the World through Horticulture”, IHC provided a platform for scientists, engineers, growers, industry organizations, policy makers and other professionals to learn about best practices, future technologies in horticulture, plant genetic resources, plant breeding, horticultural economics and management, among many other topics.

10th Vinacas Golden Cashew Rendezvous
Mr. Michael Waring, INC Vice Chairman, participated at the 10th Vinacas Golden Cashew Rendezvous in Halong Bay, Vietnam, on October 5-7. Hundreds of domestic and international delegates attended the annual event of the Vietnam Cashew Association, to analyze, evaluate and promote international cashew trade. Mr. Waring participated at the “Key Panel by Cashew Industry Leaders” with industry representatives from Africa, India and the US, and presented global industry trends and an overview of the work of the INC and the Global Cashew Council.

8th International Macadamia Symposium
INC participated at the 8th International Macadamia Symposium in Lincang, China, on October 14-20. About 500 participants from 30 countries gathered under the theme “Green, Hope, Health and Share” to discuss the future of the international macadamia industry. Mr. Michael Waring gave a presentation of global nut industry statistics and chaired the round table “International Industry Overview”, featuring experts from the macadamia sector from China, Australia, South Africa, Kenya, USA, Brazil, Vietnam, Malawi, Mexico and Guatemala.

2nd International Almond Forum
On November 8, Mr. Pino Calcagni gave a presentation about almond trading and market perspectives in the 2nd International Almond Forum of Olin (Agromillora) in Córdoba, Spain. The aim of the meeting was to discuss, among industry specialists, agronomical management state of the art (varieties, plant material, plantings design, fertilization, irrigation…) towards a more efficient and profitable almond crop.

UNECE-FAO Conference, Redefining the Food Loss
INC attended the Conference “Redefining the Food Loss - Challenge for Sustainable Impact: Prevent, Reuse, Repurpose, Redirect”, organized by the United Nations Economic Commission for Europe and the Food and Agriculture Organization of the United Nations, in Geneva, on November 13. Experts from the private sectors, international organizations and NGOs, exchanged knowledge and new initiatives to reduce food loss and waste.

EC SPS Market Access Working Group Meeting
On November 15, INC attended the meeting of the Market Access Working Group on Sanitary and Phytosanitary issues organized by the European Commission, in Brussels. EC Representatives reported on the state of works on harmonized certificates and implementation of Free Trade Agreements, among others. The state of play of USA and Mexico, the EU-Canada Comprehensive Economic and Trade Agreement (CETA), EU-Vietnam FTA, and EU-Indonesia FTA negotiations, among others, were discussed.

FRUCOM Open Discussion Round
INC attended the Open Discussion Round of the European Federation of the Trade in Dried Fruit & Edible Nuts, Processed Fruit & Vegetables, Processed Fishery products, Spices, Honey (FRUCOM), held on November 22, with more than 20 representatives of different nut and dried fruit organizations and companies. FRUCOM gave an update on the projects of the organization and agreed that sustainability should be included within the scope of their activities.

33rd European Trade Meeting
INC was present at the European Trade Meeting (former European Dried Fruit Meeting) organized by the Waren-Verein der Hamburger Börse e.V., on November 23, in Hamburg. The meeting brought together more than 70 representatives of different nut and dried fruit organizations and companies. The event focused on the globalization of trade, the fruit and nut market in Turkey, CETA and Chile-EU Association Agreement, among other topics.

Global Hazelnut Project Meeting with Turkish Authorities
The Global Hazelnut Project group, chaired by Mr. Pino Calcagni, met with the Ministry of Agriculture and Forestry of Turkey in Ankara, on January 23, 2019, to discuss possible approaches to protect the hazelnut against H. halys, P. prasina and G. acuteaegulatus - the so called cimici whose action causes the cimiciato damage. One of the key points raised during the meeting was the importance of an integrated approach for the successful control of these pests.
INC collaborates with organizations around the world that share common goals and interests in representing and defending the nut and dried fruit industry, as well as promoting research and education, and communication campaigns.

Aegean Exporters Association; Almond Board of Australia; Almond Board of California; American Peanut Council; American Pistachio Growers; ANTEP Pistachio Promotion Group; Association of Chocolate, Biscuit and Confectionery Industries of Europe; Association of Turkish Nut and Dried Fruit Industrialists and Businessmen; Australian Cashew Association; Australian Macadamia Society; Australian Nut Industry Council; Australian Pistachio Growers Association; Australian Walnut Industry Association; Black Sea Exporters Union; Brazilian Association of Nuts and Dried Fruits; California Prune Board; California Fig Advisory Board; California Walnut Board and Commission; Chile Prunes Association; Chilean Walnut Commission; Chilenut; China Chamber of Commerce for Import and Export of Foodstuffs; China Tree Nut Association; DFA of California; European Federation of the Trade in Dried Fruit, Edible Nut, Processed Fruit and Vegetable, Processed Fishery Product, Spices, Honey and Similar Foodstuffs; European Snack Association; Freshfel; Greek Nuts and Fruits Trade Association; Hazelnut Growers of Oregon; Hazelnut Processors and Exporters Association of Georgia; International Society for Horticultural Science; Iran Dried Fruit Exporters Association; Iran Pistachio Association; Istanbul Exporters Unions; Kenya Nut Processors Association; National Table of Spanish Nut Production Organizations; Nutrition Research and Education Foundation; Netherlands Association for the Trade in Dried Fruit, Spices and Allied Products; Nucis Germany; Nucis Italia; Nuts for Life Australia; Macadamias South Africa (SAMAC); Spanish Almond Board; Spanish Association of Dried Fruits and Carobs; The Nut Association (former CENTA); Tree Nut Growers Association of Malawi; UK National Dried Fruit Trade Association; Ukrainian Nut Association; US Association of Food Industries; US National Pecan Shellers Association; US Peanut and Tree Nut Processors Association; Waren-Verein der Hamburger Börse e.V.