Mission and Objectives

The International Nut and Dried Fruit Council (INC) was founded in 1983 as the global organization focused on advancing the interests of the entire nut and dried fruit industry. Today the INC continues to facilitate success and promote business in all aspects of the industry.

- **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 TO:

- Increase the understanding of production, processing, marketing, distribution and consumption trends within the nut and dried fruit industry.

- Enhance market access by monitoring customs duties and trade barriers and advising governments on behalf of INC membership.

- Assure global quality standards and trading terms are within the framework of existing national and international bodies and do not inhibit trade within the industry.

- Promote and disseminate research and investigation, specifically nutrition, education and new product development.

- Encourage international cooperation by engaging with various public, private, national and international organizations, which share our common goals.

- Increase goodwill and mutual understanding of the nut and dried fruit industry by promoting international conferences in producing and consuming countries.

- Cooperate with national and international public and private institutions, such as Codex Alimentarius and United Nations, to promote global trade of nuts and dried fruits.
Membership Benefits

INC promotes the sustainable growth of nuts and dried fruits globally to improve healthy eating habits and benefit the businesses involved.

Connecting Business Leaders
Chance to contact 800+ member companies in 75+ countries via the INC Online Members Directory.
Access to industry leaders through advertising opportunities in the Nutfruit magazine, newsletter and website.

World Nut and Dried Fruit Congress
Network with top industry professionals 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.

Nuts and Dried Fruits Pavilion
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.

INC Academia: The Executive Program on Nuts and Dried Fruits
Learn the basics of the nut and dried fruit industry at discounted rates. The course includes 11 online units with over 40 videos and an optional on-site course.
Members receive significant discounts on enrollment. Also, students who enroll onto the full course (online and on-site) can save 50% on INC Congress Registration.

Online Statistics Database
Access 410,000+ statistics on crops, imports, exports and consumption since 1995, including a Statistical Yearbook.
World Trade Flow maps of nuts and dried fruits, highlighting trends and opportunities in production and consumption.

Publications
Three free annual printed and online issues of the Nutfruit magazine. It provides a global network of information about statistics, food safety, trade issues, new promotional ideas, scientific findings and many other topics.
Online Newsletter, sent regularly, informs about the latest INC activities, research findings, government regulations, press reviews of international media promoting the health benefits of nuts and dried fruits, as well as consumer trends and recipes.
Dear Friends,

It is my pleasure to present the 2019/2020 Annual Report of the International Nut and Dried Fruit Council.

The INC recognises the ongoing COVID-19 pandemic. With over 880 members from some 72 countries, we extend all sympathies and support. At time of writing the ramifications of COVID-19 are uncertain and I expect remain so at your time of reading. INC needed to be realistic in regards our ability to plan. It is in this context that the 2020 World Nut and Dried Fruit Congress was postponed to May 27-29, 2021. The first year missed since 1982.

I would like to thank the hard work of The Dubai Organising Committee Chaired by Mr Ashok Krishen. They will now demonstrate their wares in 2021.

The perseverance of the INC secretariat in Spain has remained outstanding. I applaud Goretti and her team and wish them continued good health. Under extremely difficult personal circumstances they have not “missed a beat”.

INC Committees form an integral part of INC operations and provides the opportunity for our members to support the efforts of the secretariat in Reus. A collaboration that positions “best of industry” with best professional support. Thank you, all Chairs, and participants for their contribution.

The 38th INC Congress in Boca Rotan, with nearly 1,300 participants from 63 countries was undoubtedly a success. Led by Ms. Gulsen Karanis (company Balsu) and featuring inspiring speeches from Dr. Oz, on the importance of communicating health messages, Mr. Hamdi Ulukaya, Founder, President, and CEO of Chobani, on why businesses should focus on their communities, and Mr. Brad Rose, Vice President of Rose Research, on how technology is changing and the possible use of it for understanding consumers’ behaviors.

This year we had the first Annual call for Scientific Proposals under the Sustainability, Scientific and Government Affairs Committee, chaired by Mr Pino Calcagni. The objectives of this new grant program are to analyse and report on the sustainability of the industry and highlight issues for deeper consideration. We aim to provide suggestions on several actions that may be adopted to identify and contribute to the overall sustainability of the sector and provide a scientific basis for best practices. Calls for Research Projects, Promotion & Dissemination Projects and Open Access Studies continue under the Nutrition Research and Dissemination Committee, chaired by Prof Jordi Salas. Under these two committee calls, the INC is funding over €1 million per year in grants.

Trade disputes between the world’s largest economies continue to be a topic of importance for the INC. INC Executive Committee organised meetings in Brussels with the European Commission to present the INC core activities and to raise concerns about the potential consequences of trade tariffs for the nut and dried fruit industry.

Finally, I would like to highlight the INC Pavilions at Anuga/Cologne and Gulfood/Dubai. These events continue to grow and provide members with an incredible opportunity to showcase themselves under the INC umbrella. Both Anuga and Gulfood saw premium locations for exhibitors and quickly evolved into the epicenter of the nut and dried fruit industry. The INC looks forward to continuing this service for its members to stimulate networking.

I would like to thank the members for their continued support of the INC and hope we will all be together again soon.

Sincerely,

Michael Waring
The situation around the world is unprecedented with COVID-19 taking a toll on individual’s lives and businesses. As a result of the evolving situation, the INC has taken the difficult decision to postpone the Dubai Congress until May 27–29, 2021. However, the INC is committed to providing the industry with the opportunity to hear the latest updates within the sector, about the next crop forecasts and the state of the industry. This will take place through a series of webinars in June that will provide our members with valuable insight normally presented at the congress.

The INC monitors trade issues that may have an impact on the nut and dried fruit sector, informing the members about the most relevant developments and taking action when needed. Likewise, we monitor regulatory changes, cooperate with international and supranational institutions as the official representative of the global nut and dried fruit industry, in matters relating trade and food safety. In this direction, in the coming months we are planning to launch the first INC Short Form Contract, that will be a useful tool to help the industry succeed in offering many advantages. The INC Short Form Contract will be transparent and balanced, provide certainty regarding contractual issues, serve as the guideline for international transactions and provide INC members with clear and understandable terms and conditions.

For 2020/2021 the INC is committed to engage with a new marketing campaign to disseminate health and nutrition information. The new campaign will aim to increase global consumer demand of nuts and dried fruits. The INC will conduct consumer trend research to provide data which will be used to determine the focus of the project. As in previous years, the INC will create a short video that will become the center point of the entire campaign. In addition to the main video, dissemination will take place via online advertising, social media, influencers, and community management.

With the aim of better connecting with the global INC community, the existing website will undergo a full redesign during 2021. The new website will reflect new technologies in web design, increase search engine friendliness and offer a high-quality user experience that will promise seamless integration of the information and services that the INC offers.

Health and nutrition research is another priority area, as well as the dissemination of new findings among health professionals. With this in mind, the INC is planning to support international events where researchers can exchange knowledge and set the course for future nutrition research. Alongside research, the INC will also promote research into production practices that are environmentally friendly, economically profitable and socially equitable, as well as innovations to improve food safety practices at any stage of the supply chain.

The INC keeps gathering statistical data to monitor current and projected supply, and use this information to assess the sustainable growth of the industry. In this direction we are planning to publish a series of country/product spotlight which focus is to highlight and analyze one specific nut or dried fruit in one country.

Finally, we are committed to continuing to develop the education program for industry professionals and business leaders, offering valuable learning and networking opportunities through the INC Academia.

I would like to end this letter by expressing my sincere gratitude for your continued support and contribution to the nut and dried fruit industry through the INC.

Sincerely,

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

- **Michael Waring**, MWT Foods, Australia – Chairman
- **Ashok Krishen**, Olam International Limited, Singapore – 1st Vice Chairman
- **Pino Calcagni**, Besana Group, Italy – 2nd Vice Chairman
- **Riccardo Calcagni**, Besana Group, Italy
- **Bill Carriere**, Carriere Family Farms, USA
- **Karsten Dankert**, Max Kiene GmbH, Germany
- **Roby Danon**, Voicevale Ltd, UK
- **Cao Derong**, China Chamber of Commerce, China
- **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
- **Jack Mariani**, Mariani Nut Company, USA
- **Mark Mariani**, Mariani Packing 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
- **Antonio Pont Jr.**, Crisol de Frutos Secos SAT, Spain
- **Chen Qi**, Qiaqia Food Co. Ltd., China
- **Jan Vincent Rieckmann**, August Töpfer and Co. (ATCO Group), Germany
- **Michael Rund**, Bösch Boden Spies, Germany
- **Hasan Sabir**, Sabirlar Findik Ihracat Ltd. Sti., Turkey
- **(Moves to Emeritus) Berton Steir**, The Wonderful Company, USA
- **Dick Walden**, The Green Valley Pecan, USA
Executive Committee: Formed by the Chairman, Vice-Chairmen and a maximum of ten more members of the Board in total, and the Executive Director, representing the regions and products of the INC members.

- Michael Waring, MWT Foods, Australia – Chairman
- Ashok Krishen, Olam International Limited, Singapore – 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy - 2nd Vice Chairman
- (Incoming) Bill Carriere, Carriere Family Farms, USA - Board Member
- Giles Hacking, CG Hacking & Sons Limited, UK - Board Member
- Jack Mariani, Mariani Nut Company, USA - Board Member
- Mark Mariani, Mariani Packing Company, USA – Board Member
- (Incoming) Pratap Nair, Vijayalaxmi Cashew Company, India – Board Member
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain - Board Member
- (Moves to Emeritus) Berton Steir, The Wonderful Company, USA - 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.

- Pratap Nair, India – Chairman
- Oscar Vergara, Argentina
- Declan Dart, Australia
- Michael Waring, Australia
- Frank Vaerewijck, Belgium
- Francisco Assis, Brazil
- José Eduardo Camargo, Brazil
- Stephen Meltzer, Canada
- Ranjeet Wallia, Canada
- Siefried von Gehr, Chile
- Chen Xianbao, China
- Chen Ying, China
- Cheng Hung Kay, China, Hong Kong
- Mohamed Auf Hamada, Egypt
- Richard Monnier, France
- Alexis Sumar, France
- Jan Vincent Rieckmann, Germany
- Catherine Balamoutsos, Greece
- Raju Bhatia, India
- Pankaj Sampat, India
- Vitali Levi, Israel
- Yossi Mussafi, Israel
- Alessandro Annibali, Italy
- Hidemitsu Honda, Japan
- Kazuo Julian Tagawa, Japan
- Mbugua Ngugi, Kenya
- Abdellah Fouad 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 Kushu, Russia
- Amit Khirbat, Singapore
- Alan Sutton, South Africa
- Alex Whyte, South Africa
- Miquel Borràs, Spain
- Stefan Boden, Sweden
- Varee Phonphaisan, Thailand
- Ahmed Boujbel, Tunisia
- Ahmet Goksan, Turkey
- Hasan Sabir, Turkey
- Jafar Moallem, UAE
- Roby Danon, UK
- Marc Rosenblatt, USA
- Jeffrey Sanfilippo, USA
- Steve Sousa, USA
- Jim Warner, USA
-Vu Thai Son, Vietnam

Senators: Senators are recognized for exceptional service towards achieving the goals of the INC. Currently, they are entitled to participate in Board meetings, share knowledge and experiences with the members of the Board.

- Hubert Berrebi, France
- Helmut Dankert, Germany
- Raoul Gamon, France
- Jordi Marti, Spain
- Walter F. Payne, USA
- Abbas Rafii, Luxembourg
- Don Soetaert, USA
- James Swink, USA
- Jack Taillie, Netherlands
- Frank Vaerewijck, Belgium
- Doug Youngdahl, USA
- Alan Sutton, South Africa
- Alex Whyte, South Africa
- Miquel Borràs, Spain
- Stefan Boden, Sweden
- Varee Phonphaisan, Thailand
- Ahmed Boujbel, Tunisia
- Ahmet Goksan, Turkey
- Hasan Sabir, Turkey
- Jafar Moallem, UAE
- Roby Danon, UK
- Marc Rosenblatt, USA
- Jeffrey Sanfilippo, USA
- Steve Sousa, USA
- Jim Warner, USA
- Vu Thai Son, Vietnam
INC Activities
BOCA RATON BY THE NUMBERS

The annual INC Congress is the largest international gathering of professionals, suppliers, traders, and buyers dedicated exclusively to the nut and dried fruit industry. From round tables and seminars to a Gala dinner and daily social activities, don’t miss this unique opportunity to network, share knowledge, and expose your company’s brand!

- **1,284** PARTICIPANTS
- **63** COUNTRIES
- **42** EXHIBITORS
- **60+** Top World Experts
- **12** Round Tables
- **3** Keynote Speakers
- **2** Scientific and Nutrition Seminars
- **3** Evening Social Events
VISITORS BY REGION

- **NORTH AMERICA**: 37% (479 visitors)
- **EUROPE**: 23% (303 visitors)
- **ASIA**: 23% (292 visitors)
- **LATIN AMERICA**: 10% (126 visitors)
- **MIDDLE EAST AND AFRICA**: 5% (57 visitors)
- **OCEANIA**: 2% (27 visitors)

COMPANIES BY ACTIVITY

- **34%** Traders: Export, Import and Brokers
- **24%** Manufacturers
- **29%** Suppliers: Nuts & Dried Fruits and Machinery
- **6%** Professional Bodies
- **6%** Others: Confectionery, Paste and Other Snacks
- **1%** Retailers
Dr. Oz, famed TV personality, discussed key elements to communicating the message of health, from how you talk about information to how you should approach people.

Mr. Hamdi Ulukaya, Founder, President, and CEO of Chobani, explained how businesses can do good for communities if they change their mindset from profit and shareholder to humanity and community.

During the Nutrition Seminar, Prof. Linda Tapsell, Senior Professor at the School of Medicine for the University of Wollongong in Australia, explored the latest finding about consuming nuts and dried fruits and how they appear to be associated with lower all-cause mortality.

Mr. Brad Rose, Executive Vice President of Rose Research, focused on how companies can utilize changing technology to better understand consumers and professional behavior.

In the Scientific Seminar, Dr. Vicki McWilliam, Clinical Allergy Dietitian and Researcher from the Royal Children’s Hospital and Murdoch Children’s Research Institute of Melbourne, examined new evidence and research regarding nut allergies.
Latest INC Awards

Corporate and Individual Golden Nut and Dried Fruit Awards

2014 Melbourne, Australia
John Waring, Australia
2015 Antalya, Turkey
H. Cuneyd Zapsu, Turkey
2016 San Diego, USA
The Wonderful Company, USA
Jack Mariani, USA
2017 Chennai, India
K. Ravindranathan, India
2018 Seville, Spain
Borges Agricultural and Industrial Nuts, Spain
Giles Hacking, UK
2019 Boca Raton, USA
Costco Wholesale Corporation, USA
Bert Steir, USA

Award for Excellence in Gastronomy

2014: Neil Perry, Rockpool Group, Australia
2015: Mert Seran, Ulus 29, Turkey
2016: Christopher Kostow, The Restaurant at Meadowood, USA
2017: Bukhara Restaurant, India
2018: Joan Bosch, Can Bosch, Spain
2019: Andrew Roenback, Boca Raton Resort & Club, USA

Innovation Award

2015: Tomra, Belgium
2016: Blue Diamond Growers, USA
2017: Qcify Inc, USA
2018: Setton Pistachio of Terra Bella Inc., USA

Award for Excellence in Research

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
2019: Besana Group, Italy

Other Recognitions

2014: Chris Joyce, Nuts for Life, Australia (Lifetime Achievement Award)

Honorary Golden Nut and Dried Fruit Awards

1985: Juan Carlos I, King of Spain
1989: Mario Soares, President of Portugal
1999: Turgut Ozal, President of Turkey
1993: 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 Pueyo, General Secretary of Agriculture and Food, Ministry of Agriculture of Spain
2015: Mevlüt Çavuşoğlu, Minister of Foreign Affairs of Turkey
INC Pavilion at Anuga Cologne: The Epicenter of the Nuts and Dried Fruit Industry

The INC once again attended Anuga, the world’s largest trade fair for food and beverages, in Cologne, Germany from October 5–9, 2019. The event was a success with 21 co-exhibitors joining the INC Pavilion spread over 320 m². INC Executive Director, Goretti Gausch stated, “the INC Pavilion has been, without a doubt, the epicenter of the nut and dried fruit industry in Anuga.”

The pavilion was located in Hall 10.2 Fine Foods, which gave co-exhibitors the opportunity to gain valuable exposure and enabled them to enhance their brand. The pavilion served as a central point for business meetings and networking.

During Anuga, the INC hosted two cocktail events. The first cocktail event was co-sponsored by Monnier & Partners and ATCO Group. The second cocktail was sponsored by Valley Macadamia Sales. These informal gatherings created an area of knowledge spillover and encouraged industry professionals to share insights and do business in a relaxed setting.
Gulfood Dubai 2020

After the largest and most successful Gulfood in 2019 with over 100,000 visitors from more than 200 countries, the INC was present at the Dubai World Trade Center for Gulfood 2020 from February 16-20. This represented the 4th edition of the INC Pavilion in the Middle East.

The 180 m² pavilion, located at Hall 2 – Pulses/Grain & Cereals, booth 47, saw a heavy flow of traffic, giving the 17 INC members from 8 countries the opportunity to explore new markets and socialize with other industry professionals.

On Monday, February 17, the INC held the INC Cocktail Event which was sponsored by Voicevale. The cocktail was seen as the not-to-be-missed event of the nut and dried fruit industry, providing attendees with the chance to broaden their business and brand.
In 2018 the INC Academia launched the first Executive Program on Nuts and Dried Fruits with the objective of teaching the basics of the nut and dried fruit industry, main characteristics, applications and information resources.

The Program combines online lessons, including readings, tutorial videos and self-assessment tests, with an intensive on-site experience where students have the chance to visit orchards and factories, gain fantastic networking opportunities and learn through case studies developed by professors from prestigious business schools.

The second edition of the INC Academia closed on May 21, 2019, with a total of 51 students from 25 countries, 21% more than in the previous edition. With this success, the INC Academia continues to grow as the educational program for food industry professionals.

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

Online Course

The content of the online course was created by top experts from the world’s most prestigious institutions and companies. The program consists of 11 units (±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. **Harvesting & Processing:** Main processing operations that can take place during and after harvest, including shelling, drying, sorting, pasteurization, frying, flavoring and storage.
   - 5.1. Harvest
   - 5.2. Shelling
   - 5.3. Blanching
   - 5.4. Drying
   - 5.5. Sorting technologies
   - 5.6. Pasteurization
   - 5.7. Fumigation with phosphate
   - 5.8. Storage
   - 5.9. Frying and dry roasting
   - 5.10. Flavoring

6. **Retail packing & allergen management:** Essential knowledge of the packaging process and packaging materials, including contaminant detection and allergen management.
   - 6.1. Multihead weighing and bag forming
   - 6.2. Modified Atmosphere Packaging
   - 6.3. Vacuum packing
   - 6.4. Packaging
   - 6.5. Contaminant detection and removal
   - 6.6. Allergen management

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

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

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

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

11. **Negotiation:** Essential strategies and skills for successful negotiations.
On-Site Course

Complementing the online course, the on-site program is the ideal opportunity for students to expand their knowledge even further, while enabling them the invaluable opportunity to network with fellow peers within the industry.

Last year, the on-site course took place in California, from May 18 to 21, 2019, just before the 38th World Nut and Dried Fruit Congress in Boca Raton. Students visited the pistachio orchards of Strain Ranches, the almonds orchards of Chamisal Creek Ranch and Vann Family Orchards, and the walnuts orchards of Carriere Family Farms. They also had the opportunity to visit several processing plants: Carriere Family Farms (walnuts), Vann Family Orchards (almonds), Yolo Hulling & Shelling (almonds), and Mariani Packing (dried fruits), as well as the Innovation Center of Blue Diamond Growers.

The last day was dedicated to discuss different case studies at the UC Davis—one of the top colleges of agricultural and environmental sciences in the world. Prof. Rachael Goodhue presented two case studies about strategic management: the case “Borges Agricultural and Industrial Nuts: A Paradigm Shift” (a case study about a real nut-industry company) and the case “Taylor Farms: A Resource Allocation Challenge”. In the afternoon session, Prof. Dr. Kandarp Mehta, from the prestigious IESE Business School conducted two Negotiation simulations.

Authors

- Mr. Rudolf Ernst, August Töpfer & Co, Germany
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- Mr. Thomas Barber, Bühler Aeroglidée, USA
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- Prof. Dr. Kandarp Mehta, IESE Business School, Spain
- Mr. Marco Azzaretti, Key Technology, USA
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- Assoc. Prof. Cesaretin Alasalvar, TÜBİTAK Marmara Research Center, Turkey
- Ms. Claudia Toussaint, Waren-Verein der Hamburger Börse e.V., Germany

Academia in figures
(Ed 2018 + Ed 2019):

- 31 countries
- 29% Others
- 37% Managers
- 34% CEOs/Directors
- Top countries
  - USA 21%
  - Spain 10%
  - Netherlands 8%
  - UK 8%
The INC Publications strategy aims to provide INC members with the latest news and information within the sector, promote the sustainable growth of the nut and dried fruit industry, and spread the goodness of nuts and dried fruits all over the world. The strategy unfolds on various mediums such as the Nutfruit magazine, newsletters, the Statistical Yearbook, the Import Border Rejections Report, and Technical Information Kits.

Technical Information Kits

In an effort to spread a basic understanding of various products, these kits provide information on the use, characteristics, applications, food safety and quality standards. Each kit consists of six different sections, covering: General Information, Products, Forms and Varieties, Processing, Quality Requirements, and Standards and Grades.

Newsletters

Newsletters provide consumers, members, and health professionals with the latest updates on what is happening at the INC. Three different types of newsletters, one for the industry, one for consumers, and one for health professionals, were sent out over the past year in efforts to inform shareholders and disseminate INC information.

Statistical Yearbook

Every year, the INC publishes their Statistical Yearbook. This publication provides readers with an overview of the latest statistics on nut and dried fruits production, trade, and consumption globally. With the yearbook, readers can have a look into the data that forms the nut and dried fruit industry!

Import Border Rejections Report

The Import Border Rejections Report is another publication that is released every year. The report gives insights into the import alerts and notifications for nuts and dried fruits in Europe, USA, Japan, and Australia, analyzing the trends and monitoring the causes and origins.
Nutfruit Magazine

The official voice of the nut and dried fruit industry.

Every March, July, and November, the INC issues the Nutfruit magazine which contains a wide variety of topics and content. Forming the official voice of the nut and dried fruit industry.

The magazine balances market-oriented sections such as Business News, Legal Update, and the Global Statistical Review while simultaneously providing readers with informational sections like Health News, INC Congress, INC News, and Industry News. This combination offers readers the most in depth and comprehensive overview of the nut and dried fruit industry. Additional in-depth sections such as Gourmet, A Chat with the Industry, and Feature Articles provide high quality and interesting content for Nutfruit and make this the go-to magazine for the entire industry.

11,000+ Online readers
6,000+ People receive the magazine newsletter
3000+ Circulation
Health & Nutrition
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 Open Access Studies and the Call for Promotion and Dissemination Projects.

Research Grants

In 2019, INC approved to fund the following research projects. Such project proposals had been submitted to the annual Call for Research Projects (up to €300,000) with due date for submission on January 31, 2019. 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 recipients:

- Project: Effects of long-term mixed nut consumption on brain health in elderly: Focus on underlying mechanisms (clinical study). Principal Investigator: Prof. Ronald Mensink, Maastricht University, Netherlands.
- Project: Associations between nut intake, cognitive function and nonalcoholic fatty liver disease in older adults (epidemiological study). PI: Dr. Sze-Yen Tan, Deakin University, Australia.

From the 16 scientific studies funded by the INC since the first Call launched in 2013, a total of 10 studies have already been completed: 9 studies were published in scientific journals and 1 project is still pending submission to a scientific journal—researchers are currently working on the manuscript.
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 OPEN ACCESS STUDIES

On January 11, 2019, the INC launched the Annual Call for Open Access Studies (up to €18,000), the objective of which is to facilitate the transfer of knowledge and to promote the dissemination of the health benefits of nut and dried fruit consumption as widely as possible, through the payment of the Open Access fees of scientific studies.

INC funded the Open Access publication of two studies in 2019:

- Pistachio consumption modulates DNA oxidation and genes related to telomere maintenance: a crossover randomized clinical trial. Published in The American Journal of Clinical Nutrition.

CALL FOR PROMOTION AND DISSEMINATION PROJECTS

The INC approved to fund the following projects in 2019. The projects had been submitted to the annual Call for Promotion and Dissemination Projects (up to €50,000) launched in November 2018, with due date for submission on January 31, 2019. 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:

- Nucis Italia. Project: "Nuts and nutrition system".

CALL FOR OPEN ACCESS STUDIES

On January 11, 2019, the INC launched the Annual Call for Open Access Studies (up to €18,000), the objective of which is to facilitate the transfer of knowledge and to promote the dissemination of the health benefits of nut and dried fruit consumption as widely as possible, through the payment of the Open Access fees of scientific studies.

INC funded the Open Access publication of two studies in 2019:

- Pistachio consumption modulates DNA oxidation and genes related to telomere maintenance: a crossover randomized clinical trial. Published in The American Journal of Clinical Nutrition.
13TH ASIAN CONGRESS OF NUTRITION, BALI (INDONESIA)

The INC attended from August 5 to 7 the 13th Asian Congress of Nutrition in Bali, Indonesia. This quadrennial congress attracts more than 4,000 global nutritionists and health professionals. The INC co-sponsored along with the California Prune Board the symposium “Nut and Dried Fruit Consumption and the Prevention of Prevalent Diseases/Conditions” on August 5, 2019, where four researchers from Australia, Spain, India and the United States shared the latest findings in the field of nuts & dried fruits, and health.

The session brought together expertise and insight into nut and dried fruit consumption in relation to diabetes, brain function, cardiovascular disease and bone health.

International speakers included Prof. Anoop Misra, Chairman of the Diabetes Foundation, Fortis Centre of Excellence for Diabetes, Metabolic Diseases & Endocrinology (India); Prof. Linda Tapsell, Senior Professor at University of Wollongong (Australia); Dr. Emilio Ros, Former Director, Lipid Clinic and Senior Consultant, Endocrinology and Nutrition Service at Hospital Clinic de Barcelona (Spain), and Dr. Shirin Hooshmand, Associate Professor at San Diego State University (USA).

13TH EUROPEAN NUTRITION CONFERENCE, DUBLIN (IRELAND)

This conference, organized by The Nutrition Society and the Federation of European Nutrition Societies (FENS), brings together over 2,500 delegates. The event was held on October 15-18, 2019, in the Convention Centre of Dublin, Ireland, under the theme “Malnutrition in an Obese World: European Perspectives”.

INC sponsored the symposium “Nuts & Health: New Insights into Diabetes, Obesity and Gut Microbiota” on October 15, where four international leading nutrition experts from Spain, the United Kingdom and the United States shared the latest findings in the field of nuts and health. The session provided participants with in depth knowledge on nut consumption and type 2 diabetes, appetite and obesity, and modulation of the gut microbiota.

The panel of world-renowned researchers included Prof. Jordi Salas-Salvadó, Chairman of the INC World Forum for Nutrition Research and Dissemination, and Professor of Nutrition at the Rovira i Virgili University (Spain); Dr. Richard Mattes, Distinguished Professor of Nutrition Science at Purdue University (USA); Dr. Crystal Haskell-Ramsay, Associate Professor of Biological Psychology at Northumbria University in Newcastle upon Tyne (UK), and Dr. Joan Sabaté, Professor of Nutrition and Epidemiology in the School of Public Health of Loma Linda University (USA).
Marketing & Communication
The 2019 Communication and Digital Marketing Plan was disseminated through various channels to promote INC initiatives and raise awareness for the health benefits of nuts and dried fruits. All actions that were carried out encompassed the goal of increasing global consumption and making certain that the voice of the nut and dried fruit industry is heard throughout the world.

Press Releases

Helping boost the INC’s global visibility, a total of 9 press releases were sent throughout the year. Content is focused on INC projects, scientific studies that highlight the health benefits of nuts and dried fruits, and the INC Congress which took place in Boca Raton, USA. The releases have achieved a total number of 5,803 impacts, a 216% increase from 2018.

Two press releases were written and sent to promote the INC Congress in Boca Raton, one pre-congress and one post-congress. These releases received almost 1,000 impacts across online platforms.

Social Media

Social media allows the INC to inform, educate and connect with its target audience in a more personalized manner. The INC is active on multiple platforms including Instagram, Facebook, Twitter, LinkedIn, and YouTube. While 2018 was a successful year for the INC’s social media, 2019 saw even further growth and a record number of user interactions.

While every single platform saw an increase in the number of followers, fans, and subscribers, Instagram saw the most growth with a 67% increase in followers from December 2018. Instagram has also proven to be the most interactive network, seeing comments on posts rise from 284 at the end of 2018 to 15,978 in 2019. Another platform that has seen significant growth is YouTube. The number of subscribers to the INC YouTube page is 6 times more than 2018. In short, all platforms have been successful and the anticipation for 2020 is that they will continue to surge!
Created Content

The 2019 recipe plan, healthy breakfasts, was created in-line with the global dissemination plan with the aim to encourage morning consumption of nuts and dried fruits. Starting in June, two healthy breakfast video recipes were published each month with each recipe containing at least one nut or dried fruit. By December 2019 14 videos had been published and reached an astonishing total of 3,000,000+ views. Reflecting 2020 trends in gastronomy, the INC will create 14 buddha bowls, of which three have already been launched and to date have received 122,000+ views.

Moreover, 12 videos, highlighting health benefits and trivia about nuts and dried fruits, were published throughout the year. Each video was disseminated through all digital mediums of communication, from the website to social media. Other videos published by the INC include two scientific studies focusing also on the health of nuts and dried fruits.

INC Website

The INC website acts as the base for all information that is distributed through the INC. The website is divided into three segments, Consumers, Health Professionals, and Industry. Traffic on the website has substantially increased since 2018. Total visits to the website are currently at 722,400, compared to 310,590 in 2018. Looking specifically at the divisions of the website, the consumer section is the most visited with a total of 572,059 visits.

The consumer part of the website is dedicated to educating consumers about the health benefits of nuts and dried fruits and inspiring them to include them into their lives. The health professional section highlights research and funding opportunities as well as news regarding health. Finally, the industry segment focuses the news regarding the industry such as the INC Congress, INC Pavilions, and provides access to data and statistics for industry professionals.

Online Advertising

The growth of INC websites and social media platforms is essential for stimulating and facilitating sustainable growth in the nut and dried fruit industry. It is also imperative for raising awareness about the health benefits of nuts and dried fruits to consumers. Online advertising is an indispensable method that the INC employs to generate growth among websites and social media. The investment in online advertising is focused on consumers, health professional, and industry campaigns.

Throughout 2019, ads were responsible for 24% of all visits to the consumer website, almost 45% of new subscribers to the newsletter for health professionals, and for over 4,000 visits to the industry page as well as 14 new members.
The Nutfruit Power Campaign was launched mid-2019 with the goal of increasing nut and dried fruit consumption in the morning. People need power to face the challenges of the day, which is why nuts and dried fruits should be in the mix. A study showed the majority of consumption takes place in the evening, and an easy way to increase morning consumption of nuts and dried fruits is by having a healthy-oriented breakfast.

The project consisted a video campaign, a campaign website, online advertising, and a social media challenge that included influencers, community management, and healthy breakfast recipes shared by individuals.

### Video Campaign

Considered to be the main part of the campaign, the video shows how a handful of nuts in the morning can give you energy to get through the day! The video was released on September 2 and within two days, views climbed to almost 1,000.

- **1,000,000+ YouTube Views**
- **8,200+ hours Total Watch Time**
- **2,700,000+ Facebook & Instagram Views**

*90% have watched the video for the full duration
** 75% or more of the video was watched

### Campaign Website & Online Advertising

The webpage for the campaign, which is integrated into the INC’s already existing consumer website, has achieved over 195K views. A large portion of these visits, 35%, can be attributed to online Google advertising.

Google text ads have received over 12,000 visits, while the Google display ads attained over 79,000 visits. Google ads, text, display, and YouTube have attained 104,717 out of the 195,981 total visits to the campaign landing page. In addition, adverts were placed on Facebook and Instagram to leverage the campaign’s message on social media. In total, these adverts received over 24 million potential impacts.
Social Media Challenge

Furthermore, expanding the reach of the project, the INC launched a social media challenge to engage consumers. INC followers and influencers were asked to create a healthy breakfast recipe using nuts and dried fruits and then use #NutFruitPowerChallenge. Apart from the influencers, over 50 individuals posted on social media with the #NutfruitPowerChallenge. Check out two of the recipes that used the campaign hash-tag!

Social Media Influencers

During the campaign, influencers from all around the world partnered with the INC in order to help spread the message of the campaign. They posted wonderful recipes and engaged their followers to use #NutFruitPowerChallenge

The 2020–2021 Global Dissemination Plan objective is to grow consumer demand for nuts and dried fruits worldwide. The goal of increasing demand will be achieved through disseminating the health benefits of nuts and dried fruits along with promoting healthy eating habits. The project will consist of two distinct parts the first part will be research on consumer trends, which will be the fuel for the final campaign, and the second part will be the campaign which will consist of a main video, online advertising, community management and influencers.
Sustainability, Scientific, & Technical
Sustainability, Scientific and Government Affairs Committee: This committee monitors sustainability issues and international regulations/standards that may have an impact on the sector.

- Mr. Pino Calcagni, Besana Group, Italy - Chairman
- Ms. Julie G. Adams, Almond Board of California, USA - Vice-Chairwoman
- Prof. Dr. Uygun Aksoy, Consultant, Turkey
- Prof. Dr. Güner Arkun, Istanbul Aydin University, Turkey
- Mr. Josep Arqués, Borges Agricultural and Industrial Nuts (BAIN), Spain
- Mr. Jonny Fahje, Olam International Limited, Singapore
- Mr. Marcel Bruggeman, NofaLab, Netherlands / Nico Janssen, Dr. A. Verwey B.V., Netherlands
- Dr. Tommaso de Gregorio, Ferrero, Italy
- Prof. Rachael Goodhue, UC Davis, USA
- Mr. Charith Gunawardena, Bühler Group, Switzerland
- Mr. Cheng Hung Kay, CHK Trading Co Ltd., China, Hong Kong
- Mr. Agostino Improta, Besana Group, Italy
- Dr. Cameon Ivarsson, Natasol AG, Switzerland
- Mr. Tom Jones, DFA of California, USA
- Mr. Brendan O'Donnell, TOMRA Sorting, Inc., USA
- Mr. John O'Neill, Tesco Stores Limited, UK
- Mr. Antonio Pont Jr, Crisol de Frutos Secos SAT, Spain
- Dr. Jochen Riehle, Eurofins, Germany
- Ms. Miriam Villen, Stahmann Farms Enterprises PTY LTD, Australia
- Ms. Chen Ying, China Chamber of Commerce, China

INC keeps a close watch on those issues that may pose a threat to the sustainable growth of the industry. Moreover, in order to widen the scope of cooperation, the number of members of this Committee was incremented from 11 to 20 over the last year.

The INC is recognized as the official representative of the global nut and dried industry by international and supranational institutions such as the Codex Alimentarius—the joint food standards program for the United Nations’ Food and Agriculture Organization (FAO) and the World Health Organization (WHO)—the World Trade Organization (WTO), the United Nations Economic Commission (UNECE), European Commission (EC), etc.

As the official voice of the global trade and production of nuts and dried fruits, INC participated in the following activities:

- **Codex Alimentarius.** INC participates as Official Observer in different electronic working groups (EWG) and sessions. In 2019/20, INC took part 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 gather relevant information on bulking and blending.
  - **Codex Committee on Processed Fruits and Vegetables (CCPFV)**
    - EWG on Dried Fruits: to review the draft General Standard for Dried Fruits, including annexes for raisins, dates and dried apricots.
• **UNECE.** INC collaborates with the United Nations Economic Commission for Europe in the review of Agricultural Quality Standards for tree nuts and dried fruits. In 2019, UNECE adopted new Standards for dehydrated coconut kernel pieces, dried ripe papayas and dried melons revised the Standards for walnut kernels and prunes and adopted posters for inshell pistachios, inshell walnuts and dried apricots.

• **EC.** In September and October 2019, the INC Executive Committee visited Brussels for a series of meetings with the European Commission, namely the Directorate General for Trade (DG TRADE), Directorate General for Health and Food Safety (DG SANTE) and Directorate General for Agriculture and Rural Development (DG AGRI).

The meetings served the double purpose of presenting INC core activities and updating the European Commission on nut and dried fruit production and trade issues. The focus of the meetings was to present an overview of industry statistics, with key facts and figures about the nut and dried fruit industry in the European Union.

These meetings provided valuable opportunities to discuss areas of particular concern to the industry, specifically in a context of trade tensions among the world’s largest economies.

In 2019/2020, the Committee paid special attention to the following issues:

**Pesticides:**

• **Chlorate.** During 2019, the Draft European Commission (EC) Regulation as regards maximum residue levels (MRLs) for chlorate in or on certain products was discussed by Member States and had favorable opinion during the Standing Committee of February 2020. The Draft sets the following MRL of chlorate in nuts and dried fruits: tree nuts at 0.1 ppm apricots, plums, grapes, cranberries and peanuts at 0.05 ppm and dates and figs at 0.3 ppm.

• **Chlorpyrifos and Chlorpyrifos-methyl.** In January 2020, the approval of the active substances chlorpyrifos and chlorpyrifos-methyl was not renewed. Following non-approval, Member States supported the lowering of the MRLs for both substances during the Standing Committee held in February 2020.

**Contaminants:**

• **Aflatoxins.** In October 2019, the European Food Safety Authority (EFSA) launched a consultation on the Draft Scientific Opinion on the Risks to public health related to the presence of aflatoxins in food. EFSA presented estimations of human dietary exposure and an assessment of human health risks related to dietary exposure to aflatoxins. INC participated in the consultation providing a set of scientific studies published to date.

In March 2020, EFSA published the final Scientific Opinion on Risk assessment of aflatoxins in food, according to which the highest aflatoxin B1 and total aflatoxins mean concentrations were obtained for the food category ‘legumes, nuts and oilseeds’, in particular for pistachios, peanuts and ‘other seeds’.

• **Ochratoxin A (OTA).** At EU level, the discussion on the possibility of establishing an OTA maximum limit (ML) for nuts and dried fruits (currently, the only ML in place is the one for dried grapes at 10 ppb) was held until the outcome of EFSA’s assessment.
In December 2019, EFSA launched a public consultation on the Draft Scientific Opinion on the Risks to public health related to the presence of OTA in food. Dried and fresh fruit such as grapes, figs and dates have been pointed as important contributors in some of the ‘Toddlers’ and ‘Other children’ groups.

- **Cadmium.** The EC is discussing potential changes to the cadmium levels for several food commodities, including tree nuts and peanuts (currently exempted). The proposed ML for cadmium in tree nuts and peanuts is 0.20 mg/kg according to FRUCOM. INC participated in the consultation via FRUCOM, underlining that “legumes, tree nuts and oilseeds” is not one of the food categories that contribute most to cadmium intake.

**Additives:**

- **Sorbates.** On March 1, 2019, EFSA published the Scientific Opinion on the Follow up of the re-evaluation of sorbic acid (E200) and potassium sorbate (E202) as food additives. Based on the findings, EFSA changed the temporary group Acceptable Daily Intake (ADI) of 3 mg sorbic acid/kg body weight (bw) per day for sorbic acid (E 200) and its potassium salt (E 202) to a new group ADI of 11 mg sorbic acid/kg bw/day. Regarding the stability of the sorbates in food, as no new information was provided, no re-assessment was made.

**Import Border Rejections**

INC monitors import border rejections in Europe, USA, Australia and Japan, analyzing the trends, causes and origins.

In 2019, the total number of notifications in the European Union, Japan and Australia decreased from 2018 by 8.8%, 22.6% and 35.5%, respectively. On the contrary, the number of notifications in the US increased by 54.8%, breaking the downward trend of the 2015-2018 period. The presence of aflatoxins was, in general, the main reason for notifying, especially in the case of nuts.
Call for Scientific Proposals

With this grant, the INC is promoting research as a tool for strengthening the sustainable growth of the nut and dried fruit industry.

In 2019, INC launched, for the first time, the Annual Call for Scientific Proposals (up to €150,000) to fund projects aimed at promoting research that may contribute to improving how nuts and dried fruits are grown and processed in a safe and sustainable way.

Objectives:

• To analyze and report on the sustainability of the nut and dried fruit industry; to highlight issues for consideration and suggest a number of actions that may contribute to the overall sustainability of the industry, with specific references to environmental, social and economic sustainability.

• To provide a scientific basis for best practices across one of the two priority areas: sustainability and/or food safety.

Priorities:

• **Sustainability**: Production practices that are environmentally friendly, economically profitable and socially equitable.

• **Food safety**: Innovations to improve food safety practices at any stage of the supply chain.

The Call opened on December 3, 2020, and public and private institutions, as well as not-for-profit organizations, had the opportunity to submit proposals until January 31, 2020. The applications will be peer-reviewed by the Evaluating Committee and the final funding decision will be made by the INC Executive Committee.
Statistics and Megatrends

The Statistics Committee aim is to support the INC in gathering and reviewing a variety of statistical data that is relevant, timely and reliable for distribution to the industry, governments and the general public. The Committee also helps to expand the INC statistical records range, in order to better understand the situation of the nut and dried fruit industry and face the challenges ahead.

- 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
- 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 online Database is a tool for INC members that allows to analyze nut and dried fruit world production, supply, trade and consumption historical trends and latest data. Starting at 1995 up to today, the database records cover around 400,000 entries which can be broken down by year, country and product.

The Database can be accessed through three different reports:

- **Dashboard**, to visually analyze on a world map the industry size based on production, imports, exports and consumption data split by product and year.
- **Advanced Search**, designed to look for production, stocks, trade and consumption annual data at country and product level through tables and charts.
- **Trade Data**, which offers from a basic overview to a detailed (year, country and product breakdowns) volume-wise market shares of exporting and importing countries via world maps, charts and tables.
World Trade Map

In April 2019, the INC released the latest edition of the World Nut and Dried Fruit Trade Maps. This bi-annual issue featured two separate maps for Nuts and Dried Fruits, respectively. Additionally, the Nuts map included tree nut in-shell, intra-European and peanut trade individual maps.

Available as printed posters for INC members, the maps show the trade flows among top nut and dried fruit origins and destinations globally, offering an overview of the market size and the top players for each product.
Statistical Yearbook

The 2019/2020 Statistical Yearbook, published in April, offers an insightful analysis over the last 10 years on tree nut, peanut and dried fruit production, trade and consumption. The study summarizes firstly, world production, consumption and supply value trends of the last decade followed by an in-depth analysis for each nut and dried fruit. These reports cover:

• Production trends and share by country (current season, 5-year average and 10-years series).
• Export and import leading players and market share.
• 5-year consumption trends.
The analyzed data shows that overall tree nut production increased at a steady pace over the last decade, amounting to around 4.6 million metric tons in 2019/2020 (kernel basis, except pistachios in-shell). Volume-wise, almonds and walnuts were the biggest crops, with 31% and 21% of the world share, respectively; followed by cashews (17%), pistachios (14%) and hazelnuts (12%). Pecans, macadamias, Brazil nuts and pine nuts accounted for the remaining 5%. Increasing at an average rate of 69,500 MT/year, tree nut exports (shelled, except pistachios in-shell) also followed a positive trend, reaching 2.3 million MT in 2018. As for global consumption, estimated at over 4.6 MT in 2019, it showed an increasing trend of 200,000 MT/year, on average.

World peanut production in 2019/20 added up to over 41 million metric tons. In spite of being 3% down from the previous season, it was 7% above the prior 10-year average reflecting the positive trend observed over the prior 10 years. China accounted for 38% of the world crop, followed by India with 15%. The next leading players were Nigeria (8%), the US (6%), Senegal (3%) and Argentina (3%). Total exports of shelled peanuts reached 2.3 million MT in 2018.

Similarly, dried fruit production showed a positive trend over the last decade, reaching 3.2 million MT in 2019/20. Dried grape production (Raisins, Sultanas and Currants) represented 41% of the world share; table dates followed with 35%. The remaining 24% was distributed among prunes (7%), dried cranberries (6%), dried apricots (6%) and figs (5%).

Amounting to about 2.7 million MT in 2018, dried fruit exports have increased at a steady pace at an average rate of around 110,800 MT/year. World consumption has been growing around 85,500 MT/year, on average.

**Megatrends**

Due to the increment in nut and dried fruit world supply expected for this decade, it is relevant for the industry to assess the trends in global production and demand. To this purpose, the INC is directing efforts to support with statistical data analysis the sustainable growth of the nut and dried fruit industry.

With the contribution of the Statistic Committee, the INC has been gathering data from both the leading and emerging origins about production; bearing and non-bearing planted hectares and new plantings in order to anticipate which would be the global nut and dried fruit supply scenario for the next ten years.
Global Cashew Council

A study funded by the Global Cashew Council helped KIND Nuts cashew-based bars claim lower calories. The research, published in the journal *Nutrients*¹ in 2019, found that cashews have 16% fewer calories than previously thought.

Led by Dr. David Baer at the U.S. Department of Agriculture, Beltsville Human Nutrition Research Center, the results of the study showed that the available energy (calorie) content of cashews is 16% lower than that which is typically stated on food labels and databases in the US, including the National Nutrient Database for Standard Reference. These must be corrected in order to provide consumers with accurate energy values. 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.

The INC created a short animated video, available in YouTube, explaining the methodology and results of the study for diffusion among health professionals and consumers.

The GCC achieved another milestone with the launch of the website www.cashews.org. Designed to attract all publics, with specific sections for consumers, health professionals and the industry, the webpage has seen great results achieving 106,991 visits, with the recipes pages proving to be the most popular achieving 80% of the total visits to the website.

The project also includes an online advertising plan and a dissemination plan through social networks. At the end of December 2019, the networks had gained the following number of fans: Facebook: 4,411, Instagram: 2,207 and Twitter: 186.

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Macadamia Council

The 5th Meeting of the INC Macadamia Council took place on May 24, 2019, in Boca Raton, FL USA. Members and observers discussed about world macadamia supply and demand; past, current and projected growth of production and demand, and a first joint initiative to promote the consumption of macadamias.

As for the research, The Effects of Macadamia Nuts on Cardiometabolic Risk Factors and Adiposity: A Randomized Intervention Study, Dr. Joan Sabaté and his team at Loma Linda University (USA) are expected to conclude the project in the coming months. The study is a randomized clinical crossover trial designed to evaluate the effect of macadamia nuts on cardiometabolic risk when consumed as 15% of daily calories.

Global Hazelnut Project

The INC organized, in partnership with Ferrero Farming Values and with the support of Ondokuz Mayıs University, the seminar STINK BUGS: A Potential Threat for Turkish and Mediterranean Agriculture, in Istanbul, Turkey, from January 28-29, 2020.

An international group of leading experts, whose work focuses on monitoring and finding a solution to the stink bugs, presented the latest developments and research into stink bugs and the importance of orchard protection, specifically against Halyomorpha halys (also known as Brown Marmorated Stink Bug), Palomena prasina, Gonocerus acuteangulatus and Nezara viridula in the hazelnut and fresh fruit sectors, in Turkey, Italy and Georgia, in particular.

The first day concentrated on presenting the latest developments and monitoring results, with the second day consisting of a workshop to learn about monitoring techniques and integrated pest management against the Brown Marmorated Stink Bug. The event was attended by Government authorities, universities, associations of exporters and private companies from France, Georgia, Italy, Luxemburg, Spain, Switzerland and Turkey.
Business Integrity

The INC Business Integrity Committee main objective is to promote and raise awareness of codes, practices and guidelines with regard to honest and diligent business.

The BIC is asked each month to review the list of applications from new members and non-members wishing to attend the congress, and send recommendations to the Executive Committee for the final approval or rejection of companies. This admission process seeks to fully protect the interests of INC members and congress participants and ensure that new companies are reliable and respect a diligent code of conduct.

The BIC is currently working alongside the Executive Committee to finalize an INC Short Form Contract for the sale and purchase of nuts and dried fruits for all INC members.

Tariffs and Trade Barriers

Due to their importance, trade issues that may potentially affect nut and dried fruit sector are closely followed-up. The INC informs its members about the most relevant developments regarding trade, especially those affecting nuts and dried fruits. In addition, the INC also takes proactive action when needed, in order to safeguard the members interests.

<table>
<thead>
<tr>
<th>Country</th>
<th>Event Date</th>
<th>Action Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>May 20, 2019</td>
<td>Eliminated additional tariffs on US origin products</td>
</tr>
<tr>
<td>China</td>
<td>May 21, 2019</td>
<td>Applied from 5% to 20% additional tariffs on US products</td>
</tr>
<tr>
<td>China</td>
<td>June 16, 2019</td>
<td>Imposed 5% and 10% additional tariffs on US products</td>
</tr>
<tr>
<td>China</td>
<td>September 1, 2019</td>
<td>Suspended the imposition of bilateral additional tariffs on US origin products</td>
</tr>
<tr>
<td>US-China</td>
<td>December 13, 2019</td>
<td>Suspected additional tariffs on US origin products</td>
</tr>
<tr>
<td>China</td>
<td>December 15, 2019</td>
<td>Reduced tariffs from 10% to 5% on Brazil nuts, cashews, almonds, macadamias, etc.</td>
</tr>
<tr>
<td>China</td>
<td>February 14, 2020</td>
<td>Opened a round of tariff exclusions for additional tariffs on US pistachios</td>
</tr>
<tr>
<td>EU</td>
<td>March 2, 2020</td>
<td>Applied additional 25% tariffs on US cranberries</td>
</tr>
<tr>
<td>Turkey</td>
<td>May 21, 2019</td>
<td>Reduced to 10% additional tariffs on US origin products</td>
</tr>
<tr>
<td>India</td>
<td>June 16, 2019</td>
<td>Applied -20% extra tariffs on US almonds and walnuts</td>
</tr>
<tr>
<td>US-China</td>
<td>December 13, 2019</td>
<td>Reached a Phase One Economic and Trade Agreement to reduce tariffs</td>
</tr>
<tr>
<td>China</td>
<td>March 23, 2021</td>
<td>Would apply additional tariffs on US cranberries</td>
</tr>
</tbody>
</table>

Figure 1. Summary of the latest countervailing measures to US products

<table>
<thead>
<tr>
<th>Country</th>
<th>Event Date</th>
<th>Action Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chile-Argentina</td>
<td>March 22, 2019</td>
<td>Signed an Agreement of Economic Complementation to promote bilateral trade and investment</td>
</tr>
<tr>
<td>EU-Vietnam</td>
<td>June 28, 2019</td>
<td>Signed a Free Trade Agreement and an Investment Protection Agreement</td>
</tr>
<tr>
<td>EU-Singapore</td>
<td>October 17, 2019</td>
<td>Free Trade Agreement entered into force, removed nearly all tariffs and simplified customs process</td>
</tr>
<tr>
<td>US-Japan</td>
<td>January 1, 2020</td>
<td>Trade Agreement entered into force eliminating or reducing tariffs on several nuts and dried fruits</td>
</tr>
<tr>
<td>US-China</td>
<td>January 15, 2020</td>
<td>Signed a Phase One Trade Deal which de-escalates bilateral trade tensions</td>
</tr>
<tr>
<td>EU-Mercosur</td>
<td>March 30, 2019</td>
<td>Reached a political agreement for an ambitious and comprehensive trade deal</td>
</tr>
<tr>
<td>China-Mauritius</td>
<td>November 21, 2019</td>
<td>Signed a Free Trade Agreement which covers trade in goods and services, investment and economic cooperation</td>
</tr>
<tr>
<td>US-Mexico-Canada (USMCA)</td>
<td>January 1, 2020</td>
<td>Signed a new agreement which is expected to strengthen North American trade in agriculture</td>
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<tr>
<td>US-Morocco</td>
<td>January 15, 2020</td>
<td>Free Trade Agreement eliminated tariffs and quotas on US almonds</td>
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Figure 2. Some of the most relevant Free Trade Agreements signed or entered into force over the last year
Stakeholder Meetings

CELCAA Conference
INC attended the conference “Beyond trade for all: Time to promote the benefits of agri-food trade” organized by the European Liaison Committee for the Agricultural and Agri-Food Trade (CELCAA), on March 21, 2019, in Brussels. The conference brought together speakers from the European Commission and different European associations with the aim of providing different trade views and recommendations of the EU agri-food traders’ community to the EU decision-makers.

International China Tree Nuts Conference
The China Chamber of Commerce (CFNA) organized the 2019 China International Tree Nuts Conference, held in Zhengzhou, Henan Province, China from August 5-7. INC Chairman, Mr. Michael Waring presented an overview of the core activities of the INC during the opening ceremony, followed by Mr. Pino Calcagni, Chairman of the Statistics Committee, who presented a global statistical review of the tree nut industry, focusing on China and trade tariffs.

EC SPS Market Access Working Group Meeting
On April 3, 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 visits planning, training events organized by the BTSF (Better Training for Safer Food) program, and the Commission’s initiatives for promoting EU agri-food products. In addition, a review of trade figures of the agri-food products was presented, highlighting the ninth consecutive year of agricultural trade surplus.

UNECE-FAO Conference, Sustainable Natural Resources
INC participated at the conference “Sustainable Natural Resources and their Value Chains” organized by the United Nations Economic Commission for Europe and the Food and Agriculture Organization of the United Nations, in Geneva, on June 25. Experts from the public and private sectors, international organizations and NGOs highlighted the contribution of wild or forest nuts to sustainable development including biodiversity, local communities, employment generation, natural resources management and supply chain integration.

UNECE-FAO Conference, Food Loss and Waste
On November 20, INC attended the conference “Food Loss and Waste and the Sustainable Development Goals” in Geneva. The United Nations Economic Commission for Europe and the Food and Agriculture Organization hosted this meeting of experts to discuss potential means and policy tools to reduce food waste, including food security, systematic recording of data, integrated food management systems for cities and climate action.

FRUCOM Open Discussion Round
FRUCOM presented an update on their main activities, plans and objectives during the Open Discussion Round of November 21. The update was followed by a discussion among members about sustainability, aflatoxins, pesticides (chlorate in particular) and the phytosanitary certificate, among others.

European Trade Meeting
INC was present at the European Trade Meeting organized by the Waren-Verein der Hamburger Börse e.V., on November 22, in Hamburg. More than 100 participants from the nut and dried fruit sector learned about trade 4.0, trade conflicts, US and Chinese trade policies, blockchain technology and sustainability.
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 Pecan Council
- American Peanut Council
- American Pistachio Growers
- 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
- Centro Nacional de Competências dos Frutos Secos (National Center for Tree Nuts of Portugal)
- 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)
- Raisins South Africa
- 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.