ANNUAL REPORT
2020 / 2021
Dear Friends,

It is my pleasure to present the 2020/2021 Annual Report of the International Nut and Dried Fruit Council.

During this past year we have been met with many challenges and obstacles as a result of the COVID-19 pandemic. The nut and dried fruit industry has remained resilient and continued to progress, demonstrating the strength of the sector.

The INC made the decision to convert the 2021 World Nut and Dried Fruit Congress to a virtual 3D Online Conference which took place in May 2021. INC postponed the in-person Congress in Dubai being to May 11-13, 2022. I would like to thank the continued dedication and work of the Dubai Organising Committee, chaired by Mr. Ashok Krishen, to ensure an incredible event for the industry in 2022.

Throughout 2020 and 2021, the INC successfully adapted to the “new normal”. We organised online events for its members. And in June 2020, we hosted our first online event with the INC Webinar Series. November 2020 saw the first INC Online Conference, bringing together over 1350 participants from 85 countries. Attendees received an all-around look into the nut and dried fruit industry utilizing regional working groups, keynote speakers, knowledge sessions, sponsor sessions, and a virtual exhibition. INC additionally, provided members with webinars covering the topics of negotiation, the INC Short Form Contract, risk management, shipping challenges, and an outlook for the nut and dried fruit industry were launched.

Aiming to increase the global consumption of nuts and dried fruits, the INC launched the dissemination campaign, Real Power for Real People. This program connected nuts and dried fruits to attitudinal immunity, one’s ability to resist negativity. The campaign was a wonderful success with the main video garnering over 1.7 million views on YouTube. Alongside the campaign, the INC worked to develop a trend research project which identified three key health categories as potential opportunities for nuts and dried fruits. The project revealed the trends of energy boosting foods, digestive healthy foods, and foods supporting the immune system.

Recognising the importance of sustainability to our industry, the INC formed a new Sustainability Committee which will put a direct focus and emphasis on improving sustainable practices within the nut and dried fruit industry and correct communication to the market.

Executing the INC’s mission we provided funding to the industry to promote nuts and dried fruits worldwide. In 2020, a total of six INC-funded studies were ongoing and through the Call for Promotion and Dissemination Projects, two additional projects were given funding. Over the last eight years, the INC has provided more than 3.6 million euros for various projects aimed at promoting our industry.

INC introduced a new and improved INC Academia program. Four new courses, Arbitration Rules, International Market Opportunities, Cross-cultural Negotiations, and Risk and Insurance were created to form the new Specialized Elective Track, giving students a personalised learning option. As in previous editions, students continue to have the option to complete the Executive Program on Nuts and Dried Fruits.

I would like to thank the Reus Executive team lead by Mrs. Goretti Guasch for their resilience and commitment to their work. Thank you to members for their continued support of the INC. I truly hope that we will all be together again soon.

Sincerely,

Michael Waring
The INC mission is to stimulate and facilitate sustainable growth of the global Nut and Dried Fruit Industry, and the rapidly growing demand for sustainable and clean products is undeniable. While this represents a great challenge for our industry, it also gives way to countless opportunities. For this reason, the INC has identified 9 Goals from the 17 Sustainable Development Goals set forth by the UN in which our industry can impact. As the official representative of the global nut and dried fruit industry in front of the UN, and with a membership that represents over 80% of the world’s commercial “farm gate” value of trade in nuts and dried fruits, the INC is positioned to aid the sustainable growth of the sector and help achieve the SDGs. Moreover, we are establishing a new international working group formed by both academic and private sector experts to advise and oversee the development of the INC Sustainability Agenda, and to explore opportunities for collaboration that will yield long-term benefits for the industry.

The INC also supports sustainable activities through funding a Call for Scientific Proposals that promotes research on improving how nuts and dried fruits are grown in a safe and sustainable manner. This grant serves as a direct method to enhance sustainability within the industry and is just one of the many examples of how the INC is setting the pattern for sustainability in the sector.

As is known, the INC strives to continuously promote the global consumption of nuts and dried fruits, and with low raw material prices and a decline in nut and dried fruit consumption, this topic continues to grow in importance. Due to the success of last year’s dissemination campaign, Real Power for Real People, in which millions of consumers were reached and shown the “real power” of nuts and dried fruits and its connection to “attitudinal immunity”, the INC will launch a second part of the campaign in 2021 and 2022 to promote international nut and dried fruit consumption. New audiences such as foodies, gamers, athletes, and artists will be targeted to spread the message and with digital media channels, we will aim to inspire consumers to include nuts and dried fruits in their daily diets.

Linked to the promotion of nuts and dried fruits, the INC will launch a Call for Promotion and Dissemination Projects for 2021 with the aim to fund projects that build consumer demand for nuts and dried fruits whenever such projects are beyond the scope of the INC.

Another priority of the INC is health and nutrition, and to help circulate new findings among health professionals. With this commitment, we are happy to organize and host the scientific conference “Nuts 2022: Where we are and where are going in research” at the INC Headquarters. The event will provide a series of presentations and a final discussion on future lines of research for nuts and dried fruits by internationally prominent figures in nut-health research.

The INC also remains committed to monitoring, collecting, and sharing statistical data for the industry. This commitment, which includes data on production, consumption and international trade, provides unparallel insights and serves as an invaluable tool for members. Additionally, the INC continues to cooperate with international and supranational institutions as the official representative of the nut and dried fruit industry.

I want to express my sincere gratitude for your continued support and contribution to the nut and dried fruit industry through the INC.

Sincerely,

Goretti Guasch
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 sustainability, 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 850+ member companies from 80+ 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

- Up to 30% discount on registration fees for the Annual World Nut and Dried Fruit Congress and exclusive sponsorship opportunities.
- Network with top industry professionals and gain access to over 1,300 congress delegates through the Online Meeting Point.

INC Online Events

- Attend exclusive INC Webinars and access the recorded sessions through the members area of the website.
- Take part in Online Conferences, connecting the nut and dried fruit industry virtually and providing knowledge, updates, and insights with the click of a button.

INC Short Form Contract

- Access to the INC Short Form Contract to deal with the main concerns during international operations, in a simple, balanced and transparent manner.
- Simplify the sale and purchase process and have flexible Terms & Conditions and arbitration.

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: Executive Program on Nuts and Dried Fruits

- Learn the basics of the nut and dried fruit industry at discounted rates or take specific courses to bolster your knowledge. The Executive Program includes 10 online units with over 40 videos and an optional on-site course. The Specialized Elective courses provide targeted learning to match your needs.
- Students who enroll in the full course (online and on-site) can also save 50% on INC Congress Registration.

Online Statistics Database

- Access 450,000+ 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, which provides 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 finds, government regulations, press reviews of international media promoting the health benefits of nuts and dried fruits, COVID-19 updates, as well as consumer trends and recipes.
**LEADERSHIP**

**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.

- **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
- **Mike Hohmann,** The Wonderful Company, USA
- **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.**, Crisolar Nuts, S.L., Spain
- **Christina Chen,** Qiaqia Food Co. Ltd., China
- **Jan Vincent Rieckmann,** August Töpfer and Co. (ATCO Group), Germany
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
- 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
- Pratap Nair, Vijayalaxmi Cashew Company, India – Board Member
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain - Board Member
- Goretti Guasch Secretary General and Executive Director

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 Martí, Spain
- Walter F. Payne, USA
- Abbas Rafii, Luxembourg
- Don Soetaert, USA
- James Swink, USA
- Frank Vaerewijck, Belgium
- Doug Youngdahl, USA

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 Sumer, France
- Jan Vincent Rieckmann, Germany
- Catherine Balamoutsos, Greece
- Raju Bhatia, India
- Pankaj Sampat, India
- Vitali Levi, Israel
- Yossi Mussafi, Israel
- Behrooz Agah, Iran
- Alessandro Annibali, Italy
- Hidemitsu Honda, Japan
- Kazuo Julian Tagawa, Japan
- Mohammad Abu Odeh, Jordan
- 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
- Tomasz Szafarczyk, Poland
- Andrei Vassine, Russia
- Amit Khirbat, Singapore
- Alan Sutton, South Africa
- Alex Whyte, South Africa
- Miquel Borràs, Spain
- Stefan Boden, Sweden
- Varee Phophonhaisan, 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

Emeritus:
Formed by honorary former members of the Executive Committee and the Board of Trustees, who have dedicated their time and expertise to both the INC and the nut and dried fruit industry.

- Berton Steir, USA
In 2015, the UN established a total of 17 Sustainable Development Goals (SDG) to be achieved by 2030. Food and agriculture can help achieve multiple SDG, especially those related with poverty, nutrition, economic growth and the environment.

The INC has identified 9 SDG that the nut and dried fruit industry can have an impact on:

- **Goal 2:** End hunger, achieve food security and improved nutrition and promote sustainable agriculture
- **Goal 3:** Ensure healthy lives and promote well-being for all at all ages
- **Goal 4:** Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
- **Goal 7:** Ensure access to affordable, reliable, sustainable and modern energy for all
- **Goal 9:** Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
- **Goal 12:** Ensure sustainable consumption and production patterns
- **Goal 13:** Take urgent action to combat climate change and its impacts
- **Goal 15:** Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
- **Goal 17:** Strengthen the means of implementation and revitalize the global partnership for sustainable development
The INC conducted a survey among Ambassadors and members of the Sustainability, Scientific and Government Affairs Committee and Statistics Committee aiming to provide an overview of the industry’s sustainability-oriented programs—to have a general picture of the sector.

Overall results showed that good farming practices are being implemented all over top nut and dried fruit producing countries, as farmers became more aware of their impact in the environment. Water use is being improved through more efficient irrigation systems, and more efficient varieties—in terms of use of resources— are being cultivated. Moreover, renewable energies are being implemented in farms and production facilities, and by-products are being repurposed, reducing waste and, indirectly, CO2 emissions.

The results of the survey are available online to INC members only.

On November 18, 2020, the INC held a scientific webinar with prominent figures, with the focus of the session on sustainability and the impact of technology on food safety.

The webinar counted with Mr. Maciej Golubiewski, Head of Cabinet of the Commissioner for Agriculture of the European Commission, Ms. Diane Holdorf, Managing Director of Food & Nature, World Business Council for Sustainable Development, Mr. John Carter, Area Europe Quality Director of Ferrero, and with Mr. Pino Calcagni, Chairman of the INC Sustainability, Scientific and Government Affairs Committee, as the moderator of the meeting.

We learned about sustainability through the European Green Deal and Farm to Fork Strategy of the European Commission, and how it aims to build a sustainable agricultural supply chain. Continuing with sustainability, we also heard about the most recent developments in agro-sustainability, and, lastly, the session presented insightful looks into food quality and the role of technology.
What We Do
INC Congress Dubai

In 2020, with the onset of the COVID-19 global pandemic, the INC decided to reschedule the Congress that was set to take place in Dubai. The next INC Congress will take place May 11-13, 2022 at the same luxurious location, the Madinat Jumeirah resort. The safety of our congress participants is the number one priority and we are committed to providing an environment that is conducive for business and safety. In lieu of the in-person congress in 2020, the INC held various online events.

INC Webinar Series

From June 1-12, 2020, the INC hosted the first ever INC Webinar Series and successfully gathered over 1,500 industry professionals from 75 different countries. The webinars, which were led by industry experts, highlighted how the nut and dried fruit industry was affected by COVID-19 and provided participants with an industry outlook for the short- and long-term.

The webinar series included an individual session for each product under the INC umbrella and aimed to provide members with a high-value experience with professional insights into the nut and dried fruit industry.

INC Webinar Series by the Numbers

- **1,540** PARTICIPANTS
- **4,670** SESSION VIEWS*
- **75** COUNTRIES
- **56** EXPERT SPEAKERS
- **12** PRODUCT SESSIONS

*Including both live views and YouTube views
INC Online Conference

November 17–19, 2020 saw the first INC Online Conference where thousands of attendees from around the world gathered to showcase what can be accomplished as a united sector. The conference feature leading industry experts, internationally respected keynote speakers, a 3D virtual exhibition hall, and more!

INC ONLINE CONFERENCE
BY THE NUMBERS

- 1,368 attendees
- 5,766 session views*
- 85 countries
- 25 sponsors
- 3 nut & dried fruit working groups
- 3 keynote speakers
- 3 knowledge sessions
- 8 sponsor sessions

*Including INC Sessions and Sponsor Sessions, both live views and YouTube views
VISITORS BY REGION

NORTH AMERICA
21% 291 VISITORS

EUROPE
39% 539 VISITORS

ASIA
11% 145 VISITORS

LATIN AMERICA
8% 115 VISITORS

MIDDLE EAST AND AFRICA
18% 242 VISITORS

OCEANIA
3% 36 VISITORS

COMPANIES BY ACTIVITY

27% Manufacturers
Suppliers: Nuts and Dried Fruits and Machinery

29% Traders: Export, Import and Brokers

32% Retailers

1% Others: Confectionery, Paste and Other Snacks

10% Professional Bodies
The expert-led Working Groups for Americas, Europe, Middle East and Africa, Asia and Oceania discussed current nut and dried fruit supply and demand, trends, and shifting consumption patterns within the context of COVID-19.

Javier Solana, Alan Oster, and Haim Israel were the event’s three keynote speakers. With their internationally renowned reputations, they each provided intriguing insights ranging from global politics, the international economy, and the rapidly transforming world we live in.

The Knowledge Sessions, with webinars on topics like Scientific & Regulatory, Nutrition & Research, and Industry Marketing, gave participants insights into some of the most pressing topics in the nut and dried fruit industry. Each session was joined by a panel of topical experts to ensure the highest quality information.

This online conference also saw the introduction to sponsor sessions. Event sponsors were permitted to host an informational session to market their company or a product. These sessions allowed direct access to the event’s participants and provided the opportunity for these companies to showcase themselves.
INC Webinars

NEGOTIATION IN TIMES OF CRISIS
AN INC WEBINAR

On July 22, 2020, INC hosted the Negotiation in Times of Criss webinar led by Prof. Dr. Kandarp Mehta, a senior lecturer at IESE Business School, Barcelona. Prof. Dr. Mehta explored how individuals and companies can successfully negotiate when facing a crisis, such as the COVID-19 pandemic. In difficult situations, the importance of a leader, entrepreneur, or manager’s negotiation ability can affect the outcome and set the trajectory for the company.

INTRODUCTION TO THE INC CONTRACT
AN INC WEBINAR

On December 2, 2020, saw the launch of the Introduction to the INC Contract webinar. Chaired by former INC Chairman Giles Hacking, the session dove into the new INC Short Form Contract for use by INC Members, and opened the floor for discussion on arbitration and contractual subjects in the industry. Mr. Hacking was joined by members of the INC Business Integrity Committee, representatives from top arbitral organizations, and a representative from law firm Clyde & Co.

MITIGATING RISKS AND PROTECTING YOUR COMPANY’S REPUTATION IN 2021
AN INC WEBINAR

On February 16, 2021, the INC held a webinar led by the global insurance firm Aon discussing the risks facing companies in 2021. Alongside Joan Fortuny, member of the INC Board of Trustees, Aon experts Ciara Jackson, José María Segón, Kary Yates, and Karl Curran led the discussion on cyber risk, product contamination policy and company governance, and showed how companies can mitigate these risks to protect their reputation.

SHIPPING CHALLENGES IN A COVID-19 WORLD, AN INTERVIEW WITH MSC
AN INC WEBINAR

The INC hosted a webinar on the challenges facing the shipping industry on March 11, 2021. INC Vice Chairman and Chairman of the Sustainability, Scientific, and Government Affairs Committee, Pino Calcagni interviewed Corrado Carosella, Trade Manager of the Mediterranean Shipping Company (MSC) and discussed topics such as shipping prices over the past year, congestion issues, and the shipping industry’s approach to sustainability.

INDUSTRY LEADERS’ OUTLOOK FOR NUTS & DRIED FRUITS: A YEAR SINCE COVID-19
AN INC WEBINAR

On April 26, 2021, the INC organized a webinar for members focusing on the outlook for the nut and dried fruit industry, one year into the COVID-19 global pandemic. Industry leaders from the Americas, Europe, and Asia provided their insights and perspectives on the state of the industry and what the coming years might look like. The panel discussion centered on what changes have arisen due to the pandemic and the future prospects.
INC TO ATTEND ANUGA 2021

The INC has plans to attend Anuga 2021 in Cologne, Germany, from October 9-13, 2021. Over a year has passed with limited or no in-person events around the world, but with Anuga 2021, the INC is making its return to in-person trade shows. The INC will host a reduced Pavilion of 277.50 square meters with the capacity to accommodate 14 co-exhibitors.

As in previous years, the INC Pavilion will be located in the same area which boasts high traffic and provides co-exhibitors with a great opportunity to expose their brand to the thousands of expected participants.

With new heightened safety measures, Anuga 2021 and the INC Pavilion provide a great occasion to return to in-person events and take advantage of the networking, business opportunities, and other invaluable benefits!

SIAL 2020 RESCHEDULED TO 2022

Taking into account the global health situation which began in 2020, SIAL was forced to reschedule their event from 2020 to 2022. The next edition of SIAL will now take place on October 15-19, 2022 in Paris and INC has intentions to participate with a Pavilion, along with co-exhibitors.

With thousands of expected visitors in 2022, SIAL Paris will continue to provide members a great opportunity to connect with other nut and dried fruit companies, as well as network with new and existing business partners.

More information will be made available to INC members as SIAL 2022 approaches, so stay on the lookout!
The third edition of the INC Academia closed on November 30, 2020, with a total of 53 students from 26 countries, up 8 percent over the previous edition, and up 26 percent compared with the first. The Executive Program on Nuts and Dried Fruits continues to stand the test of time, and keeps growing and improving with new digital courses and more options for students.

In February 2021, the INC launched the fourth edition of the Executive Program on Nuts and Dried Fruits and this year is not like any other year. Brand new to the INC Academia in 2021 are two tracks that can be personalized.

The General Industry Track is the executive program that offers basic overview of the entire nut and dried fruit industry. The track covers many aspects of the industry providing the perfect introduction to getting started in the nut and dried fruit business. The program consists of 12 units, of which 10 are required, and the remaining two can be selected from the Specialized Elective Track. The 10 required units cover topics like soil and climate, varieties, nutrition facts, processing, food safety, quality standards, industry statistics and essential strategies for successful negotiations, among other subjects. The program (~50 hours) consists of reading materials, tutorial videos, self-assessment tests and a dossier, summary of the course.

The second option for students is the Specialized Industry Track. This track gives students a more specific and focused education. In this track, students have the option to freely select the courses they want to enroll in. There are four courses available covering arbitration rules, international market opportunities, cross-cultural negotiations, and risk and insurance.
Online Program’s Required Units

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.
5. Harvesting and 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 phosphine
   5.8. Storage
   5.9. Frying and dry roasting
   5.10. Flavoring
6. Retail packaging and 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
   6.7. Nut allergies—an update on current evidence and practice
8. Production, trade and consumption. Global review of industry statistics, including production, trade and consumption volumes.

Specialized Elective Courses

1. Arbitration rules. Overview of arbitration rules, procedures and tribunals, as well as defaults and contract related issues. This course includes a review of the INC Short Form Contract.
2. International market opportunities. Recent consumer trends related to health and wellness.
4. Risk and insurance. Essential knowledge of the hot topics of most concern in the food and beverage industry, and measures you can take to minimize or mitigate this risk.

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Academia in figures
(2018-2020)

144 STUDENTS
37 COUNTRIES

Positions

25% OTHERS
36% CEO/DIRECTORS
38% MANAGERS
Newsletters

The INC sends out three main types of newsletters to spread updates, information, and knowledge to its members. The Industry Newsletter, sent weekly, is an update that contains pertinent insights for all industry members. The Consumer Newsletter, sent monthly, highlights recipes, blogs, and articles that show consumers the wonderful products that are nuts and dried fruits. And the Health Professionals Newsletter relays the most relevant health information to health professionals.

Statistical Yearbook

Published on a yearly basis, the INC’s Statistical Yearbook is a one-stop look into the production, trade, and consumption of nuts and dried fruits globally. The publication is made up of easy-to-read tables, graphs, and charts, providing an overview of all the products under the INC umbrella. The data goes back for the previous ten years, showing the trends and evolution of the industry.

Import Border Rejections Report

Another report that is published yearly is the Import Border Rejections Report. This INC publication provides a thorough account of the import alerts and notifications for nuts and dried fruits. The report focuses on Europe, USA, Japan, and Australia and contains graphics and data in order to help analyze the trends and monitor the causes and origins. The report also highlights the different RASFF notifications across the EU.
Nutfruit Magazine
The official voice of the nut and dried fruit industry.

Just as in previous years, the INC launched three issues of the Nutfruit magazine, in March, July, and November. The magazine continued to provide a variety of topics, insights, and content for the nut and dried fruit industry.

Nutfruit is the official voice of the industry and contains sections like Business News, Legal Update, Country Product Spotlight, and Global Statistical Review which are oriented to the market. Sections such as Health News, INC Congress, INC News, and Industry News give readers an overview of information related to nuts and dried fruits. Moreover, content from the sections Gourmet, A Chat with the Industry, and Feature Articles gives the Nutfruit magazine a touch of expertise where critically acclaimed chefs, industry professionals, and topic experts contribute invaluable content for readers of the magazine.

17,000+ ONLINE VISITS
6,000+ PEOPLE RECEIVE THE MAGAZINE NEWSLETTER
3,000+ CIRCULATION
Industry Funding
Research

In 2020, there were six INC-funded research projects being conducted in Australia, the Netherlands, Spain and the UK—five clinical trials and one epidemiological study. Of these, three studies were investigating the role of nuts in cognitive function; the others focused on nuts and obesity in children, a mix of nuts and dried fruits and exercise performance in athletes, and the effects of dried fruit on gut health.

There were important delays due to the impact of the pandemic, especially when the lockdowns hit in March, but most of the studies are expected to be completed by mid-2021.

To date, the INC has funded 16 research projects through the calls for research projects, resulting in 12 publications in scientific journals.

Publications:


Promotion and Dissemination

In 2020, the INC approved to fund the following projects through the Call for Promotion and Dissemination Projects:

- **Nuts about good health** by Nucis Italia, Italy
- **Get Real. Eat Dried Fruit** by Raisins South Africa, South Africa

Over the last eight years, the INC has provided 3.6+ million euros of funding for research and dissemination projects about the health effects of nut and dried fruit consumption.

Open Access Studies

The INC funded the Open Access publication of two studies in 2020:

- **Study protocol for a 9-month randomised controlled trial assessing the effects of almonds versus carbohydrate-rich snack foods on weight loss and weight maintenance.** Published in *BMJ Open*.
- **Effect of a 2-year diet intervention with walnuts on cognitive decline. The Walnuts and Healthy Aging (WAHA) study: a randomized controlled trial.** Published in *The American Journal of Clinical Nutrition*. 
Funding for INC NREF

The INC is one of the contributors to the International Tree Nut Council Nutrition Research & Education Foundation (INC NREF), a non-profit organization dedicated to promoting the health benefits of tree nuts and supporting nutrition research and education for consumers and health professionals throughout the world. Members include those associations and organizations that represent the nine tree nuts (almonds, Brazils, cashews, hazelnuts, macadamias, pecans, pine nuts, pistachios and walnuts).

INC NREF was formed in 1993, at a time when many health professionals and the media were recommending that people avoid nuts due to their fat content. As a result, leaders from the various tree nut industries decided to join forces and form the industry-funded INC NREF to support research on the potential health benefits of nuts.

Currently, INC NREF is funding research on the benefits of nut consumption on weight, cognition and metabolic syndrome.

In addition to supporting research, INC NREF is committed to educating health professionals, consumers and media about the health benefits of tree nuts. Each year the organization engages with health professionals at a variety of conferences, distributing tree nut fact sheets, recipe booklets and posters.

Nutrition Symposia

38th International Symposium on Diabetes and Nutrition

Because of the pandemic, the 38th International Symposium on Diabetes and Nutrition, previously scheduled for June 15-17, 2020, was moved to June 21-24, 2021, and it will be held virtually. The INC is sponsoring the session “Nuts, Diabetes and Metabolic Syndrome”.

This International Symposium brings together clinicians and researchers to present the latest advances in research in food, nutrition and diabetes, and to debate about this field of science. The program includes plenary sessions, panel discussions and debate, as well as oral communications and posters to encourage the integration and participation of young researchers.

The aim of the INC’s sponsored session is to grow and enrich the understanding of the effects of nut and dried fruit consumption on diabetes through exchange, learning and debate.

Nuts 2022

Nuts 2022, initially scheduled for June 18-19, 2020, will take place at the INC headquarters in 2022. This 1.5-day meeting will consist of a series of presentations and a final discussion on future lines of research by prominent figures in nut-health research from the five continents. Sponsored by the INC, Nuts 2022 will be chaired by Prof. Jordi Salas-Salvadó, Chairman of the INC World Forum for Nutrition Research and Dissemination.

Nuts 2022 will serve as an inflection point in nut and dried fruit research. It is motivated by the increasing number of studies regarding the health benefits of nuts and dried fruits, and the need to recapitulate and think about the future.

The preliminary program features ten sessions, including nuts and body weight, insulin resistance and diabetes, lipoproteins and dyslipidemia, gut health, inflammation and oxidation, cardiovascular disease, ageing and cognition, and cancer, as well as dried fruits and cardiometabolic and gastrointestinal health. The symposia will conclude with a debate on future lines of research, from reproductive health to environmental sustainability. More than 25 world-class academics and researchers are expected to challenge and question current and future research directions.
Real Power for Real People Campaign

With immunity at its core, the 2020/2021, Real Power for Real People campaign connected plant-based power, “real power”, with attitudinal immunity, an individual’s ability to resist negativity. Launched in October 2020, the message of attitudinal immunity reached a large international audience through the campaign’s main video, social media influencers, a toolkit for members, and the INC’s online community.

Combining attitudinal immunity and the health claim that a mix of nuts and dried fruits contain vitamin A, vitamin B6, selenium, zinc, iron, and copper, which contribute to the normal function of the immune system, consumers all over the globe were able to see the goodness of nuts and dried fruits.

As immunity-supporting foods continue to be a growing consumer trend, the 2021-2022 Global Dissemination Plan will build off of the success from Real Power for Real People while branching out to a wider audience, focusing on groups like foodies, gamers, athletes, and artists. The concepts of Real Power for Real People and attitudinal immunity will continue to be promoted and be taken to the next level with the goal of increasing global consumption of nuts and dried fruits.
Marketing & Communication
This trend research was conducted by the INC in collaboration with Ogilvy, a leading marketing agency, as part of the 2020-2021 Dissemination Plan in efforts to increase the global consumption of nuts and dried fruits while also circulating the health benefits.

Through the trend research, the INC identified three key areas of health, energy boosting, digestive health, and immune support, that have potential for the nut and dried fruit industry. Among these three areas, energy boosting and digestive health were the fastest growing trends. Immune support was identified as a key trend to watch due to the global pandemic and an increased importance on the immune health.

HEALTH AND WELLNESS POSITIONING - PAST AND FUTURE 5YR

Compound Annual Growth Rate (CAGR)
(Bubble size: Market retail value, Mil EUR)
Top 11 Markets Total: Australia, Brazil, China, Germany, India, Japan, Mexico, South Korea, Spain, United Kingdom, USA

Percentage of food, drink or healthcare launches featuring immunity-enhancing claim, from April 2015 to March 2020
In 2020, the INC created and published 14 Buddha Bowl recipes and videos. These recipes reflected growing gastronomical trends all around the world and in total received 490,000+ views on YouTube. In addition, 10 healthy breakfast recipes videos were published to YouTube to bring a total of 24 recipe videos for the year. During 2021, the INC will be working to convert these 14 Buddha Bowls into a recipe e-book to connect with consumers and further inspire people to incorporate nuts and dried fruits in their diets.

AÇAI BOWL WITH HAZELNUTS AND DRIED CRANBERRIES
GOLDEN BUDDHA BOWL WITH ALMONDS, CASHEWS, AND DRIED APRICOTS
GREK BUDDHA BOWL WITH MACADAMIA PESTO
INDIAN BUDDHA BOWL WITH CASHEWS & DRIED APRICOTS
MEXICAN BUDDHA BOWL WITH PINE NUTS, RAISINS, AND HAZELNUTS
PAPAAYA BREAKFAST BOWL WITH BRAZIL NUTS AND MACADAMIAS
RAMEN BUDDHA BOWL WITH PISTACHIOS AND DRIED CRANBERRIES
SALMON POKE BOWL WITH WALNUTS, ALMONDS, AND DRIED FRIGS
THAI TEMPEH BOWL WITH BRAZIL NUTS, PINE NUTS, AND APRICOTS
MASOOR DAL BUDDHA BOWL WITH DATES, WALNUTS, AND PECANS
PASTA SALAD BUDDHA BOWL WITH PISTACHIOS, PEANUTS, AND DRIED FRIGS
GREEK BUDDHA BOWL WITH MACADAMIA PESTO
CHIA PUDDING BOWL WITH PRUNES
GOLDEN BUDDHA BOWL WITH ALMONDS, CASHEWS, AND DRIED APRICOTS
MEXICAN BUDDHA BOWL WITH PINE NUTS, RAISINS, AND HAZELNUTS
PAPAAYA BREAKFAST BOWL WITH BRAZIL NUTS AND MACADAMIAS
RAMEN BUDDHA BOWL WITH PISTACHIOS AND DRIED CRANBERRIES
SALMON POKE BOWL WITH WALNUTS, ALMONDS, AND DRIED FRIGS
THAI TEMPEH BOWL WITH BRAZIL NUTS, PINE NUTS, AND PRUNES
INC Social Media and Websites

Social Media

This year, INC emphasized engagement across all social media channels to better connect with consumers, and as a result, the engagement has seen a substantial increase. Furthermore, follower growth also steadily grew throughout the year.

Facebook:
- 248,000+ Fans
- Engagement increased 3.5x
- Reach of 4.62M

Instagram:
- 29,000+ Followers
- Engagement increased 18%
- Reach of 18.5M

Twitter:
- 2,200+ Followers
- Engagement increased 2x
- 44,000 Impressions

LinkedIn:
- 5,800+ Followers
- Engagement increased 70%
- Reach of 8.14M

YouTube:
- 4,800+ Subscribers
- 2.8M+ Views
- 978.1K Impressions

Websites

In 2020, INC websites continued to be the hub of all information connecting the online nut and dried fruit community. Efforts this past year have been focused on creating captivating content for both the industry and consumers alike.

During 2021, the INC will complete a full re-design of its websites, providing an easier-to-navigate platform as well as increased useability.

Total Website Results

- USERS: 500,000+
- VISITS: 627,000+

Top Viewed Pages

- CONSUMERS WEBSITE: RECIPES
- HEALTH PROFESSIONAL WEBSITE: HEALTH RESEARCH
- INDUSTRY WEBSITE: STATISTICS
Press Releases

Aiding to spread the global visibility of the INC, in 2020, 4 press releases were sent out to international news media, INC ambassadors, and INC Partners. The press releases focused on two of INC’s online events, the June webinar series and the November Online Conference, both with statistical updates. Moreover, a press release was sent highlighting the Real Power for Real People campaign, along with the Consumer Trend Research. The most viewed release was the COVID-19 Update which received over 60,000 views.

An additional press release, ‘New Study Suggests: Australians Should Increase Their Nut Consumption’, was also sent to INC stakeholders in March, including the INC Ambassadors, Partners, and media contacts.

Online Advertising

As part of the INC’s marketing and communication plan, online advertising continued to play an important role. Through online advertising, the INC is able to promote the health benefits of nuts and dried fruits, generate visibility and growth among website and social media, and stimulate sustainable growth in the industry. Throughout 2020, investment was made to focus on consumers, health professionals, and industry campaigns.

Online Advertising Generated

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>51%</td>
<td>Of all website visits</td>
</tr>
<tr>
<td>48%</td>
<td>Of all visits to the consumer website</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4,400+</td>
<td>Visits to the industry website</td>
</tr>
<tr>
<td>8</td>
<td>Applications to be an INC member</td>
</tr>
</tbody>
</table>
Technical Projects
The goals of the Forum are to promote research and dissemination projects, to disseminate the latest research findings worldwide, and to promote calls for research and dissemination projects. The Forum recommends research priorities and advises on scientific awards.

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

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
- Dr. Crystal Haskell-Ramsay, Northumbria University, UK
- Prof. Catherine Itsiopoulos, Murdoch University, Australia
- Dr. Karen Lapsley, Almond Board of California, USA
- Prof. Anoop Misra, Fortis Centre of Excellence for Diabetes, Metabolic Diseases & Endocrinology, India
- Ms. Maureen Ternus, INC Nutrition Research and Education Foundation, USA

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.
As the official representative of the global nut and dried fruit industry in international and supranational institutions like 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 for Europe (UNECE), and the European Commission, among others, the INC addresses critical issues that may pose a threat to the sustainable growth of the sector.

In 2020/2021, the INC participated in the following meetings and working groups:

- **Codex Alimentarius**: The INC participates, as observer, in different electronic working groups and committees.
  - Codex Committee on Processed Fruits and Vegetables (CCPFV): The INC participated in the revision of the Proposed Draft General Standard for Dried Fruits, including the annexes for raisins and dates.
  - Codex Committee on Contaminants in Food (CCCF): At the next session (online) on May 3-7, 2021, the Committee will discuss the proposed draft ML for total aflatoxins in ready-to-eat peanuts and associated sampling plan.
  - Codex Committee on Pesticide Residues (CCPR): The 52nd Session of the CCPR was postponed until July 2021. The Committee is expected to discuss the review of the International Estimate of Short-term Intake Equations (IESTI) and the establishment of Codex Schedules and Priority Lists of Pesticides.

- **UNECE**: The INC collaborates with the United Nations Economic Commission for Europe in the review of Agricultural Quality Standards for nuts and dried fruits. In 2020, the UNECE adopted the Revised Standard for Prunes; the Explanatory Guide for Dried Apricots; the Poster for Dried Figs; the Explanatory Posters for Walnut Kernels, Cashew Kernels, and Prunes; and adopted the UNECE Recommendations for Inshell Pecans and Pecan Kernels for a one-year trial period. The Revised Draft Standard for Inshell Peanuts and Peanut Kernels will be discussed during the UNECE Specialized Section meeting of June 2021.

- **European Commission**: The INC participated in the virtual meeting of the Market Access Working Group on Sanitary and Phytosanitary issues organized by the European Commission, on May 26, 2020. Representatives of European associations addressed specific problems and concerns related to the impact of COVID-19 in trade to the Commissioners.

- **EFSA**: The INC shared with the European Food Safety Authority the latest scientific studies published with regards to the metabolizable energy content of tree nuts. Recent findings show that some tree nuts have less calories than the quantity stated in some food databases, including the USDA FoodData Central Database.

These meetings provide valuable opportunities to discuss areas of particular concern to the industry, specifically in a context of trade barriers.

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**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. Uygün Aksoy**, Consultant, Turkey
- **Prof. Dr. Güner Arkun**, Istanbul Aydin University, Turkey
- **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. Cheng Hung Kay**, CHK Trading Co Ltd., China, Hong Kong
- **Mr. Agostino Improta**, Besana Group, Italy
- **Dr. Cameon Ivarsson**, Napasol 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 SA T**, Spain
- **Dr. Jochen Riehle**, Institut für Hygiene und Umwelt Hamburg, Germany
- **Ms. Miriam Willen**, Stahmann Farms Enterprises PTY LDT, Australia
- **Ms. Chen Ying**, China Chamber of Commerce, China
In 2020/2021, the INC paid special attention to the following issues:

- **Pesticides:**
  - **Fosetyl-Al:** The European Commission presented the mandate to EFSA on the joint review of MRLs for fosetyl and phosphonates, which includes references to both the current Acceptable Daily Intake (ADI) for phosphonic acid and the new, lower ADI derived in the procedure for the renewal of approval of fosetyl.

- **Contaminants:**
  - **Aflatoxins:** In March 2020, EFSA published the Scientific Opinion on Risk assessment of aflatoxins in food. After 209,802 analyses from 69,199 samples, the highest mean concentrations were found in ‘Legumes, nuts and oilseeds’ (particularly in pistachios, peanuts and other seeds), contributing up to 29% of the dietary exposure to aflatoxin B1 (AFB1) in adults. The Panel on Contaminants in the Food Chain considered that the impact of the uncertainties is moderate and that the assessment is likely to be conservative. EFSA recommended more studies on genotoxic potential and dietary exposure, as well as more data on occurrence.
  - **Ochratoxin A (OTA):** In October, the European Commission launched a stakeholder consultation on suggested possible new and revised maximum levels (MLs) for OTA in certain foods. As for nuts and dried fruits, the proposed MLs are: 8 μg/kg in dried vine fruit (currants, raisins and sultanas) and dried figs; 2 μg/kg in other dried fruit; 5 μg/kg in pistachios. At the time of writing this report, no conclusions had been made yet.
  - **Hydrocyanic acid:** In August, the European Commission opened a stakeholder consultation on the maximum limits (ML) for hydrocyanic acid in almonds. Following the outcome of the scientific opinion by EFSA, “Evaluation of the health risks related to the presence of cyanogenic glycosides in foods other than raw apricot kernels”, the EU Expert Committee on Contaminants proposed an ML for hydrocyanic acid in almonds (both bitter and sweet) at 20 mg/kg. At the time of writing this report, no conclusions had been made yet.

- **Additives:**
  - **Sulphites:** A mandate from the European Commission to EFSA to follow-up on the conclusions and recommendations of the Scientific Panel on Food Additives and Nutrient Sources Added to Food (ANS) opinion on the re-evaluation of sulphur dioxide-sulphites (E 220–228) is under preparation.
INC monitors import border rejections in Europe, USA, Australia and Japan, analyzing the trends, causes and origins.
In 2020, the total number of notifications in the European Union, the United States and Japan decreased from 2019 by 32.8%, 15.7% and 10.1%, respectively. On the contrary, the number of notifications in Australia increased by 27.5%. As for the previous year, the presence of aflatoxins was the main reason for notifying, especially in the case of nuts.
Statistics

The Statistics Committee assists the INC in collecting and evaluating a wide range of statistical data for dissemination to industry, governments, and the general public. The Committee also assists in the expansion of the INC statistical records range in order to gain a deeper understanding of the nut and dried fruit industry’s current state and adapt to new challenges.

- 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 online Database is a platform for INC members to explore historical and current data on nut and dried fruit production, supply, trade, and consumption worldwide. The database records cover about 450,000 entries from 1995 to today, which can be broken down by year, country, and product.

Three separate reports are available to access the database:
- Dashboard, which shows the industry’s scope on a world map based on production, imports, exports, and consumption data broken down by product and year.
- Advanced Search, which uses tables and charts to search annual data on production, stocks, trade, and consumption by country and product.
- Trade Data, which provides volume-wise market shares of exporting and importing countries through world maps, charts, and tables, ranging from a simple overview to a comprehensive breakdown (year, country, and product).
Statistical Yearbook

The 2020/2021 Statistical Yearbook, released in May, provides a review of tree nut, peanut, and dried fruit production, trade, and consumption over the last ten years. The publication first summarizes the world dynamics in production and consumption of each nut and dried fruit over the last decade, and then analyzes them in detail. These studies cover the following topics:

• Trends in production and country share: 10-years series, current season and 5-year average.
• Export, import and market share of leading players: 10-years series, current season and 5-year average.
• Variations in estimated consumption: 5-year series.

The data analysis indicates that the total production of tree nuts (kernel basis, except pistachios in-shell) has continuously risen in the last decade, reaching over 5.3 million metric tons in 2020/21, up by 65% from 10 years ago and 15% from the previous season. Last season’s largest crops were almonds with 31% of the world share, followed by walnuts and pistachios (19% each), cashews (16%) and hazelnuts (10%), respectively. Pecans, macadamias, Brazil nuts and pine nuts represented the remaining 5%. Concomitantly, tree nut exports (shelled, with exception of in-shell pistachios), also reflected a positive trajectory with an average growth of 103,000 MT per year, hitting over 2.9 million MT in 2019. Global consumption, estimated at 4.6 million MT, showed an annual growing trend of 181,000 MT/year, on average.

World peanut production in 2020/21 totaled over 47.5 million MT, a 7% increase over the previous season and a 33% increase over 2011/12, continuing the positive trend observed over the previous ten years. China accounted for 37% of the world crop, with India accounting for 14%. Nigeria (8%), the US (6%), Senegal, and Argentina (3% each) were the next leading producers. In 2019, total shelled peanut exports reached 2.4 million MT, and grew by an average annual rate of 136,000 MT over the last decade. Global demand, estimated at 42 million MT, increased at an average rate of 1 million MT per year between 2010 and 2019.

Similarly, dried fruit production has increased over the last decade, reaching 2.9 million MT in 2020/21, 22% above 2011/12. Dried grape production (raisins, Sultanas, and currants) accounted for 42% of global production, with table dates accounting for 35%. The remaining 23% was split into dried cranberries (7%), dried apricots (6%), prunes and figs (5% each). Dried fruit exports totaled approximately 2.8 million MT in 2019, increasing at a steady rate of about 130,000 MT/year. On average, overall consumption has risen by 80,000 MT per year.
On December 3, 2020, the INC Short Form Contract was introduced through a webinar chaired by Mr. Giles Hacking, former INC Chairman and current member of the INC Business Integrity Committee (BIC). Representatives from top organizations took part: Waren-Verein der Hamburger Börse e. V., NZV Netherlands, Nut and Dried Fruit Trade Association (NDFTA), DFA of California, Association of Food Industries (AFI) and California Almond Exporters Association (CEAE). These organizations are all supporters of the INC Short Form Contract and can be selected for arbitration when using the contract. Moreover, Ms. Tara Smith, a representative of the law firm Clyde & Co, and three more members of the BIC, Mr. Andrew Waring, Mr. Pratap Nair, and Mr. Stephen Meltzer joined the panel.

The INC Short Form Contract was created at the request of INC Members and in response to the needs of the sector. The contract was developed by the BIC taking into account INC Members’ best interests and in accordance with the INC Strategic Plan 2018-2023. The contract provides members with one single document without any conflicting terms that is simple, balanced, transparent, and flexible, which can be used in the sale and purchase of nuts and dried fruits, given that at least one party is an INC Member.

Advantages:

- Deal with the main concerns during international operations
- Provide certainty regarding contractual issues
- Simplify the sale and purchase process
- Brief
- Balanced
- Transparent
- Flexible Terms & Conditions and Arbitration
Highlights of the year:

• On March 5, 2021, the EU and the US agreed to a 4-month suspension on all retaliatory tariffs placed during the longstanding Airbus/Boeing dispute over aircraft subsidies. Reciprocal tariffs of around $7.5 and $4 billion on European and US exports were imposed during the last two years, impacting a wide range of products and foods, such as peanuts and dates, among others. As for Section 232 Steel and Aluminum tariffs, from June 1, 2021, the EU will apply higher tariffs to US goods under Annex II of Regulation (EU) 2018/886 of 20 June 2018, which includes dried cranberries, unless a negotiated solution is reached before then.

• Shipping costs skyrocketed due to lack of empty containers and delays for goods purchased from China. The COVID-19 pandemic has severely impacted access to containers and equipment. On March 11, 2021, the INC hosted the webinar, Shipping Challenges in a COVID-19 World – an Interview with MSC, with Mr. Corrado Carosella, Trade Manager from the Mediterranean Shipping Company, to dive deeper into the challenges and reasons for the large increase in shipping prices.

• On December 30, 2020, the EU and the UK reached a Trade and Cooperation Agreement (TCA). After years of intensive negotiations, a post-Brexit agreement was made on the terms of the future bilateral relationship after the end of the transition period. The agreement consists of three main pillars: a free trade agreement, a new partnership for citizens’ security, and a horizontal agreement on governance. The TCA has been applied provisionally since January 1, 2021, when the Brexit transition period ended, and extended until April 30, 2021.

• On November 15, 2020, Australia, China, Japan, New Zealand, South Korea, and the 10 ASEAN (Association of Southeast Asian Nations) countries (Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Vietnam) signed the Regional Comprehensive Economic Partnership (RCEP). The 15 countries that form the RCEP represent almost one-third of the world population and close to 30% of global gross domestic product (GDP). The deal will also represent nearly 28% of trade in the world.
Global Cashew Council

Through its digital media channels, website and social media, the Global Cashew Council’s dissemination plan has continued to focus on boosting engagement across all channels which was met with excellent results.

All social media channels saw an increase in engagement, but especially Instagram and Facebook which gained 335% and 505% respectively. Website traffic also grew by an incredible 463% with the recipes page of the website still proving to be the most popular page for the public.

In addition, the Global Cashew Council collaborated with influencers who shared their healthy cashew recipe videos to a combined follower base of over 368K and their posts gained a collective 58,890 interactions including likes, comments, saves and recipe views.

Also last year, the GCC collaborated with the United Nations Economic Commission for Europe (UNECE) in drafting the explanatory poster for cashews, Commercial and Marketing Quality of Cashew Kernels. The poster will be released after the revision of the UNECE Standard for Cashew Kernels in 2021.

Global Hazelnut Project

The INC keeps monitoring the brown marmorated stink bug (H. halys) situation in Turkey, Italy, USA, Georgia and Spain, thanks to the collaboration of a team of entomologists and agronomists that form the Global Hazelnut Project.

Last year the Italian government authorized the release of the samurai wasp (Trissolcus japonicus), which seems to be the most effective egg parasitoid of H. halys.

In the hazelnut producing Black Sea region of Turkey, monitoring of the pest continued in 2020. The Black Sea Agricultural Research Institute reported a decrease in pest population compared to when it was first seen in 2018.

Macadamia Council

The macadamia industry officially established a new World Macadamia Organisation in late 2020. The WMO consists of the national associations of member countries, including Australia and South Africa, and is tasked with stimulating demand for macadamias in existing and emerging markets as supply is expected to increase significantly over the next years.

The INC is coordinating a research funded by the macadamia industry, The Effects of Macadamia Nuts on Cardiometabolic Risk Factors and Adiposity: A Randomized Intervention Study, led by Dr. Joan Sabaté at Loma Linda University in California, USA. The global pandemic caused delays in the study, and Dr. Joan Sabaté and his team are expected to conclude the research in July 2021.
Stakeholder Meetings

FRUCOM WORKING GROUPS
Throughout the year the INC attends several meetings of the European Federation of the Trade in Dried Fruit, Edible Nuts, Processed Fruit & Vegetables and Processed Fishery Products (FRUCOM). In particular, the working groups and webinars on dried fruit and nuts, sustainability and mycotoxins, where FRUCOM members contribute to targeted stakeholder consultations on issues of special concern, from food safety (mycotoxins, pesticides, additives) and sustainability to trade and tariffs.

MARKET ACCESS WORKING GROUP ON SPS ISSUES
On May 26, 2020, the INC participated in the virtual meeting of the Market Access Working Group on Sanitary and Phytosanitary issues organized by the European Commission. Representatives of European associations addressed specific problems and concerns related to the impact of COVID-19 in trade to the Commissioners.

ABNC WEBINAR, THE IMPORTANCE OF NUT PRODUCTION AND CONSUMPTION
Mr. Antonio Pont, INC Honorary President and member of the Executive Committee and Board of Trustees, participated virtually in the webinar A Importância Crescente da Produção e Consumo Saudável de Nozes e Castanhas, co-organized by the Brazilian Association of Nuts and Dried Fruits ABNC, on June 9, 2020. Mr. Pont presented an overview of the core activities of the INC, followed by an analysis of industry statistics and highlights of the health benefits of nut consumption.

THE IMPACT OF COVID-19 ON QUALITY IN THE GLOBAL F&B INDUSTRY
The INC attended the European Networking Group (ENG) Global Food Safety webinar, ‘The impact of COVID-19 on quality in the global F&B industry’ on August 13, 2020. The session focused on contingency plans to ensure a secure supply chain, social distancing in food production, movement restrictions at borders, supply chain risk mitigation assessment, and communication management during the crisis.

15TH ANNUAL GLOBAL FOOD SAFETY SUMMIT
The INC attended the 15th Annual Global Food Safety Virtual Summit organized by the European Networking Group (ENG) on September 8-9, 2020. Participants analyzed the impact of COVID-19 on the food industry, shared experiences in building a strong quality & food safety culture throughout global organizations, how to implement technology in food safety and how to overcome the implementation challenges, fraud and fraud mitigation, and lessons learned during the COVID-19 crisis.

CHINA INTERNATIONAL TREE NUTS CONFERENCE
The China International Tree Nut Conference took place from September 9 to 11, 2020, in Qingdao, Shandong Province, China, under the auspices of the China Chamber of Commerce (CFNA). Mr. Pino Calcagni, INC Vice Chairman and Chairman of the Sustainability, Scientific and Government Affairs Committee and the Statistics Committee, presented (virtually) a global statistical review of the tree nut sector, with special focus on China, and INC dissemination plans for the promotion of nuts and dried fruits.

EUROPEAN COMMISSION, FARM TO FORK 2020 CONFERENCE
Focused on the Farm to Fork Strategy adopted in May 2020, the European Commission (EC) organized a virtual conference on October 15-16, 2020. High-level EC representatives shared and discussed different perspectives, challenges and opportunities of the transition to sustainable food systems. The event was a first opportunity to gather actors from public and private sectors to discuss the move towards sustainable food systems.

GLOBAL NUT PRESERVATION INDUSTRY ALLIANCE CONFERENCE
On November 12, 2020, INC Chairman, Mr. Michael Waring participated virtually in the ChaCha Global Nut Preservation Industry Alliance Conference. The presentation provided an overview of global market trends, nut and dried fruit production and trade, as well as INC marketing activities bound to build demand for the nut and dried fruit sector.

OECD, 79TH PLENARY MEETING OF THE FRUIT AND VEGETABLE SCHEME
The INC attended (online) the 79th Plenary Meeting of the Fruit and Vegetable Scheme of the Organisation for Economic Co-operation and Development (OECD), on December 9-10, 2020. The session focused on the results of a survey on the impact of COVID-19 on fruit and vegetables trade sent to country delegates, and the measures adopted by the UK due to Brexit concerning marketing standards.

FRUCOM TECHNICAL BRIEFING, EU-UK TRADE AND COOPERATION AGREEMENT
The INC attended an online technical briefing on the EU-UK Trade and Cooperation Agreement (TCA), organized by the European Federation of the Trade in Dried Fruit, Edible Nuts, Processed Fruit & Vegetables and Processed Fishery Products (FRUCOM) on March 3, 2021. The meeting focused on various technical aspects of the TCA, particularly regarding the provisions on Rules of Origin, Organics, and Sanitary and Phytosanitary (SPS) checks.

INTERNATIONAL YEAR OF FRUITS AND VEGETABLES, LAUNCH EVENT
The INC was invited to participate in the official launch of the International Year of Fruits and Vegetables 2021, organized by the United Nations General Assembly and the FAO as the lead agency. This represented a unique opportunity to raise awareness on the important role of fruits and vegetables in human nutrition and, as well, in achieving the UN Sustainable Development Goals.

INTERNATIONAL DAY OF FORESTS
This year the International Day of Forests, March 21, was celebrated under the theme “Forest restoration: a path to recovery and well-being”. The INC collaborated with the United Nations Economic Commission for Europe in the creation of a short video documentary on wild nuts health properties and contribution to sustainable livelihoods.
National Associations

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.

Aegean Exporters Association
Almond Board of Australia
Almond Board of California
American Pecan Council
American Peanut Council
American Pistachio Growers
Associação Brasileira de Nozes, Castanhas e Frutas Secas [Brazilian Association of Nuts and Dried Fruits]
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
California Almond Exporters Association
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]
Chilean Prunes Association
Chilean Walnut Commission
Chilenut
China Chamber of Commerce for Import and Export of Foodstuffs
China Tree Nut Association
ComCashew
DFA of California, Safe Food Alliance
European Federation of the Trade in Dried Fruit, Edible Nuts, Processed Fruit & Vegetables, Processed Fishery Products
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
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
Raisins South Africa
Spanish Almond Board
Spanish Association of Almond Shellers
Spanish Association of Nuts and Carobs
TechnoServe
The Peanut Institute
Tree Nut Growers Association of Malawi
UK Nut and Dried Fruit Trade Association
Ukrainian Nut Association
US Association of Food Industries
US National Pecan Shellers Association
US Peanut and Tree Nut Processors Association
Vietnam Macadamia Association
Waren-Verein der Hamburger Börse e.V.
World Macadamia Organisation