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THE VOICE OF THE INC FOUNDATION FOR THE NUT AND DRIED FRUIT WORLD

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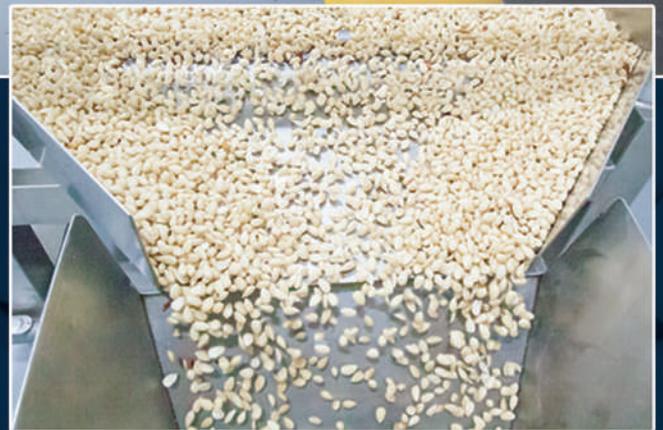
INC PAVILION ANUGA 2021

The INC's Return to In-person Events

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INC Executive Committee Discusses the Future of the Industry



MICHAEL WARING
INC CHAIRMAN

As we near the end of the 2021 calendar year, a look back at the previous year for nuts and dried fruits can give us a glimpse of what to expect for the future. In September, the INC Executive Committee came together to hold a webinar on the future of the industry, and discuss some of the most pressing and important topics for the sector. Despite the many challenges that have been presented over the past year, nuts and dried fruits have been resilient. Driven by more health-conscious consumers, we saw consumption increase in many markets around the world, and new consumers were introduced to nuts and dried fruits, enjoying them as a snack or as an ingredient.

The webinar also highlighted just a few of the many ways that the nut and dried fruit industry can support the United Nation's Sustainable Development Goals (SDGs). Today, sustainable practices within the industry have become a necessity and we know that we need to continue to invest our time and our efforts in sustainability and work on these questions that are put to us as an industry. And of course, it goes without saying that the shipping crisis we are experiencing is unprecedented, but with time, there is belief that the supply chain will return to a sense of normalcy.

We are also pleased to announce that this past October, the INC made its official return to in-person events, with the INC Pavilion at Anuga in Cologne, Germany. A total of sixteen member companies joined, and the pavilion served as the main meeting point for the entire sector. This past October also saw the second of three planned INC Webinars, "Consumption Trends in the Nut and Dried Fruit Industry", which saw Alfonso Marian, President of Ogilvy Spain and former Chief Creative Officer of Ogilvy USA, and Nuria Moreno, Director of OOH and Usage Panels for Kantar. The webinar chaired by Pratap Nair, member of the INC Executive Committee, shared the latest trend research on consumption in the food industry, and how to build a clear and concise marketing strategy.

Looking forward to the coming months, there are many reasons to be excited. The last week of November, the INC is

planning a webinar that will cover some of the biggest issues for the industry such as the shipping and logistic crisis, as well as energy. Moving into 2022, the INC Pavilion will once again return to Gulfood in February, and most importantly, from May 11-13, 2022, the INC Congress is set to return at the magnificent Madinat Jumeriah Resort in Dubai. The congress will convert Dubai into the center of the nut and dried fruit business, and we are excited to bring the sector together under one roof again.

The continuation of the Real Power for Real People campaign is now well under way and so far it has been a great success. The campaign remains centered on promoting the message that nuts and dried fruits can give you power to get through each day's challenge. So far, the campaign's six short videos have accumulated more than 4.1 million views and the total interactions from social media are over 245 thousand.

INC remains committed to increasing sustainable practices within the nut and dried fruit industry, and on this note, we are pleased to announce the formation of a new Sustainability Working Group which will be chaired by INC 2nd Vice Chairman, Pino Calcagni. The first meeting of the new Working Group was held on October 19, and focused on what tangible actions the INC can support to further sustainable actions within the sector.

As an industry, there are many challenges and opportunities to come, and the importance of coming together as a sector to address them cannot be understated. The INC continues to play a critical role in this regard, allowing the sector to form a united front.

I look forward to meeting with you all again soon, and as always, thank you for your continued support of the INC Foundation.

Yours sincerely,

Michael G. B. Waring

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New Corporate Branding For Olam Food Ingredients (ofi)

A global leader in natural and sustainable food ingredients and solutions, Olam Food Ingredients (ofi) has revealed a new corporate brand. The identity taps into themes and colors which reflect ofi's ability to drive innovation in all areas of its business to deliver more growth and impact for customers.

Shekhar, CEO of ofi, said: "The new ofi brand carries the strong origination and supply chain heritage of Olam but equally signals our exciting aspirations for the future. It conveys the distinct and accelerated changes being made in the business to continuously improve and deliver a differentiated customer value proposition."

"We are innovating across all areas of our business, right from plant to palate. Ongoing investments in application development and R&D expertise will unleash the full natural potential of our highly complementary portfolio to deliver further value-added ingredients and solutions for our customers. At the farm level, we are investing further to deepen the physical and digital presence in sustainable sourcing that we are already well known for. We are also increasingly helping our customers to fast track their journey to net zero, providing specific programs for carbon reduction by working closely with smallholder farmers and other communities across the chain." 🟩



Nestlé Unveils Plans to Support the Transition to a Regenerative Food System



Nestlé has laid out its plans to support and accelerate the transition to a regenerative food system –one that aims to protect and restore the environment, improve the livelihoods of farmers and enhance the well-being of farming communities. Nestlé will work with its food system partners, including the company's network of more than 500,000 farmers and 150,000 suppliers, to advance regenerative farming practices at the heart of the food system. As part of this journey, the company will also initiate new programs to help address the social and economic challenges of the transition.

The announcement was made in the lead up to the UN Food Systems Summit in New York, as part of Nestlé's contribution to help achieve the Sustainable Development Goals (SDGs) by 2030. It also follows the recent report from the United Nations' Intergovernmental Panel on Climate Change that shows the climate crisis is intensifying. Nestlé is investing CHF 1.2 billion over the next five years to spark regenerative agriculture across the company's supply chain. 🟩

Cargill Conducts Study Revealing Consumer Interest in Immune Support

Cargill has completed a recent survey of 3,008 consumers across three continents that uncovered that interest in immune health support increased since the pandemic began and is predicted to continue longer-term. Among participants in Cargill's recent global Feed4Thought survey, 84% of Chinese, 64% of American and 58% of British consumers noted that immune support has become more important to them since the start of the pandemic.

The survey showed that most will take proactive measures to support their gut and immune health, including taking immune support supplements. 43% of U.S. consumers surveyed said they will take an immune health supplement in the next six months (an 8% increase since the start of the pandemic), while 46% of respondents in China (6% increase) and 33% of U.K. consumers (4% increase) reported they will increase their immune supplement use in coming months.

"Consumers are recognizing the benefits of taking action for their immune and gut health to support overall health and well-being," said Chuck Warta, president of Cargill Health Technologies. 🟩

Diamond of California® Debuts Nut Coatings, Winning Best New Low Carb Trick from Food Network Magazine



Diamond of California® has announced their latest innovation, Nut Coatings, which was awarded the Best New Low Carb Trick from the Food Network Magazine. Nut Coatings are a keto-friendly and low-carb breading alternative crafted with a nut base of walnuts and pecans simply seasoned with herbs, spices, and other real ingredients. Nut Coatings are available in three flavors including Original, Italian, and Ranch and serve as a true alternative for standard breading in recipes like meatballs, chicken, macaroni and cheese, eggplant parmesan, and more.

In order to create a nut-based breading alternative that can crust, top, and coat, Diamond of California® partnered with its product development team and specialty spice experts to create the perfect texture and flavors that complement meats, vegetables, pastas, and plant-based proteins. Nut Coatings were also tested thoroughly to ensure they could stand up to everyday cooking techniques. Plus, due to the natural oils present in nuts, Nut Coatings adhere without binders like eggs or flour and even perform best when baked or air fried without the addition of extra fats, allowing for less fat overall and delivering an appealing texture.

Craig Tokusato, CMO of Diamond of California®, said, "With the rise of keto and plant-based diets, we saw a need for a cleaner breading alternative using what we know best, nuts." 🌱

Wonderful Pistachios Expands Esports Marketing with Content Partnership

Wonderful® Pistachios is furthering its investment in esports through a content partnership with streamer Brennon "GoldGlove" O'Neill. As part of this marketing campaign across Twitch and YouTube gaming channels, Wonderful Pistachios is targeting adventurous snackers who are in pursuit of flavor to bring awareness to its newest No Shells BBQ and No Shells Sea Salt & Vinegar varieties.

According to a report by MRI Simmons, 47 million U.S. adults are esports fans and more than 80% of esports fans reported that they eat or drink while watching (Newzoo). "Our esports expansion only furthers our mission to share our favorite plant protein snack nut with new audiences, and on newer platforms that have tremendous growth potential," said Adam Cooper, senior vice president, Wonderful Pistachios. Wonderful Pistachios No Shells flavor varieties are available in convenient .75 oz single-serve packs that are perfect portion control for gamers between meals, as well as larger 5.5 oz, 11 oz, or 22 oz options for sharing. 🌱

Flagstone Foods to Source 100% of its Almonds from Bee-Friendly Farms by 2025

As a part of its Healthy Bees, Happy Snackers initiative, Flagstone Foods, a private label manufacturer of snack nuts, trail mixes, and other nut-based snacks, has announced its commitment to promote a more sustainable almond industry by sourcing 100 percent of its almonds from bee-friendly farms by 2025. Flagstone Foods CEO Robert Scalia commented, "We aim to work collaboratively with almond growers, processors and bee-friendly organizations through our Healthy Bees, Happy Snackers initiative, all focused on supporting the needs of the honey bee, which ultimately aids the almond industry as a whole."

In addition to its sourcing pledge, Flagstone Foods' Healthy Bees, Happy Snackers program includes verification and certification of bee-friendly farming practices, a commitment to sustainable farming practices more broadly, and charitable contributions to Project Apis m., an organization that funds honey bee research and the expansion of pollinator habitat and forage. 🌱



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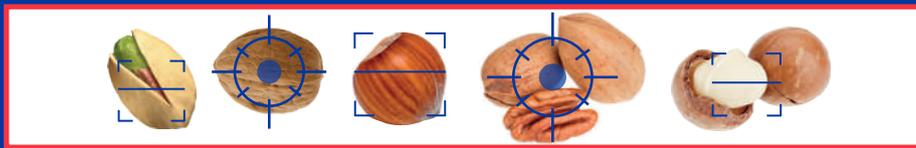


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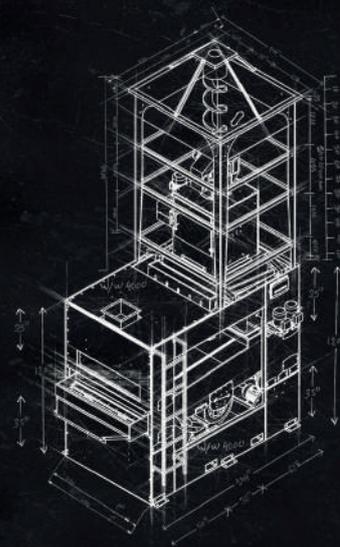
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TIM RAUE

CO-FOUNDER AND CHEF,
RESTAURANT TIM RAUE
IN BERLIN, GERMANY

Tim Raue is one of Germany's most renowned chefs and, together with his business partner Marie-Anne Wild, is founder of the two Michelin-Starred Berlin restaurant that shares his name. Restaurant Tim Raue has also made the list of Top 50 Restaurants in the world for various years now. He uses Asian elements to inspire his cooking and provide diners with a truly unique menu. Apart from running Restaurant Tim Raue, Chef Raue has made numerous appearances on TV, being featured on the Netflix series, Chef's Table, VOX program Kitchen Impossible, and Germany's version of MasterChef, among others.

You are a renowned chef, not only in Germany, but in the world. Did you ever think that this would be result of your journey in the culinary world? When did you know that this was the path you wanted to take?

That happened by accident, as I was invited as a guest chef to international fairs, I was invited by others whom I met there and so I began a journey that allowed me to present myself and my culinary vision around the globe. And to be listed at The Worlds 50 Best and having a Netflix "chef's table" episode are two things that allow us to reach customers from the entire world.

Your cooking style is inspired by many Asian elements. What led you to become interested in this fusion and what are you trying to convey with your food? How would you describe your culinary style?

When I was working for Swissotel & Raffles at the beginning of 2000, I traveled to Singapore, Hong Kong, Tokyo & Bangkok and got to know cuisines that touched me in a way, French cuisine never did. So, I forced myself to invent a unique style, that nowadays seems to be a unique selling point for me.

Restaurant Tim Raue has been awarded two Michelin Stars and is considered one of the top restaurants in the world. What do these accomplishments and acknowledgements mean to you?

First of all, that we are fully booked! Together with my business partner Marie-Anne Wild, we are focused on making money to pay our team –and as funny as this might sound, this is not very common in a German Michelin starred restaurant. Most of them are not successful businesses but rather a location that is sponsored by someone who sees it as his/her task to support this culture. Secondly, all awards are attracting people to come to our restaurant, which is great. And thirdly, I am extremely proud that we do so great every day.

Your menu is constantly putting an emphasis on health. What inspired you to take this approach to creating your menu? What do you believe is the future for healthier eating?

I was learning about medicinal cooking in Hong Kong and spent time at the "Chinese pharmacy" to understand more about this thousand-year-old tradition and how to heal people with food. That made me change the menu and avoid ingredients which people do not really need.

Speaking of health, nuts and dried fruits are lauded for being an excellent addition to healthy diets. How do you use nuts and dried fruits in your menu?

We use almonds, hazelnuts, pecans and cashews all the time, as well as their oils. Dried fruits like apricots, raisins and dates, we use to sweeten dishes instead of using sugar.

Apart from health, nuts and dried fruits also add great taste and texture to many dishes. For you, what can nuts and dried fruits add to a recipe?

Nuts are crunchy and oxidative, as we always combine truffle with hazelnuts.

You are not just the owner and chef at Restaurant Tim Raue. You embrace the entrepreneur spirit, getting involved in many aspects of the culinary world. What can we expect to see from Tim Raue in the future? Do you have any exciting projects that you're working on?

I never make plans, so it comes naturally, and I have no clue where and when. 🍴

QUICK-FIRE ROUND!

What do you enjoy the most about being a chef?

It's my passion.

What is your personal favorite dish with nuts or dried fruits?

Topinambur with hazelnut, winter truffle & raisins and nutty butter.

What is the next big gastronomical trend in the world?

I don't care, I hate trends, I love traditions.

What nuts and dried fruits do you always have in your kitchen at home?

Nothing, I love to go out to restaurants.

Quince, Macadamia & Passion Fruit

Macadamia Mousse:

- 100 g Macadamia nougat
- 150 g Heavy cream

Put the nougat into a bowl. Bring the cream to a boil and stir into the nougat. Emulsify, and then chill for 2 days. Transfer the mixture into a blender and beat to a mousse.

Quince and Passion Fruit Chutney:

- 300 g Quinces, peeled and grated
- Flesh and seeds of 3 passion fruits
- 50 g Quince concentrate
- 50 g Quince puree
- 25 g Muscovado sugar
- 2 g Ground star anise
- 0,1 g Saffron powder
- 2 Traces of ground turmeric

Put all the ingredients into a saucepan and bring to a boil. Let the mixture cool, then vacuumize it. Cook the chutney in a CombiMaster for 20 minutes at 82 degrees Celsius.

Macadamia Crunch:

- 200 g Macadamia nuts
- 125 g Sugar
- 125 ml Water

Put the nuts and the sugar into a sauté pan with the water and bring to a boil. Continue boiling, stirring constantly, until a caramel forms and sticks to the nuts. Transfer the mixture to a baking mat and let cool. Roughly crush with a mortar and pestle.

Quince Gel:

- 50 g Quince concentrate
- 50 g Quince puree
- 150 g Quince juice
- 10 g Agar powder
- 2 Traces of ground turmeric

Put all the ingredients into a sauté pan, bring to a boil, then simmer for 5 minutes. Transfer to a food processor and let cool, then process the mixture to a smooth gel. Transfer to a spray bottle.

Caramel Tubes:

- 250 g Isomalt powder
- 140 g Glucose powder
- 125 ml Water
- 40 g Salted butter

Put the Isomalt and the glucose powders into a saucepan with the water and cook to a dark caramel. Stir in the butter. Pour onto a baking mat and let cool. In a food processor, process the mixture to dust. Sift the caramel dust onto a baking mat as 4x8 cm rectangles. Place the mat onto a baking sheet and melt the caramel dust under a salamander. Roll the paper-thin caramel sheets around a metal pipe to make a tub. Store in a cool, dry place.

Quince Sorbet:

- 275 g Quince concentrate
- 135 g Passion fruit puree
- 150 g Water
- 37,5 g Glucose powder
- 50 g Honey
- 1,3 g Guar gum
- 1,3 g Locust bean gum

Put all the ingredients into a blender and blend for 10 minutes at a medium speed. Transfer the mixture to a Pacojet beaker and chill overnight, then freeze. Pacotize in the Pacojet 1 hour before serving, then freeze again.

Garnish:

For each person:

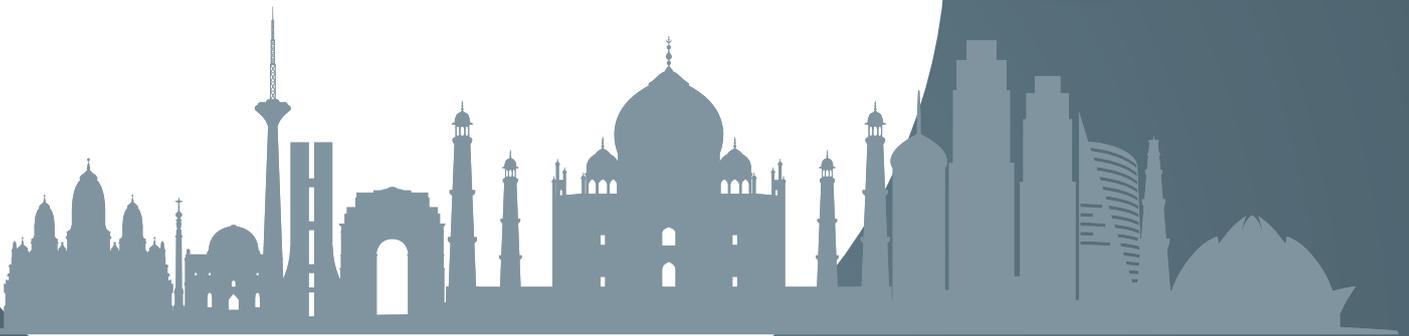
- 1 Steam Paztizz tops
- 5 Saffron threads
- A pinch of freshly ground wild Madagascar pepper





Country/Product Spotlight

India & Cashews



Industry Highlight

An overview of production, trade and consumption

Improved Cashew Varieties and Recommended Package of Practices

Dr. Venkatesh Hubballi shares insights into the Indian cashew industry

Health Benefits of Cashews

Understanding the nutritional qualities of cashews

New Product Launches

Insights into new products that utilize cashews

This Country Product Spotlight is the sixth in a series of industry and market overviews in the *Nutfruit* magazine. This report provides a snapshot of the cashew industry in India, with data, analysis, and trends.

We would like to thank INC Executive Committee Member, Pratap Nair; Global Cashew Council Chair, Hari Nair; INC Ambassador, Pankaj Sampat; and DCCD Director, Dr. Venkatesh Hubballi for their collaboration in this edition.

Industry Highlight

Indian Cashew Industry in Numbers

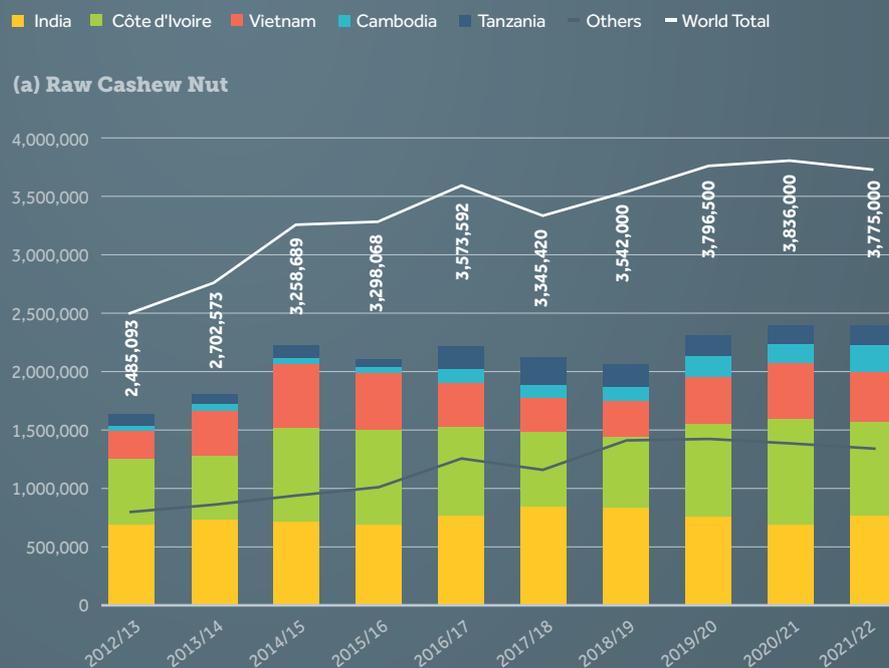
<p>70,300 MT annual exports (5-year average, shelled cashews)</p>	<p>761,100 MT annual production (RCN, 5-year average)</p>	<p>23 % of the world production (5-year average)</p>
<p>1 million growers (mainly small farmers)</p>	<p>+1.6 million MT (of processing capacity)</p>	<p>500,000 workers (95% women)</p>
<p>1,800 medium-large and +2,100 on-farm processing units</p>		

Production

In the sixteenth century, the cashew tree (*Anacardium occidentale* L.), native of the Brazilian Amazonia, was introduced in India (Goa) by the Portuguese as a mean to prevent coastal soil erosion, since it is fast-growing, thrives well in sandy soils and presents a vast root system and tolerance to salinity. With the aid of elephants, which ate the whole cashew fruit, the nut was spread throughout the area. However, plantations were not established until the nineteenth century, when cashew cultivation began to spread to other tropical regions in Africa, Asia, and Latin America. International trade started in India at the dawn of the twentieth century¹⁻⁴.

Over the 2012/13-2021/22 period, India was the world's largest producer of raw cashew nuts (RCN), averaging 742,800 metric tons of RCN (178,300 MT kernel equivalent) and it is one of the top processors –along with Vietnam. Throughout the last decade, the Indian crop was fairly stable, ranging between a minimum of 160,500 MT (kernel equivalent) in 2012/13 and a maximum of 196,000 MT in 2017/18. With an estimated 2021/2022 production of over 177,100 MT, India currently accounts for 21% of the global cashew production (Figure 1)⁵.

Figure 1. World Cashew Production. Metric Tons. Source: INC



1. Malhotra S.K., Hubballi Venkatesh N. and Nayak M.G. (2017). Cashew: Production, Processing and Utilization of By-products Directorate of Cashewnut and Cocoa Development, Cochin, Kerala, India. 2. Bhoomika, H.R. and Sudha Rani, N. (2018). Problems India - An Overview, Int.J.Curr.Microbiol.App.Sci. 7 (10). doi: <https://doi.org/10.20546/ijcmas.2018.710.426>. 3. Mahantesh, N. and Manjunatha, P. (2018). Trends in Area, Production, Yield and Export-Import of Cashew in India-An Economic Analysis. Int.J.Curr.Microbiol.App.Sci. 7(12). doi: <https://doi.org/10.20546/ijcmas.2018.712.4>. 4. Commodities at a Glance: Special issue on cashew nuts - (N°14 - April 2021) (UNCTAD/DITC/COM/2020/1). 5. INC Database.



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