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

Edition 88. N° 1 March 2023

INC XL WORLD NUT AND DRIED FRUIT CONGRESS May 22-24, 2023 London, UK

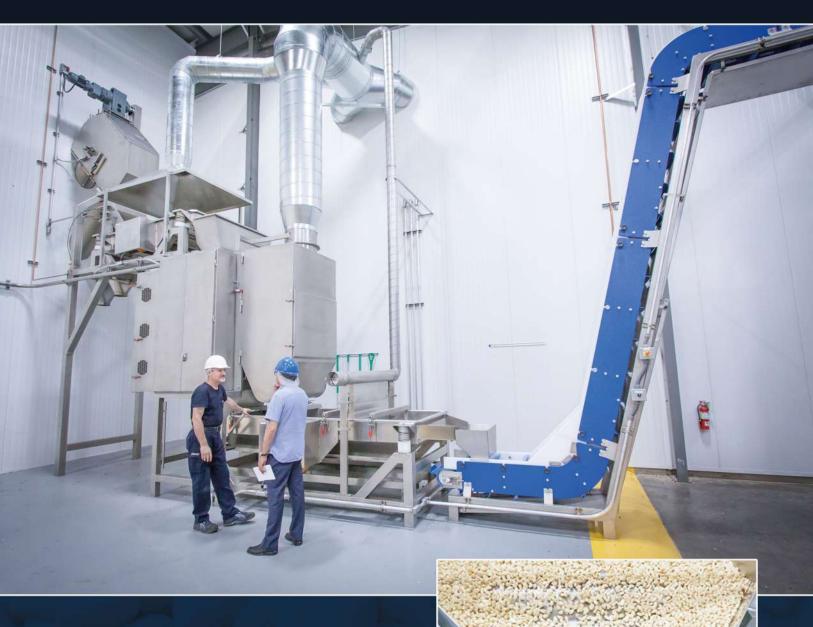
London Calling! Industry Leaders Look Forward to Annual Congress

p. 5



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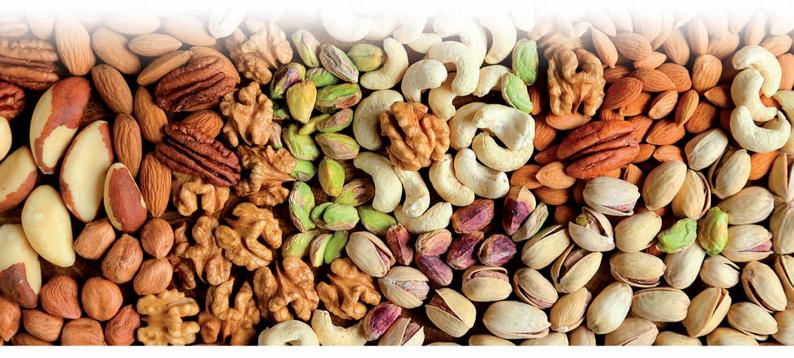
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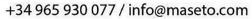


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The INC is the international umbrella organization for the nut and dried fruit industry and the source for information on health, nutrition, statistics, food safety, and international standards and regulations regarding nuts and dried fruits.

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For all editorial and advertising enquiries:

Goretti Guasch

Marc Centelles marc.centelles@nutfruit.org

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Carrer de la Fruita Seca, 4 Polígon Tecnoparc, 43204 Reus, Spain Tel: +34 977 331 416 Email: inc@nutfruit.org inc.nutfruit.org

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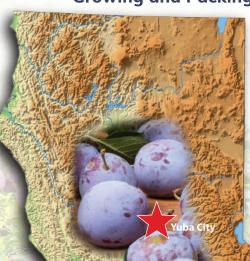
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Nut and Dried Fruit Industry Gears Up for INC Congress in London

MICHAEL WARING

INC CHAIRMAN



The focus continues firmly on demand creation. Current economic conditions, with rising production costs and weaker pricing, represent a major challenge for most of our products. For more insights into crop expectations and demand, I invite you to consult this edition's statistical review.

At the time of writing, the Executive Committee has just finished its meeting in Vancouver, Canada, site of the 2024 INC Congress. At this meeting, we conducted a financial review for the end of 2022 and finalised the foundation's budget for 2023. We also reviewed all of the INC's ongoing projects and took stock of their progress. In Vancouver, the Executive Committee approved reforestation as the focus topic to launch the INC Sustainability Project. The Committee also decided to prioritise key areas of focus for health and nutrition research to obtain regulatory approved health claims and agreed to conduct a consumer insights study in 2023.

Last month, the INC returned to Dubai —this time for Gulfood, the world's largest annual food and beverage trade exhibition. Each year, Gulfood welcomes around 95,000 visitors from more than 120 countries. As ever, the INC Pavilion was buzzing with activity, providing an unparalleled venue for INC exhibitors to network and make contact with business partners.

I would also like to highlight the excellent results of our ongoing multi-country dissemination campaign targeting Generation Z, which is poised to become a key driver in the consumer market and represents the largest consumer base through to 2030. The campaign targeted Chinese Gen Z across key social media channels with messages aimed at



increasing consumption through consumption moments, health benefits and breaking down barriers against eating nuts and dried fruits. The campaign has reached 46 million members of China's Gen Z and featured the participation of 44 influencers. The multi-country dissemination plan will continue in China through 2023 and will also take on new horizons by launching in India, a key market for growth within the nut and dried fruit industry.

Looking ahead, the nuts and dried fruits industry is gearing up for the 2023 INC Congress, which will be held at the historic JW Marriott Grosvenor House Hotel in London on May 22-24, 2023. Over 930 registrations have been confirmed so far, representing more than 60 countries. The organising committee —Giles Hacking, Congress Chairman, Mark Mariani, INC Executive Committee Member, Goretti Guasch, INC Executive Director, and myself—is working tirelessly to ensure a top-notch event. The Congress will feature insightful roundtables on each nut and dried fruit, expert-led seminars on nutrition and sustainability, and an exclusive program of social events.

I want to express my deepest condolences to our INC family, friends and colleagues in the parts of Türkiye and Syria that were hit by the devastating earthquake in early February. We will continue to look for opportunities to support our affected colleagues in the wake of this catastrophic event.

Kind regards,

Michael G. G. Waring

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INC Sets New Strategic Goals for 2022-2026



GORETTI GUASCH INC EXECUTIVE DIRECTOR

The future of the nut and dried fruit industry was front of mind as the INC Executive Committee gathered at our headquarters in Reus, Spain, for a Strategic Planning Meeting in late October 2022. By the time the meeting was adjourned, we had identified new priorities for the INC and charted a roadmap for the years ahead.

The Committee agreed that it was essential to incorporate the figure of the consumer into the INC's vision, mission and value proposition. The revised statements adopted by the Committee reflect our commitment to encouraging greater consumption in all markets across the globe:

- Vision: To grow consumption by being the leading international source of information on nuts and dried fruit for health, nutrition, statistics, food safety and quality standards while improving market access globally.
- Mission: To facilitate sustainable growth in supply and consumption through sharing the goodness and health benefits of nuts and dried fruit globally.
- Value proposition: INC promotes the sustainable growth of nuts and dried fruit globally to improve consumption and benefit the businesses involved.

The Committee also adopted four new strategic goals for the period 2022-2026:

• Goal #1: Increase global consumption to ensure a healthy balance between supply and demand. The consumer is key to the growth of our sector. Therefore, the INC will continue to empower the industry to work together and raise awareness about the importance of the health benefits of nuts and dried fruits. To help the INC achieve this goal a new committee on Global Communications and Insights is being created to ensure the correct message is reaching the consumer.

- · Goal #2: Prioritize key areas of focus for health and nutrition to obtain regulatory approved health claims to aid the promotion of nuts and dried fruits globally. The INC will focus its efforts on gaining a regulatory approved health claim in either Europe, USA, Australia or Canada as the claim in these areas would have global impact, recognition and prestige worldwide. As well as this the INC's multi-country marketing campaigns will aim to make an impact in key regions for consumption growth and penetrate them with marketing strategies by promoting the health benefits of nuts and dried fruits.
- Goal #3: Collaborate with international organizations regarding increasing market access and overcome the challenges of the trade barriers and supply chain **issues.** The INC will continue to support initiatives to help overcome trade barrier challenges and supply chain issues to help global trade worldwide by being present in discussions where trade barrier challenges, tariffs, and regulatory and supply chain issues are topics on the agenda.
- Goal #4: Define the sustainability agenda for the nut and dried fruit industry. The INC will launch a global project to promote both the industry's sustainability efforts and the positive facts that are inherent in nuts and dried fruits, with the goal of ensuring that the promotion and concept of sustainability are aligned across the entire sector.

The new strategic goals represent a plan for growth and improvement. How our industry grows and evolves matters. We are grateful to all our members, stakeholders and the industry as a whole for your continued support and commitment to both the INC and the nut and dried fruit sector.

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Cargill Publishes Study Showing Consumers Crave Healthier Indulgence in Bakery Aisle



New research from Cargill has found that consumers want the best of both worlds —indulgence and health and they're willing to pay more for baked goods that deliver on both attributes. The food giant surveyed 1,200 US consumers to understand the unmet needs and motivations that drive consumer purchase behaviors related to cakes, pastries and cookies. The proprietary study, titled Sweet Delight - Decoding Consumer Bakery Decisions, not only looked at what consumers say they do but revealed the why behind their purchase decisions, including their expectations around textures, packaging claims and ingredients.

Among its findings, the Cargill research confirmed indulgence remains the most important purchase trigger for cake, pastry and cookie purchases, outweighing barriers such as weight gain, health or diet considerations. More than half (54%) of those surveyed said they chose bakery products to satisfy cravings, while 44% admitted they purchased them as a reward. Other aspects of the study explored the influence of ingredient lists, nutritional information and package claims on consumers' bakery purchases. Highlighting the continuing importance of label-friendly formulation, the research found consumers viewed ingredients as most influential to their purchase decision (42%), over nutrition scores (39%) and specific product claims (28%).

The research revealed that health-related attributes registered as some of consumers' biggest unmet needs, spanning desires for products that delivered portion control, balanced great taste and health, supplied energy boosts without sugar crashes and offered greater satiety, especially in the cookie and pastry space. The study also identified the most promising innovation platforms to meet those unfilled desires. By looking at both purchase drivers and consumers' willingness to pay more, Cargill found three top benefit/innovation platforms emerged: Fresh from the Oven, Premium Indulgence and Better for You.

Blue Diamond Growers Announces Latest Sustainability **Achievements**

Blue Diamond Growers has announced key sustainability accomplishments from the past year in their first-ever sustainability report entitled Growing a Better Tomorrow, available on the Blue Diamond Growers website at www. bluediamond.com/sustainability.

According to Dr. Dan Sonke, Director of Sustainability at Blue Diamond Growers, the cooperative's sustainability efforts focus on six key pillars, including sustainable agriculture, water stewardship, biodiversity and pollinators, climate and energy, people, and resilient communities. Key achievements in 2022 include:

- \$45 million in funds awarded to Blue Diamond Growers by the U.S. Department of Agriculture (USDA) as part of a climate protection partnership activation that will be used to help growers expand existing implementation of cover crops, conservation plantings and hedgerows, and whole orchard recycling.
- More than \$1.74 million paid directly to growers through the Blue Diamond Growers Orchard Stewardship Incentive Program (OSIP). The OSIP now covers 40% of all Blue Diamond member acres representing more almond acres in a sustainability program than any other company in the world.
- 95% of Blue Diamond member orchards in the stewardship program report using efficient micro-irrigation systems —nearly two times the rate found in other California crops.

- 29% of Blue Diamond orchards reported planting cover crops for soil quality and pollinator benefits.
- 18% reduction of materials going to landfill at the Salida facility through increased recycling.
- · A new project to reduce greenhouse gas emissions through the replacement and modernization of a steam boiler system at the Sacramento plant. The project is expected to reduce natural gas consumption by more than 30% and water use by 20%.
- \$140,000 in community grants committed to 14 organizations, along with \$25,000 donated in matching funds to contribute to 807 Future Farmers of America (FFA) jackets for high school students.
- 190,000 lbs of almonds and almond products -valued at more than \$700,000— provided in product and in-kind donations to food banks and other nonprofit organizations.

Kellogg's Introduces New Flavor of Special K Featuring Almonds

Kellogg's has announced the launch of a new breakfast cereal featuring almonds: Kellogg's Special K High Protein. This new version of the iconic breakfast cereal comes in a decadent chocolate almond flavor and boasts the brand's highest protein offering ever. Packed with 20 g of protein per serving, real almonds and chocolatey goodness, Kellogg's created this flavor with both plant-based protein fans and chocolate lovers in mind. The launch of this variant coincided with the addition of two other members to the Special K family: Kellogg's Special K Oat Crunch Honey and Kellogg's Special K Zero. Sadie Garcia, Brand Director at Kellogg Company, commented: "With tasty new benefits like topnotch crunchy texture, our first-ever zero grams sugar cereal and our highest protein offering yet, you're sure to find something to satisfy your every need -and then some!"

Frito-Lay Survey Identifies Crunch as Top Component of Perfect Snack

The latest Frito-Lay U.S. Trend Index has identified the "crunch" factor as the most important component of the perfect snack. The index polled consumers on their snacking preferences and found that more than 70% of snackers would reach for a food with a crunch when considering their perfect snack. Beyond crunch, the survey found that other important snack factors included sweet (66%), salty (61%) and filling (53%). Almost half of those surveyed expressed that, when thinking of a perfect snack, that snack is also nostalgic and reminds them of a specific moment in time (49%). This poll was conducted by Morning Consult between November 4-November 7, 2022 among a national sample of 2,212 adults. "Consumers are at the heart of all we do, so considering every component of a snack -including the crunch factor- is very important to us," commented Denise Lefebvre, senior vice president of R&D for Frito-Lay and Quaker Foods North America.

Nutella Debuts Two Global Fan Favorites in the United States



Nutella has announced the debut of two new products in the US market: Nutella B-Ready and Nutella Biscuits. Already beloved by thousands across the world, these delicious offerings are the first innovations to come to the United States since Nutella &GO!, which debuted in 2012. Nutella B-Ready is a breaktime snack designed to be enjoyed anywhere and anytime. It is a light, crispy wafer shell filled with creamy Nutella and sprinkled with puffed wheat crisps. Nutella Biscuits consist of a golden baked crunchy biscuit, specially crafted to hold a creamy heart filled with the unique taste of Nutella. "We are thrilled to be launching Nutella B-Ready and Nutella Biscuits in the US, two products that have already received love and accolades across the globe," commented Noah Szporn, Senior Vice President of Spreads at Ferrero North America.





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Being a cook is something that runs in your family. What is your first memory of helping out in the kitchen, and when did you know that you want to become a chef full time?

I have been cooking since the moment my mother, mamma Rita, gave me my first handful of flour. I was five years old. She was the head chef of Le Calandre at the time and I would come to visit her every day after school. I would help as best I could, rolling out cookie dough or stirring a pot of risotto. I have such a vivid memory of being in the kitchen at that age. I was as tall as the bottom of the chefs' jackets and my dream in life was to one day have a clean, white, perfectlypressed jacket of my own. My memories of that time deeply influence my cooking still today.

Italian food is a cuisine that is adored all over the globe. However, sometimes it gets changed in other countries. For you, what is the essence of traditional Italian food? What makes it an amazing cuisine?

Italian food varies greatly even in Italy, but I would say that the common denominator is sun and a smile. The diversity makes it truly remarkable,

as well as the warmth and comfort it provides.

At 28 years old, you were awarded your third Michelin star, becoming the youngest chef ever to achieve this. What does this achievement mean to you and what future goals are you setting for yourself?

Our goal as chefs is to make our guests happy and provide them with a fun, fulfilling experience. My challenge each day is to make sure our guests leave with a smile. Our goal is to be able to do this every day in all of our restaurants —from Padua to Venice, from Paris to Marrakech.

Consumers nowadays consistently want healthier and more sustainable food options. How is your restaurant Le Calandre catering to these desires from customers?

Our cuisine is based on the pillars of lightness and depth of flavor. The selection of quality ingredients is key, especially with regards to one's health. We have deep respect for the ingredients that enter our kitchen and are meticulous about how they

are grown or produced. Our focus on ingredients is what makes for healthy, happy customers.

Apart from the wellrecognized uses of nuts and dried fruits in Italian food, such as pesto, what other uses are there?

Nuts are commonly used in Italy to make both sweet and savory preparations, including gelato and sweet spreadable creams made with almonds, hazelnuts or pistachios. In Venice, for example, pine nuts and raisins are used in a traditional dish called sarde in saor, or sardines that are first fried and then pickled in vinegar and onion

How can nuts and dried fruits make a dish better? What do you value about them?

This all depends on the quality of the nuts, of course. We use a variety of nuts to make dairy-free milks that give a creamy sensation to our dishes without the lactose.

You are not only a chef, but also a philanthropist with a non-profit for childhood diseases, an author and a restaurateur. What plans do

you have for the upcoming years? Any projects you would like to share with us?

My brother Raffaele and I founded a non-profit organization called II Gusto per Ia Ricerca over 10 years ago. One hundred percent of the funds raised are donated to research on childhood diseases and assisting the kids that are suffering from them. Every year, we bring together chefs from across Italy and Europe to prepare a special lunch and auction to support charities with a similar mission.

QUICK-FIRE ROUND!

What do you enjoy the most about being a chef?

The chance to understand and get to know the world through ingredients. And having the opportunity to meet new people every day.

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

Bread, olive oil, marzipan (sweet almond paste) and bottarga.

What is the next big gastronomical trend in the world?

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

Sicilian almonds,
Piedmontese hazelnuts and

Egg Floating in Hazelnut Broth

Ingredients for 4, composition for 1

Floating egg:

- 160 g egg whites
- 2 g salt
- 2 g dill, chopped
- 20 g cream of asparagus
- 4 egg yolks
- 20 g delicate extra-virgin olive oil

Whisk egg whites with salt and dill, then divide between 4 steel ring molds (6 cm/2½ in wide and 2 cm/1 in tall) on a baking sheet lined with parchment paper. Form a hollow in the center of each whipped egg and fill with cream of asparagus. Cover with the remaining egg white, leveling the surface with a spatula. Place the baking sheet under a broiler and cook until lightly browned for 3 minutes. With the back of a spoon, form a hollow in the top of the egg white and lay inside the raw egg yolk inside. Return to the broiler for a moment, then drizzle with a little olive oil and a pinch of salt.

Hazelnut broth:

- 150 g beef (forequarter muscle), cut into pieces
- 20 g delicate extra-virgin olive oil
- 40 g white onion, chopped
- 30 g green celery, chopped
- 30 g carrots, chopped¼ bay leaf
- 1/ play leaf
- ½ clove
- 1 small piece star anise
- 30 g white wine
- 10 g red wine15 g semi-dry Marsala
- 250 g ice
- ½ L hen broth, very cold
- salt, to taste10 g hazelnuts, toasted until brown in a
- 140°C/285°F oven

Separately brown meat and chopped vegetables in oil. Combine meat and vegetables in a Dutch oven with bay leaf and spices. Add wines, let evaporate, cover with ice, and add cold hen broth. Add salt and cook gently for about 1 hour, making sure to skim off the fat. Add roasted hazelnuts and cool to 4°C/40°F. Vacuum-seal and refrigerate for 8 hours (for further flavor extraction). Strain.

Parmigiano drops:

- 150 g Parmigiano Reggiano aged
 24 months, diced
- 250 g still mineral water
- 10 g delicate extra-virgin olive oil

Place the Parmigiano in a Pacojet® container with water and oil. Freeze at -20°C/-68°F, then pacotize until creamy. Shape into small quenelles using a spoon.

Cream of asparagus:

- 3 a salt
- 1 g granulated sugar
- 200 g still mineral water
- 150 g white asparagus, trimmed
- 4 g delicate extra-virgin olive oil

Dissolve salt and sugar in water. Vacuum-seal asparagus with brine and cook in a steam oven at 102°C/215°F for 20 minutes. Drain asparagus well. Purée 90 g asparagus with oil until creamy. Cut remaining asparagus into pieces for finishing the dish.

To finish:

- 500 g hazelnut broth
- 60 g white asparagus, cooked in brine

Composition:

Pour boiling broth into a hot bowl, place floating egg in the center, garnish with 6 pieces of asparagus and 2 Parmigiano drops.

Note:

To concentrate the protein and have stiffer egg whites, pour whites into a fine mesh chinois to separate the watery part from the rest.





This Country/Product Spotlight is the tenth in a series of industry and market overviews in Nutfruit magazine. This report provides a snapshot of the prune industry in Chile, with data, analysis and trends.

We would like to thank Chileprunes for their collaboration on this edition.

Industry Highlight

An overview of production and trade

A New Sustainability Standard for the Prunes Industry

a new sustainability standard for the prunes

Health Benefits of Prunes

Learn about the nutritional qualities of prunes

Prunes on the Market

Discover the versatility of this dried fruit



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The INC will continue updating the statistics in next issues of the Nutfruit magazine and new sletters.