CONTENTS

05  WHO WE ARE
13  WHAT WE DO
22  FUNDED PROJECTS
26  MARKETING & COMMUNICATION
32  SCIENTIFIC & TECHNICAL PROJECTS
Dear Friends,

Looking back over 2023, I am struck by how progressive and resilient our industry has proved itself to be. We have faced many challenges over the past few years, from the international shipping crisis to inflation and high energy costs. And, in 2023, the challenges of rising costs and economic uncertainty have been compounded by attacks on commercial vessels in the Red Sea as the year drew to a close.

Despite these hurdles, our industry is ready to embrace the opportunities that lie ahead. With our excellent product availability, we are well positioned to promote consumption worldwide in order to achieve sustainable growth as an industry. The INC is proud to be setting the global industry agenda for nut and dried fruit promotion.

With the INC squarely focused on demand creation and sustainability, these key themes were at the top of the agenda at the 2023 INC Congress in London. At this powerhouse gathering of industry leaders, nearly 1,300 attendees from 65 countries gathered at the JW Marriott Grosvenor House in Mayfair, London, for several days of dynamic networking and lively discussions about the direction of the sector. We discussed ways to innovate and drive sales of our healthy products in consuming markets globally, focusing especially on the Generation Z segment in high-growth-potential countries. I was heartened to see that the entire nut and dried fruit world is on the same page about the importance of demand creation and sustainable growth. With the positivity and proactive diligence on display in London, it was clear to me that our industry is ready to tackle whatever challenges lie ahead.

I hope you enjoy reading about the INC’s achievements over the past year, which would not have been possible without the continued support of our members. I am deeply grateful to them, and to all who helped make 2023 a successful year. In particular, I would like to thank the Board of Trustees and Executive Committee for their time and dedication to our causes. A special thank you, as well, to INC Executive Director Goretti Guasch and her team for their continued great work and execution of our industry strategic plans.

Looking ahead, I wish all readers a safe and healthy 2024. Let us hope that peace and compassion endure through the difficult times the world is currently facing. Take care, thank you for your support, and I look forward to seeing you all again soon—at the 2024 INC Congress in Vancouver!

Sincerely,

Michael Waring
INC Chairman
The year 2023 started off with a clear focus: laying the groundwork that would set us on the road towards accomplishing our strategic goals that were identified in late 2022. As the year progressed, our strategic plan was brought to life and is now defined by a clear set of initiatives that will put us on the winning track to accomplishing what is now our overarching goal of the strategic plan—which is to increase global consumption to ensure a healthy balance between supply and demand.

**COUNTRY OUTREACH: GLOBAL PROGRAM FOR A BETTER WORLD**

Evolving from our goal to collaborate with international organizations regarding increasing market access and overcoming the challenges of trade barriers and supply chain issues, in 2023 an INC delegation made on-the-ground outreach visits to meet with high-ranking government officials and representatives of key companies in markets with high-growth potential, India and China. The success of these efforts prompted us to level up by embarking on an ambitious new initiative, known as “Country Outreach: Global Program for a Better World,” that envisages a concrete set of actions: fostering collaboration with governmental bodies and international organizations, and building relationships with major manufacturers and retailers in key countries for growth. Our objective, at each stop along the way, will be to promote the countless health benefits of nuts and dried fruits and encourage higher daily intake of these products. Each ministry or organization that we visit will be invited to sign the INC World Declaration on the health and nutrition to obtain regulatory approved health claims to aid the promotion of nuts and dried fruits globally. This year we achieved a major milestone by approving funding for NUTPOOL, a first-of-its-kind scientific study. The concept for this groundbreaking study emerged from the historic NUTS 2022 gathering of international researchers at the INC headquarters in late 2022. The objective is to fill current gaps of knowledge about the associations between eating nuts and the risk of diseases as well as mortality. With over 1 million participants, this three-year, multi-country meta-analysis will be the first to use a standardized approach to obtain findings that are representative of the worldwide population. The study will provide extensive data which will be key for the industry to support future health claims, which in turn will boost consumption.

**MULTI-COUNTRY DISSEMINATION PLAN**

This year our message of healthy goodness reached more consumers globally than ever before, thanks to the impact of our Multi-Country Dissemination Plan. Launching in China in 2022 and expanding into India in 2023, our successful campaigns have touched the lives of over 200 million young people across China and India. As well as the continuation of the initiative in these regions in 2024, we will soon be targeting Generation Z in Latin America as well, specifically Brazil, Mexico, Argentina and Chile. These promotional efforts will be coordinated with our Country Outreach actions, as mentioned above, for maximum impact. In 2024, we plan to invest a total of €1.5 million in activities promoting nut and dried fruit consumption across all targeted countries.

**INC SUSTAINABILITY PROJECT - REFORESTATION**

Beyond human health, we must also concern ourselves with the health of the planet if our industry is to achieve sustainable growth. This year, the INC’s strategic goal of defining the sustainability agenda for the nut and dried fruit industry began to take shape with the approval of the INC Sustainability Project. The focus of the project will be reforestation, an area with vast potential for synergies with the nut and dried fruit industry. The INC’s role in this project will involve providing a forum for international collaboration, advising and supporting work on the sustainable development of forest product markets, raising awareness on the role that forest nuts can play in greening economies and in providing sustainable products and livelihoods, and delivering statistics on the trade, production and consumption of forest nuts. Throughout 2023, we have laid the groundwork for this exciting initiative to bear fruits in 2024.

As you can see, we have covered a lot of ground over the past year. Each of these initiatives is making valuable progress in a distinct sphere of activity. At the same time, they also complement one another, feeding into our industry’s primary goal: increasing global consumption to ensure a healthy balance between supply and demand. As ever, I am grateful to our INC members for their ongoing support, which helps bring us closer to achieving this goal.
WHO WE ARE
WHO WE ARE
MISSION, VISION AND VALUE PROPOSITION

An Overview of the INC Philosophy

The INC is the international umbrella organization for the nut and dried fruit industry. Our members embody the whole scope of the nut and dried fruit supply chain, totaling over 900 companies that span across 80 countries and represent over 85% of the world commercial trade. At present, total supply value is estimated at US$47 billion and total trade value stands at US$34 billion.

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.

Membership represents 85% of the sector’s world commercial trade
Total supply value estimated at over US$47 billion
Total trade value stands at US$34 billion
Today INC membership stands at 900 companies from 80 countries across the entire supply chain.
INC MEMBERSHIP

The Best Way to Empower Your Business

Being a member of the INC is more than just being part of an organization, it makes you part of a global network that spans across over 80 countries with a common goal: supporting the sustainable growth of the nut and dried fruit industry.

Member Benefits

The benefits you get as an INC member are numerous and all aim to help you grow your business globally:

- **DIRECT CONTACT WITH OVER 900 TOP BUSINESS LEADERS FROM MORE THAN 80 COUNTRIES**
- **DISCOUNTS AND SPONSORSHIP OPPORTUNITIES AT THE WORLD NUT AND DRIED FRUIT CONGRESS**
- **EXHIBIT AT TOP TRADE FAIRS WITH THE INC PAVILION**
- **DISCOVER THE LATEST INDUSTRY NEWS WITH WEEKLY NEWSLETTERS**
- **ADVERTISE TO A NICHE AUDIENCE IN INC PUBLICATIONS**
- **ACCESS TO OVER 700,000 INDUSTRY STATISTICS**
- **SPECIAL PRICES FOR THE INC ACADEMIA EDUCATION PROGRAM**
- **ACCESS THE CERTIFIED INC SHORT FORM CONTRACT**
- **DIRECT CONTACT WITH OVER 900 TOP BUSINESS LEADERS FROM MORE THAN 80 COUNTRIES**
- **DISCOUNTS AND SPONSORSHIP OPPORTUNITIES AT THE WORLD NUT AND DRIED FRUIT CONGRESS**
- **EXHIBIT AT TOP TRADE FAIRS WITH THE INC PAVILION**
- **DISCOVER THE LATEST INDUSTRY NEWS WITH WEEKLY NEWSLETTERS**
- **ADVERTISE TO A NICHE AUDIENCE IN INC PUBLICATIONS**
- **ACCESS TO OVER 700,000 INDUSTRY STATISTICS**
- **SPECIAL PRICES FOR THE INC ACADEMIA EDUCATION PROGRAM**
- **ACCESS THE CERTIFIED INC SHORT FORM CONTRACT**

Did You Know?

In addition to the direct benefits of membership, the INC also works tirelessly behind the scenes through a number of initiatives that benefit the industry as a whole, always with the ultimate goal of boosting consumption by balancing supply and demand. Our actions include:

- The INC has invested **€6 million to date in research and activities that promote nut and dried fruit consumption**, including both consumer-facing dissemination in key markets and on-the-ground outreach to high-level officials and international corporations to make the case for free trade.
- We are committed to the **sustainability** of the sector, as reflected by the INC Manifesto as well as our ongoing Reforestation Project.
- We monitor **international regulations**, advise on standards and reach out to government officials as needed to further the interests of the industry and enhance market access.
- Through our world-renowned and recognized **statistics** we aim to increase the understanding of production, processing, marketing, distribution and consumption trends.
- We **promote and support research** and bring together world-class researchers to define research priorities with the aim of securing future **health claims** to allow us to better promote consumption of nuts and dried fruits in markets across the globe.
WHO WE ARE
INC 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 – INC Chairman
- Ashok Krishen, ofi, Singapore – INC 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy – INC Co-founder and Chairman of the Sustainability, Scientific & Government Affairs Committee
- Kai Bockmann, Blue Diamond Growers, USA
- Riccardo Calcagni, Besana Group, Italy
- Jose Eduardo Camargo, QueenNut Macadamia, Brazil
- Bill Carriere, Carriere Family Farms, USA
- Christina Chen, Chacha Food, China
- Mia Cohen, Setton Pistachio of Terra Bella, Inc., USA
- Roby Danon, Voicevale, UK
- Cao Derong, China Chamber of Commerce, China
- Gary Ford, Diamond Foods, USA
- Joan Fortuny, De Prado Almonds, Spain
- Giles Hacking, CG Hacking & Sons Limited, UK
- Mike Hohmann, The Wonderful Company, USA
- Hide Honda, Shoei Foods Corporation, Japan
- Cheng Hung Kong, CHK Trading Co. Ltd., Hong Kong, China
- Maria José Llopis, Almendras Llopis, S.A., Spain
- Jack Mariani, Mariani Nut Company, USA
- Lalo Medina, Pecan Grove Farms, USA
- Stephen Metzler, Balcorp Ltd., Canada
- Russell Mooney, Intersnack Procurement B.V., Netherlands
- Prapat Nair, Vijayalaxmi Cashew Company, India
- Osman Oz, Aegean Exporters Associations, Türkiye
- Varee Pholphaisan, Heritage Snacks and Food Co., Ltd., Thailand
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain – INC Honorary and Founding President
- Antonio Pont Jr., Crisolar Nuts, S.L., Spain
- Jan Vincent Rieckmann, August Töpfer and Co., Germany
- Hasan Sabir, Sabir Findik Ihracat Ltd. Sti., Türkiye
- Dirk Schmidt, Bösch Boden Spies GmbH and Co Kg, 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 – INC Chairman
- Ashok Krishen, ofi, Singapore – INC 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy – INC Co-founder and Chairman of the Sustainability, Scientific & Government Affairs Committee
- Bill Carriere, Carriere Family Farms, USA
- Giles Hacking, CG Hacking & Sons Limited, UK
- Jack Mariani, Mariani Nut Company, USA
- Prapat Nair, Vijayalaxmi Cashew Company, India
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain – INC Honorary and Founding President
- Goretti Guasch, INC Secretary General and Executive Director

AMBASSADORS
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.

- Jan Vincent Rieckmann, August Töpfer and Co., Germany – Committee Chairman
- Oscar Vergara, Vergara y CIA, Argentina
- Michael Waring, MWT Foods, Australia
- Declan Dart, Trumps, Australia
- Gaetan de Lannoy, Quality Marketing BVBA, Belgium
- Jose Eduardo Camargo, QueenNut Macadamia, Brazil
- Stephen Metzler, Balcorp Ltd., Canada
- Ranjeet Walia, Chi Commodities Handlers Inc., Canada
- Sebastián Plaza, Frutexsa, Chile
- Rafael Bianchini, Frunut SpA, Chile
- Chen Ying, China Chamber of Commerce, China
- Chen Xianbao, Chacha Food, China
- Cheng Hung Kay, CHK Trading Co. Ltd., Hong Kong, China
- Richard Monnier, Monnier & Partners, France
- Alex Sumar, Voicevale France, France
- Miriam Gauthier, Bösch Boden Spies, Germany
- Elias Pagkalos, Elamer, Greece
- Raju Bhatia, California Agri Nuts Corporation, India
- Pankaj Sampat, Samsons Trading, India
- Prapat Nair, Vijayalaxmi Cashew Company, India
- Behroz Agah, Iran Pistachio Association, Iran
- Alessandro Annibali, New Factor SpA, Italy
- Hiroto Nakajima, Toyo Nut, Japan
- Mbugua Ngugi, Kenya Nut Company, Kenya
- Hani Akzam, Noorco, Lebanon
- Parissa Rafi, Irico Trading & Production, Luxembourg
- Tarek Rahmo, Maestro Nut, Moldova
- Kees Blokland, Global Trading & Agency, Netherlands
- Jelle van de Sandt, J.M. van de Sandt B.V., Netherlands
- Christopher Harlem, Harlem Food, Norway
- Oliver Sio, Primex Group, Philippines
- Alex Whyte, Green & Gold Macadamias, South Africa
- Alan Sutton, Sabie Valley Macadamias, South Africa
- Miquel Borràs, Crisol de Frutos Secos, Spain
- Stefan Boden, AB Bodén & Lindeberg, Sweden
- Prince Pholphaisan, Heritage Snacks and Food Co., Ltd., Thailand
- Ahmet Boujbel, Boudjebel, Tunisia
- Ahmet Bilge Goksan, Osman Akça, Türkiye
- Hasan Sabir, Sabir Findik Ihracat Ltd., Türkiye
- Jafar Moallem, Jafar Moallem Trading Co., UAE
- Mahmoud Akrin, Al Jameel International, UAE
- Edward Danon, Voicevale, UK
- Craig Duerr, Campos Brothers Farms, USA
- James Warner, J. Warner, Inc., USA
- Jeffrey Sanfilippo, John B. Sanfilippo & Son, Inc., USA
- Steve Sousa, Mariani Packing Co., USA
- Marc Rosenblatt, Richard Franco Agency, USA
- Vu Thai Son, Long Son, Vietnam
ACADEMIC COMMITTEE
This committee advises the INC on the continued good development of the educational programs of the Academia.

- Lalo Medina, Pecan Grove Farms, USA – Committee Chairman
- Antonio Pont, Borges Agricultural and Industrial Nuts (BAIN), Spain – INC Executive Committee Representative
- Pino Calcagni, Besana Group, Italy
- Joan Fortuny, De Prado Almonds, Spain
- Ashok Krishen, ofi, Singapore
- Hari Nair, Western India Cashew Company, India
- Jan Vincent Rieckmann, August Töpfer and Co., Germany
- Jeffrey Sanfilippo, John B. Sanfilippo and Son, USA
- Steve Sousa, Mariani Packing Company, USA
- Prof. Dr. Uygun Aksoy, Consultant, Türkiye
- Prof. Cesarettin Alasalvar, TUBITAK Research Center, Türkiye
- Prof. Jordi Salas-Salvadó, Rovira i Virgili University, Spain
- Dr. Linda Tapsell, University of Wollongong, Australia

COMMITTEE MEMBERS
- Assoc. Prof. Cesarettin Alasalvar, FIFT, TUBITAK, Türkiye
- Dr. Josefina Bressan, Federal University of Viçosa, Brazil
- Dr. Crystal Haskell-Ramsay, Northumbria University, UK
- Prof. Catherine Isaioopolous, RMIT University, Australia
- Dr. Penny Kris-Etherton, Penn State University, USA
- Maureen Ternus, INC Nutrition Research and Education Foundation, USA

STATISTICS COMMITTEE
The INC’s Statistics Committee assists in the collection and analysis of statistical data for distribution to industry, governments and the general public.

- Roby Danon, Voicevale, UK – Committee Chairman

LEADERS OF THE WORKING GROUPS:
- Almonds: Julie Adams, Almond Board of California, USA
- Brazil Nuts: Edward Danon, Voicevale, UK
- Cashews: Ümit Ergin, ofi, USA
- Hazelnuts: Ahmet Bilge Anbarlilar, Balsu Gida, Türkiye
- Macadamias: Lizel Pretorius, Macadamias South Africa, SAMAC, South Africa
- Pecans: Dan Zedan, Pecan Grove Farms, USA
- Pine Nuts: Chen Ying, China Chamber of Commerce, China
- Pistachios: Mike Hohmann, The Wonderful Company, USA
- Walnuts: Jinu Zhou, Fen Yang Reell Food Co., Ltd., China
- Peanuts: Chen Ying, China Chamber of Commerce, China
- Dates: Ahmed Boujelb, Boudjelb, Tunisia
- Dried Apricots: Ece Tirkaz, Aagean Exporters’ Associations, Türkiye
- Dried Cranberries: Lee Doleman, Ocean Spray, USA
- Dried Figs: Guillaume Pagy, Pagysa & Nova Fruits International, Türkiye
- Prunes: Donn Zea, California Prune Board, USA
- Raisins, Sultanas and Currants: Ece Tirkaz, Aagean Exporters’ Associations, Türkiye

SUSTAINABILITY, SCIENTIFIC & GOVERNMENT AFFAIRS COMMITTEE
This committee monitors sustainability issues and international regulations/standards that may have an impact on the sector.

- Pino Calcagni, Besana Group, Italy – Committee Chairman

SUSTAINABILITY WORKING GROUP
- Miriam Gautier, Bosch Boden Spies, Germany – Working Group Chair
- Christina Chen, ChaCha Food, China
- Tommaso de Gregorio, Ferrero Hazelnut Company, Luxembourg
- Jeanette Gonnemann, Waren-Verein der Hamburger Börse e.V., Germany
- Rachael Goodhue, University of California, Davis, USA
- Jodie Johnston, Marks and Spencer Food, UK
- Gabriele Ludwig, Almond Board of California, USA
- Toño Pons, Importtaco, Spain
- Otto Schacht, Kuehne+Nagel, Germany
- Bas van den Brink, Intersnack Procurement, Netherlands
- Philipp Wagner, Lidl International, Germany
- Chen Ying, China Chamber of Commerce, China

SCIENTIFIC WORKING GROUP
- Miriam Villed, Stahmann Webster, Australia – Working Group Chair
- Nildfer Altan, Eurofins, Germany
- Cheng Hung Kay, CKH Trading Co. Ltd., Hong Kong, China
- Jodie Johnston, Marks and Spencer Food, UK
- Tom Jones, Safe Food Alliance, USA
- Monica Molero, Importtaco, Spain
- Brendan O’Donnell, TOMRA Sorting, USA
- Dr. Cesarettin Alasalvar, TUBITAK Research Center, Türkiye
- Assoc. Prof. Cesarettin Alasalvar, FIFT, TUBITAK, Türkiye
- Prof. Dr. Uygun Aksoy, Consultant, Türkiye
- Julie Adams, Almond Board of California, USA – Representative
- Rachael Goodhue, University of California, Davis, USA – Representative

BUSINESS INTEGRITY COMMITTEE
This committee promotes and raises awareness of codes, practice and guidelines with regard to honest and diligent business.

- Antonio Pont Jr., Crisolar Nuts, S.L., Spain – Committee Chairman
- Pratap Naik, Vijayalaxmi Cashew Company, India
- Giles Hacking, CG Hacking & Sons Limited, UK
- Bill Carriere, Carriere Family Farms, USA
- Steven Meltzer, Balcorp Ltd., Canada
- Maureen Ternus, INC Nutrition Research and Education Foundation, USA
- Chris Jackson, Almond Board of California, USA
- Tom Jones, Safe Food Alliance, USA
- Steve Sousa, Mariani Packing Company, USA
- Bobbi Dugan, OFIA, USA

INC WORLD FORUM FOR NUTRITION RESEARCH AND DISSEMINATION
This committee brings together world-class researchers in defining research priorities and monitoring the research grants supported by the INC.

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

ACADEMIC HONORARY MEMBERS
- Dr. David Jenkins, St. Michael’s Hospital, Toronto, Canada
- Dr. Penny Kris-Etherton, Penn State University, USA
- Prof. Gerhard Rechkemmer, Max Rubner-Institut, Germany
- Dr. Emilio Ros, Hospital Clinic, Barcelona, Spain
- Dr. Joan Sabatié, Loma Linda University, California, USA
- Dr. John O’Neill, Zerus UK & Ireland, UK
- Guillaume Pagy, Pagysa – Nova Fruits, Türkiye
- Jochen Riehle, Institut für Hygiene und Umwelt Hamburg, Germany

INTERNATIONAL GOVERNMENT AND REGULATORY AFFAIRS WORKING GROUP
- Faisal Alderea, Khalid Derar’s Alderea and His Partner Company Ltd., Saudi Arabia
- Raju Bhatia, California Agri Nuts Corporation, India
- Cao Derong, China Chamber of Commerce, China
- Mike Hohmann, Wonderful Pistachios & Almonds, USA
- Golchin Kamali, Barry Callebaut, Switzerland
- Rahul Kamath, Bolas Agro Pvt. Ltd., India
- Ashok Krishen, ofi, Singapore
- Ellie Osman, Minerva Global, UK
- Daowei (David) Pan, Three Squirrels, China
- Mauro Trevisani, Treehouse California Almonds, USA

INCOMING HONORARY MEMBERS
- Assaf Karz, Israel
- Prof. Dr. Uygun Aksoy, Consultant, Türkiye
- Burcu Türkay, ofi, Türkiye
- António Pont Jr., Crisolar Nuts, S.L., Spain – INC Executive Committee Representative
- Tom Jones, Safe Food Alliance, USA
- John O’Neill, Zerus UK & Ireland, UK
- Guillaume Pagy, Pagysa – Nova Fruits, Türkiye
- Jochen Riehle, Institut für Hygiene und Umwelt Hamburg, Germany

FUTURE COMMITTEE CHAIRMAN
- John O’Neill, Zerus UK & Ireland, UK
- Guillaume Pagy, Pagysa – Nova Fruits, Türkiye
- Jochen Riehle, Institut für Hygiene und Umwelt Hamburg, Germany

WHO WE ARE
COMMITTEES

10
SUSTAINABILITY
An Integral Component of Industry Growth

The INC publicly calls for the nut and dried fruit industry to accelerate sustainability commitments that are tangible, quantifiable, and measurable. The INC believes that all actors throughout the supply chain can take action to tangibly improve and communicate how the industry is contributing to five key UN Sustainable Development Goals (SDG):

- **Goal 2:** End hunger, achieve food security and improved nutrition and promote sustainable agriculture
- **Goal 6:** Ensure availability and sustainable management of water and sanitation for all
- **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

**Sustainability Communications**

Throughout the year, the INC published news items on sustainability-related topics on our website and in our magazine, and distributed this content to members via newsletters. Subjects covered included the following:

- Food security
- Biodiversity
- Carbon removal
- Packaging waste
- Circular economy
- Reversing pollinator decline
- Organic farming
- Green claims
- Corporate sustainability due diligence
- Fighting deforestation
- Traceability
- Landscape restoration
- Soil monitoring
- Sustainability reporting standards
- Sustainable pesticide use

**Key Actions in 2023**

- **Meeting with UNECE/FAO Forestry and Timber Section**
  In January, the INC traveled to Geneva to meet with the chief of the UNECE/FAO Forestry and Timber Section, which supports Member States and regional economic integration organizations in their efforts to sustainably manage forests.

- **Sustainability Project: Reforestation**
  In February, the Executive Committee approved reforestation as the focus of the INC’s sustainability project. Under the project, the INC will provide technical advice and support to countries with reforestation plans.

- **Meeting with the FAO Mountain Partnership**
  In February, the INC met with the FAO Mountain Partnership, a voluntary alliance of governments and organizations committed to working together with the common goal of achieving sustainable mountain development around the world.

- **Meeting of the UNECE Specialized Section on Standardization of Dry and Dried Produce**
  In June, the INC gave a presentation on the impacts of climate change on the production of nuts and dried fruits. The presentation highlighted solutions to address this issue as well as advances spearheaded by the industry.

- **Sustainability Seminar**
  In May, at the INC Congress in London, Dr. Rachael Garrett, Moran Professor of Conservation and Development at the University of Cambridge, spoke about the bioeconomy of standing forests and the many synergies that the nut and fruit industry has with forest conservation.

- **Meetings with stakeholders**
  Throughout 2023, the INC has held meetings with various stakeholders, inviting them to join us in our Sustainability Project because of their relevance to the subject of reforestation.
COUNTRY OUTREACH

Global Program for a Better World

As part of the INC’s strategic plan, a key initiative was to engage with big retailers and manufacturers, as well as organizations, to see how collaborations can be formed to aid in the current issue of supply and demand and boost global consumption.

With the aim to accomplish this goal, in 2023 the INC undertook successful on-the-ground activity in India, China and Europe, where an INC delegation visited key top governmental officials, retailers and manufacturers.

The main objectives of this activity were:

- Discuss balancing supply and demand by making the INC’s stance on free trade heard through discussing trade barriers and other initiatives to increase global consumption.
- Build up the global reputation of the INC as the key entity to aid in the sustainable growth of the industry.
- Share the importance of helping new generations to make the right choices for healthy eating by encouraging the daily intake of nuts and dried fruits all over the world.

In 2023, an INC delegation travelled to India, China and Europe to attend high-profile events and hold meetings with key governmental officials and top retailers and manufacturers. Countries to be targeted in 2024 include Brazil, Argentina, Chile, Italy Spain and the United States.
WHAT WE DO
FROM MAY 22-24, 2023, THE INC XL WORLD NUT & DRIED FRUIT CONGRESS GATHERED TOGETHER IN LONDON. OVER 1,283 COMPANY OWNERS, PRESIDENTS AND CEOs FROM 63 COUNTRIES CAME TOGETHER FOR 3 DAYS OF NETWORKING, DOING BUSINESS AND ADDRESSING THE FUTURE OF THE INDUSTRY.
ANNUAL REPORT 2023

WHAT WE DO

XL WORLD NUT AND DRIED FRUIT CONGRESS

INC Awards

The INC Awards are the Oscars of the nut and dried fruit industry, recognizing outstanding achievement in various categories.

IN 2023

May 22-24, 2023

INC Awards

Individual Golden Nut Award
Goretti Guasch, INC Executive Director

Mrs. Guasch received the top honor for her 25 years of service to the industry. Her forward-thinking strategic planning and vision of long-term growth helped the INC become a leading global organization whose membership represents over 85% of the sector’s commercial trade.

Corporate Golden Nut Award
Voicevale, United Kingdom

An importer and distributor of nuts, dried fruits, seeds and coffee to industries around the world, Voicevale provides its customers with a service that aims to ensure food safety in products, price stability, knowledge of impending markets as well as future supply and demand dynamics.

Excellence in Gastronomy Award
Chef Michel Albert Roux

Besides serving as chef patron of London’s iconic two-Michelin-starred Le Gavroche restaurant, Chef Roux is also a familiar face on television and the author of several books, including Le Gavroche Cookbook, The Marathon Chef and Matching Food and Wine.

Excellence in Research Award
Prof. Gideon Lack, Professor of Pediatric Allergy at King’s College London

Prof. Lack received the award for his work on the prevention of peanut allergy. His groundbreaking LEAP (Learning Early About Peanut allergy) study showed that early consumption of peanuts in atopic infants reduces the development of peanut allergy by >80%.

Innovation Award
VKC Nuts, India

Indian firm VKC Nuts received the award for its Nutraj Bactopure product range. Each batch undergoes a validated process for annihilating pathogens and is certified “pathogen-free” by an accredited lab. Consumers can access a batch-level quality-control certificate via a QR code printed on each package.

Excellence in Sustainability Award
ofi, Singapore

This award, newly created this year, was presented to ofi (Olam Food Ingredients) for the project Creating Collaborative Trails to Sustainable Nuts, which represents more than a decade of establishing and implementing programs to improve the environmental and social impact of almonds, cashews and hazelnuts.
WHAT WE DO

XL WORLD NUT AND DRIED FRUIT CONGRESS

Keynotes and Guest Speakers

Edurne Pasaban, mountaineer
Ambition. Desire to improve. Passion. Motivation. In her riveting talk, Ms. Pasaban unpacked the contents of the metaphorical “backpack” that has allowed her to become the first woman to climb all 14 eight-thousanders. Ms. Pasaban also stressed the importance of surrounding oneself with a good team—a factor that, on at least one occasion, meant the difference between life and death. As she described the ordeal, you could hear a pin drop in the Great Room—if not for the muffled sobs of audience members moved to tears.

Virginia Stagni, Head of Business Development and FT Talent Director, Financial Times
Born in 1993, Ms. Stagni holds a BSc from Bocconi University and an MSc in Media and Communications from the London School of Economics. As the youngest manager at the Financial Times in its over-130-year history, she has played a central role in the British newspaper’s strategic growth. In her talk, Ms. Stagni shared insights about “how we can be customer-first and how we can better understand our future customers”—a lesson with applicability across industries.

Dr. Rachael Garrett, Moran Professor of Conservation and Development, University of Cambridge
Forest health was the main topic addressed by Dr. Garrett. She introduced the concept of bioeconomy of standing forests—a system of producing goods and services to support well-being and equity through the preservation of healthy, standing forests and flowing rivers—and argued that the nut and dried fruit industry is uniquely poised to position itself as a more sustainable agricultural sector because it has many synergies with forest conservation.

Prof. Gideon Lack, Professor of Pediatric Allergy at King’s College London
Prof. Lack shared what the results of his groundbreaking LEAP (Learning Early About Peanut allergy) study tell us about how to prevent peanut allergy in young children. The findings of this research show that peanut allergy can be prevented almost completely by feeding peanut-containing foods to babies very early in life, from four to six months of age. Prof. Lack argued that insights from the LEAP study should be implemented more thoroughly in nutrition guidelines.

Dr. Marta Guasch-Ferré, Associate Professor in the Department of Public Health, Novo Nordisk Foundation Center for Basic Metabolic Research at the University of Copenhagen
Dr. Guasch-Ferré explained how the NUTPOOL project—a proposal that emerged from the historic INC-hosted NUTS 2022 meeting of international researchers—will allow researchers to obtain powerful evidence of the health benefits of nuts, thanks to a uniform study design and more than 1 million participants worldwide.
The Best Education for the Nut and Dried Fruit Industry

Since its launch in 2018, the INC Academia has successfully helped 254 students in their professional development. This program is a pioneer in education within the nut and dried fruit sector, offering professionals the opportunity to learn from leading experts and connect with like-minded peers. The two online programs—Basic and Advanced—are ideal for anyone new to the industry, but also suitable for more seasoned professionals.

In 2023, the INC updated the online content with the latest industry updates to keep information relevant and ensure students have the best learning experience. To highlight, the statistics information was updated to reflect current trends in production, trade and consumption and the Marketing Insights lesson was updated to cover hot topics in the nut and dried fruit industry.

### Program Content

#### Basic
- Origin and description
- Soil and climate
- Varieties and uses
- Health and nutrition
- Harvesting and processing
- Food safety and quality standards
- Production, trade and consumption
- Market insights
- Negotiation

#### Advanced
- Retail packing
- Contaminant detection and allergen management
- International market opportunities
- Cross-cultural negotiations
- Risk and insurance
- Maritime shipping and logistics
- International commercial terms
- INC contract
- Payment methods
- Arbitration rules
- Holistic approach to sustainability

### Academia in Figures

- **254 Students**
- **43 Countries**

### Company Position

- **51% Managers**
- **18% CEOs**
- **6% Technicians**
- **21% Sales & Marketing**
- **5% Others**
INC ACADEMIA ON-SITE COURSE

One of the Best Ways to Network with Like-Minded Peers

The 2023 INC Academia On-site Course, held in the United Kingdom, focused on the industrial side of the nut and dried fruit sector. From a strategic home base in Stratford, East London, students were treated to a behind-the-scenes look at major players in the industry’s value chain.

The course took place from May 18-20, right before the INC Congress in London. Attendees had the unique chance to visit the Port of Felixstowe, the UK’s busiest container port; the factory of multinational plant equipment manufacturer Bühler; Chelmer Foods’ distribution center for dried fruits, nuts, seeds and pulses; and one of the largest distribution centers in Europe, LDH (La Doria). Plus, participants visited some of the UK’s most important supermarket chains to see how the products are marketed to Britain’s consumers. Finally, the program wrapped up with a lecture on negotiation by Prof. Kandarp Mehta from the award-winning IESE Business School.

May 18
Visit to factory: Bühler
Visit to distribution center: Chelmer Foods

May 19
Visit to the Port of Felixstowe
Visit to distribution center: LDH (La Doria)

May 20
Visit to UK’s top supermarkets chains
Lecture on negotiation by Prof. Kandarp Mehta, IESE Business School

May 24 (INC Congress)
Presentation of certificates for 2023 students and cocktail reception for alumni
In 2023, the INC exhibited in Gulfood, Dubai, and Anuga, Cologne, with the INC Pavilion. Located in prime locations at each fair, the INC Pavilion provides our co-exhibitors with a unique opportunity to grow their business in new markets and network with industry giants, all under the INC umbrella. And, with our designated meeting area, the INC Pavilion is the place to be for the nut and dried fruit sector.

**GULFOOD 2023**
**FEBRUARY 20-24**

**INC PAVILION IN NUMBERS**

- **18** COMPANIES
- **9** COUNTRIES
- **168** PAVILION SPACE

**GULFOOD IN NUMBERS**

- **100,000** VISITORS
- **5,000** EXHIBITORS
- **125** COUNTRIES

**ANUGA 2023**
**OCTOBER 7-11**

**INC PAVILION IN NUMBERS**

- **24** COMPANIES
- **15** COUNTRIES
- **320** PAVILION SPACE

**ANUGA IN NUMBERS**

- **150,000** VISITORS
- **7,900** EXHIBITORS
- **200** COUNTRIES
WHAT WE DO

PUBLICATIONS

Newsletters
Throughout 2023, the INC sent out various types of newsletters with the aim of sharing updates, information and knowledge with our members and the wider world. Our industry newsletters contained pertinent insights for all industry members, typically in the form of legal updates, health news or timely statistics. Our consumer newsletters shared recipes, blog posts and articles that illustrate the wonders of nuts and dried fruits. Special newsletters highlighted the INC Congress or other important events and activities.

49 Newsletters Sent in 2023

- Legal/statistics: 11
- Health: 11
- Consumer: 10
- Congress: 11
- Magazine: 3
- General: 2

122,366 Newsletter Views

Top 5 countries:
- USA
- Türkiye
- UK
- Spain
- Australia

INC newsletters share updates, information and knowledge with our members and the wider world.

Chinese Translation
In 2023, the INC sent out 11 Chinese-language newsletters covering the most pressing topics for the nut and dried fruit industry. This monthly recap is sent out by email in the form of an INC-branded PDF document to 288 Chinese-speaking recipients.
WHAT WE DO

PUBLICATIONS

Nutfruit Magazine

As the official voice of the INC Foundation for the nut and dried fruit world, Nutfruit provides a diverse range of content of interest to the industry. As in previous years, the INC published three issues of the magazine, in March, July and November 2023.

Highlights of the year included an interview with Christina Chen, Vice Chairman of ChaCha Food, that touched on the topics of sustainability, innovation and the evolving tastes of young consumers in China. The world-renowned pediatric allergist Prof. Gideon Lack contributed an article about the groundbreaking LEAP study on preventing peanut allergy. Liliana Annovazzi-Jakab, Chief of the UNECE/FAO Joint Forestry and Timber Section, penned a feature article on forest restoration, and Dr. Alireza Pourreza of UC Davis wrote about new breakthroughs in the use of artificial intelligence to improve yield forecasting. And as ever, the regular sections of the magazine kept readers abreast of developments in the INC and the world of nuts and dried fruits.
In 2023, the INC funded two projects for promotion and dissemination.

- Toronto 3D Knowledge Synthesis and Clinical Trials Foundation: 40th International Symposium on Diabetes and Nutrition: Nuts and Diabetes Symposium and Presentation
- Australian Nut Industry Council: Application and dissemination of novel regulatory changes: High-level health claim and energy calculations for nuts

### TOPICS COVERED

- Cardiovascular health
- Cognitive function
- Gut health
- Weight management
- Exercise performance
- Fertility

### FUNDED PROJECTS IN NUMBERS

- €6 million spent to date on funding projects promoting benefits of nuts and dried fruits
- 21 grants given to external promotion and dissemination projects
- 16 health research studies funded
- 12 nutrition symposia sponsored in 9 countries

### NUTS 2022 SPECIAL ISSUE

In 2023, the prestigious journal *Nutrients* published a special issue entitled “Nuts: Where We Are and Where We Are Going in Research. Proceedings from the NUTS 2022 International Conference.” This publication was a direct result of a historic gathering of international nutrition researchers hosted by the INC.

The 10 articles included in the special issue represent each of the overarching themes discussed by the experts at the meeting:

In 2023, an INC-funded intervention study yielded two new publications. *Clinical Nutrition* published an article titled "Longer-term mixed nut consumption improves brain vascular function and memory: A randomized, controlled crossover trial in older adults," which showed that eating nuts as part of a recommended diet over the longer term had a beneficial effect on brain vascular function, which may relate to the observed beneficial effects on memory in older adults.1 Another article, titled "Mixed nut consumption improves brain insulin sensitivity: a randomized, single-blinded, controlled, crossover trial in older adults with overweight or obesity" and published in the *American Journal of Clinical Nutrition*, showed that eating mixed nuts over the longer term affected insulin action in brain regions involved in the modulation of metabolic and cognitive processes in older adults with overweight or obesity.2

Additionally, the *Journal of Nutritional Science* published a study, funded by the global macadamia industry, showing that macadamia consumption does not lead to weight gain and may have other positive benefits on cardiometabolic risk factors for overweight and obese adults. The call was coordinated by the INC World Forum for Nutrition Research and Dissemination.

In September, the INC sponsored the symposium "Nut Consumption and Prevention of Prevalent Diseases/Conditions" as part of the 14th Asian Congress of Nutrition in Chengdu, China. The INC brought four leading experts to speak at the symposium on the body of evidence showing that frequent nut consumption is associated with a lower risk of heart disease and death, the research supporting the role of nut-containing diets in preserving cognitive function, and the potential of nuts in the prevention and management of type 2 diabetes. While in Chengdu, the INC also attended the 9.17 China Nuts Health Week, organized by the Specialized Committee for Nuts and Dried Fruits of the China National Food Industry Association.

The INC also contributed to the International Tree Nut Council Nutrition Research & Education Foundation (INC NREF), a US-based non-profit organization dedicated to promoting the health benefits of tree nuts and supporting nutrition research and education for consumers and health professionals.

In 2023, the INC Executive Committee approved funding for the NUTPOOL study, an initiative that emerged from the historic NUTS 2022 gathering of international researchers at the INC headquarters late last year.

With over 1 million participants, this three-year, multi-country meta-analysis will be the first of its kind to explore the epidemiologic relation between nut consumption and the risk of a number of chronic diseases. The study will use a standardized approach to ensure that its findings are representative of the worldwide population.

NUTPOOL will play a key role in advancing goal #2 of the INC Strategic Plan: Prioritize key areas of focus for health and nutrition research. The study will be groundbreaking for the nut and dried fruit industry, providing extensive data to support health claims—all with the ultimate goal of boosting consumption.

Regions Studied

- NORTH AMERICA
- EUROPE
- ASIA
- OCEANIA

NUTPOOL will explore the relationship between nut consumption and risk of:

- Tipo 2 diabetes
- Cardiovascular disease
- Coronary heart disease
- Stroke
- Cancer
- Dementia
- Alzheimer’s disease
- Parkinson’s disease
- Mortality

Relevance and Novelty

- Unprecedented scale and scope
- Cutting-edge methods and standardization
- Unique insights into nut consumption
- Risk stratification
- Addressing selection bias

3 years

>1 million participants
MARKETING & COMMUNICATION
MARKETING & COMMUNICATION
SOCIAL MEDIA
Reaching 27 Million People Globally in 2023

INDUSTRY
In 2023, the INC integrated paid promotion into its overall strategy, contributing to the industry channels’ ability to reach an audience of 7.8 million people. The industry channels share INC news, activities and general updates about the sector. Below are key achievements to note for 2023:

- **LinkedIn**
  - 12,500 followers
  - 82 publications
  - 733.1 K interactions on posts

- **Instagram**
  - 1,400 followers
  - 72 publications
  - 7.1 M people reached
  - 7.7 M interactions on posts

- **YouTube**
  - 130 subscribers
  - 2 publications
  - 3.3 K video views

- **Twitter**
  - 2,700 followers
  - 135 publications
  - 18 K interactions on posts

CONSUMER
In 2023, the INC persistently advanced its content outreach to engage with the Generation Z audience, successfully reaching a global audience of 19.2 million Gen Z globally. Contents focused on nutrition and knowledge and sharing consumption moments. Highlights for 2023 on each channel are as follows:

- **LinkedIn**
  - 28,700 followers
  - 50 publications
  - 9.6 M people reached
  - 10.9 M interactions on posts

- **Instagram**
  - 12,600 followers
  - 42 publications
  - 6 M video views

- **YouTube**
  - 8,100 subscribers
  - 71 publications
  - 1.5 M video views

- **Twitter**
  - 237,400 fans
  - 48 publications
  - 2.1 M people reached
  - 2.9 M interactions on posts
WEBSITES
Spreading the Message of Healthy Goodness Worldwide

INDUSTRY WEBSITE
INC.NUTFRUIT.ORG

The industry website provides the sector with up-to-date information on the latest updates in the nut and dried fruit sector such as tariff changes, newly published scientific studies and INC activities.

HIGHLIGHTS FROM 2023

37,000 USERS
171,000 PAGE VIEWS
170 NEWS ITEMS PUBLISHED

TOP 5 COUNTRIES
USA
SPAIN
TÜRKIYE
INDIA
UNITED KINGDOM

DEVICES
MOBILE 26%
TABLET 1%
DESKTOP 73%

CONSUMER WEBSITE
NUTFRUIT.ORG

The consumer website provides users with inspirational content such as recipes and nutrition tips to encourage people to include nuts and dried fruits in their daily diet.

HIGHLIGHTS FROM 2023

41,000 USERS
73,555 PAGE VIEWS
18 RECIPES UPLOADED
12 BLOG ARTICLES PUBLISHED

TOP 5 COUNTRIES
USA
SPAIN
TÜRKIYE
INDIA
UNITED KINGDOM

DEVICES
MOBILE 55%
DESKTOP 44%
TABLET 1%
MARKETING & COMMUNICATION

CREATIVE CONTENTS
Tips to Encourage Global Consumption

To help spread the goodness of nuts and dried fruits all over the world the INC creates a number of engaging short videos and recipe content to encourage nut and dried fruit consumption. The videos are aimed primarily at Gen Z and in 2023 have seen great success across our consumer social media networks.

**SHORT VIDEO CONTENT HIGHLIGHTS FROM 2023**

- **9** Nutrition and knowledge videos created
- **1.3 M** Views across Instagram, TikTok, YouTube and Facebook

**TOTAL CONTENTS TO DATE**

- **86** Videos created
- **10 M** Views across Instagram, TikTok, YouTube and Facebook

**RECIPES HIGHLIGHTS FROM 2023**

- **18** Recipes uploaded on NutFruit Digital Channels
- **9 M** Views across Instagram, TikTok, YouTube and Facebook

**TOTAL RECIPES TO DATE**

- **120** Recipes created
- **15 M** Views across Instagram, TikTok, YouTube and Facebook
Marketing & Communication

Multi-Country Dissemination Plan

Continuing to Grow Our Presence to China’s Gen Z

The INC’s marketing campaign in China was launched in May 2022 and has now reached 99 million members of Generation Z in China. To refine our approach, in 2023 the campaign in China was broken down into three sub-campaigns, taking into consideration both lifestyle and consumption trends in the region. The campaigns focused on nuts and dried fruits as the perfect snack when studying for GaoKao (China’s university admission exam), nuts and dried fruit ice creams for the hot summer months, and nuts and dried fruits as hot or cold beverage toppings, a key trend sweeping through Asia. The campaigns were run across the social media networks WeChat, Weibo and Douyin (Chinese TikTok) and reinforced through influencer collaborations, helping the initiative gain an impressive 99.4 million reach and 1.2 million interactions. What’s more, the ice cream campaign’s custom hashtag secured a spot among the top 51 trending topics on Douyin.

Collaborations in China

To expand on the reach of the new dissemination plan in China, in 2023 the INC signed collaboration agreements with INC members ChaCha and Three Squirrels. The agreements will see the INC come together with both entities to share each other’s online content, helping to mutually spread the benefits of nut and dried fruit consumption across China.

China Campaign Proposal for 2024

The 2024 campaign will continue to empower Generation Z to nourish their journey with the goodness of nuts and dried fruits. Through engaging content and situations, we will empower Gen Z to break free from conventions and follow their passions, all while enjoying the nourishing benefits of nuts and dried fruits. The slogan of the campaign will be “One Small Change = A Totally Different Day.”

Our Campaign’s Impact on China’s Gen Z

- 99.4 M Gen Zs Reached
- 1.2 M Interactions
- 238 New Contents Created
- 80 Influencer Collaborations
Multi-Country Dissemination Plan

Launching the Initiative to Gen Z in India

In 2023, the INC broadened the horizons of its multi-country approach by moving into India with the campaign “Feel the Goodness of Nuts and Dried Fruit.” Thanks to their consumer power, Gen Z continued to be the focus of the activity, which saw us create a fully online campaign strategy under the three content pillars of Inspire and Guide, Educate, and Connect. The content pillars have homed in on key topics of interest for Gen Z such as sustainability and a healthy lifestyle while maintaining their traditional values, still of key importance to this generation in India, by celebrating important festivities and sharing how to incorporate nuts and dried fruit into them. As always, influencers have been an essential part of the strategy to help spread the message even further. The campaign has been a resounding success and has reached over 87.1 million members of Generation Z since its launch.

India Campaign Proposal for 2024

In 2024, the INC will penetrate the market with the campaign “It’s Time to Make a Switch.” Why this slogan? Generation Z in India are digital natives, always on the go and saturated with information. Therefore, “It’s Time to Make a Switch” means switching off and taking care of their health and well-being. Specifically, the switch will be made by adding nuts and dried fruits into their daily lives.
STATISTICS

New Online Database

This year, the INC unveiled its new online statistics database. Exclusive to INC members, it is the most comprehensive statistics database in the nut and dried fruit industry. With a sleek look and feel, the new database is faster, more intuitive, and features new data sets and dashboards.

The industry’s most comprehensive repository of statistical information

NEW DATASETS
- Planted area
- Productivity per hectare
- Trade value

NEW FEATURES
- In-shell and kernel equivalent data
- Data by GNI groups
- CAGR

REPORTS
- Production Analysis
- Trade Analysis
- Consumption Analysis
- Planted Area Analysis
- Supply & Consumption Data
- Imports & Exports Data

700,000+
STATISTICAL RECORDS
AT YOUR FINGERTIPS, INCLUDING:

500,000+
TRADE RECORDS

120,000+
CONSUMPTION RECORDS

74,000+
SUPPLY RECORDS

7,000+
PLANTED AREA AND PRODUCTIVITY RECORDS

COVERING THE ENTIRE NUT AND DRIED FRUIT WORLD

68
PRODUCING COUNTRIES

193
EXPORTING COUNTRIES

224
IMPORTING/CONSUMING COUNTRIES
The Statistical Yearbook is the go-to source for insightful analysis of production, trade and consumption trends over the last decade and up to the present day. The 2022/2023 edition begins with an overview of global production and consumption trends over the past decade and continues with 16 ad hoc chapters that take an in-depth look at each of the nuts and dried fruits under the umbrella of the INC.

**HIGHLIGHTS OF THE 2022/2023 STATISTICAL YEARBOOK**

**WORLD TREE NUT PRODUCTION (Metric Tons)**  
Kernel basis, except pistachios in-shell

**WORLD PEANUT PRODUCTION (Metric Tons)**  
In-shell basis

**WORLD DRIED FRUIT PRODUCTION (Metric Tons)**

### TREE NUTS
- **Production**: 5.3 M MT*
- **Exports**: 3.3 M MT**
- **Consumption**: 5.1 M MT*

### PEANUTS
- **Production**: 50.7 M MT*
- **Exports**: 2.5 M MT**
- **Consumption**: 51.3 M MT*

### DRIED FRUIT
- **Production**: 3.1 M MT
- **Exports**: 3.3 M MT
- **Consumption**: 3.3 M MT

### TOP PRODUCING COUNTRIES, FIVE-YEAR AVERAGE (2018/19–2022/23)

**Tree Nuts**
- USA
- TÜRKİYE
- CHINA
- CÔTE D’IVOIRE
- INDIA

**Peanuts**
- CHINA
- INDIA
- NIGERIA
- USA
- SENEGAL

**Dried Fruits**
- TÜRKİYE
- USA
- IRAN
- SAUDI ARABIA
- CHINA
The series is available at the INC website members’ area and features six separate maps:

- World Tree Nut Trade Flows (shelled)
- World Tree Nut Trade Flows (in-shell)
- Intra-European Tree Nut Trade Flows (shelled + in-shell converted to kernel equivalent)
- Peanut Trade Flows (shelled)
- World Dried Fruit Trade Flows
- Intra-European Dried Fruit Trade Flows

The six maps provide a visual representation of the main nut and dried fruit trade flows worldwide.

Exports totaled 14.4 M metric tons:

- 2.5 M MT Shelled Tree Nut Exports
- 6.1 M MT In-Shell Tree Nut Exports
- 3.1 M MT Shelled Peanut Exports
- 2.7 M MT Dried Fruit Exports

*Trade Flow Data 2022.
SCIENTIFIC & GOVERNMENT AFFAIRS

Staying Abreast of Key Issues Affecting the Sector

As the official voice of the global nut and dried fruit industry, the INC participates in the discussions of international and supranational institutions and proactively monitors key issues of interest to the sector.

SULFUR DIOXIDE AND SULFITES

The European Food Safety Agency’s ongoing re-evaluation of sulfur dioxide and sulfites was monitored closely. In addition to attending meetings with EU officials in January and June, and holding discussions with the Aegean Exporters’ Association, the INC sent a position letter and submitted comments to the European Commission and to UNECE, respectively.

IMPLIED NUTRIENT CONTENT CLAIM “HEALTHY”

The U.S. Food and Drug Administration (FDA) proposed a new rule to update the definition of the nutrient content claim “healthy” to be consistent with current nutrition science and Federal dietary guidance, especially the latest edition of the Dietary Guidelines for Americans, 2020-2025. In February, the INC submitted comments to the FDA pleading in favor of updating the definition. Nuts and seeds are some examples of foods currently ineligible to bear the “healthy” claim, but that would qualify under the proposed definition.

CODEX ALIMENTARIUS

In April, the INC participated in the 16th Session of the Codex Committee on Contaminants in Foods, and is taking part in the working group focused on establishing a maximum level for total aflatoxins in ready-to-eat peanuts. In June, the INC attended the 54th Session of the Codex Committee on Pesticide Residues (CCPR54), where new maximum residue limits (MRLs) were reviewed and discussed for various products and substances. The INC is also involved in the electronic working group on the review of the code of practice for the prevention and reduction of aflatoxin contamination in peanuts.

UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE (UNECE)

In June, the INC attended the annual meeting of the Specialized Section on Standardization of Dry and Dried Produce in Geneva, Switzerland. Member States reviewed the new standards for in-shell pecans and pecan kernels, the existing standards for cashew kernels, and raw and roasted peanut kernels, and the explanatory posters for the commercial quality of several nuts and dried fruits. In November, the INC participated in the 78th Session of the Working Party on Agricultural Quality Standards, which highlighted the significance of the standards in promoting global commerce and sustainable food systems.
REDUCING FOOD LOSS AND WASTE

In June, the INC was appointed to lead a UNECE working group that will produce guidelines on reducing food loss and waste in nuts and dried fruits. Although the level of loss and waste associated with nuts and dried fruits is low, it is essential to reduce it even further. According to UN estimates, food availability will need to increase by 60% in order to feed the global population in 2050. However, if food loss and waste are reduced by half, only a 28% increase in production will be required to meet this goal.

WAREN-VEREIN DER HAMBURGER BÖRSE

In November, the INC attended the 36th European Trade Meeting, organized by the Waren-Verein der Hamburger Börse e.V., in Hamburg, Germany. The meeting brought together around 100 participants representing companies and organizations in the nut and dried fruit sector across 13 different countries to discuss paths to sustainability in the industry.

TÜRKIYE-EU COOPERATION SCHEME ON HAZELNUTS

In December, the INC participated in the annual meeting of the Türkiye-EU Cooperation Scheme on Hazelnuts. Key topic discussed included adverse weather due to climate change, new pests, and the unavailability of effective plant protection products due to stringent EU regulations.

OFFICIAL CONTROLS

Throughout the second half of 2023, the INC attended key stakeholder meetings organized in response to concerns about recent cases of destruction of goods by import authorities in the EU, in particular Italy, France and Sweden.

KEY ISSUES:
- Sustainability
- Reducing food loss and waste
- Climate change
- New pests
- Plant protection products
- Destruction of goods by import control authorities

INC ACTIONS:
- INC-led working group on food loss and waste
- Trade meetings
- Key stakeholder meetings
In 2023, the key tariff-related developments monitored by the INC were as follows:

**INDIA**
Removal of retaliatory tariffs on US almonds and walnuts effective as of September 6.

<table>
<thead>
<tr>
<th>Product</th>
<th>Rate under retaliatory tariffs</th>
<th>New tariff rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walnuts, in-shell</td>
<td>120%</td>
<td>100%</td>
</tr>
<tr>
<td>Walnuts, shelled</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Almonds, in-shell</td>
<td>Rs. 42/kg</td>
<td>Rs. 35/kg</td>
</tr>
<tr>
<td>Almonds, shelled</td>
<td>Rs. 120/kg</td>
<td>Rs. 100/kg</td>
</tr>
</tbody>
</table>

**INDIA**
Reduction of tariffs on pecans announced on February 1.

<table>
<thead>
<tr>
<th>Product</th>
<th>Old tariff rate</th>
<th>New tariff rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pecans</td>
<td>100%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**TÜRKIYE**
Tariff increase on almonds and walnuts effective as of November 1. The new conditions apply to all sources except the United Arab Emirates.

<table>
<thead>
<tr>
<th>Product</th>
<th>Old tariff rate</th>
<th>New tariff rate</th>
<th>Old fixed duty (per metric ton)</th>
<th>New fixed duty (per metric ton)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walnuts, in-shell</td>
<td>4%</td>
<td>15%</td>
<td>US$307</td>
<td>US$416</td>
</tr>
<tr>
<td>Walnuts, shelled</td>
<td>4%</td>
<td>15%</td>
<td>US$573</td>
<td>US$1,099</td>
</tr>
<tr>
<td>Almonds, in-shell</td>
<td>2%</td>
<td>15%</td>
<td>US$452</td>
<td>US$580</td>
</tr>
<tr>
<td>Almonds, shelled</td>
<td>2%</td>
<td>15%</td>
<td>US$818</td>
<td>US$942</td>
</tr>
</tbody>
</table>

**US-EU**
An agreement was announced on December 19 to prolong the suspension of the Section 232 tariff dispute until March 31, 2025. The dispute dates back to 2018, when the US introduced tariffs on European steel and aluminum and the EU responded by introducing rebalancing tariffs on imports of certain American products—including peanut butter and processed cranberry products—into the EU.