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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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The nut and dried fruit industry faced a difficult year and did so with positiveness and proactive diligence. Promoting consumption and highlighting unprecedented opportunities across the supply chain is key to balancing supply and demand. This year, the INC continued to forge closer ties with the supply chain focusing on major manufacturers and retailers. INC continues to make industry aware of consistency in availability of product and of the confidence in which the food sector can invest.

The INC welcomed the news of India’s removal of retaliatory tariffs on US almonds and walnuts in September. This came on the heels of the INC’s visit to India in early July, when we met with the Minister of Commerce and Industry and also the Minister of Agriculture. The INC has been actively engaged in outreach in China, participating in several events, meeting with key industry players and sponsoring a symposium at the 14th Asian Congress of Nutrition. Building on the success of these visits, the INC will continue to expand its “Global Outreach Agenda” as further explained by INC Executive Director Mrs. Goretti Guasch in the following pages.

In early October, the INC Executive Committee met in Luxembourg, where it formally adopted the key INC Global Outreach Agenda referred to above, and the continuation and next rendition of the Multi-Country Dissemination program to LATAM. I am also pleased to advise that the INC will fund the NUTPOOL study, an initiative that emerged from the historic NUTS 2022 gathering of international researchers at INC headquarters late last year. NUTPOOL is a three-year study and a multi-country meta-analysis of over 1 million people. A first of its kind, NUTPOOL will look into and report the epidemiologic relation between nut consumption and the risk of a number of chronic diseases, providing a representative view of the worldwide population. NUTPOOL will be groundbreaking for the nut and dried fruit industry, providing extensive data that will support many types of health claims and further health research in many markets. All to assist to drive consumption.

This October saw another successful INC Pavilion at the largest-ever Anuga trade fair. The INC hosted 21 co-exhibitors from 15 countries and the Pavilion was visited by key players in the nut and dried fruit sector, making it the centre of industry activity at Anuga. The INC Pavilion Series provides a hub for members and industry participants at these events.

Planning is underway for our flagship event, the INC Congress to be held in the stunning location of Vancouver from May 8-10, 2024. In addition to some new and exciting updates to the congress program and social schedule, we will introduce an exciting new feature: Nutfruit Plaza, which will be the place to network, exhibit and create new business opportunities. Nutfruit Plaza combines exhibitors, meeting area, and coffee space at the same time.

Our industry is progressive and resilient. A significant factor for 2023 has been the significant exponential growth in the creation of relevant resources on the importance of sustainability. It has been an unprecedented rally of expertise and experience, and one that INC is proud to be a part of. A positive experience, our sustainability knowledge base facilitating great communication to the supply chain, consumers, and creating affirmative sustainable actions.

Thank you to the INC Board of Trustees and Executive Committee for their time and dedication to our causes. A special thank you to Goretti Guasch and her team in Reus for their continued great work and execution of our industry strategic plans.

I wish all members and readers a safe and healthy end of year. Let us hope that peace and compassion endure through the difficult times the world finds itself under. Take care, thank you for your support of INC and I look forward to seeing you all again soon.

Kind regards,

Michael G. G. Waring
WELCOME TO THE FUTURE

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Since launching less than two years ago, the INC’s Multi-Country Dissemination Plan has shared the benefits of eating nuts and dried fruits with millions of consumers across China and India. In parallel with these campaigns, members of the INC leadership have made multiple on-the-ground visits to meet with high-ranking officials in both countries to discuss the future of the sector and make the INC’s stance on free trade heard. This combination—consumer-facing dissemination plus high-level country-specific outreach—is a winning formula that has enabled us to set the global industry agenda for nut and dried fruit promotion. Hence the recent decision by the INC Executive Committee to take these efforts to the next level through an ambitious new initiative called “Country Outreach: Global Program for a Better World.”

This project envisages a concrete set of actions including fostering collaboration with governmental bodies, international organizations and major manufacturers and retailers, all with the ultimate goal of boosting consumption of nuts and dried fruits. A specific delegation has been created with Chairman Michael Waring, Vice-Chairman Ashok Krishen, founding member and Chairman of the Sustainability, Scientific and Government Affairs Committee Pino Calcagni, and myself to carry out the actions. The activity will also burnish the INC’s global reputation as the key entity spearheading the sustainable growth of the industry.

At each stop along the way, we will promote the myriad health benefits of nuts and dried fruits and encourage higher daily intake of these products as has been seen in China with the recommendation of the daily allowance being doubled as recently published by the Chinese Nutrition Society. To bolster our case, we are planning to conduct an economic modeling study in specific regions showing how much money countries could save on healthcare costs if they were to substantially increase consumption of nuts and dried fruits. By way of example, a recent study commissioned by Australian organization Nuts for Life found that widespread consumption of a daily handful of nuts could save Australia AUS$980 million each year.

Each of the ministries and organizations we visit will be invited to sign the INC World Declaration on Nuts and Dried Fruit, an industry manifesto affirming that greater consumption of nuts and dried fruits will lead to a better world, particularly in the areas of climate and sustainability, and global health.

In parallel with this on-the-ground outreach, the INC’s Multi-Country Dissemination Plan will continue to expand. Our promotional campaigns will be coordinated with our country-specific outreach efforts, to ensure maximum penetration in each of the chosen markets. In addition to continuing our campaigns in China and India, we will soon be penetrating Latin America, which boasts a population of over 700 million people. The campaign in this region will initially focus on Brazil, Mexico, Chile and Argentina, countries with high growth potential for nuts and dried fruits. Across all targeted countries, the INC plans to invest more than €1.5 million in activities that promote nut and dried fruit consumption in 2024 alone.

In order to spread our message of healthy goodness even further, I invite industry stakeholders and INC members to get in touch to collaborate with us in our Multi-Country Dissemination Plan to help us reach every corner of the globe and ensure that our messages are aligned towards the ultimate goal of boosting global consumption.
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**Ferrero to Open Second Hazelnut Plant in Chile in 2024**

Ferrero is consolidating its long-term commitment to Chile by investing US$75 million to build a second hazelnut processing plant in the country, according to the Chilean business newspaper *Diario Financiero*. With this new plant, Ferrero brings its total investment in Chile to US$330 million. In addition to operating more than 4,000 hectares of hazelnut plantations, the Ferrero subsidiary AgriChile also has an industrial division that supports the international production of brands such as Nutella and Kinder Bueno. The second hazelnut processing plant is being built in San Gregorio, Ñuble Region, and is expected to open in 2024.

**Importaco and Dcoop Sign Strategic Alliance for Marketing of Mediterranean Almonds**

Dcoop and Importaco Nuts have signed an agreement to promote the consumption of Mediterranean almonds in the distribution, hospitality and ingredients markets globally with the aim of becoming the main players in the marketing of Mediterranean almonds. The agreement was signed in September at Dcoop’s facilities in southern Spain by Dcoop President Antonio Luque and Importaco President Toño Pons. Dcoop’s almond division will continue to develop its commercial activity in the sale of calibrated and selected almonds in national and export markets, focusing on Europe, China and the Middle East. Importaco Nuts will be the strategic and exclusive partner of this division in the marketing of value-added products. The goal envisaged in this agreement is to sell more than 12,000 metric tons of shelled almonds in 2028.

**Climate Asset Management Completes 1,800-Hectare Macadamia Project Acquisition in Queensland**

Climate Asset Management, a specialist asset management firm exclusively dedicated to natural capital, has announced completion of the acquisition of 1,800 hectares of farmland in Queensland, Australia. The acquisition was financed by Climate Asset Management’s Natural Capital Fund. It is the third large-scale land-transformation project acquired by the Natural Capital Fund and the first in Australia. This regenerative agriculture project will see the transformation of high-intensity mono-cultured sugarcane cropland transformed regeneratively into a sustainably managed, native and high-value macadamia orchard, cultivated and harvested using regenerative practices and adopting a holistic land management approach. Around 10% of the land involved in this project will be allocated for the restoration of native habitat, the reintroduction of endangered native plants and the establishment of a wildlife corridor between two national parks.

**Almond Board of California Directors Taps Clarice Turner as New CEO**

The Almond Board of California (ABC) Board of Directors selected Clarice Turner, an experienced global leader in consumer goods, food service and wine and spirits, as the next president and CEO. Turner most recently served as president of the iconic Napa Valley winery Joseph Phelps Vineyards. She has also held CEO and senior executive positions at Boudin Bakery, Starbucks Coffee Company, YUM! Brands, Papa Murphy’s International and PepsiCo. In September, Turner began working closely with the board, outgoing President and CEO Richard Waycott and the ABC executive team to ensure a smooth transition. Waycott informed the board of directors in November 2022 that he planned to step away from his ABC responsibilities at the end of 2023 to pursue other interests.
Blue Diamond Growers Hosts US Trade Representative at Sacramento Processing Plant

Blue Diamond Growers hosted United States Trade Representative Katherine Tai for a tour and roundtable discussion at its Sacramento headquarters and processing facility in September. Ambassador Tai toured the historic, 60-acre manufacturing facility with Blue Diamond executives Alicia Rockwell, Mel Machado and Raj Joshi. The group viewed the almond receiving, storage, processing and shipping areas, seeing firsthand how almonds are prepared for export to the industry’s largest markets: India, China and the Middle East. The officials learned about the ongoing almond harvest, Blue Diamond’s sustainability practices, the challenging conditions surrounding the 2023 crop and high grower production costs.

Ambassador Tai concluded her visit with an industry roundtable discussion. The Ambassador listened to industry representatives express the importance of protecting the premium on California agriculture in export markets given the advanced environmental, labor and regulatory practices expected of California growers. Attendees included representatives from the Agricultural Council of California, Almond Board of California, American Pistachio Growers and Blue Diamond Growers.

ofi Secures US$1.75 Billion Sustainability-Linked Loan

Olam Group Limited announced on August 31, 2023, that its wholly owned subsidiary, olam food ingredients (ofi), has secured a multi-tranche sustainability-linked facility aggregating US$1.75 billion. The facility has Olam Treasury Pte Ltd as a borrower and is initially guaranteed by Olam Group Limited, which will transfer to ofi following the planned IPO and demerger of ofi. The facility comprises a two-year and three-year revolving credit facility and a three-year term loan. Proceeds will be applied towards refinancing of ofi’s existing loans and general corporate purposes. The interest margin on the facility is linked to the achievement of certain sustainability targets and could be reduced if those targets are met. A total of 19 banks from Australia, Canada, China, Europe, Japan, Middle East, Singapore and the United States participated in the facility, with HSBC being appointed as the facility agent.

“Nineteen banks from eight countries participated in the facility.”

Korean Investors Seek to Launch Cashew Processing Plant in Cambodia

Investors from South Korea intend to establish a cashew processing plant in Cambodia to promote added value and boost exports. According to the Cambodian Ministry of Information, plans were discussed in Phnom Penh on August 3 between Reach Ra, Secretary of State of the Cambodian Ministry of Commerce, and a delegation from the Korea Rural Economic Institute and the Korea Oversea Agro-Resources Association, led by project manager Dr. Heo Jang. The investors intend to pursue the possibility of setting up a plant through the official development project of the South Korean government in order to increase the added value of Cambodia’s cashews for export to the world market. As Reach Ra noted during the meeting, the export of cashews from Cambodia to South Korea is tariff-free under the free trade agreement between the two countries, which came into force in late 2022.

“The project will increase the value of Cambodia’s cashews for export to the world market.”
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FROM FIELD TO FACTORY
How did your early experiences in India shape your approach as a chef?
From the first time I stepped into my father’s kitchen, it was the beginning of a long quest for passion and knowledge of food. I remember being fascinated by the smell and aromas which used to come from the kitchen — it was my first love.
I was inspired by the way my father used to work in the restaurant in India. It was admirable to see that with all the hard work and effort put in by my father and his staff, they all still managed to enjoy themselves and laughter always filled the kitchen.

How would you describe your cooking style?
What types of cuisine inspire you?
My cooking is very much inspired and guided by traditional, classical techniques and recipes. However, my international exposure and experience helps me to experiment, enhance and push boundaries. I am inspired by many cuisines, including French, Japanese, Thai, South American, etc.

What prompted you to relocate to London and open Quilon?
We started Karavalli 23 years back and I was part of the team that implemented the project. London had its first upmarket Indian restaurant: the Bombay Brasserie. Once this succeeded, a lot of restaurants in the same style opened up. We just thought it was time to showcase different cuisine styles of India and the obvious one was to do a South Indian restaurant, more so after the success of Karavalli in Bangalore.
London has the most adventurous guests in the world. Hence everybody is open to trying new cuisines. With the world being so well connected and travel becoming so frequent and easy, the guests also have a fair exposure to and knowledge of different cuisines. If there is anything new to be tried in the world of cuisine, London is the place.

How do you strike a balance between traditional South Indian cuisine and what you call progressive cooking?
The Quilon menu has broadly two approaches that we follow. One, we have dishes that are classical dishes from the region. The only thing that we tweak is the spice level. We try and keep it slightly lower than in India, just to make it acceptable to the international guests we attract. The second approach is what I call progressive cooking. We create dishes in our kitchens that have all the ingredients from the south of India but may use a perishable ingredient from a local source (like asparagus, black cod, scallops, etc.). Thus, the dish that we create very much complements the region we represent and also complements the classical dishes we do. We import ingredients that are not locally available to ensure we are as good as back home. The only difference is that the spice level is slightly lower.
How would you describe the dining experience that you aim to provide?

Britain, especially London, is a melting pot of cultures. We get guests from all over the world, and once someone lives in London for over a year, he or she becomes very adventurous and discerning. As long as you give them a great experience in terms of food, service and cuisine, they are the easiest guests in the world to deal with.

In your opinion, how can nuts and dried fruits improve a dish?

Nuts and dried fruits can enhance the creaminess, natural sweetness, textures and flavors, and complement dishes. They can bring nutty flavor and add a crunchy or chewy texture to a dish. They can also enhance the color of the dish. The ability to use nuts and dried fruits in their whole form or in different sizes and textures, including in a fine form, helps to create a multi-sensory experience.

What’s next for Chef Sriram Aylur?

London is the gourmet capital of the world, along with New York. It would take a lifetime to experience all cuisines and the different interpretations of these cuisines in a city like London. This brings the challenge of discerning guests with fierce competition. The finest chefs from all over the world come to London to enjoy a part of this action. Thus, we have to evolve our product and experiment all the time. I love the food business. I love this interaction that we have on a professional level and the challenges this brings along. It is a business that makes you think on your feet and be creative all the time—this keeps me going.

QUICK-FIRE ROUND!

What do you enjoy the most about being a chef?

I have been privileged and honored to meet some of the most important people in business, politics, music, sports, acting, CEOs and business leaders. Some of this interaction is very inspiring and thought-provoking. It at times makes one’s thinking change. Some of them become good friends, philosophers and guides.

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

Pistachio cake. The use of cashew in savory dishes, especially tender cashew. Almond powder to make a beautiful halwa. Dried fruit barfi. Pecan nut and caramel ice cream. Roasted peanut butter as a spread. The list could go on—I am drooling at the thought!

What is the next big gastronomical trend?

Cooking will be more about sourcing classic ethnic cooking techniques. Traditional cooking, especially, will be appreciated more than ever before. The health benefits of ingredients will be better understood, thus better used. For example, the benefits of dried fruits and nuts are not understood fully; this will be better understood and used.

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

We have a large variety of dried fruits and nuts. We are all great fans of them. We always have roasted peanuts, almonds, pecan nuts, cashews, prunes, raisins, walnuts, pistachios and Brazil nuts.

Lemon Rice

Ingredients:

- 4 cups long-grain cooked rice (basmati)
- 20 lemons
- 2 tbsp mustard seeds
- 1 ½ tbsp turmeric powder
- 4 tsp chana dal (Bengal gram)
- 10 whole red chilies
- 4 sprigs curry leaves
- 2 tsp urad dal
- 25 g cashews
- 150 ml refined oil
- Salt to taste

Method:

Boil basmati rice and set aside. Extract juice from the lemons. Heat oil and crackle mustard seeds. Add urad dal, whole red chilies, turmeric powder, chana dal, cashews, curry leaves and sauté for 2 minutes. Add lemon juice and salt to taste. Simmer for 5 minutes. Remove from the fire and cool. Pour this mixture over the cooked rice and mix. Adjust the seasoning and serve hot.
Country/Product Spotlight

Cashews & West Africa

Industry Highlight
An overview of production, processing and trade

Nuts for Cashew: Achieving Sustainable Production in West Africa
Dr. Filipa Monteiro on strategies to achieve sustainable cashew production in the region

Health Benefits of Cashews
Learn about the nutritional qualities of cashews

New Product Launches
Insights into new products that utilize cashews

This Country/Product Spotlight is the 12th in a series of industry and market overviews in Nutfruit magazine. This report provides a snapshot of the cashew industry in West Africa, with data, analysis and trends.
Global Statistical Review
Crop Forecast Update

November 2023

Map shows 5 top producing countries. Other major producers listed below.

Main Producing Countries

Almonds
Brazil Nuts
Cashews
Hazelnuts
Macadamias
Pecans
Pine Nuts
Pistachios

Walnuts
Peanuts
Dates
Dried Apricots
Dried Cranberries
Dried Figs
Prunes
Raisins Sultanas Currants

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