

# ANNUAL REPORT

## 2025

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**Mr. Ashok Krishen**  
Chairman

## LETTER FROM THE CHAIRMAN

Dear Friends,

Since assuming the role of INC Chairman in May 2025, I have been struck by both the resilience and dynamism of the global nut and dried fruit industry. Our sector combines remarkable growth potential with complex challenges—and the INC plays a pivotal role in supporting members, promoting consumption, and guiding the industry toward a sustainable future.

The nut and dried fruit industry operates on a truly global scale. Supply chains connect growers, processors, traders, and consumers across continents, and success depends on predictable, fair, and open trade. Yet 2025 underscored the continuing challenges posed by tariffs and trade barriers, which can disrupt flows, create market imbalances, and limit the availability of our products to consumers. Ensuring market access and fair trading conditions remains essential to sustaining the long-term health and growth of our industry.

In late 2025 the Executive Committee held its Strategic Planning Meeting that set the direction of the INC for the years ahead. Three areas stood out as central to advancing the industry: accelerating **global consumption** of nuts and dried fruits, championing the **health benefits** through

supporting continued research, and being a pioneer and leader in **sustainability** within the food and agricultural sector.

Global demographics present a tremendous growth opportunity for our industry. With around 800 million Gen Z consumers worldwide, even modest increases in daily nut and dried fruit intake could translate into extraordinary demand. Inspiring younger generations to incorporate our products into daily diets is essential. Achieving this requires a coordinated effort to showcase the taste, versatility, and health benefits of nuts and dried fruits, while also highlighting their alignment with modern consumers' values. The INC accomplishes this through its Multi-Country Dissemination Plan which is currently running in China, India and Latin America.

As global demand for healthy, natural foods continues to rise, nuts and dried fruits are increasingly recognized for their nutritional value. The NUTS 2025 conference, held in October at INC headquarters, brought together leading nutrition researchers to review the latest evidence on the role of nuts and dried fruits in health. By supporting initiatives like these, the INC continues to strengthen the scientific foundation for health claims and promote global recognition of nut consumption as a key component of public health.

Sustainability is not merely a priority—it is a responsibility. It is no longer just “nice to have”; it is the right thing to do. With the launch of the INC Sustainability Institute, and with it, the INC Sustainability Certification, the INC has positioned itself as a sustainability pioneer and provides members with tangible ways to differentiate themselves in the market, while setting a global benchmark for responsible industry practices.

The fundamentals of the nut and dried fruit industry remain strong. Growth has consistently outpaced global GDP and agricultural demand, reflecting both the appeal of our products and the sector's entrepreneurial strength. With the INC as our platform for knowledge, connection, and action—and guided by our new strategic roadmap—I am confident that the coming years will be among the most productive and transformative in the history of our industry.

**Ashok Krishen**  
INC Chairman





**Mrs. Goretti Guasch**  
INC Executive Director

## 2025: A YEAR OF PROGRESS AND PURPOSE

I am proud to reflect on the milestones we achieved together in 2025 and the opportunities that lie ahead. The year was marked by resilience, innovation, and collaboration—qualities that continue to define the global nut and dried fruit industry.

Despite economic uncertainties and evolving trade dynamics, our sector demonstrated remarkable adaptability. These achievements reinforced the INC's role as a trusted leader and advocate for sustainable growth. In the latter part of the year, we also embarked on a new chapter with the launch of our renewed Strategic Plan, including an updated mission statement and a strengthened member value proposition, along with clearly defined strategic priorities for the years ahead. These developments are outlined in more detail on page 6 of this Annual Report.

### CELEBRATING KEY GLOBAL ACHIEVEMENTS

One of the highlights of the year was the exclusive **INC Congress in Mallorca**—the largest in our history, with 1,532 participants from 72 countries. As the only truly global platform for the nut and dried fruit industry to do business, the INC Congress reaffirmed its prestige as the international platform for networking, knowledge exchange, and strategic alignment, ensuring that our industry remains globally united in addressing challenges and seizing opportunities. Other major INC events and activities, such as the **INC Pavilion** in Gulfood and Anuga Cologne, our **On-site Technical Visit** to Spain and Portugal, and the **INC Academia**, also hit key milestones reaching their biggest participation to date.

Increasing global consumption is and will remain a cornerstone of our strategy. In 2025, we advanced our

**Multi-Country Dissemination Campaign** in China, India, and Latin America, leveraging digital engagement, influencer partnerships, and culturally relevant messaging resonating strongly with the younger demographic—Gen Z, who will remain a dominant consumer group through 2030. Since this initiative launched in 2022 the INC has invested nearly €3 million in the project. Looking ahead, the INC will continue with significant investments, preparing to expand the project into Southeast Asia—a region of strategic importance—over the course of 2026, while exploring future outreach in the MENA region and Eastern Europe. The **Nutfruit Recipe Program** launched in 2017 also added multiple new innovations with specific recipes created in each individual market. In 2025 alone, the initiative reached 15 million people.

Health and nutrition research aimed at securing a health claim for nuts, and updating dietary guidelines remains a central pillar of our work. The groundbreaking INC-funded **NUTPOOL** project is progressing well. This meta-analysis of 1 million participants is generating robust scientific evidence on a global scale to support a health claim for nuts. In parallel, we are pursuing a landmark **clinical trial** on diabetes which will further strengthen our approach to update dietary guidelines across the globe to promote daily nut consumption, ensuring our products remain integral to healthy, balanced diets worldwide.

A significant milestone for 2025 was the inauguration of the **INC Sustainability Institute**, advancing meaningful initiatives to help our sector lead responsibly. At the core of this work is the pioneering **INC Sustainability Certification**—the first of its kind in our industry. This transparent, data-driven scoring system, covering environmental, social, and governance (ESG) dimensions, helps businesses prioritize sustainability actions and align with best practices. INC members now have the

opportunity to be the first to achieve certification, with several standards already available and more to be announced soon. This initiative empowers companies to improve their performance and positions the nut and dried fruit sector as a global benchmark for sustainable practices.

Trade challenges, particularly the impact of tariffs, remained a pressing concern throughout the year. The INC responded decisively by drafting comprehensive **position statements** and submitting letters to key regulatory bodies, including the European Commission, to oppose additional duties on nuts and dried fruit. These efforts reflect our unwavering commitment to free and fair trade, ensuring that the industry's voice is heard and its interests are protected on the global stage. Throughout the year, we also kept members informed on a weekly basis through our **tariff updates and timeline**.

Providing our members with statistical data remains an integral part of our daily global strategy. The **INC statistical database** now holds nearly 1 million records for our members to consult. In 2025 we also published our highly anticipated **world trade flow map series**, as well as our **annual global statistical review**, some of the most sought-after publications, along with **Nutfruit magazine**.

As we look ahead to 2026 and beyond, our focus is clear and inspiring: to drive consumption growth, champion health, and lead sustainability. I extend my sincere gratitude firstly to my team at the INC Headquarters for their professionalism and continued commitment, and to all INC members for your sustained support and collaboration. Together, we will shape an even stronger, more resilient, and sustainable future for our sector worldwide.





# WHO WE ARE

## WHO WE ARE

# OUR MISSION, MEMBER VALUE PROPOSITION & STRATEGIC GOALS

In October 2025, the INC Executive Committee came together with a clear purpose: to define the strategic direction that will guide the INC in the years ahead. Through focused discussions, the Committee aligned on a refreshed Mission, a strengthened Member Value Proposition, and a set of Strategic Goals that will shape our work from 2026 to 2030. Together, these elements form a coherent roadmap for sustainable growth, global leadership, and long-term value creation for the nut and dried fruit sector.

## Mission & Member Value Proposition

### Mission

*To drive sustainable and innovative growth in the consumption and supply of nuts and dried fruit worldwide by promoting their health benefits and natural goodness.*

### Member Value Proposition

*INC drives the sustainable growth of the global nut and dried fruit industry, creating long-term value for growers, businesses and consumers worldwide by:*

**Advocating for increased consumption and free market access**

**Pioneering and advancing sustainable practices**

**Leading the initiative to obtain a health claim for nuts and update dietary guidelines**

## Strategic Goals

### Goal 1. Increase Global Consumption and Market Access

**Purpose:** Drive global consumption & increase market access to maintain a healthy balance between supply and demand by engaging consumers in key regions and advocating for free trade.

### Goal 2. Obtain a Health Claim and Update Dietary Guidelines

**Purpose:** To strengthen our claim on the health benefits of nuts and dried fruit, through pursuing the development of an INC health claim for nuts and advocate for updates to dietary guidelines.

### Goal 3. Pioneer and Advance Sustainable Practices

**Purpose:** Position INC as the global leader in pioneering and advancing sustainable practices across the nut and dried fruit industry through the INC Sustainability Institute and the Certification.

## WHO WE ARE

# INC LEADERSHIP

### Board of Trustees:

The Board of Trustees comprises industry leaders who provide strategic leadership, governance, and advocacy to help the INC facilitate the sustainable growth of the nut and dried fruit industry.

- **Ashok Krishen, ofi, Singapore – INC Chairman**
- Bill Carriere, Carriere Family Farms, USA – INC 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy – INC Co-founder and 2nd Vice Chairman
- Riccardo Calcagni, Besana Group, Italy
- Jose Eduardo Camargo, QueenNut Macadamia, Brazil
- Christina Chen, Qiaqia Food Co. Ltd, China
- Mia Cohen, Setton Pistachio of Terra Bella, Inc., USA
- Roby Danon, Voicevale Ltd, 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 Kay, 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 Meltzer, Balcop Ltd., Canada
- Russell Mooney, Intersnack Procurement B.V., Netherlands
- Pratap Nair, Vijayalaxmi Cashew Company, India
- Guillaume Pagy, Pamuk Gida Yerli ÜR. TIC. (PAGYSA), Türkiye
- Varee Phonphaisan, Heritage Snacks and Food Co., Ltd., Thailand
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN) – INC Co-founder and Honorary President
- Antonio Pont Jr., Crisolar Nuts, SL, Spain
- Vincent Rieckmann, August Töpfer & Co. (ATCO Group) KG, Germany
- Hasan Sabir, Sabirlar Findik Ihracat Ltd. Sti., Türkiye
- Dirk Schmidt, Bösch Boden Spies GmbH and Co Kg, Germany
- Stephen Van Duyn, Blue Diamond Growers, USA
- Michael Waring, MWT Foods, Australia

### Executive Committee:

The INC Executive Committee drives key strategic decisions, sets goals, and monitors performance to ensure alignment with the INC's mission, while addressing challenges and overseeing decision-making.

- **Ashok Krishen, ofi, Singapore – INC Chairman**
- Bill Carriere, Carriere Family Farms, USA – INC 1st Vice Chairman
- Pino Calcagni, Besana Group, Italy – INC Co-founder and 2nd Vice Chairman
- Christina Chen, Qiaqia Food Co. Ltd, China
- Giles Hacking, CG Hacking & Sons Limited, UK
- Mike Hohmann, The Wonderful Company, USA
- Jack Mariani, Mariani Nut Company, USA
- Pratap Nair, Vijayalaxmi Cashew Company, India
- Antonio Pont, Borges Agricultural & Industrial Nuts (BAIN), Spain – INC Co-founder and Honorary President
- Michael Waring, MWT Foods, Australia
- Gorette Guasch, INC Secretary General and Executive Director

## WHO WE ARE

# SUBCOMMITTEES

The INC organization is guided by its leadership and specialized subcommittees which shape and support the strategic direction of the organization in alignment with its mission and vision. These subcommittees are grouped into two core strategic pillars:

### GOVERNANCE & OUTREACH

#### Audit

Ensures financial transparency and strategic alignment through annual external audits and quarterly reviews.

#### Business Integrity

Promotes adherence to INC codes and ethical standards, fostering a culture of integrity across all business practices.

#### Scientific & Government Affairs

Provides expert guidance on a broad range of scientific and regulatory affairs, with a particular focus on trade barriers, to support the global industry.

#### Sustainability Institute

Advises on sustainability initiatives and guides the development of impactful programs that benefit the sector.

### VALUE CONTENT & DISSEMINATION

#### Academic

Provides strategic oversight to ensure the continued success and relevance of the INC Academia's educational programs.

#### Ambassadors

Drives member engagement, promotes INC events, attracts new members, and shares market insights from their respective countries.

#### Congress

Supports the delivery of a high-impact annual Congress that shapes the future agenda of the industry.

#### Statistics

Collects and analyzes key industry data, including crop forecasts, trade flows, and consumption trends.

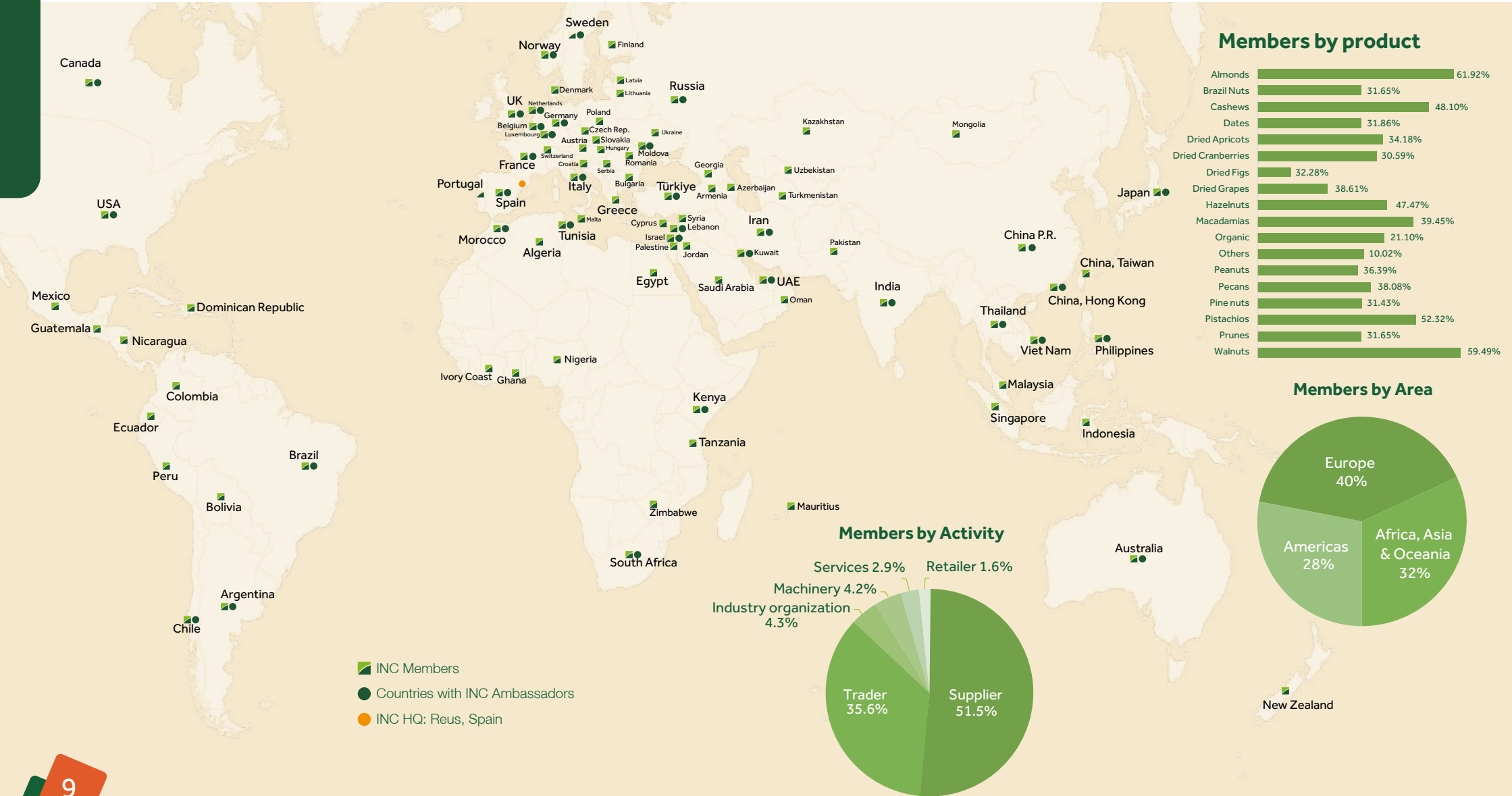
#### World Forum for Nutrition Research & Dissemination

Sets strategic priorities for nutrition research, oversees INC-funded grants, and advises on health claims and dietary guideline advocacy.

## WHO WE ARE

# OUR GLOBAL REACH

Today INC membership stands at over 950 companies from 85 countries across the entire supply chain.



## WHO WE ARE MEMBERSHIP BENEFITS

Being a part of the INC means joining a global community united by a shared purpose: supporting the sustainable growth of the nut and dried fruit industry.

## Unlock the Benefits of Membership



### CONNECTING BUSINESS LEADERS

Contact with over 950 business leaders from more than 95 countries.



### EXCLUSIVE WORLD NUT AND DRIED FRUIT CONGRESS

Discounts and sponsorship opportunities at the World Nut and Dried Fruit Congress.



### EXHIBIT AT INC PAVILION

Exhibit at top fairs and get your brand in front of thousands.



### ADVERTISING OPPORTUNITIES

Advertise to a niche audience in INC publications.



### SUSTAINABILITY CERTIFICATION

Position your company as a sustainability leader in the supply chain.



### TOP EDUCATIONAL PROGRAM

Special prices for the INC Academia educational program—the best in the industry.



### RENOWNED STATISTICS DATABASE

Access to over 910,000 industry statistics—the industry's comprehensive repository of statistical information.



### SCIENTIFIC STUDIES AT YOUR FINGERTIPS

Access to scientific and legal studies databases with over 5,300 studies.



### STREAMLINE THE CONTRACTING PROCESS

Access the certified short form contract.

## Beyond Membership: Driving Industry Growth

Beyond the direct benefits of membership, the INC actively supports industry growth through high-impact initiatives aimed at increasing global consumption and helping balance supply and demand. Here's how we're making a difference:

- **DRIVING CONSUMPTION:** The INC has invested €7 million in research and promotional campaigns to encourage nut and dried fruit consumption in key markets and advocate for free trade with governmental organizations and corporations.
- **CHAMPIONING SUSTAINABILITY:** Guided by the INC Manifesto and the United Nations Sustainable Development Goals, we are advancing meaningful progress toward a more sustainable future for the sector.
- **ADVANCING MARKET ACCESS:** We track global regulations and standards and engage with public authorities to safeguard industry interests and facilitate access to new markets.
- **DELIVERING DATA INSIGHTS:** Our internationally recognized statistics offer in-depth analysis of production, processing, trade, and consumption trends, supporting informed decision-making across the industry.
- **SHAPING THE FUTURE:** By bringing together leading researchers and setting shared priorities, we are working toward securing a health claim to help promote nut and dried fruit consumption worldwide.



The background is a dark orange gradient with a repeating pattern of various nut outlines in a lighter shade. A large white trapezoidal shape is positioned on the right side, containing the text. At the bottom right, there are three overlapping geometric shapes: a dark green rectangle, a blue rectangle, and a small orange rectangle.

# WHAT WE DO

## WHAT WE DO

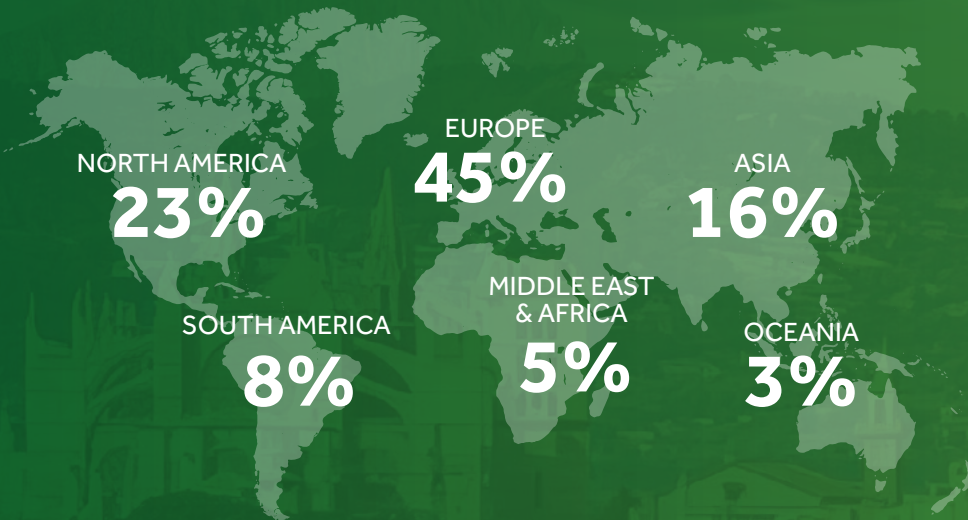
# INC CONGRESS MALLORCA 2025

From May 8-10, 2025, the 42nd INC World Nut & Dried Fruit Congress took place in Palma de Mallorca, Spain. Setting a new record for attendance, more than 1,500 company owners, presidents and CEOs from world-renowned companies came together for three days of networking, doing business and discussing the future of the industry.



## Mallorca in Numbers

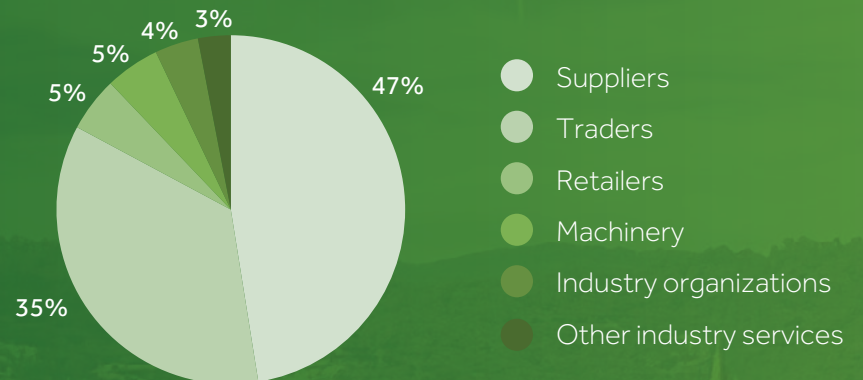
### VISITORS BY REGION



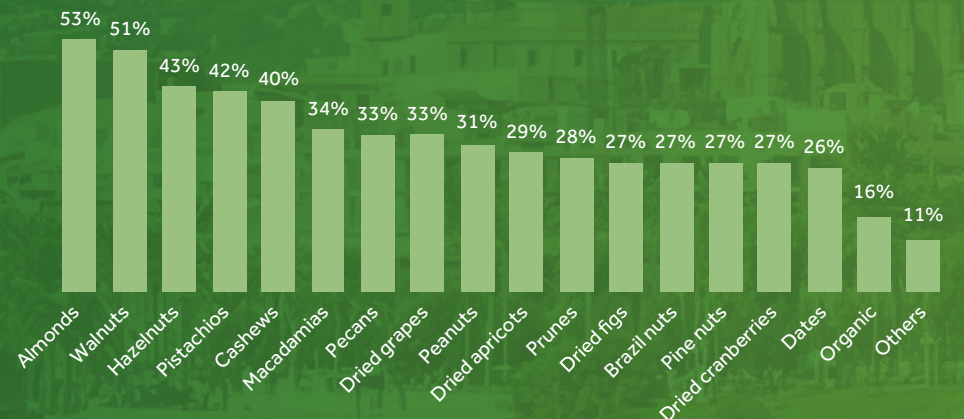
### PARTICIPANTS



### COMPANIES BY ACTIVITY



### COMPANIES BY PRODUCT



## WHAT WE DO

# INC CONGRESS MALLORCA 2025

Each year, the INC Awards celebrate outstanding contributions to the nut and dried fruit industry. This year's winners were honored during the INC Congress in Mallorca.



### Golden Nut Award Mercadona, Spain

The industry's highest honor went to Mercadona. Spain's leading supermarket chain works closely with suppliers to provide an efficient product selection tailored to customers' needs, while also contributing to society's sustainable development. The company's Total Quality Model places the customer at the center of all decisions.



### Excellence in Research Award Dr. David J. Baer, U.S. Department of Agriculture, USA

Dr. Baer and colleagues developed a method that for the first time allowed scientists to measure the energy content of an individual food while it is fed as part of a typical mixed dietary pattern. With this method, they found that nuts contain fewer calories than previously thought.



### Excellence in Gastronomy Award Disfrutar, Spain

The Barcelona restaurant Disfrutar, founded by chefs Oriol Castro, Eduard Xatruch, and Mateu Casañas, was named the Best Restaurant in the World by The World's 50 Best Restaurants in 2024. The culinary trio is known for their pursuit of new techniques that challenge the status quo of modern gastronomy.



### Excellence in Sustainability Award – Back to the Planet QiaQia Food, China

Under the umbrella of its Green Oasis sustainable development project, QiaQia Food advances sustainability across the product life cycle through three focused initiatives: sustainable nut farming, desert cultivation, and renewable energy adoption. Other areas of focus include reducing water consumption, limiting chemical fertilizer use, and improving agricultural waste management.



### Excellence in Sustainability Award – Back to the People Aegean Dried Fruits Exporters' Association, Türkiye

Combining rigorous food safety measures with an innovative, environmentally responsible approach to waste management, this nationwide initiative is dedicated to systematically detecting, collecting, and sustainably disposing of aflatoxin-contaminated dried figs, establishing a comprehensive framework for contamination prevention and control.



### Innovation Award Cimbria, Italy

Rather than relying solely on visible spectrum RGB cameras, the SEA.XL optical sorter incorporates specialized infrared imaging technology. This allows the machine to detect millions of colors and the unique chemical signatures and material properties of different nut and dried fruit varieties.



## WHAT WE DO

# INC CONGRESS MALLORCA 2025

## Keynote



**Toni Nadal**  
Tennis Coach and  
Ambassador of Rafa  
Nadal Academy, Spain

Toni Nadal's keynote blended humor with hard-won wisdom, emphasizing that success stems not from winning but from constant improvement, honesty, and personal responsibility. He described how facing reality—rather than making excuses—was central to shaping the mindset and character of his nephew, tennis legend Rafa Nadal.

He highlighted "final talent," the combination of natural ability and relentless work, as the true driver of greatness. With playful nods to Rafa's habit of eating nuts and dried fruits on court, Toni underscored his core message: keep things simple, focus on effort, and build on a strong foundation.

## Nutrition Research Seminar



**Dr. Sangeetha Shyam**  
Miguel Servet Investigator,  
Pere Virgili Health Research  
Institute, Spain

Chaired by Prof. Jordi Salas-Salvadó, the Nutrition Research Seminar featured a fascinating lecture by guest speaker Dr. Sangeetha Shyam.

In her talk, Dr. Shyam focused on the role of nuts in improving diet quality and health across Asia. She highlighted Asia's ongoing nutrition transition, where undernutrition, obesity, and poor diet quality coexist. Focusing on Malaysia in particular, Dr. Shyam described a shift from traditional diets toward highly processed, Westernized eating patterns. She called for expanded regional research to strengthen the evidence base and unlock the potential of nuts as a simple, accessible tool to improve health outcomes in one of the world's most dynamic and nutritionally diverse regions.

## Contracts and Consequences



**Giles Hacking**  
Chair of the INC  
Business Integrity  
Committee, UK

**Jonathan  
Cockerill**  
Senior Associate,  
Clyde & Co LLP, UK

**Jeanette  
Gonnermann**  
Managing Director,  
Waren-Verein der  
Hamburger Börse  
e.V., Germany

**Kees Blokland**  
Board Member, NZV,  
The Netherlands

**Brendan  
O'Donnell**  
President and CEO,  
Safe Food Alliance,  
USA

Chaired by Giles Hacking, this session explored how well-crafted contracts can protect businesses when deals go wrong. From contract formation to arbitration, panelists explored essential legal tools that can help buyers and sellers in the nut and dried fruit industry. Speakers stressed that agreements must be drafted meticulously, as even informal messages can create binding obligations. Clearly defined terms and strong default and force majeure clauses are essential to reducing uncertainty when disputes arise. The panel's message was clear: contracts should never be an afterthought.

## WHAT WE DO

# INC PAVILIONS

In 2025, the INC participated in Gulfood Dubai and Anuga Cologne, showcasing the INC Pavilion at both events. At each exhibition, the pavilions were strategically positioned in high-visibility locations to maximize engagement and networking opportunities. The INC Pavilion provides co-exhibitors with a valuable platform to expand their business into new markets, strengthen commercial relationships, and connect with key industry leaders under the INC umbrella. With the INC's Networking Receptions providing a dynamic setting for in-person engagement, the INC Pavilion continues to serve as a central hub for professionals across the global nut and dried fruit sector.

## Gulfood Dubai February 17-21, 2025

### INC Pavilion in Numbers



### INC Networking Reception at Gulfood



## Anuga Cologne October 4-8, 2025

### INC Pavilion in Numbers



### INC Networking Reception at Anuga





## WHAT WE DO

# INTERNATIONAL EVENTS AND COUNTRY OUTREACH

In 2025, the INC played a pivotal role at key international events in the global nut and dried fruit industry, reinforcing its leadership and influence within the sector.

## 18th Food Exhibition for China Nuts and Dried Fruits Hefei, China

In April, the INC attended the 18th Food Exhibition for China Nuts and Dried Fruits, organized by the China Nuts Association (CNA). Highlights included a presentation by INC Vice Chairman Ashok Krishen giving a comprehensive global statistical overview of production, imports, exports, and consumption before a predominantly Chinese audience, and INC Chairman Michael Waring delivering the opening speech at the 2025 Industry Party and Welcome Reception, where he highlighted the INC's strategic vision, the importance of global cooperation, and the role of sustainability and innovation in securing long-term industry growth.



## China Tree Nuts Conference Ningbo, China

In August, an INC leadership delegation joined the 2025 China Tree Nuts Conference, hosted by the China Chamber of Commerce of Import and Export of Foodstuffs (CFNA), which brought together over 1,000 participants and more than 100 exhibitors. Highlights included INC Chairman Ashok Krishen's speaking about the INC's priorities and vision for the future, INC Executive Director Goretti Guasch discussing the INC's strategic initiatives, and INC Co-founder Pino Calcagni identifying key trends in worldwide tree nut production and trade. A special moment was the announcement of the 2026 INC Congress, which will take place in Macao in partnership with CFNA. Additionally, the INC held a strategic meeting with key industry players across China, including importers, exporters, and suppliers.



## 14th Golden Cashew Rendezvous Hanoi, Vietnam

In October, INC Chairman Ashok Krishen participated in the 14th VINACAS Golden Cashew Rendezvous, organized by the Vietnam Cashew Association (VINACAS). Mr. Krishen gave a keynote address in which he outlined the INC's mission and strategic vision, while offering a compelling statistical overview of the global tree nut industry—with a particular emphasis on the cashew industry. Mr. Krishen was also presented with the 2025 VINACAS Heritage Award, recognizing his leadership and contributions to the advancement of the global cashew industry, as well as his commitment to sustainable development across the value chain.





## WHAT WE DO

# INC ON-SITE TECHNICAL VISIT

From May 4-7, 2025, the INC On-site Technical Visit embarked on an unforgettable learning journey through southern Portugal and Spain. A dynamic group of 40 participants from 18 countries traveled over 700 km, visiting some of the industry's most innovative companies.

The program kicked off with a tour of the orchards and processing facilities of De Prado Almonds, followed by a visit to the walnut processing plant and operations of NOGAM. The INC then hosted a welcome cocktail and dinner presentation, featuring a special address by Tiago Costa, President of Portugal Nuts. The following day, the group visited the almond orchards and ultra-modern processing plant of ISFA before continuing to the pistachio orchards and processing facilities of Nuevos Cultivos Agrarios. On the third day, the group saw the advanced facilities of Calconut, and the program concluded on the fourth day with a visit to the key Mediterranean commercial port of Valencia. Participants then went their separate ways, with some continuing on to the INC Congress in Mallorca. There, the INC hosted a special networking session, where attendees proudly received their official diplomas.



**May 5**

ISFA: almonds, processing plant

Nuevos Cultivos Agrarios:  
pistachios, processing plant



**May 7**

Port of Valencia



**May 4**

De Prado Almonds: almonds,  
orchard, and processing plant

NOGAM: walnuts, processing plant

Special address by Tiago Costa,  
President of Portugal Nuts



**May 6**

Calconut: nuts & dried fruits,  
factory



**May 8 (INC Congress)**

Presentation of certificates for  
2025 students and networking  
session for alumni

## WHAT WE DO

# STAKEHOLDER MEETINGS

The INC participates in a broad range of meetings convened by industry groups and international organizations, offering its expertise, representing the interests of the nut and dried fruit sector, and promoting collaboration on important regulatory and trade matters.

### CODEX ALIMENTARIUS

At the 18th Session of the Codex Committee on Contaminants in Foods (CCCF18) in June, the Committee discussed a proposal to establish a maximum level (ML) for total aflatoxins in ready-to-eat peanuts. The INC expressed opposition to the proposed ML of 10 ppb, citing deficiencies in the dataset used to support the recommendation. The INC emphasized that any decision on the matter should be based on robust scientific evidence. After acknowledging data collection errors that had led to an incomplete dataset, the CCCF18 agreed to discontinue work on the ML at the moment. Later, in the fall, the INC registered to participate in two CCCF electronic working groups, to develop a *Code of Practice for the Prevention and Reduction of Ochratoxin A Contamination in Dried Fruits*, and to review the *Code of Practice for the Reduction of Acrylamide in Foods*.

In September, the INC took part in the 56th session of the Codex Committee on Pesticide Residues (CCPR56), where new maximum residue limits for various substances in nuts and dried fruits were reviewed, and several revocation proposals were discussed.

### UNITED NATIONS ECONOMIC COMMISSION FOR EUROPE (UNECE)

At its annual meeting in June, the Specialized Section on Standardization of Dry and Dried Produce reviewed standards for various nuts and dried fruits. The INC emphasized the increasing impact of climate change on production, citing unpredictable weather patterns and increasing pest pressures. With few tools available to manage pests effectively, the INC stressed the importance of updating standards and specifically requested a revision of the standards to include tolerances for cimiciato. The INC presented findings from a global survey revealing widespread climate-related production challenges across the nut and dried fruit industry, as well as progress on the INC-led *Code of Good Practice: Reducing Food Loss and Ensuring Optimum Handling of Dry and Dried Produce*.

In November, the INC participated in the annual meeting of the Working Party on Agricultural Quality Standards, which adopted revisions to the standards for in-shell walnuts and prunes and endorsed minor modifications to the standard layout for other products and the alignment of older versions. The INC provided an update on its key activities, including the launch of the Sustainability Certification program. The INC also emphasized the need to review the UNECE quality standards for macadamias. Building on the INC's survey on climate change impacts and grower resilience, discussions were held on how changing conditions affect product quality attributes.

### WAREN-VEREIN DER HAMBURGER BÖRSE

In November, the INC attended the 38th European Trade Meeting, organized by Waren-Verein der Hamburger Börse e.V., in Hamburg, Germany. Under the theme "From Challenge to Opportunity: Adapting to Changing Market Conditions," the meeting featured insightful presentations on a wide range of trade-related topics, including current trade challenges and logistics, how innovative business solutions can empower traders, and perspectives on retail and wholesale trade in the EU. A panel discussion entitled "Balancing Interests – What Makes Collaborations Future-Proof?" explored how stronger collaboration across the supply chain can help Europe navigate geopolitical fragmentation, trade barriers, and market volatility. Speakers emphasized that open markets, a more cohesive EU single market, and shared long-term strategies are essential for building resilience.

## KEY ISSUES:

Aflatoxins  
Ochratoxin A  
Acrylamide  
Pesticides  
Cimiciato  
Agricultural quality standards  
Food loss

## INC ACTIONS:

Advocacy to international bodies  
Codex committees on food contaminants and pesticides  
Code of good practice: Reducing food loss  
Survey on UNECE standards impact

## WHAT WE DO



The 2024/25 edition of the INC Academia recorded significant growth, reaching an all-time high of 71 students—an increase of 2.5 times compared with 2023/24 and 1.3 times above the previous peak in 2020. The program also benefited from the regular update of its curriculum, incorporating recent industry developments to keep content current and support a relevant learning experience. In particular, the Market Insights module was revised to reflect emerging topics and trends within the nut and dried fruit sector.

Since its launch in 2018, the INC Academia has supported more than 350 professionals in advancing their careers by providing access to high-quality industry knowledge and expert-led instruction. Its two online programs—Basic and Advanced—are designed to meet different training needs: the Basic course offers newcomers a solid grounding in the fundamentals, while the Advanced program delivers more in-depth, specialized content for experienced industry professionals.

## THE INC ACADEMIA PROGRAM COVERS THE FOLLOWING SUBJECTS:

### 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

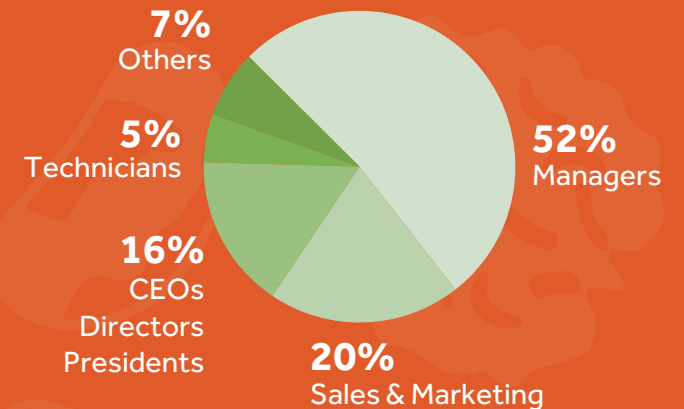


**350+**  
STUDENTS



**48**  
COUNTRIES

## Company Position





## WHAT WE DO



**INC SUSTAINABILITY<sup>®</sup>**  
INSTITUTE FOR NUTS  
& DRIED FRUIT

# INC SUSTAINABILITY INSTITUTE

In 2025, the INC announced the creation of the INC Sustainability Institute for Nuts & Dried Fruit—a landmark initiative designed to position the global nut and dried fruit sector at the forefront of sustainable development.

Conceived as a central driver to advance the industry's sustainability agenda, the Institute promotes sustainable growth across the supply chain while equipping INC members with practical resources to support meaningful progress on their sustainability journey.

With this initiative, the INC underscores that sustainability is not an auxiliary consideration but a core strategic priority for the sector.

As part of this project, the INC launched and published a brand-new website, [sustainability.nutfruit.org](https://sustainability.nutfruit.org), dedicated to showcasing its sustainability efforts and initiatives within the institute. The site features a public area that provides comprehensive information and insights, as well as a private section exclusively for certified INC members, offering exclusive access to the data hub and other key resources.

## Key Services Offered

- Data Hub**  
The Data Hub is a central repository of information, providing up-to-date insights on the nut and dried fruit industry's sustainability initiatives, practices, and scientific research. Exclusively available to INC Members participating in the Certification Program, it offers easy access to a wealth of tools and resources to support their sustainability journey. The Data Hub integrates three key databases, Scientific Studies, Sustainability Programs, and Metrics along with a dedicated resources page for practical guidance and reference.
- Certification Program**  
The INC Sustainability Certification is a B2B program designed exclusively for the global nut and dried fruit sector. Created by the industry, for the industry, it recognizes the progress companies have already made while providing a clear, structured framework to drive further improvements. Covering environmental, social, and governance (ESG) dimensions, the certification helps businesses prioritize sustainability, and align with best practices.
- Financial Services**  
The INC will seek recognition of its certification with financial institutions to offer exclusive loan opportunities for members who achieve the INC Certification. These recognitions secure preferential terms, making it easier for certified members to access sustainability-focused financing and further support their efforts to advance sustainable practices.

## Objectives



**Promote Sustainable Growth**



**Develop Key Sustainability Tools**



**Knowledge Sharing Through the Data Hub**



**Global Recognition with INC Certification**



**Support Innovation and Impact**

## WHAT WE DO



**INC SUSTAINABILITY®**  
INSTITUTE FOR NUTS  
& DRIED FRUIT

# INC SUSTAINABILITY CERTIFICATION

With the establishment of the Institute, the INC launched the INC Sustainability Certification in 2025—the first certification created exclusively for the global nut and dried fruit sector. Tailored to the industry's unique challenges and characteristics, this certification enhances market access, strengthens international partnerships, and validates sustainability efforts through a streamlined, effective process. It positions INC members at the forefront of sustainability leadership worldwide.

In 2025, the Standards for Growers of Almonds, Macadamias, Walnuts, Pistachios, Hazelnuts, and Raisins were published, together with the Standards for Processors & Manufacturers, and the Standards for Global Trade Specialists.

Certified participants will earn the right to display the official INC Certification trademark—a globally recognized symbol of sustainability and market leadership.  
For more info, visit: [sustainability.nutfruit.org](https://sustainability.nutfruit.org)

## PURPOSE, ATTRIBUTES, AND INDUSTRY IMPACT



### Establish a global framework

The INC Certification Program provides a unified and credible framework for promoting sustainable production across the nut and dried fruit industry.



### Provide a reference for sustainable practices

Developed in line with international guidelines, industry best practices, and expert collaboration, the program establishes clear standards for three key operator categories: growers, processors and manufacturers, and global trade specialists.



### Become the gold standard

To ensure impartiality, all certifications are verified by independent, authorized auditing bodies.



### Recognize and reward

Certified participants earn the right to display the official INC trademark—a globally recognized symbol of sustainability and market leadership.

## WHAT WE DO

# NUTPOOL

Launched in 2024, the INC-funded NUTPOOL project reached key milestones in 2025. Drawing on a far-reaching meta-analysis of one million participants worldwide, this groundbreaking study will fill knowledge gaps and assess how nut intake relates to the prevention of major non-communicable diseases (type 2 diabetes, cardiovascular disease, coronary heart disease, stroke, cancer, dementia and Alzheimer's disease) and mortality. Using a standardized methodology to ensure globally representative findings, NUTPOOL is poised to mark a significant milestone in nutritional epidemiology and our understanding of nuts and health.

In 2025, NUTPOOL reached the halfway point of its three-year timeline. With its data protocol and standardized analysis tools now finalized, the project has reached out dozens of cohorts worldwide, with 27 meeting the rigorous eligibility criteria to date, ensuring broad representation across the Americas, Europe, Asia, and Oceania. By year's end, 20 cohorts had performed the standardized analysis individually and verification was ongoing, underscoring the project's steady progress.

NUTPOOL will play a pivotal role in advancing goal #2 of the INC's newly refreshed strategic roadmap for 2026-2030: Obtain a health claim and update dietary guidelines. The comprehensive data produced by this trailblazing study will support the INC's efforts to secure a legally recognized health claim for nuts and advocate for updates to dietary guidelines, ultimately encouraging greater nut consumption across the globe.

## First meta-analysis of its kind



>1 million participants



4 continents



3 years

**NUTPOOL**  
is exploring the  
relationship  
between nut  
consumption and  
prevention of:

- TYPE 2 DIABETES
- CARDIOVASCULAR DISEASE
- CORONARY HEART DISEASE
- STROKE
- CANCER
- DEMENTIA
- ALZHEIMER'S DISEASE
- MORTALITY



## WHAT WE DO

# NUTS 2025

From October 9-10, 2025, the world's leading nutrition researchers gathered at the INC Headquarters in Reus, Spain, for NUTS 2025, the only international event dedicated exclusively to scientific dialogue on nut and dried fruit research. Building on the success of the previous edition held in 2022, this year's conference once again confirmed its unique role as a global platform for advancing scientific understanding of nuts and dried fruits, providing insights that will shape nutrition research in the years ahead.

Organized by Rovira i Virgili University, the Pere Virgili Institute of Health Research, and CIBERObn, and sponsored by the INC, NUTS 2025 brought together 28 speakers and moderators from 12 countries. Across two days of intense presentations and debate, participants examined the effects of nut consumption throughout the human lifespan—from fertility and pregnancy to aging—drawing on the most significant research conducted to date. The conference was chaired by Prof. Jordi Salas-Salvadó, Chairman of the INC World Forum for Nutrition Research and Dissemination and Distinguished Professor at Rovira i Virgili University in Spain.

From the discussions, three priority themes for future research clearly emerged: cognitive health, gut microbiota, and diabetes prevention. A highlight of the event was the proposal for a multi-center, multi-continent clinical trial to investigate the impact of nut consumption on diabetes prevention—a study that could have far-reaching implications for global health and pave the way for future health claims. A white paper summarizing the conference's key findings and insights will be published in a scientific journal, providing a definitive reference for researchers and clinicians in the years to come.



## Topics covered:

- Nuts and metabolic health
- Cardiovascular health and beyond
- A lifecourse perspective
- Immunity and allergies
- Novel lines of research
- Health claims
- Dried fruits and bone health
- Biomarkers and the gut microbiome
- Sustainability and upcycling
- Nuts and the brain

## WHAT WE DO

# INC MULTI-COUNTRY DISSEMINATION PLAN

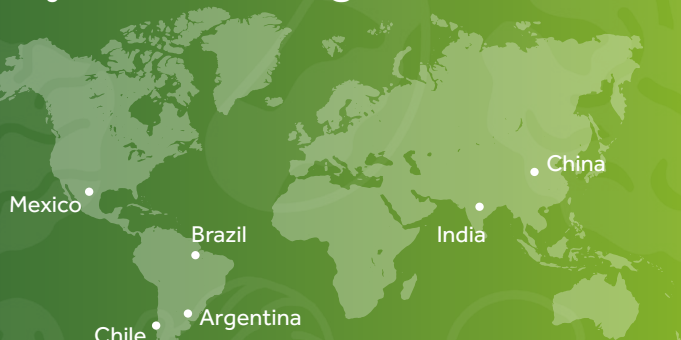
Gen Z is reshaping global food habits. Driven by a desire for authenticity, wellness, and creativity, this generation is transforming how people approach eating—and the INC is making sure nuts and dried fruit are part of their everyday choices.

In 2025, the Multi-Country Dissemination Campaign continued to energize young consumers in China, India, and Latin America, fostering a movement that goes beyond snacks to promote a lifestyle centered on health, enjoyment, and versatility. By introducing fresh new elements alongside successful components from previous campaigns, including innovative AI-created contents, it kept our audience engaged at a high level.

## Highlights by Market

Metric	Latin America (since 2024)	China (since 2022)	India (since 2023)	Total
Reach	310M	273.2M	215.6M	798.8M
Engagement	2.7M	3.16M	9.2M	15M
Followers	325K	34K	154.5K	513.5K

## Key Markets Targeted in 2025



## China

The 2025 campaign tapped into Gen Z's passion for self-expression and authenticity. "Own Your Now" empowers Chinese Gen Z to live authentically, fueled by the energy and clarity that nuts and dried fruits provide. The concept came to life through partnerships with popular Douyin creators, connecting with China's outdoor sports trend and showing how nuts and dried fruits give people the energy to live life to the fullest. Recipes were also a key element, showcasing creative ways to enjoy these ingredients—such as nut-based flours, trail mixes, and homemade nut beverages—transforming everyday snacking into a vibrant culinary experience.





## WHAT WE DO

# INC MULTI-COUNTRY DISSEMINATION PLAN

## India

The 2025 Indian campaign focused on wellbeing, plant-based protein, and everyday energy, reflecting Gen Z's growing interest in health and mindful living. Through digital storytelling and quick, accessible recipe ideas—compiled into a downloadable e-book—the campaign highlighted breakfasts, post-workout snacks, and on-the-go energy boosts. The Nut Tunes characters were prominently featured, adding a modern, cohesive touch across content. Beyond starring in posts, they were brought to life through a sticker collection, reinforcing their presence and engaging Gen Z audiences. Influencers and nutritionists showcased how small, mindful choices, like incorporating nuts and dried fruits, can make a meaningful impact on a health-conscious lifestyle.

## Latin America

In 2025, the Latin America campaign built on the momentum of 2024 with "Nut Tunes Behind the Scenes," an AI-created campaign, offering a look at the making of last year's music videos featuring our Nut Tunes heroes. The videos combined relatable storytelling with subtle mentions of the health benefits of nuts and dried fruits, captivating audiences while continuing to promote our tunes on Spotify. Recipe content was also central, showcasing how nuts and dried fruits can enhance local favorites with flavor and nutrition, positioning them as a lifestyle staple rather than just a snack. Influencers played a key role in encouraging nut and dried fruit consumption, further amplifying the campaign's reach.



## WHAT WE DO

# NUTFRUIT RECIPES

The INC's recipe campaign has gained strong online traction by highlighting how nuts and dried fruits can be both delicious and visually appealing. In our 2025 global campaign we emphasized using them not just as complementary ingredients but as key components in creative recipes, including nut flours as gluten-free alternatives for both sweet and savory baking. In Latin America, we reimagined traditional recipes with a nutty twist positioning them as versatile, must-have ingredients in everyday cooking.

Our recipes, featuring vibrant images and step-by-step videos, are shared across TikTok, Instagram, YouTube, and Facebook—where our audience loves them most. They have become some of our most-loved content, inspiring fans to discover creative ways to enjoy nuts and dried fruits and making our brand a go-to source for tasty, engaging ideas.

### HIGHLIGHTS FROM 2025



40

VIDEO RECIPES  
CREATED



15 million

VIEWS ACROSS  
INSTAGRAM,  
TIKTOK, YOUTUBE  
AND FACEBOOK



16

NEW RECIPES  
FOR LATIN  
AMERICA

### TOTAL RECIPES TO DATE



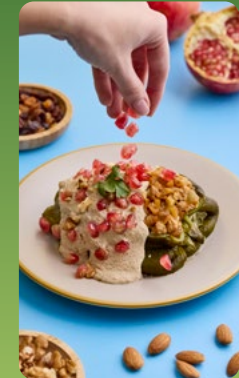
200

RECIPES  
CREATED



49 million

VIEWS ACROSS  
INSTAGRAM, TIKTOK,  
YOUTUBE AND  
FACEBOOK





## WHAT WE DO SOCIAL MEDIA

Our yearly social media **strategy** targets two main audiences—consumers and industry professionals—with the goal of generating measurable results while advancing the INC’s mission to increase global consumption of nuts and dried fruit.

### HIGHLIGHTS FROM 2025:

#### INDUSTRY (INC PROFESSIONALS)

On our industry-focused INC channels, we aim to raise awareness, spotlight our key initiatives, and demonstrate the value of membership for businesses, positioning the INC as the place-to-be in the nut and dried fruit industry and our social media as the go-to for the latest **updates**.



The content we share on the INC’s Instagram, LinkedIn, YouTube and X platforms has:



REACHED

**8.4 million**  
PEOPLE



GAINED

**126,000**  
INTERACTIONS

Top contents were our communication for the INC Congresses: Mallorca 2025.

#### CONSUMER (NUTFRUIT)

On Nutfruit’s social media, we connect with health-focused Gen Z and Millennials by showing just how delicious, healthy, and easy it is to enjoy nuts and dried fruits every day. Our creative content reflects their lifestyles and values, making healthy snacking fun and irresistible.



Our publications across the Nutfruit Instagram, TikTok, Facebook and YouTube have :



REACHED

**32.4 million**  
PEOPLE



GAINED

**224,900**  
INTERACTIONS

Top contents were our Nutfruit Spreads, which shared a simple image highlighting the ingredients for a simple spread, our Nutfruit Flour recipes and of course our global recipe content, which focused on easy healthy options for different mealtimes. The content reached **450,779 people**.

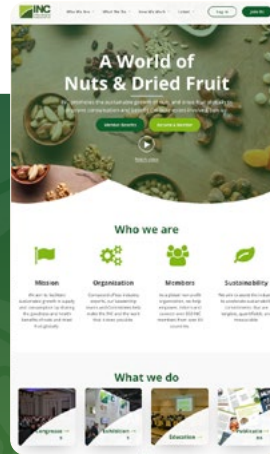


## WHAT WE DO

# MAIN INC WEBSITES

## INDUSTRY WEBSITE INC.NUTFRUIT.ORG

The industry website acts as a central hub for the sector, delivering timely updates on key developments such as trade and tariff changes, newly released scientific research, and INC activities.



## HIGHLIGHTS FROM 2025



**62,000**  
USERS



**200,000**  
PAGE  
VIEWS



**232**  
NEWS ITEMS  
PUBLISHED

## TOP 5 COUNTRIES



## DEVICES

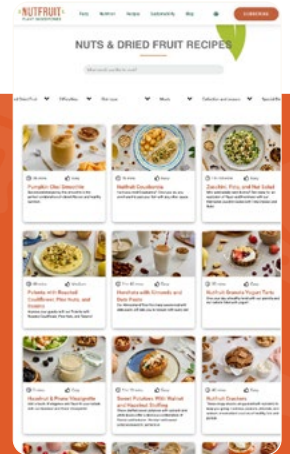
MOBILE  
27%



DESKTOP  
72%

## CONSUMER WEBSITE NUTFRUIT.ORG

Our consumer website inspires healthier everyday choices through flavorful recipes and accessible nutrition guidance that make enjoying nuts and dried fruits simple and enjoyable.



## HIGHLIGHTS FROM 2025



**43,000**  
USERS



**66,000**  
PAGE  
VIEWS

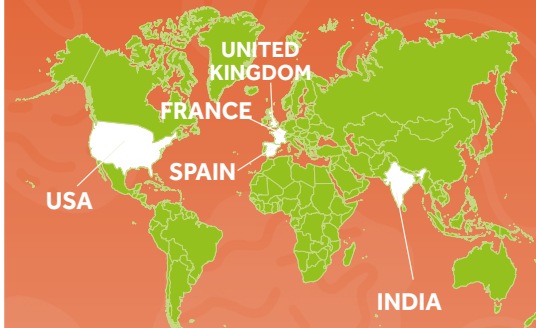


**241**  
RECIPE E-BOOKS  
DOWNLOADED



**10**  
BLOG ARTICLES  
PUBLISHED

## TOP 5 COUNTRIES



## DEVICES

TABLET 3%



DESKTOP  
52%



MOBILE  
45%

NUTFRUIT.ORG IS NOW AVAILABLE IN SPANISH, PORTUGUESE, CHINESE, AND HINDI.



The background is a dark blue gradient. It is filled with numerous faint, light blue icons of various types of nuts, including almonds, walnuts, and hazelnuts, scattered across the surface. On the right side, there is a large white triangular shape pointing towards the center. Below this triangle, there are two overlapping geometric shapes: an orange rectangle and a dark green rectangle, both tilted at an angle.

# **MEMBER RESOURCES**

## MEMBER RESOURCES

# Nutfruit Magazine

As the INC's official publication, *Nutfruit* continues to offer compelling and varied content tailored to the global nut and dried fruit sector. In 2025, the magazine maintained its regular schedule, publishing three engaging issues in March, July, and November, keeping readers informed and connected throughout the year.

## HIGHLIGHTS OF THE YEAR:

**Insights from industry leaders:** Karolina Hofstätter, Buying Manager Global Sourcing at the ALDI SOUTH Group, shared her perspective on the key factors influencing the group's global sourcing strategy for nuts and dried fruits, strategies to address climate-related risks in the supply chain, and more.

**Golden Nut Award winner:** Mercadona discussed how the Spanish supermarket chain's purchasing strategies have evolved in response to evolving consumption patterns in nuts and dried fruits, in an interview with Purchasing Manager Óscar Montero.

**Cutting-edge research:** Dr. David Baer, winner of the 2025 INC Excellence in Research Award, explored the role of nuts in helping maintain a healthy body weight. In a separate feature, a group of three researchers from the University of Pretoria in South Africa, led by Dr. Nicky Taylor, contributed a feature article about optimizing irrigation practices in macadamia orchards. The magazine also provided special coverage of the historic NUTS 2025 gathering of leading international nutrition researchers at INC headquarters.

**Tariff updates:** Julie Adams, Chair of the INC Scientific and Government Affairs Committee, wrote about current tariff tensions and the pillars of the industry's strategy to address this issue.

As always, the magazine's regular sections continued to captivate readers, offering the latest updates from the INC and insights into the global nut and dried fruit industry.

6,150

PEOPLE VISITED THE  
MAGAZINE SECTION  
OF THE WEBSITE

3,490+

READERSHIP  
(PRINT EDITION)

## MAGAZINE SECTIONS

- Business News
- Gourmet
- Legal Update
- Feature Articles
- Country/Product Spotlight
- Health News
- A Chat With the Industry
- INC Congress
- INC News
- Global Crop Update & Outlook
- Industry News



## MEMBER RESOURCES

# NEWSLETTERS

In 2025, the INC continued to inform the global nut and dried fruit sector through a lively series of newsletters tailored to professionals and consumers alike. Industry-oriented editions provided essential updates on tariffs, sustainability, food safety and labeling regulations, health research, and timely statistics, equipping stakeholders with valuable insights. Consumer newsletters, meanwhile, engaged readers with recipes, blog features, and articles highlighting the health benefits of nuts and dried fruits.

Special editions highlighted key milestones, including the INC Congress and other industry events. To expand its global reach, the INC delivered 11 Chinese-language newsletters, sharing key updates with 306 Chinese contacts and strengthening our engagement in this vital market.

INC newsletters deliver up-to-date news, expert insights, and essential information for industry insiders, keeping our members informed, inspired, and connected.



## 65 Editions Sent in 2025



## 70,500 NEWSLETTERS OPENED



## Newsletter Type

- INDUSTRY: 25
- CONSUMER: 8
- CONGRESS: 11
- MAGAZINE: 3
- AD-HOC: 7
- INDUSTRY UPDATE FOR CHINA: 11

## MEMBER RESOURCES

# NUTS & DRIED FRUIT GLOBAL STATISTICAL REVIEW

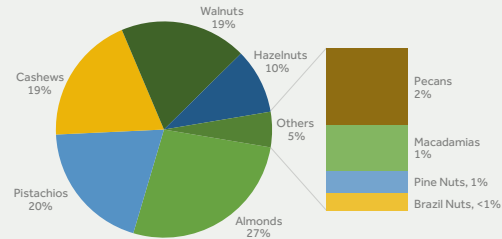
The 2025 Edition of the Nuts & Dried Fruit Global Statistical Review was released at year-end, offering members an exclusive decade-in-review of global production, trade, and consumption. The review provided an updated overview of long-term global trends, highlighting the steady expansion of tree nut and peanut output, stable dried fruit volumes, and the contributions of key producing regions. It also reflected the latest trade dynamics, highlighting the main exporting regions as well as import demand in major global markets. Consumption patterns were also analyzed among the main nut and dried fruit categories and across regions.

\* 2024/25, NUTS IN KERNEL BASIS, EXCEPT PISTACHIOS AND PEANUTS IN-SHELL.  
\*\* 2024, NUTS IN KERNEL EQUIVALENT, EXCEPT PISTACHIOS IN IN-SHELL EQUIVALENT.

## HIGHLIGHTS OF THE 2025 STATISTICAL YEARBOOK

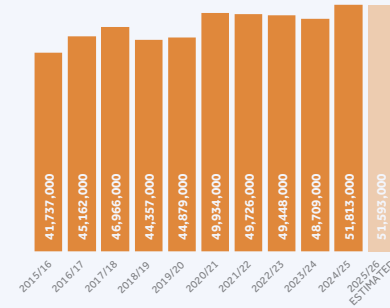
### WORLD TREE NUT PRODUCTION

(Metric Tons, kernel basis, except pistachios in-shell, 2024/25)



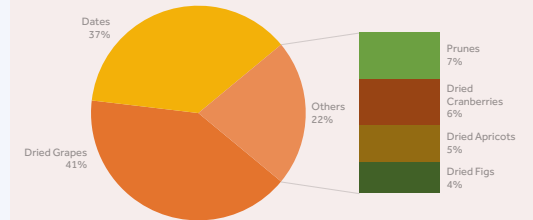
### WORLD PEANUT PRODUCTION

(Metric Tons, in-shell basis)



### WORLD DRIED FRUIT PRODUCTION

(Metric Tons, 2024/25)



## TREE NUTS

PRODUCTION  
6.02 M MT\*

EXPORTS  
5.05 M MT\*\*

CONSUMPTION  
5.57 M MT\*\*

## PEANUTS

PRODUCTION  
51.81 M MT\*

EXPORTS  
3.50 M MT\*\*

CONSUMPTION  
23.04 M MT\*\*

## DRIED FRUIT

PRODUCTION  
3.25 M MT

EXPORTS  
3.60 M MT

CONSUMPTION  
3.30 M MT

## TOP PRODUCING COUNTRIES, 2024/25

### TREE NUTS

USA  
TÜRKIYE  
CHINA  
IRAN  
CÔTE D'IVOIRE

### PEANUTS

CHINA  
INDIA  
NIGERIA  
USA  
ARGENTINA

### DRIED FRUITS

IRAN  
USA  
TÜRKIYE  
SAUDI ARABIA  
INDIA



## MEMBER RESOURCES

# TRADE MAPS

In 2025, the INC released the latest edition of one of its members' most valued statistical publications: the Nut and Dried Fruit Trade Map series.

Published every two years, the series offers six world maps summarizing global routes of nuts and dried fruits, highlighting key origins, destinations, and traded volumes for the different products.

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)
- Peanut Trade Flows (shelled + in-shell)
- World Dried Fruit Trade Flows
- Intra-European Dried Fruit Trade Flows

The Trade Map series provides a clear snapshot of global nut and dried fruit movements, highlighting the main origins, destinations, and world trade patterns.

EXPORTS TOTALED  
**15.11 M**  
METRIC TONS\*

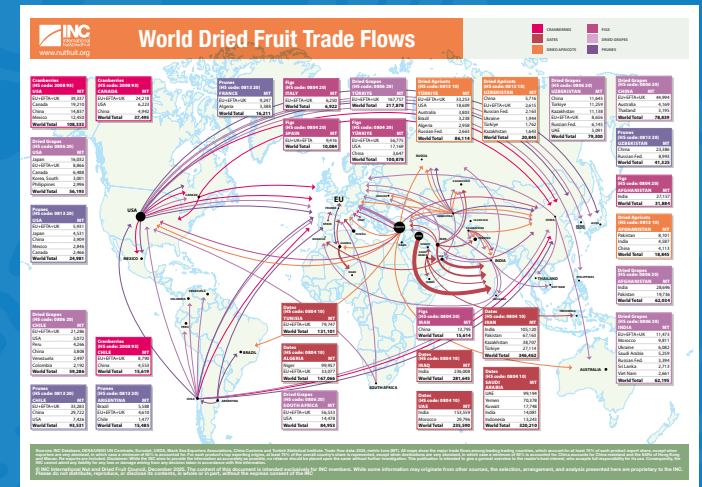
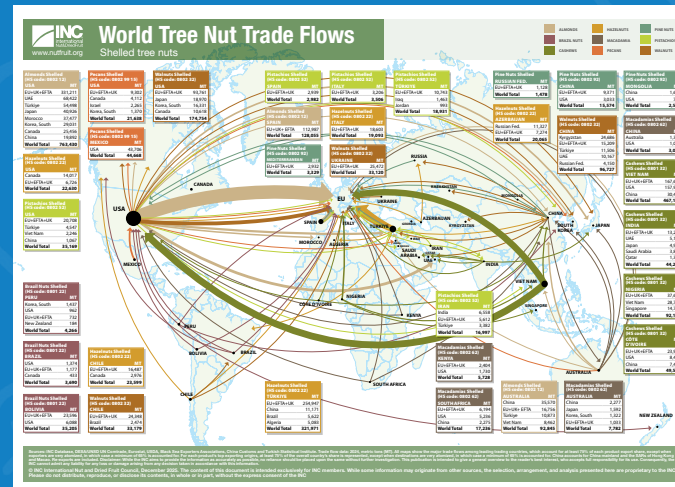
**3.15 M MT**  
SHELLED TREE  
NUT EXPORTS

**4.76 M MT**  
IN-SHELL TREE  
NUT EXPORTS

**3.26 M MT**  
SHELLED PEANUT  
EXPORTS

**3.60 M MT**  
DRIED FRUIT  
EXPORTS

\*TRADE FLOW DATA 2024, JANUARY-DECEMBER.





## MEMBER RESOURCES

# DATABASES

The INC's databases offer members an authoritative gateway to industry intelligence.

## STATISTICS DATABASE

In 2025, the INC continued to strengthen and expand its online statistics database, which remains a valuable tool for the nut and dried fruit industry, allowing members to conduct their own analysis. By providing historical series dating back more than two decades, the database helps members to monitor and identify long-term trends with ease. In 2025, it reaffirmed its role as a trusted reference for industry professionals seeking reliable, timely, and comprehensive statistical insights.



### COVERING THE ENTIRE NUT AND DRIED FRUIT WORLD



## TECHNICAL DATABASES

The INC's technical databases give members access to more than 5,300 reliable research studies and legal documents spanning a wide range of disciplines. Coverage includes nutrition and allergy research, food safety, sustainability, food technology, and more. Thanks to clear and efficient search tools, members can quickly locate relevant information to support informed strategic and operational decision-making.

### SCIENTIFIC STUDIES



### LAWS & REGULATIONS



## MEMBER RESOURCES

# TARIFFS

Tariffs have emerged as an issue of great concern to the industry. Throughout 2025, the INC has tracked key developments, provided timely and actionable updates to members, and advocated for free trade via public consultations and position statements.

### MONITORING AND COMMUNICATIONS

- **Tariffs Timeline**

Created in spring 2025 as the tariff issue took center stage, the INC Tariffs Timeline offers a chronological record of all new developments affecting nuts and dried fruits. Over the year, it has emerged as a key resource to help the industry stay abreast of key developments, as well as one of the most-visited pages on the INC website.

- **Tariff Report & Updates**

As tariff-related developments became increasingly significant, the INC stepped up regular updates to keep members fully informed, culminating in the launch of Tariff Report & Updates as a dedicated section of the INC industry newsletter. The most important updates were also compiled for inclusion in *Nutfruit* magazine.

### INC POSITION STATEMENTS

- **INC Position Statement Against EU Tariffs on US Almonds**

The INC opposed new EU tariffs on US almonds, arguing that such measures would hurt businesses, threaten supply security, and raise the cost of healthy foods for consumers, and that no alternative producing country could meet EU demand.

- **INC Position Statement Against Additional EU Tariffs on US Nuts and Dried Fruits**

The INC opposed additional duties on US nuts and dried fruits that were set to be imposed if EU-US negotiations failed.

- **INC Global Position Statement on Tariffs**

To assist INC members in their advocacy efforts, the INC created this statement urging governments to remove tariffs on nuts and dried fruits, engage with the industry, favor dialogue over retaliation, consider the sector's unique trade characteristics, and accelerate negotiations on free trade agreements that include agricultural products.

## MEMBER RESOURCES

# SCIENTIFIC AND TECHNICAL UPDATES

The INC proactively identifies and monitors issues of concern to the sector and provides members with timely and actionable updates. The following is a brief summary of the most important issues tracked during 2025.

### Agricultural quality standards

The INC informed members of news about United Nations Economic Commission for Europe (UNECE) Agricultural Quality Standards. Revisions were adopted to the standards for in-shell walnuts and prunes and minor modifications to the standard layout for other products and the alignment of older versions were endorsed.

### Brown marmorated stink bug

In 2025, the INC informed members of interesting updates on efforts in Türkiye and Georgia to mitigate the threat of the brown marmorated stink bug (*Halyomorpha halys*) shared by members of the hazelnuts round table at the INC Congress in Mallorca. The INC also raised the impact of climate change and pests, including *H. halys*, on quality standards in discussions at the UNECE.

### Food safety

The INC provided regular updates on food safety issues of concern to the industry, including the maximum levels allowed for contaminants, pesticides, and additives. Key topics of interest included aflatoxins, ochratoxin A, *Alternaria* toxins (e.g. tenuazonic acid), bisphenol A, fosetyl, mineral oils (MOSH/MOAH), nickel, and sulfur dioxide (SO<sub>2</sub>).

In addition, the INC informed members about its response to the EU's call for evidence on the Food and Feed Safety Simplification Omnibus. The INC expressed support for efforts to streamline regulatory procedures and reduce administrative burdens on food business operators, while calling for greater clarity and harmonization in the interpretation of existing provisions on the handling of non-compliant consignments.

### Import controls

The INC informed members of important developments related to import controls. After giving Iran six months to resolve concerns about aflatoxin contamination in Iranian pistachios, in 2025 the EU decided not to impose a ban and retained a six-month monitoring cycle, with 50% checks in place. Additionally, in July the EU established 30% checks for both aflatoxins and ochratoxin A in Turkish dried figs, supplanting previous rules that only envisaged 20% aflatoxin checks.

### "Healthy" nutrient content claim

The US Food and Drug Administration (FDA) updated the definition of the "healthy" nutrient content claim, under which nuts now qualify for the claim. After a two-month delay, the new rule took effect in April 2025. The INC supported the adoption of the new definition and submitted science-based comments to the FDA in support of the change. In 2025, the INC notified members of the delayed implementation and shared practical guidance about the new rule.

### Labeling

Topics of interest this year included allergy labeling rules, front-of-package nutrition labeling rules, news about protected designations of origin, rules about the labeling of vegan and organic products, rules of origin used to determine the "nationality" of imports for trade purposes, and specifications on adhesives for labels on food packaging.



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