NUTFRUIT
Edition 97. N° 1
March 2026

NUTFRUIT®

THE VOICE OF THE **INC** FOR THE GLOBAL **NUT AND DRIED FRUIT** INDUSTRY

Edition 97. N° 1 **March 2026**

43RD INC WORLD NUT AND DRIED FRUIT CONGRESS
MAY 12-14, 2026
MACAO, CHINA

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

Edition 97. Nº1 **March 2026**

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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Positioning Nuts and Dried Fruit at the Center of the Global Conversation

ASHOK KRISHEN
INC CHAIRMAN

As we move further into 2026, I am pleased to share the outlook for the nut and dried fruit industry. Over the past year, our sector has been navigating complex trade dynamics, compounded by geopolitical challenges in certain regions, including the Persian Gulf, where recent hostilities have significantly disrupted shipping and logistics. We are mindful of the human impact of these events and extend our concern to all those affected by the conflict. While these events present real challenges, the fundamentals of our sector still remain strong and resilient, positioning us for continued progress.

With all major crops progressing well, I expect this year to pass the previous one in terms of adequate supply. With these favorable conditions, our goal remains to grow the sector at the same compound annual growth rate that we have achieved in the past. But beyond maintaining growth, our ambition is to accelerate it—expanding consumption while upholding the highest standards of quality, innovation, and sustainability.

This environment is not only a reflection of strong crops but also of the enduring international appetite for nuts and dried fruit. Consumers continue to value these products for their nutritional benefits, versatility, and role in a balanced diet. Now is the time to amplify this message—clearly and confidently—positioning nuts and dried fruit at the center of the global conversation on health and sustainable nutrition.

Our commitment to global advocacy was recently exemplified by a visit to New Delhi by an INC leadership delegation. The trip was a key component of our broader efforts to conduct outreach to high-level officials in major producing and importing countries to boost global trade and consumption. During our visit, we held productive meetings with key officials from India's agriculture ministry. We used these talks to underscore the INC's unwavering support for free trade, discuss collaborative ways to encourage increased consumption, and express support for the Indian government's national plan to boost nut production.

These strategic engagements on the world stage are essential for opening markets, but they represent only one part of the INC's mission to promote sustainable growth globally. Beyond direct advocacy, we continue to orchestrate strategic programs that drive the long-term evolution of our industry on every level. From supporting the pursuit of a health claim for nuts to spearheading sustainability efforts across the value chain, the INC is leading initiatives that shape the future of our sector. Sustainability is increasingly central to how we operate—from climate-smart cultivation practices to eco-conscious processing and packaging. By embedding these core principles across the value chain through the INC Certification, we safeguard not only the environment but also the long-term viability and reputation of our sector as a responsible and forward-looking part of the global food system.

Looking ahead, I am particularly excited about the upcoming INC Congress in Macao this May. The Congress remains the world's premier platform for our industry to come together—to exchange insights, identify emerging trends, and forge meaningful connections that drive business growth. It is the place where vision turns into strategy, strategy into action, and collaboration translates into measurable progress. Beyond the professional opportunities, it is also a time to enjoy the company of friends and colleagues, celebrating our shared passion for this remarkable industry. I look forward to seeing you all there as we shape the next phase of our industry's journey together.

The INC continues to serve as the central hub for our global community. In an increasingly dynamic marketplace, we are committed to equipping our members with the insight, foresight, and tools they need not only to adapt—but to lead. I encourage all members to make the most of this year's opportunities, engage with the INC community, and join us in Macao to shape the next chapter of our industry's journey.

As always, I extend my gratitude to our Executive Committee, Board of Trustees, and INC headquarters team for their dedication and hard work. Together, we create a foundation that supports every member and strengthens the global impact of our industry.

Kind regards,

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From Strategy to Action: Advancing Health, Sustainability, and Global Consumption

GORETTI GUASCH
INC EXECUTIVE DIRECTOR

Earlier this month, the INC Executive Committee gathered in Los Angeles to review progress on our strategic priorities and make important decisions that will shape the next phase of our work. Meeting in California—one of the world's most dynamic hubs for nut production, innovation, and research—provided an ideal setting to move from strategy to action.

Our discussions centered on the three pillars that define the INC's strategic direction: health, sustainability, and increasing global consumption of nuts and dried fruit. I am pleased to share several significant milestones achieved during this visit.

Breaking New Ground in Health Research

A key item on the Executive Committee's agenda was the approval of funding for a landmark clinical trial focused on diabetes prevention. I am delighted to confirm that the Committee has endorsed this initiative, which represents a significant step forward in advancing our health strategy and brings us closer to our objective of securing an authorized health claim.

The PRENUT trial will be a multi-center, multi-continent randomized study designed to assess whether mixed nuts can prevent the development of diabetes in high-risk individuals. This study represents a natural next progression following the funding of the NUTPOOL meta-analysis, and forms part of our broader, long-term strategy to generate robust scientific evidence supporting the inclusion of nuts in dietary guidelines and the promotion of increased daily nut consumption worldwide.

By continuing to invest in high-quality, rigorous research, we are reinforcing our commitment to ensuring that nuts remain an integral component of healthy, balanced diets across the globe.

Recognizing Excellence in Sustainability

Sustainability remains central to our strategic agenda, and we reached an important milestone during the start of 2026. The INC has formalized its partnerships with auditing bodies Bureau Veritas, our global partner, and DFA of California in the United States, Canada and Mexico. During our trip, INC leadership met with DFA of California to officially sign the agreement confirming its role as an auditing partner for the INC Sustainability Certification. With auditing capacity now in place, INC members can now begin obtaining certification, providing an independent mark that recognizes and validates their sustainability efforts.

During the same trip, the Executive Committee also visited the Resnick Sustainability Institute at California Institute of Technology. This visit reinforced the importance of science-based solutions in addressing environmental challenges and highlighted the ways in which rigorous research and practical initiatives can complement one another to advance sustainability in our sector.

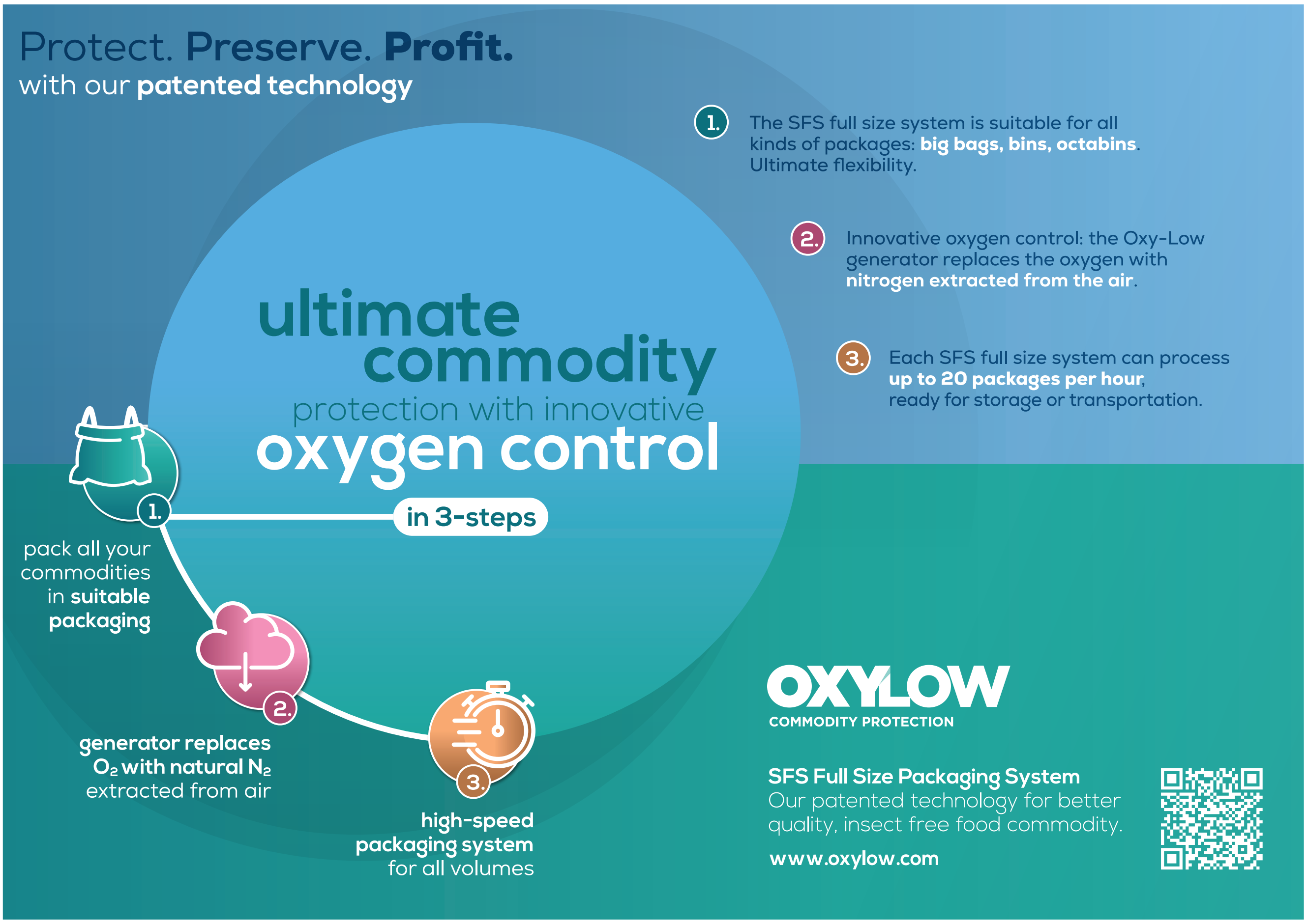
Expanding Our Reach in Southeast Asia

Driving global consumption remains essential to maintaining a healthy balance between supply and demand. Building on the success of our Multi-Country Dissemination Plan in China, India, and Latin America, we are preparing to expand into Southeast Asia in 2026.

Home to approximately 185 million Gen Z consumers, the region represents a dynamic and digitally connected market. Indonesia, Viet Nam, Thailand, and the Philippines have been identified as priority countries, where youthful populations, rising middle classes, and mobile-first lifestyles are rapidly shaping new food trends.

I am particularly excited to share that we have recently finalized a comprehensive Gen Z survey in these four markets. The insights gathered will guide our regional strategy and ensure our messaging resonates locally. I look forward to presenting the results during the opening ceremony at the INC Congress in Macao this May.

From approving groundbreaking health research to the implementation of our Sustainability Certification and expansion into new growth markets, these developments reflect tangible progress in delivering our strategic priorities. Together, they underscore a period of focused execution and momentum for the global nut and dried fruit industry.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Voicevale Acquires Totally Nuts & More

Voicevale Ltd, a global trader and distributor of nuts, dried fruits, seeds, and coffee, has acquired the assets and business of Totally Nuts & More Inc., a Montreal-based specialty importer and distributor of nuts and dried fruits. The transaction, effective January 1, 2026, creates Voicevale North America Inc., with Voicevale holding a 75% stake and Totally Nuts founder Philip Khazzam retaining 25%. Voicevale North America will trade as "Totally Nuts, a division of Voicevale North America," preserving the established brand while benefiting from Voicevale's global sourcing expertise and network. The acquisition strengthens Voicevale's presence in the Americas, enhancing supply chain capabilities and customer reach. Roby Danon, Voicevale's founder, described the acquisition as "an exciting new chapter in our group's growth strategy." Reflecting on the transition, Khazzam said: "We now join the Voicevale team, allowing us to provide a wider line of products, expanding our reach, and continuing to serve our customers with the same dedication and integrity that have defined us for years."

Natra Acquires Dutch Peanut Butter and Ingredients Supplier Bredabest

Natra, a leading European private label and co-manufacturing company for chocolate products, has acquired Dutch peanut butter and ingredients producer Bredabest, creating a stronger platform for sweet spreads and confectionery. The acquisition combines Bredabest's expertise in peanut processing with Natra's global scale and distribution network, expanding Natra's portfolio to include peanut-based spreads and other ingredients, while strengthening cross-selling opportunities and supply chain integration. Founded in 1996, Bredabest supplies pure and natural peanut spreads to retailers and consumer brands across more than 30 countries. Its two processing facilities in the Netherlands will continue operations, with all employees retained. Founders Pieter Stienen and Rainier van Rey continue in leadership roles and remain shareholders of the group, ensuring continuity and preserving the company's entrepreneurial culture.

Barry Callebaut Appoints Former Head of Unilever as New CEO

Hein Schumacher.
Photo: Barry Callebaut

Barry Callebaut has appointed Hein Schumacher as the company's new CEO, effective January 26, 2026, succeeding Peter Feld. Born in 1971, Schumacher brings over 25 years of experience in the food sector. He served as CEO of Unilever from 2023 to 2025. Previously, he was CEO (2017-2023) and CFO (2015-2017) of Royal FrieslandCampina, and spent over a decade at HJ Heinz (now Kraft Heinz), holding senior leadership roles including President & CEO Asia Pacific and Executive Vice President China. Patrick De Maeseneire, Chairman of the Barry Callebaut Group, described Schumacher as "the right leader at this stage to chart Barry Callebaut's next phase of increased customer focus, winning culture and financial strength."

Ingredients Manufacturer Puratos Acquires US Nut Spread Maker Vör Foods

Puratos, a leading global bakery ingredients manufacturer, has acquired Vör Foods, a high-growth US producer of innovative high-performance nut spreads and nut-based fillings based in Trevose, Pennsylvania. The acquisition strengthens Puratos's US manufacturing footprint and enhances its ability to respond to fast-growing trends in nut-based ingredients. The Vör Foods portfolio—including pistachio, hazelnut, almond, cashew, and blended nut spreads and fillings—complements Puratos's existing nut offerings, such as the recently launched Carat Nuxel Hazelnut. Vör's SQF-certified, dedicated nut facility enhances operational capabilities, while its predominantly US-sourced ingredients improve traceability and lead times to meet growing customer demand. Andy Brimacombe, President of Puratos North America, praised Vör's agility and customer-focused approach, describing the acquisition as a "strong strategic fit." Puratos plans to invest in Vör's equipment and capacity to support continued expansion and meet growing consumer demand for clean-label nut solutions.

Mars Commits US$5 Million to Protect Peanuts Against Crop Losses

Mars, Incorporated has launched the Protect the Peanut Plan, a five-year, US$5 million initiative aimed at safeguarding peanuts against rising threats from pests, disease, and climate variability. Mars is one of the world's top five peanut buyers, purchasing over 136,000 metric tons annually for brands including Snickers and Peanut M&M's. Building on over a decade of research and US$10 million in prior investments, the plan leverages cutting-edge genomics and agriscience to develop hardier peanut varieties. The investments are already showing results: the University of Georgia's Wild Peanut Lab—a long-time Mars partner—has developed more resilient peanut varieties that can thrive in tough conditions, boosting yields by up to 30%. One such variety, Sempre Verde—meaning "forever green"—is now being grown in Brazil and requires no fungicides. Mars also partners with other institutions in the US and Brazil, including the USDA Agricultural Research Service, the HudsonAlpha Institute for Biotechnology, the Brazilian Agricultural Research Corporation (EMBRAPA), and the Agronomical Institute of Campinas (IAC), to develop drought- and disease-resistant peanuts from wild and cultivated species.

Katjes International Acquires UK Healthy Snacking Brand Graze From Unilever

Photo: Katjes International

Katjes International has completed the acquisition of the UK healthy snacking brand Graze from Unilever. The transaction, which was first announced on December 1, 2025, was finalized on February 2, 2026. Through its subsidiary Future Snacks Ltd., Katjes International acquired 100% of the shares in Nature Delivered Ltd., along with the Graze brand, its full product portfolio, and the London production facility, which employs approximately 180 staff. Graze, certified as a B Corp since 2021, is a widely distributed UK healthy snacking brand with a strong presence in grocery retail. The brand complements Katjes International's existing UK portfolio, thanks to overlapping customer bases and distribution channels. Following the successful acquisition of Graze, Katjes International expects to generate revenues of approximately €100 million in the UK in 2026. Managing shareholder Bastian Fassin called Graze a "perfect fit" for the group's European growth strategy.

Hormel Foods and Forward Consumer Partners Join Forces to Grow Justin's Brand

Hormel Foods Corporation and the private investment firm Forward Consumer Partners have completed their previously announced transaction to form a strategic partnership for the US-based Justin's brand, effective at the end of 2025. Under the agreement, Justin's once again operates as a standalone company, 51% owned by Forward and 49% by Hormel Foods. The brand includes popular nut spreads and USDA-certified organic chocolate confections. Founder Justin Gold returns as a strategic advisor and board member, while Peter Burns returns as CEO. Forward's managing partner, Matt Leeds, called Justin's "a beloved brand with incredible potential," highlighting plans to accelerate growth. Hormel's president, John Ghingo, emphasized the partnership as a way to provide the focus and the resources to help the business grow.

New Zealand Nut Spread Brand Fix & Fogg Expands to the UK

New Zealand-based Fix & Fogg has officially launched in the UK, with its Smooth Peanut Butter, Super Crunchy Peanut Butter, and Everything Butter—a functional spread combining eight nuts and seeds—now available on shelves at Whole Foods Market. Further flavors, including Pistachio Butter and Smoke & Fire Peanut Butter, are expected to join the UK lineup later this year. The company said the move responds to years of demand from Kiwis living in the UK. Co-founder Roman Jewell emphasized the brand's mission: "Fix & Fogg was created in Wellington with a very simple idea—to make nut butter that tastes incredible and does good. Bringing that to the UK, with a partner like Whole Foods Market, is a huge milestone for us."

RODRIGO RIVERA RÍO

CHEF AT KOLI
MEXICO

Rodrigo Rivera Río is a celebrated Mexican chef and co-founder of the restaurant Koli in Monterrey, which he opened in 2015 with his brothers Daniel and Patricio. Raised on his family's ranch in Hidalgo, he developed a deep appreciation for local ingredients and rural producers. He honed his skills at the Culinary Institute of Mexico in Monterrey and began his professional career at 21, gaining experience in diverse kitchens before founding Koli. A champion of northeastern Mexican cuisine, he blends traditional ingredients and techniques with creativity and storytelling, transforming local flavors into immersive tasting menus. Under his leadership, Koli has earned multiple awards, including a Michelin star, and is recognized for its seasonal concepts that celebrate the culture, biodiversity, and culinary heritage of Nuevo León.

Photo: Koli.

How did your passion for cooking first emerge, and what inspired you to become a professional chef?

My passion for cooking emerged very naturally at a young age. I grew up surrounded by food as an act of care, memory, and identity. Cooking became a way for me to understand where I come from and to create something meaningful with my hands. Over time, I realized that food had the power to tell stories, connect people, and preserve culture. That understanding inspired me to pursue cooking professionally—not only as a craft, but as a language through which I could express origin, territory, and emotion.

Koli is a family venture. How do you, Daniel and Patricio divide creative responsibilities while maintaining a cohesive vision?

Koli is built on trust and constant dialogue. Each of us has a defined role: Daniel focuses on research, product, and culinary technique; Patricio leads the wine program and the overall dining experience; and I concentrate on narrative, menu structure, and the emotional direction of each season. What keeps us cohesive is a shared philosophy—respect for origin, simplicity, and the belief that food should be honest and powerful. Every decision goes through that common filter.

Koli's concept revolves around seasonal tasting menus, each telling a story. How do you select the theme and ingredients for a new season?

Each season begins with observation rather than recipes. We look at what is happening in our region—climate, harvest cycles, social context, and even personal moments. From there, a central idea emerges, almost like a question we want to explore. Ingredients are chosen not only for flavor, but for their cultural weight and their connection to the territory. The menu becomes a narrative, where each dish is a chapter that contributes to the larger story.

Your tasting menus often highlight local biodiversity. How do you collaborate with producers to showcase unique regional ingredients?

Producers are the foundation of our work. We build long-term relationships with farmers, fishermen, and foragers, visiting them regularly and understanding their processes and challenges. Many ingredients appear on the menu because of conversations, not availability lists. By cooking what they grow or harvest at a given moment, we allow biodiversity to guide creativity, and we make the producer visible through the dish.

How do you use nuts and dried fruits creatively in your cuisine?

Nuts and dried fruits play an essential role in Mexican cuisine, both historically and symbolically. At Koli, we use them not as garnish, but as structure—thickening sauces, adding depth, or creating contrast. In dishes like goat with peanut-based *encacahuatado* or wild fish with pistachio *pipián* sauce, nuts allow us to connect ancestral techniques with a contemporary interpretation. They bring richness, balance, and a sense of continuity with our culinary heritage.

What's next for chef Rodrigo Rivera Río? What can you share with us about your plans for the future?

My focus is on deepening rather than expanding too fast. I'm interested in strengthening projects that honor origin, collaboration, and education—both within Koli and through partnerships with cultural and hospitality groups. Looking ahead, I want to continue exploring how Mexican cuisine can be expressed internationally without losing its soul, while also mentoring younger cooks and supporting producers who sustain our food systems.

QUICK-FIRE ROUND!

What do you enjoy the most about being a chef?

Creating meaningful experiences through food and sharing a table with people.

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

A traditional *pipián*—simple, deep, and full of history.

What is the next big culinary trend?

A return to origin: fewer artifices, stronger connections to territory, and honest storytelling through food.

What nuts or dried fruits are a must-have in your home kitchen?

Peanuts, pumpkin seeds, and pistachios—they are incredibly versatile and deeply rooted in Mexican cuisine.

Striped Bass With Pistachio *Pipián* Sauce

Ingredients:

- 1 kg striped bass
- 300 ml coconut milk infused with kaffir lime
- 100 g fresh cucumber
- 5 bunches chard
- 1 bunch cilantro
- 1 bunch epazote
- 1 bunch hoja santa
- 1 bunch spearmint
- 1 kg tomatillos
- 1 serrano pepper
- 1 poblano pepper
- 300 g pistachios
- 200 g pumpkin seeds
- 150 g sesame seeds

Pipián sauce:

Toast the pistachios, pumpkin seeds and sesame seeds in the oven at 150°C for 10 minutes. Bring a pot of water to a boil. Blanch the herbs for 30 seconds, then transfer immediately to ice water. Cook the peppers and tomatillos in a pot until softened, then set aside. Once all the ingredients have been pre-processed, blend them gradually until a smooth, velvety texture is achieved. Cook the *pipián* in a hot saucepan with a little oil, seasoning with salt to taste.

Striped bass:

Cook the fish in a pan skin-side down only, until the skin is crisp.

Cucumber:

Peel, remove the seeds, and cut into 1 cm cubes.

Plating:

Spread a base of *pipián* in the center of a wide dish. Scatter the cucumber cubes over the sauce, then pour a little coconut milk on top. Place the fish on top and finish with a light sprinkle of salt.

Photo: Koli.

Trade

USA: Supreme Court Strikes Down IEEPA Tariffs; Trump Announces New 15% Global Baseline Rate

On February 20, 2026, the US Supreme Court struck down most of Donald Trump's tariffs, ruling that the President's use of the International Emergency Economic Powers Act (IEEPA) to bypass Congressional authority was unlawful. The decision affects a wide range of levies imposed last year on nearly all US trading partners.

The ruling, however, did not mark the end of Trump's push for tariffs. Shortly after the decision was announced, he issued a presidential proclamation invoking section 122 of the Trade Act of 1974 to impose, as of February 24, 2026, a 10% temporary global import surcharge—essentially a worldwide baseline tariff—for 150 days unless extended by Congress. Less than 24 hours later, Trump announced on social media his intention to raise the worldwide tariff to 15%, through no official proclamation or executive order has yet followed.

The court decision also casts uncertainty over recent bilateral trade agreements, as the IEEPA tariffs had been a key element of leverage wielded by the US during negotiations. Trump's latest tariff actions add a further layer of unpredictability, since the announced global baseline rate of 15% equals or exceeds the tariff ceilings established in various bilateral deals. As reported by Reuters, Trump has warned that he could retaliate with higher duties against any countries that try to back away from their recently negotiated trade deals with the US.

As noted by the *New York Times*, the US Treasury has collected roughly US$240 billion in tariff revenue since April 2, 2025, when Trump unveiled the first and largest round of IEEPA-based tariffs. At the time of this report, it was unclear how or whether importers could seek refunds. As noted by *SCOTUSblog*, a news site dedicated to coverage of the US Supreme Court, the ruling "does not set out a refund mechanism, does not order restitution, and does not address the administrative processes by which duties already paid might be recovered," leaving the mechanics of potential refunds to be sorted out by future legal proceedings.

CHINA: Increased Tariff Rates on Dried Cranberries

China has eliminated the tentative MFN tariff rate previously applied to dried cranberries, thereby increasing the tariff rate on dried cranberries from 15% to 25% as of January 1, 2026, according to a USDA GAIN Report.

CHINA: Zero-Tariff Treatment for 53 African Countries

As of May 1, 2026, China will grant zero-tariff treatment for goods imported from the 53 African countries with which it maintains diplomatic relations, as reported by Chinese state media in February. China will further expand market access for African products by upgrading its "green channel"—a mechanism designed to speed up customs clearance and administrative procedures—as well as other facilitation measures.

INDIA-EU: Free Trade Deal

In January 2026, India and the EU concluded negotiations on a free trade agreement that will be the largest such deal ever concluded by either side. The deal will enable greater market integration between the world's 4th and 2nd largest economies. India will gain preferential access to the EU market across 97% of tariff lines, covering 99.5% of the trade value of its exports to the Union. The EU, in turn, will see tariffs eliminated or reduced on over 92% of tariff lines, covering 97.5% of its exports to India by trade value.

The agreement establishes a framework for cooperation on policies and programs aimed at supporting sustainable, inclusive, healthy, and resilient food systems, while also envisaging environmental protection, climate action, workers' rights, and gender equality. The deal includes commitments on multilateral environmental agreements, forest and biodiversity conservation, and combatting illegal wildlife trade, logging, and fishing. Labor provisions uphold core principles, including freedom of association, elimination of forced and child labor, non-discrimination, and safe working conditions. All commitments are legally binding and enforceable through a structured consultation mechanism.

The EU and India can sign the agreement once the European Council adopts it, with final entry into force after the European Parliament's consent and India's ratification.

MERCOSUR-EU: Future of Trade Deal Uncertain

On January 21, 2026, the European Parliament dealt a blow to the MERCOSUR-EU free trade deal by voting to refer the agreement for review by the European Court of Justice. The European Parliament will continue its examination of the texts, while awaiting the opinion of the court. Only then will Parliament be able to vote to grant consent—or not—to the agreement. This move could significantly delay the finalization of the deal. In February, the European Commission announced that it would apply the agreement provisionally.

NEW ZEALAND-INDIA: Free Trade Deal Reached

New Zealand and India concluded negotiations on a free trade agreement on December 22, 2025. Under the deal, duties will be eliminated on 100% of Indian exports to New Zealand, while 95% of New Zealand's exports to India will be tariff-free or enjoy sharply reduced tariffs.

TÜRKIYE: Increase in Tariffs and Taxes on Imported Walnuts and Almonds

The Turkish government has raised the tariff on imported walnuts from 15% to 20%, and also increased the additional financial responsibility tax to US$451/metric ton for in-shell walnuts, US$1,158/MT for shelled walnuts, and US$1,110/MT for shelled almonds, according to a USDA GAIN Report.

USA: Framework for Tariffs on Countries Trading With Iran

In February 2026, US President Donald Trump signed an executive order establishing a mechanism for placing tariffs on imports from countries that trade with Iran. The order does not identify specific countries or set tariff rates, but instead authorizes US agencies to develop and implement such measures.

USA: Reciprocal Trade Agreements Signed With El Salvador and Guatemala

The US-El Salvador agreement was signed on January 29, 2026, followed by the US-Guatemala agreement on January 30, establishing frameworks for bilateral trade.

Sustainability

EU: First Certification Methodologies Adopted Under Carbon Removals and Carbon Farming Regulation

The European Commission has adopted a delegated regulation establishing the first set of methodologies under the EU's Carbon Removals and Carbon Farming (CRCF) Regulation to certify activities that permanently remove CO_2 from the atmosphere. The new rules cover three types of removal activities: direct air capture with carbon storage (DACCS), biogenic emissions capture with carbon storage (BioCCS), and biochar carbon removal (BCR). The three methodologies set out voluntary rules for permanent carbon removals, defining what counts as a ton of removal, how permanence must be ensured, and how key risks and liabilities are addressed. With the certification framework now in place, carbon removal projects can begin applying for certification. Later in 2026, the Commission is expected to publish delegated regulations for additional certification methodologies, including carbon farming methodologies for activities such as agriculture and agroforestry, peatland rewetting and afforestation. These methodologies could help farmers to obtain result-based payments, complementing their income and supporting them in the transition towards a more resilient production system.

Food Safety

Codex Alimentarius: Revised Code of Practice on Aflatoxin Contamination in Peanuts

In late 2025, the Codex Alimentarius Commission adopted a new version of the *Code of Practice for the Prevention and Reduction of Aflatoxin Contamination in Peanuts*, revised on the basis of new information available on risk management measures to reduce aflatoxins in peanuts.

EU: Turkish Pistachios and US Pistachios Shipped via Türkiye Subject to 50% Aflatoxin Checks

In January 2026, the European Commission published an implementing regulation concerning the temporary increase of official controls and emergency measures governing the entry into the Union of certain goods from certain third countries. Among other measures, the regulation increases aflatoxin checks from 30% to 50% on pistachios, mixtures containing pistachios, and products made from pistachios, either originating from Türkiye or originating from the US and dispatched to the EU from Türkiye.

EU: Commission Declines to Extend French Pesticide Ban to Entire Union

On January 5, 2026, France issued a ministerial order suspending the introduction, import and marketing of plant products containing residues of certain substances not approved for use in the EU. With this, France restricts products that contain certain residues—even if they fall within the EU's maximum residue limits (MRLs). The decree affects, among other substances, thiophanate-methyl, carbendazim and benomyl, in apricots, plums and grapes, among other products. France presented this interim national measure in a meeting of the European Commission's Standing Committee on Plants, Animals, Food and Feed on January 20. The Commission argued that an EU-wide emergency measure was not justified. In the absence of a qualified majority, the Commission decided not to take any action at the EU level, but to continue ongoing actions as planned, including presenting a draft regulation lowering all MRLs for carbendazim, benomyl and thiophanate-methyl.

Rootstock Selection in Pistachio Cultivation: Practical Insights and Future Directions

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Maximizing the natural resilience of pistachio trees starts with choosing the right rootstock. This article aims to provide growers with practical, research-backed insights into how different rootstocks perform in real-world conditions, their efficiency under environmental stress, and the implications of recent advancements in research and breeding for the future of pistachio production.


Photo: Ramesh Katam.

Pistachios are a vital crop in global agriculture, thriving particularly in arid and semi-arid regions where water scarcity limits the cultivation of other tree crops. Their high market value, nutritional benefits, and significant export potential make them an appealing choice for growers around the world. One of the pistachio's most remarkable characteristics is its ability to thrive in saline and drought-prone soils, conditions that would be detrimental to many other crops. To fully capitalize on this resilience, growers need to select the appropriate rootstock. The choice of rootstock has a significant impact on tree vigor, nut yield and quality, disease resistance, and the long-term sustainability of orchards.

Pistachio orchards are typically grafted onto a range of rootstocks, each with its unique characteristics (Table 1). The most used options include *Pistacia vera* (the cultivated pistachio), *P. atlantica* (known for its drought tolerance but with slower growth), *P. integerrima* (grows rapidly but is sensitive to salt), *P. khinjuk* (offers cold tolerance) and UCB1 (a hybrid of *P. atlantica* and *P. integerrima*). Among these, UCB1 has emerged as the premier choice, particularly in California. It seamlessly blends the drought adaptability of *P. atlantica* with the vigorous growth of *P. integerrima*, leading to strong early development and dependable yields even in moderately saline and water-limited conditions.

Multi-year trials have provided compelling evidence of rootstock performance. The growth rate of UCB1 consistently outpaces that of other rootstocks in early trunk diameter and canopy development. Although *P. vera* rootstocks can produce superior nut fill, UCB1 ensures steady commercial yields across varying conditions. UCB1 keeps lower levels of sodium and chloride, showcasing its exceptional capacity for salt exclusion compared to *P. integerrima*. These robust performance metrics enable growers to effectively align rootstocks with their specific orchard environments.

While pistachios have an inherent ability to withstand harsh conditions, different rootstocks display varying levels of resilience to stress. UCB1 has been the focus of extensive research under the combined pressures of salinity and drought. Studies have demonstrated that UCB1 rootstocks increase the activity of antioxidant enzymes, including catalase and peroxidase, under drought conditions, thereby reducing oxidative stress and damage. Under saline stress, these rootstocks exhibit superior ion homeostasis by excluding Na^+ and Cl^- ions, effective osmoregulation through the accumulation of solutes such as proline, and minimized yield loss compared to more vulnerable rootstocks. In scenarios where both stresses coexist, UCB1 exhibits a remarkable ability to maintain nut quality better than more conventional rootstocks.

Among the world's main pistachio producing regions, California has taken the lead in adopting scientifically selected rootstocks, such as UCB1, to optimize yields and uphold international export quality standards. Since its introduction, UCB1 has gained widespread acceptance, thanks to its balanced performance across diverse soils and climates. Growers are reporting increased cumulative yields, earlier fruiting and enhanced economic returns per acre. The selection of rootstock is no longer merely a horticultural choice; it is a strategic investment that must account for environmental stress factors and the demands of quality-driven markets. Table 2 presents the rootstock varieties commonly cultivated in major producing countries.

Table 1

The effects of pistachio rootstocks on vigor, yield, and resistance to biotic and abiotic stresses.

Rootstock	Vigor	Salinity	Yield	Drought	Low temperature	*Phytophthora*	*Verticillium*	RKN	*Armillaria*
P. vera L. 'Badami-Rize-Zarand'	Medium	R	Excellent	R	NA	R	NA	S	NA
P. vera L. 'Ghazvini'	High	R	Good	NA	NA	R	NA	SS	NA
P. vera L. 'Sarakhs'	Low	LR	Good	R	R	S	NA	SS	NA
P. mutica	Low	LR	Weak	R	NA	R	NA	R	NA
P. terebinthus L.	Medium	R	NA	R	R	R	S	R	R
P. atlantica Desf.	High	R	Weak	R	R	R	S	R	S
P. integerrima	High	LR	NA	LR	LR	S	R	NA	S
P. khinjuk Stocks	Low	LR	NA	R	LR	S	NA	S	NA
PGI	High	LR	Medium	NA	LR	NA	R	NA	NA
PGII	High	R	Good	NA	NA	NA	S	NA	S
UCB1	High	R	Excellent	NA	NA	R	R	NA	R

Abbreviations: LR, low resistant; NA, data not available; R, resistant; RKN, root-knot nematode; S, sensitive; SS, semi-sensitive.

Table 2

Rootstock varieties commonly cultivated in major producing countries.

Country	Cultivated Rootstocks
United States	PGI, PGII, UCB1
Iran	*P. vera* cvs. Sarakhs, Badami and Ghazvini
Türkiye	*P. vera, P. khinjuk, P. atlantica, P. terebinthus* and *P. palestina*

The improvement of rootstocks is a dynamic field that combines traditional breeding techniques with advanced technologies. Key strategies in this area include tissue culture and clonal propagation, which produce uniform, disease-free planting materials, critical for ensuring consistency in commercial orchards and accelerating their establishment. Emerging tools such as CRISPR and RNA editing are transforming pistachio breeding by providing precise methods to enhance rootstock traits essential for the sustainability and productivity of pistachio orchards. While CRISPR and genetic engineering are still developing for tree crops like pistachios, they hold promise for improving targeted traits through gene editing. CRISPR enables precise modifications of DNA, allowing for the enhancement of essential characteristics in pistachio rootstocks. Salt tolerance can be improved by targeting genes such as SOS1, NHX1, and HKT1 to enhance the exclusion of Na^+ and Cl^- ions. Drought resistance can be achieved through genes like DREB and AREB, as well as aquaporins, which enhance water-use efficiency under conditions of limited water availability. Disease resistance, especially against *Verticillium* wilt, can be accomplished by editing R genes and PR proteins. Growth regulation can be enhanced to reduce juvenile periods and promote early fruiting by modifying genes such as DELLA proteins and flowering regulators. RNA editing offers a reversible and non-DNA-altering method for modifying gene expression without causing permanent genetic changes, which may help avoid some regulatory barriers associated with genetically modified organisms. Key applications for pistachios include the temporary modulation of stress-response genes to enhance resilience against drought or salinity, as well as fine-tuning flowering timing to align with market demands. Additionally, RNA editing enables the testing of gene functions without making permanent modifications.

Despite its potential, the use of CRISPR and RNA editing technologies in pistachios faces several challenges, including difficulties with tissue culture regeneration, a lack of genomic resources, and varying global regulations regarding gene editing. In the short term, advancements in functional genomics and improvements in tissue culture techniques will establish a strong foundation. In the mid-term, CRISPR-edited rootstocks will begin testing in orchards, along with ongoing RNA editing trials. Ultimately, the long-term goal is to commercially deploy gene-edited rootstocks, resulting in improved resilience to stressors such as drought and disease, as well as optimized orchard management practices.

In conclusion, choosing the right pistachio rootstock is a complex decision that requires a deep understanding of local conditions, long-term orchard goals, and advancements in biotechnology. As climate challenges increase and market conditions evolve, making informed decisions about rootstocks will be vital for developing successful, profitable, and resilient pistachio orchards worldwide. When selecting a rootstock, it is essential to consider factors such as soil composition, water quality, and the target market. UCB1 is a strong and adaptable choice for many semi-arid regions, offering impressive growth and moderate resistance to salinity and drought. Ongoing collaboration among researchers, nurseries, and growers is crucial to ensure that innovations in rootstock technology are effectively translated into real-world applications.

Crop Management Strategies to Control Aflatoxins in Italy's Emerging Peanut Sector: A First Report

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A peanut field in northern Italy. Photo: Matteo Crosta.

Aflatoxin risk in Italian peanuts is minimized through effective crop management practices, especially irrigation. Timely interventions during critical growth stages maintain aflatoxins below EU thresholds, supporting the production of safe, high-quality peanuts.

The integration of nuts into the contemporary Mediterranean diet represents a key resource in promoting the transition to a more sustainable eating pattern, thanks to their richness in plant-based proteins, healthy unsaturated fats, and essential vitamins and minerals. In particular, interest in peanuts, both in their whole-food form and as an ingredient, has risen in recent years as consumers have sought novel sources of plant-based protein.

Within the Italian context, consumption of nuts increased by approximately 40% between 2014 and 2024, reaching around 675,000 metric tons,[1] while peanut demand alone is about 57,000 MT.[2] Since 2020, Italian peanut cultivation has been steadily increasing, with annual production rising from 44 MT to over 700 MT in 2024.[3] Despite this growth, domestic production still falls short of national demand, which continues to be largely met through imports. However, imported peanuts are sometimes affected by aflatoxin contamination, representing a serious food safety concern.

Aflatoxins are toxic metabolites naturally produced by fungi, particularly *Aspergillus flavus* and *A. parasiticus*, which thrive under conditions of high temperature and drought. They are recognized as potent carcinogens, with aflatoxin B_1 (AFB_1) considered the most toxic naturally occurring compound in food.

The development of an Italian peanut supply chain could represent a significant opportunity to offer a product that meets the evolving consumer demand for local, traceable, and high-quality products, while also ensuring high food safety standards. Peanut cultivation in Italy is mainly concentrated in the northern regions, where cases of aflatoxin contamination have been reported in other crops, such as maize.

A key aspect of peanut cultivation is the choice of varieties best suited to local conditions. To date, the most widely cultivated peanut in Italy is Lotos, a variety that has proven highly adaptable to Italian environments. Alongside this well-established cultivar, growing attention is being devoted to the Tripolina, the first Italian variety registered in the European catalogue.[4] Tripolina is distinguished by its smaller, more intensely flavored seeds and possesses considerable potential as a distinctive "Made in Italy" peanut, capable of contributing to the development of

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an independent national supply chain. A third variety, IPG914 (runner type), is also cultivated and has demonstrated the potential to exhibit high productivity.

A recent scientific study[5] was conducted across seven agricultural areas in Italy during the 2022 and 2023 seasons, aiming to assess the safety of Italian peanut production. The results were promising, with AFB_1 either completely absent or found only in trace amounts, always below the EU limit for human consumption of 2 µg/kg.

Effective crop management practices, especially irrigation, proved to be crucial for maintaining these safe levels. In 2022, hot and dry conditions forced farmers to irrigate their fields up to six times in some areas to ensure that the plants received enough water to grow strong and healthy. In contrast, in 2023, milder temperatures and sporadic rainfall led to reduced irrigation, resulting in a slight increase in *A.* section *Flavi* incidence and AFB_1 levels. These findings underscore a key aspect of peanut cultivation: the occurrence of water stress during critical stages, such as flowering and pod filling, makes peanut plants more vulnerable to fungal infection and aflatoxin contamination. Italian peanut producers examined in the study appeared to manage this aspect very effectively, with farmers compensating for climatic variations through timely irrigation.

The integration of novel technologies has the potential to help farmers in monitoring crops and optimizing agronomic practices, including irrigation and harvest time, thereby improving crop management. One of the most innovative strategies involves the use of Sentinel-2 satellite imagery to evaluate vegetation indices, such as the Normalized Difference Vegetation Index (NDVI) and the Normalized Difference Moisture Index (NDMI), which reflect plant canopy conditions and overall plant health. The Italian study demonstrated a correlation between these indices and aflatoxin occurrence, offering a promising indication of the efficacy of this approach. It was determined that measurements taken during the flowering stage, when the peanut plant begins its reproductive stage and is most susceptible to *A. flavus* infection, were particularly informative. In particular, the NDVI, which is associated with the vigor of the crop, showed a moderate-to-strong correlation with AFB_1 at flowering ($r = 0.68$). Similarly, the NDMI, which is connected to leaf water content, exhibited a comparable correlation at the pod development and filling stage ($r = 0.64$). Although the correlations were moderate, they suggest that remote sensing could become an effective early-warning tool, months in advance of the harvest, enabling farmers to detect physiological stress and adjust irrigation strategies before contamination risk increases.

The risk of aflatoxin contamination is also significant in the post-harvest stage if inadequate management practices are employed. This is particularly relevant because aflatoxin production mainly occurs when the water activity of the fruit decreases but is not yet low enough to completely inhibit fungal growth. In Italy, as observed in other crops, optimized handling, drying, storage, and processing, often following Integrated Pest Management (IPM) principles, ensure that peanuts harvested in optimal conditions remain safe throughout the entire supply chain, resulting in a high-quality final product.

Thanks to its strong post-harvest management, careful agronomic practices, rigorous safety controls, and varieties adapted to local conditions, the Italian peanut supply chain has the potential to grow significantly. Moreover, by investing in innovation and integrating modern decision-support tools, the emerging Italian peanut sector can become a model of excellence.

Peanut plant ready for harvest.
Photo: Matteo Crosta.

Peanut pod of the Tripolina variety.
Photo: Matteo Crosta.

Brown Marmorated Stink Bug Infestation and Management in Türkiye

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The brown marmorated stink bug (BMSB) is an invasive insect pest that has emerged as a significant agricultural threat in Türkiye. Its most pronounced economic impact to date has been observed in hazelnut production. This article reviews the spread and impact of the BMSB in Türkiye and outlines current management efforts.

Figure 1

Adult brown marmorated stink bugs on hazelnut fruit in Türkiye. Photo: Celal Tuncer.

The BMSB (*Halyomorpha halys*) is an invasive insect that has spread from its native range in East Asia (China, Taiwan, Japan, and Korea) to many countries worldwide, particularly over the past two decades. Following its arrival in new regions, the BMSB rapidly established high population densities and became one of the major agricultural pests in several countries. The BMSB is a highly polyphagous species, feeding on hundreds of host plants, including fruits, nuts, vegetables, field crops, ornamental plants, and non-crop species. Both adults and nymphs cause significant crop damage by piercing plant tissues and sucking plant fluids, resulting in reduced yield and quality. Although the BMSB can feed on various plant parts, its most severe damage generally occurs on fruits. Feeding injury leads to tissue damage, discoloration, necrosis, and chlorotic areas, rendering fruits and other products unmarketable. Consequently, substantial economic losses have been reported in many BMSB-infested countries. In addition to its agricultural impact, the BMSB is a significant nuisance pest for homeowners due to the unpleasant odor it emits. In autumn, large numbers of adults invade homes and other human-made structures to overwinter. Most affected countries now implement integrated pest management (IPM) against the BMSB, combining short-term chemical and mechanical control with biological strategies —particularly the release of egg parasitoids—for long-term suppression. The BMSB was first detected in Türkiye in 2017 and subsequently became a serious concern for farmers, especially hazelnut growers, after establishing stable populations (Figure 1).

Distribution and Current Pest Status of BMSB in Türkiye

Since its initial detection in Istanbul and Artvin Province in 2017, the BMSB has become well established in Türkiye. It has spread to numerous provinces, particularly in the Black Sea, Marmara, and Aegean regions, with occasional detections in southern provinces. As of 2025, the BMSB has been recorded in 41 provinces, encompassing all of Türkiye's hazelnut-producing areas (Figure 2). Owing to its economic damage and nuisance behavior, the BMSB has become one of the most publicly recognized pests in Türkiye. BMSB population density is highly heterogeneous, even among different districts within the same province. The highest population densities are currently observed along the Black Sea coastline, likely due to favorable climatic conditions and the location of the initial infestations. Despite its continuous spread and wide host range, the most severe economic damage in Türkiye is currently seen in hazelnut orchards along the Black Sea coast. Hazelnut is the region's most economically important crop, covering approximately 700,000 hectares and accounting for about 65% of global hazelnut production. The economic value of hazelnut has made it a primary focus of BMSB management and research efforts. In 2023 and 2024, substantial kernel damage significantly reduced hazelnut market value in certain locations, leading to heightened public concern regarding BMSB infestations. In 2025, however, severe frosts caused widespread yield losses in hazelnut orchards, largely overshadowing BMSB-related damage. Nevertheless, increasing populations of the BMSB, together with indigenous stink bug species, have contributed to elevated kernel damage in Turkish hazelnut orchards. Nationwide data from hazelnut processing facilities—including damage ratios across multiple years and locations—may provide valuable insights into the actual contribution of the BMSB to overall damage levels.

Figure 2

Brown marmorated stink bug (*Halyomorpha halys*) population density in 2025

Studies indicate that the BMSB can complete one full generation per year in Türkiye and may produce a partial second generation in some years. This second generation typically emerges after the hazelnut harvest and is therefore considered to have limited economic impact. However, due to its high mobility and broad host range, the BMSB frequently moves among different host plants, causing damage to a variety of crops. In infested areas, crops such as corn, kiwifruit, persimmon, apple, cherry, peach, grape, tomato, and pepper are considered at risk, although large-scale economic impacts beyond hazelnuts have not yet been widely reported.

Management of BMSB in Türkiye

The Turkish Ministry of Agriculture and Forestry has implemented a comprehensive IPM-based action plan against the BMSB. Each year, several thousand pheromone traps are deployed nationwide to monitor population density, seasonal dynamics, and the expansion of BMSB distribution during the growing season. For long-term control, classical biological control using the egg parasitoid samurai wasp (*Trissolcus japonicus*) has been adopted. The parasitoid was first imported from Italy in 2022 and subsequently mass-reared at the Black Sea Agricultural Research Institute. Initial releases began in 2023, with approximately 22,000 wasps released in the central and eastern Black Sea regions. In 2024, releases expanded to around 207,000 wasps across 33 provinces. In 2025, the Hazelnut Research Institute in Giresun and the Agricultural Pest Control Research Institute in Ankara initiated additional rearing programs. In total, approximately 1,150,000 samurai wasps were released across 40 provinces in that year. The Ministry plans to expand parasitoid rearing capacity and continue conducting releases in BMSB-infested areas in the coming years.

During the overwintering period (September–April), mechanical control measures, including the collection and destruction of aggregated adults in homes and warehouses, are widely practiced. In some provinces, biocidal products are also applied to overwintering adults in homes, warehouses, and similar structures. In addition, pheromone traps are employed to a limited extent for mass trapping and attract-and-kill strategies. Substantial damage recorded in key hazelnut-growing provinces after 2023 prompted increased use of chemical control measures by farmers against the BMSB. Recent increases in hazelnut market prices have further encouraged the adoption of such measures. During the growing season, farmers typically apply insecticides two to five times from May until the harvest.

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Country/Product Spotlight

Pecans & USA

This edition is the 19th in our series of industry and market overviews in *Nutfruit* magazine. This report provides a snapshot of the US pecan industry, with data, analysis, and trends.

We would like to thank the American Pecan Council for their collaboration on this edition.

Industry Highlight

The US Pecan Industry in Numbers

129,500 MT
in-shell production
2025/26 estimate

176,400 ha
total planted area

26,900 MT
in-shell exports
average 2020/21-2024/25

45,300 MT
shelled exports, in-shell equivalent
average 2020/21-2024/25

16,000 MT
in-shell imports
average 2020/21-2024/25

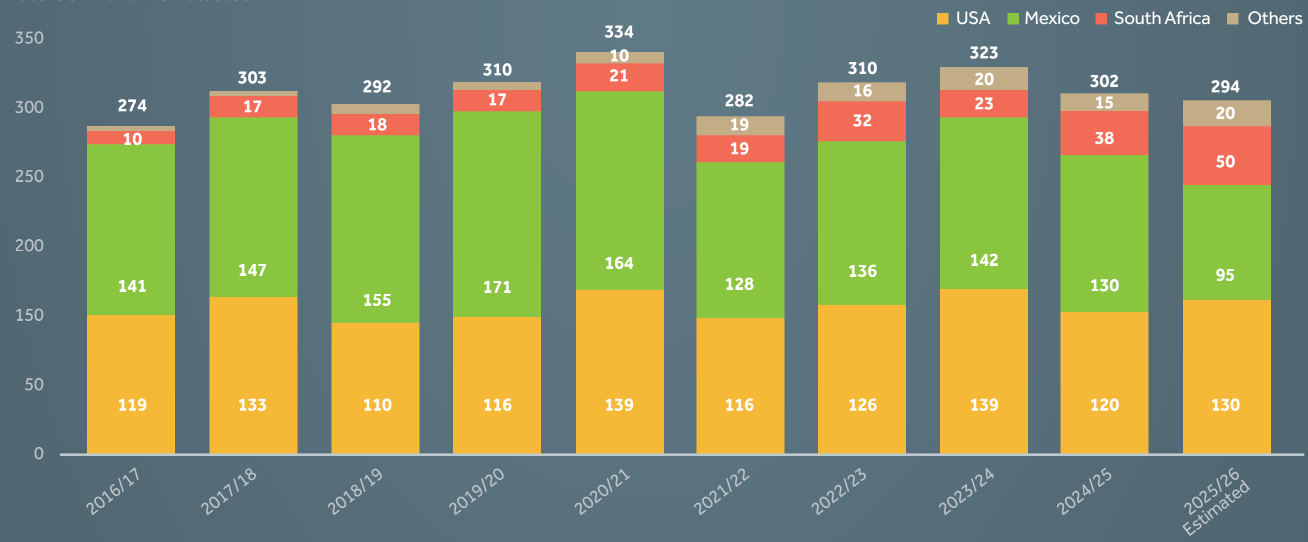
89,300
shelled imports, in-shell equivalent
average 2020/21-2024/25

In-shell equivalent calculated using a kernel to in-shell ratio of 0.5.

Production

The pecan (*Carya illinoinensis*) is the most valuable native North American nut crop.[1] Over the last decade (2016/17-2025/26), the United States and Mexico accounted for 88% of the world's annual pecan production, on average (Figure 1). While Mexico has expanded production rapidly over the past two decades, the US has historically led global pecan output, supported by a combination of long-established orchard systems, breeding programs for improved cultivars, and increasing investments in orchard management and post-harvest handling.

Figure 1. World Pecan Production, 2016/17-2025/26 (1000 Metric Tons, In-shell Basis).
Sources: USDA and INC Database.



Commercial pecan orchards in the US began in the 19th century with open-pollinated seedlings of variable yield and quality. Around 1900, vegetative propagation gained popularity, enabling the planting of superior varieties with higher productivity and better nut quality. Advances in tree selection, controlled pollination, grafting and rootstock improvement have since shaped modern pecan production and led to the development of today's leading varieties.[1]

Pecan is grown in a wide range of environments across the southern US, spanning from California to Virginia, requiring cultivars adapted to local conditions and differential orchard management.[1] The main producing states are New Mexico, Georgia and Arizona.[2]

Total US production between 2016/17 and 2025/26 averaged 125,000 metric tons (in-shell basis) or 61,000 MT (kernel basis) and accounted for 41% of global supply. Interannual variability responds to production challenges related to the impact of diseases, drought and hurricanes on the Gulf Coast.[1] Additionally, production exhibits year-to-year variability, driven by alternate bearing.[3] These factors help explain the fluctuations observed in US production (Figure 1) despite longer-term gains linked to genetic improvement and modernization.

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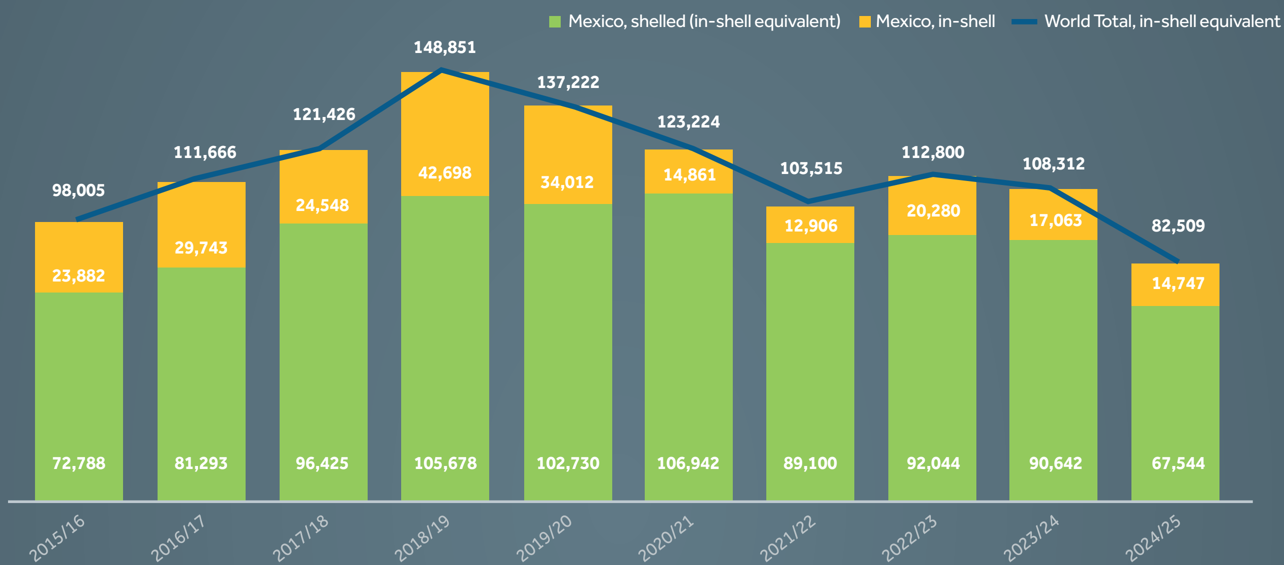
Trade

IMPORTS: The US and Mexico pecan supply chains and trade flows are closely interconnected. Over the past decade, Mexico has shipped an average of 80% of its pecan crop to the US. This steady inflow supports the expansion of the US pecan sector and contributes to supplying both domestic consumption and export markets. Throughout the entire decade, Mexico clearly dominated US pecan imports, consistently accounting for nearly 100% of total volumes, while shipments from other origins remained marginal. Shelled imports represent the most significant share of total imports, while in-shell shipments have shown greater variability (Figure 2). Overall, the data highlights the strong integration of the US pecan market with Mexican supply, reflecting the close trade relationship and complementary production dynamics between the two countries.

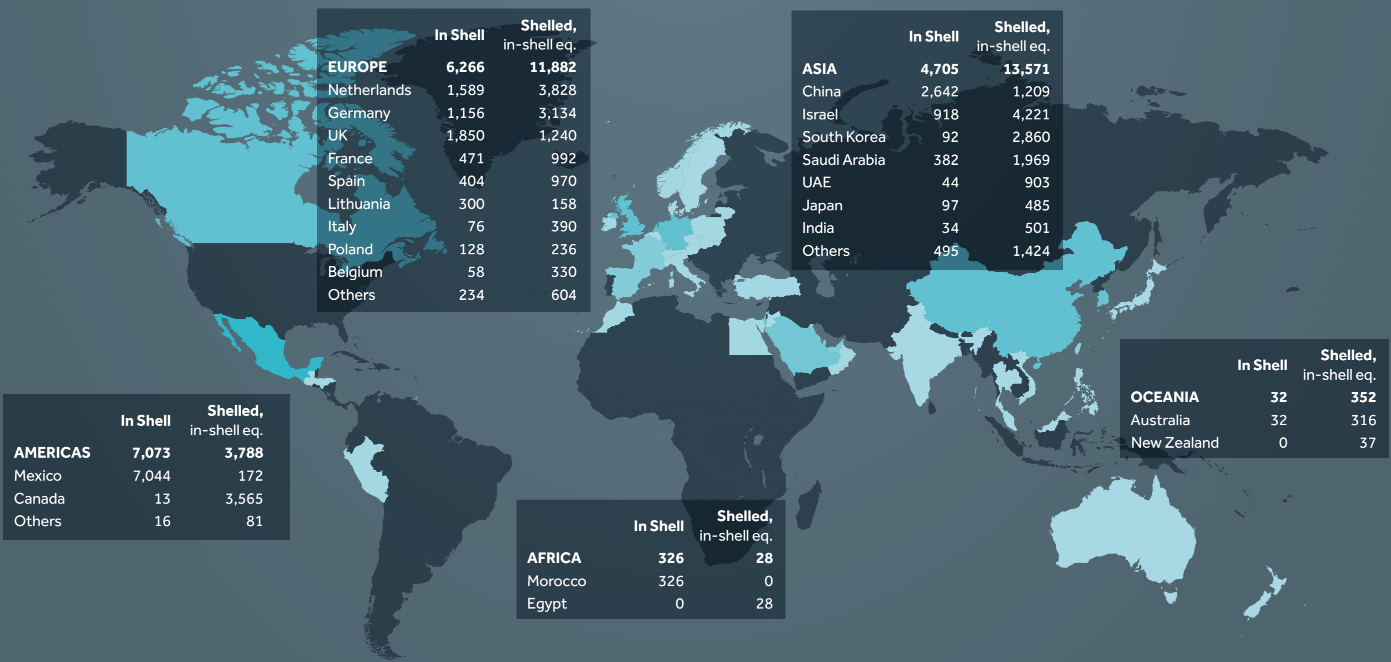
Figure 2. Global US Imports of Pecans (Metric Tons, In-shell Equivalent, 2024/25, October 1-September 30).

Shelled transformed to in-shell equivalent; kernel to in-shell ratio 0.5.
Source: U.S. Department of Agriculture (USDA), Foreign Agricultural Service (FAS), Global Agricultural Trade System (GATS).



EXPORTS: Over the last decade, US pecans (in-shell and shelled) were exported to 94 destinations worldwide, with shipments reaching 57 different markets in 2024/25 (Figure 3).

Figure 3. Global US Exports of Pecans by Destination
(Metric Tons, In-shell Equivalent, 2024/25, October 1-September 30).



	In Shell	Shelled, in-shell eq.
EUROPE	**6,266**	**11,882**
Netherlands	1,589	3,828
Germany	1,156	3,134
UK	1,850	1,240
France	471	992
Spain	404	970
Lithuania	300	158
Italy	76	390
Poland	128	236
Belgium	58	330
Others	234	604

	In Shell	Shelled, in-shell eq.
ASIA	**4,705**	**13,571**
China	2,642	1,209
Israel	918	4,221
South Korea	92	2,860
Saudi Arabia	382	1,969
UAE	44	903
Japan	97	485
India	34	501
Others	495	1,424

	In Shell	Shelled, in-shell eq.
OCEANIA	**32**	**352**
Australia	32	316
New Zealand	0	37

	In Shell	Shelled, in-shell eq.
AMERICAS	**7,073**	**3,788**
Mexico	7,044	172
Canada	13	3,565
Others	16	81

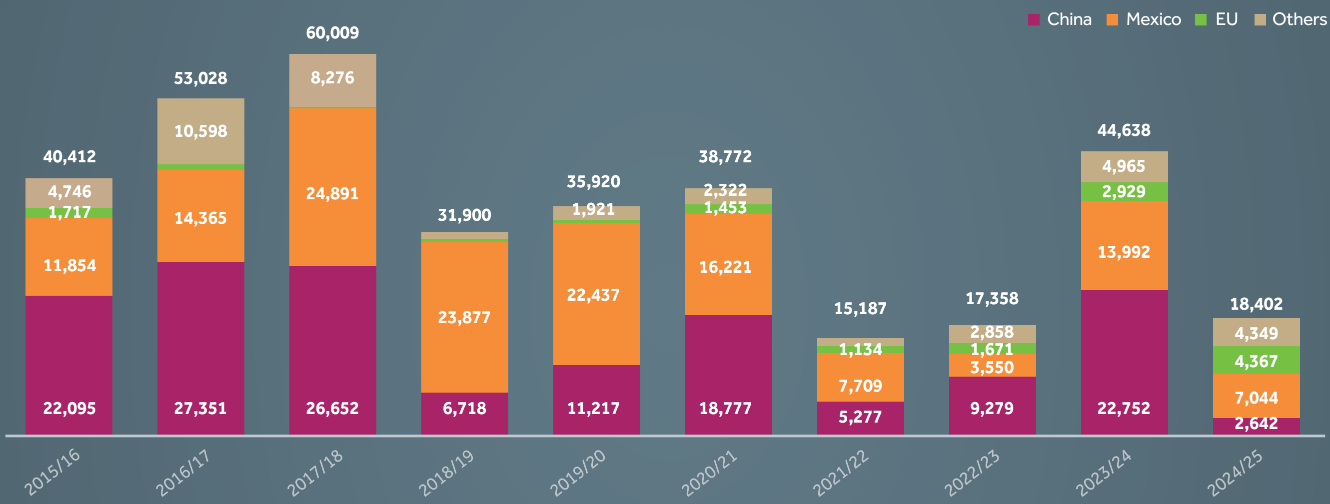
	In Shell	Shelled, in-shell eq.
AFRICA	**326**	**28**
Morocco	326	0
Egypt	0	28

Shelled transformed to in-shell equivalent; kernel to in-shell ratio 0.5.
Source: U.S. Department of Agriculture (USDA), Foreign Agricultural Service (FAS), Global Agricultural Trade System (GATS).

In-shell exports ranged from around 15,200 MT in marketing year 2021/22 (October 1-September 30) to 60,000 MT in 2017/18. Over the last ten years, Mexico and China have alternated as the leading destination markets. Shipments in 2024/25 amounted to 18,400 MT, with Mexico being the main destination, accounting for 38% of the share, followed by China, with 14% (Figure 4).

Mexico serves as a key shelling hub for US pecans, largely due to its lower labor costs and its logistical proximity between pecan-growing areas in the southwestern US and northern Mexico. After processing, a substantial share of these shelled pecans is shipped back to the US for domestic distribution or re-export. Over the analyzed period, exports of in-shell pecans to Mexico have been consistently significant, with notable fluctuations but a broadly stable role in the export structure. In-shell shipments varied between 3,600 MT in 2022/23 and 24,900 MT in 2017/18, easing to around 7,000 MT in 2024/25. In relative terms, Mexico has typically been the second-largest destination for US pecans after China. Its share peaked at about 75% in 2018/19, when shipments to China dropped sharply (Figure 4).

Figure 4. Global US Exports of In-shell Pecans by Destination (Metric Tons, 2024/25, October 1-September 30).
Source: U.S. Department of Agriculture (USDA), Foreign Agricultural Service (FAS), Global Agricultural Trade System (GATS).



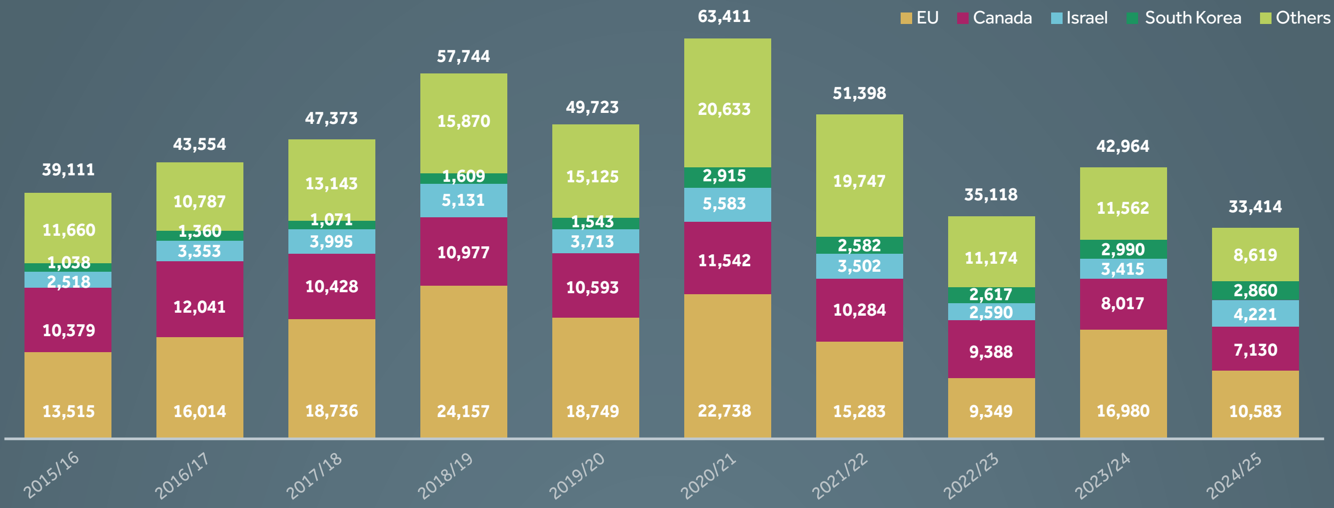
Shipments to China (including Hong Kong and Taiwan) were strong between 2015/16 and 2017/18, peaking at over 27,000 MT. From 2018/19 onward, volumes declined, reflecting the impact of US-China trade tensions. More recently, China's antidumping investigations into pecans from the US and Mexico have further hampered exporting potential (Figure 4).

Exports of in-shell pecans to the EU have remained relatively small but show a clear upward trend in recent years. Shipments were modest and fairly stable between 2015/16 and 2019/20, generally below 2,000 MT. Volumes increased from 2020/21 onward, reaching around 2,900 MT in 2023/24 and rising to about 4,400 MT in 2024/25—the highest level of the period. While the EU accounted for only a minor share of total exports for most of the decade, typically between 1% and 7%, its importance increased recently, climbing to about 24% in 2024/25, reflecting both higher shipments and a reduced concentration in other markets, particularly China (Figure 4).

Over the past decade, total US exports of shelled pecans peaked in 2020/21 at around 63,400 MT (in-shell equivalent), following steady growth from 39,100 MT in 2015/16, before declining to between 33,400 MT and 51,400 in the last few years (Figure 5).

Figure 5. Global US Exports of Shelled Pecans by Destination
(Metric Tons, In-shell Equivalent, 2024/25, October 1-September 30).

Shelled transformed to in-shell equivalent; kernel to in-shell ratio 0.5.
Source: U.S. Department of Agriculture, Foreign Agricultural Service's Global Agricultural Trade System (USDA FAS GATS).



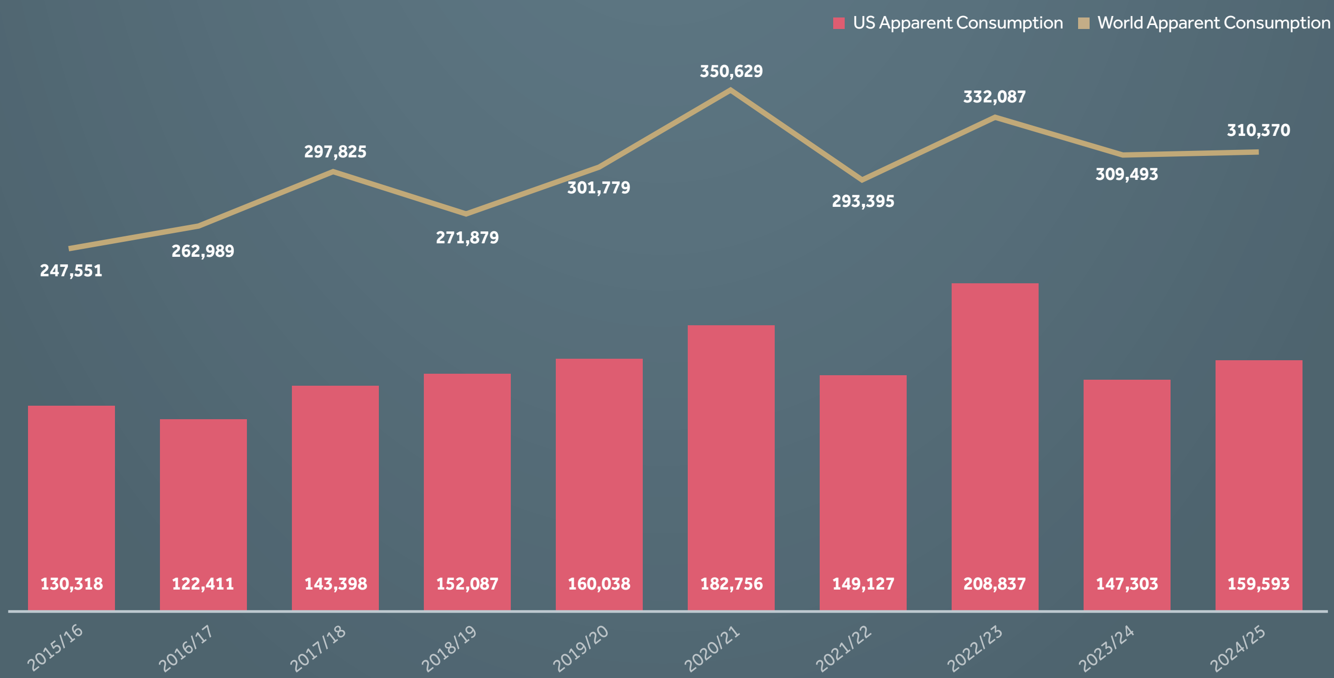
The EU has shown a relatively strong and at times expanding presence. Shipments increased from 13,500 MT in 2015/16 to a peak of 24,200 MT in 2018/19 and varied between 9,300 MT and 22,700 MT during the last half of the decade. Canada has remained a consistently important market, with shipments ranging between roughly 7,100 MT and 12,000 MT. Israel has remained a mid-sized but steady destination, with volumes fluctuating between about 2,500 MT and 5,600 MT, while exports to South Korea were comparatively modest but gradually increased over time.

Domestic Consumption

US apparent consumption followed a broadly upward trajectory up to 2020/21, rising from 130,300 MT in 2015/16 to a decade high of 208,800 MT in 2022/23. Over the same period, the US consistently represented a substantial share of global apparent consumption, accounting for roughly 47-63% of the total, underscoring the country's central role in the global pecan market. Both the world and the US series show cyclical movements linked to crop size and trade dynamics (Figure 6).

Figure 6. Apparent Consumption of Pecans
(Metric Tons, In-shell Equivalent, 2020/21-2024/25, October 1-September 30).

Kernel to in-shell ratio 0.5.
Sources: INC and U.S. Department of Agriculture (USDA). Prepared by the INC using monthly trade data from the USDA Foreign Agricultural Service's Global Agricultural Trade System (USDA FAS GATS).



Pecans and the Health of the Land

Consumers are increasingly concerned about the environmental impacts of food production. As a long-lived, perennial crop, pecan trees offer many advantages like carbon sequestration and biodiversity. One of the greatest environmental benefits of pecan orchards is their effect on soil quality.

Photo: American Pecan Promotion Board.

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The quality of soil is frequently taken for granted. This is probably because soil quality can be hard to see with the naked eye. In their native environment, along the rivers of east-central Texas into Mexico and throughout the Mississippi River valley and its tributary streams, pecan trees prefer soils that are high in organic matter, drain well, and are frequently refreshed with a pulse of nutrients in the seasonal flooding of bottomland ridges.

Some of the beneficial soil quality conditions in the pecan's native range are a by-product of pecan trees themselves. Pecans have a long lifespan, capable of exceeding 100 years of age. They are grown over a wide geographic area, under a host of soil and environmental conditions. Fortunately, pecans are highly adaptable trees. Most commercial pecan orchards are planted on land that was formerly in row crop production or pasture. Just as we see in its native environment, the pecan tree enhances soil quality in agricultural systems over time. This all begins with soil organic matter (SOM). A fertile soil is the basis of a healthy civilization and SOM is the foundation of healthy and productive soils. SOM consists of living organisms, fresh residues, and well-decomposed residues. Though it typically comprises only 1-6% of an agricultural soil, SOM has an overwhelming effect on almost all soil properties, and thus, the health of the land.

As limbs break and leaves fall each year, as bark is sloughed off over time, and as pecan shucks decompose on the orchard floor, portions of this organic matter are returned to the soil in a constant flow of nutrients back and forth between the soil and the trees. Soil organic matter is significantly improved in pecan orchard systems compared to row crop fields within four years of tree planting and over time SOM is enhanced further with tree age. There may be variations in organic matter from one location to the next related to microbial activity as influenced by variations in temperature and/or rainfall. But even in warm and wet climates, where SOM decomposes rapidly, SOM levels are increased by as much as 137% in pecan orchards compared with conventionally farmed row crop fields from the same region.[1]

Higher levels of organic matter in pecan orchards are the result of the accumulation of plant biomass that is returned to the soil each year. Pecan husks alone account for 25-30% of the total mass of the pecan fruit.[2] These husks dry out and fall to the orchard floor each growing season, bringing a considerable amount of plant material back to the soil. Decomposition of leaves and woody plant debris on the orchard floor along with orchard soils being left uncultivated also contribute to the increased levels of organic matter observed in pecan orchards.

Along with SOM, various measures of soil microbial activity are higher in orchards than in row crop fields. Along with increasing SOM, soil microbial activity increases with orchard age. Soil microbes are essential for keeping plants well supplied with nutrients through the breakdown of SOM. Some soil bacteria even fix nitrogen gas from the atmosphere, making it available for plants. This is observed in many pecan orchards where clover or other legumes are used as a winter cover crop or grown perennially on the orchard floor. Other microorganisms dissolve minerals and make important nutrients like phosphorus more available for plants. Greater microbial activity such as that which we see in pecan orchard soils reduces the need for nutrient fertilizer inputs by farmers and ensures that fewer potentially harmful organisms will be able to reduce crop yield.[1]

Aggregate stability also significantly increases in orchard soils with orchard age. This is important because it helps the soil to strike the appropriate balance between drainage and water-holding capacity. This improves plant water availability and reduces runoff and erosion, making trees in the orchard more resilient.

The increased SOM in pecan orchards also has important implications for the chemistry of the soil in the form of cation exchange capacity. Many essential plant nutrients exist in the soil as positively charged molecules called cations. SOM improves the ability of the soil to hold onto these cations in a way that keeps them available to plants. This ability is measured via cation exchange capacity (CEC). As organic matter increases, so does CEC. Pecan orchards exhibit a much higher CEC with age compared to row crop fields. This further enhances nutrient availability of important nutrients like potassium, calcium, and magnesium, reducing the need for heavy inputs by producers.

Pecans also help to scavenge nitrogen from the soil at greater soil depths than do row crops. The deep, spreading root system of the pecan tree captures nitrogen as it gradually leaches down, resulting in lower rates of leaching below the root zone and into the water table.

Taken together, the many enhancements of soil by pecan trees are good news for the pecan industry and provide a good message for consumers about the sustainability and potential environmental benefits of pecan production. Pecan trees not only hold soil in place, enhance the fertility and nutrient availability of the soils on which they grow, but they are actually building soil over the course of their remarkably long lives. Soil quality of land previously used for conventional row cropping systems can be significantly improved by pecan orchard establishment and can further improve with orchard age. These same environmental enhancements benefit the producer by lowering production costs, potentially leading to increased profit margins.

Pecans: Nutrient-Rich Nuts for Health and Wellness

Pecans are increasingly recognized as a nutritional powerhouse, offering a broad array of healthy fats, essential vitamins and minerals, and health-promoting antioxidants. With their nutrient-dense profile and rich, buttery flavor, pecans have long been valued as a versatile ingredient in both sweet and savory dishes, and they also make an ideal choice for a wholesome, nourishing snack.

Nutritional Profile

Pecans are high in monounsaturated fat, which may help reduce cardiometabolic risk factors.[1, 2] The most abundant fatty acid in pecans is oleic acid[3] —the same heart-healthy fat found in olive oil. A standard 30-gram serving of pecans provides 18 grams of unsaturated fat and just 2 grams of saturated fat.[4] Pecans also supply plant-based protein and are naturally high in dietary fiber,[1] making them a convenient and nutritious snack.

Beyond macronutrients, pecans contain a wide range of vitamins and minerals. They are high in vitamin B_1—which contributes to the normal heart function—as well as magnesium, phosphorus, zinc, manganese and copper. Pecans are also a good source of vitamin B6, iron and potassium, adding to their well-rounded nutrient profile.[1]

Heart Health

Decades of clinical research have established the role of pecans in supporting cardiovascular health. A comprehensive review[3] of human trials indicates that regular pecan consumption consistently leads to improvements in lipid levels. Studies involving adults with metabolic risk factors have found that daily pecan intake—ranging from 30 g to 68 g—results in significant reductions in total cholesterol, LDL ("bad") cholesterol, and triglycerides. Research has also shown that pecans may enhance postprandial lipid metabolism—the way the body processes fats immediately after eating—with various studies reporting lower triglyceride responses after a pecan-enriched meal compared to control groups.[3]

Diabetes Management

Clinical research has found that pecans can play a role in managing markers related to glycemic control and insulin sensitivity. A trial involving adults who were overweight or had central obesity reported that incorporating pecans into the diet led to measurable improvements in insulin concentrations and beta-cell function.[2] Furthermore, substituting typical isocaloric foods with pecans has been shown to lower postprandial glucose levels—the sugar response immediately following a meal.[5]

Weight Management and Satiety

Although pecans are packed with nutrients, clinical evidence suggests that they have a neutral effect on body weight when included as part of a healthy, balanced diet. This "weight neutrality" may be partly explained by the nut's ability to promote a feeling of fullness, helping to regulate appetite throughout the day. Trials have shown that pecan consumption may increase the secretion of satiety-related hormones, such as peptide YY and cholecystokinin, while suppressing ghrelin, the hormone responsible for hunger signaling.[3]

Diet Quality

Incorporating pecans into a daily routine has been shown to significantly enhance overall diet quality, a key component of long-term health. According to studies based on Healthy Eating Index criteria, replacing typical processed snacks with a daily helping of pecans resulted in a significant increase in total diet quality scores over a 12-week period.[6, 7]

Antioxidant Activity

Pecans are characterized by a diverse array of bioactive phytochemicals, including polyphenols such as ellagitannins and proanthocyanidins, alongside gamma-tocopherol, a unique form of vitamin E. Clinical observations indicate that pecan consumption acutely increases plasma antioxidant capacity within hours of intake.[3]

Emerging Research

Recent studies have begun to explore the potential benefits of pecans for cognitive performance and gut health. In one trial, participants who consumed a pecan-enriched meal showed improved performance on tests of attention, processing speed, and memory compared to the control group.[8] Additionally, early research into the gut microbiome suggests that the fiber and polyphenols in pecans may support microbial diversity and intestinal health.[9]

Conclusion

Pecans are a versatile and nutrient-dense addition to a modern healthful diet. Incorporating a daily handful offers a simple, natural way to boost the intake of essential vitamins and minerals, healthy fats, and antioxidants that support long-term wellness.

HIGH IN

- Monounsaturated fat
- Fiber
- Vitamin B_1
- Magnesium
- Phosphorus
- Zinc
- Manganese
- Copper

SOURCE OF

- Vitamin B_6
- Iron
- Potassium

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Pecan Nut Cookies

Ingredients:

- 90 g dates
- Hot water
- 90 g pecan nuts
- 50 g peanuts
- 1 egg
- 50 ml olive oil
- 150 g oat flour
- ½ tsp cinnamon
- 1 tsp baking powder

To decorate:

- 12 pecan nuts
- 5 g maple syrup or honey
- Salt flakes

Preparation:

1. Prepare a date paste by pitting the dates and hydrating them for about 10 minutes in hot water. Drain, reserving a small amount of the soaking water, and blend until smooth.
2. Finely chop the pecans in a food processor. Pulse the peanuts briefly so they are more coarsely chopped, and set aside.
3. In a large bowl, whisk together the egg, date paste and oil. Add the dry ingredients: chopped pecans, oat flour, cinnamon and baking powder.
4. Mix everything well, then fold in the peanuts using a spatula. Let the dough rest for 15 minutes.
5. Preheat the oven to 180°C.
6. Roll the dough into small balls and gently flatten them. Arrange on a baking tray lined with parchment paper, place a pecan half on each cookie, brush with a little maple syrup or honey, and finish with a pinch of salt.
7. Bake for 9 minutes, remove from the oven, and allow the cookies to cool.

Tip:

The shaped, unbaked dough can be frozen in a zip-top bag without any decoration. Add 3-5 minutes to the baking time and bake straight from frozen—no need to thaw.

New Product Launches

Renowned for their rich, buttery flavor, irresistible crunch and surprising health benefits, pecans are a favorite ingredient in both sweet and savory creations. Their natural sweetness and distinctive texture bring depth, sophistication, and a touch of indulgence to everything from desserts to savory dishes. Celebrated by chefs and sought after by consumers, pecans are inspiring inventive new products and fresh flavor experiences. Here's a look at some of the most exciting pecan-based launches making waves in today's marketplace.

Starbucks Pecan Oatmilk Cortado

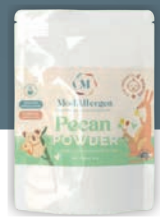
USA

Three shots of espresso, steamed oat drink, and notes of pecan, brown butter and baking spices, plus a pecan crunch topping.

Harrods All-Butter Date and Pecan Biscuits

UK

The ideal accompaniment to mid-morning tea or coffees, these biscuits boast the naturally sweet pairing of chunky pecans and decadent dates.



ModAllergen Pecan Powder

Australia

This fine-milled organic pecan powder is designed to be integrated into purees to introduce babies to pecans at an early age.

Wanderlands Mineral Creek Wilds Snack Mix

USA

New Mexico pecans, pepitas and black sesame seeds, flavored with Hatch chiles, habaneros, apple cider vinegar, carrots and corn.

Halva Kingdom Pecan Halva

Israel

This premium halva is perfect for elevating desserts, enhancing breakfast dishes like oatmeal or yogurt, or simply enjoying on its own.

PKN Zero Pecanmilk

USA

This dairy-free, gluten-free, additive-free pecan drink is simple—just lightly roasted, stone-ground pecans, vanilla, and sea salt.

Amoretti Pecan Compound

USA

Add the luscious, buttery taste of pecans to cakes, muffins, pies, mousses and more with this delectable pecan compound.

Proof Pecan Cocktail Syrup

Canada

Freshly roasted Georgia pecans are blended into bitters to create this irresistible syrup that mixes equally well with whisky or rum.

The Art of Pecan Pure Pecan Oil

USA

With its high smoke point and an outstanding flavor profile, this pecan oil is a terrific health-conscious substitute for butter.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Fisher organic
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NET WT 16 OZ (1 LB) 453g
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Nut Consumption and Sarcopenia: Can a Daily Handful Help Protect Your Muscles?

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A daily handful of nuts can be a small habit with big potential. As sarcopenia—the age-related gradual loss of muscle strength and function—rises worldwide, nutrition matters. Nuts provide a unique combination of plant protein, unsaturated fats, and essential minerals that may support muscle health, especially when paired with strength-building activity.

Sarcopenia is often a quiet, gradual change. You may notice slower walking or poorer balance, or that climbing stairs and carrying bags feel harder than before. This is not only about appearance; it is about independence.[1,2] Muscle strength is essential for standing up from a chair, stabilizing joints, recovering after illness, and reducing the risk of falls.[2] Sarcopenia becomes more common with age, but modern life can speed it up: long hours sitting, irregular sleep, chronic stress, and diets that fill the stomach without supplying enough protein and key micronutrients.[3]

The encouraging news is that muscle remains responsive throughout life. With regular resistance exercise and enough protein intake, strength can improve at almost any age. Nutrition cannot replace strength training, but it makes training and recovery easier. This is where nuts become especially interesting: they are convenient, widely available, and nutrient-dense.[4]

As a group, nuts provide plant protein, unsaturated fats, fiber, minerals such as magnesium and selenium, and antioxidant compounds like vitamin E and many polyphenols. Even if nuts are not the highest-protein food on your plate, they can help you reach your daily total protein intake and dietary recommendations, especially when they replace low-quality snacks.[5]

Why might this matter for sarcopenia? Because muscle loss rarely has a single cause. It is often the result of several small pressures stacking up over the years: low physical activity, low protein intake, chronic low-grade inflammation, oxidative stress, and metabolic changes such as insulin resistance.[6] Individuals with sarcopenia have been observed to consume nuts less frequently than those without this condition.[7,8] Nuts are of particular interest to nutrition researchers because they may influence several pathways at once.

First, inflammation and oxidative stress. Ageing is often accompanied by a low level of inflammation and slower recovery from physiological stress. These processes are linked to weaker muscle and a reduced response to both dietary protein and exercise.[9] Many nuts contain antioxidants and anti-inflammatory compounds that may support a healthier inflammatory balance. Walnuts, in particular, are notable for their omega-3 fatty acids, which are frequently linked to anti-inflammatory effects while other nuts provide a variety of additional anti-oxidant phytochemicals.[5] This does not mean nuts act like a medicine, but it does make them a reasonable food to include in a muscle-supportive diet.

Second, diet quality and appetite. Sarcopenia is more likely when people eat too little protein overall or when most protein is concentrated into one meal. Older adults

> *"Nut consumption may support muscle health by providing plant protein, healthy fats, and key minerals that help maintain strength and function with age."*

INC World Forum for Nutrition Research and Dissemination

may also have reduced appetite or less motivation to cook. Nuts can help because they are portable, satisfying, and easy to add to familiar foods.[10] A small handful of nuts with fruit, a sprinkle of chopped nuts on oatmeal, or a spoonful of nut butter stirred into yogurt can transform a light snack into a more nourishing option.

Third, nuts may improve diets simply by what they replace. Nuts are energy-dense, so portion size matters, but that same energy density can be advantageous when nuts replace refined snacks.[5] Swapping cookies, chips, or sugary pastries for nuts usually improves overall diet quality, which supports metabolic health.[11] Better blood sugar control and healthier body composition generally create a friendlier environment for maintaining muscle mass and function.[12]

So, what does the research say today? The honest answer is that the current evidence is promising, but not definitive. Much of the evidence linking nut intake to long-term health outcomes is observational. Observational studies are valuable, but they cannot prove cause and effect, because nut eaters may also have other healthy habits. Well-designed intervention trials focused specifically on muscle-related outcomes are therefore needed.

An ideal "nuts and sarcopenia" trial would be practical. It would recruit older adults at risk of muscle decline and randomly assign them to eat a daily portion of nuts—typically around a handful—or a similar-calorie control snack. Outcomes would focus on real-life measures of muscle function, such as handgrip strength, chair-rise performance, walking speed, balance, and changes in lean mass. The strongest trials would also track total protein intake and physical activity, because nuts are most likely to support muscle health when combined with adequate protein and regular resistance or strength training.

For everyday life, you do not need perfection; you need consistency. If you want to include nuts in a muscle-friendly routine, aim for a handful every day, choosing unsalted or lightly salted options when possible and avoiding sugar-coated varieties. If weight management is a goal, the simplest strategy is substitution: replacing a less nutritious snack with nuts rather than adding nuts on top of existing foods.

In summary, integrating nuts into a balanced diet and an overall healthy dietary pattern may be a strategic element for healthy aging. Nuts are not a cure for sarcopenia, and well-designed human clinical trials are still needed to confirm their direct benefits for this condition. Moreover, no single food can compensate for a lack of movement. But as part of a lifestyle built on resistance or strength training, adequate protein distributed across the day, good sleep, and eating mostly whole foods, a daily handful of nuts is a simple and tasty habit that could help you age with more strength and confidence.[13] If you are starting from zero, begin with nuts a few days per week and build up. Keep portions modest and remember: strength training remains the main tool for stronger muscles.

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New Scientific Studies

Peanut Allergies Decline After Publication of Early Introduction Guidelines

Gabryszewski, S. J., et al. (2025).

Guidelines for Early Food Introduction and Patterns of Food Allergy.

Pediatrics, 156(5), e2024070516.

This study examined changes in peanut allergy incidence following the 2015 publication of a consensus statement backed by nearly a dozen medical associations that recommended early peanut introduction for high-risk infants. The statement marked a key milestone in the shift away from the previous medical guidance instructing parents to delay introduction of peanut.

Using electronic health record data from around 40,000 children aged 0-3 years in US primary care settings, researchers looked at how food allergy diagnoses changed from the 2012-2014 pre-guidelines period to the 2015-2017 post-guidelines period.

The findings suggest that rates of peanut allergy in young children in the United States declined significantly following the publication of the guidelines. The cumulative incidence of immunoglobulin E–mediated peanut allergy fell from 0.79% before the guidelines to 0.53% after their introduction—a relative reduction of around one-third. Rates declined even further, to 0.45%, after the release of addendum guidelines in 2017.

Almond Supplementation Shown to Improve Cardiovascular Risk Markers in Pregnant Women

Arslan, S., et al. (2025).

Daily Almond Supplementation Improves Blood Pressure and Lipid Profile in Pregnant Women with Hypertension and Dyslipidemia: A Randomized Controlled Trial.

The Journal of Nutrition, 101270.

In this 12-week randomized controlled trial, researchers assessed the effects of almond supplementation at two different doses (10 grams/day and 25 grams/day) on blood pressure, lipid profile, and heart rate in 103 pregnant women with confirmed hypertension and/or dyslipidemia. Participants were randomly assigned to one of three groups: a group instructed to eat 10 grams of almonds per day, a group instructed to eat 25 grams of almonds per day, or a control group. The researchers measured changes in systolic and diastolic blood pressure every 4 weeks. They also assessed serum triglycerides, total cholesterol, LDL ("bad") cholesterol, HDL ("good") cholesterol, and heart rate at baseline and at week 12.

After 12 weeks, the researchers found that almond supplementation had significantly improved blood pressure and lipid profile, especially at the higher dose of 25 grams/day. These findings highlight the potential role of almonds as a complementary dietary strategy for managing cardiometabolic risk in pregnancy.

Higher Nut Intake Associated With Lower Risk of Depressive Symptoms

Kim, S., et al. (2025).

The Association Between Nut Consumption and Risk of Depressive Symptoms: A Meta-Analysis of Observational Studies.

Nutrients, 17(24), 3810.

In this meta-analysis, researchers compiled information from seven observational studies on the relationship between nut consumption and depressive symptoms, comprising a total of 70,136 participants. Statistical analysis showed that people who ate three or more servings of nuts per week were about 25% less likely to be classified as having depressive symptoms, compared to those who ate less than one serving of nuts per week.

The authors hypothesized that the possible link between nut consumption and lower depressive symptoms could stem from the many bioactive nutrients naturally present in nuts.

KIRLIOĞLU

Ambassador of Fruitful Nature

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JAN PHILIP WESSEL

CATEGORY BUYER –
NUTS & DRIED FRUITS
EDEKA, GERMANY

Founded in 1907, the Edeka Group is one of Germany's largest food retail organizations, serving as an umbrella for approximately 3,200 independent retailers. Together, these retailers operate about 10,900 food stores nationwide, including around 4,400 Netto Marken-Discount outlets, spanning neighborhood stores to hypermarkets. In 2024, the group reported a record annual turnover of €75.3 billion, up 6.5 % year-on-year, and employed roughly 413,000 people. Edeka offers a broad private-label portfolio alongside national brands.

What are the most important consumer trends currently shaping the nut and dried fruit category in Germany?

FN: In terms of our perceived prioritization, we would express this as follows:

1. **Health and wellness as the primary purchase driver:** Natural proteins and good fats, dietary fiber, positive effects on heart health and weight management.
2. **Plant-based and flexitarian lifestyles boosting consumption:** Nuts as a protein source, dried fruit as a natural sweetener and energy source.
3. **Premium, organic and clean-label products:** The premium and organic segment already accounts for 35% of market value and is growing. "No added sugar" in dried fruits is more relevant.
4. **Sustainability and regional sourcing:** Sustainable supply chains, environmentally friendly packaging, regenerative agriculture (for nuts), CO_2 reduction and short transport routes.
5. **Convenience and snacking:** On-the-go demand is still rising.
6. **Flavor innovation and culinary exploration:** Spiced nuts, fermented nuts, exotic flavor combinations and new milk alternatives (e.g., walnut drink).

Are you seeing changes in how consumers use nuts and dried fruits?

JPW: Snacking habits have changed significantly. Nuts and dried fruits are increasingly consumed as everyday snacks rather than occasional treats or baking ingredients. This shift directly contributes to their expanding role in functional nutrition and healthy snacking.

Many consumers associate nuts and dried fruits with natural energy, protein, fiber, healthy fats and micronutrients. This also influences the ever-growing importance of nuts and dried fruits as ingredients, whether as milk alternatives, vegetarian/vegan meat substitutes, or spreads and nut-based cream substitutes. From a product development perspective, this leads to innovation across several dimensions. Formats are becoming more usage-oriented, supporting both snacking occasions and culinary applications. Recipes are increasingly designed around functional benefits such as protein content, fiber or natural energy, while maintaining short and transparent ingredient lists. Overall, nuts and dried fruits are no longer developed as single-use products but as multifunctional ingredients and snack solutions tailored to different consumption moments.

Edeka operates entry-level and premium private label brands, while also carrying national brands. How do nuts and dried fruits fit into your multi-tier private label strategy?

FN: Gut & Günstig is Edeka's value-driven brand with over 3,250 products across all key everyday categories. It is positioned to offer national-brand quality at discount prices, directly competing with discount. Edeka's premium tier focuses on exclusive, carefully selected specialties that "deserve to carry the yellow heart," emphasizing craftsmanship, origin, and exceptional quality—roasted and salted macadamia nuts in their shells, directly from South Africa without any detours, or our 80% walnut kernels from the top packers in the USA and Chile. This is a matter close to our hearts. Together with all the great, strong brands, we succeed in demonstrating a level of expertise in this segment for the consumer that every independent retailer can identify with.

What sourcing strategies do you use for your private-label nut and dried fruit products?

JPW: For our private-label portfolio, we follow a sourcing approach based on three pillars: quality, transparency and long-term partnerships. We work with a mix of direct origin sourcing, especially for large-volume commodities such as walnuts, almonds, cashews and key dried fruits, and specialized European processors for value-added formats like roasted nuts or mixed products. We rely on multi-origin sourcing strategies to minimize supply risks and stabilize availability. By combining long-term supplier relationships with ongoing quality benchmarking, we ensure consistent product standards across harvest cycles and countries. For our premium tier, origin and varietal selection play an even stronger role.

> *"Nuts and dried fruits are no longer developed as single-use products but as multifunctional ingredients and snack solutions tailored to different consumption moments."*

How does your buying team work together when making sourcing and assortment decisions across such a broad range of nuts and dried fruits?

JPW: In many areas, team members carry primary responsibility for specific topics. However, regular exchange of relevant information remains essential. Market developments can be complex and interconnected, and no single person can track all aspects at once. Sharing insights openly helps ensure well-informed decisions and supports effective collaboration across all related fields.

What are the key advantages of sourcing raw materials directly from the origin?

JPW: We source nuts and dried fruits from all leading global origins like Spain, Chile, USA, Italy, South Africa and many others. Directly sourcing raw materials at their origin offers several significant advantages: It gives us full control over quality, allowing direct influence on processing and standards. A shorter supply chain increases margin potential by eliminating intermediaries. Additionally, having the entire supply chain under our control reduces risks and helps prevent delivery disruptions.

How does Edeka translate consumer expectations around sustainability into concrete decisions?

FN: Sustainability is often reflexively associated with environmental protection. By definition, however, sustainability also includes the economic pillar—that is, economic stability—as well as social justice. Is a product sustainable if it lacks economic stability but is grown locally? Probably not. But as soon as a product fulfills all three pillars, there are few arguments against it. We always try to harmonize these aspects to ensure long-term consumer satisfaction. And that includes ensuring the products are fresh. Of course, a paper bag looks incredibly sustainable—there's no question about that. But is it really just paper, or is it coated? Is the packaging truly airtight, or is there a potential for the walnuts to oxidize, ultimately leaving the customer less than satisfied?

How do insights from your buying team, suppliers and co-packers feed into innovation within Edeka's private label nut and dried fruit range?

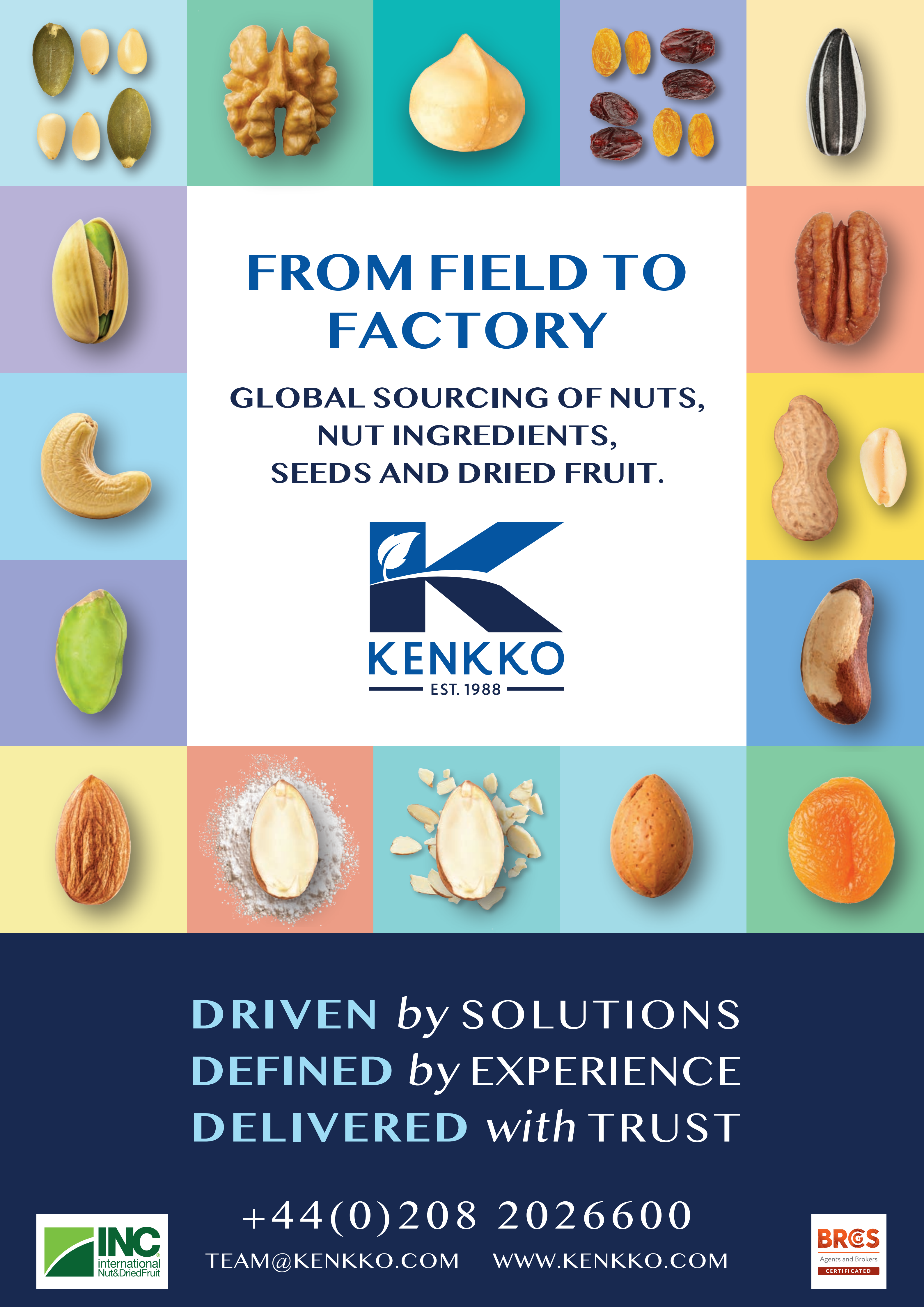
FN: A crucial point: nobody knows everything. We genuinely value every exchange. If we're open to it, we learn something from almost every conversation. A new variety, a new origin, new packaging, an emerging problem during a harvest—we're working with a natural product, yet every consumer expects it to be perfect. To meet these expectations, daily communication with all stakeholders in the industry is essential, perhaps even indispensable.

Has the current geopolitical climate influenced Edeka's sourcing strategies, and are you seeing any related shifts in consumer behavior?

JPW: Geopolitical uncertainties—from shipping disruptions to regional conflicts and the COVID-19 pandemic—have clearly influenced our sourcing strategies. We increasingly rely on geographical diversification to reduce dependencies on single origins. For example, whereas we previously bought large volumes from one major region, we now deliberately include secondary origins to protect availability and pricing stability. We also rely a lot on long-term strategic partnerships. On the consumer side, the main observable shift is a heightened sensitivity to price-quality ratios. Customers remain willing to pay more for premium nuts and dried fruits, but only if the quality difference is evident. Transparent communication about origin, sustainability and freshness is therefore more important than ever. On the other end, consumers are not willing to pay unlimited premiums simply because one producing country had a poor harvest or is keeping prices artificially high. Every nut and every dried fruit reaches a clear psychological price ceiling. Once this threshold is exceeded, shoppers begin to substitute freely across varieties: cashews instead of almonds or hazelnuts, raisins instead of cranberries and so on.

Looking three to five years ahead, how do you expect Edeka's nut and dried fruit assortment to evolve in terms of sourcing models, sustainability and product positioning?

FN: I would be grateful if someone could give me a reliable answer regarding a time horizon for the next three years... Considering current trends and looking back, I personally expect everything to accelerate. The entire industry generates significant revenue and carries a certain responsibility. This will motivate players—individuals, companies and (new) origins—to try new things and claim their success accordingly. But again—how sustainable is this really? Will we recognize the potential in time, or will we be too late? Will we jump in too early, and will it remain just an attempt? In any case, the coming years certainly won't be boring.



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PRELIMINARY PROGRAM

Sunday, May 10

12:00 pm – 5:30 pm
CONGRESS REGISTRATION

Monday, May 11

7:00 am – 2:00 pm
GOLF TOURNAMENT
Sponsored by Valley Pride

8:00 am – 5:30 pm
CONGRESS REGISTRATION

Tuesday, May 12	Wednesday, May 13	Thursday, May 14
7:15 am – 4:30 pm CONGRESS REGISTRATION	8:00 am – 4:30 pm CONGRESS REGISTRATION	8:00 am – 2:00 pm CONGRESS REGISTRATION
9:00 am – 3:00 pm TOUR FOR ACCOMPANYING PERSONS	9:00 am – 3:00 pm TOUR FOR ACCOMPANYING PERSONS	
8:00 am – 4:30 pm Nutfruit Plaza ALL-DAY COFFEE & EXHIBITION BOOTHS	8:00 am – 4:30 pm Nutfruit Plaza ALL-DAY COFFEE & EXHIBITION BOOTHS	8:00 am – 4:30 pm Nutfruit Plaza ALL-DAY COFFEE & EXHIBITION BOOTHS
Nutfruit Plaza MEETING AREA *Sponsored by Al Jameel International*		
8:00 am – 8:30 am MORNING COFFEE *Sponsored by Almond Board of California*	8:00 am – 8:30 am MORNING COFFEE *Sponsored by Blue Diamond Almonds*	8:00 am – 8:30 am MORNING COFFEE *Sponsored by Rainbow Nut Co., Ltd.*
8:30 am – 9:30 am CONGRESS OPENING	8:30 am – 9:30 am WALNUTS ROUND TABLE	8:30 am – 9:30 am HAZELNUTS ROUND TABLE
9:30 am – 10:30 am ALMONDS ROUND TABLE	9:30 am – 10:30 am BRAZIL NUTS, PINE NUTS, AND PEANUTS ROUND TABLE	9:30 am – 10:30 am DATES, APRICOTS & FIGS ROUND TABLE
10:30 am – 11:00 am COFFEE BREAK *Sponsored by Almond Board of California*	10:30 am – 11:00 am COFFEE BREAK *Sponsored by Blue Diamond Almonds*	10:30 am – 11:00 am COFFEE BREAK *Sponsored by Rainbow Nut Co., Ltd.*
11:00 am – 12:00 pm RAISINS, PRUNES & CRANBERRIES ROUND TABLE	11:00 am – 11:45 am PECANS ROUND TABLE	11:00 am – 11:15 am INC AWARDS: SUSTAINABILITY & INNOVATION
12:00 pm – 12:45 pm NUTRITION RESEARCH SEMINAR Chaired by Prof. Jordi Salas Salvadó, INC World Forum for Nutrition Research and Dissemination	11:45 am – 12:30 pm KEYNOTE SPEAKER Jason Fu, Chief AI Expert for the Consumer Industry at Feishu, China	11:15 am – 12:15 pm CASHEWS ROUND TABLE
12:45 pm – 1:30 pm KEYNOTE SPEAKER Brandy Niu, Vice President of JD.com and President of JD Retail FMCG, China	12:30 pm – 1:30 pm PISTACHIOS ROUND TABLE	12:15 pm – 1:00 pm MACADAMIAS ROUND TABLE
1:30 pm – 3:00 pm WORKING BUFFET LUNCH *Sponsored by Three Squirrels Inc.*	1:30 pm – 3:00 pm WORKING BUFFET LUNCH *Sponsored by Setton Pistachios of Terra Bella*	1:30 pm – 3:00 pm WORKING BUFFET LUNCH *Sponsored by Dorado FZCO*
3:00 pm – 3:30 pm SPONSORED PANEL SESSION *Sponsored by Laitram*	3:00 pm – 3:30 pm SPONSORED PANEL SESSION *Sponsored by Anysort*	
3:30 pm – 4:00 pm SPONSORED PANEL SESSION *Sponsored by Raisins South Africa*	3:30 pm – 4:00 pm SPONSORED PANEL SESSION	
6:00 pm – 8:00 pm WELCOME COCKTAIL Oasis Ballroom & Grand Resort Pool Deck, Galaxy Resort *Sponsored by Chacha Food Co., Ltd.*	7:00 pm – 10:00 pm (Buses depart from 6:30 pm) CASUAL BUFFET DINNER Macao Tower *Wonderful Pistachios and Almonds*	6:30 pm – 12:00 am COCKTAIL, GALA DINNER AND BALL Hall C, Galaxy International Convention Center *Sponsored by Chilenut*

Keynote Speakers

Each year, the INC Congress is the place to be for strategic insights from high-profile business leaders with deep expertise in the nut and dried fruit trade. We are pleased to present our keynote speakers for the upcoming Congress.

BRANDY NIU

Vice President of JD.com and President of JD Retail FMCG, China

Ms. Niu serves as Vice President of JD.com and President of JD Retail FMCG. She oversees the end-to-end merchandising and category operations for food, fast-moving consumer goods and agricultural products, spearheading operations for JD Super (JD's supermarket channel) and the premium membership-based platform Yihaodian (One's Member). Under her leadership in the first half of 2025, JD Retail's FMCG business group outpaced industry growth in gross merchandise value, order volume, and user growth, reinforcing its market-leading status. Ms. Niu joined JD.com in 2022, following a career in senior leadership roles at Procter & Gamble, Amazon, and Mars.

JD.com is ranked 44th on the Fortune Global 500 list and is China's largest retailer by revenue, serving over 700 million annual active customers. The company's cutting-edge retail infrastructure seeks to enable consumers to buy whatever they want, whenever and wherever they want it. Committed to the principles of customer first, innovation, dedication, ownership, gratitude, and integrity, the company's mission is to make lives better through technology, striving to be the most trusted company in the world.

JASON FU

Chief AI Expert for the Consumer Industry at Feishu, China

Mr. Fu has long been deeply engaged in the digital transformation of the consumer sector. He focuses on using artificial intelligence to build end-to-end digital employees for enterprises, covering the entire process from decision-making to execution, and helping enterprises embrace the AI revolution. In 2025, Jason has delivered AI lectures to over 80 enterprises, popularizing AI cognition among top executives and management teams.

Feishu is an all-in-one enterprise collaboration platform developed by ByteDance, the Chinese technology company best known for TikTok. It is designed to help organizations communicate and work together through a single integrated workplace application that combines instant messaging, online documents, cloud storage, smart calendars, meeting systems, and other tools. ByteDance is valued at more than US$330 billion and employs around 150,000 people globally.

INC Awards

Honorary Golden Nut Award

CAO DERONG

President of the China Chamber of Commerce for Import and Export of Foodstuffs, Native Produce and Animal By-Products (CFNA), China

President Cao Derong has nearly 40 years of experience in international investment promotion and coordination of international trade in food and agricultural products. He has successively held positions in key departments of the former State Economic and Trade Commission, the Ministry of Commerce, and large central enterprises, and served as Economic and Commercial Counselor of the Consulate General of China in Houston. He possesses profound insights into China's international investment and foreign trade policies, national agricultural development plans, and the construction of the food and agricultural products distribution system. He has led the CFNA since 2019.

Corporate Golden Nut Award

THREE SQUIRRELS

China

Three Squirrels Inc., founded in 2012, is a leading agricultural industrialization enterprise and a publicly listed company (Stock code: 300783). It integrates food R&D, intelligent manufacturing, brand operations, and omni-channel sales. Serving over 170 million consumers globally, the company sources high-quality nuts from regions like Australia, Chile, and Vietnam, while promoting rural revitalization in China. It operates smart factories, collaborates with Fortune 500 firms, and drives sales through a short video–based omni-channel strategy. With over 60 billion RMB in cumulative sales and strong 2024 growth, Three Squirrels aims to reach 20 billion RMB in revenue by expanding digital distribution, innovating its supply chain, and developing new consumer-focused brands.

Corporate Golden Nut Award

CHACHA FOOD

China

Founded in 1995, Chacha is a leading Chinese nut snack manufacturer with more than 30-year legacy of quality. Generating over US$1 billion annually, it pioneered roasted sunflower seeds, selling over 2 billion units and leading the category for two decades. It has expanded its portfolio to include innovative offerings such as nuts, potato crackers, fruit juice jelly, and other snack foods. Chacha holds 317 patents, contributes to 49+ national standards, and leads in freshness technology, with products sold in 1 million Chinese outlets and over 50 countries. Its vertically integrated supply chain spans dedicated farms and 11 high-tech, BRC Class A factories with CNAS-certified labs. In 2017, it received China's National Science & Technology Progress Award.

Lifetime Achievement Award

CHENG HUNG KAY

General Manager, CHK Trading Co. Ltd., Hong Kong, China

Mr. Cheng started his career in 1973 at the Guangdong Native Product & Animal By-Products Import & Export Corporation, where he worked to establish 21 cashew processing plants across Guangdong province and worked with the Chinese cashew industry to establish the national standard for cashew kernels and cashew nut shell liquid. He has introduced various tree nut products to China, including Iranian pistachios—for which he coined the name "Happy Nuts"—as well as Turkish hazelnuts, California almonds and Australian macadamias. He was the first to assist the California industry to sort pistachio kernels to a value-added product and led the creation of artificial-opening pistachios. He introduced Chinese pine nuts and blanched de-bitter apricot kernels to the US market in 1978. He serves as INC Ambassador in China for Hong Kong.

Lifetime Achievement Award

WENG YANGYANG

Vice Executive Chairman of the Specialized Committee for Nuts and Dried Fruits of the China National Food Industry Association, China

Ms. Weng has dedicated her career to the administration and development of China's food industry over several decades, holding key leadership positions in the Suzhou Municipal Government Food Industry Office and the China National Food Industry Association. Ms. Weng founded the China International Nuts and Dried Fruit Exhibition in 2006, and she has organized the 917 Nuts for Health Week every year since 2016. Since 2007, Ms. Weng has leveraged industry expertise to develop and establish over 40 national, industry and group standards covering safety, management and product specifications, accelerating the industry's transformation toward industrialization and intelligent manufacturing.

Excellence in Research Award

PROF. CYRIL KENDALL

Senior Research Associate, University of Toronto and St. Michael's Hospital, and Adjunct Professor, University of Saskatchewan, Canada

Dr. Kendall's primary research interest is the role of diet in the prevention and treatment of chronic disease. He has over 250 publications in peer-reviewed medical journals. His research on the Portfolio Diet, which combines cholesterol-lowering food components, has been included in several guidelines as an effective dietary strategy for cholesterol reduction. He has also conducted much research on the role of healthy dietary patterns, including low glycemic index diets, in cardiometabolic health and the control of type 2 diabetes. Dr. Kendall has made outstanding contributions to strengthening the scientific evidence on the health effects of nut consumption.

Excellence in Gastronomy Award

JACK LIN

State Banquet Chef and Media Personality, China

A distinguished state banquet chef with over three decades of professional experience in elite hotel management, Mr. Lin is widely recognized as a top-tier food influencer with a combined social media following exceeding 20 million fans. He has served as the head chef for high-profile international events like the G20 Summit and the Global Fortune Forum. He is a prominent television personality, frequently appearing on popular programs like *Chinese Restaurant*. Additionally, he is an accomplished author and the founder of the Weijue brand, dedicated to sharing refined Eastern culinary traditions.

Sustainability and Innovation Awards

The winners of the prestigious **AWARD FOR EXCELLENCE IN SUSTAINABILITY** and **INNOVATION AWARD** will also be revealed at the INC Congress in Macao. The Excellence in Sustainability Award, presented in two categories—*Back to the Planet* and *Back to the People*—recognizes impactful initiatives that drive meaningful progress in environmental and social responsibility. The Innovation Award celebrates pioneering products and services that are shaping new pathways for growth and competitiveness across the industry.

Among the most anticipated moments of the Congress, these accolades honor outstanding achievements while providing recipients with international recognition. Awardees gain the opportunity to present their accomplishments before an audience of 1,200+ industry leaders representing more than 60 countries. The live announcement in Macao will spotlight the creativity, responsibility, and forward-looking spirit that continue to propel the sector ahead.

Nutrition Research Seminar

Chaired by Prof. Jordi Salas-Salvadó, the Nutrition Research Seminar will feature two distinguished guest speakers: Prof. Cyril Kendall and Prof. Alison Coates.

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PROF. JORDI SALAS-SALVADÓ

Chairman of the INC World Forum for Nutrition Research and Dissemination

"Nut Consumption and Prevention of Non-Communicable Diseases: Highlights From NUTS 2025 and Preliminary Findings From the NUTPOOL Study"

This presentation will summarize key highlights from the NUTS 2025 international conference, held in November, and present preliminary findings from the project Nut Consumption and Prevention of Non-Communicable Diseases (NUTPOOL Study). NUTPOOL is an individual participant data meta-analysis including 26 prospective cohorts and one million participants from the Americas, Europe, Asia, and Oceania. The project examines the association between nut consumption and the long-term risk of major non-communicable diseases (NCDs), including type 2 diabetes, cardiovascular disease, cancer, neurodegenerative diseases (dementia and Alzheimer's disease), and all-cause mortality. We will discuss emerging evidence on dose-response relationships, potential effect modifiers, and methodological challenges, and highlight the implications of these findings for dietary guidelines and global public health strategies aimed at NCD prevention.

PROF. CYRIL KENDALL

Senior Research Associate, University of Toronto and St. Michael's Hospital, and Adjunct Professor, University of Saskatchewan, Canada

"Nuts in the Prevention and Control of Diabetes: An Update of the Science"

Diabetes represents a global economic tsunami for healthcare systems and remains one of the most urgent unmet prevention challenges worldwide. Nuts are well recognized for their cholesterol-lowering effects and their role in reducing the risk of coronary heart disease. However, their potential contribution to diabetes prevention and management is less well recognized. Contrary to earlier concerns about their fat content and energy density, emerging evidence shows that nut consumption is associated with consistent metabolic benefits, including improvements in glycemic control, insulin sensitivity, and cardiometabolic risk factors. This presentation will review the latest scientific findings on nuts in the prevention and management of diabetes and explore the possible mechanisms that may help explain these protective effects.

PROF. ALISON COATES

Dean of Research Programs, Graduate Research School, Adelaide University, Australia

"Weighing Up the Evidence on Nut and Dried Fruit Consumption and Weight Management"

A significant body of evidence shows regular nut consumption is linked with a reduced risk of overweight and obesity, and that regularly eating nuts, when consumed as part of a healthy diet, does not adversely affect weight. This presentation will summarize the latest findings on incorporating nuts into low-energy diets for weight management and then focus on outcomes from an energy-restricted intervention with almonds. The role of appetite regulation, gut microbiome, liver function, and oxidative stress will be highlighted as possible mechanisms for further investigation. The presentation will also examine the evidence on dried fruits and weight management.

Evening Social Events

The INC Congress social events bring the global nut and dried fruit industry together in a lively, convivial atmosphere—perfect for networking, celebrating, and building lasting connections beyond the conference sessions.

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WELCOME COCKTAIL

May 12, 2026
Oasis Ballroom & Grand Resort Pool Deck, Galaxy Resort

Set against the backdrop of a spectacular artificial wave pool, the welcome cocktail offers the perfect setting to reconnect, network and unwind. Delegates will enjoy an evening of fine hors d'oeuvres, refreshing drinks, and vibrant entertainment in a cheerful, open-air atmosphere—an inviting start to a dynamic and engaging Congress experience.

Sponsored by Chacha Food Co., Ltd.

ChaCha

CASUAL BUFFET DINNER

May 13, 2026
Macao Tower

Organized around the theme "West Meets East," this evening celebrates the unique cultural richness of Macao through its Portuguese heritage and strong Oriental influence. After a convenient bus transfer from the Galaxy International Convention Center, guests will enjoy a tasty meal in a relaxed setting, with the option to visit the observation deck for mesmerizing 360° views of the Pearl River Delta.

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COCKTAIL, GALA DINNER & BALL

May 14, 2026
Hall C, Galaxy International Convention Center

The INC Congress's spectacular gala evening unites delegates for an unforgettable night of fine wine, exquisite cuisine, and lively music. The celebration begins with elegant cocktails, followed by a sumptuous formal dinner, and continues with dancing, laughter, and shared memories—an enchanting finale that honors connections, camaraderie, and the conclusion of a truly inspiring INC Congress.

Sponsored by Chilenut

Activities and Tours

These optional experiences allow delegates and their companions to explore Macao, discover its heritage, and enjoy memorable moments beyond the conference sessions. Visit the congress website to sign up now!

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GOLF TOURNAMENT **May 11, 2026**

Warm up for the INC Congress by facing off against your fellow golfers. Set in the vibrant Cotai Reclamation Area, the Macao International Golf Club offers a unique blend of beauty and challenge, perfect for golf enthusiasts and industry professionals looking to network. The event features a shotgun start at 8:00 am, followed by 18 holes of golf and a group lunch. Convenient transportation to and from the golf club will be provided.

Photo © Macao International Golf Club

TOURS FOR ACCOMPANYING PERSONS

MACAO TOUR
May 12, 2026

Discover Macao's charm and culture on a guided tour filled with history, stunning views, and authentic local flavor. From iconic landmarks to hidden gems, experience the city's unique East-meets-West character, guided by knowledgeable experts and complemented by comfortable transport, fascinating stories, and delicious local treats—a memorable day exploring the heart of Macao.

COTAI AND TAIPA CULTURAL TOUR
May 13, 2026

Step into Macao's rich history with a visit to A-Ma Cultural Village on Coloane Island, near the world's tallest statue of the goddess A-Ma. Wander through charming Coloane Village, savor Portuguese egg tarts at Lord Stow's Bakery, explore the Taipa Houses Museum, and stroll Rua do Cunha, where colorful buildings, temples, and local flavors create an unforgettable cultural experience.

China Immersive Industry Experience

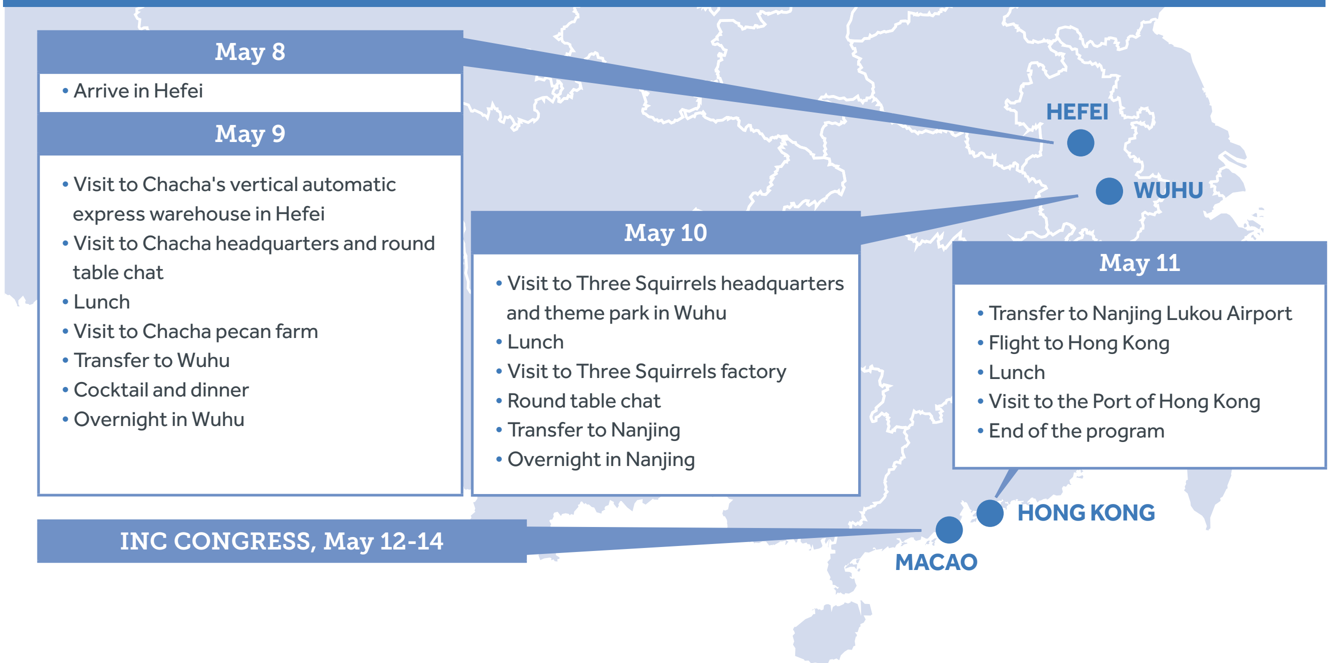
Enhance your INC Congress experience by joining the industry's premier hands-on learning experience in China.

Just ahead of the INC Congress in Macao, the China Immersive Industry Experience provides a unique opportunity to explore China's dynamic nut and snack sector up close. Participants will engage with leading companies such as Chacha Food and Three Squirrels, celebrated for their innovative product development, efficient supply chains, and strong consumer engagement. The experience also includes a visit to the Port of Hong Kong, one of the world's busiest and most advanced trading hubs, offering insight into global logistics and supply chain excellence. Beyond observing operational achievements, attendees will discover how these organizations integrate advanced technologies, sustainability initiatives, and market-driven strategies to maintain a competitive edge in the global marketplace.

Running from May 9-11, 2026, this three-day journey wraps up just in time to head to Macao for the INC Congress.

For more information, visit: https://academia.nutfruit.org/on-site-technical-visit-on-nuts-dried-fruits-china/

Preliminary Program



May 8
- Arrive in Hefei

May 9
- Visit to Chacha's vertical automatic express warehouse in Hefei
- Visit to Chacha headquarters and round table chat
- Lunch
- Visit to Chacha pecan farm
- Transfer to Wuhu
- Cocktail and dinner
- Overnight in Wuhu

May 10
- Visit to Three Squirrels headquarters and theme park in Wuhu
- Lunch
- Visit to Three Squirrels factory
- Round table chat
- Transfer to Nanjing
- Overnight in Nanjing

May 11
- Transfer to Nanjing Lukou Airport
- Flight to Hong Kong
- Lunch
- Visit to the Port of Hong Kong
- End of the program

INC CONGRESS, May 12-14




Photos: Chacha Food headquarters, Port of Hong Kong, Three Squirrels factory, and Three Squirrels headquarters and theme park.

Sponsors and Exhibitors

We extend our sincere thanks to all sponsors and exhibitors for their support of the INC Congress in Macao. Your partnership and commitment play a vital role in making this event a success, and we look forward to an exciting, productive, and memorable Congress together!

Thank you for supporting the INC Congress!
congress.nutfruit.org

INC SUSTAINABILITY CERTIFICATION ON NUTS AND DRIED FRUIT

TAKE THE LEAD IN SUSTAINABLE EXCELLENCE

Set your company apart with the INC Sustainability Certification —the trusted mark of verified sustainability in the nut and dried fruit industry

WHY GET CERTIFIED?

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  Certification helps your company stand out, opening doors to new business opportunities.
- **Global Alignment of the Supply Chain**
  Aligns with ESG expectations and validates your sustainability efforts.
- **Credibility & Trust**
  Provides a respected, third-party validated seal that showcases your commitment and leadership.

WHO CAN APPLY?

INC member companies who are:

- **Growers**
- **Processors & Manufacturers**
- **Global Trade Specialists**

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INC international Nut&DriedFruit

INC Executive Committee Gathers in California and Advances Strategic Goals

Visit to the Resnick Sustainability Institute, Caltech.

In early March 2026, the INC Executive Committee gathered in California for its regular meeting—the centerpiece of a longer visit to the state that also featured a busy program of meetings, visits, and industry engagement.

On March 5-6, the Committee held its regular meeting in Los Angeles. Members reviewed progress across the INC's key initiatives—including preparations for the upcoming INC Congress in Macao—and took decisions that will shape the organization's future projects. Discussions were firmly anchored in the INC's three strategic goals: obtaining a health claim and updating dietary guidelines, pioneering and advancing sustainable practices, and increasing global consumption and market access for nuts and dried fruits.

Sustainability marked another important milestone during the California visit. The INC formally signed an agreement with DFA of California, designating them as an official auditing partner for the INC Sustainability Certification. This key step paves the way for INC members to pursue certification.

A visit to the Resnick Sustainability Institute at the California Institute of Technology provided valuable insight into how cutting-edge research and science-based solutions can help address environmental challenges and support more sustainable practices across the nut and dried fruit sector.

The delegation also visited the INC's booth at Expo West in Anaheim, one of the leading trade shows for natural and organic products. The visit underscored the INC's strong visibility within the broader food and health-focused community and offered an opportunity to connect with key companies and industry stakeholders.

Signing ceremony between the INC and DFA of California.

INC booth at Expo West, Anaheim.

A Handful a Day: Unlocking Billions in Healthcare Savings

Intake vs. Potential Annual Healthcare Savings

GERMANY

14.5 g/day

Increase to 30 g = healthcare expenditure reduced by:

€15.4 B/year

SPAIN

8.9 g/day

Increase to 30 g = healthcare expenditure reduced by:

€4.6 B/year

UNITED STATES

17.1 g/day

Increase to 30 g = healthcare expenditure reduced by:

€80.5 B/year

Could eating more nuts reduce healthcare costs? The INC commissioned a study to find out.

Increasing nut consumption to recommended levels could deliver substantial health and economic benefits, potentially reducing healthcare expenditures in Germany, Spain, and the United States by more than €100.5 billion per year, according to an INC-commissioned study conducted by KPMG.

According to scientific evidence, consuming a daily handful of nuts is associated with a 25% reduction in the risk of coronary heart disease, a 21% reduction in overall cardiovascular disease (CVD) risk, and a 15% reduction in cancer risk. Nut consumption is also linked to lower mortality rates, including a 22% reduction in CVD-related deaths, an 11% reduction in cancer mortality, and a 22% reduction in all-cause mortality. When these health improvements are translated into economic terms, the impact becomes even more striking.

The findings from the study suggest that achieving a daily intake of 30 grams of nuts (one handful) could generate annual healthcare savings of €15.4 billion in Germany, €4.6 billion in Spain, and €80.5 billion in the United States. Consumption stands at 14.5 grams per day in Germany, 8.9 grams in Spain, and 17.07 grams in the United States—meaning each country is realizing only a fraction of the potential health benefits.

> *"INC-commissioned study finds that boosting nut consumption to recommended levels would save more than €100.5 billion annually across three countries."*

Nuts are widely recognized as part of a healthy dietary pattern, yet consumption remains well below the recommended intake of 30 grams per day. Regular nut consumption has been linked to a lower risk of chronic diseases—including cardiovascular disease and cancer—which place a significant financial burden on healthcare systems worldwide.

The study assessed the economic impact of increasing nut consumption from current levels to the recommended daily intake in the three countries. Using a two-phase methodology, it reviewed existing scientific evidence on nut consumption and health outcomes and estimated the resulting healthcare and productivity-related savings.

These findings demonstrate that encouraging higher nut consumption represents a practical, evidence-based opportunity to improve public health while supporting more sustainable healthcare spending.

Gulfood 2026: Our Biggest INC Pavilion Ever in Dubai

This year saw the most ambitious and successful INC Pavilion at Gulfood to date, bringing together key players from across the global nut and dried fruit industry.

Gulfood 2026 was defined by meaningful networking, international collaboration and forward-looking discussions on sustainability, transparency and the future of the sector. One of the standout moments was the INC Networking Reception, sponsored by Al Jameel International. Set in a welcoming atmosphere, this enjoyable evening was filled with relaxed conversations, new introductions, and familiar faces reconnecting. Members enjoyed premium mocktails, high-quality nuts and dried fruits, and, most importantly, the chance to strengthen relationships that go beyond business.

During the event, INC Chairman Ashok Krishen commented: "It's been an awesome program that we have set up for all our members at Gulfood 2026. The pavilion looks fantastic, and it is a great forum where people can meet each other, discuss business, and build and grow the nut and dried fruit industry overall."

INC Executive Director Goretti Guasch added: "Gulfood 2026 marked a major milestone for INC. We hosted the largest INC pavilion ever at Gulfood, bringing together 34 co-exhibitors from 14 countries showcasing a truly strong international presence. The INC pavilion once again proved to be a global platform where the entire nut and dried fruit industry can meet under one roof. The new location was fantastic and contributed greatly to the pavilion's overall success."

INC PAVILION in Numbers

34
companies

14
countries

336 m²
pavilion space

Thank you for joining us at Gulfood!


Alpaca
WALNUTS
lifefood


INC
International Nut&DriedFruit
International Nut & Dried Fruit Council
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Discover more about the
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INC Multi-Country Dissemination Plan: Recap and What's Ahead

The Multi-Country Dissemination Campaign continues 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. Building on this momentum, in 2026 the INC will further expand its reach into Southeast Asia, amplifying its impact and inspiring even more consumers to embrace this dynamic lifestyle.

Generation Z is redefining eating patterns around the world. Motivated by transparency, well-being, and self-expression, this cohort is influencing food culture in powerful ways—prompting the INC to position nuts and dried fruit as essential staples in their daily routines. By blending innovative ideas with approaches that have consistently delivered results, we have sustained meaningful interaction and strengthened our relevance among this highly influential demographic.

Impact on Young Consumers Since the Multi-Country Campaign Began in 2022

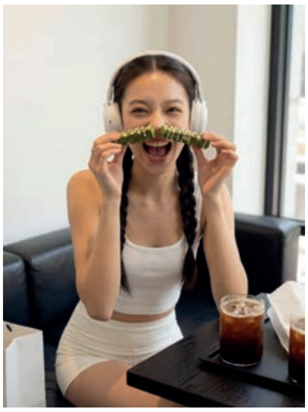
METRIC	China (since 2022)	India (since 2023)	Latin America (since 2024)	TOTAL
Reach	287.2 M	223.2 M	325.7 M	**836.1 M**
Engagement	3.3 M	9.6 M	2.9 M	**15.8 M**
Followers	34,000	155,600	317,600	**517,200**

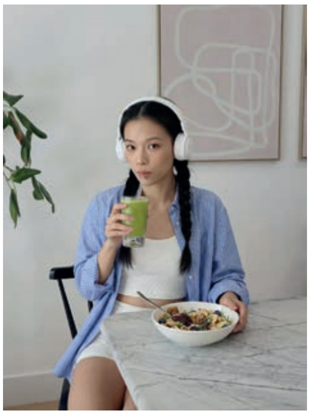
Markets to be Targeted in 2026

Future Directions

CHINA

Sustaining momentum in China remains essential. With an estimated 260 million Gen Z consumers, this cohort exerts an outsized influence on purchasing behaviour. Digitally native and highly attuned to what's new, young Chinese consumers are reshaping how traditional favorites are enjoyed—bringing nuts and dried fruit into modern, trend-led daily routines. Their enthusiasm often extends beyond their own choices, encouraging more frequent consumption and giving these familiar foods renewed relevance.





LATIN AMERICA

Preserving progress in Latin America is also a top priority. The region has one of the world's youngest population profiles, with Gen Z accounting for nearly one quarter of total inhabitants. Connected, curious, and culturally influential, young consumers here are shaping food trends in real time. Encouraging everyday enjoyment of nuts and dried fruit fits naturally with a growing interest in well-being, wholesome ingredients, and convenient ways to nourish busy lives.

INDIA

Maintaining our presence in India is essential. Home to more than 375 million Gen Z consumers—one of the largest youth populations in the world—the country possesses immense long-term potential. Rapid urbanization, rising disposable incomes, and a growing focus on health and fitness are reshaping everyday eating habits. Encouraging young Indians to enjoy nuts and dried fruit as part of their daily routines connects with a digitally savvy, wellness-minded generation that is redefining modern nutrition in exciting ways.

SOUTHEAST ASIA

Southeast Asia is our next focus in 2026. Home to around 185 million Gen Z consumers, the region's vibrant energy and digital dynamism make it a natural step forward. In the year ahead, we'll be expanding into Indonesia, Viet Nam, Thailand, and the Philippines—countries where youthful populations, rising middle classes, and mobile-first lifestyles are shaping new food trends at remarkable speed. Introducing nuts and dried fruit as an easy, everyday snack fits seamlessly into this landscape.

Don't miss the next edition of *Nutfruit*, where we unveil the 2026 campaigns set to make a powerful impact across the globe.

Driving Continued Consumption Through Inspiration and Education

While nuts and dried fruit are established in markets worldwide, keeping them at the forefront of consumers' everyday choices requires continuous inspiration and clear and engaging communication that consistently reinforces their relevance across global markets.

Search for @nutfruitpower on:

As industry leaders, we know the strength of our products. Nuts and dried fruit are established, widely consumed, and backed by strong nutritional credentials. However, maintaining and growing consumption in today's competitive food environment requires consistent visibility, ongoing inspiration, and clear, engaging communication.

Consumer attention is fragmented. Food trends move quickly. New snack options constantly enter the market. Even products with strong reputations must remain relevant and visible to stay top of mind. Continued consumption depends not only on availability, but on inspiration: showing consumers how nuts and dried fruits fit seamlessly into their everyday lives.

Through our Nutfruit consumer social media channels, we actively support this objective by positioning nuts and dried fruit as daily essentials rather than occasional purchases. Our strategy is practical and consumer-focused: inspire usage, reinforce health benefits, and encourage routine integration. And, in 2025 alone, Nutfruit content reached and engaged more than 32 million people worldwide.

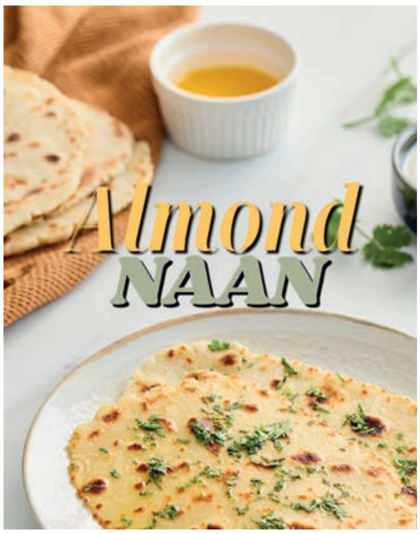
We deliver this through:

- Hundreds of creative, easy-to-follow recipes
- Simple ideas for breakfast, snacks, and main meals
- Visually engaging content tailored for digital platforms
- Clear, accessible communication highlighting health benefits

Our recipe collections are continuously updated to reflect emerging food trends, cultural diversity, and evolving consumer interests. Since our recipe initiative launched in 2017, we have produced over 200 recipes to share all over the world. We also produce short, easy-to-share health benefit videos and distribute a monthly newsletter packed with fresh ideas and inspiration. By refreshing our messaging and visuals, we ensure nuts and dried fruit remain relevant and appealing across generations and markets.

This global communication effort supports the long-term growth of nut and dried fruit consumption. It reinforces positive eating habits, encourages repeat purchase, and strengthens the positioning of nuts and dried fruit as everyday essentials within modern diets.

We encourage all members to actively engage with and share Nutfruit content through your own digital channels, newsletters, and communications. By amplifying these messages collectively, we extend our reach, increase consumer touchpoints, and reinforce consistent, positive messaging across markets.



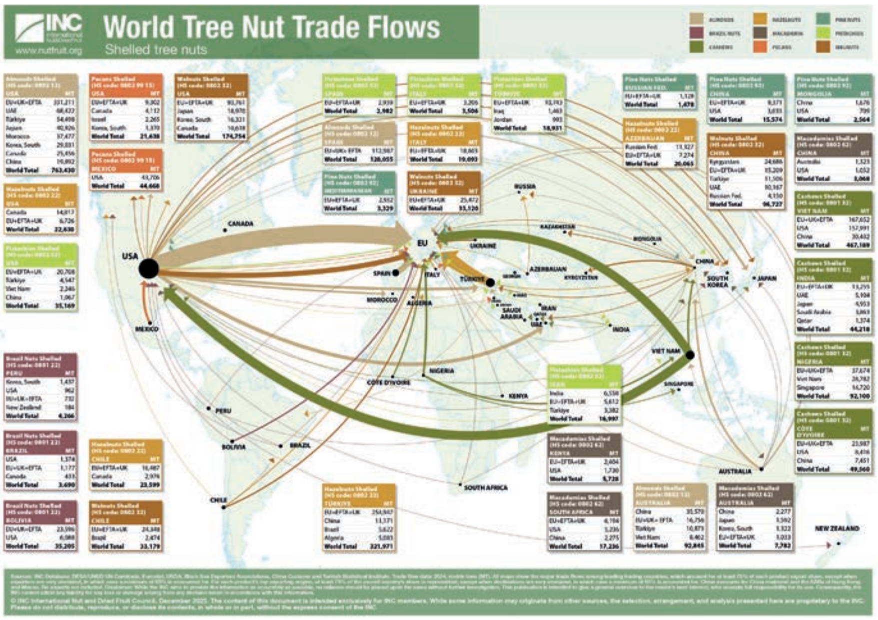
INC Trade Maps: Tracing the Path of Nuts and Dried Fruits Worldwide

The INC has released the latest edition of its Nut and Dried Fruit Trade Map series, one of the industry's most valued statistical reports.

The series features six detailed maps illustrating global and regional trade flows for nuts and dried fruits, highlighting movements between key origins and destinations along with traded volumes. Updated every two years, the Trade Map series is an essential reference for industry professionals, helping them understand complex trade patterns at a glance.

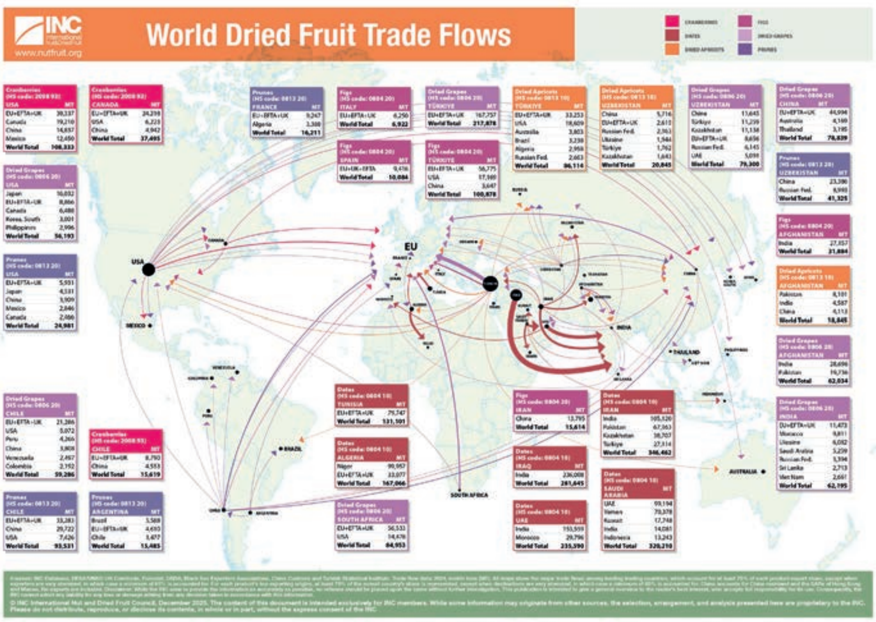
The maps allow readers to visualize key trade flows and volumes for each nut and dried fruit, providing clear insight into the global movement of these products. This series is an invaluable tool for anyone involved in the nut and dried fruit sector.

Members can access the maps in the INC website's members area, along with the Nuts & Dried Fruit Global Statistical Review 2025 Edition, an annual publication offering a decade-in-review of global production, trade, and consumption trends for nuts and dried fruits.



This edition includes:

- **World Tree Nut Trade Flows** (shelled)
- **World Tree Nut Trade Flows** (in-shell)
- **Intra-European Tree Nut Trade Flows** (shelled and in-shell)
- **World Peanut Trade Flows** (shelled and in-shell)
- **World Dried Fruit Trade Flows**
- **Intra-European Dried Fruit Trade Flows**



> *"Updated every two years, the Trade Map series is an essential reference for industry professionals, helping them understand complex trade patterns at a glance."*

INC Delegation Meets With Key Officials at India's Agriculture Ministry

In February, a delegation of INC leadership members held a series of strategic meetings in New Delhi with senior officials from India's Ministry of Agriculture & Farmers Welfare.

Led by INC Chairman Ashok Krishen, the group—which included Executive Committee members Pratap Nair and Michael Waring, as well as INC Ambassador to India Raju Bhatia—met with Horticulture Commissioner Dr. Prabhat Kumar and Joint Secretary Shri Priya Ranjan.

During the meetings, the INC leadership members advocated for free trade as a critical mechanism for maintaining balance between global supply and demand. They also emphasized the need to increase India's domestic consumption through improved market access and enhanced consumer awareness of the health benefits and versatility of nuts and dried fruits. The delegation also highlighted the INC's willingness to support the Indian government in implementing its plan to boost the cultivation of nuts in key producing regions. Both the Horticulture Commissioner and the Secretary of Agriculture put forward to the INC delegation certain suggestions and ways in which, in their opinion, the INC could collaborate with the Indian Ministry of Agriculture improving yields and farmer education in modern agricultural techniques in India.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AMERICAN PEANUT COUNCIL

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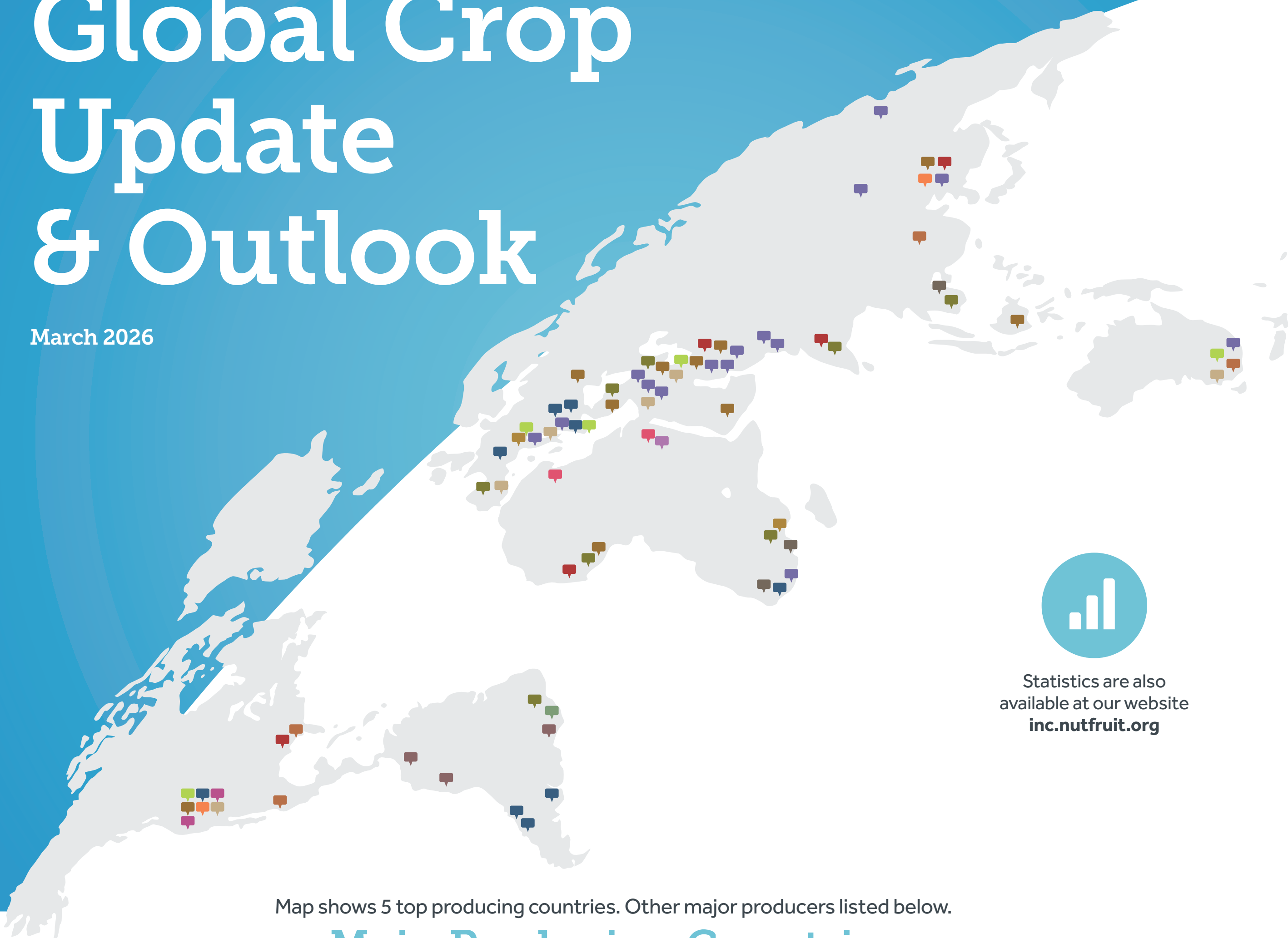
Global Crop Update & Outlook

March 2026



Statistics are also available at our website **inc.nutfruit.org**

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

Main Producing Countries

Almonds		Brazil Nuts		Cashews		Hazelnuts		Macadamias		Pecans		Pine Nuts		Pistachios	
USA	Portugal	Bolivia		Côte d'Ivoire	Ghana	Türkiye	Iran	South Africa	Viet Nam	USA		China	Italy	USA	Australia
Australia	Tunisia	Peru		Cambodia	Guinea	Chile	France	China	Brazil	Mexico		North Korea	Portugal	Iran	Afghanistan
Spain	Chile	Brazil		India	Burkina Faso	USA	Spain	Australia	Colombia	South Africa		Russia	Spain	Türkiye	China
Türkiye	Iran			Tanzania	Brazil	China		Kenya		China		Afghanistan		Syria	
Italy	Greece			Viet Nam	Mozambique	Azerbijan		USA		Australia		Pakistan		Spain	
Morocco				Nigeria	Indonesia	Italy		Guatemala		Brazil		Mongolia		Greece	
China				Guinea-Bissau	Senegal	Georgia		Malawi		Argentina		Türkiye		Italy	

Walnuts		Peanuts		Dates		Dried Apricots		Dried Cranberries		Dried Figs		Prunes		Raisins Sultanas Currants	
China	France	China	Sudan	Saudia Arabia	Israel	Türkiye	South Africa	USA		Türkiye		USA	South Africa	China	Uzbekistan
USA	India	India	Indonesia	Egypt	Morocco	Uzbekistan		Canada		Iran		Chile		India	Argentina
Chile	Argentina	Nigeria	Ghana	UAE	Jordan	Iran		Chile		Afghanistan		France		Türkiye	Afghanistan
Ukraine	Spain	USA	Viet Nam	Tunisia	USA	Takikistan				Spain		Argentina		USA	Australia
Romania	Moldova	Senegal	Côte d'Ivoire	Iran	Oman	Aghanistan				Greece		Serbia		Iran	Greece
Türkiye	Italy	Argentina	Nicaragua	Algeria	Pakistan	China				Italy		Australia		South Africa	
Iran	Portugal	Brazil	South Africa	Iraq	Mexico	USA				USA		Italy		Chile	

Main producers by volume are listed; other producers may exist, and rankings may fluctuate seasonally.

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

Almonds

杏仁 / لوز / बादाम / Almendra / Amêndoas / Amande / Badem

The information contained herein was prepared between late January and February 2026.

USA. The January 2026 Almond Board of California Position Report, published on February 12, showed receipts of 2.627 billion lbs. (approx. 1,191,000 metric tons) crop year-to-date. The 2025/26 receipts were 1.4% lower than the 2024/25 crop through half of the crop year. USDA average inedible reject percentage is estimated at 2.62%, down nearly 0.5% from last year, signifying continued improved crop quality.

Total supply was down 1.8% from last year and August through January total shipments were down 7.04% vs. the same period in CY 2024/25. Domestic shipments of 294 million lbs. (approx. 133,000 MT) through the first half of CY 2025/26 were down 17.9% from 2024/25. Export shipments were down 3.23% at 983 million lbs. (approx. 446,000 MT). Shipments to the Asia/Pacific were down 7%, but exports to the Middle East/Africa were up 5%. Through the first six months, exports to Europe are 310 M lbs. (approx. 141,000 MT), down 3% from CY 2024/25.

According to industry sources, as receipts had nearly caught up with last year's levels, at the time of reporting, the 2025/26 crop was on track to match last year's volume. Looking forward to crop 2026/27, water availability has been good and chill hours sufficient. With bloom getting underway, the industry will be monitoring precipitation and crop development in the coming months.

Australia. As reported by the Almond Board of Australia, the actual intake for the 2025 crop was estimated at 155,697 MT (kernel weight equivalent), slightly above the pre-harvest estimate, but around 7,500 MT below the record 2024 intake of 163,148 MT and nearly 10% under the long-term crop forecast.

With three months of reporting left in the 2025/26 season, demand remained strong, and while sales volumes trailed last season's record performance, they already ranked as the second largest on record. China continued to drive exports—shipments year-to-date through November 2025 tracked 3% above last season's record volume and accounted for around 61% of total exports in 2025/26. For the second consecutive season, in-shell exports outpaced traditional kernel sales.

Looking ahead, the 2026 crop's pre-harvest estimate is 166,892 MT, 7% up on the 2025/26 season's actual intake, with harvest expected to be in full swing by mid-February.

Spain. Production was, at the time of reporting, expected to be in line with the 2024/25 crop. Heavy rainfall in spring 2025 had a significant impact during the flowering period in Andalusia and Extremadura, and hailstorms and cold-drop events in other producing regions further weighed on the output.

This situation was reflected in trade flows. European imports of shelled California almonds from August to December 2025 remained very similar to the previous year (109,794 MT vs. 109,364 MT), while Spain's imports over the same period increased slightly (35,523 MT vs. 29,701 MT). Exports from Spain in September and October 2025 were also very close to last year's levels (30,661 MT vs. 31,261 MT). Although these figures do not differentiate between Spanish and Californian origins, data suggests that the Spanish crop did not exceed the previous season. At the beginning of 2026, the market at origin remained firm, which confirms a tighter supply situation, as well as some retention of remaining stocks by growers.

Until mid-December, temperatures were abnormally high. Since then, colder conditions have prevailed, with good accumulation of chilling hours and abundant rainfall. Overall prospects for the 2026/27 season appear positive.

China. The 2025/26 crop is estimated higher than last season, supported by improved orchard management. Significant new plantings have been recorded across producing origins, and growers currently anticipate a production increase of around 5-10% in 2026/27.

Estimated World Almond Production. Kernel Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA (M lbs,)*	503	2,627	**3,130**	484	484	2,646	**3,130**	625
USA (MT)	228,360	1,192,700	**1,421,060**	219,740	219,740	1,201,300	**1,421,040**	283,750
AUSTRALIA	24,000	163,148	**187,148**	18,000	18,000	155,697	**173,697**	18,000
SPAIN	21,900	105,000	**126,900**	12,000	12,000	105,000	**117,000**	10,700
TÜRKIYE	0	30,000	**30,000**	0	0	35,000	**35,000**	0
ITALY	1,000	21,000	**22,000**	1,000	1,000	23,400	**24,400**	1,100
CHINA	0	16,800	**16,800**	0	0	20,000	**20,000**	0
MOROCCO	2,500	18,000	**20,500**	2,500	2,500	18,100	**20,600**	2,700
PORTUGAL	0	27,300	**27,300**	0	0	16,300	**16,300**	0
TUNISIA	1,000	12,000	**13,000**	1,000	1,000	13,500	**14,500**	1,500
CHILE	0	8,000	**8,000**	0	0	12,800	**12,800**	0
IRAN	2,000	6,000	**8,000**	2,000	2,000	6,100	**8,100**	2,000
GREECE	700	6,000	**6,700**	0	0	5,000	**5,000**	0
OTHERS	0	16,200	**16,200**	0	0	16,300	**16,300**	0
WORLD TOTAL	**281,460**	**1,622,148**	**1,903,608**	**256,240**	**256,240**	**1,628,497**	**1,884,737**	**319,750**
WORLD CONSUMPTION (Supply-End. Stock)				**1,647,368**				

Sources 2024/25: Almond Board of California, Almond Board of Australia, Portugal Nuts, Aegean Exporters' Association, Italian National Institute of Statistics, Chilean Almond Board, Greek Nuts & Fruits Trade Association, and other INC sources. Sources 2025/26: Almond Board of California, Almond Board of Australia, Aegean Exporters' Association, Italian National Institute of Statistics, Chilean Almond Board, Greek Nuts & Fruits Trade Association, and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).*The US crop is adjusted for a 3.14% loss and exempt in 2024/25 and 2% in 2025/26.

Amazonia (Brazil) Nuts

巴西果 / جوز البرازيل / ब्राजील नट्स / Coquito de Brasil / Castanhas do Brasil / Noix de Bresil / Brezilya fingigi

The information contained herein was prepared between late January and February 2026.

Industry sources reported that, by the end of last year, the Brazil nut market had entered a phase of volatility, driven primarily by tightening raw material availability following last season's short crop.

The early closure of processing facilities last season resulted in strong demand for 2026 crop early volumes, pushing raw material prices sharply higher. Processors, eager to restart operations, entered the new season with active procurement strategies. At the same time, while availability in user markets had diminished significantly, certain buyers who keep Brazil nuts listed in their product lines sought early cover, adding further pressure to the start of the season. Additionally, initial deliveries from the 2026 crop progressed more slowly than anticipated, tightening the local market.

Currency dynamics added an additional layer of uncertainty. With Bolivia's new president elected last October and a new administration in place since November, the boliviano (BOB) appreciated, limiting the competitiveness of USD denominated exports and prompting some sellers to pause forward commitments.

On the demand side, interest for near-term shipments remained solid, but the outlook for Q2 onward was, at the time of this report, less certain and largely hinging on retail-driven demand. Ultimately, the capacity of consumer markets to absorb the prevailing elevated prices will determine how demand evolves later in the year. Mid-term demand trends will depend on whether traditional buyers—some of whom have stepped away from Brazil nuts, echoing the situation in 2017—return to the category. Meanwhile, growing interest from Asian markets is providing some momentum on the demand side.

Regarding supply prospects, although it is still too early to offer an accurate assessment of the 2026 crop, expectations at this stage point towards an average harvest in both volume and grade profile, which could allow pricing to ease.

Estimated World Amazonia (Brazil) Nut Production. In-shell Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
BOLIVIA	2,700	78,000	**80,700**	3,000	3,000	46,800	**49,800**	900
PERU	300	14,700	**15,000**	900	900	11,760	**12,660**	300
BRAZIL	900	7,500	**8,400**	300	300	4,500	**4,800**	300
WORLD TOTAL	**3,900**	**100,200**	**104,100**	**4,200**	**4,200**	**63,060**	**67,260**	**1,500**
WORLD CONSUMPTION (Supply-End. Stock)				**99,900**				

Estimated World Amazonia (Brazil) Nut Production. Kernel Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
BOLIVIA	900	26,000	**26,900**	1,000	1,000	15,600	**16,600**	300
PERU	100	4,900	**5,000**	300	300	3,920	**4,220**	100
BRAZIL	300	2,500	**2,800**	100	100	1,500	**1,600**	100
WORLD TOTAL	**1,300**	**33,400**	**34,700**	**1,400**	**1,400**	**21,020**	**22,420**	**500**
WORLD CONSUMPTION (Supply-End. Stock)				**33,300**				

Source: INC. 2024/25 refers to the marketing year from March 2024 to February 2025; and 2025/26 covers March 2025 to February 2026 (harvesting season December-March).

Cashews

腰果 / کاجو / काजू / Anacardo / Castanhas de caju / Noix de caju / Kaju cevizi

The information contained herein was prepared between late January and February 2026.

With the Northern Hemisphere 2025/26 crops largely delivered by the end of 2025, most estimates have been reassessed upwards since the last update. Southern Hemisphere crops are estimated 13% up from the previous season, led by Tanzania, up over 18% from 2024/25. In Brazil, while the 2024/25 crop delivered the strongest output in recent years, the 2025/26 crop has been unexpectedly weak. Overall, the 2025/26 crop, at approximately 6.4 million metric tons of raw cashew nuts, marks a historical high.

Demand for RCN remained firm throughout 2025, supported by higher kernel exports from Viet Nam and increased consumption in India compared with the previous year. Cambodia remained Viet Nam's key RCN supplier, followed by Côte d'Ivoire. The East African crop began arriving in Viet Nam and India in early 2026 and was expected to cover processing requirements for Q1, until the 2026 NH crop arrivals come onto the market.

Year-to-date through December 2025, Vietnamese exports of kernels were up by around 3% year on year, mainly driven by stronger demand from China, Western Asia, and the EU, while domestic demand in India strengthened during the festival season. Supported by a stronger euro, European markets showed forward-buying interest. In the USA, the elimination of tariffs on raw cashew kernels strengthened demand and drove spot prices higher. However, moving forward to the beginning of 2026, in both the USA and EU, forward purchasing has been relatively subdued, as buyers were holding off on coverage until new crop arrivals provide greater clarity on the 2026 NH crop outlook. Demand in Asia softened, reflecting reduced demand from China following the completion of Chinese New Year coverage. In contrast, Japan and Korea remained active, securing volumes to meet Q1 and Q2 requirements.

As of this report, the overall NH 2026 crop outlook looks positive. As per the African Cashew Alliance, some weather disruptions were observed in Cambodia in late 2025, but they have normalized ahead of flowering. Other industry sources reported that early rains in Ghana impacted initial quality levels, but conditions have since stabilized, and an improvement was anticipated. Shipments from West Africa were expected to start around mid-February.

Estimated World Cashew Production. Raw Cashew Nut (RCN) · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CAMBODIA	n/a	800,000	800,000	n/a	n/a	930,000	930,000	n/a
INDIA	n/a	615,000	615,000	n/a	n/a	725,000	725,000	n/a
VIET NAM	n/a	340,000	340,000	n/a	n/a	320,000	320,000	n/a
CÔTE D'IVOIRE	n/a	1,200,000	1,200,000	n/a	n/a	1,500,000	1,500,000	n/a
NIGERIA	n/a	282,000	282,000	n/a	n/a	370,000	370,000	n/a
GUINEA-BISSAU	n/a	240,000	240,000	n/a	n/a	300,000	300,000	n/a
BENIN	n/a	250,000	250,000	n/a	n/a	300,000	300,000	n/a
GHANA	n/a	275,000	275,000	n/a	n/a	275,000	275,000	n/a
BURKINA FASO	n/a	145,000	145,000	n/a	n/a	250,000	250,000	n/a
GUINEA CONAKRY	n/a	145,000	145,000	n/a	n/a	200,000	200,000	n/a
TOGO	n/a	105,000	105,000	n/a	n/a	145,000	145,000	n/a
SENEGAL	n/a	45,000	45,000	n/a	n/a	70,000	70,000	n/a
GAMBIA	n/a	25,000	25,000	n/a	n/a	35,000	35,000	n/a
MALI	n/a	2,000	2,000	n/a	n/a	5,000	5,000	n/a
Subtotal Western Africa	**n/a**	**2,714,000**	**2,714,000**	**n/a**	**n/a**	**3,450,000**	**3,450,000**	**n/a**
Subtotal Northern Hemisphere	**n/a**	**4,469,000**	**4,469,000**	**n/a**	**n/a**	**5,425,000**	**5,425,000**	**n/a**
TANZANIA	n/a	425,000	425,000	n/a	n/a	500,000	500,000	n/a
MOZAMBIQUE	n/a	140,000	140,000	n/a	n/a	140,000	140,000	n/a
KENYA	n/a	5,000	5,000	n/a	n/a	5,000	5,000	n/a
Subtotal Eastern Africa	**n/a**	**570,000**	**570,000**	**n/a**	**n/a**	**645,000**	**645,000**	**n/a**
BRAZIL	n/a	160,400	160,400	n/a	n/a	136,000	136,000	n/a
INDONESIA	n/a	110,000	110,000	n/a	n/a	110,000	110,000	n/a
Subtotal Southern Hemisphere	**n/a**	**840,400**	**840,400**	**n/a**	**n/a**	**891,000**	**891,000**	**n/a**
OTHERS	n/a	56,600	56,600	n/a	n/a	67,300	67,300	n/a
WORLD TOTAL	**n/a**	**5,366,000**	**5,366,000**	**n/a**	**n/a**	**6,383,300**	**6,383,300**	**n/a**
WORLD CONSUMPTION (Supply-End. Stock)				**5,366,000**				

Source: INC. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts in 2025).
Harvest from January 2025 through June 2025 (northern hemisphere) and from Sept 2025 through February 2026 (southern hemisphere).

Hazelnuts

榛子 / بندق / हेज़लनट्स / Avellana / Avelãs / Noisette / Findik

The information contained herein was prepared between late January and February 2026.

Türkiye. As per the Black Sea Hazelnut Exporters' Associations post-harvest assessments, the 2025/26 crop is estimated at 528,000 metric tons in-shell, with kernel yields around 47-48%, and potentially 518,000 MT after additional de-husking losses. Quality is variable, with a larger share of small calibers. At the time of reporting, supply was expected to remain adequate, supported by carryover, stronger outputs in other origins and softer demand.

Prices hit a record in September, corrected in November-December and steadied in January before continuing a downward trend. Exports through January were 51% below last season, which may lead to a sizeable carryover, though industry expected stronger demand later. Large buyers have secured cover through Q1 and Q2, while short-term inquiries were coming from mid-size and smaller processors. Exporters, supported by ample inventories and favorable 2026 crop progress, were prepared to extend offers into Q3 and possibly Q4. Domestic consumption was set to decline as leading buyers cut back purchases, unable to pass higher prices on to consumers. The final balance of the season will depend on export performance, caliber availability and timing of industrial coverage.

Chile. After significant crop size growth and remarkable yields in 2025, the 2026 crop is expected to be roughly 120,000 MT in-shell. Winter and spring weather has been favorable with enough chilling hours and good conditions for pollination. With more hectares coming into production, the industry continues investing in infrastructure.

USA. The quality of the 2025 crop was excellent as the volume continues to grow. Kernel defects were low, with sizing slightly above average. Adequate early-season weather set expectations for a stable 2026 crop. Given increased pricing worldwide, many discretionary buyers have avoided using hazelnut wherever possible. High farmgate returns have encouraged growers to again consider planting additional area.

China. The 2025/26 crop is estimated higher than last year, driven by increased new acreage starting to bear. Production is expected to reach 100,000 MT in 2026.

Estimated World Hazelnut Production. In-shell Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
TÜRKIYE	135,000	785,000	**920,000**	150,000	150,000	518,000	**668,000**	150,000
CHILE	2,600	58,500	**61,100**	1,500	1,500	120,700	**122,200**	2,000
USA	1,000	89,000	**90,000**	1,000	1,000	110,000	**111,000**	3,000
CHINA	2,000	55,000	**57,000**	1,500	1,500	88,000	**89,500**	2,000
ITALY	2,000	87,000	**89,000**	5,000	5,000	65,000	**70,000**	1,000
AZERBAIJAN	4,000	65,000	**69,000**	0	0	60,000	**60,000**	1,000
GEORGIA	1,400	45,000	**46,400**	500	500	45,000	**45,500**	500
IRAN	2,000	18,000	**20,000**	0	0	24,000	**24,000**	1,200
FRANCE	2,000	6,500	**8,500**	0	0	9,000	**9,000**	0
SPAIN	500	12,000	**12,500**	600	600	7,500	**8,100**	400
OTHERS	0	31,600	**31,600**	0	0	33,100	**33,100**	0
WORLD TOTAL	**152,500**	**1,252,600**	**1,405,100**	**160,100**	**160,100**	**1,080,300**	**1,240,400**	**161,100**
WORLD CONSUMPTION (Supply-End. Stock)				**1,245,000**				

Estimated World Hazelnut Production. Kernel Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
TÜRKIYE	67,500	392,500	**460,000**	75,000	75,000	246,100	**321,100**	71,300
CHILE	1,120	25,700	**26,820**	660	660	53,100	**53,760**	880
USA	440	39,600	**40,040**	440	440	48,400	**48,840**	1,320
CHINA	800	22,000	**22,800**	600	600	35,200	**35,800**	800
ITALY	910	38,300	**39,210**	2,200	2,200	28,000	**30,200**	430
AZERBAIJAN	1,500	24,700	**26,200**	0	0	21,500	**21,500**	360
GEORGIA	500	15,750	**16,250**	175	175	15,800	**15,975**	175
IRAN	840	7,560	**8,400**	0	0	10,100	**10,100**	500
FRANCE	800	2,600	**3,400**	0	0	3,600	**3,600**	0
SPAIN	225	5,400	**5,625**	270	270	3,400	**3,670**	180
OTHERS	0	13,300	**13,300**	0	0	13,800	**13,800**	0
WORLD TOTAL	**74,635**	**587,410**	**662,045**	**79,345**	**79,345**	**479,000**	**558,345**	**75,945**
CONSUMPTION (Supply-End. Stock)				**582,700**				

Sources: Black Sea Hazelnut and Products Exporters' Associations, Hazelnut Committee of Chile, China Chamber of Commerce for Import and Export of Foodstuffs, Georgian Hazelnut Growers Association, AEOFRUSE, and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

Macadamias

夏威夷果 / مكاداميا / मैकाडामिया / Macadamia / Macadâmias / Macadamia / Makedemia cevizi

The information contained herein was prepared between late January and early March 2026.

China. According to the China Chamber of Commerce, the 2025 crop is estimated at 105,000 metric tons at 10% nut-in-shell moisture content (98,000 MT at 3.5%). Yunnan accounted for 76% of the total crop, followed by Guangxi (19%) and Guangdong (5%). Favorable rainfall ahead of bloom and during nut set supported development, no major flooding occurred during harvest, and improved farm management further boosted output. Newly introduced, well-adapted varieties have also begun bearing. Looking ahead, the 2026 crop is expected to rise by 10-20%, assuming good growing conditions.

South Africa. As reported by Macadamias South Africa (SAMAC), the 2026 crop is preliminarily forecasted at 95,000 MT at 1.5% NIS moisture content (96,700 MT at 3.5%).

Following a disappointing 2025 crop, the outlook for 2026 is cautiously positive, given favorable weather conditions. Furthermore, a number of younger orchards are now entering commercial production, which is expected to contribute to moderate overall crop growth despite lower crop inputs on the back of lower prices. However, at the time of writing, it was still early in the cycle, so an accurate estimate was not yet possible.

Australia. As per the Australian Macadamia Society, the 2026 crop is predicted to reach 59,080 MT at 3.5% NIS moisture content, according to a climate-based scientific model developed by the Queensland Department of Agriculture and Fisheries.

The forecast represents a strong recovery on the 2025 crop, which followed one of the most challenging seasons on record. Early indicators are encouraging, with improved growing conditions and younger plantings moving into their bearing and full production stages.

Estimated World Macadamia Production. In-shell Basis · Metric Tons

Country	2025				2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	n/r	98,000	**98,000**	n/r	n/r	108,000	**108,000**	n/r
SOUTH AFRICA*	n/r	83,400	**83,400**	n/r	n/r	96,700	**96,700**	n/r
AUSTRALIA	n/r	43,800	**43,800**	n/r	n/r	59,080	**59,080**	n/r
KENYA	n/r	47,500	**47,500**	n/r	n/r	51,850	**51,850**	n/r
USA	n/r	15,500	**15,500**	n/r	n/r	16,600	**16,600**	n/r
GUATEMALA	n/r	11,000	**11,000**	n/r	n/r	13,000	**13,000**	n/r
MALAWI	n/r	10,000	**10,000**	n/r	n/r	11,000	**11,000**	n/r
VIET NAM	n/r	8,000	**8,000**	n/r	n/r	9,000	**9,000**	n/r
BRAZIL	n/r	4,500	**4,500**	n/r	n/r	6,500	**6,500**	n/r
COLOMBIA	n/r	1,150	**1,150**	n/r	n/r	1,250	**1,250**	n/r
OTHERS	n/r	18,200	**18,200**	n/r	n/r	20,000	**20,000**	n/r
WORLD TOTAL	**n/r**	**341,050**	**341,050**	**n/r**	**n/r**	**392,980**	**392,980**	**n/r**
ESTIMATED WORLD CONSUMPTION (Supply-End, Stock)				**336,885**				

Estimated World Macadamia Production. Kernel Basis · Metric Tons

Country	2025				2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	n/r	24,500	**24,500**	n/r	n/r	27,000	**27,000**	n/r
SOUTH AFRICA*	n/r	26,700	**26,700**	n/r	n/r	30,900	**30,900**	n/r
AUSTRALIA	n/r	13,800	**13,800**	n/r	n/r	18,906	**18,906**	n/r
KENYA	n/r	9,500	**9,500**	n/r	n/r	10,370	**10,370**	n/r
USA	n/r	3,400	**3,400**	n/r	n/r	3,600	**3,600**	n/r
GUATEMALA	n/r	2,250	**2,250**	n/r	n/r	2,665	**2,665**	n/r
MALAWI	n/r	2,500	**2,500**	n/r	n/r	2,800	**2,800**	n/r
VIET NAM	n/r	2,200	**2,200**	n/r	n/r	2,475	**2,475**	n/r
BRAZIL	n/r	1,125	**1,125**	n/r	n/r	1,625	**1,625**	n/r
COLOMBIA	n/r	230	**230**	n/r	n/r	250	**250**	n/r
OTHERS	n/r	3,600	**3,600**	n/r	n/r	4,000	**4,000**	n/r
WORLD TOTAL	**n/r**	**89,805**	**89,805**	**n/r**	**n/r**	**104,591**	**104,591**	**n/r**
ESTIMATED WORLD CONSUMPTION (Supply-End. Stock)				**88,705**				

Sources: China Chamber of Commerce for Import and Export of Foodstuffs, Macadamias South Africa, Australian Macadamia Society, Brazilian Macadamia Association, and other INC sources. Reported at 3.5% nut-in-shell moisture content. n/r: not reported or not relevant. *Macadamias South Africa reports at 1.5% NIS m.c., the 3.5% figure is based on INC calculations.

Pecans

碧根果 / بقان / पेकान / Pacana / Nozes / Noix de pécan / Pekan cevizi

The information contained herein was prepared between late January and February 2026.

USA. Due to the US government shutdown last October, the USDA did not publish an estimate of the 2025/26 crop. The final estimate is projected to be published in May. As such, based on the average of the three industry pre-harvest crop forecasts, the US estimate remains unchanged from the last update, at 129,502 metric tons, in-shell basis. While production is estimated to be 7.7% higher than in 2024, tighter opening inventories—down by approximately 12.5% year on year—are expected to keep total US supply broadly unchanged. However, data from the American Pecan Council indicate that 85.2% of these opening stocks were already allocated to meet 2024 contract commitments.

Additionally, the significantly smaller Mexican crop, 80% of which is usually shipped to the US, has led to a reduction in the available supply to US processors of 25.1%. Consequently, prices have risen dramatically, for both in-shell and kernels, and were, at the time of reporting, expected to remain firm through 2026.

Mexico. With the national output constrained by drought over the last few seasons, the 2025 crop remained subdued. As reported by the Mexican Pecan Council (Comenuez), by mid-January, the 2026 harvest was largely complete across major producing regions, with overall good quality reported. In Chihuahua, trading focused on higher quality and larger sizes, with firm prices. In Sonora, Coahuila, Comarca Lagunera and Durango, domestic prices were broadly stable. In Durango, quality was good, but volume was estimated to be around 30% lower year on year.

South Africa. South Africa experienced a record crop in 2025 due to young orchards maturing. Approximately 95% of the crop was exported as in-shell to China as demand was strong due to the trade disputes between the USA and China. Consequently, there are low levels of carryover. At the time of reporting, the outlook for the 2026 season was positive as young orchards mature and come into production, but there were concerns that excessive rain in the northern and eastern growing regions could temper the projected growth slightly.

China. The 2025/26 crop is slightly smaller than initially expected, due to heavy rainfall during the bloom and harvest. Given favorable weather, production in 2026 could reach around 12,000 MT.

Estimated World Pecan Production. In-shell Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA	69,000	120,200	**189,200**	60,300	60,300	129,500	**189,800**	65,800
MEXICO	2,000	129,600	**131,600**	2,000	2,000	95,000	**97,000**	2,000
SOUTH AFRICA	700	37,500	**38,200**	1,000	1,000	50,250	**51,250**	1,000
CHINA	50	3,500	**3,550**	20	20	6,000	**6,020**	50
AUSTRALIA	0	2,540	**2,540**	0	0	3,600	**3,600**	0
BRAZIL	0	2,000	**2,000**	0	0	3,500	**3,500**	0
ARGENTINA	0	3,000	**3,000**	0	0	3,000	**3,000**	0
OTHERS	0	3,600	**3,600**	0	0	3,500	**3,500**	0
WORLD TOTAL	**71,750**	**301,940**	**373,690**	**63,320**	**63,320**	**294,350**	**357,670**	**68,850**
WORLD CONSUMPTION (Supply-End. Stock)				**310,370**				

Estimated World Pecan Production. Kernel Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA	34,500	60,100	**94,600**	30,200	30,200	64,800	**95,000**	32,900
MEXICO	1,000	64,800	**65,800**	1,000	1,000	47,500	**48,500**	1,000
SOUTH AFRICA	350	18,750	**19,100**	500	500	25,400	**25,900**	505
CHINA	25	1,750	**1,775**	10	10	3,000	**3,010**	25
AUSTRALIA	0	1,320	**1,320**	0	0	1,870	**1,870**	0
BRAZIL	0	900	**900**	0	0	1,750	**1,750**	0
ARGENTINA	0	1,500	**1,500**	0	0	1,500	**1,500**	0
OTHERS	0	1,800	**1,800**	0	0	1,750	**1,750**	0
WORLD TOTAL	**35,875**	**150,920**	**186,795**	**31,710**	**31,710**	**147,570**	**179,280**	**34,430**
WORLD CONSUMPTION (Supply-End. Stock)				**155,085**				

Sources: South African Pecan Nut Producers Association, Associação Brasileira de Nozes, Castanhas e Frutas Secas, Argentine Pecan Committee, and other INC sources.
Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

Pine Nuts

松子 / صنوبر / पाइन नट्स / Piñón / Pinhões / Pignon / Çam fistigi

The information contained herein was prepared between late January and February 2026.

China. As reported by the China Chamber of Commerce, in 2025, the pine nut market reflected a balance between limited supply and sluggish consumption.

On the supply side, reduced *Pinus koraiensis* output, together with a widening import gap for *P. sibirica* kernels, drove a steady rise in the pine nut kernel market toward the end of 2025 and beginning of 2026, as lower global production constrained imports and widened the domestic supply gap.

On the demand side, rising prices dampened end-consumer willingness, leading to weaker demand in some mass-consumption segments. This limited consumer affordability and, in turn, restrained the scale of price increases, resulting in phased, intermittent gains within an overall upward trend rather than a broad surge.

At the time of reporting, the pine nut market was expected to maintain a tight supply and high-price environment in the first half of 2026. The production shortfall of *P. koraiensis* was unlikely to be filled in the short term, the recovery of *P. sibirica* kernel imports remained gradual, and the supplementary effect of the *P. yunnanensis* bumper harvest was expected to diminish, collectively supporting elevated price levels. At the same time, sluggish end-consumer demand is unlikely to improve quickly, continuing to limit the pace of price increases and resulting in a volatile but upward price trend.

Estimated World Pine Nut Production. In-shell Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
ASIA (Pinus koraiensis, P. sibirica, P yunnanensis and P. gerardiana)								
CHINA	20,000	111,500	**131,500**	30,000	30,000	30,000	**60,000**	1,500
NORTH KOREA	2,000	30,000	**32,000**	4,000	4,000	20,000	**24,000**	6,000
RUSSIA (Siberia)	800	15,000	**15,800**	1,000	1,000	11,000	**12,000**	500
AFGHANISTAN	320	2,300	**2,620**	720	720	7,800	**8,520**	2,600
PAKISTAN	980	800	**1,780**	480	480	5,200	**5,680**	1,700
MONGOLIA	1,000	7,000	**8,000**	600	600	2,000	**2,600**	300
SUBTOTAL	**25,100**	**166,600**	**191,700**	**36,800**	**36,800**	**76,000**	**112,800**	**12,600**
MEDITERRANEAN (Pinus pinea)								
TÜRKIYE	510	5,450	**5,960**	1,100	1,100	7,600	**8,700**	4,600
ITALY	0	625	**625**	0	0	500	**500**	50
PORTUGAL	310	500	**810**	60	60	60	**120**	0
SPAIN	250	500	**750**	150	150	50	**200**	0
OTHERS	0	330	**330**	0	0	380	**380**	0
SUBTOTAL	**1,070**	**7,405**	**8,475**	**1,310**	**1,310**	**8,590**	**9,900**	**4,650**
WORLD TOTAL	**26,170**	**174,005**	**200,175**	**38,110**	**38,110**	**84,590**	**122,700**	**17,250**
WORLD CONSUMPTION (Supply-End. Stock)				**162,065**				

Estimated World Pine Nut Production. Kernel Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
ASIA (Pinus koraiensis, P. sibirica, P yunnanensis and P. gerardiana)								
CHINA	5,000	27,875	**32,875**	7,500	7,500	7,500	**15,000**	7,500
NORTH KOREA	500	7,500	**8,000**	1,000	1,000	5,000	**6,000**	1,500
RUSSIA (Siberia)	260	4,450	**4,710**	300	300	4,000	**4,300**	180
AFGHANISTAN	160	1,180	**1,340**	370	370	4,000	**4,370**	1,330
PAKISTAN	490	410	**900**	245	245	2,650	**2,895**	870
MONGOLIA	250	1,750	**2,000**	150	150	660	**810**	100
SUBTOTAL	**6,660**	**43,165**	**49,825**	**9,565**	**9,565**	**23,810**	**33,375**	**11,480**
MEDITERRANEAN (Pinus pinea)								
TÜRKIYE	120	1,280	**1,400**	250	250	1,750	**2,000**	1,060
ITALY	0	125	**125**	0	0	100	**100**	10
PORTUGAL	65	100	**165**	12	12	12	**24**	0
SPAIN	48	100	**148**	30	30	10	**40**	0
OTHERS	0	70	**70**	0	0	80	**80**	0
SUBTOTAL	**233**	**1,675**	**1,908**	**292**	**292**	**1,952**	**2,244**	**1,070**
WORLD TOTAL	**6,893**	**44,840**	**51,733**	**9,857**	**9,857**	**25,762**	**35,619**	**12,550**
WORLD CONSUMPTION (Supply-End. Stock)				**41,876**				

Sources: China Chamber of Commerce for Import and Export of Foodstuffs, and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY (e.g., 2025/26 starts as of 2025 harvest).

Pistachios

开心果 / فستق / पिस्ता / Pistacho / Pistácios / Pistache / Antep fistigi

The information contained herein was prepared between late January and February 2026.

USA. The 2025/26 California crop, an on year, is finishing at a record-breaking 713,300 metric tons (1.57 billion pounds), up 42% from last year's crop.

Year-to-date total shipments as of December 2025 were 223,000 MT (491 M lbs.), a 23% increase from last year, and just 4% lower than 2023's record of 256,000 MT (511 M lbs.). All markets continue to show strong demand. Domestic shipments hit a record year-to-date through December of 39,000 MT (86 M lbs.). Europe shipments also hit a record of 50,350 MT (111 M lbs.). Demand to both Asia and the Middle East/Africa remains strong due to Chinese New Year and Ramadan, reaching 90,700 MT (200 M lbs.) and 33,100 MT (73 M lbs.), respectively. This strong demand underlines the positive momentum for long-term category growth.

Iran. As reported by the Iran Pistachio Association, as of late December, acute intraday exchange rate volatility disrupted trade across multiple sectors. The resulting unstable market environment, in addition to hyperinflation, led to nationwide protests in January. Sudden changes to export license regulations, followed by internet and government shutdowns due to the street protests, resulted in a decline in exports. Monthly shipments (December 22 to January 20) capped 14,000 MT, in-shell equivalent, down 26% vs. the same month last year. Year-to-date total exports to Türkiye, the CIS, the Indian subcontinent and the Middle East remained strong, increasing their market share year on year. In contrast, the Far East was experiencing a substantial decline, with its share falling from around 34% to 9%.

The share of kernel shipments has been increasing from the start of this marketing year. Strong demand was driven by pile-up for Ramadan (particularly in the UAE), increased imports for domestic consumption in Türkiye, and post-Diwali consumption in India, along with a consistent increase in global kernel demand.

In-shell trade remained relatively sluggish—affected by exchange-rate volatility and rial depreciation—while the kernel market was growing, despite rising prices. Consequently, the price gap between commercial in-shell pistachios intended for retail snacking and kernel raw material (including closed-shells and shelling stocks) narrowed significantly. This reflects a rising market floor driven by kernels, while in-shell pistachios have struggled to advance due to weaker demand at higher price levels.

Türkiye. While exports have been minimal since harvest, domestic activity has remained strong. Following the introduction of import allowances, exporters were expecting a price correction that did not materialize, as imports had limited market impact. Smaller processors were able to use imported product as a substitute, while larger industrial users were unable to reformulate established recipes.

Although another off-crop season is anticipated for 2026/27, January's abundant snowfall could boost the new crop volume. Turkish pistachios are not expected to gain a competitive advantage in global markets next season, though they should continue to support demand in established export channels as well as in the domestic market, where usage in value-added products remains strong.

Spain. Production and demand continued to show a slow but steady increase, reflected in the growing number of planted orchards and continued investment in new plantations. However, the investor profile is moving away from family-scale towards agricultural financial investors. This could improve efficiency but may also limit access to land and inputs for small and medium-sized producers.

The EU remains the main market for Spanish pistachios, supported by logistical advantages. However, limited volumes, uneven quality, high prices, and a still low level of industry professionalization—despite some recent industrial initiatives—remain key constraints. Nonetheless, further development is expected over the coming years.

China. The 2025/26 crop remains in line with initial expectations. Cultivation continues to expand into new growing areas, notably in Gansu and Shanxi provinces. The 2026 crop is currently forecasted at around 400-450 MT.

Estimated World Pistachio Production. In-shell Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA (M lbs.)	185	1,109	**1,294**	115	115	1,571	**1,686**	400
USA (MT)	83,900	503,700	**587,600**	52,300	52,300	713,300	**765,600**	181,600
IRAN	30,000	217,000	**247,000**	15,000	15,000	225,000	**240,000**	20,000
TÜRKIYE	50,000	415,500	**465,500**	243,400	243,400	114,600	**358,000**	192,400
SYRIA	0	28,050	**28,050**	0	0	13,350	**13,350**	0
SPAIN	0	4,500	**4,500**	0	0	9,500	**9,500**	0
GREECE	0	6,000	**6,000**	0	0	6,000	**6,000**	0
ITALY	0	2,800	**2,800**	300	300	4,700	**5,000**	470
AUSTRALIA	0	4,450	**4,450**	0	0	3,000	**3,000**	0
AFGHANISTAN	0	2,500	**2,500**	0	0	2,600	**2,600**	0
CHINA	0	300	**300**	0	0	320	**320**	0
WORLD TOTAL	**163,900**	**1,184,800**	**1,348,700**	**311,000**	**311,000**	**1,092,370**	**1,403,370**	**394,470**
WORLD CONSUMPTION (Supply-End. Stock)				**1,037,700**				

Sources: Iran Pistachio Association, Greek Nuts & Fruits Trade Association, Australia Pistachio Growers' Association, and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

Walnuts

核桃 / الجوز / अखरोट / Nuez / Nozes / Noix / Ceviz

The information contained herein was prepared between late January and February 2026.

China. A lower 2025/26 crop and carryover, and robust early-season demand, drove prices up 20-30% year on year. September-December kernel shipments surged 35% to 80,015 metric tons, while in-shell declined 13% to 128,170 MT, keeping the in-shell equivalent 9.6% above last season.

While prices remained firm ahead of the Spring Festival, exporters expected a post-holiday softening, influenced by the local market—over 80% of total demand.

USA. According to California Walnuts, the 2025/26 season began with one of the lowest carry-in inventories in years, largely sold out when the new crop started shipping. Reports indicated larger sizes and higher edible meat yields, key for in-shell buyers. The January shipment report showed receipts in excess of 807,300 short tons, in-shell basis (732,400 MT), 13.7% above the USDA NASS estimate.

December in-shell sales hit near-record levels in destinations such as Türkiye and the UAE. Core kernel markets also showed strong gains, including Germany (+75%), the Netherlands (+47%) and the UAE (+50%), notably a non-traditional importer of kernels.

Chile. As of December 31, 2025, exports exceeded 169,600 MT in-shell equivalent, with additional shipments expected ahead of the 2026 harvest. With adequate chill accumulation and rainfall within normal ranges, the upcoming crop is forecasted at around 170,000 MT.

Estimated World Walnut Production. In-shell Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	50,000	1,550,000	**1,600,000**	20,000	20,000	1,500,000	**1,520,000**	60,000
USA	83,000	547,000	**630,000**	63,000	63,000	732,400	**795,400**	63,500
CHILE	540	134,600	**135,140**	400	400	175,000	**175,400**	600
UKRAINE	1,000	88,800	**89,800**	1,600	1,600	89,700	**91,300**	1,200
ROMANIA	1,000	40,000	**41,000**	1,200	1,200	53,000	**54,200**	800
TÜRKIYE	0	48,000	**48,000**	0	0	52,500	**52,500**	0
IRAN	0	35,000	**35,000**	0	0	38,700	**38,700**	0
FRANCE	0	25,000	**25,000**	0	0	35,000	**35,000**	0
INDIA	10,000	33,000	**43,000**	3,500	3,500	30,000	**33,500**	3,000
ARGENTINA	1,000	21,000	**22,000**	0	0	22,000	**22,000**	1,000
MOLDOVA	300	17,700	**18,000**	100	100	18,400	**18,500**	300
SPAIN	0	13,000	**13,000**	0	0	17,000	**17,000**	0
ITALY	0	14,900	**14,900**	0	0	16,000	**16,000**	0
PORTUGAL	0	11,100	**11,100**	0	0	12,000	**12,000**	0
HUNGARY	0	14,000	**14,000**	0	0	11,900	**11,900**	200
OTHERS	0	26,000	**26,000**	0	0	25,500	**25,500**	0
WORLD TOTAL	**146,840**	**2,619,100**	**2,765,940**	**89,800**	**89,800**	**2,829,100**	**2,918,900**	**130,600**
WORLD CONSUMPTION (Supply-End. Stock)				**2,676,140**				

Estimated World Walnut Production, Kernel Basis · Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	22,000	682,000	**704,000**	8,800	8,800	660,000	**668,800**	26,400
USA*	36,500	240,700	**277,200**	27,700	27,700	322,300	**350,000**	27,900
CHILE	255	61,900	**62,155**	185	185	81,375	**81,560**	279
UKRAINE	410	34,600	**35,010**	620	620	35,880	**36,500**	480
ROMANIA	440	17,600	**18,040**	530	530	21,500	**22,030**	320
TÜRKIYE	0	19,200	**19,200**	0	0	21,000	**21,000**	0
IRAN	0	14,400	**14,400**	0	0	15,900	**15,900**	0
FRANCE	0	10,500	**10,500**	0	0	14,700	**14,700**	0
INDIA	3,300	10,900	**14,200**	1,150	1,150	9,900	**11,050**	990
ARGENTINA	430	9,000	**9,430**	0	0	9,900	**9,900**	450
MOLDOVA	132	7,300	**7,432**	40	40	7,400	**7,440**	120
SPAIN	0	5,200	**5,200**	0	0	6,800	**6,800**	0
ITALY	0	6,700	**6,700**	0	0	7,200	**7,200**	0
PORTUGAL	0	5,000	**5,000**	0	0	5,400	**5,400**	0
HUNGARY	0	6,000	**6,000**	0	0	4,800	**4,800**	80
OTHERS	0	11,200	**11,200**	0	0	11,200	**11,200**	0
WORLD TOTAL	**63,467**	**1,142,200**	**1,205,667**	**39,025**	**39,025**	**1,235,255**	**1,274,280**	**57,019**
WORLD CONSUMPTION (Supply-End. Stock)				**1,166,642**				

Sources: California Walnut Board and Commission, Chilenut, Walnut Growers Association of Türkiye, Portugal Nuts and other INC sources. *California Walnut Board and Commission does not measure in kernel basis. Kernel equivalent is an INC estimation. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

Peanuts

花生 / فول سوداني / मूंगफली / Cacahuete / Amendoins / Cacahuète / Yer fistigi

The information contained herein was prepared between late January and February 2026.

China. As reported by the China Chamber of Commerce, China's total 2025/26 peanut output was, at the time of this report, expected to be on par with that of the previous year, just 2% up from 2024/25. Domestic peanut supply remained relatively ample. Against the backdrop of inverted domestic and international prices, coupled with factors such as Sino-US trade frictions and hampered exports from African countries, peanut imports plummeted by 65% to 265,200 metric tons. However, affected by weather disruptions, the overall quality of peanuts this season has declined, the supply of edible-grade peanuts has decreased, and market prices have stayed in a low range. Senegal recently announced the resumption of peanut exports, which was expected to exert an impact on imports from Argentina and Brazil.

USA. According to the early 2026 USDA reports, 2025/26 production was estimated at 3.3 million MT, reflecting an 11% increase over 2024/25. Planted area was estimated at 790,360 hectares, up 8% year on year, while harvested area was estimated at 771,340 ha, a 9% percent rise from the previous season. Average yields are reported at 4.22 MT/ha, also above last year's level. Georgia was, at the time of reporting, expected to reach record production and Arkansas to achieve a record harvested area.

As per data released by the USDA National Agricultural Statistics Service (NASS), US peanut stocks in commercial storage reached 2.50 M MT of farmer stock equivalent as of December 31, 2025, including 2.10 MT of actual farmer stock, compared with 1.98 M MT a year earlier.

Argentina. According to the USDA, planted area in 2024 (corresponding to the 2025 harvest) was reported at 532,000 ha, in line with the 521,229 ha recorded by the Argentine Chamber of Peanuts (CAM), representing a significant increment as compared with the previous year. A considerable number of growers planted peanut for the first time in 2024, encouraged by attractive prices at sowing and comparatively weaker returns in alternative crops. However, as expanded area translated into a higher output, prices eased significantly by harvest 2025, weighing on producer margins and curbing planting intentions for 2025 (harvest 2026). In addition, the agronomic demands of peanut cultivation and comparatively higher management costs have prompted many of these first-time producers to withdraw from the crop in the 2025 planting season. Consequently, peanut planted area for the 2026 harvest is estimated at 400,000 ha by the USDA and at 389,000 ha by the CAM, representing a sharp decline of 132,000 ha from last year.

As per the USDA's January 2026 Oilseeds and Product Update, peanut export expectations for the current marketing year (as of the onset of the 2025 harvest) were reviewed upward to 1.10 M MT (in shell basis), above the previous projection. The adjustment is driven by the strong year-to-date shipment pace and supported by abundant domestic availability following this season's sizable crop, along with firm demand from major destinations such as the EU and Australia.

Estimated World Peanut Production. In-shell Basis · 1000 Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	796	18,400	**19,196**	679	679	18,800	**19,479**	680
INDIA	305	7,100	**7,405**	357	357	7,500	**7,857**	359
NIGERIA	502	5,085	**5,587**	491	491	5,241	**5,732**	511
USA	672	2,943	**3,615**	709	709	3,257	**3,966**	1,046
ARGENTINA	60	1,605	**1,665**	127	127	1,895	**2,022**	232
BRAZIL	7	734	**741**	44	44	1,160	**1,204**	87
SENEGAL	378	796	**1,174**	318	318	1,150	**1,468**	268
SUDAN	500	1,684	**2,184**	324	324	1,000	**1,324**	324
INDONESIA	104	880	**984**	105	105	830	**935**	91
GHANA	48	625	**673**	27	27	600	**627**	27
VIET NAM	44	388	**432**	32	32	378	**410**	30
CÔTE D'IVOIRE	0	240	**240**	0	0	240	**240**	0
NICARAGUA	0	196	**196**	0	0	186	**186**	0
SOUTH AFRICA	11	69	**80**	18	18	85	**103**	26
MEXICO	23	85	**108**	27	27	84	**111**	27
OTHERS	722	10,046	**10,768**	729	729	10,037	**10,766**	724
WORLD TOTAL	**4,172**	**50,876**	**55,048**	**3,987**	**3,987**	**52,443**	**56,430**	**4,432**
WORLD CONSUMPTION (Supply-End. Stock)				**51,061**				

Sources: China Chamber of Commerce for Import and Export of Foodstuffs, USDA, Argentine Chamber of Peanuts (CAM), and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

Dates

枣 / تمر / खजूर / Dátil / Tâmaras / Datte / Hurma

The information contained herein was prepared between late January and February 2026.

Since the previous report, there have been no major changes to the overall market outlook. However, Tunisia and Algeria's 2025/26 estimates were revised upward, reflecting a sizeable and good-quality crop, resulting in increased available supply and carryover. Global date production continues to expand as newly planted orchards reach maturity across most producing countries. Demand for table dates remains solid, particularly for Deglet Noor (Tunisia, Algeria, Israel, California) and Medjool (Saudi Arabia, Egypt, Morocco, Jordan, Israel), with Medjool gaining ground in the international market.

Estimated World Table Date Production. Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
SAUDI ARABIA	110,000	270,000	**380,000**	115,000	115,000	290,000	**405,000**	120,000
EGYPT	20,000	180,000	**200,000**	22,000	22,000	190,000	**212,000**	23,000
UAE	40,000	170,000	**210,000**	44,000	44,000	170,000	**214,000**	44,000
TUNISIA	15,000	100,000	**115,000**	1,000	1,000	150,000	**151,000**	25,000
IRAN	7,500	130,000	**137,500**	7,000	7,000	130,000	**137,000**	7,000
ALGERIA	20,000	65,000	**85,000**	2,000	2,000	90,000	**92,000**	30,000
IRAQ	12,000	70,000	**82,000**	15,000	15,000	70,000	**85,000**	15,000
ISRAEL	1,000	55,000	**56,000**	1,000	1,000	60,000	**61,000**	1,000
MOROCCO	6,000	40,000	**46,000**	8,000	8,000	40,000	**48,000**	8,500
JORDAN	4,600	22,000	**26,600**	4,500	4,500	26,000	**30,500**	4,800
USA	12,000	25,000	**37,000**	11,000	11,000	25,000	**36,000**	11,000
OMAN	6,000	25,000	**31,000**	5,500	5,500	25,000	**30,500**	5,500
PAKISTAN	5,000	25,000	**30,000**	6,000	6,000	25,000	**31,000**	6,000
MEXICO	4,000	19,000	**23,000**	4,000	4,000	20,000	**24,000**	4,000
SUDAN	1,000	6,000	**7,000**	1,000	1,000	6,000	**7,000**	1,000
LIBYA	1,000	3,000	**4,000**	300	300	3,000	**3,300**	300
WORLD TOTAL	**265,100**	**1,205,000**	**1,470,100**	**247,300**	**247,300**	**1,320,000**	**1,567,300**	**306,100**
WORLD CONSUMPTION (Supply-End. Stock)				**1,222,800**				

Source: INC. These data concern only dates that have been packaged and presented for sale as such. They account for about 15% of global production of raw dates. Dates consumed in bulk and those destined for processing are not included. Marketing year starts at harvest. The first year listed marks the start of the MY (e.g., 2025/26 starts as of 2025 harvest).

Dried Apricots

杏脯 / مشمش مجفف / सूखे खुबानी / Orejón / Damascos secos / Abricot sec / Kuru kayisi

The information contained herein was prepared between late January and February 2026.

Türkiye. As reported by the Aegean Exporters' Association, the severe April 2025 frost and the resulting production decline have driven 2025/26 shipments down. As of January 31, 2026, volumes totaled 17,730 metric tons, compared to 46,618 MT over the same period in 2024/25.

Estimated World Dried Apricot Production. Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	7,000	107,517	**114,517**	45,000	45,000	2,000	**47,000**	1,000
UZBEKISTAN	0	12,000	**12,000**	2,000	2,000	25,000	**27,000**	500
IRAN	0	25,000	**25,000**	1,000	1,000	23,000	**24,000**	1,000
TAJIKISTAN	0	7,000	**7,000**	1,000	1,000	15,000	**16,000**	500
AFGHANISTAN	0	3,500	**3,500**	2,000	2,000	10,000	**12,000**	0
CHINA	0	4,900	**4,900**	0	0	3,000	**3,000**	0
USA	0	1,800	**1,800**	0	0	2,700	**2,700**	0
SOUTH AFRICA	0	1,200	**1,200**	0	0	1,100	**1,100**	0
OTHERS	0	5,000	**5,000**	0	0	5,300	**5,300**	0
WORLD TOTAL	**7,000**	**167,917**	**174,917**	**51,000**	**51,000**	**87,100**	**138,100**	**3,000**
WORLD CONSUMPTION (Supply-End. Stock)				**123,917**				

Sources: Aegean Exporters' Association, Iran Dried Fruit Exporters Association, Dried Fruit South Africa, and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

Dried Cranberries

小红莓 / التوت البري المجفف / सूखे क्रैनबेरी / Arándano rojo / Airelas secas / Canneberge séchée / Keçiyemisi

The information contained herein was prepared between late January and February 2026.

Strong demand and static processing capacity continue to constrain inventories. North America's 2025 fresh crop declined about 10%, with some production areas showing suboptimal fruit quality for drying due to soft texture and reduced size. Tariff-driven trade shifts are increasing Canadian frozen volumes bound for China for processing. Prices firmed slightly over last year, with no significant increases expected.

Estimated World Sweetened Dried Cranberry Production. Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
USA	9,367	142,321	**151,688**	8,880	8,880	143,900	**152,780**	8,922
CANADA	3,678	49,560	**53,238**	2,765	2,765	49,700	**52,465**	2,734
CHILE & OTHERS	360	10,670	**11,030**	378	378	16,600	**16,978**	1,022
WORLD TOTAL	**13,405**	**202,551**	**215,956**	**12,023**	**12,023**	**210,200**	**222,223**	**12,678**
WORLD CONSUMPTION (Supply-End. Stock)				**203,933**				

Source: INC. The cranberry crop is harvested in the fall. End-of-year statistics are measured as of August 31. 2025/26 represents the estimate of production and supply through August 31, 2026.

Dried Figs

无花果 / التين المجفف / सूखे अंजीर / Higo seco / Figos secos / Figue sec / Kuru incir

The information contained herein was prepared between late January and February 2026.

Türkiye. According to the Aegean Exporters' Association, the 2025/26 production estimate has been revised down by 13% due to adverse weather affecting yields. Year-to-date shipments through January 31, 2026, reached 29,336 metric tons, 8% down from the same period last season.

Estimated World Dried Fig Production. Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	8,000	60,000	**68,000**	5,000	5,000	70,000	**75,000**	10,000
IRAN	6,000	35,000	**41,000**	8,000	8,000	32,500	**40,500**	10,000
AFGHANISTAN	1,000	15,000	**16,000**	0	0	25,000	**25,000**	0
SPAIN	0	12,000	**12,000**	1,200	1,200	10,200	**11,400**	0
GREECE	50	2,600	**2,650**	300	300	5,500	**5,800**	0
ITALY	0	2,500	**2,500**	0	0	2,200	**2,200**	0
USA	1,500	5,000	**6,500**	500	500	4,500	**5,000**	250
OTHERS	0	5,700	**5,700**	0	0	6,500	**6,500**	0
WORLD TOTAL	**16,550**	**137,800**	**154,350**	**15,000**	**15,000**	**156,400**	**171,400**	**20,250**
WORLD CONSUMPTION (Supply-End. Stock)				**139,350**				

Sources: Aegean Exporters' Association, Iran Dried Fruit Exporters Association, Greek Nuts & Fruits Trade Association and other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY (e.g., 2025/26 starts as of 2025 harvest).

Prunes

西梅 / البرقوق المجفف / प्रून / Ciruela seca / Ameixas secas / Pruneau / Kuru erik

The information contained herein was prepared between late January and February 2026.

Chile. According to Chile Prunes, at the time of reporting, the 2026 harvest was expected to be abundant with good quality and one week earlier. Weather has generally been favorable, although heat waves have caused some early fruit drop.

USA. The California Prune Board raised the previous 2025/26 estimate slightly, supported by large, sweet fruit and excellent dry-away. Looking ahead to 2026, winter conditions have been favorable. At the time of reporting, markets remained relatively stable, with signs of firming prices.

Estimated World Prune Production. Metric Tons

Country	2024/2025				2025/2026			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
CHILE	14,000	73,390	**87,390**	4,920	4,920	74,000	**78,920**	10,000
USA	49,500	68,900	**118,400**	49,800	49,800	64,000	**113,800**	48,000
FRANCE	19,000	30,500	**49,500**	17,000	17,000	27,000	**44,000**	12,000
ARGENTINA	5,000	38,000	**43,000**	5,000	5,000	25,000	**30,000**	1,000
SERBIA	1,000	4,800	**5,800**	1,000	1,000	5,000	**6,000**	1,000
AUSTRALIA	0	820	**820**	0	0	3,000	**3,000**	350
ITALY	650	1,600	**2,250**	700	700	2,000	**2,700**	500
SOUTH AFRICA	0	541	**541**	328	328	250	**578**	0
WORLD TOTAL	**89,150**	**218,551**	**307,701**	**78,748**	**78,748**	**200,250**	**278,998**	**72,850**
WORLD CONSUMPTION (Supply-End. Stock)				**228,953**				

Sources: California Prune Board, Chile Prunes Association, Bureau National Interprofessionnel du Pruneau (France), Australian Prune Industry Association, Dried Fruit South Africa, and other INC sources. **Marketing year starts at harvest and covers the following 12 months during which the crop is marketed. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts in 2025).**

Raisins, Sultanas & Currants

葡萄干 / الزبيب / किशमिश / Uva pasa / Passas / Raisin sec / Kuru üzüm

The information contained herein was prepared between late January and February 2026.

China. Total 2025/26 production was, at the time of this report, estimated at 190,000 metric tons, lower than initially expected and 14% down from the previous report. The output consists of approximately 100,000 MT of green raisins and 90,000 MT of Sultanas, with ending stocks projected at around 10,000 MT.

Sultana exports slowed down towards the end of January and prices eased. In contrast, green raisins exports expanded significantly, supported by strong demand. Prices for green raisins have risen by 15-20%, and available stocks continued to tighten.

Türkiye. According to the Aegean Exporters' Association, 2025/26 year-to-date shipments totaled 60,918 MT as of January 31, 2026, a 21% reduction versus the same period last season. The contraction reflects the season's lower production output.

USA. Growing conditions during the spring and early summer created optimism regarding the 2025 crop. However, several rain events in September and October affected production, and it is estimated that 25,000 to 30,000 MT were lost as a result.

As of mid-January 2026, deliveries from growers were still trickling in while most of the 2025 production had been delivered to packers. August to December 2025 shipments were slightly up compared to the same time the previous year, most likely due to softness in pricing.

Iran. Year-to-date through January, exports reached approximately 55,000 MT of both golden and sun-dried varieties. Domestic consumption is estimated at around 50,000 MT for the full year. It is estimated that the remaining volume, available for the rest of the marketing year, accounts for around 57% of golden and 43% of sun-dried.

South Africa. As reported by Raisins South Africa, the third independent crop forecast, conducted on February 13, 2026, places expected 2026 production at 86,500 MT, down 14% from the initial forecast and 11% below the mid-January estimate.

The estimate was revised following consultations with stakeholders and producers regarding conditions observed during the harvest to date. Only certain areas in the Northern Cape have been affected by severe weather, but the overall outlook warranted another downward adjustment. The main drivers behind the reduction include downy mildew levels proving more severe than initially anticipated, continuous heatwaves throughout January, weak set and loose bunch formation in early cultivars leading to lower weights, and yields along the Lower Orange River falling below those of the 2024/25 season. Average yield expectations stand at 6.3 MT/ha. The updated regional production forecast places Northern Cape at 77%, Western Cape at 17%, Namibia at 2%, and other regions at 4%, including Northern and Western Cape's table grape berries and experimental cultivars.

Chile. Production for the 2026/27 season is projected at around 65,000 MT. Harvesting activities were set to begin in the northern regions towards the last week of January, before gradually moving south.

Australia. As reported by Dried Fruits Australia, looking ahead to 2026 production, conditions have been favorable, with relatively low disease pressure. There were some isolated hail events in December, which impacted some dried vine fruit properties. Early January saw some very hot and windy conditions, although only minor sunburn damage/loss was reported. Water storage was lower versus the same time last year and inflows were below average; temporary water prices increased as a result, having an impact on producers' input costs.

Crop loads were being reported as slightly down on last year's good crop, particularly Sultana types. However, with some new developments coming into production and re-developments coming back into production, overall yields were expected to be near last year's crop—potentially in the range of 18,000-19,000 MT. Maturity was reported around seven to ten days behind last year. Thus, a slow start to harvest was expected, towards early February.

Estimated World Raisin / Sultana / Currant Production. Metric Tons

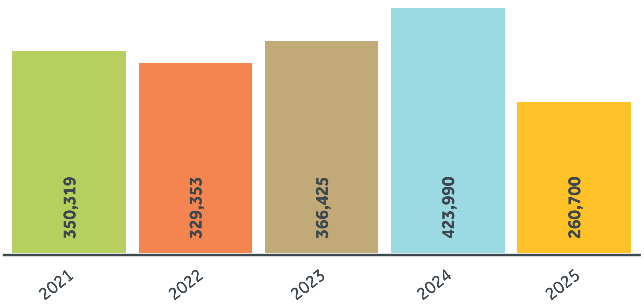
Country	2024/2025				2025/2026			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
CHINA	5,000	130,000	**135,000**	1,000	1,000	190,000	**191,000**	10,000
TÜRKIYE	10,000	226,239	**236,239**	40,000	40,000	165,000	**205,000**	20,000
INDIA	10,000	245,000	**255,000**	20,000	20,000	160,000	**180,000**	4,500
USA	44,000	174,000	**218,000**	54,000	54,000	157,000	**211,000**	54,000
IRAN	0	245,000	**245,000**	20,000	20,000	140,000	**160,000**	10,000
SOUTH AFRICA	6,000	96,400	**102,400**	13,000	13,000	101,000	**114,000**	19,750
CHILE	3,000	60,000	**63,000**	2,000	2,000	63,000	**65,000**	8,000
UZBEKISTAN	3,000	63,000	**66,000**	2,000	2,000	60,000	**62,000**	2,400
ARGENTINA	1,000	47,400	**48,400**	1,000	1,000	50,500	**51,500**	6,000
AFGHANISTAN	1,000	12,000	**13,000**	1,000	1,000	20,000	**21,000**	2,000
AUSTRALIA	450	11,875	**12,325**	200	200	18,560	**18,760**	200
GREECE	1,000	15,700	**16,700**	0	0	16,000	**16,000**	0
OTHERS	0	20,500	**20,500**	0	0	18,000	**18,000**	0
WORLD TOTAL	**84,450**	**1,347,114**	**1,431,564**	**154,200**	**154,200**	**1,159,060**	**1,313,260**	**136,850**
WORLD CONSUMPTION (Supply-End. Stock)				**1,277,364**				

Sources: Aegean Exporters Association, Iran Dried Fruits Exporters Association, Raisins South Africa, Dried Fruits Australia, 65th International Seedless Dried Grape Producing Countries Confrenceand other INC sources. Marketing year starts at harvest. The first year listed marks the start of the MY for both hemispheres (e.g., 2025/26 starts as of 2025 harvest).

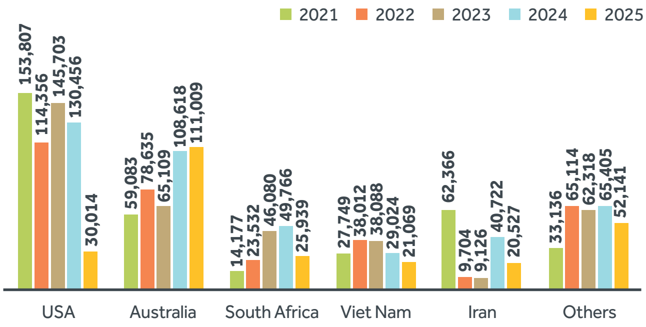
Special Report:
Nut Imports, China

Tree Nuts

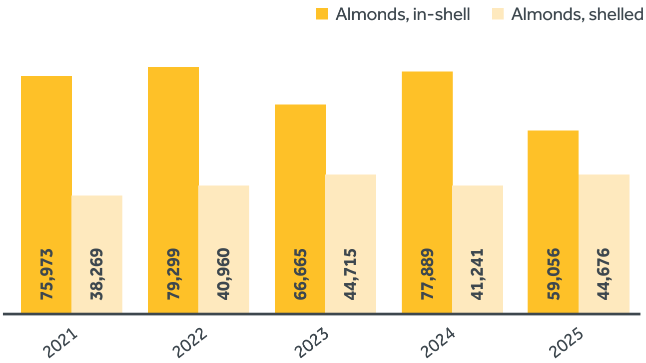
Tree Nut Imports Into China
(Metric Tons, January-December, in-shell + shelled)



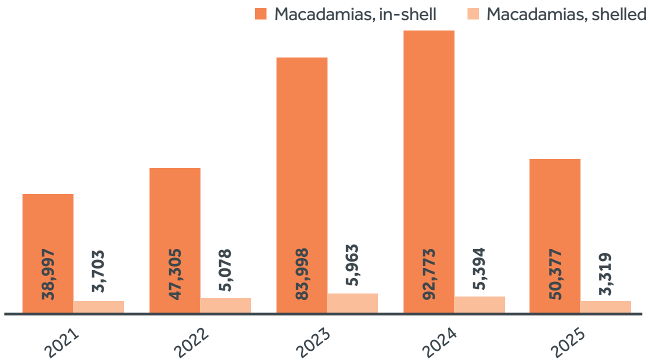
Tree Nut Imports Into China, Main Origins
(MT, Jan-Dec, in-shell + shelled)



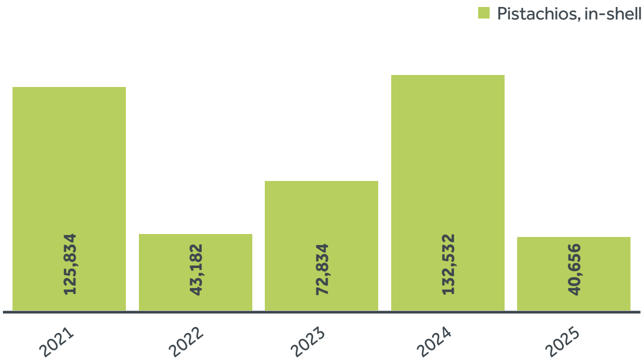
Almond Imports Into China
(MT, Jan-Dec)



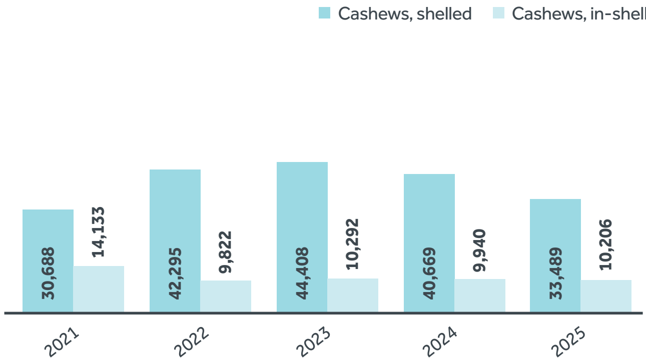
Macadamia Imports Into China
(MT, Jan-Dec)



Pistachio Imports Into China
(MT, Jan-Dec)

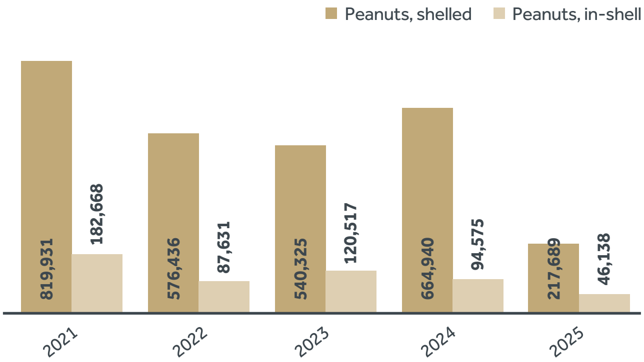


Cashew Imports Into China
(MT, Jan-Dec)

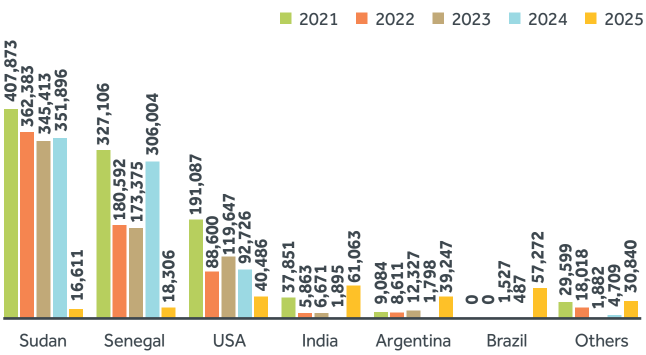


Peanuts

Peanut Imports Into China
(MT, Jan-Dec)



Peanut Imports Into China, Main Origins
(MT, Jan-Dec, in-shell + shelled)

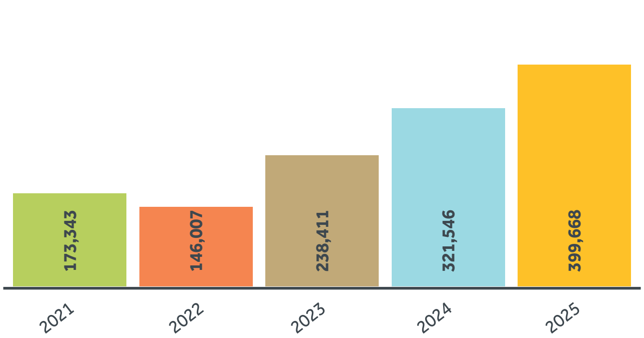


Source: Chinese Customs Database.

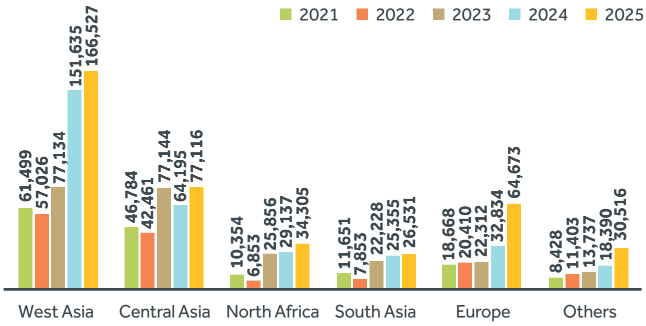
Special Report:
Nut Exports, China

Tree Nuts

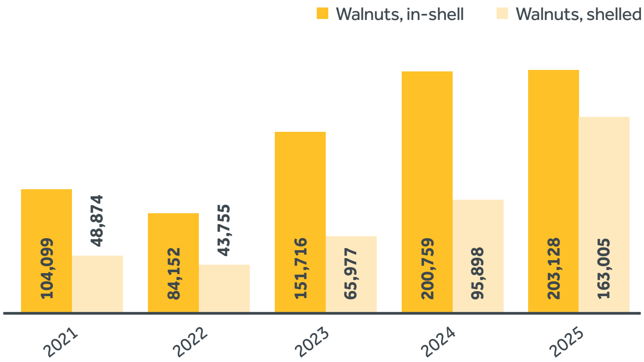
Tree Nut Exports From China
(Metric Tons, January-December, in-shell + shelled)



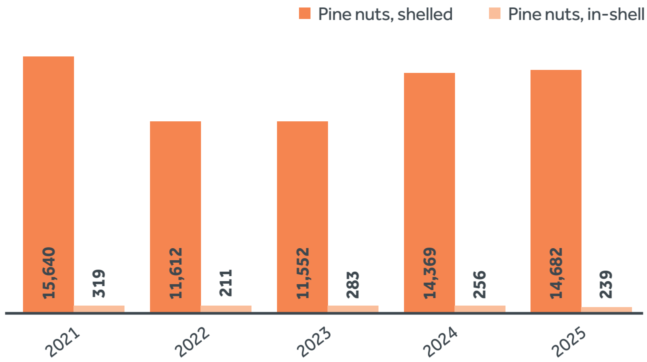
Tree Nut Exports From China, Main Destinations
(MT, Jan-Dec, in-shell + shelled)



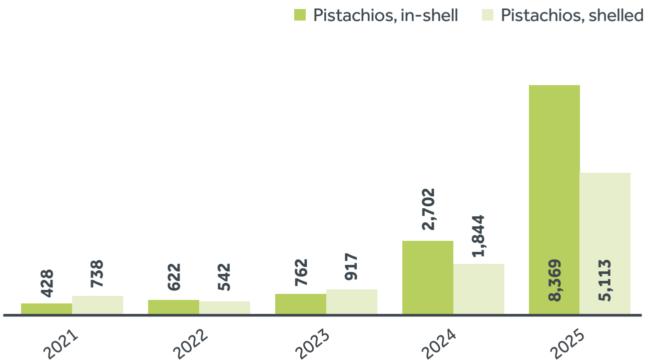
Walnut Exports From China
(MT, Jan-Dec)



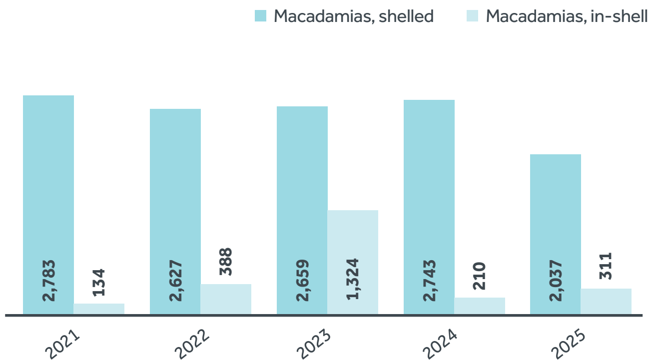
Pine Nut Exports From China
(MT, Jan-Dec)



Pistachio Exports From China
(MT, Jan-Dec)

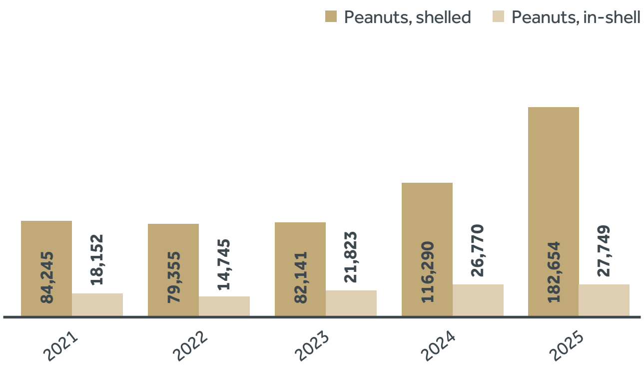


Macadamia Exports From China
(MT, Jan-Dec)

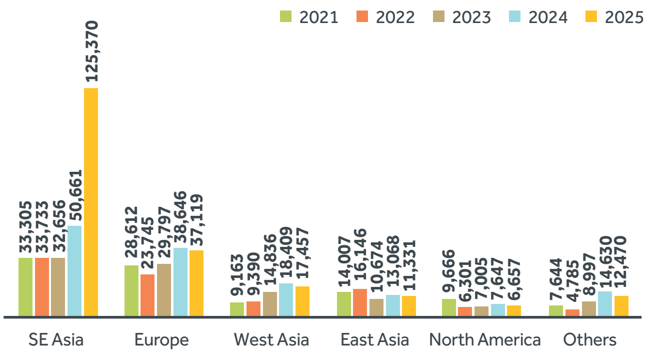


Peanuts

Peanut Exports From China
(MT, Jan-Dec)



Peanut Exports From China, Main Destinations
(MT, Jan-Dec, in-shell + shelled)

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Understanding Safe and Responsible Enjoyment of Pistachios

California Pistachios are widely recognized for their flavor and nutritional benefits as a complete protein snack on the go. There is a small segment of the population that has to be cautious with tree nut consumption due to allergies. California Pistachios is committed to supporting consumers in understanding food allergens related to pistachios with tips from registered dietitians and healthcare professionals.

The nine major food allergens in the US are often referred to as the "big nine," consisting of milk, eggs, peanuts, tree nuts, wheat, soy, fish, shellfish, and sesame. In a comprehensive literature review published in *Annals of Allergy, Asthma & Immunology*, the prevalence of tree nut allergies varies and ranges from just an estimated less than 1% to approximately 3% worldwide.[1] In the US only 0.4% of surveyed adults reported being allergic to pistachios, highlighting even further the relative rarity of this specific allergen, according to a population-based survey conducted by the University of Chicago.[2]

While pistachios fall within the broader category of tree nuts, it is important to note that an allergy to one type of tree nut does not always mean an allergy to every individual tree nut. According to the American Academy of Allergy, Asthma & Immunology,[3] some individuals with allergies to other tree nuts may still be able to consume pistachios. However, because some nuts are closely related to each other, individuals with known allergies should consult a qualified healthcare provider or allergist before introducing new tree nuts into their diet. These tips may help individuals with tree nut allergies make informed choices about enjoying tree nuts responsibly.

Individuals with tree nut allergies sometimes share concern about being in close proximity to pistachios in public and/or enclosed settings. However, research suggests that such environments pose minimal risk to those with food allergies. A 2024 study published in the *Archives of Disease in Childhood* found that airborne transmission of tree nut allergens, including pistachios, during air travel is unlikely.[4] As a result, most individuals with pistachio allergies can safely share spaces such as airplanes and restaurants as long as they avoid ingesting the allergen, since allergic reactions to pistachios are primarily triggered by direct consumption.

While food allergens are present in many everyday environments, they can generally be managed safely through awareness, responsible practices, and informed decision-making. Pistachios, like other tree nuts, can be enjoyed by the majority of consumers, and individuals with allergies can typically navigate spaces where pistachios are present without increased risk.

FAST FACTS

An estimated 1% to 3% of the global population are allergic to tree nuts,[1] but only an estimated 0.4% of US adults surveyed by the University of Chicago are allergic to pistachios specifically.[1,2]

An allergy to one type of tree nut does not always mean an allergy to all tree nuts. Some individuals with allergies to some tree nuts may still be able to safely include pistachios in their diets. Please consult your qualified healthcare provider for guidelines.

If you have tree nut allergies, you may reduce your exposure by wiping down your seating area when boarding a plane.[4]

References: 1. McWilliam, et al. (2020). Prevalence and natural history of tree nut allergy. *Ann Allergy Asthma Immunol*, 124(5), 466–472. **2.** Gupta, R. S., et al. (2019). Prevalence and severity of food allergies among US adults. *JAMA Netw Open*, 2(1), 1–14. **3.** *Everything You Need to Know about Tree Nut Allergy*. (2021). Aaaai.org. https://www.aaaai.org/tools-for-the-public/conditions-library/allergies/everything-you-need-to-know-about-tree-nut-allergy. **4.** Turner, P., & Dowdall, N. (2024). Flying with nut and other food allergies: unravelling fact from fiction. *Arch Dis Child*, archdischild-327848.

News From the INC Nutrition Research & Education Foundation

MAUREEN TERNUS, MS, RDN
Executive Director
INC NREF

The last of three papers from an INC NREF-funded study was recently published in the journal *Nutrients*.[1] The findings showed that replacing high-carbohydrate snacks with tree nuts reduced food cravings, especially for sweeter foods that are more likely to be nutrient-poor and energy-dense, and decreased consumption of fast food items. This substitution also improved diet quality and may reduce the potential adverse effects of frequent snacking on the metabolic health of young adults.

Photo: INC NREF.

Daily energy intake from snacking has increased over the last few decades while the prevalence of obesity and metabolic syndrome have risen to epidemic proportions. Food cravings may contribute to the types of snacks consumed, the frequency of foods and certain food groups consumed, and the overall nutritional quality of the diet.

Researchers at Vanderbilt University Medical Center studied 84 men and women, ages 22-36, most of whom were overweight or obese and had at least one metabolic syndrome risk factor at baseline (abdominal obesity, elevated triglycerides, low HDL cholesterol, high blood pressure, or elevated levels of blood glucose). Participants consumed 33.5 grams (about an ounce) of mixed unsalted tree nuts (almonds, cashews, hazelnuts, macadamias, pecans, pistachios and walnuts) or a matched serving of a carbohydrate-rich snack twice daily. Both snacks provided the same number of calories, protein, fiber, and sodium and were part of a 7-day weight maintenance menu that repeated throughout the study duration of 16 weeks.

According to principal investigator Heidi J. Silver, R.D., M.S., Ph.D., Research Professor of Medicine at Vanderbilt University Medical Center, "Compared to those who consumed the high-carbohydrate snacks, the tree nut consumers had significant decreases in cravings for high-sweet items and fast food items, which were associated with decreased frequency of desserts and salty foods, along with an increased intake of higher protein foods." After 16 weeks, the tree nut group reported significantly reduced cravings for pizza, cookies, brownies, donuts, candy, ice cream and chips. In addition to the reduced food cravings, tree nut consumers had a significant reduction in the frequency of consuming frozen desserts and salty snacks along with increased frequency in daily servings of high-protein foods.

Interestingly, the decreased cravings for sweets were associated with increased GLP-1 blood levels. GLP-1 is a hormone that the body produces to regulate blood glucose and appetite. The tree nut group reported a significant decrease in the total amount of food consumed daily, but there was no change in the amount of calories consumed and no change in body weight. The high-carbohydrate group, on the other hand, showed a trend toward increased hunger and reduced fullness ratings, as well as significantly increased energy intake, with average body weight increasing by 0.78 ± 1.95 kg at the end of the 16-week intervention period.

The researchers also looked at the Healthy Eating Index (HEI) score for both groups, since this score reflects overall diet quality. Low diet quality scores are associated with multiple cardiometabolic disease outcomes including metabolic syndrome, type 2 diabetes, cardiovascular disease and all-cause mortality. The HEI score for the tree nut snack group significantly increased, indicating overall improved diet quality, and reflected increased consumption of high-protein foods and unsaturated fatty acids. No HEI changes were seen in the carbohydrate snack group.

"As we've shown previously, simply replacing high-carbohydrate snacks with tree nuts is a relatively simple real-world strategy that can be incorporated in dietary guidelines and health promotion programs that aim to improve cardiometabolic health," stated Dr. Silver.[2,3]

Publicity efforts to date surrounding this new paper have resulted in 436 placements totaling more than 396,000,000 impressions globally.

For more information on this study and any other INC NREF project, please contact Maureen Ternus at maureen.ternus@nuthealth.org.

References:
1. Lillegard, K., et al. (2025). Consuming Tree Nuts Daily as Between-Meal Snacks Reduces Food Cravings and Improves Diet Quality in American Young Adults at High Metabolic Syndrome Risk. *Nutrients*, 17(23), 3778. **2.** Widmer, A., et al. (2025). Consumption of tree nuts as snacks stimulates changes in plasma fatty acid profiles and adipose tissue gene expression in young adults at risk for metabolic syndrome. *Clin Nutr*, 48, 25–34. **3.** Sumislawski, K., et al. (2023). Consumption of Tree Nuts as Snacks Reduces Metabolic Syndrome Risk in Young Adults: A Randomized Trial. *Nutrients*, 15(24), 5051.

Repositioning California Walnuts for Today's Consumers

Across global markets, California walnuts are being reintroduced to today's consumers through fresh positioning, modernized messaging, and stronger connections to evolving food and wellness trends. From younger US shoppers seeking feel-good foods, to European consumers looking for ingredients tied to cultural traditions, to Asian audiences discovering walnuts through popular media, the category is undergoing a meaningful transformation.

California walnuts are going through an evolution: transitioning from being thought of as a traditional ingredient or for "grandma's banana bread" to being a healthy, contemporary, flavorful, and essential part of everyday eating. Leveraging more than three decades of health-focused research while aligning with the holistic view of wellness embraced by younger consumers—the next generation of walnut lovers— marketing programs around the world emphasize the versatility, nutrient density, and natural flavor profile of California walnuts in formats that resonate with modern lifestyles, from snacking to plant-forward meals.

In the USA, repositioning is also happening at point of purchase. The industry is working to move California walnuts beyond the traditional baking aisle and into the fresh produce and snack sections, where shoppers increasingly discover products that support their wellness goals. These initiatives include year-round retail partnerships and category management insights, which result in expanded in-store displays, secondary placements, and cross-merchandising programs that champion walnut flavor, nutrition, and usage inspiration. The new 2026 USDA Food Pyramid—which now visibly recognizes walnuts—provides added momentum for retail partners to highlight walnuts as a smart, everyday food choice.

Photo: California Walnut Commission.

Food service and food manufacturing remain equally critical, and programs are underway to educate and inspire restaurant operators, culinary professionals and new product developers on how to incorporate walnuts into recipes and products. Flavor, texture, and aroma are central to this strategy and the new California Walnuts 360° Flavor Experience wheel—developed by the California Walnut Board & Commission's Chef-in-Residence, Robert Danhi— equips food professionals with a tool to explore the unique sensory attributes of California walnuts. This resource supports experimentation and innovation across formats such as walnut "meat," cream substitutes, spreads, toppings, and other plant-forward applications. In the consumer packaged goods space, we are also engaging food and ingredient manufacturers to showcase how walnuts elevate products across categories, from snacking to the expanding plant-based segment.

California walnuts are being redefined for today's global consumer, modern, relevant, and delivering exceptional taste and nutrition. So, move over banana bread—walnuts are ready to become the next food trend.

"Marketing programs are emphasizing the versatility, nutrient density, and natural flavor profile of California walnuts in formats that resonate with modern lifestyles."

New Application Solutions Guides Embed Macadamias More Deeply in Global Product Development

AUSTRALIAN MACADAMIAS

LAURA DAVIES
Market Development Manager
Australian Macadamias

A key focus of the Australian Macadamias marketing program over the past 12 months has been the creation of high-quality technical resources for food and beverage manufacturers to bridge the gap between food professionals' awareness of macadamias and the technical know-how required to use them effectively in commercial products.

The first stage of this work, developed through an extensive collaboration with the Food Innovation team at the Queensland Department of Primary Industries, was the launch of the Australian Macadamias Technical Guide. Designed to give food professionals clarity and confidence, it helps manufacturers work with macadamias more effectively. This was followed by the release of the Application Solutions Guides, which take this support a step further.

As part of a long-term investment in growing global demand for Australian macadamias, the Application Solutions Guides give manufacturers 13 fully tested, commercially viable product formulations using macadamias across five categories:

- **Bakery:** Macadamia and White Chocolate Cookies, Macadamia Brownies, Macadamia Crumble, Macadamia Mooncakes, Macadamia Nut Mini Tarts
- **Snacking:** Dry Coated Macadamias, Wet Coated Macadamias
- **Nut Pastes:** Macadamia Paste, Chocolate Macadamia Spread
- **Praline Fillings:** Macadamia Praline Chocolates, Macadamia Praline for Bakery
- **Dips:** Harissa Macadamia Hummus Dip, Macadamia Pesto

While macadamias are a premium ingredient that delivers on flavour, texture and nutrition, they can be unfamiliar territory for some manufacturers. The concepts were developed by food technologists who understand the realities of new product development. They are designed to remove uncertainty and reduce trial time by providing the detail manufacturers need to get the most out of macadamias, while serving as a springboard for creative product development.

Featuring easy-to-follow formulation tables and flowcharts, the guides include advice on which macadamia formats to use, how they perform during processing and the inclusion rates that deliver the best sensory outcomes. They are available in five languages: English, Korean, Simplified Chinese, Traditional Chinese and Japanese, ensuring food professionals in key markets can access them with ease.

This initiative is a key part of the industry's strategy to build sustainable markets for macadamias by supporting product innovation. By making it easier for companies to develop new macadamia products, we are laying the groundwork for seeing macadamias used in more products across more markets in the years ahead.

See the Application Solutions Guides in the Technical Resources section of the Australian Macadamias trade website: trade.australian-macadamias.org/technical-resources

> *"The Application Solutions Guides give manufacturers 13 fully tested, commercially viable product formulations using macadamias across five categories."*

Application Solutions Guide: Macadamia and White Chocolate Cookies. Image courtesy of the Australian Macadamia Society.

The Science Behind Pistachios and Menopause Health

AMBER WILSON, MS, RD
Senior Director, Global Nutrition & Marketing, North America
American Pistachio Growers

Photo: American Pistachio Growers.

Menopause is a pivotal time in a woman's health journey—and nutrition can play a powerful role in symptom management and long-term disease prevention. American-grown pistachios offer a unique combination of nutrients that support key clinical concerns for midlife women.

Studies show that women going through menopause need to eat more protein, including plant-based protein, to preserve muscle mass and strength as estrogen levels decline.[1,2]
Pistachios are one of the few plant-based foods that naturally provide complete protein—those that contain all nine essential amino acids we need to get from food—with 6 grams of protein per serving (28 grams or 1 ounce).
Read on for research on how pistachios can support the menopause transition:

- **Cardiometabolic Support:** With heart disease risk rising post-menopause, pistachios deliver a cardiometabolic advantage—supporting healthy blood pressure, glycemic control, and lipid profiles. Research shows they can even blunt post-meal blood sugar spikes when paired with carbohydrates.[3]
- **Weight Management Without Restriction:** Incorporating pistachios as a calorie-controlled snack has been shown to support weight loss goals without compromising satiety or nutrient intake.[4] Pistachios have a generous portion size — with only 160 calories for 49 nuts.
- **Essential Nutrients for Bone, Muscle, and More:** Pistachios provide essential nutrients for aging well—including potassium, magnesium, and complete plant protein. These nutrients support bone mineral density and muscle preservation, both of which are critical during and after menopause.
- **Nutritional Support for Midlife Eye Health:** Menopause can affect eye health due to hormonal changes, particularly declining estrogen levels, which can lead to dry eyes, blurry vision, and an increased risk of certain eye conditions. Pistachios can support eye health due to their high content of lutein and zeaxanthin, antioxidants that act as natural filters for blue light. Research suggests that regular consumption of pistachios can increase macular pigment optical density, which is a key indicator of eye health and protects against age-related macular degeneration.[5]
- **Isoflavones: A Natural Ally for Hot Flashes:** Pistachios contain isoflavones—compounds shown to help reduce the frequency and severity of hot flashes in some women during menopause.[6,7]
- **Antioxidants That Work Harder:** With more antioxidants than blueberries, pistachios deliver anti-inflammatory and neuroprotective compounds that may support brain health, mood regulation, and healthy aging.[8,9]
- **Brain Health:** Pistachios contain nutrients and bioactive compounds that play a role in supporting brain function and emotional well-being. These include unsaturated fats, fiber, plant-based protein, vitamin B_6, magnesium, and antioxidant phytochemicals such as lutein and polyphenols. Science shows that these nutrients may support healthy neurocognitive function, particularly as we age.[9]
- **Fiber During Menopause:** Pistachios provide both soluble and insoluble fiber—3 grams per serving—making them a flavorful, plant-based way to help meet the recommended daily value of 28 grams of fiber per day.[10]

Additional resources:
• Pistachios and blood sugar management research:
https://americanpistachios.org/research-archives/blood-sugar-research
• Pistachios and weight management research:
https://americanpistachios.org/research-archives/weight-research

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Chilean Walnuts: Looking Forward to a Stable Harvest With Characteristic Quality

With the 2026 harvest just around the corner, the Chilean walnut crop is progressing well under favorable conditions, with projections suggesting that the new crop will be quite similar to last year's. Chilenut continues to advance initiatives to support the industry and promote consumption.

The area planted with walnut trees in Chile has declined slightly over the last two years, stabilizing at just over 40,000 hectares. This reality, combined with better price prospects, suggests that Chilean walnut production in a normal year will be around 170,000-175,000 metric tons (in-shell basis).

As for the current marketing year, more than 169,635 MT of walnuts (in-shell equivalent) have been shipped as of December 31, pending shipments for January, February, and the first three weeks of March, before the figures for the 2025 season can be finalized.

The new crop, set to be harvested in April 2026, is projected to be very similar to last year's, with a slight downward trend, mainly due to lower output in central Chile, which accounts for 36% of production. In the southern region—from Maule southward—orchards continue to experience high disease pressure that has been ongoing since last year. However, production conditions for this season are better, leading to a projected increase in output for this region, which altogether accounts for around 30% of national production.

At Chilenut, we will continue to prepare for the next season. We are organizing another "field day" event, which will focus on the main technical aspects that enable a good-quality harvest, as well as the shelling and drying of walnuts. With support from the Chilean foreign ministry's export support office (ProChile), we will continue implementing two international marketing campaigns in Spain and India. Additionally, for the first time, Chilenut is launching an entirely self-funded campaign called *Como Nuez*, which is aimed at promoting domestic consumption. In addition to all these activities, Chilenut will be sponsoring the gala dinner at this year's INC Congress, to be held in May in the city of Macao.

We hope that the 2025/26 season will be a successful one for Chile's walnut industry—both in terms of production and global sales—while also highlighting the nutritional and health benefits of Chilean walnuts for consumers worldwide.

Photo: Chilenut.

> *"Projections suggest that the new Chilean walnut crop, set to be harvested in April 2026, will be very similar to last year's."*

Right Place, Right Time, Right Ingredient: Unlocking Global Market Demand for California Almonds

Innovation across the almond category continues to accelerate, with new products featuring almonds hitting the market at a rate of nearly 10,000 per year worldwide, a clear sign of strong momentum.[1] The Almond Board of California (ABC) is harnessing this growth by pursuing opportunities that merge market viability, operational feasibility, and consumer desirability, partnering with key stakeholders to elevate food innovation in unprecedented ways.

Speakers at the breakfast session of The Almond Conference 2025 highlighted the research and market tactics that are helping to grow demand for almonds.

Understanding the Future Consumer. Lu Ann Williams of Innova Market Insights started off the session and emphasized the importance of keeping pace with rapidly shifting consumer expectations. While taste remains king, consumers now want nutrition, functionality, clean labels, and lower sugar. Almonds naturally deliver on these priorities, offering protein, fiber, and broad appeal.

Snacking culture is reinforcing this evolution: 60% of Gen Z eat more than one snack a day, and 40% regularly replace meals with snacks.[2] Looking ahead, six major trends—protein, gut health, indulgence, beverages, plant-based foods, and mind balance—all present strong opportunities for almonds thanks to their nutritional profile and versatility.

Where Growth Is Happening. The United States leads global almond product launches, with premium segments such as chocolate-covered almonds and dairy-alternative protein drinks showing immense potential. India follows close behind, where almonds have transformed into a highly appreciated, value-added ingredient across multiple retail channels. Parts of Southeast Asia also represent tremendous opportunity, particularly through its dynamic beverage culture, from milk teas to malt drinks to creative applications in cafés and sports bars.

Growing Demand in College and University Channels. ABC is also exploring the college and university sector, which is a massive, fast-moving US$18 billion industry serving 15 million students daily. Students' emphasis on experience and connection ("phone eats first") makes them uniquely open to new foods that blend flavor and function. Because campus dining can pivot quickly, almonds can be incorporated into menus more easily than in many other segments. In 2025, ABC partnered with the advertising agency Schafer Condon Carter on seven popup events at large universities, where limited-time offers showed strong affinity and provided insights into what drives Gen Z's food choices.

India: Positioned for Accelerated Growth. India continues to be one of the most promising long-term markets, driven by economic growth, shifting consumer behavior, and evolving retail channels. Almonds align strongly with trends toward health, premiumization, sustainability and convenience. Dr. Amitoj Singh of Boston Consulting Group said they identified four major pathways to unlock potential from consumer campaigns to cocreation with leading foodservice partners, all rooted in consumer-led innovation.

Looking Ahead. As global consumers increasingly prioritize taste, nutrition, convenience, and health, almonds are well positioned to deliver. Through continued innovation, engagement with emerging consumer groups, and expanded efforts in India, ABC is building on an already strong foundation for sustained global demand.

> *"New products featuring almonds are hitting the market at a rate of nearly 10,000 per year worldwide."*

TOP MARKETS FOR INNOVATION WITH ALMONDS

1	UNITED STATES
2	INDIA
3	GERMANY
4	SPAIN
5	UNITED KINGDOM

Source: Innova Market Insights.

To learn more, you can watch the session video at Almonds.org/Conference.

References:
1. Innova New Product Report: Calendar Year 2024.
2. Innova Snacking Survey 2024/2025.


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