Nutfruit

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THE MAGAZINE OF THE INC FOR THE GLOBAL NUT AND DRIED FRUIT INDUSTRY

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43rd INC WORLD NUT AND DRIED FRUIT CONGRESS

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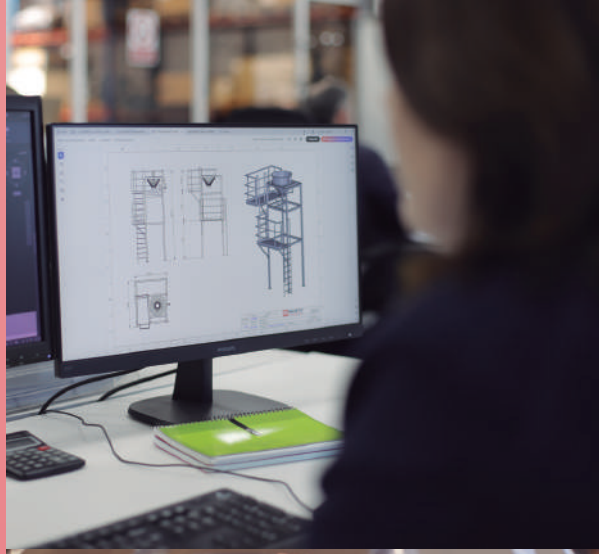
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THE MAGAZINE OF THE INC FOR THE GLOBAL NUT AND DRIED FRUIT INDUSTRY

Edition 98. N°2 **July 2026**

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Positioning Our Industry for the Future



ASHOK KRISHEN
INC CHAIRMAN

As we enter the second half of 2026, it is clear that our industry is operating in an increasingly complex environment. Geopolitical tensions, trade uncertainty, rising costs and climate-related challenges continue to test businesses across the global supply chain. Yet, as our industry has demonstrated time and again, these challenges also present opportunities.

The INC Congress in Macao once again provided an important opportunity for the global nut and dried fruit industry to come together and discuss the issues shaping our future. The round table sessions offered valuable insights into the challenges and emerging trends, while meetings of the Executive Committee, Board of Trustees and INC subcommittees provided a valuable forum to address key industry concerns, identify opportunities and discuss how we can continue advancing the three INC strategic goals for the industry across different regions of the world.

It was encouraging to see a strong alignment across these discussions and a shared commitment to ensuring that our industry continues to work towards a unified agenda for growth. It was also pleasing to celebrate an important milestone for the INC as our membership surpassed 1,000 companies worldwide, reflecting the growing relevance of our organization and the commitment of our members.

Looking ahead, there are several areas that I believe will have a significant influence on our sector. The first is the complex geopolitical environment in which our industry operates. Beyond the human impact, conflicts and uncertainty in different parts of the world continue to affect markets, trade flows and consumer confidence, creating challenges for businesses across the value chain. In an increasingly interconnected world, instability in one region can quickly affect markets elsewhere, reinforcing the need for our industry to remain adaptable and work together to ensure nuts and dried fruit remain accessible to consumers worldwide.

A second area of concern, as a consequence of this broader environment, is logistics. This includes the increasing costs involved in getting our products to consumers. Supply chains continue to face disruptions, while transportation and operational costs remain elevated in many parts of the world. Despite these pressures, our industry has demonstrated remarkable resilience. The commitment of growers, processors, traders and retailers to maintaining reliable supply is a testament to the strength of our global value chain.

Climate change remains another defining challenge. We believe that pursuing pioneering efforts in sustainable practices will be key to ensuring the long-term sustainability of our industry. Across producing regions, companies are investing in more efficient water management, regenerative agricultural practices, renewable energy solutions and innovative approaches to resource stewardship. Sustainability is now a strategic imperative that will shape the future competitiveness of our industry.

Finally, innovation will be essential to unlocking future growth. Whether through new product applications, advances in production and processing, or new ways of engaging consumers, innovation will help us increase consumption, improve efficiency, strengthen sustainability and create value throughout the supply chain.

As we move forward, the INC remains focused on its three key priorities: increasing consumption, obtaining a health claim and making ourselves pioneers of sustainability. Very simply, if we can increase demand for nuts and dried fruit, we create more value for every single participant in the value chain—from grower to processor and global trade specialist, all the way through to the consumer.

The challenges before us are considerable, but so are the opportunities. I remain confident that, through collaboration, innovation and a shared commitment to these priorities, our industry is well positioned to build on its success and continue creating value across the entire value chain.

Kind regards,



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A Global Roadmap for the Nut and Dried Fruit Industry



GORETTI GUASCH
INC EXECUTIVE DIRECTOR

As we move further into 2026, the momentum generated at the 43rd INC World Nut and Dried Fruit Congress in Macao continues to shape the work of the INC and our industry. Bringing together more than 1,300 participants from 65 countries, the Congress provided an opportunity to reflect on the challenges and opportunities ahead, while reinforcing our shared commitment to the long-term growth and success of the sector.

The Congress also marked the unveiling of the INC's new brand identity. More than a visual refresh, the new branding reflects the evolution of the organization. Inspired by the INC's three strategic priorities—increasing global consumption and market access, obtaining a recognized health claim and updating dietary guidelines, and advancing sustainable practices across the industry—the new identity serves as a representation of our mission and strategic direction.

During my opening presentation, I highlighted three key initiatives aligned with these priorities.

Multi-Country Dissemination Campaign

As part of our efforts to increase consumption and strengthen market opportunities, the INC has expanded its multi-country dissemination campaign into Southeast Asia with the launch of *Snack Off*. Designed to engage Gen Z consumers through entertaining, food-focused content, the campaign is supported by extensive consumer research conducted across Indonesia, the Philippines, Thailand and Viet Nam. The findings provide valuable insights into consumption habits, motivations and opportunities for growth in a region home to approximately 185 million Gen Z consumers. Learn more about the campaign and the key research findings on page 65.

PRENUT Clinical Trial

Health remains at the heart of our long-term strategy. Following the significant progress made through NUTPOOL, a global meta-analysis involving nearly one million participants, the INC has approved funding for PRENUT, a groundbreaking multi-center randomized trial for diabetes prevention in high-risk individuals. This important milestone represents a major step forward in strengthening the scientific evidence needed to support a future health claim on nuts and update dietary guidelines. Discover the latest research developments and what PRENUT means for our industry on page 38.

INC Sustainability Certification

We have also reached a significant milestone in sustainability. After extensive development, the INC Sustainability Certification is now fully operational, and audits are officially underway. Supported by recognized auditing partners, including Bureau Veritas and DFA of California, the program provides our industry with a practical and credible framework to demonstrate sustainability performance and leadership. To support companies interested in participating, the INC is hosting a series of regional webinars to explain the audit process and demonstrate how the INC Certification can help strengthen their position in an increasingly sustainability-focused marketplace. Find out more on page 63.

These initiatives demonstrate how the INC continues to invest in and shape the future of our industry, expanding demand, strengthening the scientific evidence supporting consumption, and providing companies with practical tools to meet evolving sustainability expectations.

None of this progress would be possible without the commitment of our members. Together, we are building an industry that is not only growing, but one that is better positioned to meet the opportunities and challenges of the years ahead.

Thank you for your continued support of the INC and I hope you enjoy this edition of *Nutfruit*.

Ferrero Group Acquires Brazilian Company Bold Snacks



Photo: Ferrero Group.

Ferrero Group announced in March that it had signed an agreement to acquire Bold Snacks, a leading Brazilian premium protein snack company. Founded in 2018, Bold Snacks has seen strong growth from the outset, driven by its digital strategy and innovative portfolio of protein bars. As part of the transaction, Ferrero will take over Bold Snacks' office and factory in Divinópolis, Minas Gerais, with approximately 300 employees expected to join Ferrero Brazil. The acquisition adds Bold Snacks to Ferrero Group's growing stable of better-for-you brands such as Eat Natural and FULFIL in Europe and Power Crunch in North America. In Brazil, Ferrero and its affiliated company Dori Alimentos, owned by Ferrara, currently employ 4,500 people across five plants and three offices.

Barry Callebaut Identifies Top Chocolate Confectionery Trends

A new report published by Barry Callebaut identifies the key consumer trends shifts shaping the future of chocolate confectionery. The report, *Top Chocolate Confectionery Trends 2026 & Beyond*, aims to empower industrial manufacturers to innovate with confidence and create chocolate experiences that deliver value. Based on a multi-source intelligence model, the report identifies five key chocolate confectionery trends. First, the report finds that people increasingly mark "minorstones" with indulgent treats. Second, younger consumers are seeking new and adventurous products, influenced by new cultural powerhouse countries such as South Korea. Gen Z and millennials seek Asian ingredients such as matcha, calamansi and yuzu. Third, global taste palates are shifting toward less sweetness, more nuance and a shorter list of ingredients. Leading brands and innovators are using fresher, fewer and more transparent ingredients. Fourth, portion size is becoming a strategic lever for brands. Consumers are increasingly seeking mini and bite-sized confectionery formats that are flavor-rich and nutrient-dense, with added ingredients that support energy and gut health. Finally, multisensory chocolate is surging in popularity as consumers look for novel experiences in food that elicit excitement and defy expectations. What began as "Instagrammable" treats is now a full sensorial movement.

First-Ever Trail Mix for Toddlers Supports Early Peanut Introduction

Mission MightyMe has launched Nutty Trail Mix, a first-of-its-kind snack designed specifically for toddlers, creating an entirely new category in the children's food aisle. The product builds on the company's science-led approach to allergy prevention, rooted in research showing that early and consistent peanut consumption can significantly reduce the risk of developing allergies. The company was co-founded by pediatric allergist Gideon Lack, whose landmark LEAP study transformed global understanding of food allergy prevention and led to updated guidelines encouraging early allergen introduction. Unlike traditional trail mix, which poses choking risks for small children, the new product features soft, bite-sized components, helping parents safely maintain nut exposure as kids grow while supporting diet diversity. Nutty Trail Mix follows Mission MightyMe's 2020 debut of Nutty Puffs, the first pediatrician-developed, quick-dissolve snack made with peanuts and multiple tree nuts for babies.

US$75 Million in Funding Secured for Nigeria Cashew Processing Plant

A US$75 million financing package has been arranged to support a new cashew processing plant in Ogun State, Nigeria, developed by Robust International Pte Ltd. The funding is structured as a bond issued via a platform arranged by Symbiotics and fully subscribed by M&G Investments. The investment is backed by a 100% guarantee from GuarantCo, part of the Private Infrastructure Development Group, an organization funded by six governments: the United Kingdom, the Netherlands, Switzerland, Australia, Sweden and Canada. The plant is expected to more than double Robust's processing capacity, from 100 metric tons to 220 MT per day, and support local sourcing from thousands of farmers. Furthermore, the new plant will incorporate functionality to convert waste by-products into value-added biomass and biofuel inputs.



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, Jack 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. Mr. Lin was the winner of the INC 2026 Excellence in Gastronomy Award.

What inspired you to pursue a life in the culinary arts, and how did your journey begin?

It all started when I was 14. One night, I went to a party with my older brother. There was a chef cooking live. People around him, the lights were on him, and the smell filled the whole room. At that moment, I thought, "Wow, that guy looks like an artist, not just a cook"—using food to create warmth and togetherness. I told myself: I want to be that person!

But when I grew up and started working in a kitchen, reality wasn't that romantic. I began as a kitchen helper—carrying spices, washing vegetables. There was no air conditioning back then. The kitchen was 50°C in summer. Many quit. I didn't. While others rested, I memorized every spice—its character, brand, how to use it. I stayed in the kitchen practicing knife skills and reciting recipes, often until late at night.

Thirty years later, what's kept me going? A deep respect for ingredients, an obsession with perfect flavor, and a drive to show the world the very best of Chinese cuisine.

You have cooked for many high-profile events. How do you approach creating dishes that balance tradition with innovation for such prestigious occasions?

For me, cooking for state banquets has one goal: to help the world understand and fall in love with Chinese flavors.

Tradition is non-negotiable. State banquet dishes must carry the foundation of Chinese food culture: respecting the seasons, mastering the art of heat control, prioritizing the natural flavor of ingredients and following our ancient philosophy of balanced pairing. For example, Sichuan cuisine's *mala* spice isn't just random heat—it's "one dish, one style, a hundred dishes, a hundred flavors." Cantonese cuisine's freshness isn't blandness—it's "clear but not thin, fresh but not tacky." That cultural identity is our most precious asset on the global stage.

Innovation needs to fit well—not reinventing the wheel. Guests at high-

level banquets come from all over the world. Their tastes, aesthetics and eating habits vary greatly. We're not trying to break tradition. For big events, I'll take a classic dish, simplify it without losing its core, lighten heavy flavors and refine the presentation, so every guest can taste the depth of Chinese food while also feeling something familiar—and pleasantly surprising.

At the end of the day, the perfect balance comes from three things: respect for the ingredients, respect for the culture, and respect for the people you're serving. It's a calling card for Chinese food culture. We don't want to overpower anyone with flavor. We just want to say welcome—honestly, bite by bite.

How do seasonal changes influence your choice of ingredients and menu design?

There's an old saying in China: *Eat what's in season, when it's in season*. The wisdom of Chinese food culture has been written in the four seasons and the solar terms for thousands of years. When an ingredient is in season, it has the best flavor, the best nutrition, the fairest price—and most importantly, it respects nature.

For me, seasons affect my cooking in three ways:

First, I never blindly chase imported or expensive ingredients. The best ingredient is always the one that's local, fresh and right now.

Second, menu design: I tell a story with the solar terms. Every solar term has its own mood: *lichun* (start of spring) is about renewal, *xiazhi* (summer solstice) is about lightness, *qiufen* (autumn equinox) is about harvest, *dongzhi* (winter solstice) is about warmth. A menu isn't just a random list of dishes—it's an edible calendar. For example, for the spring equinox, I'll make Longjing shrimp balls, using fresh spring tea to complement the sweet, tender shrimp. For the autumn equinox, chrysanthemum chicken shreds to mirror the crispness of fall.

Third, seasoning has to follow the seasons. In spring, less salt and lighter spice. In summer, sour and spicy—fresh and bright. In autumn, rich fermented sauces. In winter, deep, hearty and warming.

How do you incorporate nuts and dried fruits into your dishes to enhance flavor and texture?

Nuts and dried fruits have a very friendly aroma. They have a good temper: they don't fight with other ingredients.

I usually use them in three ways. First, as a simple pre-meal snack. My favorite is salted and spiced nuts—like cashews or almonds. A quick stir-fry, a little sprinkle. As soon as guests sit down, their mouths aren't empty anymore, and the whole vibe just lifts. Second, crush the nuts and mix them with other ingredients. Like a shrimp dumpling—I put crushed pine nuts and walnuts at the bottom. You get that bouncy, silky shrimp texture, and then—*crack!*—the nuts burst in your mouth. That contrast is just so satisfying. Third, make a sauce with nuts. Nuts have natural oils. Whether it's a salad, something fried, or even roasted meat, nut-based sauces add a layer of rich, complex flavor.

As for dried fruits, I like to use them to "hide" flavor. For example, blending dried longan or lychee into a paste to marinate meat or make a sauce. That natural sweetness doesn't overpower anything—it just quietly adds a warm, gentle layer to the dish.

How do you see the role of nuts and dried fruits evolving in contemporary Chinese fine dining?

Not long ago, nuts and dried fruits were the sidekicks—the forgotten extras on a banquet table. But now? The spotlight has shifted. Chinese fine dining guests don't just want luxury—they want a story, health, texture and authenticity.

In modern high-end Chinese food, they're everywhere—from starters to desserts, from soups to tea. They're not just a garnish anymore. As ingredients that the whole world knows and loves, they've become real stars that add flavor. They've helped Chinese fine dining go from "yummy" to premium, international, healthy and soulful.

What's next for Chef Jack Lin?

My current focus is wok-side theater—a new fine-dining experience that brings the soul of Chinese cuisine to the table. The wok energy, knife skills, techniques, flavor profiles, local ingredients and culture—I want the world to see them. We're already developing this in China, and we plan to bring pop-ups or permanent experiences to high-end Chinese restaurants, luxury hotels, cruise ships and art spaces overseas.

My studio in China is a villa with more than ten private dining rooms—all with open kitchens for both cooking and filming. I welcome friends from around the world to connect and collaborate. That space leads to my next vision: a global chef's salon. A platform without borders—for culinary shows, skill exchanges, live streams, or even international tours and talks. Chefs from different cultures, speaking through food.

I also want to take China's best local ingredients and products to the world under my brand, Weijue. Overseas markets are a new direction for me—one I need to work harder on. And I will.

One last thought: magic meets cooking! This has huge potential to go viral—great topic, perfect for international TV. After all, isn't cooking already a kind of magic trick?

QUICK-FIRE ROUND!

What do you enjoy the most about being a chef?

The customers' happy smiles.

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

Grilled beef ribs with macadamia nuts.

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

Crispy sugar coated cashews (a childhood memory) and dried longan (for chicken soup or tea).

Foie Gras Terrine with Nuts and Sous Vide Beef Ribs

Ingredients:

- 200 g foie gras
- 1 kg USDA Prime grade beef ribs
- 200 g red cabbage
- 8 vine tomatoes
- 15 g ginger
- 15 g scallions
- 10 g hoisin sauce
- 10 g char siu sauce
- 15 g fermented soybean paste
- 130 g rock sugar (30 g for beef stew, 100 g for tomato marinade)
- 2 g star anise
- 2 g cinnamon stick
- 2 g bay leaf
- 5 g white pepper
- 25 g roasted almonds
- 25 g roasted pumpkin seeds
- 200 g milk
- 3 g thyme
- 5 g crushed black pepper (3 g for soaking, 2 g for terrine)
- 15 g nut liqueur
- 9 g salt (5 g for pickling, 2 g for stir-frying, 2 g for terrine)
- 65 p white sugar (40 g for pickling, 25 g for stir-frying)
- 30 g white vinegar (20 g for pickling, 10 g for stir-frying)
- 3 g chicken powder
- 20 g squid ink
- 20 g preserved plum
- 100 g sake
- 50 g apple cider vinegar
- Macadamia nuts to taste (for garnish)

Preparation:

1. Trim the beef ribs to remove excess fat and fascia. Place the ribs in water and blanch for 30 minutes. Skim off all blood foam thoroughly, then drain well. Pan-fry the ribs in a little oil until golden brown on all sides and set aside. Heat a small amount of oil, fry the ginger and scallions until golden and crispy, then remove and drain for later use.

2. Caramelize rock sugar in a new pan until reddish-brown with caramel aroma. Pour in the original beef blanching stock, then add the beef ribs, fermented soybean paste, char siu sauce and hoisin sauce, together with fried ginger, scallions and all spices. Simmer on low heat for 30 minutes, then transfer to a sous vide circulator and cook at a constant temperature of 65°C for 10 hours.

3. Thaw the foie gras naturally. Soak it in milk with thyme and crushed black pepper, seal and refrigerate overnight. Take out the next day, steam in a steam oven for 15 minutes, then roast in the oven for 8 minutes.

4. Mix almonds and pumpkin seeds, roast in the oven at 180°C for 15 minutes, take out and cool completely.

5. Heat the nut liqueur in a pan over low heat. Put the steamed and roasted foie gras and cooled roasted nuts into a high-speed blender, add salt, crushed black pepper and de-alcoholized nut liqueur, and blend at high speed until extremely smooth. Strain the mixture through a fine sieve, pour into molds, and freeze in a blast freezer until fully solidified.

6. Shred red cabbage, mix well with salt, white sugar and white vinegar, and marinate for 30 minutes. Rinse the marinated cabbage, soak in clean water, then drain thoroughly. Sauté the shredded cabbage in oil for 3 minutes, simmer with water over low heat until tender. Season with salt, white sugar, white vinegar and chicken powder. Mix well and set aside.

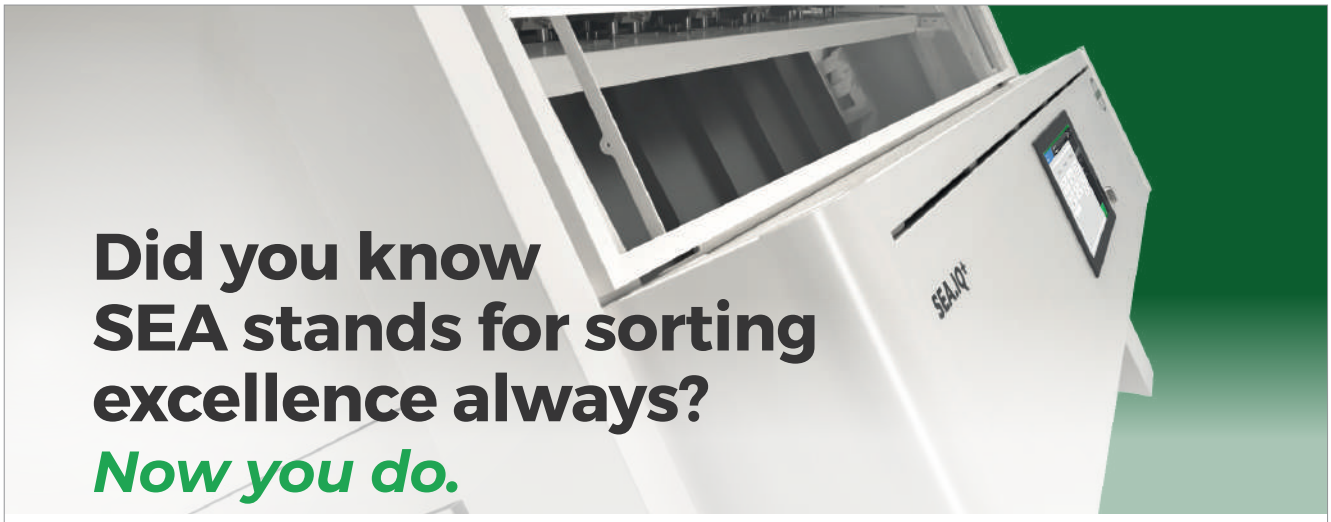
7. Reduce the sous vide beef rib stock over high heat to thicken. Add squid ink and stir well to make pure black sauce. Cut the shaped beef ribs into portions, brush evenly with the squid ink sauce, then bake in the oven at 220°C for 3 minutes.

8. Make tomato marinade: mix rock sugar, preserved plum, sake and apple cider vinegar until the rock sugar dissolves completely. Peel the vine tomatoes, soak them in the marinade, seal and refrigerate overnight.

9. Plate the braised tender red cabbage at the bottom, arrange the glazed black sauce beef ribs on top, and match with marinated vine tomatoes. Before serving, shave the nut foie gras terrine over the dish, and finish with crushed macadamia nuts as a garnish.



Photo: Jack Lin.



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Trade

EU Tariff Framework Finalized: 0% on US Dried Fruits and Quota for US Tree Nuts

Two regulations implementing tariff-related commitments under the August 2025 EU-US Joint Statement entered into force on July 1, 2026. Under Regulation (EU) 2026/1455, a 0% customs duty is set for products including the following: dried sultanas (0806 20 30), dried grapes excluding currants and sultanas (0806 20 90), dried apricots (0813 10 00), dried prunes (0813 20 00), dried fruit – other (0813 40 95), and cranberries (2008 93). The 500,000 metric ton tariff-rate quota includes CN code 0802, which includes almonds, hazelnuts, walnuts, pistachios, macadamia nuts, pine nuts and pecans, whether shelled or in-shell, and CN code 200819, "Nuts and other seeds, including mixtures, prepared or preserved (excluding peanuts)"—a category that includes roasted almonds and pistachios. The main regulation will cease to apply at the end of 2029. By June 30, 2029, the Commission will present a comprehensive assessment of the impact on EU-US trade flows, tariff revenue and economic effects, plus a legislative proposal to extend the application of the regulations where appropriate.

Fertilizer Update

In June, the US temporarily suspended countervailing and anti-dumping duties on phosphate fertilizer imports from Morocco, following a presidential proclamation that declared a national emergency over domestic phosphate supply. The measure allows Moroccan phosphate to enter the US market duty-free for up to eight months or until the emergency is terminated, and is intended to safeguard the domestic food supply amid recent disruptions to global fertilizer supply chains linked to conflicts in producing regions and trade actions by major fertilizer-exporting countries.

The EU has approved suspension of customs duties on nitrogen-based fertilizers, including urea and ammonia, until May 31, 2027. The suspension excludes imports from Russia and Belarus and is capped at a quota equivalent to 2024 MFN import volumes plus 20% of volumes previously sourced from those two countries.

In July, the European Parliament approved a package of temporary measures to help farmers cope with higher fertilizer prices, including liquidity support worth up to 80% of the additional fertilizer costs incurred. The measures must now be approved by the Council.

India Pushes for Preferential Tariff Access in Trade Talks With US

India is seeking preferential tariff treatment as negotiations on an interim trade agreement with the United States enter an advanced stage. According to officials cited by *Business Today*, New Delhi aims to secure more favorable tariff conditions for its exporters than those available to competing manufacturing economies, with both sides continuing discussions on the first phase of a potential agreement. The issue was discussed during meetings between India's Commerce and Industry Minister Piyush Goyal and US Trade Representative Jamieson Greer in late June.

China's New Framework for Registering Overseas Food Manufacturers

China's General Administration of Customs (GACC) issued Decree No. 280, formally replacing the previous Decree No. 248 as the governing framework for the registration of overseas manufacturers of imported food, in October 2025. The new rules became effective on June 1, 2026. In parallel, GACC issued Announcement No. 27 of 2026, which provides the key implementation guidance for the transition from Decree 248 and clarifies which food categories remain subject to "official recommendation" by the exporting country's competent authority. Both "nuts and seeds" and "dried fruits" remain among the product categories that require official recommendation under the new guidance. For the industry, the immediate priority is to verify facility status under the new regime and confirm whether each exporting facility falls under official recommendation, direct enterprise registration or any country-specific list-based mechanism. Companies should also review renewal calendars, especially where product is shipped on long lead times or where one facility supplies multiple SKUs or origins into China.

US Tariff Refund System

The US government has begun rolling out the system for issuing refunds for the payment of tariffs imposed under the International Emergency Economic Powers Act (IEEPA), which were declared unlawful by the US Supreme Court in February. US Customs and Border Protection (CBP) launched the first phase of the Consolidated Administration and Processing of Entries (CAPE) tool in April.

Sustainability

EU: Forced Labor Regulation Enforcement System Enters Into Force

Commission Implementing Regulation (EU) 2026/903, effective May 17, 2026, establishes the system supporting the EU Forced Labor Regulation (Regulation (EU) 2024/3015) by creating a dedicated forced labor module within the Information and Communication System for Market Surveillance (ICSMS). Full application of the prohibition follows on December 14, 2027. The regulation applies to all products on the EU market. In June 2026, the Commission published guidelines on the application of the regulation.

EU Greenwashing Directive to Apply From September 27, 2026

The new Directive on Empowering Consumers for the Green Transition (Directive (EU) 2024/825) will apply from September 27, 2026. This law aims to protect consumers from unfair commercial practices and to guarantee that claims about the social and environmental characteristics of products and businesses are truthful, clear and verifiable. The directive will apply to all companies that sell products to

consumers in the EU, even those established outside of the EU. Infringements could lead to maximum fines of at least 4% of the company's annual turnover. Claims on products or at company level related to future environmental performance, including in the form of a transition to carbon or climate neutrality, are prohibited on a case-by-case assessment without clear, objective, publicly available and verifiable commitments set out in a detailed and realistic implementation plan.

Update on Timing of EU's Increased Nickel ML in Pecans

The European Commission intends to raise the maximum level (ML) for nickel in pecans from 3.5 mg/kg to 10 mg/kg. According to FRUCOM, the possibility of having the higher ML enforced by a statement to be agreed by Member States was considered for the Standing Committee meeting of June 19, 2026, but ultimately postponed. The next Standing Committee meeting is scheduled for September 25, and the vote may take place then.

Food Safety

EU Introduces 20% Aflatoxin Checks on Peanuts From Argentina

On June 9, 2026, the European Commission published an implementing regulation amending the Increased Controls Regulation, which sets out temporary increases of official controls and emergency measures governing the entry into the EU of certain goods from certain third countries. Among other changes, the regulation has added peanuts from Argentina to Annex I of the regulation, with a 20% frequency of aflatoxin checks.

Labeling

California Date Labeling Law Takes Effect

As of July 1, 2026, all packaged food products sold in California are required to use standardized quality date and safety date labels. The new law mandates a two-category date labeling system and bans consumer-facing "sell by" dates on packaged food. Food manufacturers, processors or retailers responsible for labeling food items for human consumption that choose, or are otherwise required by law, to display a date label must use one of the following uniform terms: "BEST if Used by" or "BEST if Used or Frozen by" to indicate the quality date of a food item. A "Use By" or "Use or Freeze By" term is required for safety-critical dates.



Developing Future-Ready Leaders in the Cranberry Industry

OS Academy is Ocean Spray's grower-owner focused education and leadership development program, designed to strengthen the long-term success of the Ocean Spray cooperative, cranberry industry, and the agricultural communities it supports. This project was the winner of the 2026 INC Sustainability Award – Back to the People.



The inaugural OS Academy graduating class recognized at the 2022 Ocean Spray Annual Growers Meeting.

Cultivating Leadership From the Ground Up

Launched in November 2020, OS Academy is Ocean Spray's grower-focused education and leadership development program. As an agricultural cooperative, Ocean Spray is owned by the cranberry growers. This means 100% of the profits from their grower-owners' fruit go back to the grower-owners who have shaped this cooperative for close to 100 years. This program represents a strategic investment in the people who are the backbone of the Ocean Spray cooperative and cranberry industry, providing a structured yet adaptable learning experience that builds business acumen, deepens understanding of cooperative operations, and fosters future-oriented leadership capabilities. The program is built on the belief that by investing in grower-owner education, an organization can reinforce its commitment to shared ownership, informed decision-making and collaborative leadership.

A Comprehensive Curriculum for Modern Agriculture

At its core, OS Academy equips participants with practical, relevant knowledge across the key business functions that underpin a successful cooperative. The coursework is remarkably broad, spanning cooperative fundamentals, financial literacy, governance, strategy, and sustainability. Participants also delve into research and development, ingredients, manufacturing and government affairs.

This exposure allows growers to gain a clearer view of how the cooperative operates, how strategic decisions are made, and how various teams work on behalf of grower-owners. Just as importantly, the program builds confidence and capability among grower-owners who may aspire to take on broader leadership roles within the cooperative or their local grower communities.

The program has delivered more than 25 classes taught by over 40 Ocean Spray instructors representing a wide range of functions and expertise. These instructors provide growers with direct access to the teams shaping industry strategy and day-to-day operations, creating transparency and strengthening trust.

Designed for the Realities of Farming

The structure of OS Academy is intentionally flexible to meet the diverse needs of Ocean Spray's grower-owner members. The program follows a "choose-your-own-path" approach, allowing participants to either enroll in individual classes based on specific interests or complete a full curriculum to graduate from the program. In order to graduate, participants must



OS Academy graduates connect during an alumni networking event at the 2025 Annual Growers Meeting.

complete five required core courses and eight elective classes. This flexible approach allows the OS Academy to serve new and seasoned grower-owners alike, as well as multi-generation family operations with varying schedules and experience levels.

The academic calendar is specifically tailored to the farming cycle. Classes are offered annually from November through May, pause during the harvest season, and culminate in a graduation ceremony held at Ocean Spray's Annual Grower Meeting. Furthermore, the program is highly accessible; all classes are offered virtually and recorded, enabling participation across multiple countries—including the United States, Canada and Chile—and various time zones. This delivery model, combined with the flexible curriculum structure, makes the program adaptable to a broad range of grower circumstances.

Beyond the Classroom: Mentorship and Connection

Beyond formal instruction, OS Academy places a strong emphasis on connection, community and shared learning. Networking events are organized for current participants and alumni. Graduate-level courses extend learning opportunities beyond initial completion, reinforcing the OS Academy as an ongoing development pathway rather than a one-time experience.

A formal mentorship program pairs growers across different regions to promote relationship building, knowledge sharing and peer support. For newer growers, this mentorship builds confidence and a sense of belonging, while experienced operators find a meaningful way to share expertise and give back. Additionally, monthly "coffee chats" with senior leaders provide informal opportunities for participants to learn about leadership paths, organizational priorities and strategic decision-making. These sessions encourage open dialogue, curiosity, and mutual understanding between growers and leadership.

A Growing Legacy of Impact

The success of the initiative is reflected in its steady growth. To date, OS Academy has celebrated 107 graduates and has enrolled six cohorts, including 37 new participants in the most recent year—an indicator of the program's continued relevance and value. The diversity of the participants—spanning different farm sizes, regions and experience levels—enriches the learning experience, as growers bring varied operational realities into classroom discussions.

The impact of OS Academy is evident in its growing alumni network, increased cross-functional awareness among growers, expanding internal instructor engagement, and a heightened sense of connectivity across the cooperative. Graduates leave with deeper business knowledge, broader perspectives and stronger relationships that extend well beyond the program itself. They also gain broader understanding of the cooperative rather than just their individual operations within it.

Guided by continuous grower-owner feedback, the program continues to evolve and is now recognized as a central element of Ocean Spray's commitment to developing informed, connected and future-ready leaders who are better connected to their cooperative, and prepared to navigate the complexities of the global industry.

> *"OS Academy builds confidence and capability among Ocean Spray's grower-owners who may aspire to take on broader leadership roles."*

Scaling Regenerative Agriculture and Climate Impact Across the Almond Supply Chain



KIND Almond Acres Initiative. Photo courtesy of ofi.

A large-scale pilot project by ofi (Olam Food Ingredients) and KIND Snacks combines scientific research, regenerative agriculture practices, and advanced agricultural technology solutions to drive measurable environmental improvements in almond farming. This project was the winner of the 2026 INC Sustainability Award – Back to the Planet.

Climate change, water scarcity, soil degradation, and biodiversity loss are placing increasing pressure on the nut and dried fruit industry, particularly in regions where long-lived perennial crops like almonds are grown. California, which produces 80% of the world's almonds, faces some of the most urgent environmental challenges, making it a critical landscape for testing scalable, evidence-based sustainability solutions.

The KIND Almond Acres Initiative was created in response to this need through a collaboration between ofi and KIND, alongside research institutions such as UC Merced and UC Davis and the technology and sustainability innovators Nitricity, LandScan and Beewise. The project combines scientific research, regenerative agriculture practices, and advanced agricultural technology solutions to drive measurable environmental improvements in almond farming.

"In almond orchards, implementing a variety of regenerative practices such as cover crops, lower-carbon fertilizers, compost and biochar can directly enhance ingredient quality and resilience," commented Zac Ellis, Senior Director of Agronomy at ofi North America. "We are proud to partner with KIND to help demonstrate a model that can be replicated and scaled across the broader industry."

Implemented across 920 acres (about 370 hectares) of ofi-managed orchards, the initiative functions as a "living, learning lab" to evaluate which regenerative agriculture practices deliver the greatest environmental benefits in almond production. The project tests multiple interventions simultaneously, allowing researchers to assess both individual and combined impacts.

Five key practices are at the core of the initiative. First, cover crops—using five-species blends—are planted to improve soil structure, increase organic matter, enhance pollinator habitat, and build climate resilience. Second, subsurface irrigation delivers water directly to tree roots, helping to optimize water use in a drought-prone region. Third, a whole-orchard recycling trial is assessing the benefits of reincorporating chipped trees into the soil to increase carbon sequestration, nutrient availability and long-term fertility. Fourth, compost and biochar applications, including biochar derived from almond shells, aim to reduce fertilizer needs, increase soil carbon, and improve water retention. And finally, off-ground harvesting reduces dust pollution and minimizes soil disturbance during harvest.

Regenerative agriculture in almond production is still emerging, and many practices lack real-world data specific to California's climate and soil conditions. By testing multiple interventions at once, the initiative represents one of the most comprehensive regenerative almond pilots. Its collaborative model—bringing together operational expertise, sustainability leadership, academic research, and agricultural technology innovation—accelerates learning, strengthens scientific rigor, and increases the likelihood that successful practices can be scaled across the industry.

The project directly addresses key environmental challenges in almond production, including soil carbon depletion, water scarcity, fertilizer-related emissions and

> *"The project directly addresses key environmental challenges, including soil carbon depletion, water scarcity, fertilizer-related emissions and declining pollinator populations."*

declining pollinator populations. It also responds to the broader need for the food system to reduce greenhouse gas emissions and expand regenerative agriculture practices.

Early results demonstrate measurable environmental benefits. Water-use monitoring shows a significant improvement in irrigation efficiency, with water use per ton of almonds reduced from a baseline average of 4.35 megaliters per metric ton to 3.50 megaliters per metric ton during the project period—a 19.5% reduction. This improvement is driven by subsurface irrigation and improved soil structure resulting from regenerative practices.

Soil health and carbon storage are being strengthened through the combined use of cover crops, compost, biochar and whole-orchard recycling. These interventions increase soil organic matter, increase carbon sequestration and enhance long-term fertility. Healthier soils also support biodiversity and enable almonds to be grown in a more climate-positive way.

The initiative also contributes to emissions reduction and improved nutrient management. Fertilizer production, diesel use and field emissions have been identified as the largest contributors to orchard-level greenhouse gas emissions. Detailed emissions modeling is informing low-carbon nutrient strategies and precision agronomy tools are helping to improve nutrient-use efficiency.

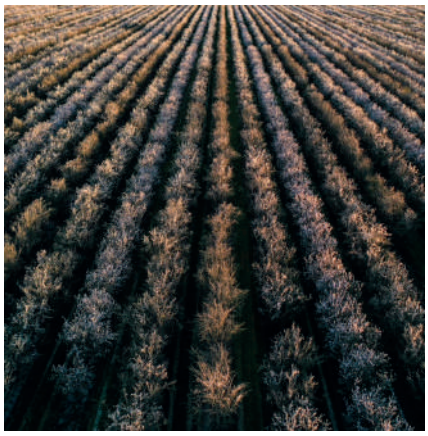
Air quality and soil protection are addressed through the transition to off-ground harvesting, which reduces dust emissions and minimizes soil disturbance. This benefits both environmental quality and surrounding communities, while helping maintain soil structure and reduce erosion.

Innovation is a defining feature of the project. LandScan's digital-twin technology creates a high-resolution virtual model of orchard conditions, enabling precise nutrient management, emissions modeling and regenerative practice optimization. Beewise autonomous bee homes provide climate-controlled, self-monitoring habitats that protect pollinators and strengthen colony health. Together, these tools help to create a data-driven, climate-resilient model for almond production.

The initiative is designed to be transparent and scalable. By publicly positioning the orchards as a research platform, the project generates practical, data-driven insights that can be shared with growers, researchers and industry stakeholders. The project has already expanded from 500 to 920 acres, demonstrating strong potential for broader adoption.

"One of the most important outcomes of the KIND Almond Acres Initiative was demonstrating that regenerative agriculture can work beyond a small pilot and be integrated into commercial almond production," said Caitlin Birkholz, Sustainability Impact Manager at KIND. "Working alongside ofi, we tested how regenerative practices and innovative technologies perform across different environments and saw promising results that can help growers improve on-farm resilience while advancing sustainability goals."

Beyond its immediate outcomes, the initiative offers a replicable model for other nut and dried fruit supply chains. By combining regenerative practices and scientific research, it demonstrates how environmental sustainability can be embedded directly into nut supply chains. The resulting insights support the transition toward climate-resilient, low-impact nut production, while contributing valuable knowledge to the wider industry.



KIND Almond Acres Initiative. Photo courtesy of ofi.

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Redefining the Meat-Free Category

Whitworths Nutty Kitchen Supermince is the UK's first unprocessed plant-based mince, made from a short list of whole ingredients: walnuts (55%), quinoa and lentils. Positioned as a minimally processed alternative to conventional meat substitutes, it delivers protein, fiber and essential micronutrients with the same versatility as meat mince. This product was the winner of the 2026 INC Innovation Award.



Whitworths Nutty Kitchen Supermince (Original flavor). Photo courtesy of Whitworths Limited.

Whitworths Nutty Kitchen Supermince redefines what meat-free mince can be. Unlike ultra-processed options, Nutty Kitchen's natural ingredients—walnuts, quinoa and lentils—deliciously deliver protein, fiber and essential micronutrients with the same versatility as meat mince. In addition to the Original variety, Whitworths Nutty Kitchen Supermince is available in three flavors: Indian, Mexican and Italian, each with a tailored seasoning blend.

The Category Insight

Consumers are increasingly looking to reduce their meat intake, creating sustained demand for alternatives to conventional meat. At the same time, parts of the UK plant-based category experienced declines between 2024 and 2025, suggesting a gap between consumer intent and current product offerings.

Several factors may help explain this disconnect:

1. Some consumers are increasingly seeking foods with simpler, more recognizable ingredients and may be reconsidering products perceived as highly processed.

2. In some cases, meat-analogue products are priced similarly to conventional meat, offering little incentive to switch.

3. Taste remains a decisive driver of repeat purchase, and some products fail to meet expectations.

There is a clear opportunity to create tasty, unprocessed and value-for-money alternatives to meat analogues, using nutrient-dense, versatile and delicious nuts as the key ingredient to deliver fiber, protein, texture and micronutrients.

What Is Nutty Kitchen Supermince?

Nutty Kitchen Supermince is made from three simple, natural, minimally processed ingredients: walnuts, lentils and red quinoa. Unlike many meat alternatives, it delivers not just plant protein and fiber but also manganese, copper and alpha-linolenic acid (ALA), an omega-3 essential fatty acid that is naturally abundant in walnuts. It cooks like meat mince, making it an easy swap for dishes like chili con carne, tacos, curries or pasta.

Product Variants

Nutty Kitchen Supermince comes in four product variants, three with a uniquely blended spice/seasoning sachet to easily create family-favorite mince-based dishes, while tapping into the growing meal-kit trend. Simply add water, a tin of chopped tomatoes, a red onion and your choice of a side dish (rice, pasta, tacos, etc.) for a meal to feed four.

- Original: Unseasoned, letting cooks add their own herbs and spices
- Italian: Garlic, oregano, bay leaves, nutmeg and red wine powder
- Mexican: Nutty cumin, cayenne and cinnamon
- Indian: Coriander, cumin, Kashmiri chili and cardamom

> *"There is a clear opportunity to create tasty, unprocessed and value-for-money alternatives to meat analogues, using nuts as the key ingredient."*

Who Is It For?

Nutty Kitchen Supermince is for anyone looking to reduce meat intake, including flexitarians, vegans or those wanting more nutrient-dense, plant-based meals. As the first of its kind to use walnuts as the hero ingredient, it offers a 100% natural, nutrient-dense alternative to both meat mince and meat-analogue mince.

According to the market research firm Kantar, consumption of meal kits in the UK increased by 4 million from 2020 to 2024, driven by demand for convenient, healthier home-cooked

options.[1] While scratch cooking declines, meal-kit solutions that fit busy lifestyles are expanding. Nutty Kitchen Supermince uniquely pulls together two clear opportunities: innovation in the meat alternatives category that answers the three challenges faced by plant-based products with convenient, healthy meal kits.

Driving Incremental Nut Consumption

In the UK, around 90% of walnut consumption occurs as specific recipe ingredients or small healthy snacks. Nutty Kitchen Supermince changes this by placing walnuts at the center of the plate, creating new meal occasions for walnuts and increasing consumption at scale.

Accessing New Categories

This is the first innovation of its kind to be retailed in the plant-based/meat-alternative chillers, next to brands such as Quorn and Beyond Meat—thus accessing consumers who might not have intended to shop the nuts, seeds and dried fruit fixture in their chosen supermarket—providing incremental access to consumers across a new dinner/lunch meal occasion.

The First Launch of a Pipeline of Walnut-Based Innovation

Nutty Kitchen Supermince is the first in a three-year innovation pipeline of products that puts walnuts at the center of innovation to access more categories. This innovation will include—but is not limited to—burgers, instant hot meals and quick-cook solutions.

In addition to winning the 2026 INC Innovation Award, Nutty Kitchen Supermince received the UK's 2026 Product of the Year Award in the meat-free category.

For more information: www.whitworths.co.uk

Reference: 1. *Kantar Usage Panel*. Meals by cooking type, 52 w/e December 1, 2024 vs. 2020.



Also available in Mexican, Indian and Italian flavors. Photos courtesy of Whitworths Limited.



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Country/Product Spotlight

Walnuts & China



This edition is the 20th in our series of industry and market overviews in *Nutfruit* magazine. This report provides a snapshot of China's walnut industry, with data, analysis and trends.

We would like to thank the China Chamber of Commerce for Import and Export of Foodstuffs, Native Produce and Animal By-Products (CFNA) for their collaboration on this edition.

Industry Highlight
An overview of production, trade and consumption

Determining Water Status of Walnut Orchards in China via Canopy Temperature Measurements
Research in China explores a quick, effective method of assessing water stress in walnut orchards

Walnuts and Wellness
Long appreciated for their role in a balanced diet, walnuts offer a simple, satisfying way to support overall health

New Product Launches
Explore new products featuring walnuts

Industry Highlight

The Chinese Walnut Industry in Numbers

1.5 M MT
production
(in-shell basis, 2025/26)

390,690 MT
estimated domestic consumption
(kernel equivalent, 2025)

223,063 MT
in-shell exports
(2024/25)

142,192 MT
shelled exports
(2024/25)

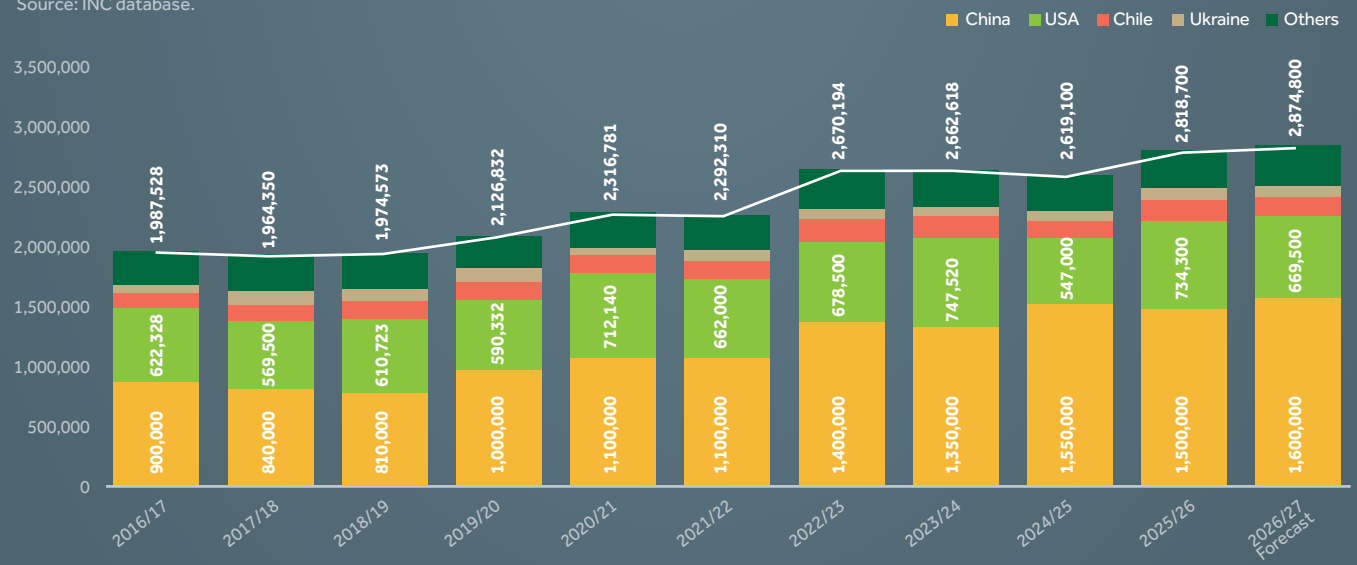
94
export destinations

Production

Walnuts have been cultivated in China for more than 3,000 years and are grown across 21 provinces and autonomous regions, making the country the world's largest producer and consumer, accounting for more than half of global production. Xinjiang and Yunnan are the largest producing regions, accounting for approximately 75% of national production. Cultivation is dominated by small family growers, with average farm holdings typically below one hectare and more than half of walnut trees planted in hilly and mountainous areas. China also has a highly diversified genetic base, with over 50 varieties grown. Most orchards are already in the bearing phase. Following a period of rapid expansion between 2016 and the start of the COVID-19 pandemic, new plantings have largely ceased as low walnut prices have reduced incentives for further investment.

China has remained the world's largest walnut producer over the past decade. Production increased from 900,000 metric tons (in-shell) in 2016/17 to 1.5 million MT in 2025/26, and a forecasted 1.6 M MT in 2026/27, representing an increase of nearly 78%. The most rapid expansion occurred between 2019/20 and 2022/23, driven by the entry of young orchards into commercial production. Since then, output has remained consistently above 1.3 million MT and is expected to reach a new record in 2026/27, accounting for approximately 56% of global production, compared with around 46% a decade earlier (Figure 1).

Figure 1. World Walnut Production, In-shell, Crop Years 2016/17-2026/27, Metric Tons
Source: INC database.



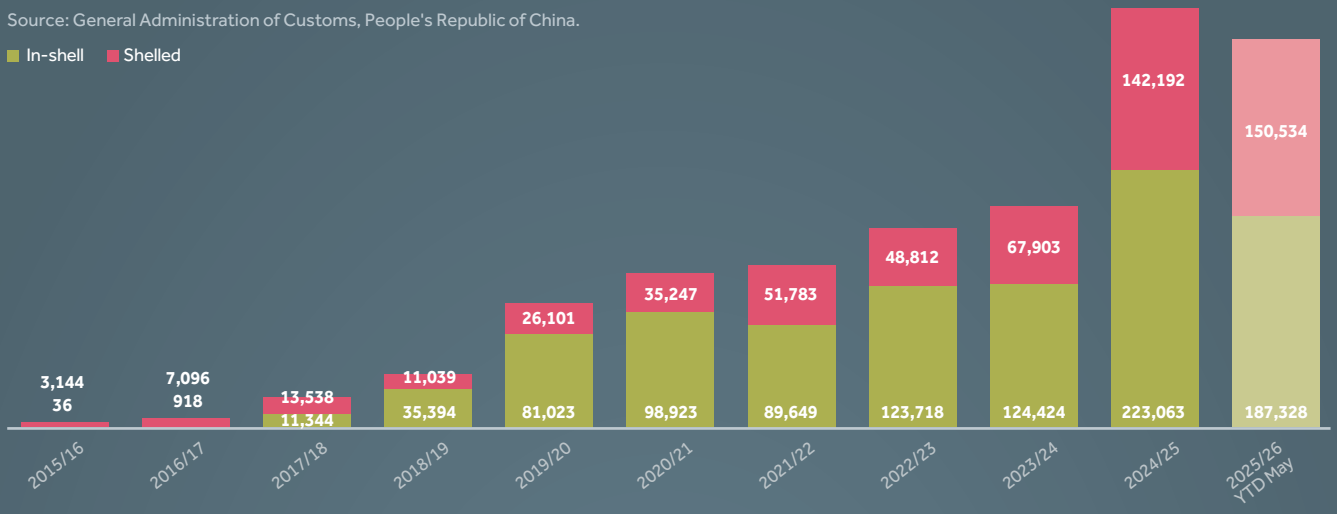
Exports

China has transformed its position in the global walnut export market over the past decade. Both in-shell (HS code 080231) and shelled (HS code 080232) export shipments have expanded at an exceptional pace, supported by rising production and improved processing capacity.

The acceleration has occurred over the last decade and has been particularly pronounced in recent seasons. In-shell exports increased from just 36 MT in 2015/16 to 223,063 MT in 2024/25 (Figure 2). Growth has remained strong throughout the past five marketing years, with exports almost tripling from 81,023 MT in 2019/20 to 223,063 MT in 2024/25, an increase of 175% (Table 1a).

Figure 2. China Walnut Exports, In-shell (HS 080231) and Shelled (HS 080232), Marketing Years 2015/16-2024/25 (September-August), 2025/26 (September-May), Metric Tons

Source: General Administration of Customs, People's Republic of China.



Exports of shelled walnuts have followed an even steeper trajectory. Shipments rose from 3,114 MT in 2015/16 to 142,192 MT in 2024/25 (Figure 2), including a 445% expansion over the past five seasons alone (Table 1b). The rapid growth reflects both rising international demand for value-added products and significant investments by Chinese processors in sorting technology, processing equipment and operational efficiency.

Table 1. China Walnut Exports, (a) In-shell (HS 080231) and (b) Shelled (HS 080232), Marketing Years 2019/20-2024/25 (September-August), Metric Tons

Source: General Administration of Customs, People's Republic of China.

(a) In-shell Walnut Exports From China, Metric Tons, 2019/20-2024/25 (September-August)

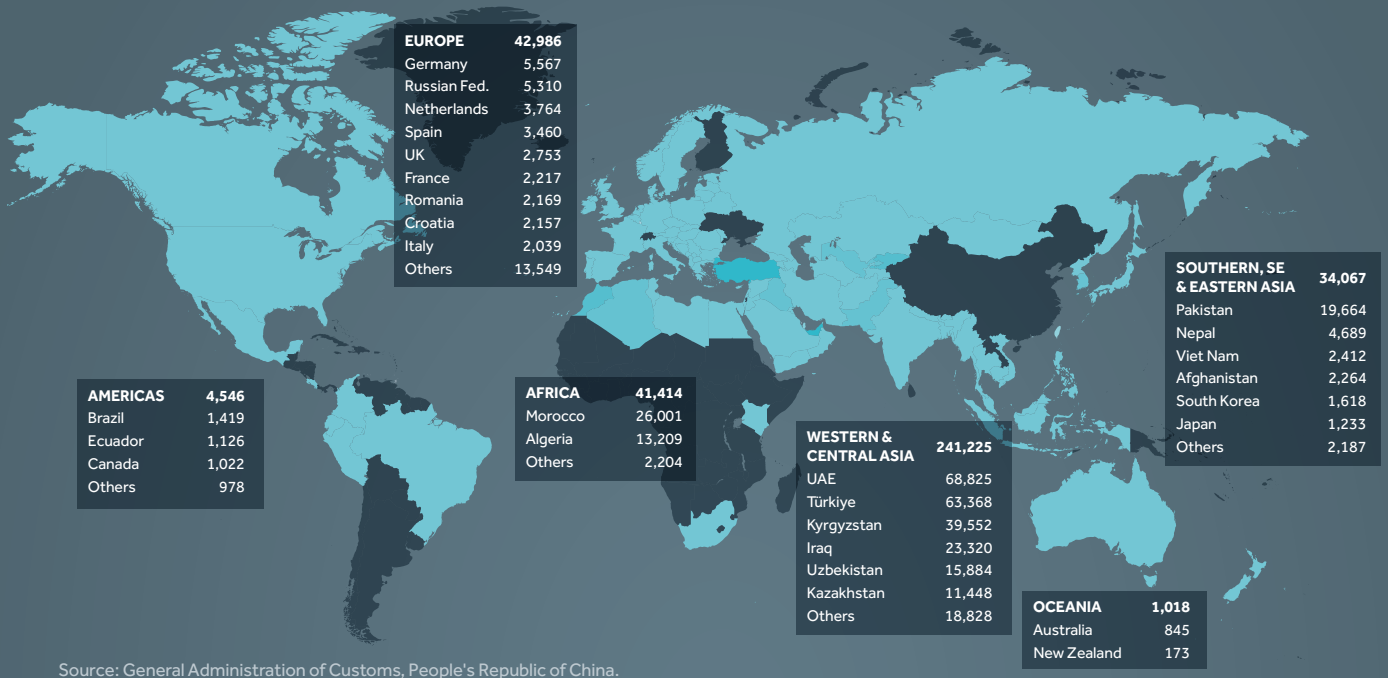
Destination	2019/20	2024/25	Growth (%)
Western & Central Asia	**64,620**	**156,496**	**142%**
UAE	8,087	57,000	605%
Türkiye	13,832	44,853	224%
Iraq	600	17,874	2,881%
Kyrgyzstan	31,754	15,259	-52%
Uzbekistan	0	11,108	-
Others	10,348	10,403	1%
Africa	**3,954**	**35,800**	**805%**
Morocco	2,481	26,001	948%
Algeria	1,453	9,277	538%
Others	20	523	2,513%
Southern, SE & Eastern Asia	**11,483**	**26,871**	**134%**
Pakistan	10,018	18,103	81%
Nepal	618	4,650	653%
Afghanistan		1,948	-
Viet Nam	573	1,476	158%
Others	274	693	153%
Europe	**928**	**3,831**	**313%**
Americas	**32**	**56**	**77%**
Oceania	**7**	**10**	**47%**
Grand Total	**81,023**	**223,063**	**175%**

(b) Shelled Walnut Exports From China, Metric Tons, 2019/20-2024/25 (September-August)

Destination	2019/20	2024/25	Growth (%)
Western & Central Asia	**14,776**	**84,729**	**473%**
Kyrgyzstan	9,805	24,293	148%
Türkiye	1,423	18,515	1,201%
UAE	678	11,826	1,643%
Kazakhstan	1,232	6,867	458%
Iraq	459	5,445	1,086%
Others	1,179	17,783	1,408%
Europe	**7,680**	**39,155**	**410%**
Germany	1,348	4,832	258%
Russian Federation	2,152	4,648	116%
Netherlands	887	3,685	315%
Spain	372	3,220	766%
UK	1,300	2,632	102%
France	101	2,217	2,088%
Romania	-	2,169	-
Croatia	100	2,000	1,900%
Others	1,420	13,751	869%
Southern, SE & Eastern Asia	**2,392**	**7,197**	**201%**
South Korea	5	1,618	30,936%
Pakistan	63	1,561	2,368%
Japan	1,425	1,226	-14%
Others	899	2,791	210%
Americas	**704**	**4,490**	**538%**
Brazil	51	1,419	2,666%
Ecuador		1,110	-
Others	653	1,961	200%
Africa	**366**	**5,614**	**1,432%**
Algeria	185	3,932	2,025%
Others	181	1,681	827%
Oceania	**182**	**1,008**	**455%**
Grand Total	**26,101**	**142,192**	**445%**

China's export market has diversified considerably over the past decade. In 2024/25, walnuts were shipped to 94 destinations (Figure 3), compared with 64 in 2019/20 and only 22 in 2015/16.

Figure 3. China Walnut Export Destinations, In-shell (HS 080231) Plus Shelled (HS 080232), Marketing Year 2024/25 (September-August), Metric Tons



Source: General Administration of Customs, People's Republic of China.

Western and Central Asia has become the leading market for in-shell walnuts, with imports increasing 142% over the past five seasons to 156,496 MT, representing around 70% of total exports in 2024/25. Particularly notable has been the surge in shipments to the United Arab Emirates (+605%) and Türkiye (+224%), alongside the rapid expansion of exports to Iraq and Uzbekistan. African markets have also gained importance, with imports rising more than eightfold (+805%) over the same period. Morocco has emerged as the principal African destination, with imports increasing from 2,481 MT to 26,001 MT. Southern, Southeast and Eastern Asia also strengthened their position, driven by sustained growth in Pakistan. Although exports to Europe and the Americas remain comparatively modest, both regions have also recorded steady growth (Table 1a).

Growth in shelled walnut exports has been even more geographically diverse. Western and Central Asia remained the largest destination, with imports increasing 473% to 84,729 MT, driven by exceptional growth in Türkiye (+1,201%), the UAE (+1,643%) and Kyrgyzstan (+148%). At the same time, exports to Europe expanded more than fivefold (+410%) to 39,155 MT, with particularly strong increases in Spain, Germany and the Netherlands, highlighting China's growing presence in higher-value processed walnut markets. Exports to other regions also increased from a low base. Shipments to Africa, the Americas and Southern, Southeast and Eastern Asia expanded over the past five seasons, although these accounted for a relatively smaller share of China's shelled walnut exports (Table 1b).

Additionally, China's surging walnut kernel exports have been supported by independent fine seed breeding and the development of domestic high-quality germplasm resources. Xinjiang has achieved remarkable progress in this field, while Yunnan and other producing regions have also rolled out multiple new improved varieties.

"Opening up Western Asian markets and consolidating and expanding Middle Eastern markets has been critical to boosting global Chinese kernel exports."

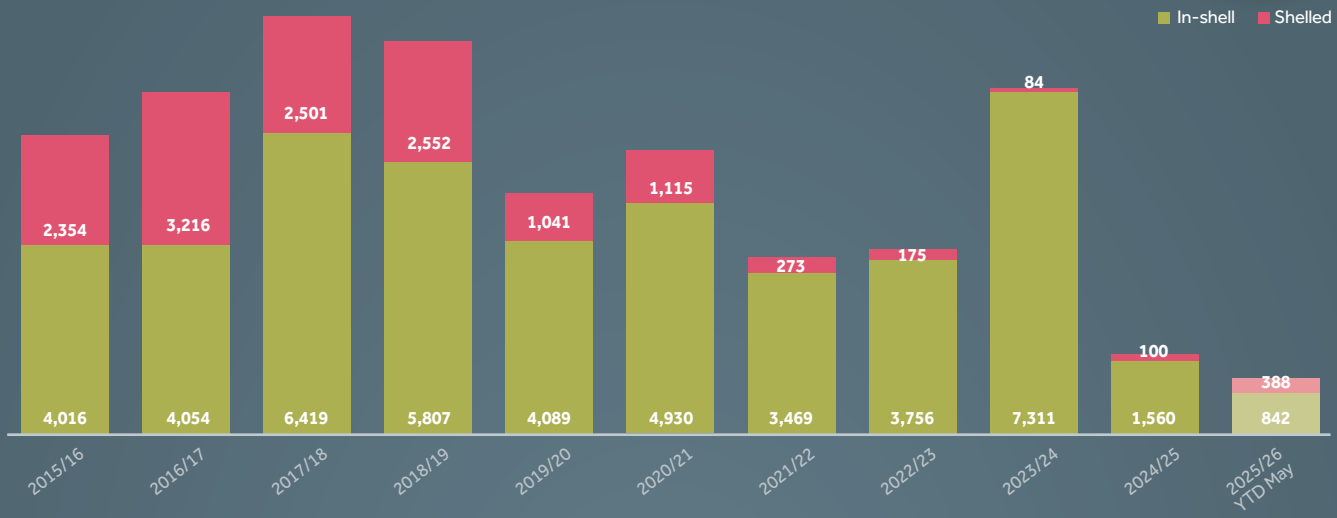
Imports

China's walnut imports remain limited compared with exports, reflecting the country's strong reliance on domestic production. Import shipments have had a dramatic swing over the past 20 years and have dropped significantly since 2010. Over the past decade, inbound volumes have fluctuated, with in-shell walnuts accounting for most imports. After peaking at 7,395 MT in 2023/24, imports declined sharply in 2024/25 and remained low in 2025/26 year-to-date through May. Shelled imports have been consistently small (Figure 4).



Figure 4. China Walnut Imports, In-shell (HS 080231) and Shelled (HS 080232), Marketing Years 2015/16-2024/25 (September-August), 2025/26 (September-May), Metric Tons

Source: General Administration of Customs, People's Republic of China.



Domestic Consumption

China's domestic walnut consumption has increased substantially over the past decade, rising from 252,613 MT (kernel equivalent) in 2015 to consistently above 490,000 MT between 2022 and 2024, with a record 516,100 MT reached in 2022 (Figure 5). The expansion has been supported by growing domestic production and the wider availability of value-added products. Although consumption eased in 2025, it remained well above levels recorded during the first half of the previous decade, highlighting the sustained growth of the domestic market.

Domestic consumption has continued to benefit from competitive pricing relative to other nuts and the introduction of new product formats. Premium organic walnuts from Yunnan province have gained traction in high-end retail channels, while fresh peeled and blanched walnuts have emerged as a rapidly growing category. These products help diversify consumption beyond traditional uses.

Figure 5. China Estimated Walnut Consumption, Kernel Equivalent, 2015-2025, Metric Tons

Sources: INC, UN Comtrade and General Administration of Customs, People's Republic of China.



Walnuts and Wellness

When it comes to nutrition, walnuts pack a punch—with a crunch! Long appreciated for their role in a balanced diet, they offer a simple, satisfying way to support overall health and everyday well-being.

Nutritional Value

The walnut's nutritional properties help explain why this versatile nut is regarded as a healthy dietary choice. Walnuts are high in polyunsaturated fats—including omega-3 fatty acids such as alpha-linolenic acid—as well as fiber, vitamin B_1, vitamin B_6, and minerals such as phosphorus, magnesium, manganese, copper and zinc. In addition, walnuts are a source of iron and potassium.[1]

These nutrients play key roles in supporting overall health. Alpha-linolenic acid contributes to maintenance of normal blood cholesterol levels, while vitamins B_1 and B_6 support normal energy metabolism and nervous system function. Minerals such as phosphorus and magnesium contribute to the maintenance of normal bones and teeth. Manganese and copper help protect cells from oxidative stress, while zinc and iron support the normal function of the immune system.[2]

Insights From Clinical Research

Thanks to their nutrient profile, walnuts have gained considerable scientific interest, with substantial evidence supporting their role in cardiovascular health. According to a comprehensive review[3] published in 2024, walnut consumption may have beneficial effects on multiple cardiovascular risk factors. Bioactive compounds in walnuts—including omega-3 fatty acids, antioxidants, fiber and polyphenols—have been shown to improve lipid profiles, blood pressure, endothelial function, inflammation, oxidative stress and thrombosis. Overall, the evidence suggests that daily walnut consumption may reduce the risk of cardiovascular diseases like coronary heart disease and stroke through multiple complementary mechanisms, including improved lipid profiles and reduced inflammation. More recently, a meta-analysis[4] of randomized controlled trials provided further evidence that walnut intake has a reducing effect on levels of apolipoprotein B, a strong predictor of cardiovascular disease risk. Reflecting this growing body of evidence on cardiovascular health, the European Food Safety Authority has recognized that walnuts contribute to improving the elasticity of blood vessels. Notably, walnuts are among the few foods with a European Commission-authorized health claim specifically linked to the food itself. Under Commission Regulation (EU) No 432/2012, the European Commission approved the following health claim: "Walnuts contribute to the improvement of the elasticity of blood vessels." This beneficial effect is achieved with a daily intake of 30 g (approximately a handful) of walnuts.[2]

Research has also explored the relationship between walnuts and the gut microbiota. One randomized controlled trial[5] found that walnut consumption alters the composition and functional activity of the human gastrointestinal microbiota. A controlled-feeding crossover study[6] further showed that, compared to diets without walnuts or with different fatty acid profiles, a walnut-enriched diet increased the expression of bacterial genes involved in the production of metabolites such as homoarginine, which has been associated with lower cardiovascular risk.

These gut-mediated effects may help explain how walnut consumption influences health beyond the digestive system. One study examined the cancer-protective effects of walnuts, focusing on the role of urolithin A—a compound associated with anti-inflammatory and potential anti-cancer properties that is produced in the gut when certain polyphenols found in walnuts are metabolized. Participants with colonic polyps, a common precursor to colorectal cancer, were instructed to eat 56 grams of walnuts daily for 3 weeks. Researchers found that walnut consumption led to increased urinary levels of urolithin A, though production varied among individuals. Notably, participants with higher urolithin A levels had lower concentrations of several inflammatory markers in the blood. Researchers concluded that walnut-derived urolithin A may support colonic health by reducing systemic and tissue-level inflammation.[7]

Beyond cardiovascular and gut-related effects, the evidence suggests broader health implications. Research has found an association between walnut consumption and cognitive function in older adults,[8] and also suggested a potential link between walnut consumption and lower diabetes risk.[9] Multiple studies have found that walnuts can be enjoyed without leading to weight gain. A randomized parallel trial[10] comparing healthy older adults who ate walnuts providing approximately 15% of daily energy intake to a control group found no adverse effects on body weight or body composition. Similarly, a cross-sectional study[11] in adolescents and young adults observed inverse associations between obesity and walnut consumption, particularly when combined with other nuts.

Conclusion

Research continues to expand our understanding of the effects of walnuts on human health. The evidence points to benefits that extend across cardiovascular health, gut microbiota composition, brain function, diabetes risk, and weight management. Incorporating a daily handful of walnuts into a balanced diet is a simple, evidence-based habit that can support long-term health and contribute meaningfully to overall wellness.

KEY HEALTH BENEFITS

- Cardiovascular health
- Gut microbiota
- Cognitive function
- Diabetes prevention
- Weight management

HIGH IN:
Polyunsaturated fat (including omega-3 fatty acids such as alpha-linolenic acid), fiber, vitamin B_1, vitamin B_6, and minerals such as phosphorus, magnesium, manganese, copper, and zinc.

SOURCE OF:
Iron and potassium

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Banana Walnut Cookies

Ingredients:

- 150 g hazelnuts (to make flour)
- 50 g walnuts (to make flour)
- ½ tsp baking soda
- 1 tsp cinnamon
- ¼ tsp salt
- 100 g butter
- 10-11 dates
- 2 very ripe bananas
- 10 g ground flaxseed
- 45 ml water
- 1 tsp vanilla extract
- 50 g chopped walnuts

Preparation:

1. To make the flour, toast the walnuts and hazelnuts separately in the oven for 10 minutes. Grind the walnuts into flour. Remove the hazelnut skins, then grind the hazelnuts into flour.
2. Mix the ground flaxseed with water in a small bowl and let sit for 5 minutes, until it thickens and becomes gelatinous.
3. In a large bowl, combine the hazelnut flour, walnut flour, baking soda, cinnamon and salt.
4. Blend the dates with 2-3 tablespoons of hot water to make a smooth paste.
5. Using an electric mixer, beat the butter and date paste together until creamy.
6. Add the mashed bananas, the flaxseed mixture, and the vanilla extract to the butter mixture. Mix until well combined.
7. Add the dry ingredients to the wet mixture. Gently fold with a spatula until no dry spots remain.
8. Add the chopped walnuts and mix gently to distribute evenly.
9. Using a spoon, form dough balls and place them on a parchment-lined baking sheet, spacing them apart.
10. Bake at 180°C for about 12 minutes, or until the edges are lightly golden and the tops are set. Let the cookies rest on the baking sheet for 10 minutes.
11. Transfer the cookies to a wire rack to cool completely.

Determining Water Status of Walnut Orchards in China via Canopy Temperature Measurements

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Walnut growers need to know when their trees are becoming water-stressed so they can irrigate efficiently. Too little water reduces yield and quality, while too much water wastes a scarce resource. Our research in China explored whether methods based on measuring canopy temperature could provide a faster, practical way to assess water stress in walnut orchards.

Shortages of water for irrigation are becoming increasingly severe in walnut orchards in parts of China, particularly in the arid regions of the country's northwest. Accurately assessing walnut trees' water status at different stages of growth is essential to implementing deficit irrigation strategies and improving yield.

Canopy temperature monitoring can help growers apply the right amount of water at the right time. This improves water-use efficiency, supports climate resilience, protects natural water resources and helps maintain production under increasingly water-limited conditions—making it a valuable contribution to sustainable agriculture.

The crop water stress index (CWSI), an approach based on measuring canopy temperature, is one of the most commonly used tools in current research on plant water monitoring. However, under field conditions, the suitability and effectiveness of using the CWSI as an indicator of walnut water status remain unclear. Moreover, there is no consensus regarding the performance of different methods of calculating CWSI.

In a study carried out in northwestern China,[1] we tested two CWSI calculation methods—which differ in how the upper and lower temperature baselines are determined—to see how effective they were at tracking diurnal and daily variations in water conditions in walnut orchards. Specifically, we tested the simplified crop water stress index ($CWSI_s$), which uses dry and wet reference surface temperatures, and the theoretical crop water stress index ($CWSI_t$), which more comprehensively considers environmental factors. To do this, we conducted synchronous monitoring of canopy temperature, meteorological parameters, and water physiological parameters of walnut trees under both full irrigation and deficit irrigation treatments.

We found that the $CWSI_s$ was able to reflect the diurnal and daily changes in the water status of walnut orchards. The $CWSI_s$ at 12:00 pm local time had the best performance in tracking daily changes in water status. In most previous studies using the $CWSI_s$, researchers wet the leaves about 1 minute before measurements. In our study, we reduced this interval to a more efficient 10 seconds without detriment to the measurements. In contrast, the $CWSI_t$ was unable to track diurnal variations in water status in walnut orchards due to errors in the calculation of aerodynamic resistance in walnut trees, which led to the underestimation of water stress. Variations in minimum canopy resistance at various stages of growth may also affect the accuracy of the $CWSI_t$ in terms of indicating seasonal water status changes in walnut orchards.

Overall, we found that the $CWSI_s$ provided a quick, effective and non-destructive method for monitoring the water status of walnuts. However, our findings suggest that the $CWSI_t$ may give inaccurate results in walnut orchards because it relies on simplified assumptions about air flow around the canopy and about how the trees regulate water loss—factors that change across the tree's growth stages.

> *"The simplified crop water stress index provided a quick, effective and non-destructive method for monitoring the water status of walnuts."*

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New Product Launches

Prized for their distinctive flavor, satisfying crunch and natural appeal, walnuts continue to earn their place at the heart of today's food innovation. Equally at home in sweet and savory applications, they offer both culinary versatility and nutritional value—qualities that resonate strongly with modern consumers. As interest in plant-based, better-for-you products accelerates, manufacturers are finding new and creative ways to showcase walnuts across a diverse array of launches. Here, we explore a selection of recent launches that underscore walnuts' growing role in product innovation.



Three Squirrels Yunnan Organic Walnuts

China

Sourced directly from the plateau, these organic walnuts feature thin, easy-to-crack shells and a fresh, crisp flavor.



Chacha Amber Walnut Kernels

China

These premium seasonal large walnuts are baked, not fried, and ultrasonic deastringency technology reduces their astringency by over 60%.



Kingland Blanched Walnut Kernels

China

With reduced bitterness, skin flakes and impurities, these kernels are ideal for high-end baking, cereal mixes and plant-based foods.



Senbao Foods Lophatheri Herba Longjing Walnut Kernel

China

Blending powdered lophatheri herba and Longjing tea with a gentle chocolate coating, these walnuts deliver layered notes of crisp bamboo and nutty richness.



Qingdao Juyuan Food Xin2 Extra Light Halves Top Select

China

A double selection process ensures the uniform color and quality of these walnut halves.



Xiyu Meinong DHA Sesame Walnut Crisps

China

These honey-sweetened crisps are made with Xinjiang walnut kernels and black sesame, fortified with DHA algae oil, and lightly baked for a satisfying crunch.



Shen Dacheng Sugar-Free Black Sesame Walnut Pastry

China

Large whole walnut kernels are slowly roasted at low temperature and wrapped in a pastry made with cocoa and finely ground mung-bean powder.



Freshippo Matcha Longjing Walnut Kernels

China

Made with premium Ya'an bamboo powder and superfine ground Longjing tea, these Chinese-style walnut kernels are tailored to local tastes.

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



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Dr. Kendall studied at the University of Toronto, obtaining his Honors BSc, MSc and PhD. His primary research interest is the role of diet in the prevention and treatment of chronic disease.

Diabetes is one of the most significant health concerns globally. Nuts have shown promise in their ability to prevent and control diabetes. More research is needed to strengthen the scientific evidence to support their direct inclusion in diabetes-related dietary guidelines and health claims.

Diabetes, a metabolic disorder characterized by sustained elevated blood sugar levels, is one of the most globally challenging health issues. Over the past 50 years, there has been an alarming increase in the prevalence of diabetes, which now affects over 11% of adults worldwide.[1] Diabetes is a chronic condition associated with many complications, including cardiovascular disease, chronic kidney disease, nerve damage and vision loss. Consequently, it is a global health challenge with significant medical, quality-of-life and economic implications. While there are effective medications for the control of diabetes, diet and lifestyle are the cornerstone for its prevention and management.

The rise in diabetes rates has been linked to sedentary lifestyles, increased obesity prevalence, and a changing diet, which has shifted from traditional whole foods (leafy vegetables, fruit, whole grains, nuts/seeds), to increased reliance on processed foods. Of the dietary components, tree nuts are of great interest because of their unique macro- and micronutrient profile. Nuts contain healthy mono- and polyunsaturated fatty acids (MUFAs and PUFAs), vegetable protein, fiber, polyphenols, vitamins and minerals. Current dietary guidelines recommend eating nuts to lower blood cholesterol and reduce coronary heart disease risk,[2,3] and a qualified health claim for nuts has further recognized these benefits.[4] Current recommendations for diabetes prevention focus on intensive lifestyle interventions aimed at weight loss through energy-restricted healthful diets and increased physical activity.[2,3] Diabetes dietary guidelines also recommend the Mediterranean diet and vegetarian dietary patterns, which encourage nut consumption.[2,3] However, the role of nuts in the prevention and control of diabetes is not directly recognized, and there are currently no diabetes-related health claims permitted for nuts.

There is clear evidence from population (cohort) studies that frequent nut consumption is associated with protective effects against developing cardiovascular disease and reduced mortality from this disease. However, the epidemiological evidence for nuts and diabetes has been less consistent. Some studies, including the Harvard Nurses' Health Study with about 84,000 participants found that frequent nut consumption was associated with a significantly reduced risk of developing diabetes,[5] while others have found no effect,[6] possibly owing to the different methods used in their statistical approach.

Clinical studies indicate nuts may help improve blood glucose control in people with diabetes. In a large clinical study[7] and a systematic review and meta-analysis of trials,[8] nuts improved blood sugar control, and lowered HbA1c (a diabetes marker),

"Research suggests that nuts decrease the rise in blood sugar after a meal, which may help prevent and control diabetes."

and fasting glucose. The improvements appear to be partly due to high-glycemic-index carbohydrates being replaced with healthy fats and protein from nuts. In addition, studies suggest that nuts lower the rise in blood glucose after a meal. Nuts contain low amounts of available carbohydrate, so when eaten alone, they do not increase blood glucose levels.[9,10] When nuts are included in a high-carbohydrate meal, they reduce the rise in blood glucose in a dose-dependent manner: the more nuts are consumed, the lower the increase in blood glucose. The lowering of blood glucose after eating is thought to relate to the high level of fat, protein and fiber in the nuts, which slows the release of food into the small intestine and the absorption of nutrients.

Limiting the rise in blood glucose post-meal is important in the prevention and control of diabetes. The well-established antihyperglycemic drug acarbose is one medication used to achieve this. It is administered before meals and inhibits digestive enzymes, slowing the absorption of carbohydrate. In recent years, two well-designed clinical trials have examined this potential in nuts. In both studies, small doses of nuts (20-30 grams) were eaten 30 minutes prior to meals, with a total daily intake of 60 grams per day.[11,12] The studies had very positive effects on blood glucose control,[11,12] with 23% of subjects improving so much that they reverted from pre-diabetes to having normal blood glucose levels.[11]

To date, the scientific evidence is very encouraging and offers an opportunity to further study the potential for nuts to help prevent and manage diabetes. With support from the INC, an international team of researchers, including myself, will conduct a large clinical trial to assess the effect of small doses of mixed nuts eaten before meals on diabetes prevention. The PRENUT (PREloads of mixed NUTs for diabetes prevention) multi-centre trial will examine whether mixed nuts can prevent the development of diabetes in high-risk individuals across three continents and four countries (Canada, the United States, Spain and India). This study is poised to help drive the inclusion of nuts in diabetes-related dietary guidelines and health claims globally. For further information about the PRENUT trial, please see the article by Prof. Jordi Salas-Salvadó on page 38 of this edition of *Nutfruit*.

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Mixed Nuts in Diabetes Prevention: The PRENUT Trial Begins



PROF. JORDI SALAS-SALVADÓ

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Type 2 diabetes threatens to overwhelm global healthcare systems, yet current prevention strategies remain insufficient. The PRENUT trial, funded by the INC, represents a groundbreaking approach: testing whether mixed nuts, consumed strategically before meals, can prevent diabetes in high-risk individuals.

The Diabetes Emergency

We face an unprecedented global health crisis. Diabetes affects over 500 million people worldwide, with projections suggesting this number will reach 1.3 billion by 2050.[1] The economic impact has been described as an "economic tsunami," threatening not only individual lives but entire healthcare systems and national economies. Despite numerous public health initiatives, diabetes incidence continues to rise at alarming rates.

Diet represents the single most important modifiable risk factor for diabetes prevention, accounting for more than 25% of the global disease burden from non-communicable diseases. Yet current dietary recommendations for diabetes prevention remain frustratingly generic: lose weight, eat healthfully, exercise more. We need specific, evidence-based dietary interventions that people can actually implement in their daily lives.

The Missing Piece: Nuts in Diabetes Prevention

Here's a surprising gap: while nuts are recognized in clinical guidelines and health claim frameworks for reducing cholesterol and heart disease risk, they receive virtually no recognition for diabetes prevention. Current recommendations for nuts in diabetes management are consistently graded as only "low to moderate" quality evidence. Globally, no diabetes-related health claims are permitted for nuts, only for dietary fibers like oat beta-glucans and for yogurt.

This gap exists despite compelling scientific evidence. Randomized trials have shown that tree nuts reduce HbA1c and fasting blood glucose in people with type 2 diabetes. The mechanisms appear clear: nuts lower the overall glycemic load of the diet by displacing high-glycemic carbohydrates. Even more intriguingly, acute feeding studies demonstrate that nuts can blunt the blood sugar spike after carbohydrate-rich meals, especially when consumed as a "preload" 30 minutes before eating.

Two recent trials from South Asia provide particularly compelling evidence. In one study, 60 grams of almonds daily (20 grams before each main meal) helped adults with prediabetes revert to normal blood sugar levels over 12 weeks.[2] A similar trial with pistachios showed comparable benefits.[3] These results suggest that strategic nut consumption—timed specifically to reduce post-meal glucose spikes—might actually prevent diabetes from developing in high-risk individuals.

Enter PRENUT: A Game-Changing Trial

The PRENUT (PREloads of mixed NUTs for diabetes prevention) trial represents the most ambitious investigation ever undertaken into nuts and diabetes prevention. Funded by the INC, this trial will provide the gold-standard evidence needed to transform clinical guidelines and health policy.

PRENUT will enroll 752 high-risk adults across four countries on three continents: Canada (Toronto), USA (Loma Linda), Spain (Reus) and India (Chennai). All participants have obesity, a family history of diabetes, and prediabetes confirmed by oral glucose tolerance testing. These are precisely the individuals who need effective prevention strategies most urgently.

The intervention is elegantly simple: participants will receive 20 grams of mixed nuts (at least three varieties) in convenient, pre-portioned packets to consume 30 minutes before each main meal, three times daily (a total of 60 grams per day). They will be instructed to chew the nuts for at least five minutes and reduce an equivalent amount of refined carbohydrates during the meal. The control group will receive standard lifestyle advice about healthy eating and physical activity.

Over three years, researchers will track who develops type 2 diabetes, using rigorous diagnostic criteria and annual glucose tolerance testing. Secondary outcomes will include insulin sensitivity, beta-cell function, weight, waist circumference, blood pressure, liver health markers, inflammation, lipids and even gut microbiome changes.

Why This Matters for the Nut Industry

Success in PRENUT would be transformative not just for public health, but for the entire nut sector. Currently, no diabetes-related health claims exist for nuts anywhere in the world. High-quality evidence from PRENUT could change that, opening doors to:

- **Health claims:** Regulatory approval for diabetes risk reduction claims on nut products globally, similar to existing heart health claims.
- **Clinical guidelines:** Inclusion of specific nut recommendations in diabetes prevention guidelines from major medical organizations worldwide.
- **Public health policy:** Integration of nuts into national dietary strategies, institutional food procurement policies, and nutrition programs in schools, hospitals and public institutions.
- **Market growth:** Increased consumer awareness and demand for nuts as a science-backed functional food for metabolic health.

The trial's multi-country design is particularly strategic. By demonstrating effectiveness across diverse populations—North American, Mediterranean and South Asian—PRENUT will provide a high level of evidence applicable to global markets and regulatory frameworks.

COULD A HANDFUL OF NUTS HELP PREVENT TYPE 2 DIABETES?

The question PRENUT is asking:
Can eating a small portion of mixed nuts before meals help delay or prevent type 2 diabetes?

How it works:

Breakfast	Lunch	Dinner
20 g mixed nuts	20 g mixed nuts	20 g mixed nuts
30 min before meal	30 min before meal	30 min before meal

Control group:
Another group will continue with standard healthy eating and physical activity advice.

Study length	Participants	Research centers
Total study duration: 5 years Study intervention: 3 years	752 adults	Canada, India, Spain, USA

> *"Funded by the INC, this trial will provide the gold-standard evidence needed to transform clinical guidelines and health policy."*

A Model of Independent Research With Industry Support

The INC's investment in PRENUT exemplifies responsible industry funding of rigorous, independent research. Crucially, while the INC provides financial support, it has no involvement in the trial's design, conduct, data analysis, interpretation of results or publication decisions. These remain entirely under the control of the independent research team led by internationally recognized scientists.

This firewall between funding and scientific execution is essential for credibility. The trial will be conducted according to Good Clinical Practice standards, overseen by independent ethics committees at each site and pre-registered in clinical trial databases. Results will be published in peer-reviewed journals regardless of outcome: positive, negative or neutral.

This model of industry support for independent science benefits everyone. The scientific community gains crucial evidence about dietary strategies for diabetes prevention, free from conflicts of interest. Public health authorities receive trustworthy data for policy decisions. The nut industry demonstrates its commitment to evidence-based nutrition science and willingness to let the data speak for itself. And ultimately, consumers and patients benefit from reliable information about whether nuts can truly help prevent diabetes.

Looking Ahead

PRENUT will begin recruiting participants in 2027, with final results expected in 2031. The trial's success depends on sustained participant engagement over three years: a challenge the research team will address through behavioral support programs, regular follow-up and convenient nut delivery.

If PRENUT demonstrates that mixed nuts can prevent or delay type 2 diabetes in high-risk individuals, it will represent a watershed moment for nutrition science and public health. For the first time, we would have definitive evidence that a simple, enjoyable dietary intervention—eating 20 grams of nuts before meals—can address one of the most pressing health challenges of our time.

The diabetes epidemic demands bold, innovative solutions backed by rigorous, independent science. PRENUT is answering that call.

References: 1. GBD 2021 Diabetes Collaborators (2023). Global, regional, and national burden of diabetes from 1990 to 2021, with projections of prevalence to 2050: a systematic analysis for the Global Burden of Disease Study 2021. *Lancet (London, England)*, 402(10397), 203–234. **2.** Gulati, S., et al. (2026). Effects of 24-Week Almond Supplementation on Executive Function and Processing Speed in Middle-Aged Asian Indians with Prediabetes: An Open-Label Randomized Controlled Trial. *J Nutr*, 156(5), 101484. **3.** Ashwini, K., et al. (2025). Effect of Premeal Pistachio Supplementation on Cardiometabolic Risk Factors among Asian Indian Adults with Prediabetes: A Randomized Controlled Trial. *J Nutr*, 155(3), 899–909.



Health Insights

Dietary Guidelines Put Nuts in the Spotlight

Updated dietary guidance from both the Netherlands and the American Heart Association reinforces the role of nuts as a key component of healthy eating patterns. The revised Dutch "Wheel of Five," published by the Netherlands Nutrition Center, increases its recommendation for nuts from 25 to 30 grams per day. Similarly, the 2026 *Dietary Guidance to Improve Cardiovascular Health: A Scientific Statement From the American Heart Association updates* encourages replacing meat with plant protein sources, including nuts, citing evidence linking higher nut consumption to lower risks of cardiovascular disease and all-cause mortality. The guidance also underscores that heart-healthy dietary patterns offer benefits beyond cardiovascular outcomes, including higher intake of dietary fiber—an area where nuts are specifically identified as a valuable source.

Scientific Review Confirms Role of Nuts in Reducing Chronic Disease Risk

Alasalvar, C., et al. (2026).

Nutrients and bioactive compounds in nuts: implications for human health.

Food Chemistry, 523, 149828. Advance online publication.

This comprehensive review reinforces the position of nuts as one of the healthiest foods available, highlighting their exceptional nutritional profile and the growing body of evidence linking regular nut consumption to better health outcomes. The review examines the latest research on tree nuts and peanuts, covering their nutritional composition, bioactive compounds, processing and health benefits.

The unique nutritional profile of nuts is associated with numerous health benefits. The authors also explore how nut polyphenols interact with the gut microbiota, enhancing their bioavailability and supporting mechanisms that may help protect against chronic disease.

Drawing on extensive scientific evidence, the review concludes that regular nut consumption is consistently associated with a lower risk of obesity, hypertension, elevated LDL ("bad") cholesterol, cardiovascular disease—particularly coronary heart disease—and certain cancers. The findings also support the role of nuts in healthy aging, weight management and reducing all-cause mortality, reinforcing recommendations included in dietary guidelines around the world.

The review also highlights that dietary guidelines around the world consistently recommend regular nut consumption as part of a healthy eating pattern. The researchers compiled a detailed summary of nut consumption guidelines from all over the world, representing more than 30 countries in North America, Europe, Asia and the Pacific, Latin America and the Caribbean, Africa and the Near East. The compiled guidelines highlight the benefits of nuts in relation to cardiovascular disease and diabetes, as well as general health.

The review concludes that the unique nutritional composition of nuts supports nutrient adequacy and helps reduce the risk of chronic disease, reinforcing their recognition among the healthiest foods available.

Regular Nut Consumption Linked to Sperm Quality

Dávila-Córdova, E., et al. (2026).

Nut Consumption and Sperm Quality in Healthy Men: Results From the Led-Fertyl Study.

Andrology, e70204. Advance online publication.

In this study, researchers conducted a cross-sectional analysis using data from 222 men between the ages of 18 and 40 years. Men who consumed 7 or more servings of nuts per week had higher total sperm count and concentration compared to those who consumed fewer than 3 servings. Each additional daily serving of nuts was also associated with increases in these parameters. Higher nut intake was further linked to a lower likelihood of abnormal sperm motility and overall semen abnormalities. Substitution modeling showed that replacing nuts with less healthy snack foods, such as potato chips or pastries, was associated with lower total sperm count and concentration. The findings suggest that regular nut consumption may be associated with improved sperm quantity and quality markers in healthy men of reproductive age.



Three Squirrels

ZHANG LIAOYUAN

FOUNDER AND CEO
THREE SQUIRRELS
CHINA

Known as "Squirrel Dad," Zhang Liaoyuan comes from a humble background. He experienced several business failures in his early years before gaining marketing expertise by specializing in the nut industry. In 2012, he founded Three Squirrels, capitalizing on the e-commerce boom and disrupting the traditional nut snack market with a new retail model centered on brand IP. He led the brand's rapid rise to become a leading national snack brand and is an iconic figure in China's internet-based snack industry.

How has the digital-first DNA of Three Squirrels shaped the way you approach the nuts and dried fruit category today?

A digital-first approach has always been the underlying logic guiding our expansion from our core nut and dried fruit categories into a full range of products and channels; it has also profoundly reshaped our market-driven strategy for optimizing our product portfolio.

Firstly, we use digital insights to determine our category strategy. Drawing on years of accumulated online user data, consumer preferences and market feedback, we accurately identify taste preferences, packaging requirements and differences in consumption scenarios for nuts and dried fruits. This information guides the iteration of core products, the streamlining of SKUs and the development of premium product lines.

Secondly, to ensure quality and freshness, we have developed the "Yunzao system," a digital supply chain system that bridges the gap between supply and demand, integrating raw material procurement, factory production and warehouse logistics. This ensures stable supply during major online promotions while also supporting immediate stock availability in offline channels.

Thirdly, we use digitalization to drive synchronized operations across all channels. Through a digital supply chain collaboration platform that integrates production, supply and sales, we provide each channel and product category with a "one product, one chain" supply chain collaboration dashboard. This consolidates production, supply and sales data across every channel, enhancing data transparency at every stage.

Fourthly, we are using digitalization to optimize brand and user operations. Leveraging digital user profiling, we deliver

targeted content and product bundle marketing tailored to different scenarios—such as family gifting, daily snacking and office meal replacements—to build brand awareness.

How do you balance affordability with quality in your product offering?

Pricing and quality are not mutually exclusive; companies can optimize their pricing structures through bulk purchasing, meticulous supply chain management and cost control. Three Squirrels' mission is to make nuts and healthy foods truly accessible to the general public. Therefore, our pricing strategy is not simply about offering the lowest prices, nor is our approach to quality solely about commanding premium prices for high-end products. The core lies in finding a sustainable balance between affordable, consumer-friendly pricing and consistently high standards of quality over the long term.

Upstream in the supply chain, the company continues to advance the direct global sourcing of nuts and dried fruits, alongside the development of four major domestic supply chain hubs, to achieve economies of scale and cost optimization. On the delivery side, the company employs tiered pricing across product categories to balance accessibility with diverse consumer needs, consistently providing high-quality and differentiated products so that people from all walks of life can purchase healthy foods that suit their budgets and quality expectations.

In 2026, Three Squirrels established a "one low, two highs" organizational and operational strategy. The company is further aligning its business development through low costs, high labor efficiency and high quality, shortening decision-making chains and achieving a complete and efficient workflow spanning market insights, category development, channel integration and supply chain delivery.

Your brand makes extensive use of storytelling, including characters and entertainment collaborations. How does this content strategy contribute to long-term brand building?

We aspire to be a national health food brand that is warm, emotional and memorable. Through the creation of IP characters, storytelling and professional collaborations with entertainment agencies, our aim is not merely to engage in marketing, but to establish a lasting brand presence in the minds of consumers using language that young people understand and embrace.

Firstly, we use stories and IP personalities to build up irreplicable brand cultural assets. Through the development of squirrel IP and continuous storytelling, we have transformed Three Squirrels from a product brand into a cultural symbol with character, a sense of companionship and a touch of warmth.

Secondly, we forge deep connections with consumers' daily lives to cultivate brand loyalty. From our early online stores to today's Three Squirrels Lifestyle Stores, we have continuously explored new models and adapted to consumers' diverse situational and emotional needs. By integrating into everyday leisure, family gatherings and light wellness scenarios, we have shifted the focus from one-off purchases to long-term brand identification.

"We have transformed Three Squirrels from a product brand into a cultural symbol with character, a sense of companionship and a touch of warmth."

Thirdly, through collaborative content creation with partner brands, we amplify our brand influence while penetrating new audience segments. We engage in cross-industry collaborations with various brands and IPs; Three Squirrels has made a cameo appearance in the US TV series *The Big Bang Theory* and even gone on a rollercoaster ride with the leading Chinese influencer Stormcrew. The brand has leveraged entertainment traffic to rapidly break through niche boundaries and reach a broader target audience, while maintaining brand engagement at a mass level.

How big a part does social media play in your overall growth strategy?

Social short-form video platforms are not merely channels; they are our category engine. We have established dedicated, ongoing content creation spaces and teams on platforms like TikTok and Xiaohongshu, not for one-off marketing campaigns, but to transform content into a core capability—both operational and product-related. This is particularly crucial for the nut category—short videos are the most efficient way to educate the market, cultivate habits and build brand awareness.

What insights have you gained by being personally present on social media and sharing content—such as your shop visits and observations on how nuts are presented in different markets?

In my short videos, I have shared numerous observations on China's offline retail market—ranging from chain supermarkets in tier-one cities to family-run shops in lower-tier markets, and from emerging on-demand retail to Three Squirrels' full-range private-label lifestyle stores. For me, this is about stepping beyond office data and preconceived notions to immerse myself in the reality of shop shelves and getting close to real-life consumption scenarios. This has also allowed me to distill four key insights regarding the transformation of offline channels for nuts and dried fruits.

Firstly, the logic of product display is shifting from categorization by product type to a restructuring based on lifestyle scenarios. Traditional channels tend to concentrate nuts and dried fruits on a single shelf, whereas an increasing number of retail outlets are now breaking down category boundaries. They are creating dedicated display zones centered on real-life scenarios, combining nuts and dried fruits with beverages and health supplements to create scene-based combinations.

Secondly, the nature of displays has shifted from static presentation to dynamic experience. The Chinese snack market is currently experiencing a wave of freshness, and the core value of offline channels has shifted from mere convenience of purchase to the perception of freshness, in-store experience and consumer trust.

Thirdly, product displays are shifting from single-category to "nuts plus" cross-category integration. Nuts and dried fruits are no longer merely standalone snacks; they are becoming foundational complementary categories within the food industry. They naturally integrate with and complement formats such as fresh fruit, tea shops and meal replacement products, facilitating cross-traffic and associated purchases.

Fourthly, retail strategies are shifting from a nationwide standardized approach to region-specific adaptation. China is a vast country with significant differences in consumer preferences across regions. Nut brands cannot apply a single set of standards nationwide; instead, they must tailor their product range and in-store displays based on regional tastes and consumer habits.

How do you approach product presentation as part of the overall consumer experience?

In our view, the visual appeal of a product and its packaging design are never merely about outward appearance; rather, they are deeply integrated into the entire consumer journey—from recognition and selection to decision-making, usage and social sharing.

We use packaging visuals to clearly distinguish between categories and quality tiers, creating three core series: Authentic Value, Authentic Freshness and Authentic Quality. At the same time, we have innovatively introduced ABCDE visual grading for ingredient list purity, where Grade A represents all-natural ingredients with no unnecessary additives. In short, our packaging is not merely a container but an intuitive and easy-to-understand quality manual.

Moreover, we have crafted product visuals and packaging design into social currency that young people are eager to share voluntarily. Products that are attractive, meaningful and offer excellent value naturally encourage users to take photos, share them and give them as gifts. This extends the product's presence from the shop shelf to social settings, fostering organic word-of-mouth and elevating the brand experience from mere personal consumption to a level of emotional and social value.

Consumer interest in healthy snacking continues to grow. How is this trend shaping your approach to nuts and dried fruit products?

We predict that consumer demand for healthy snacks will center on fresh, made-to-order products with short shelf lives to preserve freshness. Here, "freshness" refers not only to the freshness of the raw ingredients themselves, but to freshness throughout the entire supply chain—from processing at source and warehousing to end-consumer consumption. For example, leveraging our nationwide supply chain network, Three Squirrels has launched products such as the "7-Day Fresh" daily nut mix and the Gold Edition series of tinned nuts online, ensuring that products reach consumers within seven days of production.

Offline, through our Three Squirrels Lifestyle Stores, we have introduced a range of freshly roasted and prepared nut products, allowing consumers to purchase nuts that are roasted and prepared on the spot.

We are currently advancing the "Nuts in Everything" initiative and expanding the "nuts plus" category. We no longer limit ourselves to the simple sale of nuts and dried fruits, but instead delve deeply into the natural health benefits of nuts, integrating them into diverse consumption scenarios such as pastries, meal replacements and flavored snacks, to drive cross-category product innovation.

Where do you see the greatest opportunities for innovation within the nuts and dried fruit category?

Firstly, in-depth research and development of functional nuts tailored to specific demographics. This involves developing targeted formulations, precise nutrition and customized functional products to address the specific health needs of different groups, such as children, the middle-aged and elderly, and those in sub-optimal health. Innovation through segmentation based on demographic, physical constitution and daily routines represents the most crucial avenue for enhancing the added value of the nut category and breaking free from homogenized price competition.

Secondly, innovation in the eating experience and the deep exploration of emotional lifestyle value. By addressing minor pain points in consumer usage scenarios—such as difficulty in shelling or damage to fingernails—technological innovation can be used to enhance the experience of consumption. We are breaking the perception that nuts are merely a snack, extending their use to diverse scenarios such as meal accompaniments, sports nutrition, office meal replacements and daily family life.

How are you strengthening your supply chain capabilities in the nuts and dried fruits category?

On the raw materials front, we have established a dual-track model combining direct global sourcing of premium ingredients with deep engagement in domestic production areas. Our raw materials now originate from over 18 countries and regions worldwide. Internationally, the company has established direct partnerships with globally renowned farms and leading enterprises. Domestically, we have focused on key production regions with natural advantages, such as Yunnan, Guangxi and Xinjiang. We have established production facilities in Longzhou (Guangxi), Yongde (Yunnan) and Dongfeng (Jilin), enabling localized procurement and initial processing.

In terms of manufacturing, our four major supply chain hubs cover the in-house production of core nut products as well as key snack categories, operating as integrated facilities that combine production, testing, logistics, R&D and comprehensive services. This regionalized supply chain base layout significantly enhances local fulfilment response times, optimizes warehousing, trunk transport and turnover efficiency, and achieves cost reductions through economies of scale. It also better supports the rapid launch of short-shelf-life fresh, scenario-specific and differentiated nut products.



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INC international Nut&DriedFruit

Thank You for Joining Us in Macao

A huge thank you to everyone who joined us for the 43rd INC World Nut and Dried Fruit Congress and helped make this year's event such a memorable success. More than 1,300 industry leaders from 65 countries came together in Macao for three inspiring days of networking, business, innovation and discussions that helped shape the future of the global nut and dried fruit industry.



From May 12-14, 2026, Macao became the beating heart of the global nut and dried fruit industry. Together, we explored the trends, challenges and opportunities driving our sector forward, reaffirming the INC Congress as the leading global platform where our industry comes together to connect, collaborate and set the agenda for the future.

Expert-Led Round Tables

Product-specific round tables led by industry experts provided actionable insights for people in the nut and dried fruit business. Early forecasts discussed during the round tables indicate that global 2026/2027 tree nut production is projected to remain stable at six million metric tons. Almonds (+3%) lead production; walnuts are expected to remain steady (+0.15%); hazelnuts to expand (+39%), and cashews to slightly decline (-3%). Due to the off-year, pistachios are expected to drop 36%. Significant growth is expected for Brazil nuts (+81%) and pine nuts (+63%). Peanuts are expected to decline slightly by 6%. Dried fruit production is projected to rise 11%, driven by gains in raisins (+22%) and a 52% rebound in apricots. Aside from weather disruptions, key challenges include shipping disruptions and rising costs due to the geopolitical situation, tariffs and other trade barriers. For a more detailed look at the information shared during the round tables, turn to our Global Crop Update & Outlook on p. 73.

Illustrious Guest Speakers

Other key moments included keynote talks by Brandy Niu, Vice President of JD.com and President of JD Retail FMCG, who spoke about future opportunities in China's snack industry, and Jason Fu, Chief AI Expert for the Consumer Industry at Feishu, who discussed how AI is ushering in a new era for the enterprise digital workforce. The Nutrition Research Seminar featured Prof. Jordi Salas-Salvadó, Chairman of the INC World Forum for Nutrition Research & Dissemination, Prof. Cyril Kendall from the University of Toronto in Canada and Prof. Alison Coates from Adelaide University in Australia, who shared scientific evidence supporting the benefits of nuts and dried fruit in diabetes prevention and weight management.

INC Awards

The annual INC Awards once again celebrated outstanding achievements and placed an international spotlight on the industry's most forward-thinking projects. Categories included gastronomy, research, innovation and sustainability. In addition, special lifetime achievement awards honored individuals for their enduring contributions to the sector, while the industry's highest distinction—the Golden Nut Award—was presented to three deserving recipients.

Read on to revisit key sessions, browse our photos and relive some of the best moments from Macao.

Inside the INC Committees Shaping the Industry Agenda in Macao



INC Ambassadors Committee

Executive Committee

The Executive Committee approved key governance and financial matters, including the Q1 2026 financial report and revised 2026 budget. Members discussed location proposals and plans for future INC Congresses, the INC Sustainability Certification and INC-funded health research (NUTPOOL and PRENUT studies), and were briefed on the INC's multi-country dissemination campaigns, pavilions, INC Academia, and the INC digital and communications plan. Winners of the 2026 INC Innovation Award and INC Award for Excellence in Sustainability were ratified based on peer reviews from the evaluation committees.

Board of Trustees

After discussing the business implications of current geopolitical developments, the Board ratified INC Ambassador nominations and approved the 2025 end-of-year audited accounts and the 2026 budget. The Board was also presented with an update on key activities and plans for future congresses. Members also received reports from all subcommittees on key strategic and operational activities.

Business Integrity Committee

The Business Integrity Committee, chaired by Giles Hacking, reviewed membership developments for the 2025/2026 cycle, including new members, congress attendees and membership retention trends, and reviewed administrative matters related to membership procedures and governance.

Sustainability Institute Committee

Chaired by Bill Carriere, this committee reviewed key initiatives of the INC Sustainability Institute, including the Sustainability Certification program, auditing partnerships, and dissemination through webinars and the INC Academia. It also covered the development of the online Data Hub, financial services initiatives, the INC Sustainability Awards, and the INC's work with UNECE on food loss and waste prevention.

Scientific and Government Affairs Committee

The Scientific and Government Affairs Committee, led by Julie Adams, discussed supply chains and shipping issues, as well as tariffs, trade and market access. The Committee was also briefed on the INC's activities during the previous semester, including participation in Codex Alimentarius and UNECE working groups, and key issues of interest to the industry, including nickel MLs in hazelnuts, SO_2 in dried apricots, ochratoxin A in dried figs and RASFF alerts.

Statistics Committee

The Statistics Committee, chaired by Roby Danon, reviewed INC statistical resources, publications and data submission timelines, emphasizing the need to keep industry statistics under regular review as new information becomes available, and highlighting the dynamic nature of the statistical database. Members discussed crop forecasting methodologies, marketing year calendars across hemispheres and preliminary workforce estimates. The INC also invited committee members to support efforts to expand data sources and strengthen statistical coverage.

Ambassadors Committee

Chaired by José Eduardo Camargo, the Ambassadors Committee reviewed INC membership developments, strategic objectives for 2027, ambassadors' role in supporting membership growth, and sustainability initiatives. Participants discussed strengthening collaboration across countries through regular meetings and sharing best practices. The session highlighted INC priorities, including the Sustainability Certification, health claim initiatives, and promoting consumption through dietary guidelines.

World Forum for Nutrition Research and Dissemination

Chaired by Prof. Jordi Salas-Salvadó, this committee reviewed progress on the NUTPOOL study and plans for the INC-funded PRENUT clinical trial, discussed publication plans for the NUTS 2025 white paper, recommended a candidate for the 2027 INC Excellence in Research Award, proposed a new committee member, and considered strategies to improve research visibility.

Academic Committee

The Academic Committee, chaired by Lalo Medina, reviewed enrollment trends, participant feedback, ongoing content development, and the enhancement of courses through new visual formats within the INC Academia. The Committee explored opportunities for new courses in technological innovation, sustainability certification, carbon farming, quality and safety in logistics, and the upcycling of byproducts for food and nutraceutical applications.

China Immersive Industry Experience 2026

Just ahead of the INC Congress in Macao, an intrepid group of 35 participants from 19 countries took a deep dive into China's nut and dried fruit industry through the INC's China Immersive Industry Experience, gaining firsthand insights into the country's rapidly evolving snack sector.

The program kicked off with a visit to Chacha Food in Hefei. The first stop was the company's state-of-the-art vertical automated express warehouse, a breathtaking engineering marvel that showcased the scale and sophistication of Chacha's logistics operations. Participants gained insight into the company's entire process, from processing to shipping.

The group then toured the production facility where Chacha's iconic "Daily Nuts" products are packed. Attendees were particularly impressed by the advanced machinery and rigorous safety standards in place throughout the operation.

Afterwards, the group visited Chacha's Culture Hall, where participants explored the company's history and development. Exhibits showcasing products for both domestic and international markets provided a comprehensive overview of Chacha's position within the nut and dried fruit industry.

The visit continued with a presentation from the Chacha team, followed by an engaging Q&A session. Company representatives shared insights into the remarkable success of the "Daily Nuts" product line, as well as Chacha's approach to product development and packaging innovation.

After a hearty buffet lunch, participants visited one of Chacha's pecan orchards, where wheat was being cultivated between the tree rows as part of an intercropping system. The tour highlighted innovative agricultural practices aimed at improving environmental sustainability, and included a demonstration of a state-of-the-art robotic spraying system.

The journey then continued to Wuhu, where participants visited the headquarters of Three Squirrels the following day. During the visit, they toured the company's supermarket outlet and live-streaming studio, gaining insight into its retail and digital marketing operations. The group also experienced the Three Squirrels theme park, located adjacent to the headquarters, which showcased the company's creative approach to branding, customer engagement and building a distinctive consumer experience.

In addition, participants took part in a round-table discussion with Three Squirrels representatives, providing a



Chacha's vertical automatic express warehouse.



Chacha's "Daily Nuts" workshop.



Chacha Culture Hall.



Chacha round table.

valuable opportunity to ask questions and engage in an open exchange on the company's business strategy, operations, market positioning and future growth plans. The discussion also offered insights into key trends and developments within the company's nut business and broader commercial activities.

After lunch, the group visited a Three Squirrels processing plant and distribution center, gaining firsthand insight into the company's large-scale manufacturing and logistics operations. The delegation toured processing facilities where they observed various stages of production, from sorting and roasting to final product testing and packaging for products such as macadamias and pecans. The visit provided a comprehensive overview of the company's integrated approach to processing, quality assurance and distribution.

After a night in Nanjing, the group flew to Hong Kong, where they were treated to an extraordinary visit to the Port of Hong Kong, one of the world's busiest container ports.



Chacha pecan farm.



Three Squirrels headquarters.



Three Squirrels round table.



Three Squirrels supermarket outlet.



Three Squirrels theme park.



Three Squirrels live-streaming studio.



Port of Hong Kong.

Looking Forward in Today's Rapidly Changing World

Amid rapid change in consumer behavior and technology, the keynote addresses at the INC Congress highlighted two forces shaping the industry's future: data-driven retail innovation in China's FMCG sector and the growing impact of AI on enterprise transformation.

BRANDY NIU

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

Brandy Niu highlighted how China's rapidly evolving market for snacks—particularly nuts and dried fruit—is being reshaped by health-driven consumption, omnichannel retail and data-led innovation.

She traced how JD evolved into China's largest retailer by revenue, serving over 700 million annual active users, and emphasized its FMCG division's role in partnering with brands to unlock category growth. In nuts and dried fruit, she described a major shift over the past 40 years: from bulk and seasonal gift consumption to packaged, branded and now daily nutrition-oriented products sold across integrated online and offline channels.

Three key consumer trends are reshaping demand. First is health consciousness, with sharp growth in search terms such as "no additives," "sugar-free" and "low-GI." Second is the move toward daily consumption, including use of nuts and dried fruits as ingredients in baking, snacks and lifestyle occasions. Third is product and brand innovation, especially IP-driven marketing that resonates with younger consumers.

Niu showcased how JD uses big data to identify demand signals and co-develop SKUs with brands. Examples included "plain nuts" products responding to clean-label demand and Brazil nuts positioned around selenium content, which significantly boosted category growth and search interest.

She concluded that JD's role is to enable partners to turn consumer insights into scalable products, strengthening both innovation success rates and long-term category growth in China's highly competitive FMCG landscape.



Jason Fu.

JASON FU

Chief AI Expert for the Consumer Industry at Feishu, China

Jason Fu argued that AI is rapidly redefining enterprise operations beyond productivity tools, becoming an active "digital employee" embedded across decision-making and execution.

He outlined a shift from early chat-based AI to systems that execute tasks, generate content and participate directly in workflows. For nut and dried fruit sector, Fu highlighted AI's potential as a "super scout" that continuously aggregates external signals such as climate risks, logistics disruptions and consumer demand trends to support faster, more informed decisions.

Fu also presented "taste radar" applications that track changing consumer preferences through e-commerce data, offering potential relevance for identifying emerging demand in healthier snacking, specific product presentations and value-added formats.

At the enterprise level, he emphasized AI-driven automation of meeting summaries, reporting and knowledge sharing, which can significantly reduce information bottlenecks in large organizations and improve decision speed. He also described emerging "digital employees" that can increasingly handle routine analysis and reporting tasks.

However, Fu stressed that AI does not replace human judgment. Strategic decisions, especially those involving trade-offs and contextual understanding, remain human responsibilities, while AI strengthens execution and information processing.

He concluded that organizations are shifting toward AI-integrated workflows, where value increasingly depends on how effectively companies redesign processes and manage knowledge alongside AI systems.

Building the Scientific Evidence for Nuts and Dried Fruits

Chaired by Prof. Jordi Salas-Salvadó, the Nutrition Research Seminar brought together leading experts to explore the latest evidence on the role of nuts and dried fruits in weight management, diabetes prevention and the reduction of chronic disease risk.



PROF. JORDI SALAS-SALVADÓ

Chairman of the INC World Forum for Nutrition Research and Dissemination



PROF. ALISON COATES

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



PROF. CYRIL KENDALL

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

Prof. Alison Coates gave an overview of the evidence linking nuts and dried fruit to healthy weight management. Against the backdrop of rising global obesity rates, she emphasized that regular nut consumption does not contribute to weight gain despite nuts being energy-dense foods. Drawing on recent systematic reviews and meta-analyses, she highlighted evidence linking nut consumption to lower body weight, reduced waist circumference and lower hunger ratings. Factors such as the lower metabolizable energy of nuts and their satiating properties may help explain these findings. Prof. Coates also reviewed emerging research on dried fruit, highlighting evidence that dried fruit consumers tend to have lower body weight and better diet quality, while research on prunes suggests potential benefits for satiety and body composition. She concluded that both nuts and dried fruit play an important role in healthy dietary patterns and may offer valuable nutritional support, particularly for people with lower energy intakes due to the use of GLP-1 medications.

Prof. Cyril Kendall provided an update on the science linking nuts to diabetes prevention and management. He reviewed evidence showing that nuts improve markers of glycemic control, including HbA1c and fasting blood glucose, and described how replacing carbohydrates with nuts can help reduce post-meal blood glucose responses. Looking ahead, Prof. Kendall presented the PRENUT study, a major multinational clinical trial funded by the INC that will investigate whether consuming mixed nuts before meals can prevent the progression from prediabetes to type 2 diabetes. The study—described in greater detail on page 38 of this magazine—is poised to generate the high-quality evidence needed to support future health claims and dietary recommendations.

Prof. Salas-Salvadó rounded out the session by sharing highlights from the NUTS 2025 international conference and presenting preliminary findings from the INC-funded NUTPOOL project, which is bringing together data from 27 cohort studies and nearly one million participants worldwide. Early analyses indicate that higher nut consumption is associated with lower risks of cardiovascular disease, diabetes, cardiovascular mortality and all-cause mortality. These findings reinforce the growing scientific consensus that nuts may play an important role in the prevention of non-communicable diseases.

The seminar demonstrated both the strength of the current evidence base and the importance of continued investment in nutrition research. Through initiatives such as PRENUT and NUTPOOL, the INC continues to support research that advances public health while strengthening the future of the global nut and dried fruit sector.

> *"Evidence shows that nuts play an important role in healthy dietary patterns without contributing to weight gain, while also supporting diabetes prevention and overall health."*

Safer, Smarter, Stronger: Industry Advancement in Focus

The 2026 INC Congress featured sponsored panel sessions focused on strengthening food safety, traceability and quality control across the nut and dried fruit value chain. From advanced pasteurization and AI-driven sorting technologies to data platforms supporting industry-wide transparency, the sessions highlighted how integrated systems are improving consistency, efficiency and trust from production to export.



Photo: Laitram Machinery.



Photo: Raisins South Africa.



Photo: Anysort.

LAITRAM MACHINERY

Laitram presented an advanced approach to nut pasteurization using CoolSteam® technology—a continuous, low-temperature, forced-convection, moisture-neutral process that eliminates pathogens while preserving taste, texture and appearance. The presentation emphasized that effective 5-log pasteurization targeting pathogens such as *Salmonella*, *E. coli* and *Listeria* on tree nut surfaces depends on more than applying steam alone: not all steam processes deliver the same balance of lethality, efficiency and product quality. Operating in a "Goldilocks" zone between slower low-temperature methods and more aggressive high-temperature approaches, CoolSteam is designed to provide a moisture-neutral process while helping preserve the natural appearance, flavor, texture and crunch of multiple validated types of tree nuts. The system is available in a pasteurization-only configuration and an integrated version that adds brining and precision roasting through a continuous Intraflow briner. It supports multiple nut types with adjustable recipes, automated critical control points, reduced material handling, rapid cooling to packaging-ready temperatures, and global Laitram service and support.

RAISINS SOUTH AFRICA

The session by Raisins South Africa focused on food safety, traceability and residue management as key priorities within the global raisin value chain. The panel discussed the increasing global demand for safe, traceable dried fruit and the shared responsibility of stakeholders to build trust throughout the supply chain. Strong emphasis was placed on South Africa's well-structured production system, which has supported significant growth in raisin output while consistently upholding high quality standards. The integrated value chain enables efficient operations, consistent product quality and reliable supply to international markets. Comprehensive traceability systems were highlighted, demonstrating the industry's ability to track raisins from the farm through to the export container. The session reinforced the importance of transparency, accountability and continuous improvement in maintaining buyer confidence and strengthening South Africa's reputation as a trusted supplier of premium-quality raisins to global markets.

ANYSORT

Anysort is a world-leading provider of intelligent sorting solutions guided by the vision "Let the whole world enjoy the best quality food" and the concept "Everything can be sorted." Focused on fast-growing nut industry and food safety demands, Anysort presented its Jiexun Cloud-Controlled AI Intelligent Production Line Solutions. Powered by six core technologies, including the PLOV 3.0 platform, it delivers high-precision, low-breakage, high-yield sorting—removing defects and contaminants to ensure zero food safety risks. The solution addresses key industry challenges including aflatoxin control, rising labor costs, quality consistency and production automation. Anysort showcased a portfolio of AI-powered equipment, including the MK and TK Series sorter for fragile nuts, the AI X-ray machine for density-based sorting, the RX-V AI flagship system combining X-ray and visual inspection, and the HPRO UV AI flagship for detecting toxin-contaminated kernels. A real-time quality analyzer and cloud-control platform enable continuous monitoring, data-driven optimization, and automated closed-loop production management.

INC Awards Celebrate Excellence Across the Industry

The INC Awards recognized outstanding achievements across multiple categories, celebrating innovation, leadership and excellence while shining an international spotlight on the industry's most forward-looking projects.

Honorary
Golden Nut Award
CAO DERONG



Corporate
Golden Nut Award
THREE SQUIRRELS



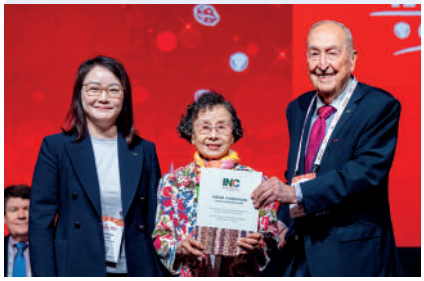
Corporate
Golden Nut Award
CHACHA FOOD



Lifetime
Achievement Award
CHENG HUNG KAY



Lifetime
Achievement Award
WENG YANGYANG



Scan the QR code
for further details
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INC Award winners!

Excellence in
Research Award
PROF. CYRIL KENDALL



Excellence in
Gastronomy Award
CHEF JACK LIN



Excellence in Sustainability
Award – Back to the Planet
OFI



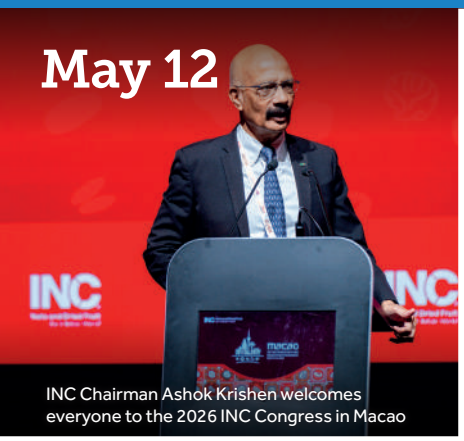
Excellence in Sustainability
Award – Back to the People
OCEAN SPRAY



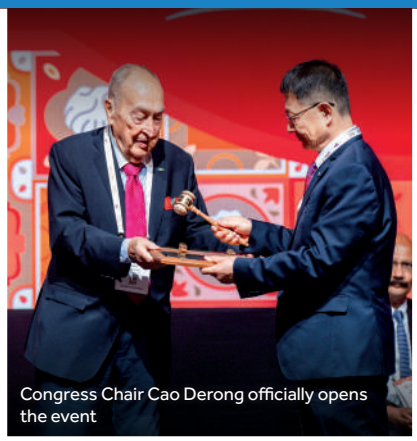
Innovation Award
WHITWORTHS LIMITED



May 12



INC Chairman Ashok Krishen welcomes everyone to the 2026 INC Congress in Macao



Congress Chair Cao Derong officially opens the event







All-Day Coffee sponsored by Almond Board of California





Working Buffet Lunch sponsored by Three Squirrels









Welcome Cocktail sponsored by Chacha Food



May 13







All-Day Coffee sponsored by Blue Diamond Almonds



Working Buffet Lunch sponsored by Setton Pistachios of Terra Bella



Meeting Area sponsored by Al Jameel International











Casual Buffet Dinner sponsored by Wonderful Pistachios & Almonds

May 14



All-Day Coffee sponsored by Rainbow Nut Co., Ltd.



Working Buffet Lunch sponsored by Dorado FZCO





Gala Dinner sponsored by Chilenut











The Organizing Committee looks forward to welcoming you to Rio de Janeiro in 2027

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Membership Milestone: Passing the 1,000 Mark

Crossing the 1,000-member threshold marks a landmark moment in the INC's history. Built through decades of steady growth, the organization now connects professionals from 88 countries across every continent. This milestone reflects both the enduring value of the INC and the strength of the global community it serves.

Reaching this milestone is a testament to the support and engagement of our members, whose participation has helped strengthen the INC's role as a global forum for collaboration, knowledge sharing and industry advancement. Over more than four decades, the organization has evolved into a truly international network spanning the entire global nut and dried fruit industry.

The INC's 1,000th member is **Jin Hua Mellow Taste Trade Co., Ltd.** of China. Founded in 2008, the company is a leading importer and processor of almonds, pecans, macadamias and other nuts. Its addition reflects the growing diversity and global reach of the INC community.

Becoming the INC's 1,000th member is a moment of great pride for Jin Hua Mellow Taste. The company values the many benefits of INC membership, including first-hand global nut industry data, market forecasts and international food safety updates; access to the INC's global network of trusted producers, suppliers and distributors; and its industry events and publications. "We sincerely appreciate INC's professional platform and resource empowerment," commented General Manager Yoyo Yao. "We look forward to actively participating in INC industry exchanges, cooperating with global member enterprises to promote the healthy and high-quality development of the international nut industry, and delivering safe, high-quality nut products and trade services to global partners."

While surpassing 1,000 members is an important accomplishment, it is also a reminder of the opportunities ahead. The INC remains committed to supporting members and fostering connections across the industry for years to come.

INC Membership Today: More Than 1,000 Companies in 88 Countries



GET CERTIFIED



INC Sustainability Certification

The trusted mark of sustainability in the nut and dried fruit industry.





INC® Nuts and Dried Fruit *for a Better World*

The INC Sustainability Certification: Why It Should Be Part of Your Business Strategy

As sustainability becomes an increasingly important driver of business success, the INC Sustainability Certification should be part of every company's business strategy. Independent verification is becoming increasingly important as customers, business partners and stakeholders look for credible evidence of sustainability performance. The INC Sustainability Certification provides companies with a trusted way to demonstrate leadership, strengthen credibility, build trust and differentiate themselves in an increasingly competitive marketplace.

What sets the INC Sustainability Certification apart is that it is the only sustainability certification designed specifically for the nut and dried fruit industry. It has been developed to meet the needs of the entire supply chain, covering growers, processors and manufacturers, and global trade specialists. By addressing the specific sustainability challenges of the sector, the certification provides a practical framework for companies to drive meaningful sustainability progress while supporting the long-term growth of the industry.

One of the program's greatest strengths is that it builds on work many companies have already completed. Rather than asking businesses to start again, the INC Sustainability Certification recognizes existing sustainability efforts and gives credit to companies that are already certified under relevant **ISOs, SMETA and Global G.A.P.** This significantly reduces duplication, allowing companies to gain recognition for the sustainability practices and certifications they already have in place while potentially shortening the audit process, saving both time and money.

The independent third-party audit has been designed to be practical and straightforward. Much of the assessment focuses on reviewing existing documentation, policies and certifications, with companies often finding they are more prepared than they initially expected. Businesses that organize their documentation in advance can complete the process more efficiently while demonstrating that their sustainability and ESG commitments are supported by credible, independently verified evidence.

Unlike traditional certification programs, the INC Sustainability Certification is based on continuous improvement rather than a simple pass-or-fail assessment. Companies receive a one-, two- or three-star rating that recognizes their current level of sustainability performance while providing a clear pathway for ongoing progress. Certified businesses also receive a certification stamp, giving customers confidence that the company's practices have been independently verified.

The business benefits extend well beyond the audit itself. As sustainability becomes an increasingly important factor in purchasing decisions, independently verified certification can strengthen customer confidence, improve market access and provide a valuable competitive advantage. For the next generation of consumers, sustainability is no longer simply an expectation—it is becoming a key differentiator.

The INC Sustainability Certification is more than a sustainability assessment. It is a practical business tool that recognizes existing achievements, encourages continuous improvement and provides companies with a credible way to demonstrate leadership. As sustainability expectations continue to grow across global supply chains, making the INC Sustainability Certification part of your business strategy is an investment in both your business and the future of the nut and dried fruit industry.

> *"The INC Sustainability Certification has been developed for growers, processors and manufacturers, and global trade specialists."*

INC Sustainability Certification Webinars

The INC is organizing a series of three webinars—covering the Americas, EMEA and Asia-Pacific—that explore how the INC Sustainability Certification can help companies strengthen credibility, build trust and gain a competitive advantage in an increasingly sustainability-focused marketplace. Independent auditors and early participants will provide valuable perspectives on the certification journey and what it takes to achieve verified sustainability recognition.

Watch your email inbox for further information about how to sign up!

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Southeast Asia: A Strategic Growth Opportunity for the Nut and Dried Fruit Industry

As part of its mission to increase global consumption, the INC has identified Southeast Asia as a priority market for future growth. The region is home to approximately 185 million Gen Z consumers—representing nearly 30% of the population—with Indonesia, the Philippines, Thailand and Viet Nam accounting for the largest concentration of this demographic. Recognizing the significant potential of these markets, the INC is expanding its multi-country consumer campaign across all four countries to drive awareness, engagement and consumption of nuts and dried fruit.

To better understand consumer behavior and identify opportunities to unlock growth, the INC conducted extensive consumer research with Ogilvy across these markets. The findings provide valuable insights into consumption habits, purchasing behaviors and opportunities to increase demand.

Consumption Trends Reveal Distinct Market Opportunities

The findings show that nuts and dried fruit already form part of the regular diet of many Southeast Asian consumers. Peanuts are the clear category leader, with nearly 85% of consumers eating them at least monthly and 26% consuming them daily.

Among dried fruit, raisins are the most frequently consumed product, with 68% of consumers eating them monthly or more often. Dates follow at 50%, demonstrating strong demand across the region.

Although broad consumption trends are consistent across Southeast Asia, important differences emerge between countries. Viet Nam stands out as the most diverse nut market, with strong consumption across a wide range of nut categories, including peanuts (88%), cashews (76%), almonds (72%) and pistachios (60%). Indonesia shows particularly strong demand for dates, with 67% of consumers consuming them monthly or more often, while Thailand records the highest consumption of dried cranberries at 55%.

Consumption Frequency of Nuts Among Gen Z, %

	TOTAL (Consume daily+weekly+monthly)	INDONESIA	PHILIPPINES	THAILAND	VIET NAM
Peanuts	85	80	90	82	88
Almonds	69	61	72	73	72
Cashews	64	56	57	70	76
Walnuts	49	28	55	48	69
Pistachios	45	30	51	43	60
Hazelnuts	43	43	53	45	29
Macadamia nuts	37	19	31	50	52
Pecans	29	28	27	36	26
Pine nuts	23	15	24	30	23
Brazil nuts	21	14	21	31	19

Consumption Frequency of Dried Fruit Among Gen Z, %

	TOTAL (Consume daily+weekly+monthly)	INDONESIA	PHILIPPINES	THAILAND	VIET NAM
Raisins	68	61	66	70	74
Dates	50	67	49	52	30
Dried cranberries	45	34	45	55	44
Prunes	41	24	46	49	45
Dried apricots	35	32	32	39	36
Dried figs	28	28	28	32	25

Taste Preferences Offer Product Development Opportunities

The research also highlights important differences in product preferences across the region. Overall, roasted (52%) and salted nuts (47%) are the most popular formats. Viet Nam stands apart, however, with consumers showing the strongest preference for natural/raw nuts (54%) and flavored nuts (55%).

For dried fruit, flavored products are the preferred choice overall, led by Viet Nam (79%) and the Philippines (68%). In contrast, consumers in Indonesia (56%) and Thailand (53%) show a stronger preference for dusted dried fruit. These differences highlight the importance of tailoring product offerings and marketing strategies to local tastes.

"Consumer preferences highlight the importance of convenience."

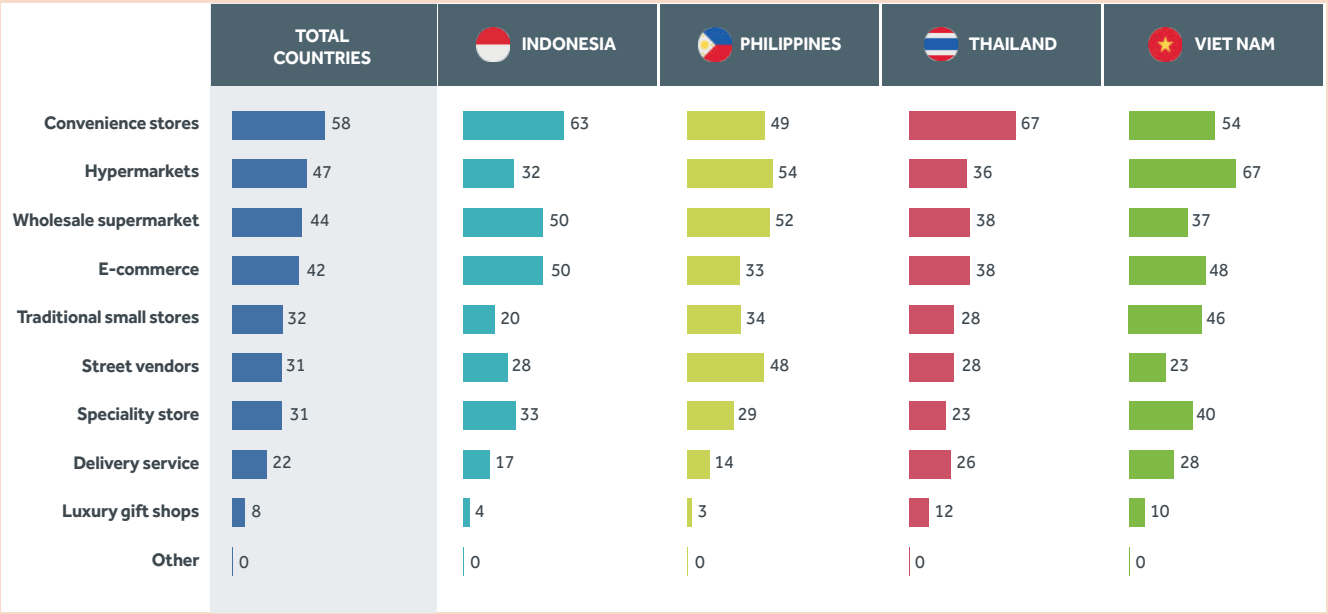
Convenience Drives Consumption

Gen Z is already playing a significant role in household purchasing decisions for nuts and dried fruit across Southeast Asia. Thailand and Viet Nam lead the way, with 89% and 81% of Gen Z consumers respectively identifying themselves as the primary decision-makers, while the Philippines and Indonesia record a still substantial 74% and 68%, respectively.

Convenience is a key driver of consumption across the region. Overall, 58% of consumers purchase nuts and dried fruit through convenience stores, making them the most important retail channel. Hypermarkets also remain highly relevant, while e-commerce continues to grow in importance, reaching 42% of consumers.

Consumer preferences further highlight the importance of convenience. Individual-sized packs are particularly popular among younger consumers, reflecting demand for portable, easy-to-carry snacks that fit seamlessly into busy, on-the-go lifestyles.

Place of Purchase of Nuts and Dried Fruit Among Gen Z, %



Expanding Consumption Occasions

Nuts and dried fruit are most commonly consumed as ingredients in chocolates and nougats, selected by 52% of consumers. Trail mixes follow at 44%, while ice cream (39%) and beverages (30%) are also popular applications. Viet Nam stands out from the regional trend, with trail mixes emerging as the leading format. These findings suggest opportunities to further expand the use of nuts and dried fruit in everyday snacks, meals and healthier food applications.

"The findings suggest opportunities to further expand the use of nuts and dried fruit in everyday snacks, meals and healthier food applications."

Products With Nuts and Dried Fruit Consumed Among Gen Z, %

	TOTAL COUNTRIES	INDONESIA	PHILIPPINES	THAILAND	VIET NAM
Chocolates, nougats, etc.	52	57	63	41	45
Trail mix	44	26	30	59	65
Ice cream	39	42	48	38	26
Drinks	30	39	25	26	30
Ingredients for sweet recipes	28	26	34	31	21
Bars	27	16	42	22	26
Granola	25	24	28	33	15
Ingredients for savoury recipes	22	30	26	18	15
Spreads/Creams	21	31	25	14	15
Flours/Powders	12	15	10	10	13
In beauty or hygiene products	11	10	11	14	10
Other	0	0	0	0	0
I don't eat them in any of these versions	3	3	2	4	2

A Key Opportunity for Health Positioning

One of the most significant findings relates to how consumers perceive healthy snacks.

Fresh fruit is the leading daily snack choice among Gen Z consumers, consumed by 62% of respondents. In comparison, nuts are consumed daily by 35% of consumers and dried fruit by 25%.

The research suggests that nuts are not yet strongly associated with protein despite their nutritional benefits, while dried fruit often competes directly with fresh fruit in consumers' minds. This presents a valuable opportunity for the industry to strengthen communication around the protein content of nuts and the vitamin, mineral and fiber benefits of dried fruit.

Snacks Consumed Daily Among Gen Z, %

	TOTAL	INDONESIA	PHILIPPINES	THAILAND	VIET NAM
Fresh fruit	62	62	60	58	67
Protein (eggs, ham, tuna, etc.)	48	54	62	41	35
Yoghurt and/or dairy products	46	38	31	53	63
Savory processed snacks (chips, crisps, biscuits, etc.)	43	46	38	51	37
Pastries/baked goods/cakes/local desserts	42	36	50	41	40
Sweet processed snacks (biscuits, sweets, chocolates, etc.)	41	36	44	45	39
Vegetables	39	44	42	35	35
Nuts (almonds, pistachios, walnuts, etc.)	35	28	37	41	35
Sandwiches and rolls/savoury stuffed breads	35	27	46	31	36
Ice cream	28	23	22	41	25
Cereals	28	20	26	29	36
Dried fruit (dried figs, raisins, dates, etc.)	25	15	21	30	33
Energy drinks	18	17	14	22	21
Protein bars	17	13	20	19	17
Other	0	0	0	0	0
I don't eat food between meals	2	2	1	3	1

Turning Insights into Action

The INC is already applying these insights through its Southeast Asia consumer campaign: *Snack Off*.

Inspired by popular cooking and entertainment formats, the campaign brings together local creators and personalities to demonstrate how nuts and dried fruit can be incorporated into everyday meals, snacks and lifestyles. Through engaging video content, recipes, challenges and social media activations, *Snack Off* showcases the versatility, convenience and nutritional benefits of nuts and dried fruit in a way that resonates with modern consumers.

Running across Indonesia, the Philippines, Thailand and Viet Nam, the campaign has been specifically designed to engage Gen Z audiences while remaining relevant and appealing across generations.

> *"The INC is already applying these insights through its Southeast Asia consumer campaign: Snack Off."*



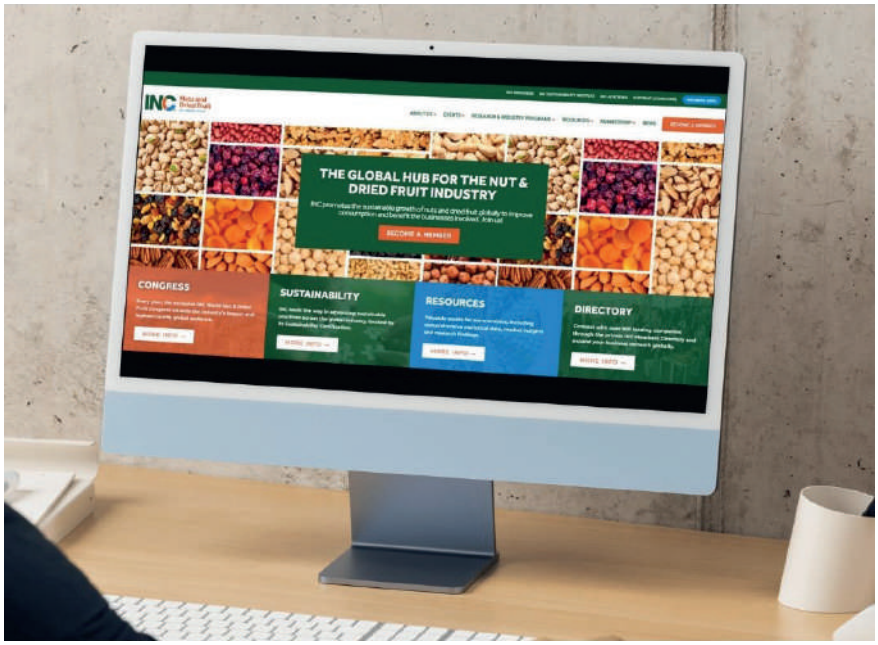




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INC Launches New Website and Brand Identity



Just before the 2026 INC Congress in Macao, the INC unveiled its new brand identity and website. The initiative was not simply about introducing a new logo or enhancing the organization's digital presence; it was about creating a visual identity that reflects the INC's mission and strategic priorities.

"At the heart of the new logo is a redesigned 'C' composed of three distinct elements, each representing one of the INC's strategic priorities."

Over the past years, the mission of the INC has continued to evolve to reflect the needs of the nut and dried fruit industry. With the launch of the Strategic Plan 2026-2030, the INC established a clear framework to guide its efforts in the years ahead. The new brand identity brings that vision to life.

At the heart of the new logo is a redesigned "C" composed of three distinct elements, each representing one of the INC's strategic priorities: increase global consumption and market access; obtain a health claim and update dietary guidelines; and advance sustainable practices in the nut and dried fruit industry. These three pillars form the foundation of the INC's work and its commitment to supporting a stronger, healthier and more sustainable industry.

The rebrand also introduces a new tagline, "Nuts and Dried Fruit for a Better World," replacing the previous "International Nut & Dried Fruit Council" descriptor beneath the INC initials. More than a slogan, it reflects the INC's purpose and the positive contribution that nuts and dried fruit can make to people, communities and the planet.

Alongside the rebrand, the INC also launched a completely redesigned website. More than a simple website refresh, the new platform serves as a central hub for the global nut and dried fruit industry, bringing together the resources, insights and services that support informed decision-making across the value chain. Designed to better serve both members and industry stakeholders, the platform provides streamlined access to the knowledge, tools and expertise that underpin the INC's work around the world.

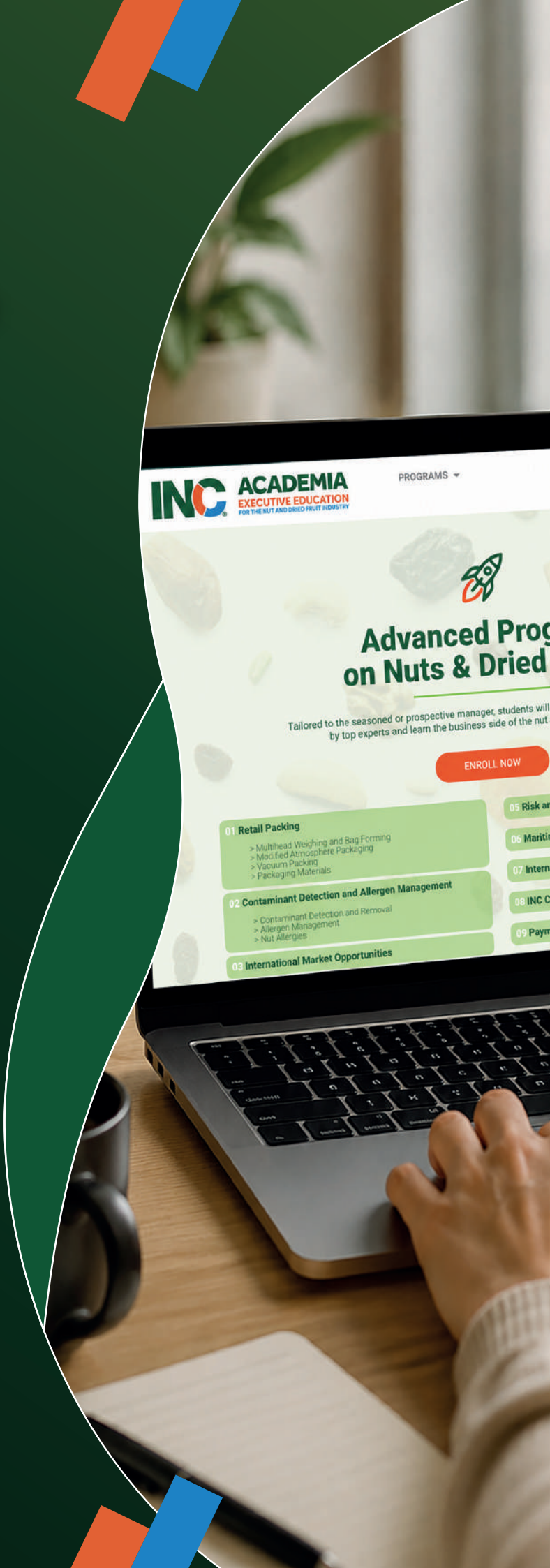
Ultimately, the new brand identity and website are about alignment. They ensure that the way the INC presents itself reflects the breadth of its work, the ambition of its strategic priorities, and the value it delivers to members around the world. Together, they provide a stronger platform from which the INC can continue to connect, support and advance the global nut and dried fruit industry for years to come.

ENROLL NOW

INC Academia

2026/27 Courses Start September 2026

Professional education created exclusively for the global nut and dried fruit industry.



INC® Nuts and Dried Fruit for a Better World

INC-Funded Session Showcases Scientific Evidence on Nuts and Health



Photo: Diabetes and Nutrition Study Group.

At the 43rd International Symposium on Diabetes and Nutrition, the INC-funded session "Emerging Evidence on the Health Benefits of Nuts" brought together leading researchers to present new findings on nuts, diabetes, metabolic health, cognitive performance and disease prevention.

From June 15-18, 2026, a record 220 clinicians, researchers, dietitians and health professionals from 41 countries gathered in Montbrió del Camp, Spain, for the 43rd International Symposium on Diabetes and Nutrition, the annual scientific meeting of the Diabetes and Nutrition Study Group (DNSG). As a study group of the European Association for the Study of Diabetes, the DNSG serves as a leading international forum for discussing advances in nutrition, diabetes, obesity, metabolism and related diseases.

As part of a program that included 115 scientific communications, the INC funded the session "Emerging Evidence on the Health Benefits of Nuts," chaired by Prof. Jordi Salas-Salvadó, Chair of the INC World Forum for Nutrition Research and Dissemination, and Dr. John Sievenpiper of the University of Toronto. The session highlighted the growing body of evidence supporting the role of nuts in promoting health. Presentations by experts from Europe, North America and Asia examined the effects of nut consumption on diabetes prevention, brain health and cognition.

Dr. Peter Joris opened the session with an overview of research examining the effects of nut consumption on insulin sensitivity, brain function and cognition. As population aging accelerates worldwide and dementia becomes an increasing public health challenge, research has linked nut consumption to improvements in brain insulin sensitivity and cerebral vascular function, highlighting the potential of nuts to contribute to cognitive well-being.

Dr. Anoop Misra reviewed evidence showing beneficial effects of nuts on glucose regulation and insulin metabolism. Studies have reported improvements in fasting glucose, insulin resistance and glycemic control, while research among Asian Indians with prediabetes suggests that almond consumption may improve metabolic markers and increase the likelihood of returning to normal glucose regulation.

The relationship between nut intake and cognitive health was explored by Dr. Changzheng Yuan. Research suggests that higher nut consumption is associated with better cognitive performance and a lower risk of dementia, while metabolomic studies are beginning to reveal biological pathways that may explain these benefits.

A highlight of the session was the presentation of preliminary findings from the INC-funded NUTPOOL study by Dr. Marta Guasch-Ferré. Pooling data from 27 cohorts and nearly one million participants across four continents, NUTPOOL is the first large-scale individual participant meta-analysis of its kind to apply a standardized approach to both nut consumption and health outcomes. Early analyses indicate that higher nut consumption is associated with lower risks of type 2 diabetes, cardiovascular disease and mortality.

Additional presentations explored emerging areas of research, and the session concluded with a lively discussion on future research priorities. Together, the presentations reinforced the growing scientific evidence supporting nuts as an important component of healthy dietary patterns.

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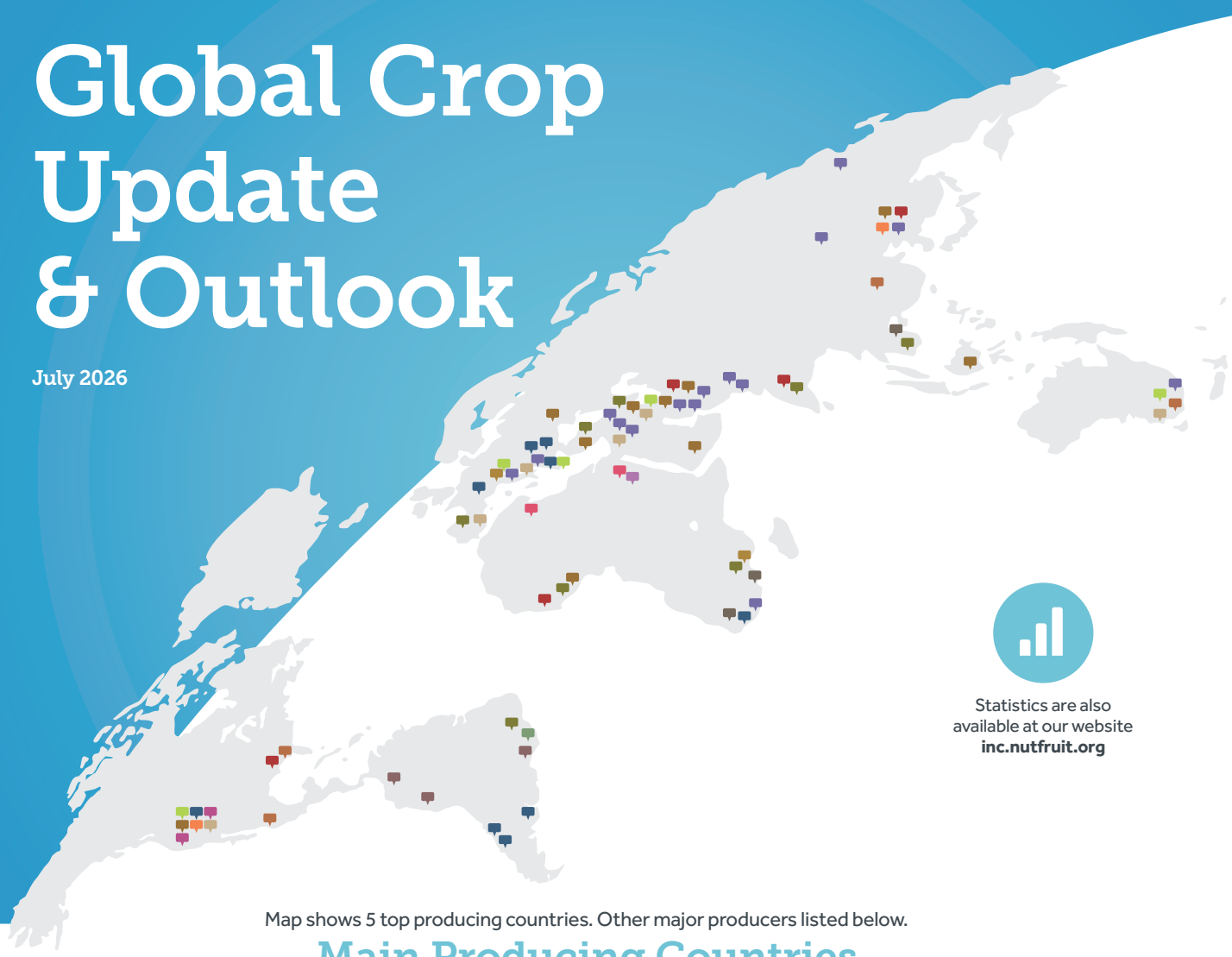


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Global Crop Update & Outlook

July 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

USA	Portugal
Australia	Tunisia
Spain	Chile
Türkiye	Iran
Italy	Greece
Morocco	
China	



Brazil Nuts

Bolivia	
Peru	
Brazil	



Cashews

Côte d'Ivoire	Ghana
Cambodia	Guinea
India	Burkina Faso
Tanzania	Brazil
Viet Nam	Mozambique
Nigeria	Indonesia
Guinea-Bissau	Senegal



Hazelnuts

Türkiye	Iran
Chile	France
USA	Spain
China	
Azerbijan	
Italy	
Georgia	



Macadamias

South Africa	Viet Nam
China	Brazil
Australia	Colombia
Kenya	
USA	
Guatemala	
Malawi	



Pecans

USA	
Mexico	
South Africa	
China	
Australia	
Brazil	
Argentina	



Pine Nuts

China	Italy
North Korea	Portugal
Russia	Spain
Afghanistan	
Pakistan	
Mongolia	
Türkiye	



Pistachios

USA	Australia
Iran	Afghanistan
Türkiye	China
Syria	
Spain	
Greece	
Italy	



Walnuts

China	France
USA	India
Chile	Argentina
Ukraine	Spain
Romania	Moldova
Türkiye	Italy
Iran	Portugal



Peanuts

China	Sudan
India	Indonesia
Nigeria	Ghana
USA	Viet Nam
Senegal	Côte d'Ivoire
Argentina	Nicaragua
Brazil	South Africa



Dates

Saudia Arabia	Israel
Egypt	Morocco
UAE	Jordan
Tunisia	USA
Iran	Oman
Algeria	Pakistan
Iraq	Mexico



Dried Apricots

Türkiye	South Africa
Uzbekistan	
Iran	
Takikistan	
Aghanistan	
China	
USA	



Dried Cranberries

USA	
Canada	
Chile	



Dried Figs

Türkiye	
Iran	
Afghanistan	
Spain	
Greece	
Italy	
USA	



Prunes

USA	South Africa
Chile	
France	
Argentina	
Serbia	
Australia	
Italy	



Raisins Sultanas Currants

China	Uzbekistan
India	Argentina
Türkiye	Afghanistan
USA	Australia
Iran	Greece
South Africa	
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 May and June 2026.

USA. The May 2026 Almond Board of California Position Report, published on June 11, showed receipts of 2.691 billion pounds (approx. 1.221 million metric tons) crop year-to-date, just 0.77% below 2024/25. August through May total shipments added up to 2.213 B lbs (1 M MT), down 2.19% vs. 2024/25. Domestic shipments of 492.31 M lbs (223,300 MT) were down 13.61% from the same period in 2024/25, leading the shortfall in YTD shipments. Exports were up 1.66% at 1.720 B lbs (780,500 MT), with shipments to Asia-Pacific down by 3%, while exports to Middle East/Africa and Europe were up 6% and 5%, respectively. According to industry sources, the 2025/26 crop was, as of this report, expected to finish at around 2.7 B lbs (1.2 M MT). Carryout was projected at 550 M lbs (249,700 MT) or less, a manageable inventory.

According to the USDA NASS Subjective Forecast, the 2026 crop is forecasted at 2.70 B lbs (1.224 MT). Average yield of 1,940 lbs per bearing acre (2.17 MT/hectare) remains unchanged from 2025, while bearing acreage is projected to slightly decline from 1.40 M acres (566,560 ha) to 1.39 M acres (562,513 ha). Reports of hull split 10-15 days earlier than normal point to an earlier harvest.

Australia. Australia entered the 2026/27 season with a strong crop set and expectations for a rebound from the previous year. However, severe rainfall impacted two of the country's main growing regions during harvest, affecting quality and significantly delaying harvesting operations. As of this report, the 2026 crop was estimated at 166,892 MT, up 7% from 2025/26.

As reported by the Almond Board of Australia in kernel weight equivalent, the 2025/26 marketing year closed with combined shipments of 154,113 MT, 9% below the previous season. Export shipments totaled 130,029 MT, down 9% year-on-year but still the second-highest volume on record, while domestic shipments reached 24,083 MT, 7% lower year-on-year. China remained the leading export destination, accounting for approximately 58% of total exports, although shipments were 1% below the prior season. In the new 2026/27 season, March-April combined shipments reached 16,970 MT, 3% below the same period last year. Exports, at 13,246 MT, were down 5%, while domestic shipments (3,724 MT) increased 3%. China started the season strongly, with shipments up 33% year-on-year and representing around 54% of total exports. In-shell exports continued to exceed kernel shipments year-to-date.

Spain. As of this report, the Spanish almond sector was expecting a strong crop in 2026, supported by favorable climatic conditions and the continued entry into production of orchards planted over the last decade. A cold winter with sufficient chill hours and abundant rainfall, which did not disrupt flowering unlike in previous seasons, supported favorable development. The varieties Lauranne and Guara were reported to be performing exceptionally well.

The crop outlook was very positive, particularly in irrigated areas of the Ebro Valley (Zaragoza and Huesca in Aragón); the Guadalquivir Valley (Sevilla and Córdoba in Andalucía) and the Guadiana Valley (Badajoz and Cáceres in Extremadura). A frost event on March 30 affected production areas in Ciudad Real and Albacete (Castilla-La Mancha), Granada, and parts of Málaga and Almería (Andalucía), where a significant share of Spain's rainfed organic almond production is concentrated, leading to expectations of tighter supply in the organic segment.

According to AEOFRUSE and other Spanish organizations, the 2025/26 productive area is estimated at 645,964 ha, 6% up from the previous season, reflecting the continued entry into production of new orchards.

Estimated World Almond Production. Kernel Basis · Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA (MM lbs)	484	2,646	**3,130**	550	550	2,646	**3,196**	550
USA	219,700	1,201,300	**1,421,000**	249,700	249,700	1,201,300	**1,451,000**	249,700
AUSTRALIA	13,553	155,697	**169,250**	11,085	11,085	166,892	**177,977**	20,000
SPAIN	12,000	105,000	**117,000**	10,700	10,700	146,000	**156,700**	8,000
TÜRKIYE	0	35,000	**35,000**	0	0	35,000	**35,000**	0
PORTUGAL	0	16,300	**16,300**	0	0	30,000	**30,000**	0
ITALY	1,000	22,200	**23,200**	1,100	1,100	22,400	**23,500**	1,100
CHINA	0	20,000	**20,000**	0	0	22,000	**22,000**	0
MOROCCO	2,500	18,100	**20,600**	2,700	2,700	18,100	**20,800**	2,500
TUNISIA	1,000	13,500	**14,500**	1,500	1,500	16,500	**18,000**	1,800
GREECE	0	5,000	**5,000**	0	0	14,500	**14,500**	0
CHILE	0	12,800	**12,800**	0	0	9,500	**9,500**	0
IRAN	2,000	6,100	**8,100**	2,000	2,000	6,200	**8,200**	2,000
OTHERS	0	16,300	**16,300**	0	0	17,000	**17,000**	0
WORLD TOTAL	**251,753**	**1,627,297**	**1,879,050**	**278,785**	**278,785**	**1,705,392**	**1,984,177**	**285,100**
WORLD CONSUMPTION (Supply-End. Stock)				**1,600,265**				

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. Sources 2026/27: USDA, Almond Board of Australia, AEOFRUSE, Portugal Nuts, Chilean Almond Board, 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 2% Loss and Exempt.

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 May and June 2026.

The 2025 crop fell to approximately 19,400 metric tons (kernel basis), following substantial reductions, particularly in Bolivia and Peru. The season can be compared to the record-low 2017 crop, which remains the most recent example of a similarly severe production shortfall. In contrast, expectations for the 2026 crop, as of this report, pointed to a recovery in production across the main origins. The drought and high temperatures experienced in the Amazon were the key reasons behind the poor 2025 crop, while wetter conditions supported improved production in 2026.

As discussed during the round table at the INC Congress in Macao, following the exceptionally high prices recorded after the 2025 short crop, values subsequently eased before stabilizing and moving upward again. With limited volumes remaining available, upward price pressure continued throughout the remainder of the campaign.

Fluctuations in availability are quickly reflected in prices, often prompting rapid reactions across the supply chain. At the consumer level, category performance is influenced not only by price but also by product availability. Unlike many other nut categories, where growth is often driven by pricing and innovation, Brazil nuts frequently face the challenge of maintaining a consistent presence on retail shelves during years of reduced supply.

The market tends to respond differently depending on the severity of the crop reduction. In years of relatively modest declines, retail prices may increase without materially affecting consumption, particularly if prices of other nuts are also rising. More significant reductions can lead retailers to limit distribution, reduce pack sizes or remove Brazil nuts from certain product categories (e.g., removal of monopacks and/or removal of Brazil nuts from mixed nuts), thereby affecting consumption growth. In extreme shortage years, such as 2025, widespread delisting becomes more common as retailers respond to limited availability and elevated prices, resulting in a significant decline in consumption.

At the same time, the experience following both the 2017 and 2025 short crops reflects the category's resilience. Although many retailers temporarily removed Brazil nuts from their assortments during periods of severe shortage, the vast majority subsequently reintroduced the product once supply conditions improved. The strong demand observed following these re-listings is a positive indication of the robustness of the category and its long-term growth potential.

Against this backdrop, it is essential to further strengthen consumer awareness of Brazil nuts, highlighting not only their selenium content and associated health benefits, but also their contribution to supporting Amazonian communities and preserving the economic value of forests. Firm market prices are important for supporting collectors, processors and exporters. By generating sustainable income from the forest, Brazil nuts help reduce pressure for conversion to alternative land uses, such as cattle or corn farming, and contribute to the long-term preservation of the Amazon ecosystem.

Innovation is another opportunity for the sector. While Brazil nuts have traditionally seen limited product development compared to other nut categories, examples such as flavored and chocolate-coated Brazil nuts are ways of expanding consumption. China is a market showing growing interest in Brazil nuts, particularly due to consumer awareness of selenium-related health benefits, although demand remains sensitive to price increases. Future growth is expected to come from younger consumers (Gen Z) and from markets where consumption remains relatively low, particularly across Southeast Asia.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
BOLIVIA	3,000	45,000	**48,000**	900	900	80,100	**81,000**	4,500
PERU	900	9,300	**10,200**	300	300	16,500	**16,800**	1,380
BRAZIL	300	3,900	**4,200**	300	300	8,700	**9,000**	600
WORLD TOTAL	**4,200**	**58,200**	**62,400**	**1,500**	**1,500**	**105,300**	**106,800**	**6,480**
WORLD CONSUMPTION (Supply-End. Stock)				**60,900**				

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
BOLIVIA	1,000	15,000	**16,000**	300	300	26,700	**27,000**	1,500
PERU	300	3,100	**3,400**	100	100	5,500	**5,600**	460
BRAZIL	100	1,300	**1,400**	100	100	2,900	**3,000**	200
WORLD TOTAL	**1,400**	**19,400**	**20,800**	**500**	**500**	**35,100**	**35,600**	**2,160**
WORLD CONSUMPTION (Supply-End. Stock)				**20,300**				

Source: INC. 2025/26 refers to the marketing year from March 2025 to February 2026; and 2026/27 covers March 2026 to February 2027 (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 May and June 2026.

Global 2026/27 production was, at the time of this report, expected to decline slightly vs. 2025/26. Crop quality was the main concern across major producing origins. Lower kernel outturn ratios and a higher defect proportion were reported in West Africa, India, Cambodia and Viet Nam, potentially impacting processing efficiency and costs, and limiting marketable kernel volume. By early June, the northern hemisphere harvest was almost complete with no late flushes anticipated.

European and Middle Eastern kernel demand was subdued, while Asian markets, particularly China, showed stronger appetite. Imports into the USA were running ahead of 2025. Availability of large-sized kernels and pieces was increasingly tight, placing additional pressure on kernel prices. Rising energy costs and inflation remain a risk to demand growth.

West Africa. In West Africa, 2026 crop size and quality have fallen short of earlier expectations, with limited availability of premium-grade kernels anticipated for the second half of the year, supporting higher raw material prices. Côte d'Ivoire was projected at 1.46 million metric tons of raw cashew nuts. Local processing continued to expand, increasing from 344,000 MT to 525,000 MT between 2023 and 2025.

Cambodia & Viet Nam. Cambodia's 2026 crop was expected to reach 965,000 MT, slightly above 2025, and Viet Nam's was forecasted at 310,000 MT. Last season, Viet Nam imported more than 3 M MT of RCN and exported nearly 800,000 MT of kernels, both records. RCN imports from Cambodia reached a record 1 M MT of RCN, surpassing Côte d'Ivoire as the largest supplier, reflecting the expanding processing capacity in Côte d'Ivoire. This season, at the time of reporting, imports from Cambodia were already around 800,000 MT. Shipments to China increased from 80,500 MT in 2023 to 156,700 MT in 2025, overtaking the European Union and USA.

India. Crop 2026 was forecast at approximately 730,000 MT. RCN imports from Africa continued to increase, rising by 14.5% between 2024 and 2025. Processing capacity keeps expanding, although the focus has increasingly shifted from exports to domestic consumption.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CAMBODIA	n/a	930,000	930,000	n/a	n/a	965,000	965,000	n/a
INDIA	n/a	725,000	725,000	n/a	n/a	730,000	730,000	n/a
VIET NAM	n/a	320,000	320,000	n/a	n/a	310,000	310,000	n/a
CÔTE D'IVOIRE	n/a	1,500,000	1,500,000	n/a	n/a	1,460,000	1,460,000	n/a
NIGERIA	n/a	370,000	370,000	n/a	n/a	355,000	355,000	n/a
GUINEA-BISSAU	n/a	300,000	300,000	n/a	n/a	290,000	290,000	n/a
BENIN	n/a	300,000	300,000	n/a	n/a	290,000	290,000	n/a
GHANA	n/a	275,000	275,000	n/a	n/a	255,000	255,000	n/a
BURKINA FASO	n/a	250,000	250,000	n/a	n/a	220,000	220,000	n/a
GUINEA CONAKRY	n/a	200,000	200,000	n/a	n/a	180,000	180,000	n/a
TOGO	n/a	145,000	145,000	n/a	n/a	130,000	130,000	n/a
SENEGAL	n/a	70,000	70,000	n/a	n/a	72,500	72,500	n/a
GAMBIA	n/a	35,000	35,000	n/a	n/a	30,000	30,000	n/a
MALI	n/a	5,000	5,000	n/a	n/a	5,000	5,000	n/a
Subtotal Western Africa	**n/a**	**3,450,000**	**3,450,000**	**n/a**	**n/a**	**3,287,500**	**3,287,500**	**n/a**
Subtotal Northern Hemisphere	**n/a**	**5,425,000**	**5,425,000**	**n/a**	**n/a**	**5,292,500**	**5,292,500**	**n/a**
TANZANIA	n/a	500,000	500,000	n/a	n/a	490,000	490,000	n/a
MOZAMBIQUE	n/a	140,000	140,000	n/a	n/a	130,000	130,000	n/a
KENYA	n/a	5,000	5,000	n/a	n/a	5,500	5,500	n/a
Subtotal Eastern Africa	**n/a**	**645,000**	**645,000**	**n/a**	**n/a**	**625,500**	**625,500**	**n/a**
BRAZIL	n/a	136,000	136,000	n/a	n/a	129,000	129,000	n/a
INDONESIA	n/a	110,000	110,000	n/a	n/a	100,000	100,000	n/a
Subtotal Southern Hemisphere	**n/a**	**891,000**	**891,000**	**n/a**	**n/a**	**854,500**	**854,500**	**n/a**
OTHERS	n/a	67,300	67,300	n/a	n/a	67,500	67,500	n/a
WORLD TOTAL	**n/a**	**6,383,300**	**6,383,300**	**n/a**	**n/a**	**6,214,500**	**6,214,500**	**n/a**
WORLD CONSUMPTION (Supply-End. Stock)				**6,383,300**				

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). 2025/26: Harvest from January 2025 through June 2025 (northern hemisphere) and from September 2025 through February 2026 (southern hemisphere). 2026/27: Harvest from January 2026 through June 2026 (northern hemisphere) and from September 2026 through February 2027 (southern hemisphere).

Hazelnuts

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



The information contained herein was prepared between May and July 2026.

Türkiye. As per the Black Sea Hazelnut Exporters' Association, the 2026/27 crop was, at the time of reporting, forecasted at 810,000 metric tons in-shell, based on early May orchard surveys. Adequate chilling, abundant rainfall and the absence of major weather disruptions supported expectations. However, final production still depended on conditions during the remainder of the season, particularly the potential impact of drought and the brown marmorated stink bug. The release of the objective 2026 crop forecast is scheduled for the end of July.

With healthy carryover stocks from the current crop, supply was expected to remain comfortable next season. However, much of the inventory is reportedly of lower quality. Year-to-date exports through May were at 150,592 MT, 42% down from 2024/25, reflecting weaker demand.

USA. As discussed during the INC Congress in Macao, the US industry continued to expand over the last decade, supported by strong grower investment and varietal innovation. Expansion accelerated between 2014 and 2018, before slowing as trade tensions with China altered market dynamics and shifted the industry from a predominantly in-shell market towards greater kernel production. Following the stronger price environment in 2025, expectations remain positive for continued growth, particularly in Oregon and Washington.

Chile. As of this report, the crop was forecasted at 120,000 MT, in line with last season. The domestic industry has expanded significantly over the past decade, supported by strong grower returns, highly mechanized production, high productivity and counter-season offer, strengthening its position in international markets.

Italy. The 2026 crop is developing around one week ahead of the historical average. Favorable June rainfall and limited stink bug pressure have improved prospects, although recent heatwaves and localized hail remain a source of concern.

China. At the time of reporting, the 2026 crop was expected to reach 100,000 MT. Supported by government programs, private investment and varietal improvement, planted area increased from 100 hectares in 2000 to 123,000 ha in 2025, with 70% concentrated in Liaoning, Jilin and Heilongjiang and further growth expected in the coming years.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
TÜRKIYE	150,000	518,000	**668,000**	150,000	150,000	809,940	**959,940**	220,000
USA	1,000	110,000	**111,000**	3,000	3,000	123,500	**126,500**	3,000
CHILE	1,500	120,700	**122,200**	1,500	1,500	120,000	**121,500**	1,500
ITALY	5,000	65,000	**70,000**	1,000	1,000	115,000	**116,000**	1,000
CHINA	1,500	88,000	**89,500**	2,000	2,000	100,000	**102,000**	2,200
AZERBAIJAN	0	60,000	**60,000**	1,000	1,000	65,000	**66,000**	1,500
GEORGIA	500	45,000	**45,500**	2,000	2,000	45,000	**47,000**	0
IRAN	0	24,000	**24,000**	1,200	1,200	22,600	**23,800**	1,100
SPAIN	0	7,500	**7,500**	0	0	10,530	**10,530**	0
FRANCE	0	9,000	**9,000**	500	500	9,500	**10,000**	600
OTHERS	0	33,100	**33,100**	0	0	36,000	**36,000**	0
WORLD TOTAL	**159,500**	**1,080,300**	**1,239,800**	**162,200**	**162,200**	**1,457,070**	**1,619,270**	**230,900**
WORLD CONSUMPTION (Supply-End. Stock)				**1,077,600**				

Estimated World Hazelnut Production, Kernel Basis · Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
TÜRKIYE	75,000	246,100	**321,100**	71,300	71,300	404,970	**476,270**	110,000
USA	440	48,400	**48,840**	1,320	1,320	53,500	**54,820**	1,290
CHILE	660	53,100	**53,760**	880	880	52,800	**53,680**	660
ITALY	2,200	28,000	**30,200**	430	430	49,500	**49,930**	430
CHINA	600	35,200	**35,800**	800	800	40,000	**40,800**	880
AZERBAIJAN	0	21,500	**21,500**	360	360	23,400	**23,760**	540
GEORGIA	175	15,800	**15,975**	700	700	15,800	**16,500**	0
IRAN	0	10,100	**10,100**	500	500	9,500	**10,000**	460
SPAIN	0	3,400	**3,400**	0	0	4,770	**4,770**	0
FRANCE	0	3,600	**3,600**	200	200	3,800	**4,000**	240
OTHERS	0	13,800	**13,800**	0	0	15,100	**15,100**	0
WORLD TOTAL	**79,075**	**479,000**	**558,075**	**76,490**	**76,490**	**673,140**	**749,630**	**114,500**
CONSUMPTION (Supply-End. Stock)				**481,585**				

Sources 2025/26: Black Sea Hazelnut Exporters' Association, Hazelnut Committee of Chile, China Chamber of Commerce for Import and Export of Foodstuffs, Georgian Hazelnut Growers Association, AEOFRUSE, and other INC sources. Sources 2026/27: 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 / مكاديميا / मैकाडामिया / Macadamia / Macadâmias / Macadamia / Makedemia cevizi

The information contained herein was prepared between May and July 2026.

China. At the time of this report, the 2026 crop was estimated at 108,000 metric tons in-shell (at 3.5% moisture content), after grading and quality selection. Improvements in orchard management, financial assistance and technical support from local governments have contributed to higher yields and quality.

China continues to be a major importer. The removal of import duties on African macadamias is expected to increase competition among growers and processors in terms of quality and production efficiency.

South Africa. As of this report, the crop was forecasted at 95,000 MT, in line with long-term expansion trends, as new plantings enter production.

To accommodate rising production, the industry continues to invest in processing infrastructure, expanding cracking capacity and value-added operations such as roasting, paste production and food safety systems, which are expected to facilitate product innovation and increase the use of macadamias as an ingredient.

Australia. As per the Australian Macadamia Society, the 2026 crop forecast has been revised down to 56,888 MT in-shell at 3.5% moisture (61,000 MT at 10%), but still expected to exceed the 2025 crop. At the time of this report, harvest had progressed to 90-95% in Bundaberg. Despite flooding earlier in the season, conditions in Bundaberg were favorable, allowing harvest to progress ahead of other regions and delivering good-quality nuts. Persistent rainfall has delayed harvest in northern New South Wales and parts of southeast Queensland. There is still a bit of harvest to go in Northern Rivers growing area.

Kenya. The 2026 crop was forecasted to increase by approximately 5% year-on-year. Despite challenging weather conditions, including heavy rainfall early during harvest, production growth keeps being supported by maturing orchards.

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	81,660	**81,660**	n/r	n/r	95,000	**95,000**	n/r
AUSTRALIA	n/r	43,800	**43,800**	n/r	n/r	56,888	**56,888**	n/r
KENYA	n/r	51,850	**51,850**	n/r	n/r	54,500	**54,500**	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**	**343,660**	**343,660**	**n/r**	**n/r**	**391,738**	**391,738**	**n/r**
ESTIMATED WORLD CONSUMPTION (Supply-End, Stock)				**343,660**				

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	26,500	**26,500**	n/r	n/r	30,800	**30,800**	n/r
AUSTRALIA	n/r	13,800	**13,800**	n/r	n/r	18,400	**18,400**	n/r
KENYA	n/r	10,370	**10,370**	n/r	n/r	10,900	**10,900**	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**	**90,475**	**90,475**	**n/r**	**n/r**	**104,515**	**104,515**	**n/r**
ESTIMATED WORLD CONSUMPTION (Supply-End. Stock)				**90,475**				

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.

Pecans

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

The information contained herein was prepared between May and June 2026.



USA. As discussed during the INC Congress in Macao, overall output has remained relatively stable for many years, ranging between 120,000 and 140,000 metric tons in-shell. Georgia is the largest producer in terms of planted area, although it also records low average yields. Production has gradually shifted westward in recent years, with New Mexico increasing its share. Nevertheless, overall planted area has remained largely unchanged, with the most recent plantings associated with orchard replacement rather than expansion, reflecting the impact of market conditions on grower investment decisions.

At the time of this report, weather was one of the main sources of uncertainty for the 2026/27 crop. Drought conditions continue to affect important producing regions, particularly Georgia, with the long-term effects of recent hurricanes still being assessed. In western growing areas, shorter winters and reduced chilling hours were the main concern.

Mexico. Following the 2022 bumper crop, production has trended lower, with the 2026/27 crop expected to be slightly above the previous season.

Growers continue to face significant challenges related to water availability, particularly in the northern producing regions where most orchards are located. Rising production costs have added further pressure. Planted area has remained largely stable. Nevertheless, the industry benefits from an established orchard base, extensive experience and well-developed infrastructure, while domestic demand has remained resilient despite higher prices.

South Africa. According to SAPPA's June estimate, the 2026 crop was forecasted at 54,500 MT, with good quality anticipated. As discussed during the INC Congress in Macao, the South African industry continues to expand as orchards planted over the past decade enter production; annual plantings averaged 5,000 hectares during this period.

Export markets remain central, with approximately 95% of production destined for China. In turn, Chinese processors are developing sales in non-traditional pecan markets, such as South Korea, East Asia and the Middle East, with South African pecans moving into those channels through China.

China. China combines strong import demand with expanding domestic production. The 2025 crop was estimated at 6,200 MT following weather-related challenges, but was, at the time of reporting, expected to recover to 11,700 MT in 2026. With over 100,000 ha planted, production is anticipated to increase significantly over the coming years.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA	10,400	129,500	**139,900**	14,200	14,200	130,000	**144,200**	14,000
MEXICO	2,000	116,500	**118,500**	2,000	2,000	120,000	**122,000**	2,500
SOUTH AFRICA	1,000	50,250	**51,250**	810	810	54,500	**55,310**	1,000
CHINA	20	6,200	**6,220**	50	50	11,700	**11,750**	100
BRAZIL	0	3,500	**3,500**	0	0	10,000	**10,000**	0
AUSTRALIA	0	3,600	**3,600**	0	0	3,400	**3,400**	0
ARGENTINA	0	3,000	**3,000**	0	0	3,300	**3,300**	0
OTHERS	0	3,500	**3,500**	0	0	3,700	**3,700**	0
WORLD TOTAL	**13,420**	**316,050**	**329,470**	**17,060**	**17,060**	**336,600**	**353,660**	**17,600**
WORLD CONSUMPTION (Supply-End. Stock)				**312,410**				

Estimated World Pecan Production. Kernel Basis · Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA	5,200	64,800	**70,000**	7,100	7,100	65,000	**72,100**	7,000
MEXICO	1,000	58,250	**59,250**	1,000	1,000	60,000	**61,000**	1,250
SOUTH AFRICA	500	27,600	**28,100**	445	445	29,900	**30,345**	550
CHINA	10	3,400	**3,410**	28	28	6,435	**6,463**	55
BRAZIL	0	1,750	**1,750**	0	0	5,000	**5,000**	0
AUSTRALIA	0	1,870	**1,870**	0	0	1,770	**1,770**	0
ARGENTINA	0	1,500	**1,500**	0	0	1,650	**1,650**	0
OTHERS	0	1,820	**1,820**	0	0	1,920	**1,920**	0
WORLD TOTAL	**6,710**	**160,990**	**167,700**	**8,573**	**8,573**	**171,675**	**180,248**	**8,855**
WORLD CONSUMPTION (Supply-End. Stock)				**159,128**				

Sources: USDA, 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 May and July 2026.

Asia. China recorded a moderate 2025 crop, although weak market conditions resulted in significant carryover stocks from 2024. At the time of this report, the 2026 crop was projected to double; however, it was still not expected to be a bumper crop. In Russia and Mongolia, *Pinus sibirica* production remained below normal levels in 2025 with no bumper crops anticipated for 2026.

The larger 2026 crop expected in Afghanistan, with bigger nut sizes, favors demand from China, where larger-sized in-shell pine nuts are particularly sought after. While a significant share of Afghanistan's crop is still processed in Pakistan, new shelling and processing facilities are gradually being established in Afghanistan.

In terms of demand, the market for pine nut kernels remains strong in China, while the Mediterranean region is now entering the pesto season.

Mediterranean. Turkish 2026 production was expected to increase. Despite a substantial increase in prices, exports during the first months of the season rose year-on-year, reflecting resilient demand from Europe. Information from Portugal and Spain indicate that, as of this report, the 2026 harvest, although small, was expected to be slightly better than previously anticipated. Prices remained high.

Although production prospects beyond 2026 are optimistic, prolonged periods of low output have led to reduced processing activity across the region, raising questions about future processing capacity once larger crops return.

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

Country	2025/2026				2026/2027			
	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	30,000	30,000	**60,000**	1,500	1,500	60,000	**61,500**	2,000
RUSSIA (Siberia)	1,000	11,000	**12,000**	500	500	40,000	**40,500**	4,000
NORTH KOREA	4,000	20,000	**24,000**	6,000	6,000	20,000	**26,000**	8,000
AFGHANISTAN	720	7,800	**8,520**	2,600	2,600	16,000	**18,600**	5,700
MONGOLIA	600	2,000	**2,600**	300	300	10,000	**10,300**	1,000
PAKISTAN	480	5,200	**5,680**	1,700	1,700	2,000	**3,700**	110
SUBTOTAL	**36,800**	**76,000**	**112,800**	**12,600**	**12,600**	**148,000**	**160,600**	**20,810**
MEDITERRANEAN *(Pinus pinea)*								
TÜRKIYE	1,100	7,600	**8,700**	4,600	4,600	8,900	**13,500**	4,700
PORTUGAL	60	60	**120**	80	80	670	**750**	0
SPAIN	150	50	**200**	80	80	670	**750**	0
ITALY	0	500	**500**	50	50	500	**550**	0
OTHERS	0	380	**380**	0	0	440	**440**	0
SUBTOTAL	**1,310**	**8,590**	**9,900**	**4,810**	**4,810**	**11,180**	**15,990**	**4,700**
WORLD TOTAL	**38,110**	**84,590**	**122,700**	**17,410**	**17,410**	**159,180**	**176,590**	**25,510**
WORLD CONSUMPTION (Supply-End. Stock)				**105,290**				

Estimated World Pine Nut Production, Kernel Basis · Metric Tons

Country	2025/2026				2026/2027			
	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	7,500	7,500	**15,000**	375	375	15,000	**15,375**	500
RUSSIA (Siberia)	300	4,000	**4,300**	180	180	10,000	**10,180**	1,000
NORTH KOREA	1,000	5,000	**6,000**	1,500	1,500	5,000	**6,500**	2,000
AFGHANISTAN	370	4,000	**4,370**	1,330	1,330	6,400	**7,730**	2,300
MONGOLIA	150	660	**810**	100	100	2,500	**2,600**	250
PAKISTAN	245	2,650	**2,895**	870	870	800	**1,670**	44
SUBTOTAL	**9,565**	**23,810**	**33,375**	**4,355**	**4,355**	**39,700**	**44,055**	**6,094**
MEDITERRANEAN *(Pinus pinea)*								
TÜRKIYE	250	1,750	**2,000**	1,060	1,060	1,980	**3,040**	1,100
PORTUGAL	12	12	**24**	12	12	100	**112**	0
SPAIN	30	10	**40**	12	12	100	**112**	0
ITALY	0	100	**100**	10	10	100	**110**	0
OTHERS	0	80	**80**	0	0	92	**92**	0
SUBTOTAL	**292**	**1,952**	**2,244**	**1,094**	**1,094**	**2,372**	**3,466**	**1,100**
WORLD TOTAL	**9,857**	**25,762**	**35,619**	**5,449**	**5,449**	**42,072**	**47,521**	**7,194**
WORLD CONSUMPTION (Supply-End. Stock)				**30,170**				

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 May and July 2026.



USA. The 2026 pistachio crop, at the time of reporting, is forecasted at 315,000 metric tons in-shell, about 40% down from the previous off-year in 2024, and almost 60% below the 2025 crop. Despite adequate chill hours, bloom was severely disrupted by 10 days of record heat (over 32° C) causing significant cluster damage. The industry is monitoring further negative impacts from the March record heat during July nut fill.

According to the Administrative Committee for Pistachios, total shipments through May amounted to 411,935 MT (in-shell equivalent), 20% up from 2024/25. Export shipments added up to 328,214 MT (in-shell equivalent), 25% up from the prior season, driven by a 27% increment in in-shell exports (301,919 MT). Europe, with 123,703 MT, recorded a growth of 26%. Asia, with a total of 118,877 MT, was up 8%, reflecting stable demand from India and increased shipments to South Korea, Japan and Southeast Asia. Shipments to the Middle East and North Africa (65,610 MT) increased by 77%, supported in part by re-export activity throughout the region. Kernel demand continued to be a key driver of market growth. Domestic shipments (83,721 MT) were up by 3% from 2024/25, showing significant year-on-year growth in kernel shipments (30,870 MT), which were running 11% above the prior season.

As discussed during the INC Congress in Macao, although new plantings have slowed over the last few years—mainly due to limited land with reliable water supplies and rising water costs—the outlook for production growth remains positive, supported by acreage planted in previous years.

Iran. As reported by the Iran Pistachio Association, the crop forecast for 2026—an off-year for Iranian pistachios—stood at 130,000 MT at the time of this report. Moreover, irrigation disruptions caused by a country-wide electricity shortage were expected to negatively impact the upcoming crop. Year-to-date export shipments (September 2025-May 2026) reached 125,000 MT (in-shell equivalent), 27% below the previous year for the same period. The decline reflected war-related disruptions, operational challenges and export restrictions affecting several markets. Demand in the Commonwealth of Independent States continued to hold up well and was expected to strengthen during the summer. Exports to Türkiye and the Indian subcontinent remained strong, with their market share increasing year-on-year. The Far East export share declined significantly, from 22% to 7%, following changes to export license regulations and in-shell price increases due to strong kernel demand. Although war-related disruptions temporarily reduced kernel exports, shipments have significantly recovered during recent months. The ending inventory through May was estimated at 96,000 MT, 40% of this year's opening inventory, pointing to a record high carryover. As the industry is heading into an off-year pistachio crop, this high carryover may help balance supply.

Türkiye. The 2026 crop benefited from favorable winter conditions. However, a severe storm in early May affected several growing areas. At the time of this report, preliminary assessments suggested crop losses of around 10-15% from previous forecasts.

The expansion of new plantings has largely stabilized. However, a substantial proportion of orchards are still non-bearing, providing significant production potential in the years ahead. As these orchards enter production, the alternate bearing is expected to moderate.

In response to limited supply and high prices, imports were liberalized for the first time this year, although still subject to a 43.2% tariff. Strong domestic demand and elevated prices have constrained export activity, while inflationary pressures and currency controls have further reduced international competitiveness. Kernel consumption remains a major component of demand, and is expected to remain strong, reflecting the established role of pistachios in traditional dessert products and their increasing use as an ingredient across multiple applications.

Spain. Total planted area amounts to 90,000 hectares, with only 30% currently bearing. New plantings have shifted to larger, fully irrigated orchards, supporting higher yields, while young orchards provide long-term growth potential.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA	52,300	722,670	**774,970**	90,000	90,000	315,000	**405,000**	50,000
TÜRKIYE	143,400	114,600	**258,000**	89,300	89,300	136,450	**225,750**	53,400
IRAN	15,000	225,000	**240,000**	60,000	60,000	130,000	**190,000**	20,000
SYRIA	0	13,350	**13,350**	0	0	31,000	**31,000**	0
SPAIN	0	9,500	**9,500**	0	0	10,500	**10,500**	0
GREECE	0	6,000	**6,000**	0	0	8,700	**8,700**	0
AUSTRALIA	0	3,000	**3,000**	0	0	5,500	**5,500**	0
AFGHANISTAN	0	2,600	**2,600**	0	0	2,700	**2,700**	0
ITALY	300	4,700	**5,000**	470	470	1,000	**1,470**	0
CHINA	0	320	**320**	0	0	450	**450**	0
WORLD TOTAL	**211,000**	**1,101,740**	**1,312,740**	**239,770**	**239,770**	**641,300**	**881,070**	**123,400**
WORLD CONSUMPTION (Supply-End. Stock)				**1,072,970**				

Sources 2025/26: Administrative Committee for Pistachios, Iran Pistachio Association, Greek Nuts & Fruits Trade Association, Australia Pistachio Growers' Association, and other INC sources. Sources 2026/27: Iran Pistachio 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 May and July 2026.

China. The 2026 crop was, at the time of this report, forecasted at 1.6 million metric tons in-shell. Carryover stocks reached record-low levels at the end of the 2024/25 season, while current and projected inventories are substantially larger.

Export growth in 2025 was led by shelled walnuts, which increased by 70%, while in-shell exports rose by 1%, according to Chinese Customs. Domestic demand continued to benefit from competitive pricing and product innovation, with expanding applications across retail, bakery and food service.

USA. As of this report, the 2026 California crop was forecasted at 689,500 MT, above earlier expectations, supported by ideal weather conditions during May and June. Although larger than in previous years, initial inventories were expected to be manageable, as quality was excellent and shipments continued at a steady pace.

As reported by the California Walnut Board and Commission, year-to-date in-shell exports through May reached 277.9 million pounds (126,068 MT), up 114% from 2024/25, and kernel exports of 283M lbs (128,345 MT) increased 18%. In the Middle East, in-shell shipments increased nearly fourfold, while kernel exports to Europe rose 24%, supported by Germany, Italy and Spain, while Asia remained stable.

Chile. The 2026 crop was estimated at 165,000 MT, 10% down from the previous crop. Favorable harvest conditions resulted in good quality, while exports continued to move steadily on sustained demand from key markets.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	20,000	1,500,000	**1,520,000**	100,000	100,000	1,600,000	**1,700,000**	120,000
USA	63,000	734,300	**797,300**	90,720	90,720	689,500	**780,220**	95,000
CHILE	400	182,800	**183,200**	1,300	1,300	165,000	**166,300**	1,200
UKRAINE	1,600	89,700	**91,300**	500	500	95,000	**95,500**	800
TÜRKIYE	0	45,000	**45,000**	0	0	60,000	**60,000**	0
ROMANIA	1,200	42,400	**43,600**	100	100	48,000	**48,100**	300
FRANCE	0	35,000	**35,000**	0	0	40,000	**40,000**	0
IRAN	0	38,700	**38,700**	0	0	37,600	**37,600**	0
INDIA	3,500	28,000	**31,500**	3,000	3,000	30,000	**33,000**	3,000
ARGENTINA	0	22,000	**22,000**	1,000	1,000	25,500	**26,500**	1,300
SPAIN	0	17,000	**17,000**	0	0	20,000	**20,000**	0
MOLDOVA	100	18,400	**18,500**	100	100	19,500	**19,600**	200
PORTUGAL	0	12,000	**12,000**	0	0	13,000	**13,000**	0
ITALY	0	16,000	**16,000**	0	0	12,800	**12,800**	0
HUNGARY	0	11,900	**11,900**	50	50	12,100	**12,150**	100
OTHERS	0	25,500	**25,500**	0	0	23,600	**23,600**	0
WORLD TOTAL	**89,800**	**2,818,700**	**2,908,500**	**196,770**	**196,770**	**2,891,600**	**3,088,370**	**221,900**
WORLD CONSUMPTION (Supply-End. Stock)				**2,711,730**				

Estimated World Walnut Production, Kernel Basis · Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	8,800	660,000	**668,800**	44,000	44,000	704,000	**748,000**	53,000
USA	27,700	323,100	**350,800**	39,900	39,900	303,400	**343,300**	41,800
CHILE	185	85,000	**85,185**	605	605	76,700	**77,305**	558
UKRAINE	620	35,880	**36,500**	200	200	36,100	**36,300**	300
TÜRKIYE	0	18,000	**18,000**	0	0	24,000	**24,000**	0
ROMANIA	530	15,600	**16,130**	37	37	17,700	**17,737**	110
FRANCE	0	11,200	**11,200**	0	0	12,800	**12,800**	0
IRAN	0	15,900	**15,900**	0	0	15,400	**15,400**	0
INDIA	1,150	9,300	**10,450**	990	990	9,900	**10,890**	990
ARGENTINA	0	9,900	**9,900**	450	450	11,500	**11,950**	590
SPAIN	0	6,800	**6,800**	0	0	8,000	**8,000**	0
MOLDOVA	40	7,400	**7,440**	40	40	7,600	**7,640**	78
PORTUGAL	0	5,400	**5,400**	0	0	5,900	**5,900**	0
ITALY	0	7,200	**7,200**	0	0	5,800	**5,800**	0
HUNGARY	0	4,800	**4,800**	20	20	4,950	**4,970**	41
OTHERS	0	11,200	**11,200**	0	0	9,700	**9,700**	0
WORLD TOTAL	**39,025**	**1,226,680**	**1,265,705**	**86,242**	**86,242**	**1,253,450**	**1,339,692**	**97,467**
WORLD CONSUMPTION (Supply-End. Stock)				**1,179,463**				

Sources 2025/26: California Walnut Board and Commission, Chilenut, Walnut Growers Association of Türkiye, Portugal Nuts and other INC sources. Sources 2026/27: 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 May and June 2026.



Global Market. As discussed during the INC Congress in Macao, world peanut production has expanded steadily over the past decade, supported by parallel growth in demand. However, 2025 marked the first decline in global imports, raising concerns about slower consumption growth. The market has, therefore, shifted from concerns about excess supply to a tighter supply outlook.

Weather-related disruptions linked to El Niño have become a key driver of market developments. The phenomenon alters global weather patterns, typically bringing wetter conditions to parts of the Americas and drier weather to parts of Asia, contributing to lower production across several major origins. Lower demand earlier in the year initially weighed on planting decisions, and subsequent weather-related challenges further reduced crop prospects. Nevertheless, available supplies remain sufficient.

China. The 2026 crop acreage was expected to remain unchanged at approximately 4.4 million hectares, reflecting the stronger returns achieved by peanuts vs. competing crops—such as corn—during the previous season. However, El Niño could bring drought during the summer and autumn months, particularly in northern and northeastern producing regions. All in all, production was forecasted below the previous crop, between 16.4 and 17.4 million metric tons.

Demand for peanuts continues to be driven primarily by household consumption and the food service sector, both of which remain highly price sensitive. Although snacking experienced significant growth from the late 20th century through 2017-2018, demand has since remained relatively flat. Nevertheless, the industry sees opportunities to support longer-term consumption growth through greater consumer awareness of peanuts' nutritional and health attributes.

USA. Peanut acreage and production have been affected by both economic and weather-related factors. Widespread drought across the main producing regions impacted planting. As of June 30, the U.S. Department of Agriculture estimated the 2026 peanut planted area at 1.53 million acres (618,000 ha), a 22% decline from 1.95 M acres (790,000 ha) in 2025 and the lowest level in recent years. Harvested area was forecasted at 1.48 M acres (597,000 ha), compared with 1.91 M acres (771,000 ha) in 2025. The largest acreage reductions were reported in Georgia and Texas—the two largest producing states. By the end of June, 38% of the crop had reached the pegging stage, in line with the five-year average (37%) and well ahead of the previous week's 23%. Crop conditions remained generally favorable, with 62% rated good to excellent, compared with 60% a week earlier, although below 72% at the same time last year.

Higher production costs continue to pressure growers. Rising oil prices have contributed to higher synthetic fiber prices, strengthening, in turn, returns for cotton producers. As peanuts and cotton are commonly grown in rotation in the USA, the more attractive economics of cotton have encouraged some farmers to allocate additional acreage to that crop, reducing peanut plantings in certain regions. All in all, production was projected to decline from the previous season. Nonetheless, supplies were expected to remain adequate and quality prospects were favorable.

Demand remains uncertain, with weaker consumption of peanut butter and spreads. However, growing demand for organic, natural and clean-label products continues to support innovation and value-added peanut products.

Argentina. Harvest lagged well behind the normal pace. The combination of drought and heat during planting, which impacted crop establishment, and wet weather during harvest was expected to reduce production. Market conditions have also influenced planting decisions, with corn as a more attractive alternative in key peanut-producing regions.

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

Country	2025/2026				2026/2027			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	679	18,800	**19,479**	680	680	16,700	**17,380**	700
INDIA	348	7,500	**7,848**	403	403	7,750	**8,153**	503
NIGERIA	484	5,241	**5,725**	504	504	5,300	**5,804**	508
USA	709	3,257	**3,966**	1,283	1,283	2,733	**4,016**	1,192
ARGENTINA	89	1,895	**1,984**	120	120	1,312	**1,432**	0
BRAZIL	44	1,160	**1,204**	87	87	1,200	**1,287**	82
SUDAN	434	1,000	**1,434**	314	314	1,000	**1,314**	269
SENEGAL	320	940	**1,260**	320	320	940	**1,260**	320
INDONESIA	105	830	**935**	58	58	810	**868**	78
GHANA	37	600	**637**	37	37	600	**637**	37
VIET NAM	43	388	**431**	42	42	380	**422**	47
CÔTE D'IVOIRE	0	240	**240**	0	0	240	**240**	0
NICARAGUA	0	186	**186**	0	0	175	**175**	0
SOUTH AFRICA	18	84	**102**	15	15	80	**95**	18
MEXICO	29	79	**108**	29	29	75	**104**	30
OTHERS	729	10,037	**10,766**	724	724	10,176	**10,900**	430
WORLD TOTAL	**4,068**	**52,237**	**56,305**	**4,616**	**4,616**	**49,471**	**54,087**	**4,214**
WORLD CONSUMPTION (Supply-End. Stock)				**51,689**				

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

खजूर / تمر / 椰枣 / Dátil / Tâmaras / Datte / Hurma

The information contained herein was prepared between May and June 2026.

At the time of this report, 2026/27 production was forecasted at around 1.36 million metric tons, reflecting modest year-on-year increases across several key origins, while continued growth in consumption and trade was expected to balance supply. The market outlook remained influenced by geopolitical developments and trade policies. The situation in Western Asia continued to affect trade flows and sourcing decisions, particularly for date ingredients, with some buyers seeking alternative origins to secure supply. In Europe, consumption continues to expand beyond Ramadan, driven by growing demand for healthy, clean-label products and broader year-round retail availability.

Estimated World Table Date Production. Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
SAUDI ARABIA	115,000	290,000	**405,000**	120,000	120,000	295,000	**415,000**	120,000
EGYPT	22,000	190,000	**212,000**	23,000	23,000	195,000	**218,000**	22,000
UAE	44,000	170,000	**214,000**	44,000	44,000	175,000	**219,000**	45,000
TUNISIA	1,000	150,000	**151,000**	25,000	25,000	152,000	**177,000**	28,000
IRAN	7,000	130,000	**137,000**	7,000	7,000	130,000	**137,000**	8,000
ALGERIA	2,000	90,000	**92,000**	30,000	30,000	95,000	**125,000**	35,000
IRAQ	15,000	70,000	**85,000**	15,000	15,000	70,000	**85,000**	15,000
ISRAEL	1,000	60,000	**61,000**	1,000	1,000	65,000	**66,000**	1,000
MOROCCO	8,000	40,000	**48,000**	8,500	8,500	45,000	**53,500**	10,000
JORDAN	4,500	26,000	**30,500**	4,800	4,800	30,000	**34,800**	6,000
USA	11,000	25,000	**36,000**	11,000	11,000	27,000	**38,000**	12,000
PAKISTAN	6,000	25,000	**31,000**	6,000	6,000	26,000	**32,000**	6,500
OMAN	5,500	25,000	**30,500**	5,500	5,500	25,000	**30,500**	6,000
MEXICO	4,000	20,000	**24,000**	4,000	4,000	22,000	**26,000**	4,500
SUDAN	1,000	6,000	**7,000**	1,000	1,000	5,000	**6,000**	500
LIBYA	300	3,000	**3,300**	300	300	3,000	**3,300**	250
WORLD TOTAL	**247,300**	**1,320,000**	**1,567,300**	**306,100**	**306,100**	**1,360,000**	**1,666,100**	**319,750**
WORLD CONSUMPTION (Supply-End. Stock)				**1,261,200**				

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 May and July 2026.

Türkiye. As of this report, the Turkish dried apricot industry was expected to recover in 2026/27 from the exceptionally short 2025/26 crop. According to industry sources, Malatya's production capacity is expected to remain constrained by the structural damage caused by the 2025 freeze, with around 75-80% of trees remaining productive. Nevertheless, overall favorable weather and adequate rainfall supported fruit development, with larger fruit sizes and good quality anticipated. According to the Aegean Exporters' Association, year-to-date exports through June 27 amounted to 27,965 metric tons, down by 61% from last season.

Estimated World Dried Apricot Production. Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	45,000	2,000	**47,000**	2,000	2,000	75,000	**77,000**	5,000
IRAN	1,000	23,000	**24,000**	1,000	1,000	18,000	**19,000**	1,000
UZBEKISTAN	2,000	25,000	**27,000**	500	500	15,000	**15,500**	1,000
AFGHANISTAN	2,000	10,000	**12,000**	0	0	7,000	**7,000**	0
TAJIKISTAN	1,000	15,000	**16,000**	500	500	6,000	**6,500**	500
USA	0	2,700	**2,700**	0	0	4,500	**4,500**	0
CHINA	0	3,000	**3,000**	0	0	3,000	**3,000**	0
SOUTH AFRICA	0	1,330	**1,330**	0	0	1,340	**1,340**	0
OTHERS	0	5,300	**5,300**	0	0	5,000	**5,000**	0
WORLD TOTAL	**51,000**	**87,330**	**138,330**	**4,000**	**4,000**	**134,840**	**138,840**	**7,500**
WORLD CONSUMPTION (Supply-End. Stock)				**134,330**				

Sources 2025/26: Aegean Exporters' Association, Iran Dried Fruit Exporters Association, Dried Fruit South Africa, and other INC sources. Sources 2025/26: Aegean 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 May and June 2026.

At the time of reporting, US 2026/27 production was expected to increase. Canada was forecasted lower mainly due to lower volumes in eastern Canada. Chile was also anticipated to decline, reflecting the impact of hailstorms last November and a return to typical yields following a record crop the previous season.

Estimated World Sweetened Dried Cranberry Production. Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
USA	8,880	143,900	**152,780**	8,922	8,922	153,914	**162,836**	8,875
CANADA	2,765	49,700	**52,465**	2,734	2,734	40,920	**43,654**	2,161
CHILE & OTHERS	378	16,600	**16,978**	1,022	1,022	15,365	**16,387**	982
WORLD TOTAL	**12,023**	**210,200**	**222,223**	**12,678**	**12,678**	**210,199**	**222,877**	**12,018**
WORLD CONSUMPTION (Supply-End. Stock)				**209,545**				

Source: INC. The cranberry crop is harvested in the fall. End-of-year statistics are measured as of August 31. 2026/27 represents the estimate of production and supply through August 31, 2027.

Dried Figs



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

The information contained herein was prepared between May and July 2026.

Türkiye. The smaller-than-anticipated 2025/26 crop contributed to higher prices, while stricter export requirements and shipment delays reduced export competitiveness. As of this report, an earlier 2026/27 crop and shipments were expected well ahead of Christmas and the Chinese New Year to help recover market share. Good rainfall favored fruit development, with larger sizes anticipated.

Estimated World Dried Fig Production, Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	5,000	70,000	**75,000**	8,000	8,000	70,000	**78,000**	7,000
IRAN	8,000	32,500	**40,500**	3,000	3,000	30,000	**33,000**	5,000
AFGHANISTAN	0	25,000	**25,000**	0	0	15,000	**15,000**	0
SPAIN	1,200	10,200	**11,400**	0	0	12,200	**12,200**	0
USA	500	4,500	**5,000**	250	250	7,300	**7,550**	0
GREECE	300	5,500	**5,800**	0	0	5,500	**5,500**	0
ITALY	0	2,200	**2,200**	0	0	2,500	**2,500**	0
OTHERS	0	6,500	**6,500**	0	0	6,000	**6,000**	0
WORLD TOTAL	**15,000**	**156,400**	**171,400**	**11,250**	**11,250**	**148,500**	**159,750**	**12,000**
WORLD CONSUMPTION (Supply-End, Stock)				**160,150**				

Sources 2025/26: Aegean Exporters' Association, Iran Dried Fruit Exporters Association, Greek Nuts & Fruits Trade Association and other INC sources. 2026/27: Aegean Exporters' 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 May and June 2026.

Chile. China remains a key export market, with prune shipments rising from 5,000 metric tons in 2019 to 30,000 MT in 2025. Demand expanded across all fruit sizes. Around 15% of the crop continued to be marketed fresh.

USA. For 2026/27, production is forecasted at 68,000 MT following favorable bloom. High temperatures in March and June caused some sunburn and fruit drop, potentially reducing the forecasted tonnage in what looks to be a high-quality crop. Stable acreage and a balanced supply-demand support a positive outlook.

Estimated World Prune Production. Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
CHILE	4,920	81,000	**85,920**	14,000	14,000	83,000	**97,000**	8,000
USA	49,800	64,000	**113,800**	48,000	48,000	68,000	**116,000**	46,000
FRANCE	17,000	27,000	**44,000**	12,000	12,000	32,000	**44,000**	12,000
ARGENTINA	5,000	25,000	**30,000**	1,000	1,000	15,000	**16,000**	600
SERBIA	1,000	5,000	**6,000**	1,000	1,000	8,000	**9,000**	1,000
AUSTRALIA	0	3,000	**3,000**	350	350	2,800	**3,150**	400
ITALY	700	2,000	**2,700**	500	500	2,000	**2,500**	500
SOUTH AFRICA	0	560	**560**	0	0	780	**780**	0
WORLD TOTAL	**78,420**	**207,560**	**285,980**	**76,850**	**76,850**	**211,580**	**288,430**	**68,500**
WORLD CONSUMPTION (Supply-End. Stock)				**209,130**				

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. 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 May and July 2026.

Türkiye. The Turkish raisin industry has faced three consecutive short crops, an unusual situation that has contributed to a significant increase in prices, prompting some buyers to diversify sourcing origins. However, weaker sales have also been reported in alternative origins, suggesting that the issue extends beyond origin substitution and reflects broader consumption challenges.

For the 2026/27 season, prospects were, at the time of reporting, favorable, with expectations for a good crop. Frost risk had largely passed, although concerns remained regarding other weather- and disease-related risks. Previous short crops were not solely linked to frost but also to disease pressure.

As reported by the Aegean Exporters' Association, exports continued to lag behind the previous season. Between September 1, 2025, and June 27, 2026, exports totaled 118,349 metric tons, down 9% from 130,339 MT over the same period the previous year. However, export shipments strengthened during the last week of that period, with 2,962 MT shipped, up from 2,528 MT in 2024/25.

China. Production has remained relatively stable in recent years. As of this report, production was expected to reach approximately 200,000 MT in 2026, with green raisins accounting for around 60% of the output and red raisins representing the remaining 40%.

In recent years, the Chinese raisin industry has strengthened processing, product consistency and export capabilities, supporting a shift from low-cost supply towards higher-value products and diversified applications. Demand has been driven by healthy snacking trends and broader ingredient applications. However, rising production costs, climate-related uncertainty and increasingly stringent international regulations continue to challenge producers.

On the demand side, China remains a leading growth market for raisins, reflecting rising consumer interest in healthy, natural and convenient foods. Marketing efforts have focused on consumer education, product innovation and raisins' nutritional and clean-label attributes, while new packaging formats and snack and ingredient applications have broadened consumption opportunities.

South Africa. The South African raisin industry has more than doubled production over the past 15 years, increasing from approximately 40,000 MT in 2011/12 to around 100,000 MT currently. Growth has been supported by industry coordination across the value chain, investment in research and development, and plant improvement programs.

The industry comprises approximately 770 growers cultivating around 15,000 hectares, equivalent to an average yield of approximately 6.6 MT/ha of dried grapes. Productivity gains have been driven largely by the adoption of newer varieties planted over the last 15 years. The sector is also becoming increasingly concentrated among larger growers. Approximately 38-40 growers now produce more than 500 MT annually, with some operations exceeding 1,500 MT.

Australia. As reported by Dried Fruits Australia, a significant rain event at the start of harvest in early March affected what had initially been shaping up to be a good crop, initially estimated at around 18,500 MT. At the time of this report, some fruit had yet to be delivered to processors due to challenging drying conditions. While final production remained uncertain, delivered volumes were expected to total approximately 13,000 MT, with additional processing losses anticipated as a result of the weather during harvest.

Processors were working through the fruit, although processing and packing were expected to take some time. As the rain arrived late in the season, it was not expected to have a significant impact on next year's crop.

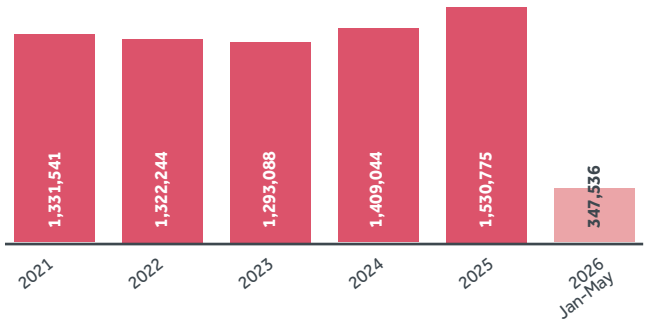
Estimated World Raisin / Sultana / Currant Production. Metric Tons

Country	2025/2026				2026/2027			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	30,000	164,000	**194,000**	10,000	10,000	290,000	**300,000**	30,000
CHINA	1,000	190,000	**191,000**	10,000	10,000	200,000	**210,000**	10,000
INDIA	20,000	140,000	**160,000**	5,000	5,000	200,000	**205,000**	7,000
IRAN	20,000	140,000	**160,000**	5,000	5,000	200,000	**205,000**	10,000
USA	58,000	172,000	**230,000**	70,000	70,000	160,000	**230,000**	60,000
UZBEKISTAN	11,200	97,000	**108,200**	5,000	5,000	100,000	**105,000**	10,000
SOUTH AFRICA	13,000	101,000	**114,000**	19,750	19,750	99,550	**119,300**	19,800
CHILE	2,000	63,000	**65,000**	12,000	12,000	58,500	**70,500**	5,000
ARGENTINA	1,000	51,600	**52,600**	2,000	2,000	53,500	**55,500**	2,000
AFGHANISTAN	1,000	20,000	**21,000**	2,000	2,000	20,000	**22,000**	5,000
GREECE	0	16,000	**16,000**	0	0	17,000	**17,000**	0
AUSTRALIA	200	18,560	**18,760**	200	200	13,000	**13,200**	200
OTHERS	0	18,000	**18,000**	0	0	21,600	**21,600**	0
WORLD TOTAL	**157,400**	**1,191,160**	**1,348,560**	**140,950**	**140,950**	**1,433,150**	**1,574,100**	**159,000**
WORLD CONSUMPTION (Supply-End. Stock)				**1,207,610**				

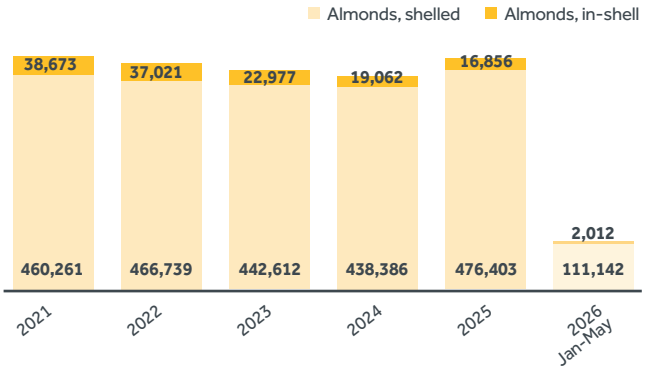
Sources 2025/26: Aegean Exporters Association, Iran Dried Fruits Exporters Association, Raisins South Africa, Dried Fruits Australia, 65th International Seedless Dried Grape Producing Countries Confrence and other INC sources. Sources 2026/27: Aegean Exporters Association, Raisins South Africa, Dried Fruits Australia 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). From 2025/26 onwards, Uzbekistan's includes Golden and Black raisins (i.e., all dried vine fruits), which explains the increase vs. previous years.

Special Report:
EU Import Market, Tree Nuts

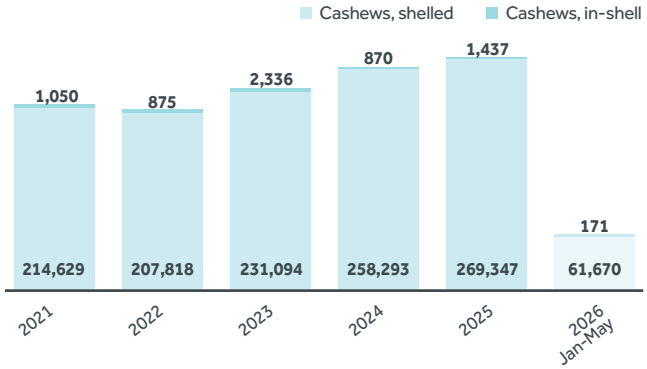
Total Tree Nut Imports (Metric Tons)



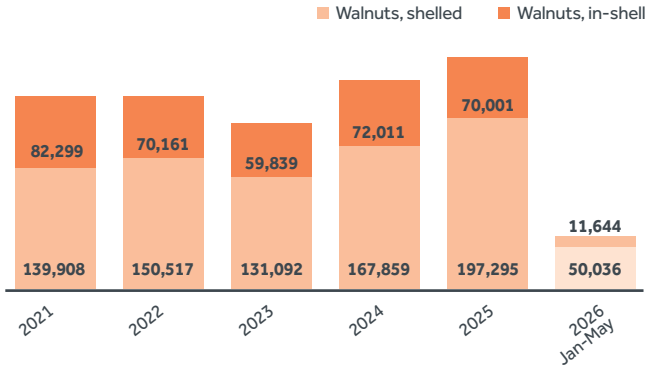
Almond Imports (MT)



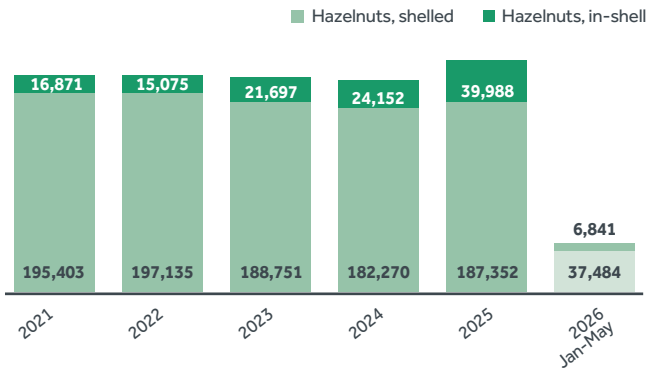
Cashew Imports (MT)



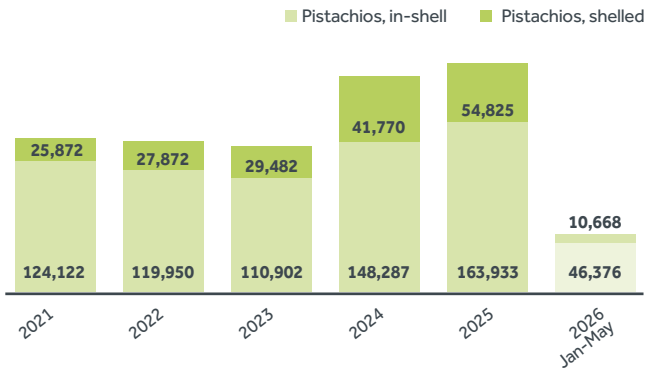
Walnut Imports (MT)



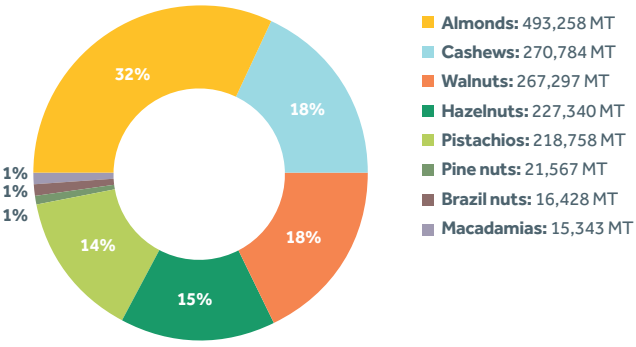
Hazelnut Imports (MT)



Pistachio Imports (MT)

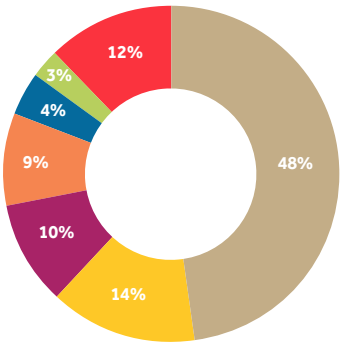


Market Share by Products (2025)



- **Almonds:** 493,258 MT
- **Cashews:** 270,784 MT
- **Walnuts:** 267,297 MT
- **Hazelnuts:** 227,340 MT
- **Pistachios:** 218,758 MT
- **Pine nuts:** 21,567 MT
- **Brazil nuts:** 16,428 MT
- **Macadamias:** 15,343 MT

Market Share by Country of Origin* (2025)



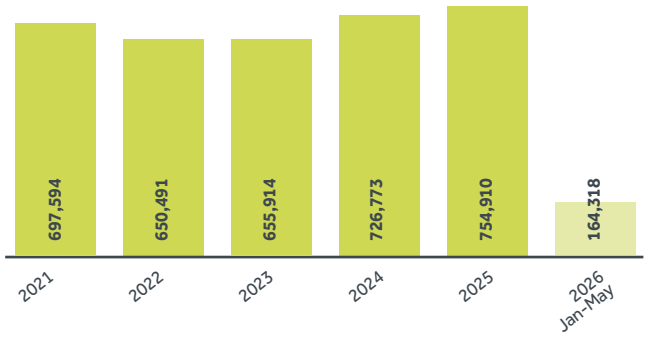
- **USA:** 498,176 MT
- **Viet Nam:** 145,814 MT
- **Chile:** 99,056 MT
- **Türkiye:** 98,135 MT
- **China:** 40,050 MT
- **Côte d'Ivoire:** 33,817 MT
- **Others:** 129,907 MT

* Intra-EU trade not included.

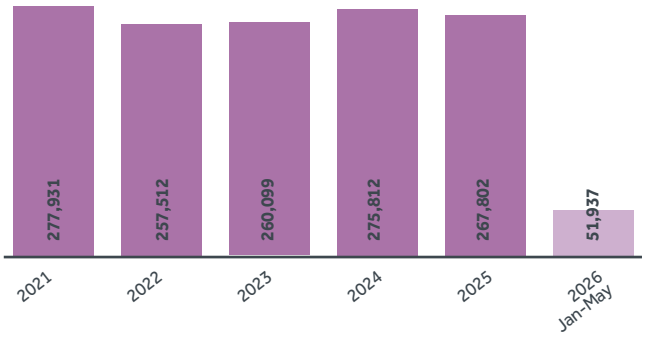
Source: Eurostat, imports into EU27.

Special Report:
EU Import Market, Dried Fruit

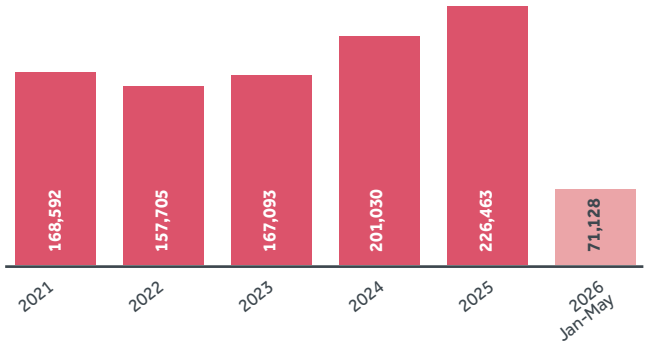
Total Dried Fruits Imports (MT)



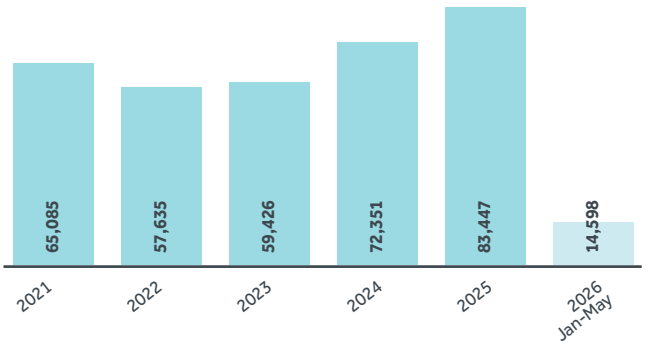
Dried Grape Imports (MT)



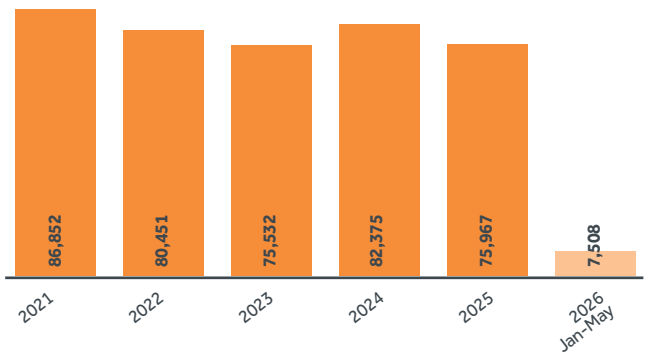
Date Imports (MT)



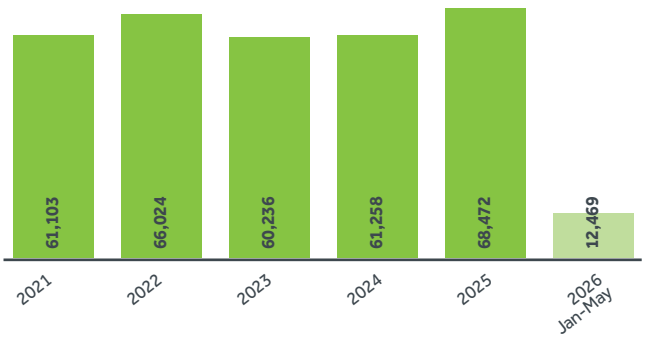
Dried Cranberry Imports (MT)



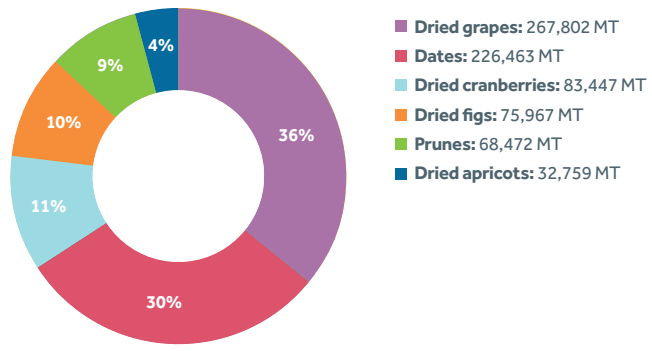
Dried Fig Imports (MT)



Prune Imports (MT)

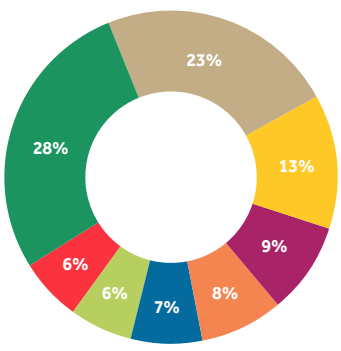


Market Share by Products (2025)



- **Dried grapes:** 267,802 MT
- **Dates:** 226,463 MT
- **Dried cranberries:** 83,447 MT
- **Dried figs:** 75,967 MT
- **Prunes:** 68,472 MT
- **Dried apricots:** 32,759 MT

Market Share by Country of Origin* (2025)



- **Türkiye:** 125,522 MT
- **Tunisia:** 71,932 MT
- **Chile:** 48,614 MT
- **South Africa:** 44,153 MT
- **Iran:** 40,694 MT
- **Algeria:** 34,275 MT
- **USA:** 31,075 MT
- **Others:** 150,326 MT

* Intra-EU trade not included.

Source: Eurostat, imports into EU27.



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Recovery in Global Raisin Production Signals Need for Demand Growth



Photo: Raisins South Africa.

The global raisin industry is entering a phase of recovery, with finalised 2025/26 figures and early 2026/27 estimates pointing to a notable rebound in production, particularly in the Northern Hemisphere, setting the stage for a critical year in aligning supply growth with demand expansion globally.

The raisin marketing year follows a distinct global rhythm, with Southern Hemisphere harvests dominating the first half and Northern Hemisphere production shaping supply in the latter half. As reported at the INC Congress in May, estimates for Southern Hemisphere countries are largely based on actual deliveries, while Northern Hemisphere figures remain projections subject to climatic variability.

Data from 2025/26 shows a slight decline in Southern Hemisphere production, yet overall supply has remained stable due to carryover stocks. This balance has cushioned reduced output and maintained market continuity. Notably, consistent supply from key origins has reinforced the importance of reliability and quality in sustaining global trade flows.

Looking ahead, 2026/27 projections indicate a strong recovery across major Northern Hemisphere producers. Türkiye is expected to lead, followed by China, India and Iran, with a combined increase of approximately 256,000 metric tons, or 40% year on year. Global production is therefore forecast to rise by 22%, from just under 1.2 million MT to over 1.4 million MT.

This recovery places clear responsibility on the industry to ensure demand grows in parallel with supply. Collaborative action will be essential. Stimulating consumption requires unified messaging that positions raisins as a convenient, natural and nutrient-dense snack aligned with health and wellness trends. Coordinated campaigns across regions can amplify this value proposition and reach new consumer segments.

Expanding market access is equally important. Industry stakeholders must work together to strengthen trade relationships, reduce barriers and improve logistics to unlock growth in emerging markets. At the same time, innovation in product applications—from snack formats to bakery, cereals and plant-based foods—can create new consumption opportunities.

Promoting the nutritional and functional benefits of raisins remains central to these efforts. Their natural sweetness, fibre content, antioxidants and long shelf life make them attractive to both consumers and manufacturers seeking clean-label ingredients. Increasingly, buyers are also prioritising consistency, traceability and low-residue production, reinforcing the value of origins that can reliably meet stringent market requirements.

In this context, dependable supply partners with strong quality credentials will play an increasingly important role in supporting global demand growth. Origins that combine production stability with a focus on food safety and minimal residue levels are well positioned to meet evolving buyer expectations.

Ultimately, the success of the coming season will depend not only on production volumes, but on the industry's collective ability to translate increased supply into sustainable demand growth.

In Memoriam



Peter Kuilman participating in the Raisins South Africa sponsored panel session at the INC Congress in Macao.

The raisin industry lost a respected leader with the passing of Peter Kuilman, CEO of RedSun Raisins, in June. Peter's vision, integrity, and dedication to the growth of the South African raisin sector left a lasting impact on colleagues, growers, and partners across the industry.

A Simple Snack Swap That Fits Real Life

AMBER WILSON, MS, RD

Senior Director, Global Nutrition & Marketing, North America, American Pistachio Growers



Photo: American Pistachio Growers.

A recent analysis used data from Mexico's National Health and Nutrition Survey to model how everyday diets might change when common energy-dense snacks are replaced with pistachios.

A new study[1] published in the journal *Nutrients* looked at how everyday diets in Mexico might change if people chose pistachios instead of common snack foods like sweet or salty packaged snacks.

Using national data from Mexico's National Health and Nutrition Survey (ENSANUT), researchers examined what could happen when pistachios replaced typical snacks rather than being added on. The results suggest that this simple swap could make a meaningful difference in the overall balance of the day.

When pistachios took the place of common snacks, the modeled diets included less added sugar and sodium, along with more protein and fiber, and more vitamins and minerals. Overall diet quality also improved, especially among children and adolescents. Importantly, these changes were seen when pistachios were used as a replacement, highlighting the value of small, realistic swaps.

The takeaway is not about changing everything at once. It's about one simple choice at snack time that fits into real life.

"New analysis suggests that replacing common sweet or salty snacks with pistachios can help improve the balance of everyday eating."

A Practical Message For Everyday Snacking

Snacking plays a big role in daily eating patterns in Mexico. This research adds to growing evidence that what we choose for snacks matters, and that small, realistic changes, like choosing pistachios instead of sweet or salty snacks, can help improve the nutrient mix of the day without overcomplicating eating habits.

About the Study

This research was a nutrition modeling analysis, not a clinical trial. It used data from ENSANUT 2012 and 2016 to explore hypothetical snack replacement scenarios. The study did not measure health outcomes, and results depend on replacing other snacks with pistachios rather than adding extra food. This study received funding from American Pistachio Growers grants to the Universidad Popular Autónoma del Estado de Puebla (UPAEP) and the University of Washington.

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Reference: 1. Velázquez, A. M., Rodríguez-Ramírez, S., Gómez, A. E. P., Medina-Zacarias, M. C., Martínez, L. M., & Drewnowski, A. (2025). Dietary Benefits of Pistachio Consumption in Mexico Modeled Using National Health Survey System (ENSANUT) 2012 and 2016 Data. *Nutrients*, 17(23), 3767.

California Almond Industry Shows Strong Adoption of Regenerative Farming Practices

California almond growers are already widely implementing regenerative farming practices, according to a new analysis from the Almond Board of California (ABC). Summarized in a factsheet released last December and a new report in May, the analysis provides one of the most comprehensive looks to date at how regenerative agriculture principles are being applied in a large-scale perennial crop system.

While regenerative agriculture lacks a single, universal definition, it is generally centered on improving soil health, enhancing biodiversity, strengthening ecosystems and supporting long-term farm viability. For almond production, SureHarvest and ABC evaluated regenerative frameworks from RegenScore, the Sustainable Agriculture Initiative (SAI) Platform, and the California Department of Food and Agriculture to identify practices relevant to perennial orchard systems.

Using data from the California Almond Stewardship Platform (CASP), the analysis reviewed grower self-assessments from approximately 4,500 unique orchards between 2020 and 2024, representing roughly 275,000 assessed acres annually in recent years. Based on this review, researchers identified five regenerative farming categories and 20 specific practices applicable to California almond orchards.

One of the key findings is the breadth of current adoption. Nearly all assessed almond orchards reported using six or more regenerative practices across five categories, including soil health, biodiversity, water, input efficiency and community, with 80 percent indicating they are implementing 11 or more. Adoption is well distributed across categories, with 75 percent of orchards reporting at least one practice in each regenerative category.

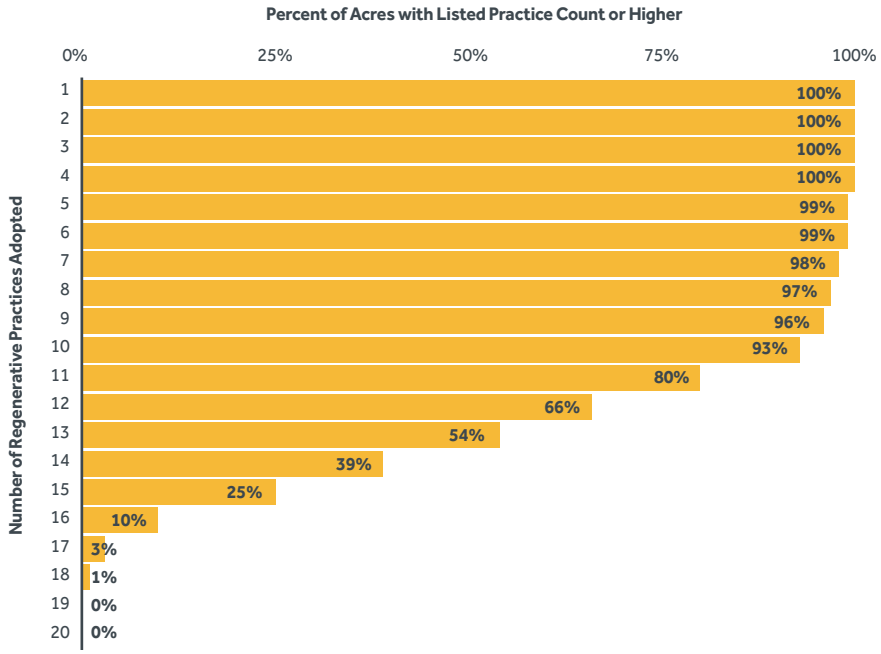
Several practices show particularly strong uptake. From 2020 to 2024, eight regenerative practices were adopted in more than 90% of orchards, and three practices increased by at least five percentage points over that period. Some of the most commonly adopted practices include: reduced passes, reduced wind erosion, integrated pest management, energy conservation, microirrigation and optimized nutrient management. There was also evidence of increased trends in the areas of pollinator habitat, hedgerows and the use of renewable energy (primarily solar). Some regenerative principles such as maintaining living roots year round are inherently supported by almond production because it is a perennial cropping system.

> *"Nearly all assessed almond orchards reported using six or more regenerative practices across five categories."*

While adoption levels are generally high, opportunities remain to expand and refine regenerative outcomes over time. By documenting where growers are today, the analysis provides a baseline for tracking future progress, informing policy discussions, and supporting market conversations around environmental claims in the almond industry.

Industry leaders say the findings reinforce that many almond growers are already utilizing key regenerative practices, often without labeling it as such. For California almonds, there are strong pathways for continued improvement aligned with environmental, economic and operational goals.

Regenerative agriculture practice adoption (2020-2024), cumulative % of acres.



For more information, scan the QR code:

Chilean Walnuts: 2026 Harvest Overview

Following a large walnut crop in 2025, the 2026 season concluded as projected, with an early harvest in the south and a normal harvest in central Chile. Production rebounded in the south, while the central region saw a slight adjustment. Quality indicators were strong, with particularly good internal condition and a predominance of medium-sized nuts.



Photo: Chilenut.

Following a 2025 season marked by high production—totaling 182,771 metric tons (in-shell basis)—Chile consolidated India, Germany, Italy, Türkiye and the United Arab Emirates as its main export markets. Shipments totaled 174,845 MT (in-shell equivalent), comprising 91,638 MT of in-shell walnuts and 83,249 MT of shelled walnuts (in-shell equivalent), with 4% destined for the domestic market and 1% held in stock. Meanwhile, the area planted with walnut trees in Chile reached 41,722 hectares, reflecting a 3.5% decrease compared to 2024.

The 2026 harvest concluded during the first week of May, in line with projections, although with some variations compared to a typical season, particularly in the timing of both the start and end of the harvest. In the southern region, rainfall ahead of the harvest helped trigger hull opening, bringing the start of operations forward by 5 to 7 days compared to normal. In the central region, the Chandler harvest began as usual during the first weeks of April, and the absence of rainfall allowed for a more extended harvesting window with less pressure on the hulling and drying facilities.

Regarding the main growing areas, the southern region—which includes Maule, Ñuble, Biobío and Araucanía—saw a rebound in output as a result of favorable spring weather, in contrast to the poor results of the 2025 harvest. Meanwhile, the central region experienced a production adjustment following a highly productive 2025, which largely explains last year's overall increase in Chilean output, given the significant weight of the Metropolitan Region within the country's planted area. As for key quality parameters, at the time of reporting, internal condition appeared strong, with a good proportion of Extra Light colors and yields similar to or better than last year. In terms of sizing, a normal distribution was observed, with a higher share of medium calibers and a lower proportion of large ones.



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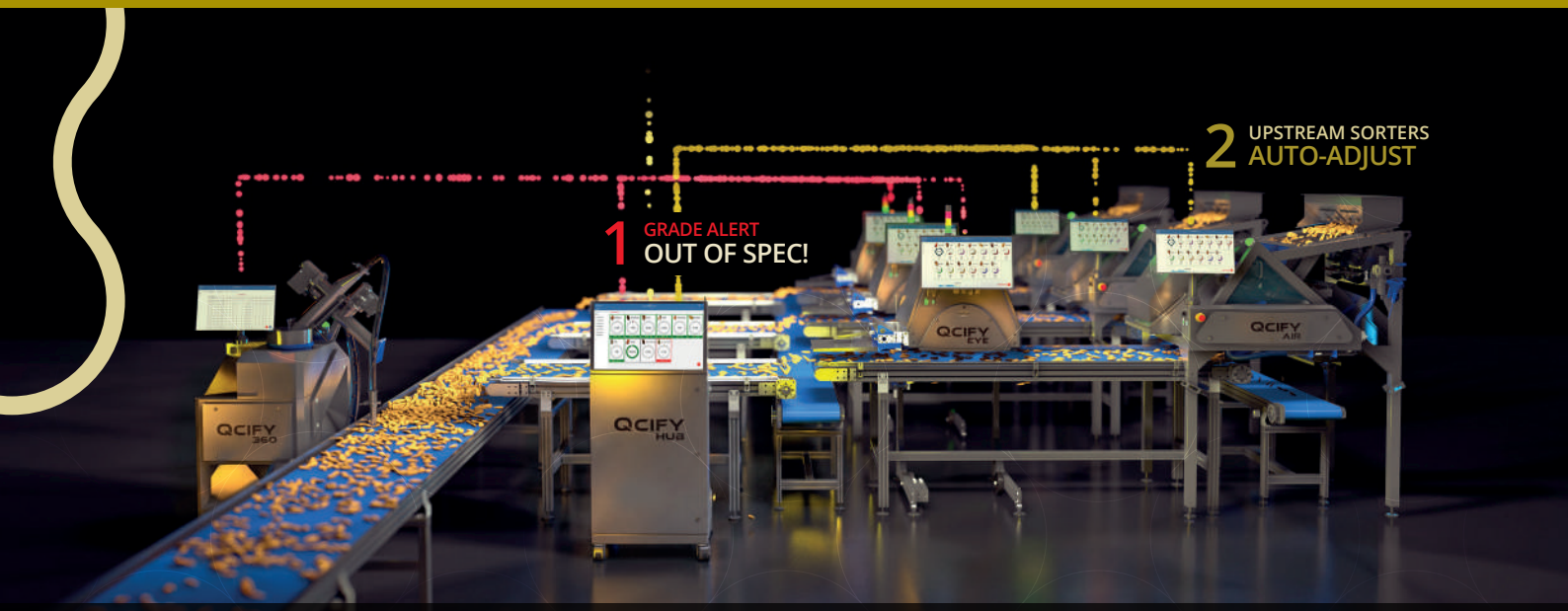


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