NUTFRUIT

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

Edition 94. N° 1 **March 2025**

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May 8-10, 2025
Palma de Mallorca, Spain

The Mediterranean Beckons: Be Part of the Industry's Most Eagerly Anticipated Event

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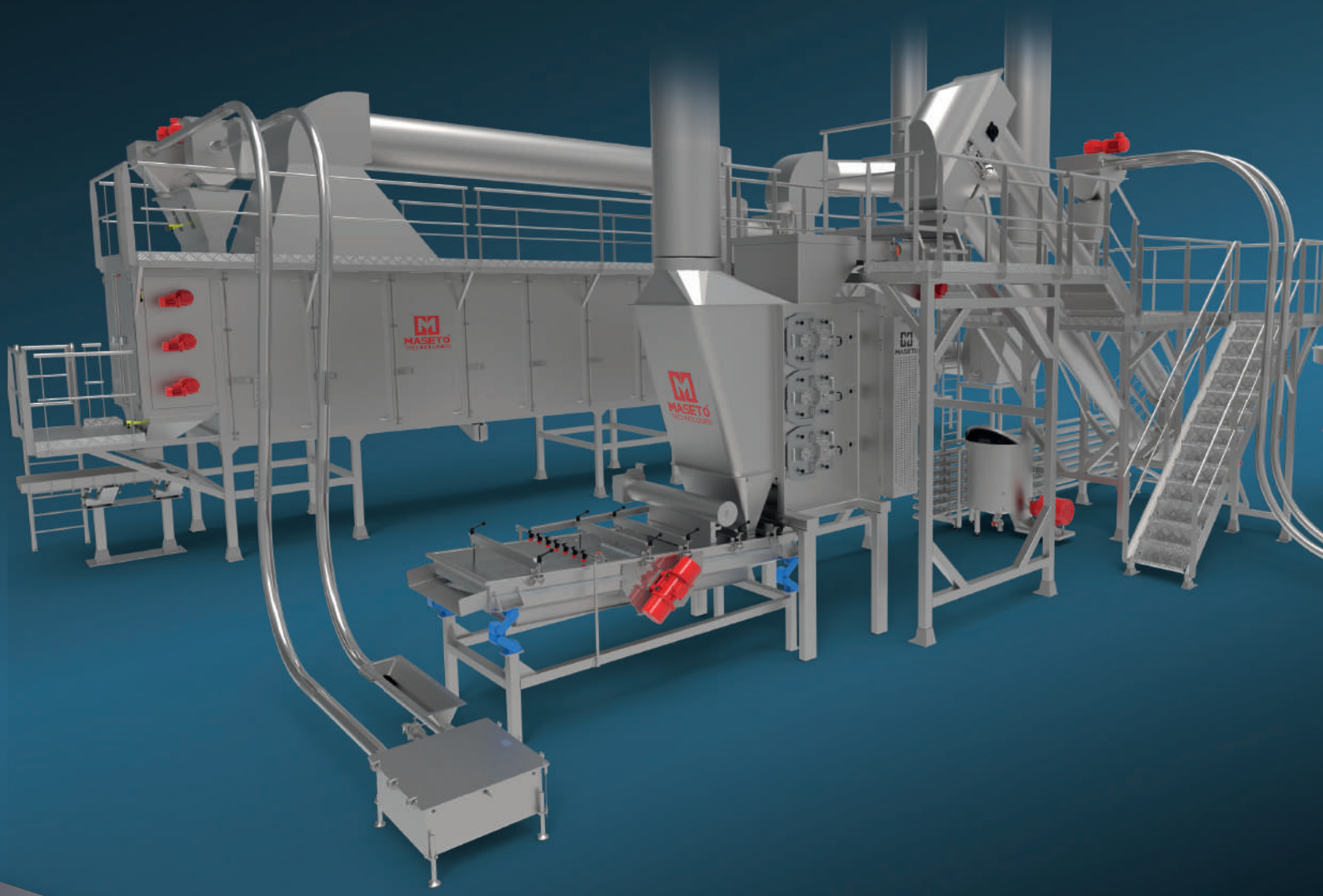

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NUTFRUIT
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Edition 94. N°1 **March 2025**

The INC is the international umbrella organization for the nut and dried fruit industry and the source for information on health, nutrition, statistics, food safety, and international standards and regulations regarding nuts and dried fruits.

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Navigating the Road Ahead With Confidence

MICHAEL WARING
INC CHAIRMAN

As the first quarter of 2025 nears to a close, the nut and dried fruit industry continues to demonstrate strength and adaptability in the face of evolving global challenges. While trade barriers, climate challenges, logistics hurdles, and macroeconomic pressures remain important concerns, the industry has also seen promising demand trends, particularly in emerging markets. Now, more than ever, our focus must be on sustaining this growth, increasing efficiency, and capitalizing on opportunities to expand consumption worldwide.

At the heart of these efforts is the INC's ongoing work to support and connect the global nut and dried fruit industry. The Executive Committee recently convened to review our progress and set the course for the months ahead. Key discussions included the imminent launch of the INC Sustainability Institute, set to debut at the INC Congress this May, the continuation of the Country Outreach Program, and the Multi-Country Dissemination Plan in China, India, and Latin America. Other focus points were the latest developments regarding the upcoming INC Congress in Mallorca, as well as future INC events that will bring the industry together in meaningful and productive ways. Additionally, we examined the 2024 end-of-year accounts, ensuring that the INC remains in a strong financial position to continue its mission.

In February, we saw great success at the INC Pavilion at Gulfood 2025, which served as a premier platform for our members. With a dynamic group of co-exhibitors representing a diverse array of countries, the INC Pavilion reaffirmed its status as a hub for business, networking, and showcasing the industry's latest innovations. This event demonstrated the power of our global presence and our commitment to fostering connections that drive industry growth.

Looking ahead, the spotlight now turns to the 2025 INC Congress, set to take place from May 8-10 in the stunning Mediterranean setting of Mallorca, Spain. This flagship event will bring together industry leaders from around the world for three days of invaluable insights, strategic discussions, and high-level networking. The Congress remains the premier opportunity to engage with key stakeholders, share knowledge, and shape the future of our sector. I encourage all members to join us in Mallorca for what promises to be an exceptional gathering.

In addition to the Congress, I encourage you to explore two essential INC publications that provide in-depth analysis and industry data. The 2024 Annual Report is publicly available on the INC website and offers a comprehensive review of the INC's initiatives and achievements over the past year. I highly recommend reading this document to gain insight into the work we've undertaken to support and advance our industry.

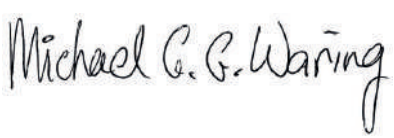
Meanwhile, the 2024 Nuts & Dried Fruits Statistical Yearbook is available exclusively in the members' area of the website. This invaluable resource offers detailed information on global production, trade, and consumption trends. Access to the Statistical Yearbook is a key benefit of INC membership, and I encourage members to make full use of this data-driven tool to inform their business strategies.

As I enter my final months as INC Chairman, I want to express my appreciation for the unwavering support of our members to this significant foundation that is "INC". Member engagement and contribution continues to be instrumental in driving our success, our programs and networks. I take this opportunity to thank the Board of Trustees for their continued stewardship.

To INC Executive Director Goretti Guasch and her team in Reus. It has been an absolute privilege to work with you all at this capacity and to have experienced your professionalism first hand. The drive from Reus, and in the execution of the INC agenda makes our foundation relevant, progressive and insightful. INC headquarters provides an invaluable resource for our sector. A resource that is recognised globally. The nut and dried fruit industry continues to benefit from your leadership and skill base. On behalf of all in the business please know that you are valued greatly.

The future of the nut and dried fruit sector is bright. Together, we will continue to navigate challenges, embrace opportunities, and champion a sustainable, thriving industry. I look forward to seeing you all in Mallorca as we take the next steps of this journey together. I wish my successor the very best in the years to come and I look forward to my continued involvement in our Foundation.

Kind regards,



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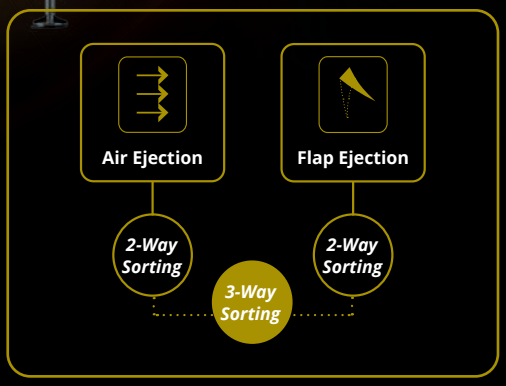

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Beyond Membership:

INC's Role in Fuelling the Sustainable Growth of the Industry

GORETTI GUASCH
INC EXECUTIVE DIRECTOR

The INC is at the forefront of driving growth, sustainability, and innovation within the nut and dried fruit industry. With a long-standing commitment to the sector, the INC not only boosts its members' growth through activities such as the INC Pavilion and Congress but also advocates for the industry's overall development through initiatives that encourage consumption, support market access, and promote sustainability with the ultimate goal to balance supply and demand.

One of the primary ways the INC fosters industry growth is through investment in research and dissemination campaigns. In 2024, the INC-funded NUTPOOL study launched. To recall, through an extensive meta-analysis involving over one million people across the globe, this groundbreaking study aims to fill current knowledge gaps and evaluate the associations between nut consumption and the prevention of different non-communicable diseases and mortality. The findings will provide essential data to guide the industry, policymakers, and health professionals in understanding the full health potential of nuts with the aim to gain a health claim for nuts. Such a claim would significantly boost consumption by providing consumers with credible, scientifically backed information about the health benefits of these foods. The project is on track to reach its goal of one million participants, and I look forward to updating on its progress.

Furthermore, as part of our commitment to advancing research on the health benefits of nuts and dried fruits, the INC brings together leading global scientists in this field. Building on the success of the NUTS 2022 scientific gathering, the INC will host NUTS 2025 from October 9-10, 2025, at the INC Headquarters. The event will feature 26 experts presenting the latest research on nut and dried fruits. New topics will include the impact of nuts on depression, immune function, renal health, and nutraceuticals, along with updates on the NUTPOOL study.

Beyond scientific research, the INC is also committed to raising awareness of the benefits of nuts and dried fruits on a global scale. Our Multi-Country Dissemination Plan, launched in 2022, promotes nut and dried fruit consumption in China, India, and Latin America. By 2024, these campaigns reached over 467 million Gen Z individuals and generated more than 10.4 million social media engagements. With a four-year duration, these campaigns create lasting impact while adapting to the unique needs of each market. Another major component of this effort is the INC's recipe campaign, which has gained traction online by making nuts and dried fruits both delicious and visually appealing. With 160 recipes and over 44 million views across Instagram, TikTok, YouTube, and Facebook, the campaign encourages easy, nutritious meal options.

Key to balancing supply and demand, as part of our Country Outreach Program, the INC plays a proactive role in monitoring global regulations and standards, working with governments, industry stakeholders, and key organisations to protect the sector's interests and open new markets. In 2024, the Country Outreach sub-committee undertook visits in Latin America and Rome, holding meetings with the FAO in both locations. This activity strengthens engagement with governmental bodies to address industry challenges, promote the INC World Declaration of Nuts and Dried Fruits, and advocate for increased consumption to support global health and sustainability. There are key collaborations in the pipeline for this year and I hope to divulge more information shortly.

Sustainability lies at the core of these initiatives, ensuring that industry growth is aligned with responsible environmental and social practices. The INC is steadfast in its commitment to securing a sustainable future for the sector, guided by the principles of the INC Manifesto and the United Nations Sustainable Development Goals. As previously highlighted in INC publications, 2025 will see the launch of the INC Sustainability Institute, which aims to shape the industry's sustainability agenda and serve as the global hub for best practices across the sector. By embedding sustainability into its initiatives, the INC not only strengthens industry resilience today but also fosters long-term growth while contributing to a healthier planet for generations to come.

Through its multifaceted approach, the INC is not only supporting its members but also driving the industry toward a sustainable and prosperous future. By investing in consumer awareness, sustainability, scientific research, and industry collaborations, the INC is ensuring that nuts and dried fruits are recognised as essential components of a healthy diet worldwide.

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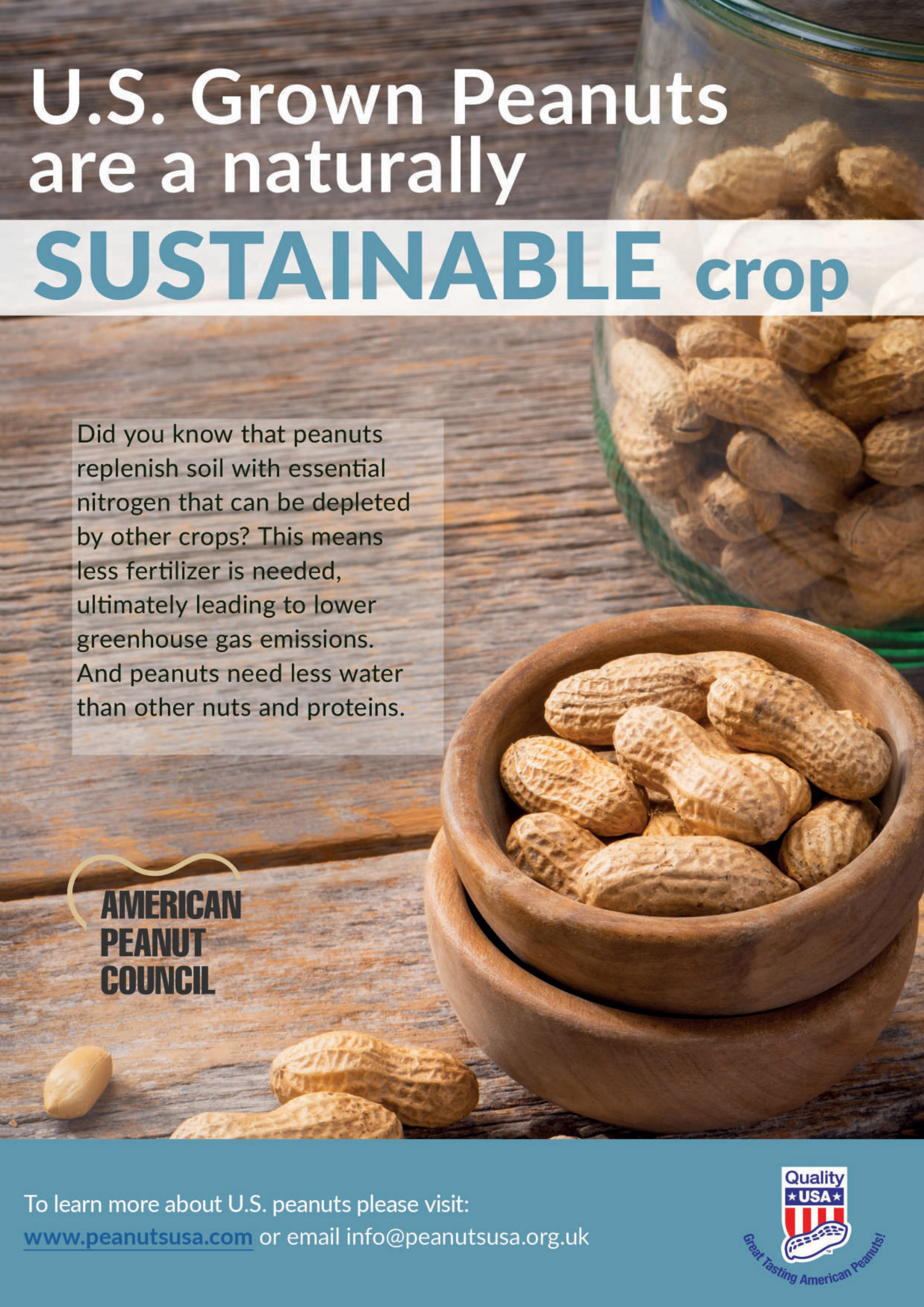

Did you know that peanuts replenish soil with essential nitrogen that can be depleted by other crops? This means less fertilizer is needed, ultimately leading to lower greenhouse gas emissions. And peanuts need less water than other nuts and proteins.

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Treehouse California Almonds and Sitos Group to Launch US$9 Million Biochar Facility

"The facility will be the West Coast's first commercial biochar project tied to agriculture."

Treehouse California Almonds has partnered with Sitos Group to develop a US$9 million slow-pyrolysis biochar facility in Delano, California, marking the West Coast's first commercial biochar project tied to agriculture. Expected to be operational by late 2025, the 2,300 m^2 facility will convert almond shells into biochar, promoting regenerative agriculture and carbon removal. Biochar application improves soil health, enhances moisture retention, and reduces the need for chemical fertilizers, offering sustainable waste management for almond growers. The facility will process more than 2.7 metric tons of almond shells per hour using three slow-pyrolysis units and an integrated system to convert excess heat into clean electricity. Treehouse California Almonds President Mark Masten called this initiative a "tremendous advancement" in climate-smart farming, while Sitos Group CEO Mayo Ryan described it as a key step toward a circular economy.

Saudi Arabia's SALIC to Obtain Majority Stake in Olam Agri

Saudi Agricultural and Livestock Investment Company (SALIC), which is wholly owned by Saudi Arabia's Public Investment Fund, has agreed to acquire a 44.58% stake in the Olam Group's agricultural business, Olam Agri, for US$1.78 billion, increasing its total stake to 80.01%. The deal, which will give SALIC full control within three years, values Olam Agri at US$4 billion. This acquisition supports Saudi Arabia's strategy to secure food supply chains and reduce reliance on imports. The transaction reflects SALIC's broader goals of diversifying essential commodity sources, particularly in the global grains sector. Olam Group Limited (OGL) will continue to hold a 100% interest in ofi (Olam Food Ingredients) and the Remaining Olam Group. OGL CEO Sunny Verghese commented: "The sale of Olam Agri to SALIC marks another key milestone in Olam's reorganization journey announced in January 2020. With this transaction, we can now focus our attention on seeking strategic options to unlock value for the Remaining Olam Group businesses and ofi, including the pursuit of an ofi IPO."

Construction of New Cashew Processing Plants Underway in Cambodia

Cambodia's cashew industry is set for significant growth with the construction of a new processing facility in Kampong Thom province, according to the Phnom Penh Post. The locally owned company Unique Noble Trading Co Ltd broke ground in December 2024 on a large-scale project that includes a cashew processing plant, an oil extraction facility, a fertilizer production unit, and a factory for manufacturing cashew processing machinery. The facility, spanning 20 hectares, is expected to begin operations in 2025, processing between 5,000 and 12,000 metric tons of cashews annually and creating around 400 jobs. Provincial officials and industry leaders see the investment as a key step in expanding Cambodia's cashew sector. Further enhancing Cambodia's cashew processing capacity, another factory by CSNC Agriculture Co Ltd, a US$12 million joint Cambodia-Singapore investment, is also set to open in Kampong Thom province in early 2025.

Alica Rockwell Named New Board Chair for Almond Board of California

The Almond Board of California has elected Alicia Rockwell as its new board chair. Rockwell, who serves as Chief Government and Public Affairs Officer at Blue Diamond Growers, took over the role on January 1, 2025, succeeding Alexi Rodriguez, who has moved into a new role as CEO of the Almond Alliance. Joining Rockwell in leadership, Brandon Rebiero, co-founder of Gold Leaf Farming, was elected as vice-chair of the board. "I'm honored to have the trust of my fellow board members," commented Rockwell. "The board is a strong group of experienced and impressive individuals who care deeply about our industry. Together, we will continue to address industry challenges and build a prosperous future for the California almond industry."

Caltech Opens Resnick Sustainability Center for Environmental Innovation

Photo: Caltech.

Caltech has officially opened the Resnick Sustainability Center (RSC), a cutting-edge research hub dedicated to tackling global environmental challenges. The 79,500-square-foot project was made possible by a US$750 million gift from the Lynda and Stewart Resnick through their foundation and The Wonderful Company. Designed for interdisciplinary collaboration, the RSC will advance research in energy, resource utilization, and environmental science while integrating sustainability into Caltech's curriculum. Starting with the class of 2028, all first-year students will take introductory chemistry labs in the new center, fostering hands-on learning from day one. Built to achieve LEED Platinum certification, the facility incorporates solar energy systems, sustainable architecture, and efficient resource use. Calling it a "beacon of bold thinking," Stewart Resnick emphasized its role in shaping future sustainability leaders. With the RSC now fully operational, Caltech is poised to make lasting contributions in the global fight against climate change.

Calconut Invests €15 Million in New Facility to Boost Production

Spanish nut company Calconut will invest €15 million in a new 10,000 m^2 facility to expand its production capacity by 10,000 metric tons. According to Food Retail & Service, construction will begin in June 2025, with operations set to start in 2027. With this expansion, Calconut will increase the total footprint of its facilities to 25,000 m^2. The new site, located in the Riodel industrial park in Alicante province, will cater to growing demand in retail markets. The expansion will create 105 new jobs in technical, logistics, and operational roles. The expansion aligns with Calconut's 2025-2030 Strategic Plan, which sets the goal of surpassing €500 million in revenue.

Major Macadamia Processing Facility in Australia Backed by Local Government

Plans for a major new macadamia processing facility in Queensland, Australia, have received the backing of a key local government body. In late 2024, Bundaberg Regional Council approved a key infrastructure charges discount for a facility proposed by Australian Premium Macadamias, according to the official outlet Bundaberg Now. The AU$15 million development is set to significantly boost the region's agricultural and industrial sectors. The facility will be built in two stages. Stage 1, to be completed in 2025, will feature a 2,712 m^2 facility for cleaning, drying, sorting, and packing macadamias. Stage 2, set for 2026, will expand the facility by an additional 2,640 m^2. The project is expected to process 9,800 metric tons of macadamia nuts annually, employing up to 18 staff daily during peak periods. Under the Projects of Regional Significance program, the project qualifies for a 50% discount on applicable infrastructure charges, provided development is completed by September 30, 2027.

American Peanut Council Names Anne-Marie DeLorenzo New Board Chair

The American Peanut Council has appointed Anne-Marie DeLorenzo, Senior Strategic Sourcing Manager at Mars Wrigley, as chair of its Board of Directors for 2025, succeeding Georgia grower Donald Chase. DeLorenzo brings over 30 years of experience with Mars, Inc., specializing in peanut sourcing. "I am honored to be the chairwoman of the American Peanut Council, an organization that represents one of America's most cherished and versatile crops," commented DeLorenzo. "Together, we will continue to champion sustainability and the global appreciation of peanuts, while supporting the farmers, manufacturers and communities that make this industry thrive." The 2025 board also includes Clint Piper of Golden Peanut as vice-chair and Collins McNeill of M.C. McNeill & Co. as secretary/treasurer.

JULIEN ROYER

CHEF-OWNER OF ODETTE AND CLAUDINE
FRANCE/SINGAPORE

Julien Royer is the culinary visionary behind Odette, a three-Michelin-starred restaurant located within the iconic National Gallery Singapore. Born into a family of fourth-generation farmers in France, Royer's childhood experiences foraging and harvesting sparked his lifelong appreciation for nature's bounty. This philosophy of authenticity, respect for ingredients, and seasonality underpins his cooking style. His career has spanned prestigious kitchens, including that of the legendary Michel Bras, and has taken him across the world to locations like the French West Indies and London before arriving in Singapore in 2008. At Odette, his dedication to sourcing exceptional produce and fostering relationships with boutique suppliers shines through. Widely recognized for his modern take on French cuisine, he is passionate about mentoring future talent and sharing his expertise on global platforms. He also helms Claudine, a French neo-brasserie in Singapore, and Louise, a Michelin-starred bistronomy-style restaurant in Hong Kong.

Photos: Odette Restaurant.

Your culinary journey has taken you across the globe. How have these experiences shaped your approach to French cuisine?

I used to cook only classic French cuisine using only French products, but life here at the crossroads of Southeast Asia gave me a renewed perspective —I worked closer with our terroir, exploring native ingredients, rare varieties of citrus and spice around the region, and sourcing from farms right here in Singapore who grow us many vegetables, flowers, and herbs. Our cuisine at Odette remains French in DNA, but over the years, my approach has evolved considerably to infuse a sense of place, marrying the principles of French cuisine with inspiration from Asia's rich culinary heritage.

Odette is renowned for sourcing the finest artisanal ingredients. How does this translate into your dishes?

My culinary philosophy revolves around this principle — ingredients that are a reflection of the terroir. Since a young age, it has been instilled in me that the most remarkable flavors and dishes can come from the simplest ingredients. To this day, this ethos continues to inspire me to bring this purity and authenticity of the table. Our menu research and development process first and foremost starts with produce. We take time to taste, research, and experiment how to allow the produce to shine on a plate —this includes exercising restraint in our preparation to bring out its natural flavors.

The restaurant is named after your grandmother. How does her legacy influence you?

My grandmother, Odette, was the first to pique my interest in cooking and instilled in me a deep respect for nature and its seasonality. She is the person who showed me how much pleasure, how much joy, how much happiness and emotion you can give to people through food and cuisine, and I became a chef to share what she taught me with the world. At the end of the day, a restaurant full of happy guests is what I'm after.

How do you incorporate nuts and dried fruits into your cooking?

We often use nuts in our dishes. Our Pastry Chef, Louisa Lim, has also created some wonderful treats with nuts like Ardèche Chestnut, Mont Blanc, and her latest creation, Grain de Café. They add a nice balance to our desserts, and I love their rich, earthy aroma!

How do you balance your commitment to sustainability and seasonality with creating a luxury dining experience?

Sourcing ingredients thoughtfully and carefully remains at the heart of our business. We select our suppliers and artisanal farmers who uphold sustainable practices, providing us with a wide range of seasonal ingredients —from responsibly sourced seafood to fresh farm produce.

What's next for chef Julien Royer?

This year marks a special milestone —Odette turns 10! It's a time for us to evolve, and I'm beyond excited to share a refreshed look of our restaurant with you at the end of the year. Claudine is expanding its space: we're building a terrace that offers a more casual dining experience. We have many other exciting plans in the pipeline, which we will share in due time!

QUICK-FIRE ROUND!

What do you enjoy the most about being a chef?
Feeding people and sharing emotion through food.

What is your personal favorite dish with nuts or dried fruits?
Odette's granola and Grain de Café dessert!

What is the next big culinary trend?
Less is more!

What nuts or dried fruits do you always have in your kitchen at home?
Walnuts! They go well with cheese —my comfort food.

Grain de Café

Buckwheat tuile:

- 310 g water
- 30 g butter
- 2 g salt
- 35 g buckwheat flour
- 60 g icing sugar
- 70 g egg whites

Mix flour, icing sugar, and egg whites in a big mixing bowl. In a separate pot, put water, butter, and salt. Bring the elements in the pot to boil and then pour it into the bowl in 3 parts. Pass through chinois and weigh 320 g of mix onto a flat cast-iron tray. Bake at 165°C, fan 1, and 50% humidity for 30-40 minutes. Remove from tray and put oven at steam mode, fan 1 to humidify the tuile again. Cut to desired shape and mold.

Coffee crumble:

- 90 g hazelnut powder
- 50 g sugar
- 20 g butter
- 10 g T55 flour
- 8 g cocoa powder
- 4 g instant coffee
- 2 g fleur de sel

Dicing the butter into cubes, put everything in the mixer and use the paddle attachment to incorporate everything together. Bake at 165°C, fan 3 for 10 minutes.

Biscuit cuillère:

- 250 g egg whites
- 180 g sugar
- 90 g T55 flour
- 90 g potato starch
- 143 g egg yolks

Combine egg whites and sugar in a mixing bowl. Whip meringue to stiff peaks, stream in egg yolks, and fold in sifted dry ingredients. Scale to 600 g per tray and bake for 8 minutes at 170°C, fan 2.

Espresso syrup:

- 150 g espresso
- 75 g water
- 50 g sugar
- 25 g amaretto

Make sugar syrup and add amaretto and espresso at the end.

Coffee ganache montée:

- 120 g cream
- 35 g coffee beans
- 110 g Opalys chocolate
- 1 leaf gelatin
- 200 g cream

Heat 120 g cream in a pot and blend coffee beans to infuse coffee into cream for 5 minutes. Make up for the shortfall. Melt Opalys chocolate in a double boiler and melt gelatin in the hot infused cream. Add cream into the chocolate and add the cold 200 g cream at the end. Hand blend and sieve.

Coffee praline:

- 150 g toasted hazelnuts
- 10 g ground coffee beans
- 50 g sugar
- 2.5 g sea salt

Make a dry caramel with the sugar. Blend the ground coffee beans with the toasted hazelnuts and sea salt.

Tiramisu foam:

- 3 eggs
- 1 leaf gelatin
- 10 g water
- 40 g icing sugar
- 170 g mascarpone
- 150 g cream
- 40 g amaretto

Using a hand blender, mix icing sugar, eggs, and mascarpone together in a bowl. Heat water in a pot, and then melt the gelatin, pouring the melted gelatin into the egg mixture and finishing with cold cream and amaretto. Blend and sieve. Give 2 charges.

Sobacha ice cream:

- 200 g cream
- 800 g milk
- 200 g yolk
- 200 g sugar
- 30 g Trimoline
- 5 g ice cream stabilizer
- 250 g sobacha

Infuse sobacha in boiled milk for 20 minutes and put back the shortfall. Add cream and Trimoline into the mixture. Cook crème anglaise to 83°C and sieve.

Caramelized pecan nuts:

- 250 g toasted pecan nuts
- 17 g egg whites
- 25 g brown sugar
- 83 g sugar
- 2 g sea salt
- 16.5 g water

Mix all the ingredients together. Put all the pecan nuts on a silicone baking mat and bake in the oven at 170°C, stirring gradually.

Cacao opaline:

- 150 g fondant
- 100 g glucose
- 15 g pâte de cacao

Cook fondant and glucose to 155°C, take it off the heat and then stir in the pâte de cacao and pour onto parchment paper. Blend the mass in a Robot-Coupe to a powder. Dust opaline powder on a silicone baking mat and use the oval cutter to do cutouts. Bake at 165°C until sugar is melted.

Plating:

Cut biscuit cuillère using size 5 ring cutter and soak it in espresso syrup. Put the ring of buckwheat tuile on the plate and the soaked sponge cake in the ring. Place the caramelized pecan nuts and coffee crumble within the ring. Pipe coffee ganache and coffee praline within the ring. Add a scoop of sobacha ice cream and pipe the tiramisu foam. Dust cocoa powder onto opaline and add on the tiramisu foam.

Trade

USA: Trump's Tariff Shifts Spark Global Retaliation and Uncertainty

The blanket 25% tariffs on Mexico and Canada announced by US President Donald Trump in early February took effect on March 4, 2025, as reported by CNN. Trump also doubled the new tariff on China, which is imposed on top of existing tariffs on Chinese goods, from 10% to 20%. China and Canada quickly retaliated. Canada announced a 25% tariff on US$20.7 billion of US goods, including on peanut butter, effective March 4. China announced its own retaliatory measures on March 4, including an additional 10% tariff on US tree nuts, dried fruits, and peanut butter, among other agricultural products. Shortly thereafter, Trump abruptly backtracked, suspending the 25% tariff on products traded under the US-Mexico-Canada Agreement, but implied that other tariffs on Canadian and Mexican products would be coming in April.

On March 12, the EU announced countermeasures in response to Trump's 25% steel and aluminum tariff. Firstly, the suspension of 2018 and 2020 countermeasures will be allowed to lapse on April 1, whereupon 25% duties will come into effect on US peanut butter and dried cranberries. Secondly, a package of new countermeasures on US goods, including in-shell and shelled almonds and crude peanut oil, was put forward. After a public consultation, these measures are expected to come into force by mid-April.

At the time of this report, uncertainty reigned as businesses and trade partners scrambled to assess the evolving tariff landscape.

IRAN: EU Grants Six-Month Period to Resolve Pistachio Aflatoxin Issue

After concerns were raised about a potential ban on Iranian pistachio imports to Europe due to aflatoxin contamination, the INC closely monitored subsequent developments. The INC reached out to members and facilitated contacts with relevant organizations in Iran and Europe. FRUCOM confirmed in December that the Commission had decided not to ban imports of Iranian pistachios for at least six months. During this period, the effectiveness of measures taken by Iran will be assessed and control frequencies will be more than 50% in some EU Member States. If, at the end of the six-month period, the results are considered unsatisfactory, a ban will be imposed.

CÔTE D'IVOIRE: New Rules on Cashew Exports Adopted by Council of Ministers

In November, the Council of Ministers of Côte d'Ivoire adopted two new rules affecting cashew exports: 1) an ordinance setting a 5% single exit duty on raw cashew nut exports, and 2) a decree requiring cashew producers to obtain authorization from the Cotton and Cashew Council for the export of cashew products.

EU: Proposed Tariffs on Agricultural Products From Russia and Belarus

In January, the European Commission adopted a proposal to impose tariffs on a number of agricultural products from Russia and Belarus. If adopted by the European Parliament and the Council, the goods listed in Annex I of the proposal (including edible fruit and nuts under HS code 08) will be subject to an additional 50% ad valorem tariff customs duty on top of the applicable Common Customs Tariff rate.

SENEGAL: Peanut Exports Suspended for 2024/25 Season

As reported by *APA News*, Senegal's Ministry of Agriculture announced the suspension of peanut exports for the 2024/25 campaign, seeking to preserve national supplies and support local processors.

UK: Extension of Tariff Suspension on Prunes

The UK Government has decided to extend the suspension of the 8% tariff on prunes (commodity code: 0813 2000 00) until June 30, 2026. According to a press release from the California Prune Board, the announcement was made as part of a raft of extensions affecting UK imports of food.

CHINA-PERU: Upgraded Free Trade Agreement and Phytosanitary Protocols

China and Peru signed an upgraded free trade agreement in November, during Chinese President Xi Jinping's visit to Peru for a meeting of Asia-Pacific Economic Cooperation (APEC). During the same visit, phytosanitary protocols were signed for the export of Peruvian pecans and Brazil nuts to China.

EFTA-THAILAND: Free Trade Negotiations Completed

In late 2024, the European Free Trade Association member states —Iceland, Liechtenstein, Norway and Switzerland— concluded negotiations with Thailand towards an ambitious and broad-based free trade agreement. The parties formally signed the agreement in January at the World Economic Forum in Davos, Switzerland.

EU-CHILE: Interim Trade Agreement Enters Into Force

The Interim Trade Agreement between Chile and the EU has officially come into force following Chile's ratification. Aimed to boost business competitiveness and support the development of net-zero economies on both sides, the modernized trade agreement between the EU and Chile consists of two parallel legal instruments: 1) the Interim Trade Agreement and 2) the Advanced Framework Agreement.

EU-MERCOSUR: Political Agreement Reached on Free Trade

In December, the European Commission President and her counterparts from four Mercosur countries (Brazil, Argentina, Paraguay, and Uruguay) finalized negotiations for an EU-Mercosur trade deal, marking the first step towards formally concluding the agreement.

EU-MEXICO: Conclusion of Negotiations on Modernized Global Agreement

Political negotiations to modernize the Global Agreement between the EU and Mexico concluded in January. According to a statement released by the EU, the agreement creates a framework to deepen and widen EU-Mexico political dialogue, cooperation and economic relations, and will create new economic opportunities for both sides.

UK-INDIA: Free Trade Talks to Resume in 2025

Following a bilateral meeting with Prime Minister Narendra Modi at the G20 summit in November, the UK Prime Minister announced that UK-India trade talks will relaunch in 2025.

USA: Brazilian Macadamias Granted Market Access Without Phytosanitary Certificate

The United States has approved the import of macadamias from Brazil without requiring a phytosanitary certificate, according to a statement published by the Brazilian government in February.

USA: Almond Board of California Secures US$13 Million to Expand Global Markets

The Almond Board of California (ABC) has secured an additional US$6 million from the U.S. Department of Agriculture through the Regional Agricultural Promotion Program (RAPP), bringing the total funding received from the program to US$13 million. Announced in late December, this funding will support the expansion of promotional activities, new market research, and the development of innovative strategies to grow global demand for California almonds.

RAPP funds support long-term projects that can be implemented over three to five years, rather than being restricted to a single fiscal year. A key area of focus for the first tranche of US$7 million funding has been India, the top export market for California almonds but also a market identified for its strong growth potential. ABC plans to use the second tranche of funding over five years to accelerate its plans and explore ingredient-based demand for California almonds.

Sustainability

EU: Packaging and Packaging Waste Regulation Enters Into Force

Regulation (EU) 2025/40, on packaging and packaging waste, entered into force on February 11, 2025, and will apply from August 12, 2026. The rules aim to minimize the quantities of packaging and waste generated while lowering the use of primary raw materials and fostering the transition to a circular, sustainable and competitive economy.

The new rules include:

- Restrictions on certain single-use plastics.
- Minimizing the weight and volume of packaging and avoiding unnecessary packaging.
- 2030 and 2040 targets for a minimum percentage of recycled content in packaging.
- A requirement for take-away businesses to offer customers the option to bring their own containers at no extra cost.
- Minimizing substances of concern, including restrictions on packaging containing per- and polyfluorinated alkyl substances (PFAS) if they exceed certain thresholds.

Annex V of the Regulation lists packaging formats that will be restricted. Article 25 stipulates the following: "By 12 February 2027, the Commission shall publish guidelines, in consultation with Member States and the European Food Safety Authority, which explain Annex V in more detail, including examples of the packaging formats in scope, and any exemptions from the restrictions, and provide a non-exhaustive list of fruits and vegetables that are excluded from point 2 of Annex V."

EU: Trilogue Negotiations Begin on Green Claims Directive

On January 28, 2025, the Parliament, Council and Commission began trilogue negotiations on the proposed Green Claims Directive, which deals with the substantiation and communication of explicit environmental claims. At this first session, the Parliament and the Council presented their mandates and priorities.

EU: Forced Labor Ban Enters Into Force

Regulation (EU) 2024/3015, banning products made with forced labor from the EU market, was published in the *Official Journal of the European Union* on December 12, 2024, and will apply from December 14, 2027.

USA: Federal Funding for Commodity Storage Assistance

In November, the U.S. Department of Agriculture (USDA) announced the creation of the Commodity Storage Assistance Program, which will provide US$140 million to help specialty crop producers gain access to packinghouses, grain elevators, or other facilities necessary for the marketing of agricultural commodities. The program targets producers experiencing reduced commercial storage access due to 2024 natural disasters.

Food Safety

EU: Hazelnuts and Pistachios Returned Due to Tenuazonic Acid

Two RASFF notifications have been filed recently for tenuazonic acid (TEA), an *Alternaria* toxin, in tree nuts: hazelnuts from Türkiye on February 28 and pistachios from the USA on March 7. In both cases, the indicative level for TEA in tree nuts set in Commission Recommendation 2022/553 (100 µg/kg) was exceeded and the nuts were returned to the

consignor. (The indicative level set for dried figs is considerably higher at 1,000 µg/kg.) RASFF database information suggests that these are the first RASFF notifications for TEA in tree nuts.

Producers are advised to remain vigilant and are reminded that the European Food Safety Authority (EFSA) is gathering data on *Alternaria* toxins in foodstuffs including tree nuts and dried figs. For this year's annual call, food business operators and other stakeholders may submit data until June 30, 2025. As of now, the EU has not established a specific deadline or timeline for setting maximum levels for *Alternaria* toxins.

EU: EFSA Publishes Mandate to Evaluate Impact of Reducing MLs for SO_2

The European Food Safety Authority (EFSA) has published the mandate it received from the European Commission last year to evaluate the impact of reducing the maximum levels of sulfur dioxide (SO2) on dietary exposure. For dried apricots specifically, EFSA has been asked to estimate dietary exposure to SO_2 under two scenarios: 1) ML 2,000 mg/kg; 2) ML 1,500 mg/kg. EFSA's assessment will be completed by June 30.

EU: New Procedures For Common Health Entry Documents

In January, the *Official Journal of the European Union* published Commission Delegated Regulation (EU) 2025/65, which modifies the conditions under which a separate Common Health Entry Document (CHED) must be submitted for consignments leaving a border control post for a control point where identity and physical checks are to be performed. Under the new rules, when consignments are transferred to a control point other than the border control post, operators are required to submit and link two separate CHEDs.

EU: Bisphenol A Banned in Food Contact Materials

In December, the *Official Journal of the European Union* published Commission Regulation (EU) 2024/3190, banning the use of bisphenol A (BPA) in food contact materials, citing its potentially harmful health impact. BPA is a chemical substance used in the manufacture of certain plastics and resins.

PERU: Specifications for Adhesives Used in Labels on Food Packaging and Containers

In December, Peru notified the World Trade Organization of a new specification on adhesives for self-adhesive labels on food packaging and containers. The new rules will enter into force in late April 2025.

SINGAPORE: Food Safety and Security Bill Passes Parliament

The Food Safety and Security Bill (FSSB) was passed in the Parliament of Singapore in January. The FSSB seeks to consolidate and refresh existing food-related legislation, strengthen Singapore's food safety regime to better protect consumers and public health, and keep pace with emerging challenges in safeguarding food security.

UK: Safety and Security Declarations Required for All EU Imports

Since January 31, 2025, safety and security declarations are required for all imports into Great Britain from the EU. The UK Government has published a guidance document entitled *Preparing for the new safety and security declaration requirements*.

USA Raises Concerns at WTO About EU Pesticide Policies, Urges Alignment With Codex Standards

In late November, the United States notified the World Trade Organization (WTO) of its concerns regarding the EU's approach to reducing MRLs without a full risk assessment or conclusive scientific evidence to justify the established levels. The United States reiterated its request that the EU align with Codex MRLs when the European Food Safety Authority (EFSA) is unable to finalize a risk assessment. In addition, the United States requested that the mancozeb MRL for walnuts be maintained at the current EU level and that a 36-month transition period be granted to allow for additional information to be considered. The United States also notified the WTO of its concerns regarding EU import tolerances for certain pesticides to achieve environmental outcomes in third countries.

Labeling

USA: FDA Updates "Healthy" Claim Definition to Include Nuts

The U.S. Food and Drug Administration (FDA) has announced a rule under which nuts now qualify to bear the "healthy" nutrient content claim. Issued on December 19, 2024, the new rule is intended to help consumers identify foods that are particularly useful as the foundation of a diet that is consistent with dietary recommendations.

The updated criteria for the "healthy" claim are aligned with current nutrition science, the latest edition of the Dietary Guidelines for Americans, and the updated Nutrition Facts label. Nutrient-dense foods that are encouraged by the Dietary Guidelines, with no added ingredients except for water, automatically qualify for the updated "healthy" claim because of their nutrient profile and positive contribution to an overall healthy diet.

Nuts are an example of a food that did not previously qualify as "healthy" but are foundational to a healthy eating pattern and recommended by the Dietary Guidelines —and, as such, now qualify to bear the claim. In February 2023, the INC submitted comments to the FDA arguing in favor of updating the "healthy" claim definition.

The FDA is looking into creating a symbol that manufacturers could use on food labeling to show that a product meets the criteria for the "healthy" claim.

Following a memorandum issued on January 20, 2025, by US President Donald Trump, titled "Regulatory Freeze Pending Review," the FDA postponed the implementation of the final rule until April 28, 2025.

USA: FDA Proposes Requiring At-a-Glance Nutrition Information on the Front of Packaged Foods

In January, the U.S. Food and Drug Administration (FDA) issued a proposed rule that would require a front-of-package (FOP) nutrition label on most packaged foods. The proposed FOP nutrition label, also referred to as the "Nutrition Info box," provides information on saturated fat, sodium, and added sugars content in a simple format showing whether the food has "Low," "Med" or "High" levels of these nutrients. It complements the FDA's Nutrition Facts label, which gives consumers more detailed information about the nutrients in their food. The deadline to submit comments on the proposed rule is May 16, 2025.

USA: FDA Releases Final Guidance Document on Food Allergens

In January, the U.S. Food and Drug Administration (FDA) released a guidance document entitled *Guidance for Industry: Questions and Answers Regarding Food Allergen Labeling (Edition 5)*, which is intended to answer the industry's frequently asked questions about food allergens, including food allergen labeling requirements under the Federal Food, Drug, and Cosmetic Act.

The new guidance includes a revised list of tree nuts that the FDA considers to be major food allergens: almond, black walnut, Brazil nut, California walnut, cashew, filbert/hazelnut, heartnut/Japanese walnut, macadamia nut/Bush nut, pecan, pine nut/pinon nut, pistachio, and English and Persian walnut.

The document contains questions and answers about food allergen labeling requirements, including the labeling of tree nuts. It also addresses certain specific packing and labeling situations, such as individual units within a multiunit package. This final guidance replaces both the draft and final guidance documents on food allergen labeling that were issued in November 2022.

Marketing Orders

USA: Increased Assessment Rate on Walnuts Grown in California

In late November, the U.S. Department of Agriculture (USDA) Agricultural Marketing Service issued a final rule increasing the assessment rate established for 2024-2025 and subsequent marketing years from US$0.011 to US$0.0125 per in-shell pound of California walnuts. The assessment rate will remain in effect indefinitely unless modified, suspended, or terminated.

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How to Handle Consignment Rejections

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Consignment rejections can present a costly challenge for California almond exporters. However, understanding rejection protocols, reconditioning options, and regulatory requirements can help minimize financial losses and supply chain disruptions. This article explores strategies for managing rejected shipments and navigating the necessary steps to resolve issues promptly.

> *"Retesting is probably the best-case scenario with the least disruption."*

California grows 80% of the world almond supply. A vast majority of California almonds are exported around the world to almost 100 countries directly or indirectly. In the 2023/24 crop year, approximately 45,000 containers of California almonds were exported. That's a lot of containers! And while the industry takes the utmost care to supply high-quality product to its customers, occasional rejections of consignments are a fact of life.

So, how does a shipper handle a consignment rejection when it occurs? First, let's look at what rejection means. In some countries, rejection is defined as a consignment denied entry due to exceeding approved aflatoxin tolerances. In some cases, hygiene issues or infestations have also been grounds for rejection. That is why it's important to understand the specific requirements and practicalities of each country, as well as the needs and costs associated with handling rejected goods.

Thanks to the robust Pre-Export Check (PEC) protocol in place for the EU market, in which the California almond industry performs pre-shipping sampling and testing for aflatoxin, the number of rejections in the EU has stayed extremely low as a percentage of the shipment volume. In comparison, Japan inspects at the 100% level, and consequently, we see a higher number of rejections, but this still represents an exceedingly low percentage. As discussed below, there are some differences in how rejected shipments are handled in these two markets. Currently, the only option for rejected shipments in Japan is to return them to the US.

In a typical rejection scenario, a consignment may leave the Port of Oakland bound for Spain, only to be rejected by the Spanish health authorities on arrival due to aflatoxin levels higher than the permissible limits of 10 ppb total and 8 ppb B1. The Almond Board of California (ABC), in its capacity as a local competent authority, is then contacted by the US Foreign Agriculture Service (FAS) office in Brussels and notified of the rejection. The ABC collects detailed information from the handler or shipper and liaises with the US Embassy in the country of rejection to facilitate communications with port health officials and help the handler as needed on the next steps.

Some of the options for handling rejected goods are outlined below.

Retesting

In Europe, the importer has a right to request a retest, at their own cost. If the retest results are satisfactory, the shipment is cleared. This is probably the best-case scenario with the least disruption.

Reconditioning

Reconditioning, or reprocessing, typically involves resorting or blanching the almonds to remove defects and thereby reduce the aflatoxin levels in the impacted shipment. This can occur in any processing facility that can provide resorting or treatment options. Typically, such facilities can be found in the Netherlands, Italy, and Spain. Japan currently does not offer this option, but discussions have been underway to allow local reconditioning for rejected shipments.

> *"A key factor is quick decision-making."*

Returning the Consignment to the US

Occasionally, a shipper may decide to simply bring the shipment back to the US. The process of bringing rejected goods back to the US involves several steps, including working with a customs broker and preparing for a detention notice from the FDA. If the rejected shipment was tested at levels below the US aflatoxin tolerance (20 ppb), the return process is usually straightforward —although FDA still reserves the right to its own due diligence, including shipment inspection and testing.

If the shipment was tested at a level higher than the US tolerance, a shipper will need to prepare and submit a reconditioning plan to the FDA. The reconditioning plan must be detailed and include company information, product background, pre-shipment aflatoxin testing records, and a description of the reconditioning method. The plan should also outline post-reconditioning compliance verification, including sampling and aflatoxin testing.

Diverting Shipment to a Third Country

A less used option is to divert the rejected shipment to another market. However, this may involve obtaining a letter of acceptance from the concerned national authorities in the third country.

Costs

Cost is a significant factor in deciding whether to reprocess and retest the consignment in Europe itself or bring the consignment back to the US. There can be detention and demurrage costs while arrangements are being made. Reprocessing costs can involve moving the consignment to the facility (which may be in another country) plus the cost of sorting and/or blanching. Returning a consignment to the US can cost between US$8,000 and US$9,000 plus any additional cost of reprocessing on return, if needed.

A key factor is quick decision-making. The longer a consignment is sitting at the dock, the more product quality may be adversely impacted. Thus, it is in the handler's interest to work with their importer to make the decision quickly. It is always advisable to confirm all the details of a reprocessing option, should it be chosen, in terms of cost and duration. The ABC is always available for additional information and assistance if needed.

The ABC's activities in dealing with rejections have included ongoing engagement with stakeholders to address inspection, rejection, and reprocessing issues, as well as efforts to educate port officials and inspectors on the California almond industry's food safety programs and quality controls. Further, the ABC is also currently in discussion with US authorities to identify opportunities for streamlining goods return, including the use of standardized reprocessing plans and USDA approved labs.

Intensifying Pecan Orchards: An Opportunity to Enhance Productivity and Carbon Sequestration

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Pecan orchards can be considered ecosystem service providers due to the benefits they provide with regard to carbon dioxide, the main greenhouse gas. Beyond boosting productivity, pecan orchard intensification strategies have the potential to enhance carbon sequestration, contributing to climate change mitigation efforts.

Pecan trees (*Carya illinoinensis*) are large, reaching up to 130 feet in height, with a wide canopy and an extensive root system— all built out of carbon, an element we need to keep out of the atmosphere. Unlike annual crops such as soybeans or maize, long-lasting perennial pecan trees continue to absorb carbon from the air through photosynthesis year after year. With a lifespan of around 100 years, a mature pecan tree has astonishing carbon capture potential —at a steady and consistent rate, all while producing nuts. In this sense, pecan trees are not only an agricultural asset, but also valuable for the environment. Current orchard management trends have the potential to enhance this aspect of pecan production.

In a quest to unlock the full potential of pecan, growers are exploring intensive management practices typically used for other fruit crops, such as lemons and avocados. In Argentina, for instance, while the most common planting pattern is 10 × 10 m, there is a growing trend towards more intensive patterns, such as 10 × 5 m, 6 × 9 m and, in trials, even 5 × 2.5 m.

By applying these advanced practices, pecan growers aim to expedite the production timeline and enhance the overall yield of pecan orchards. This shift reflects a broader trend towards optimizing the growth and profitability of crops that have traditionally required long-term investment.

Intensification involves not only increasing tree density but also optimizing irrigation and fertilization practices. Beyond boosting productivity, these strategies have the potential to enhance carbon sequestration, contributing to climate change mitigation efforts.

Pecan orchard with 9 × 9 m spacing (123 trees/hectare). Photo: Sebastián Cambareri.

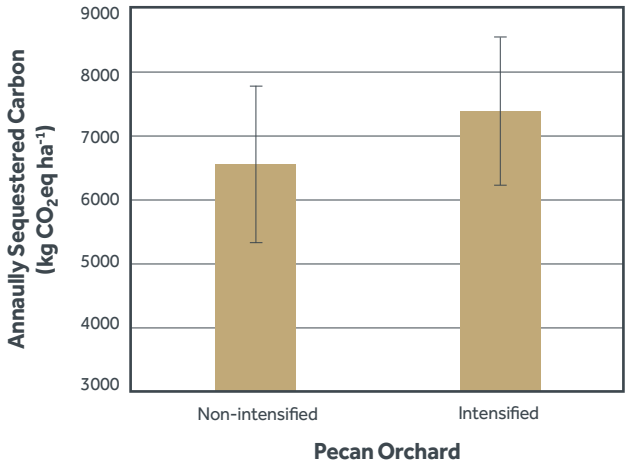
Increasing Tree Density to Maximize Yields and Carbon Sequestration

Traditionally, pecan orchards have been planted with a 10 × 15 m spacing pattern suitable for large mature tree sizes. However, by planting trees closer together, growers can maximize the use of available land and potentially increase

nut yields per hectare. Higher-density planting also promotes more efficient light interception and can lead to earlier bearing, thereby shortening the time to achieve economic returns. Additionally, higher tree density means more carbon sequestration. Experiments in Argentina with 10-year-old pecan orchards showed that an 18.3% increase in tree density (104 vs. 123 trees/ha) sequestered 12% more carbon per hectare and year (Figure 1).

Figure 1

Annually sequestered carbon in non-intensified vs. intensified pecan orchards.



Nevertheless, increased tree density comes with challenges that must be carefully addressed. As trees grow, their canopies may tend to overlap, leading to competition for light, water and nutrients. Without proper management, this competition reduces individual tree productivity and increases disease pressure due to reduced air circulation. To address these challenges, growers can adopt management practices such as regular pruning and thinning to maintain optimal tree health and productivity.

Optimizing Irrigation Practices to Enhance Water Use Efficiency and Capture More Carbon

Irrigation is another critical component of intensifying pecan orchards, especially in regions where rainfall patterns change throughout the year. Adequate irrigation ensures that trees receive sufficient water to support vigorous branches, healthy leaves and well-filled nuts, which is crucial for maximizing yields. Precision irrigation techniques, such as drip or micro-sprinkler systems, promote more efficient water use by delivering water directly to the root zone, reducing evaporation and runoff.

Optimizing irrigation not only supports higher tree densities but also contributes to carbon capture and sequestration. Well-watered pecan trees can photosynthesize more efficiently, capturing more carbon dioxide from the atmosphere and storing it as biomass. Moreover, well-managed irrigation reduces the risk of water stress, preventing decreases in biomass production and improving carbon sequestration. By ensuring that pecan orchards are adequately irrigated, growers can enhance both productivity and environmental sustainability.

Fertilization Strategies to Support Tree Health and Soil Carbon Sequestration

Fertilization is also key to pecan orchard intensification. In high-density orchards, the demand for nutrients increases due to greater competition among trees. Adequate fertilization — both soil and foliar— ensures that trees receive the necessary nutrients, such as nitrogen and zinc, to sustain vigorous growth and high nut yields.

However, care must be taken in fertilization management to avoid negative environmental impacts. Over-application of fertilizers provokes nutrient runoff as well as emissions of greenhouse gases, particularly nitrous oxide. To optimize fertilization practices, soil testing and leaf tissue analysis must be conducted to determine the orchard's specific nutrient needs and apply fertilizers at the right time and in the right amounts.

Beyond supporting tree growth, optimized fertilization practices enhance carbon sequestration in pecan orchards. Healthy, vigorously growing trees capture more carbon dioxide through a complete photosynthetic mechanism (proteins and enzymes) built from nitrogen, phosphorus, potassium, zinc, etc., and allocate a portion of this carbon to their shoots, trunks, roots and the surrounding soil. Over time, this carbon is incorporated into soil organic matter, which can improve soil structure, water retention and nutrient-holding capacity. Thus, by maintaining a balanced fertilization regime, growers can promote both orchard productivity and soil carbon sequestration.

Challenges and Considerations in Orchard Intensification

While intensification offers benefits, it also presents challenges that growers must navigate. Increased tree density requires more careful management to prevent tree canopy overcrowding. Similarly, optimizing irrigation and fertilization practices demands precise management to avoid overuse and environmental degradation.

Moreover, intensification efforts must be tailored to the specific conditions of each orchard, including soil type, climate and water availability. Growers should adopt either a holistic or a regenerative approach to orchard management, integrating various practices to achieve sustainable intensification that balances productivity with environmental stewardship.

Conclusion

Intensifying pecan orchards through increased tree density, optimized irrigation and balanced fertilization offers a pathway to boost productivity and enhance carbon sequestration. However, successful intensification requires careful management to address the challenges associated with higher tree densities and increased resource use. Higher-density plantings have not yet been shown to sustain higher productivity for longer than 12 or 15 years, after which production tends to stabilize at the same rate as a low-density plantation. Therefore, it remains to be seen how long this optimization can last. Nevertheless, by adopting a sustainable and integrated approach to orchard management, it is clear that pecan growers can achieve both economic and environmental benefits, contributing to a more sustainable agricultural future.

Regenerative Organic Certified® Tropical Dried Fruit: Advancing Sustainability in West Africa

Conveyor belt mango processing at HPW Ghana. Photo: HPW.

Tropical dried fruit producer HPW has introduced an initiative based on Regenerative Organic principles aimed at advancing sustainability in West Africa. By working with local farmers, the company is implementing environmentally responsible farming practices while supporting smallholder communities in Ghana and Côte d'Ivoire. This project was a candidate for the 2024 INC Excellence in Sustainability Award – Back to the People.

Launched in 2021, HPW's Regenerative Organic Certified® tropical dried fruit initiative focuses on collaboration with farmers in Ghana and Côte d'Ivoire. Through this project, the company works to implement regenerative agricultural practices for mangoes, pineapples, and coconuts while supporting the economic and environmental resilience of smallholder farmers. The initiative also contributes to reducing environmental impacts and improving long-term farming sustainability.

Agroforestry and Regenerative Agriculture

The Regenerative Organic Certified® project emphasizes agroforestry and regenerative agriculture, which restore soil health, enhance biodiversity, and minimize the environmental footprint of farming. HPW collaborates with over 1,600 small producers, of which around 60 are part of the initial phase of the Regenerative Organic project. They offer technical support and pre-financing for agro-inputs to their suppliers. This partnership encourages the adoption of practices such as crop rotation, multicropping, and green manure planting to improve soil fertility and productivity.

For example, Regenerative Organic Certified® pineapple farmers are encouraged to plant nitrogen-fixing legumes, like *Mucuna* beans, after harvesting. These cover crops enrich the soil and reduce reliance on external fertilizers, fostering more sustainable farming practices. Similarly, multicropping systems under coconut palms allow farmers to grow additional crops like yams, plantains, and pineapples, creating supplementary income streams while benefiting the soil.

Key Crops

The initiative has focused on mangoes, pineapples, and coconuts, which are key crops in the region. The company has invested in a tree nursery to promote and propagate different mango varieties, aiming to diversify harvest periods and support local producers.

In Côte d'Ivoire, farmers participating in the Regenerative Organic Certified® project produced a few hundred tons of fresh mangoes in 2022, which were processed into dried mangoes and exported to the United States. The following year, farmers in Ghana and Côte d'Ivoire began cultivating pineapples and coconuts in a mixed cropping system under regenerative principles. The first shipments of certified dried coconut were exported to the United States in 2024, marking an expansion that creates stable value chains and opens new markets for smallholder farmers.

Coconut forest with pineapple plants as cover crop, Côte d'Ivoire. Photo: HPW.

Impact on Farmers and the Environment

Farmers involved in the initiative benefit from stable demand for their produce, higher prices for Regenerative Organic Certified® fruit, and additional income opportunities from diversified cropping systems. By adhering to certification requirements, they gain access to premium markets that reward sustainable practices. Fairtrade certification at both of HPW's factories further enhances the benefits to producers by ensuring equitable trade practices.

The initiative's environmental contributions are notable. Practices like multicropping and green manure planting promote healthier soils, reduce the risk of soil erosion, and enhance biodiversity. Additionally, HPW prioritizes waste reduction at its facilities by converting fruit byproducts into energy through biogas systems, using biomass boilers for heat, and creating organic fertilizer from compost. The company also integrates water management systems and photovoltaic technology in its Ghanaian factory, further reducing its operational footprint.

HPW factory in Ghana. Photo: HPW.

Scaling Sustainability

Since its inception, HPW s Regenerative Organic Certified® initiative has seen a steady increase in the sales volumes of certified dried fruit.

As the initiative expands, HPW aims to increase the volumes of certified mangoes, pineapples, and coconuts sourced from Ghana and Côte d'Ivoire. This growth supports the farmers involved while fostering sustainable farming practices across the company's supply chain. As a significant buyer of fresh fruit in the region, HPW's efforts are contributing to a shift toward more sustainable and resilient agricultural systems in West Africa.

This initiative illustrates how companies in the nut and dried fruit sector are working to build equitable and sustainable value chains. By investing in long-term partnerships with local farmers and adopting innovative agricultural practices, HPW is playing a role in advancing the sustainability agenda within the industry.

> *"The Regenerative Organic Certified® initiative promotes sustainable farming practices and provides smallholder farmers with access to higher-value markets and stable incomes."*

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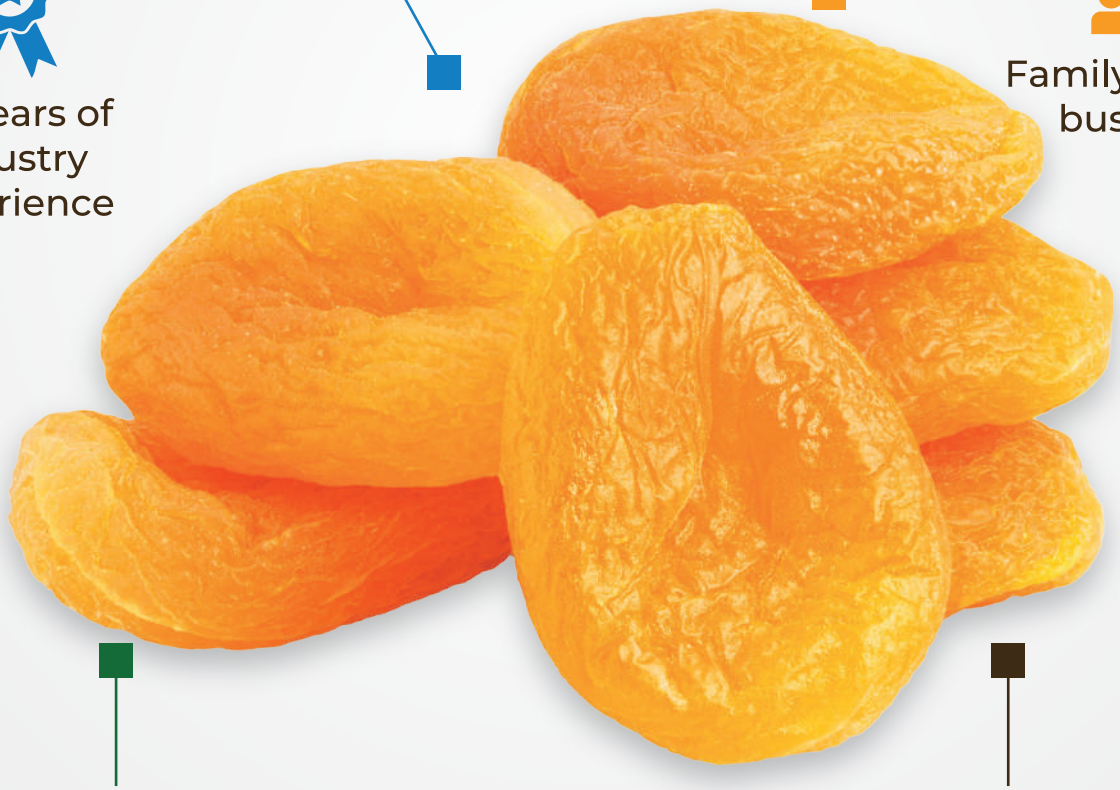

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Country/Product Spotlight

Dried Apricots & Türkiye

This Country/Product Spotlight is the 16th in a series of industry and market overviews in *Nutfruit* magazine. This report provides a snapshot of the dried apricot industry in Türkiye, with data, analysis and trends.

We would like to thank the Aegean Exporters' Associations for their collaboration on this edition.

Industry Highlight

The Turkish Dried Apricot Industry in Numbers

103,000 ha
planted area

107,500 MT
production

82,200 MT
exports**

56%
of global production

144
importing countries**

*2024/25 estimate.
** 5-year average, 2019/20–2023/24.

Production

Cultivation of the apricot (*Prunus armeniaca* L.) dates back more than 5,000 years, originating in Central Asia and Western China. The fruit was introduced to Anatolia around the 4th century BC, and over time, Türkiye became a significant center for apricot production.[1]

Malatya province produces 50% of apricots in Türkiye, around 90% of which are sundried. Over the past decade, apricot drying has spread to the neighboring provinces of Elazığ, Kayseri, Kahramanmaraş, Sivas, and Erzincan (Figure 1).[2] The total planted area dedicated to dried apricot production in Türkiye is 102,878 hectares.[3]

Figure 1. Main Dried Apricot Producing Areas of Türkiye
Source: Aksoy, U. (2024). Varieties and Uses, INC Academia Basic Course.

Türkiye is the world's leading producer of dried apricots, accounting for 56% of global production in the 2024/25 season (Figure 2). Over the past decade, Türkiye's share has consistently exceeded half of the world's dried apricot production, ranging from a low of 51% last season to a peak of 63% in 2017/18 and averaging 55%.

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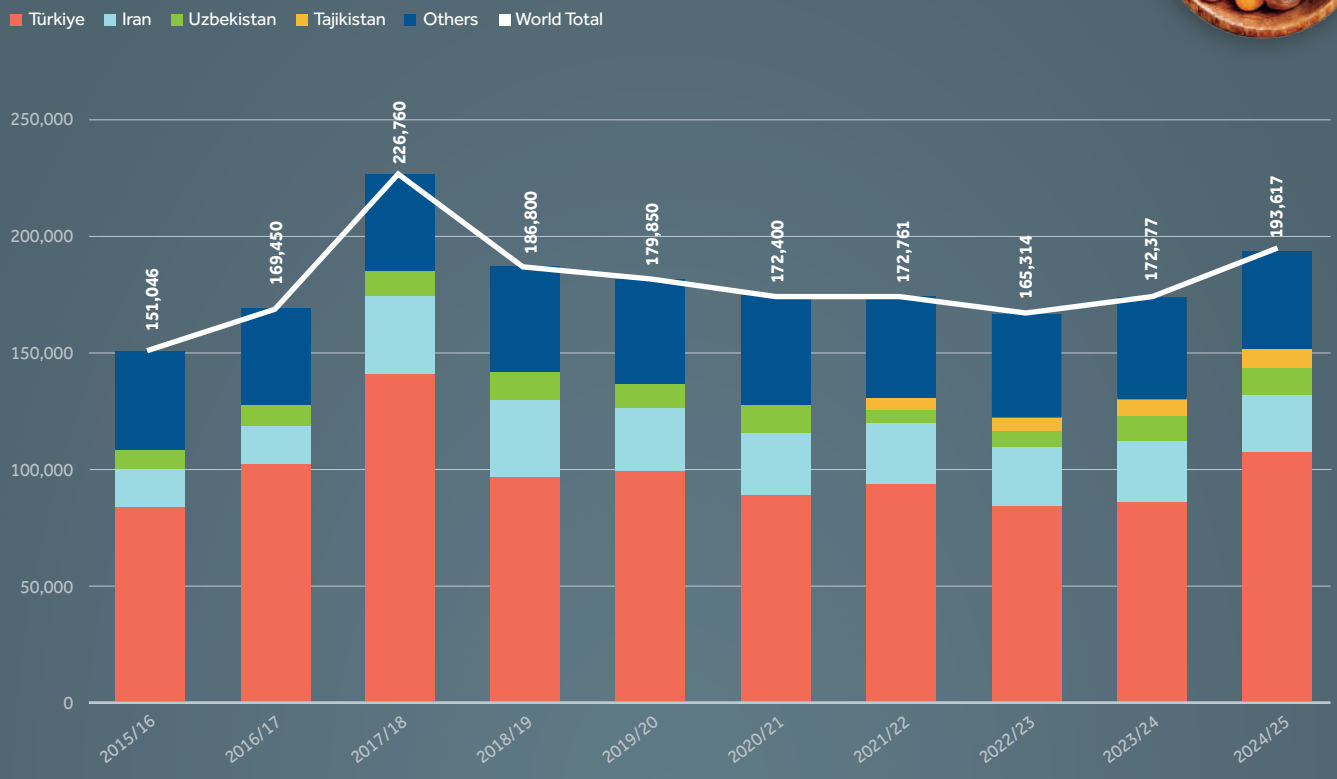
1. Ercisli, S. (2009). Apricot culture in Turkey. *Sci Res Essays*, 4(8), 715-719.
2. Aksoy, U. (2024). Varieties and Uses, INC Academia Basic Course.
3. Source: Aegean Exporters' Associations.

Figure 2. World Dried Apricot Production, Metric Tons

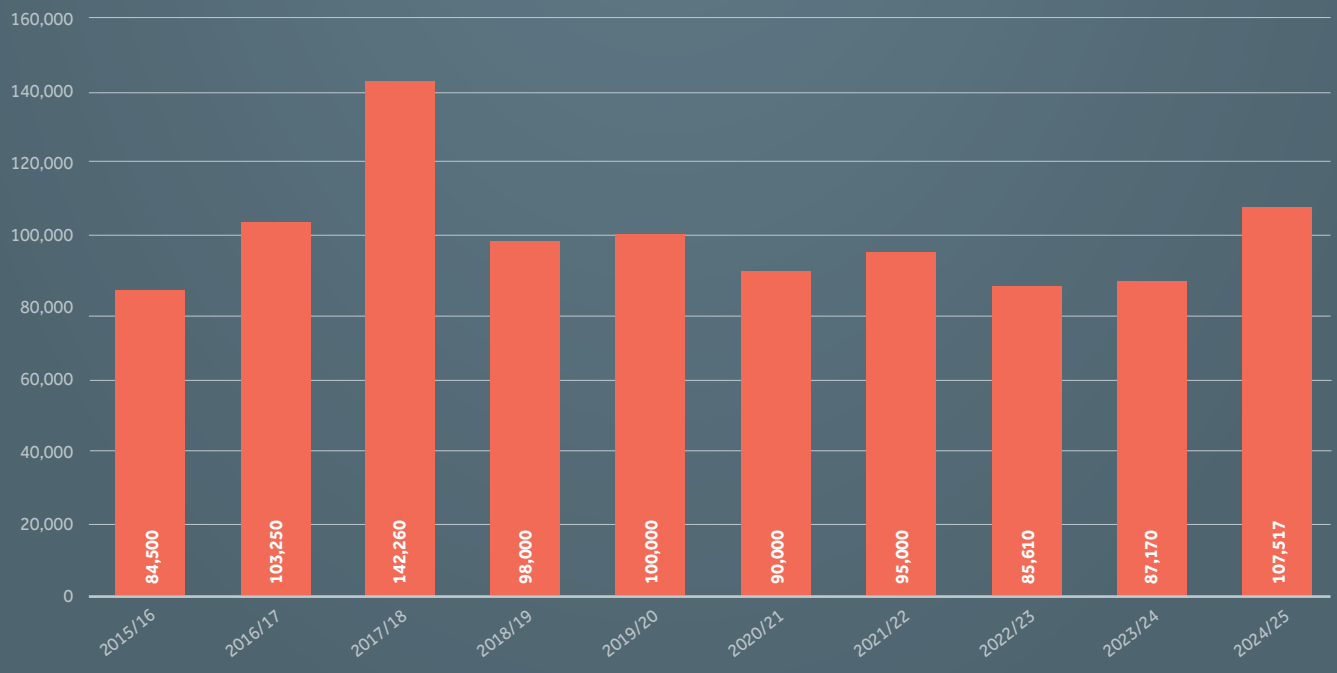
Source: Aegean Exporters' Associations and INC database.



Between the 2015/16 and 2024/25 seasons, Türkiye's dried apricot production fluctuated between 84,500 metric tons in 2015/16 and a record high of 142,260 MT in 2017/18. The 2024/25 season is projected to reach 107,517 MT, marking the second-highest production volume of the last decade (Figure 3).

Figure 3. Turkish Dried Apricot Production, Metric Tons

Source: Aegean Exporters' Associations.



Trade

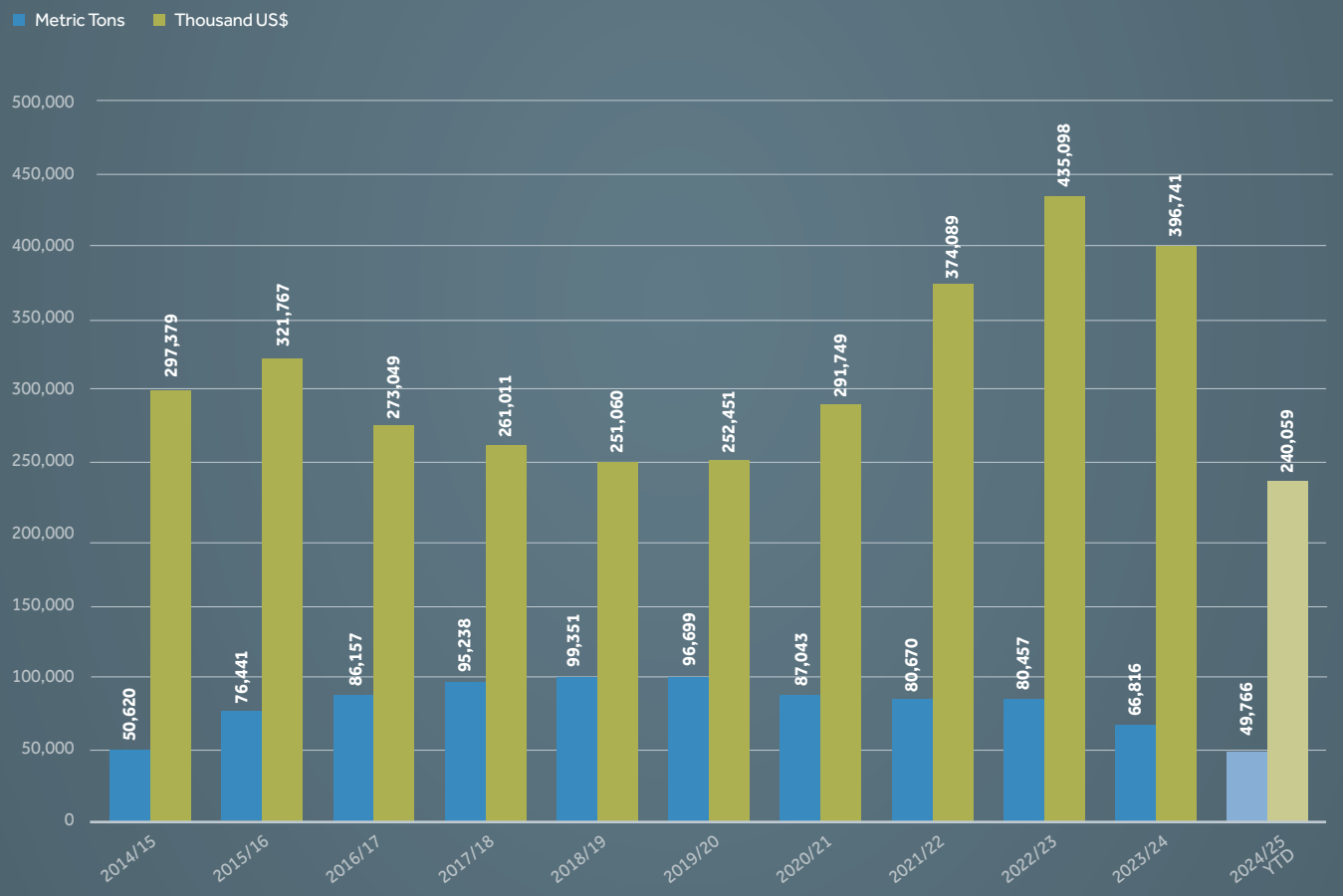
Over the past decade, Turkish dried apricot exports have shown a dynamic interplay between volume and value. Shipments started at 50,620 MT in 2014/15, gradually increasing to a peak of 99,351 MT in 2018/19 before experiencing a steady decline, reaching 66,816 MT in 2023/24.

In terms of export value, 2014/15 saw shipments totaling US$297 million, with a decade low of US$251 million in 2018/19, coinciding with the highest shipment volume. However, as exports declined, value surged, peaking at US$435 million in 2022/23 and remaining strong at US$397 million in 2023/24. Over the ten-year period, both export volume and value grew at a compound annual growth rate (CAGR) of 3%.

During the past five seasons, production constraints linked to environmental challenges have limited exportable supply, yet export value has continued to strengthen.

Year-to-date data from August 1, 2024, to February 1, 2025, shows a 27% increase in export volume compared to the same period the previous year, reaching 49,766 MT, indicating robust global demand (Figure 4).

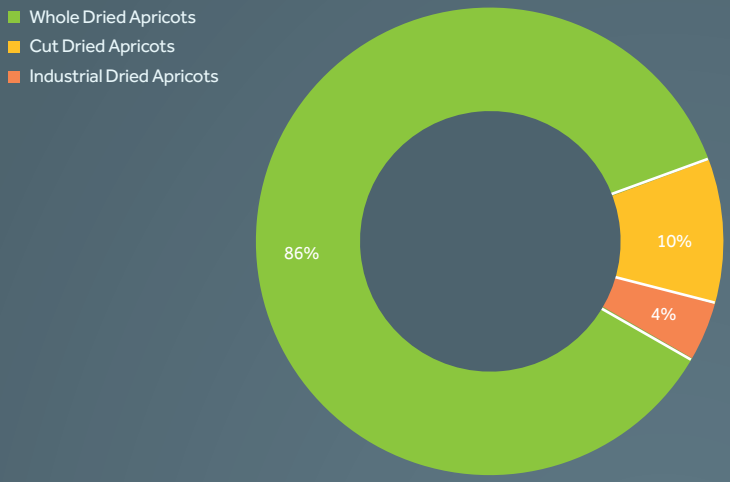
Figure 4. Turkish Dried Apricot Export Shipments, August 1 – July 31, Metric Tons and Thousand US$
Source: Aegean Exporters' Associations.



Turkish dried apricots exported worldwide fall into three categories: whole, cut, and industrial-use apricots. Whole dried apricots consistently make up the majority of exports, accounting for 86% of the total in the 2023/24 season, while cut and industrial use contributed 10% and 4%, respectively (Figure 5).

Figure 5. Turkish Dried Apricot Export Shipments, Share by Product, August 1, 2023 – July 31, 2024, Metric Tons

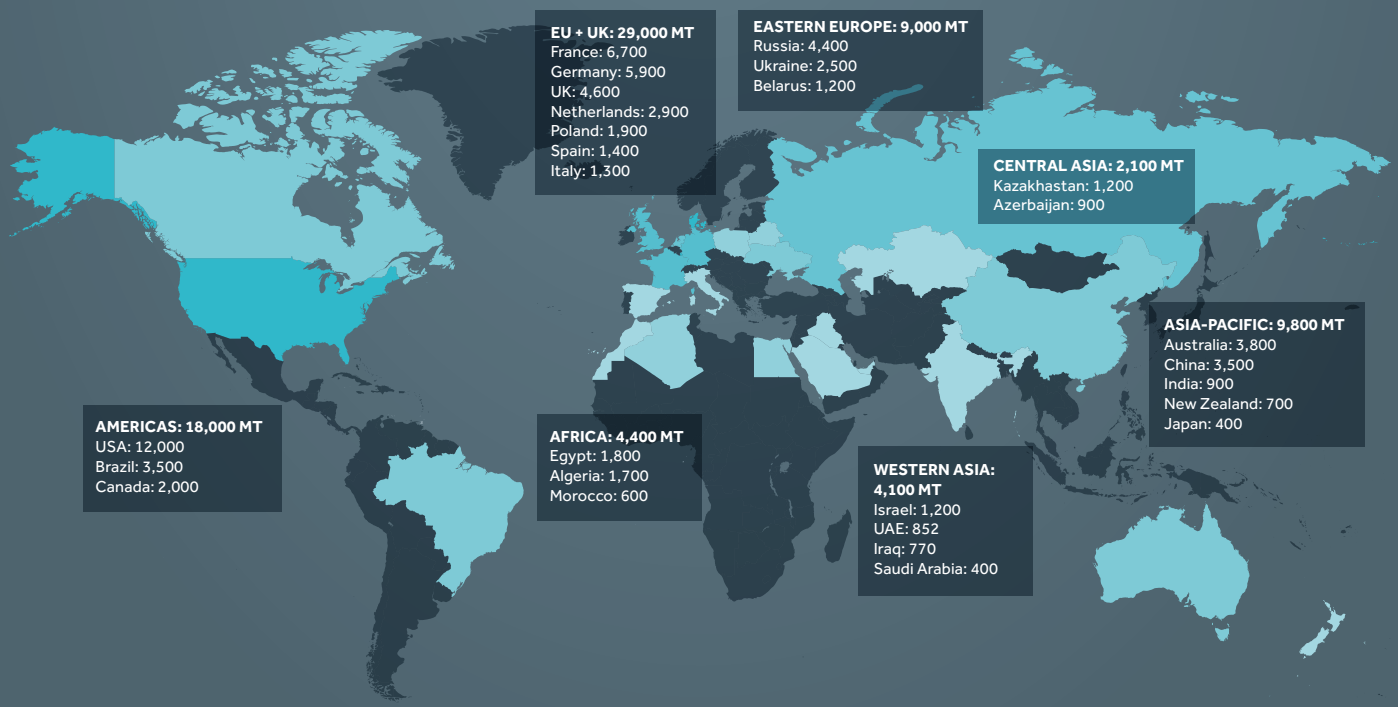
Source: Aegean Exporters' Associations Shipment Reports.



Turkish dried apricots are exported to over 140 countries worldwide. Based on the average exports over the last five seasons, the EU, the USA, and the Asia-Pacific region are key markets for Turkish dried apricots. Europe dominates imports, with the EU + UK accounting for approximately 29,000 MT annually. The top importers include France (6,700 MT), Germany (5,900 MT), and the UK (4,600 MT). The Americas follow with 18,000 MT, primarily driven by the USA (12,000 MT), the largest single-country importer. In the Asia-Pacific region, imports totaled 9,800 MT, led by Australia (3,800 MT) and China (3,500 MT). Russia is the top importer in Eastern Europe, accounting for nearly half of the region's total imports. Meanwhile, Western Asia and African countries contribute moderately to the overall trade in Turkish dried apricots (Figure 6).

Figure 6. Top Destinations of Turkish Dried Apricots, 5-Year Average, Metric Tons

Source: Aegean Exporters' Association.



Advances in Turkish Dried Apricot Production: Towards a More Sustainable Future

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Turkish apricots. Photo: Aegean Exporters' Associations.

Türkiye is a major global producer and exporter of dried apricots. Due to the high compatibility of the environment and local varieties, production destined for commercial sun-drying has been concentrated in Malatya and its surroundings. The industry is progressing toward a sustainable future through enhanced agricultural practices, research, and innovation.

History

Turkish apricot cultivation dates back thousands of years, with Malatya, known as the apricot capital of Türkiye, being a key hub for production. Revered in Turkish culture as the "tree of life," the apricot symbolizes health and prosperity. The apricot's impact on Turkish culture extends to the culinary arts as well. It is a versatile ingredient used in a variety of traditional Turkish dishes, from desserts to savory meals. Apricots are often used to make jam, juices, and even alcoholic beverages like apricot liquor. *Pestil*, a sweet made from apricot juice, is commonly consumed in Central Anatolia, while apricot *sucuk* (sausage), which also contains walnuts, is another well-known delicacy.

Malatya apricots are globally recognized for their exceptional quality, especially in dried form, and have earned geographical indication status in Türkiye and the EU. This recognition highlights their unique flavor and texture, making them a symbol of Türkiye's agricultural legacy and a prized product on the international market.

Sustainable Production and Trade of Turkish Dried Apricots

Sustainability has become a key focus of the Turkish dried apricot value chain, with a view to ensuring that this cherished fruit thrives for future generations. Türkiye's dried apricot industry values the hard work of farmers, families, and consumers who enjoy the unique taste and health benefits of these products. This respect drives us to explore sustainable methods, enhance production techniques, and strengthen the industry to ensure its growth and success in the years to come.

The industry is committed to finding and implementing methods that reduce waste, increase productivity, and safeguard natural resources, ensuring the long-term sustainability of Türkiye's apricot farming. Türkiye produces about 51% of the world's dried apricots. Varieties grown in Türkiye are well-suited to sun-drying, resulting in a soft texture, a sweet taste, and easy pit

removal. These apricots are unique for being "whole pitless." The main varieties for drying are Hacihaliloğlu and Kabaaşı, known for their sweet, detached seeds and similar fruit shapes.

This approach to using natural resources responsibly results in a whole food product that provides essential nutrients for optimal health. The industry continuously supports research exploring the full range of nutritional benefits of Turkish dried apricots and their positive effects on human health.

Turkish dried apricots are cultivated, harvested, and processed in compliance with both national and international quality standards. Both organic farming and Good Agricultural Practices (GAP) have gained prominence in Turkish apricot production. Organic agriculture in Türkiye has been regulated since 1994, aligning with EU standards, while GAP standards follow strict legal frameworks. The government supports the transition to organic and GAP-certified farming, offering incentives to producers in Malatya and surrounding provinces.

The production, handling, and export of Turkish dried apricots generate thousands of jobs and contribute significantly to the local and national economy, supporting livelihoods and strengthening the agricultural sector. Social sustainability, including legal labor practices, is also a priority for the industry.

The success of the Turkish dried apricot industry relies on the dedicated efforts of farmers, processors, and exporters who work together to produce high-quality products. The industry fosters education and sustainable practices to ensure future generations are equipped to continue and enhance its work. Training programs on EU directives and the Green Deal are becoming increasingly important to improve sustainable production and trade in the sector.

Sun-drying Turkish apricots.
Photo: Aegean Exporters' Associations.

"Sustainability has become a key focus of the Turkish dried apricot value chain, with a view to ensuring that this cherished fruit thrives for future generations."

The Turkish dried apricot sector has remained a global leader for decades, exporting to over 100 countries. In 2024, Türkiye exported 76,972 metric tons of dried apricots, generating US$411.27 million in revenue. The export market continues to grow, driven by demand from health-conscious consumers.

Research

Research is pivotal in improving the quality and sustainability of Turkish apricot production and trade. In 1937, during the early days of the Republic of Türkiye, the Apricot Research Station was established in Malatya to research and improve apricot cultivation. Since then, it has continued its activities in various fields, including apricot cultivar development, quality improvement, disease management, and the advancement of agricultural techniques under the Ministry of Agriculture and Forestry and with the participation of stakeholders.

In Malatya, apricots are traditionally harvested, sun-dried, and marketed. However, they lose their quality and color over time, and special treatment is required to preserve their world-renowned taste. While apricots had been sun-dried for centuries, sulfur treatment was introduced in the early 1900s. Government agencies, exporters' associations, and universities in Türkiye have extensively studied apricot cultivation, sulfur treatments, pests and diseases, harvest and post-harvest handling, and processing methods.

In recent years, the projects financially supported by the Dried Fruit Sector Board, which operates under the Aegean Dried Fruit and Products Exporters' Association, and carried out by the Apricot Research Institute and Ege University, have been of great importance in terms of research activities. These projects include the development of a seed removal machine, projects to improve quality and yield, and a project to study the impact of sulfur loss on quality. The start of licensed warehousing in the dried apricot sector will also contribute to the overall quality of Turkish dried apricots through controlled storage conditions and traceability. These projects have improved drying techniques for dried apricots, preserving their nutritional value and extending their shelf life. This ensures that Turkish apricots maintain high quality and safety standards when reaching international markets.

Conclusion

The Turkish apricot industry is advancing towards a sustainable future through improved agricultural practices, research, and innovation. As a global leader in apricot production and exports, Türkiye's apricots are valued for their quality, nutritional benefits, and cultural significance. Ongoing research and the rising demand for eco-friendly products emphasize the global importance of Turkish apricots. With continued investment in sustainable farming, the industry's future looks promising, ensuring long-term sustainability and resilience.

Dried Apricots: A Nutrient-Dense Addition to a Healthy Diet

Dried apricots offer so much more than just natural sweetness. They are high in key nutrients like fiber, potassium, vitamin A, vitamin E, and copper, and are a source of vitamin B_3 and iron,[1] making them an easy and delicious way to support overall well-being.

Digestive Health

Dried apricots are an excellent way to boost your intake of dietary fiber, which plays a crucial role in supporting digestive health. They contain both soluble and insoluble fiber,[2] each contributing to different aspects of gut function. Soluble fiber may help lower glucose levels as well as help lower blood cholesterol, while insoluble fiber adds bulk to stool, which may promote regular bowel movements and help prevent constipation.[3]

Cardiovascular Benefits

Dried apricots are high in potassium, a mineral that plays a crucial role in regulating blood pressure. Potassium may help to counterbalance the effects of sodium, which is known to raise blood pressure. By promoting the excretion of sodium and relaxing blood vessel walls, potassium may help to lower blood pressure, contributing to overall cardiovascular health.[4] The World Health Organization (WHO) recommends that adults increase their potassium intake from food sources to reduce blood pressure and risk of cardiovascular disease, stroke, and coronary heart disease.[5]

Skin and Vision Health

Given that they contain the provitamin A compound beta-carotene in abundance,[6] dried apricots are considered to be high in vitamin A. Among other health benefits, vitamin A contributes to the maintenance of normal skin and mucous membranes, as well as to the maintenance of normal vision.[7] Dried apricots are also high in the powerful antioxidant vitamin E, which contributes to the protection of cells from oxidative stress.[7] Together, these nutrients work in harmony to promote both skin vitality and optimal eye health.

Sustained Energy Without Blood Sugar Spikes

Despite their sweetness, dried apricots have a low glycemic index,[8] meaning that they provide a steady release of energy without causing sharp spikes in blood sugar levels. This makes them a favorable carbohydrate source for individuals looking to maintain stable energy levels throughout the day. For those with active lifestyles, dried apricots serve as a natural energy booster thanks to vitamin B_3, which contributes to normal energy-yielding metabolism and to the reduction of tiredness and fatigue.[7] Their combination of nutrients and balanced glycemic response makes them a smart choice for sustained vitality.

Filling Nutritional Gaps

Thanks to nutrients such as copper and iron, dried apricots help address common nutrient gaps, contributing to overall wellness. Copper contributes to the normal function of the immune system and helps to maintain normal connective tissues, while iron contributes to normal oxygen transport in the body.[7]

Conclusion

Incorporating dried apricots into your diet is a simple and delicious way to boost overall health. Their rich nutrient profile supports digestive and cardiovascular health, skin and vision wellness, and sustained energy levels. Additionally, their key minerals help fill common nutritional gaps, making them a valuable addition to a balanced diet. They can be enjoyed on their own, added to trail mixes, oatmeal, yogurt, and smoothies, or used in baking and homemade energy bars as a natural sweetener. Their chewy texture and rich flavor make them a healthier alternative to processed snacks, helping to curb cravings while providing essential nutrients.

KEY HEALTH BENEFITS

- Digestive health
- Cardiovascular benefits
- Skin health
- Vision health
- Low glycemic index
- Immune function
- Healthy connective tissues
- Oxygen transport

HIGH IN:
Fiber, potassium, vitamin A, vitamin E, and copper

SOURCE OF:
vitamin B_3 and iron

References:
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Cheese Nougat With Nuts and Dried Apricots

Servings: 8

Ingredients:

- 240 g Camembert cheese
- 60 g cream cheese
- 60 ml cream or vegan substitute
- 50 g dried apricots
- 25 g almonds
- 25 g pistachios
- 25 g pecans
- 25 g cashews

Preparation:

1. Cut the Camembert cheese into pieces and add it to a pot along with the cream cheese and cream or vegan substitute. Heat until everything melts, then blend until you obtain a thick, creamy mixture.
2. Add the nuts (almonds, pistachios, pecans, and cashews) and chopped dried apricots to the mixture. Pour into a rectangular mold and decorate with more whole nuts. Refrigerate for three to four hours until it solidifies.
3. Unmold and cut.

Dried Apricots in the Market

The apricot, in its dried form, brings a natural sweetness and a rich depth of flavor to tasty treats across the globe. From chewy to crispy, subtly sweet to boldly spiced, dried apricots appear in an impressive range of products. Whether paired with nuts for an energy boost, freeze-dried for a tart crunch, or infused with chili for a fiery kick, this fruit proves its versatility time and again. Here is a selection of innovative and flavorful products that showcase the many ways dried apricots delight taste buds worldwide.

Selçuk Sofit Apricot & Walnut Energy Disc

Türkiye

A 100% vegan energy snack with no added sugar. Perfectly portioned for athletes, easy to carry, and great before training or competition!

https://selcukfood.com/products/

Trader Joe's Simply Amazing Soft Dried Apricots

USA

Sun-ripened Turkish apricots, gently steamed for a soft, velvety texture. Naturally sweet with floral notes and a vibrant tang.

https://www.traderjoes.com/home/products/pdp/simply-amazing-soft-dried-apricots-078443

Nature's Turn Freeze-Dried Sour Apricot Crisps

USA

For sour lovers, these freeze-dried apricots offer a tart, crunchy snack. Gluten-free and paleo-friendly, they are perfect for on-the-go munching or for adding to recipes.

https://naturesturn.com/collections/freeze-dried/products/copy-of-freeze-dried-apricot-crisps

Fustuq & Hail Apricot Balls With Nuts

UAE

Made with premium Malatya apricots, these luxurious bite-sized treats offer unique, elegant hospitality in stylish packaging, perfect for gifting or special occasions.

https://fustuq-hail.com/en/shop/driedfruits/apricot-dried-nuts-mix-1300g/

Chuza Dried Apricot With Chili Seasoning

Mexico/USA

Expertly seasoned with a signature chili blend, these dried apricots deliver a bold and irresistible mix of sweetness and spice.

https://chuza.com/collections/all-products/products/spicy-apricot

Drybox Sun-Dried Apricots

USA

These organic Turkish apricots are naturally sweet, soft, and juicy. Ideal for snacking, baking, or cooking. Vegan, gluten-free, and packaged at the source for freshness.

https://www.tastedrybox.com/products/unsulfured-organic-sun-dried-turkish-apricots-big-pack-16-oz

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Nut Consumption May Improve Healthy Lifespan in Older Adults

PROF. JORDI SALAS-SALVADÓ

Professor, Human Nutrition Unit (URV, IISPV, CIBERobn), and Chairman of the INC World Forum for Nutrition Research Dissemination.

IN COLLABORATION WITH PHD STUDENT JOSUÉ ALBERTO PÉREZ ACOSTA

Over the past two centuries, global life expectancy has increased significantly, underscoring the importance of preserving a healthy lifespan.[1,2] Hence the concept of "disability-free survival" —the period of life spent in good health— which focuses on maintaining functional independence, enhancing overall well-being, and improving quality of life, particularly among older adults, emerged as a public health priority.[3]

Multiple factors may decrease the healthy lifespan of older populations, with non-communicable diseases (NCDs) being the leading contributors to the global disease burden in terms of disability-adjusted life-years and mortality, surpassing other major causes such as infectious diseases and injuries.[4,5] In this framework, the primary objectives for the elderly population should include the preservation of physical and cognitive functions, along with the maintenance of high standards of life quality and independence.[6] Achieving these goals requires tackling the challenges posed by NCDs and implementing strategies to reduce the gap between health span and lifespan.

Diet is one of the most influential yet modifiable risk factors for NCDs, ranking as the second most critical determinant of health.[5] Consequently, numerous countries are prioritizing initiatives to encourage healthier dietary patterns. These recommended diets are consistently characterized by high consumption of nutrient-rich foods such as vegetables, fruits, legumes, nuts, whole grains, and unsaturated vegetable oils.[7,8] In this context, nut consumption has been studied for its potential role in reducing the risk of NCDs and its impact on healthy lifespan.

Several observational studies have suggested that individuals who frequently consume nuts have less risk of NCDs than non-consumers or sporadic consumers of nuts. An umbrella review of observational studies published in 2021 highlights a potential association between nut consumption and a decreased risk of colon cancer, hypertension, cardiovascular-disease-related mortality, cancer-related mortality, and ischemic stroke.[9] Other systematic reviews and meta-analyses of observational studies have also demonstrated these beneficial effects of nut consumption on disease and mortality risk.

Results from a recent prospective cohort study[3] suggest that eating nuts regularly is associated with significant health benefits in older adults, particularly the reduction of disability, dementia, and mortality risks. The researchers found that daily nut consumption, compared to infrequent or no consumption, is associated with a 23% decrease in the likelihood of experiencing these adverse health outcomes. This relationship contributes to an improved healthy lifespan, even in older adults whose dietary quality may not be optimal. Therefore, the authors concluded that nut consumption not only decreases the risk of disease and mortality but also has beneficial effects on healthy lifespan —the second objective of a medical doctor when caring for geriatric patients.

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Interestingly, some studies have noted a potential sexual dimorphism in the health benefits of nut consumption, suggesting greater cardiovascular protection in women than in men, potentially attributed to hormonal interactions that influence metabolic and inflammatory pathways. For instance, findings from the Women's Health Study[10] indicate that regular nut consumption —defined as at least twice a week— was significantly associated with reduced cardiovascular disease mortality in women. The protective effect of nut consumption in this cohort was partially attributed to favorable changes in total cholesterol levels, improved glycemic control, and a reduction in systemic inflammatory markers, underlining the multifaceted benefits of nut consumption in mitigating cardiovascular risks. More research on this topic is warranted in the future in order to better define the recommendations.

The health benefits of consuming nuts can be attributed to their exceptional nutrient profile, which includes unsaturated fats, fiber, protein, vitamins (folate, niacin, vitamin E), and minerals (selenium, magnesium, calcium, potassium). These components work synergistically to exert anti-inflammatory, antioxidant, and cardiometabolic effects, which are critical for preserving physical and cognitive functions in older adults.[3,9,11]

An effective strategy to help incorporate nuts into a daily diet is to replace less nutritious snacks with a range of nuts.[12] This substitution not only improves the overall nutritional profile of the diet but also encourages healthier dietary habits across diverse populations, thereby helping to increase healthy lifespans and long-term health outcomes.[3,12]

In the aforementioned study[3] on disability, moderate nut consumption —i.e., eating nuts at least twice a week— was linked to a reduced risk of disability, dementia, and mortality in older adults. Incorporating nuts into daily dietary habits, for example by replacing unhealthy snacks with nuts, may improve overall nutrition and encourage healthier eating habits. Adding nuts to the diet may decrease the risk of NCDs and potentially extend healthy lifespans in older adults.[3]

INC World Forum for Nutrition Research and Dissemination

"Nut consumption not only is associated with a lower risk of chronic disease and mortality but also seems to reduce disability and increase quality of life in older people."

New Scientific Studies

INC-Funded Study Shows Longer-Term Mixed Nut Consumption May Reduce Cardiovascular Risk in Older Adults

Nijssen, K. M. R., et al. (2025).

Effects of Longer-Term Mixed Nut Consumption on Lipoprotein Particle Concentrations in Older Adults with Overweight or Obesity.

Nutrients, 17(1), 8.

This study showed that longer-term consumption of mixed nuts may lower cardiovascular disease (CVD) risk in older adults with obesity or overweight, potentially aiding in the development of accessible dietary interventions to improve cardiovascular health in at-risk populations.

The newly published study builds on earlier research that showed consuming mixed nuts over a long-term period significantly reduced total and LDL ("bad") cholesterol levels. It aimed to provide a more comprehensive understanding of the relationship between nut consumption and lipoprotein-related CVD risk.

The study found that eating mixed nuts significantly improved blood lipid levels, creating a more heart-healthy profile, including changes in certain lipoprotein subclasses related to better heart health. The results provide deeper insights into how nuts can influence blood lipids.

The study was a randomized, controlled crossover trial that analyzed the effects of the daily consumption of mixed nuts on lipoprotein particle levels in older adults with obesity or overweight. Twenty-eight participants completed two 16-week phases: a control period with no nut consumption and an intervention period where they consumed 60 grams/day of mixed nuts (15 g each of walnuts, pistachios, cashews, and hazelnuts). The two phases were separated by an 8-week washout period. The investigators evaluated the effect of nut consumption on lipoprotein particle numbers, sizes, and lipid content across various lipoprotein subclasses using an advanced NMR metabolomics platform.

This marks the third article to emerge from an INC-funded study on the effects of long-term mixed nut consumption in older adults.

Study Finds Premeal Pistachio Supplementation Improves Cardiometabolic Profile in Patients With Prediabetes

Ashwini, K., et al. (2025).

Effect of Premeal Pistachio Supplementation on Cardiometabolic Risk Factors Among Asian Indian Adults with Prediabetes: A Randomized Controlled Trial.

The Journal of Nutrition, S0022-3166(24)01231-8.

This randomized controlled trial sought to evaluate the effect of premeal pistachio supplementation on cardiometabolic risk factors in Asian Indian adults with prediabetes.

A total of 120 participants with prediabetes were recruited and randomly assigned to one of two groups. The intervention group ate 30 grams of pistachios before breakfast and another 30 grams before dinner for 12 weeks, while the control group followed a routine diet that excluded nuts. Researchers assessed the effect of pistachio supplementation on cardiovascular risk markers, including blood sugar (glycemic) indicators.

The findings showed that this program of premeal pistachio supplementation significantly improved blood sugar control and lowered post-meal blood glucose levels in Asian Indians with prediabetes, without leading to weight gain. This study is among the first to investigate these effects in Asian Indians. The findings suggest that preloading meals with pistachios could promote satiety and help stall patients' progression from prediabetes to diabetes.

The study was led by Dr. V. Mohan, Chairman of the Madras Diabetes Research Foundation in Chennai, India, in collaboration with researchers from the Harvard T.H. Chan School of Public Health, USA, including Dr. Walter Willett, Dr. Frank Hu, and Dr. Shilpa N. Bhupathiraju, as well as Prof. Jordi Salas-Salvadó from Rovira i Virgili University, Spain. This research was supported by American Pistachio Growers.

Research Supports Eating Pecans as a Heart-Healthy Snack

Hart, T. L., et al. (2025).

Consuming Pecans as a Snack Improves Lipids/Lipoproteins and Diet Quality Compared to Usual Diet in Adults at Increased Risk for Cardiometabolic Diseases: A Randomized Controlled Trial.

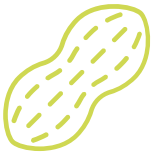
The American Journal of Clinical Nutrition, S0002-9165(25)00057-7. Advance online publication.

This study examined how substituting common snack foods with pecans affects vascular health, risk factors for cardiometabolic diseases, and diet quality.

The study was a 12-week randomized controlled trial involving 138 adults who had at least one criterion for metabolic syndrome and were free of cardiovascular disease. Participants either followed their usual diet or replaced their usual snacks with 57 grams of pecans per day. Changes in heart and blood vessel health, cholesterol levels, blood sugar, and overall diet quality were measured at baseline and after the intervention.

After the intervention, participants who ate pecans had lower levels of total cholesterol, LDL ("bad") cholesterol, and triglycerides, all of which are linked to heart health. Their overall diet quality also improved.

This study was funded by the American Pecan Council.



Study Finds Home-Based Peanut Immunotherapy Effective for Children With High-Threshold Allergy

Sicherer, S. H., et al. (2025).

Peanut Oral Immunotherapy in Children with High-Threshold Peanut Allergy.

NEJM Evidence, 4(3), EVIDoa2400306.

This study found that children with high-threshold peanut allergies who consumed gradually increasing doses of peanut butter over 18 months were able to tolerate significantly larger amounts of peanut protein without allergic reactions.

A total of 73 participants were randomly assigned to either an oral immunotherapy group, which consumed store-bought peanut butter, or a control group, which followed peanut avoidance. The goal was to determine the difference between the groups in the proportion of participants who could tolerate a two-dose-level increase. To assess sustained peanut tolerance, those who reached the threshold were tested again after 16 weeks of regular ingestion followed by 8 weeks of abstinence.

All children in the oral immunotherapy group successfully tolerated 9,043 mg of peanut protein, compared to 21% of the avoidance group. Furthermore, 68.4% of the children who received oral immunotherapy maintained their tolerance after the abstinence period, compared to only 8.6% in the avoidance group. No serious adverse events were reported, and all dosing reactions were mild.

Virus-Like Particle Vaccine Shows Promise for Peanut Allergy Treatment

Layhadi, J. A., et al. (2025).

Ara h 2-expressing cucumber mosaic virus-like particle (VLP Peanut) induces in vitro tolerogenic cellular responses in peanut-allergic individuals.

The Journal of Allergy and Clinical Immunology, 155(1), 153–165.

This study suggests that a novel vaccine targeting peanut allergy could provide a safe and effective alternative to existing treatments.

Researchers developed a vaccine using a cucumber mosaic virus-like particle expressing the peanut allergen component Ara h 2. This approach aims to reprogram the immune system to tolerate peanut exposure rather than trigger allergic reactions. The vaccine's tolerogenic properties were assessed in blood samples from six peanut-allergic children and its safety was tested in an open-label phase 1 trial through a skin prick test in six peanut-allergic adults.

The findings showed that the vaccine had beneficial biochemical properties and was fit for use in further clinical studies. The study also found that the vaccine was safe and well tolerated.

BAS VAN DEN BRINK

SUSTAINABILITY DIRECTOR
INTERSNACK GROUP
GERMANY

After studying law in the Netherlands, Bas van den Brink took up a role in South Africa working on EU trade agreements. This led to a growing interest in sustainability and supply chains and a job with the Sustainable Trade Initiative (IDH), Europe's leading sustainable supply chain program, dealing with supply chain issues in all manner of goods and food products, including nuts. Bas joined Intersnack's Sustainability team in 2016, becoming Sustainability Director in 2021. He is responsible for driving sustainability programs across the Intersnack Group, which is one of the market leaders in savory snacks, present in over 30 countries across Europe, Asia, and Australia.

How is sustainability integrated into Intersnack's overall business strategy?

Intersnack's aim is to "create positive impact, snack by snack" —in other words, to use our influence to help build an ethical and sustainable food system that supports better futures for everyone involved. We know this is only achievable through determination and collaboration. That's why we're on a journey with our teams and business partners to create snacks people love and trust.

Intersnack's journey to become a more sustainable business began nearly 20 years ago. Since then, we have continuously built our efforts, and sustainability is now fundamental to all our operations and integrated into every area of our business. Our strategy rests on four pillars, designed to deliver benefits for people and planet alike:

- **Consumer:** innovation for better, tasty choices.
- **Environment:** reducing our footprint through our zero-loss approach.
- **Employees:** inspiring our people to reach their full potential.
- **Social:** leading with responsible value chain practices.

Achieving lasting progress demands joint action from across the Intersnack Group. At all levels, we work together to exchange information, leverage regional insights, and enhance collective understanding and learning as we embed sustainability further into the fabric of our business.

What role does innovation play in achieving your sustainability goals?

When it comes to sustainability, there's no time like the present. The next decade will require decisive action to bring about real change. Topics like climate change and ethical sourcing will require joint action and commitment across the supply chain. That's why we have set ambitious climate goals for Intersnack that align with the Science Based Targets initiative (SBTi). We are accelerating innovations to manufacture our products with less energy and less waste, investing in more efficient production methods and cutting food waste.

Combining a more efficient use of resources with circular design, innovations, and reduction of waste can have a major impact on the reduction of our greenhouse gas emissions. So, our Packaging Pledge makes a major contribution to the achievement of our climate ambition, through the reduction, optimization and recyclability of our packaging. In this area, we are working closely with industry partners such as packaging and materials suppliers to develop new innovations that can really make a difference.

Can you discuss Intersnack's targets around carbon emissions and waste reduction?

To support global climate action, one of our most important tasks is to reduce our emissions footprint not just in our direct operations but also in our supply chain. In our operations, we have succeeded in reducing our emissions per ton of product (Scope 1 and 2) by 25% since 2010. In 2023, we raised the bar, updating our climate targets in line with SBTi standards and introducing absolute reduction targets of 50% for our operations and 30% for our supply chain by 2032.

However, the emissions in our value chain (Scope 3) still represent the largest share of our footprint —around 85%. To drive towards our targets in Scope 3, we continue to

optimize our transport logistics whilst engaging directly with our suppliers to promote sustainable practices as well as addressing our packaging footprint through reduction and recyclability.

In fact, we recognize that our agricultural supply chains are fundamental to our success in this area, contributing to almost half of our supply chain emissions. So, we are working to promote sustainable agriculture practices that nurture more resilient, responsible, and productive supply chains to reduce our carbon footprint and support the long-term viability of farming communities.

We know that achieving our SBTi target will take concerted efforts from Intersnack, but we also need buy-in from our complex network of suppliers, service providers, and partners.

"When it comes to sustainability, there's no time to waste."

How has Intersnack reduced its environmental footprint?

As mentioned before, the approval and roll-out of our SBTi targets across the Intersnack Group is one of our recent major initiatives on the environmental side. Linked to this, in 2023 we launched our sustainable agriculture program. It supports our potato farmers in enhancing their sustainable agricultural practices. Besides that, we are working strategically with many of our suppliers to cooperate in CO_2 equivalent monitoring and developing understanding as to how to achieve emissions reductions.

At the same time, we continue our ongoing efforts in reducing emissions from waste and packaging.

To drive improvement, we monitor our own sustainability performance continuously. Whilst sustainable progress is driven from within, we're honored that our efforts are also being recognized externally. For instance, Intersnack achieved an EcoVadis Gold rating for the second year running in 2024. Our EcoVadis score put Intersnack amongst the top 5% of all companies across all industries rated by EcoVadis internationally and in the top 2% for the food industry.

How does Intersnack approach sustainable sourcing, particularly for raw materials such as nuts and dried fruits?

Since we first set out on our sustainability journey, people have been at the heart of our efforts. With this comes a firm belief that good, safe working conditions are essential to a successful and responsible business.

And we know that sustainable products start with responsible sourcing practices. As a company with a complex, diverse, and global supply network, we aim to work with suppliers who share our commitment to upholding human rights and providing safe and decent working conditions. We are committed to preventing and addressing social risks that may arise in the supply chain. Through our Supplier Code of Conduct and Responsible Sourcing Policy, we drive social compliance across our supply chain. Through targeted audits, projects, and supplier development, we are continually contributing to assuring good supply chain labor standards.

Looking at initiatives in our nuts supply chain, it is our Honest Cashew initiative in which we have built a fully transparent cashew supply chain and guaranteeing a safe and decent place to work in cashew processing. This is done through our 100% in-house production with our single-roof processing approach.

We also collaborate and engage with multiple organizations that promote human rights and adoption of responsible sourcing practices in the supply chain. This includes pre-competitive partnerships such as the Competitive Cashew Initiative (ComCashew), the Sustainable Nut Initiative (SNI), the Sustainable Spices Initiative (SSI), the Roundtable on Sustainable Palm Oil (RSPO), and the Forest Stewardship Council (FSC).

How does Intersnack collaborate with farmers, suppliers, and other stakeholders to promote sustainability in the production of nuts and dried fruits?

Intersnack's approach is to build direct links with our suppliers, generating longstanding and trusted partnerships which are vital to building supply chain capacity, knowledge, and profitability for all involved. We engage various partners and industry peers in actions to improve supply chain working conditions, crop yields, product quality, and farmer livelihoods.

A good example of this collaboration is the Sustainable Agriculture Initiative (SAI) Platform peanuts project in Argentina. Through our membership in the SAI Platform, we are participating in a project to assess the role that sustainable agriculture can play in mitigating emissions and building climate resilience for peanut growers. The project will engage 25 regional farms to establish their emission and sustainable agricultural practice baselines, using the Cool Farm Tool and the SAI Platform's Regenerating Together Framework.

What are some of the most exciting sustainability initiatives that Intersnack is planning for the near future?

Some of the most exciting areas for us are also the most challenging; to meet our climate goals we need to achieve lasting and significant change in the way we grow, produce, pack, and transport our tasty products. This will not be a linear process. We will continue to evolve our approach by continuously improving our knowledge, accelerating learnings, and building partnerships.

Our climate ambition and social compliance are at the heart of our sustainability journey, but these topics affect the entire supply chain. As a sector, we have a shared responsibility to ensure our categories are managed in ways that will future-proof them, despite the growing influence of climate change, especially on crops and agriculture.

That is why we will continue to work closely with our suppliers everywhere, make change where it is necessary, and develop our sector together so that the end consumer can trust the product they enjoy —and indeed be sure it will still be available for the long term.

Hazelnut Committee of Chile Defines Global Positioning of the Country's Hazelnuts as Strategic Objective for 2025

The Hazelnut Committee of Chile is an organization that brings together producers, exporters, and key players in the hazelnut industry in the country, with the purpose of promoting the sustainable and competitive growth of this sector. Our mission is to consolidate Chile as a leading supplier of high-quality hazelnuts worldwide, strengthening the image of the Chilean product and opening new opportunities for its positioning in foreign markets.

One of the central objectives of our work for 2025 is the development of the image of Chile's hazelnut crop, highlighting the attributes that differentiate us and that are increasingly valued by global consumers. Our hazelnuts are grown under strict traceability standards, guaranteeing food safety and transparency at each stage of production. In addition, we work under sustainability principles, prioritizing responsible agricultural practices that care for the environment, optimize water use, and respect biodiversity.

The vision of the Hazelnut Committee of Chile is to project the country as a leader in hazelnut production in the Southern Hemisphere, recognized for offering a premium, reliable product produced in compliance with good agricultural, labor, and environmental practices. To achieve this, we develop research, training, and promotion initiatives that contribute to improving the competitiveness of the sector and building a solid reputation in the main markets of the world.

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Photo: Palma Convention Center. © Meliá Hotels International, S.A.

Mallorca

42ND INC WORLD NUT AND DRIED FRUIT CONGRESS

MAY 8-10, 2025

10 product round tables

2 specialized seminarss

1 keynote speaker

5 official hotels

3 daily coffee breaks & buffet lunch

3 evening social events

INC international Nut&DriedFruit

Three Days of Insights and Opportunities

Mallorca
42ND INC WORLD NUT AND DRIED FRUIT CONGRESS

PRELIMINARY PROGRAM

Tuesday, May 6

12:00 pm – 4:30 pm
CONGRESS REGISTRATION

Wednesday, May 7

6:00 am – 2:00 pm
GOLF & TENNIS DAY
Sponsored by Valley Pride

8:00 am – 4:30 pm
CONGRESS REGISTRATION

Thursday, May 8	Friday, May 9	Saturday, May 10
8:00 am – 4:30 pm CONGRESS REGISTRATION	8:00 am – 4:30 pm CONGRESS REGISTRATION	8:00 am – 2:00 pm CONGRESS REGISTRATION
9:00 am – 3:00 pm TOUR FOR ACCOMPANYING PERSONS	9:00 am – 3:00 pm TOUR FOR ACCOMPANYING PERSONS	
8:00 am – 4:30 pm Nutfruit Plaza ALL-DAY COFFEE EXHIBITION BOOTHS	8:00 am – 4:30 pm Nutfruit Plaza ALL-DAY COFFEE EXHIBITION BOOTHS	8:00 am – 1:30 pm Nutfruit Plaza ALL-DAY COFFEE EXHIBITION BOOTHS
	Nutfruit Plaza MEETING AREA *Sponsored by Al Jameel International*	
8:00 am – 8:30 am MORNING COFFEE *Sponsored by Almond Board of California*	8:00 am – 8:30 am MORNING COFFEE *Sponsored by Almendras Llopis*	8:00 am – 8:30 am MORNING COFFEE *Sponsored by Willamette Hazelnut*
8:30 am – 9:30 am CONGRESS OPENING INC SUSTAINABILITY PROGRAM: A NEW GLOBAL INITIATIVE	8:30 am – 9:30 am WALNUTS ROUND TABLE	8:30 am – 9:30 am HAZELNUTS ROUND TABLE
9:30 am – 10:30 am ALMONDS ROUND TABLE	9:30 am – 10:30 am BRAZIL NUTS, PINE NUTS, AND PEANUTS ROUND TABLE	9:30 am – 10:30 am DATES, APRICOTS, AND FIGS ROUND TABLE
10:30 am – 11:00 am COFFEE BREAK *Sponsored by Almond Board of California*	10:30 am – 11:00 am COFFEE BREAK *Sponsored by Almendras Llopis*	10:30 am – 11:00 am COFFEE BREAK *Sponsored by Willamette Hazelnut*
11:00 am – 12:00 pm RAISINS, PRUNES, AND CRANBERRIES ROUND TABLE	11:00 am – 11:45 am PECANS ROUND TABLE	11:00 am – 11:30 am INC AWARDS: SUSTAINABILITY AND INNOVATION
12:00 pm – 12:30 pm NUTRITION RESEARCH SEMINAR Chaired by Prof. Jordi Salas Salvadó, INC World Forum for Nutrition Research and Dissemination	11:45 am – 12:30 pm KEYNOTE SPEAKER Toni Nadal, Tennis Coach and Ambassador of Rafa Nadal Academy, Spain	11:30 am – 12:45 pm CONTRACTS AND CONSEQUENCES Chaired by Giles Hacking, Chair of the INC Business Integrity Committee
12:30 pm – 1:30 pm PISTACHIOS ROUND TABLE	12:30 pm – 1:30 pm CASHEWS ROUND TABLE	12:45 pm – 1:30 pm MACADAMIAS ROUND TABLE
1:30 pm – 3:00 pm WORKING BUFFET LUNCH *Sponsored by Setton Pistachios of Terra Bella*	1:30 pm – 3:00 pm WORKING BUFFET LUNCH *Sponsored by Royal Nuts*	1:30 pm – 3:00 pm WORKING BUFFET LUNCH *Sponsored by Qiaqia Food Co. Ltd*
3:00 pm – 3:30 pm SPONSORED PANEL SESSION *Sponsored by MSC Mediterranean Shipping Company*	3:00 pm – 3:30 pm SPONSORED PANEL SESSIONS *Sponsored by Insort*	
3:30 pm – 4:00 pm SPONSORED PANEL SESSION *Sponsored by Laitram*	3:30 pm – 4:00 pm SPONSORED PANEL SESSIONS *Sponsored by Bühler*	
6:00 pm – 8:00 pm (Buses depart at 5:30 pm) WELCOME COCKTAIL Parc de la Mar *Sponsored by Importaco*	7:00 pm – 10:00 pm (Buses depart at 6:00 pm) CASUAL BUFFET DINNER Port Adriano Marina *Sponsored by Wonderful Almonds & Pistachios*	7:30 pm – 12:00 am (Buses depart at 7:00 pm) COCKTAIL, GALA DINNER AND BALL Palma Convention Center *Sponsored by Chilenut*

Keynote Speaker

TONI NADAL

Tennis Coach
Ambassador of Rafa Nadal Academy, Spain

Toni Nadal is a Spanish tennis coach. He started working as Head Coach of the Manacor Tennis Club, where he led many of his students to the top places in the Spanish ranking. He has been Rafa Nadal's mentor and coach for 27 years. He believes that a sportsman should develop three main aspects: technical skills, character, and the right set of values. As a coach, he has one of the best track records in the history of tennis: 74 tournaments in total, 16 Grand Slam tournaments (10 French Opens, 3 US Opens, 2 Wimbledons and 1 Australian Open), 4 Davis Cups, and 2 Olympic Games. At present, Toni Nadal combines his work as an ambassador for the Rafa Nadal Academy with his job as a speaker for sports coaches, universities, and companies.

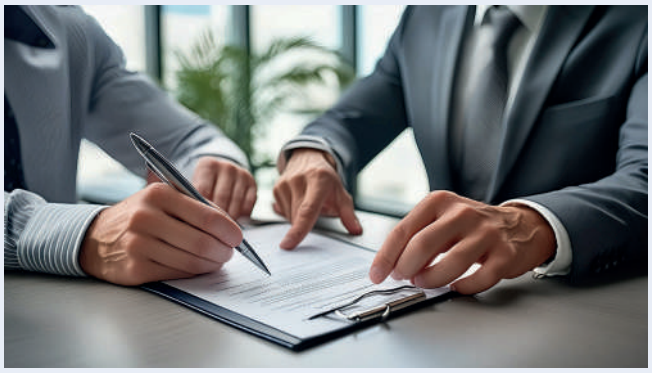
"Building a Champion's Mindset: Lessons From the Court"

In his keynote speech, Toni Nadal will talk about dealing with adversity, about attitude, simplicity, self-demand, respect, commitment, self-improvement, coping with failure, and not glorifying success. Drawing on lessons learned over the course of a long and illustrious career guiding one of the greatest tennis players of all time, he will explain why the most important talent is the capacity to improve and accept good guidance.

Contracts and Consequences

Chaired by:
GILES HACKING

Chair of the INC Business Integrity Committee



This session will begin with an overview of key contractual topics by Mr. Giles Hacking, Chair of the INC Business Integrity Committee. A number of contract-related questions of importance for the nut and dried fruit industry will be explored, starting with the most fundamental question of all: What is a contract? From there, a partner at the law firm Clyde & Co will discuss the obligations derived from a contract, particularly with regard to payment of the agreed price and shipment of the goods. INC-recognized arbitration organizations will also be participating to give an overview of their organizations' expertise, key contract terms, and their practical applications. The session will conclude with an interactive Q&A.

Nutrition Research Seminar

Chaired by:
PROF. JORDI SALAS-SALVADÓ

Distinguished Professor of Nutrition and ICREA Acadèmia Researcher, Chairman of the INC World Forum for Nutrition Research and Dissemination Rovira i Virgili University, IISPV, CIBERobn, Spain

"Nut and Dried Fruit Consumption and Health: Studies That Will Shape the Knowledge"

As chair of the Nutrition Research Seminar, Prof. Salas will present the most important studies published during 2024 on the importance of nut and dried fruit consumption for health. He will also discuss large studies that are currently underway and are poised to shape medicine in the future. Finally, he will announce the objectives, participants, and scientific content of the NUTS 2025 international conference, which will be held at the INC headquarters in October. This gathering will bring together some of the world's top health researchers to review the scientific evidence on the health benefits of nuts and dried fruits, identify research priorities, and publish key findings in a scientific journal.

INC Awards

The INC Awards, the premier international showcase of excellence in the nut and dried fruit industry, will be presented in Palma to recognize individuals and companies for achievements in several categories. We are pleased to announce the following winners:

Corporate Golden Nut Award

MERCADONA
Valencia, Spain

This year, the Corporate Golden Nut Award, the nut and dried fruit's industry's highest honor, will be presented to **Mercadona**, Spain's leading supermarket chain. Founded in 1977, Mercadona has grown into a retail giant with more than 1,700 stores across Spain and Portugal, serving millions of customers daily. The company operates under a unique Total Quality Model, developed in 1993, which aims to satisfy five key components: "The Boss" (the customer), the Employee, the Supplier, Society, and Capital. This model places "The Boss" at the center of all decisions, ensuring customer satisfaction is paramount. Mercadona also invests heavily in its employees, offering stability, training, and internal promotion opportunities. The company works closely with its suppliers to provide an efficient selection of products tailored to the needs of its customers, while also contributing to society's sustainable development. With 110,000 employees and €38.8 billion in sales in 2024, Mercadona plays a key role in Spain's retail landscape.

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Award for Excellence in Gastronomy

DISFRUTAR
Barcelona, Spain

From left to right: Oriol Castro, Eduard Xatruch, and Mateu Casañas. Photo ©Joan Valera.

The Award for Excellence in Gastronomy honors those who have made significant contributions to the culinary world, showcasing the versatility of nuts and dried fruits. This year, the award goes to the restaurant **Disfrutar**. Oriol Castro, Eduard Xatruch, and Mateu Casañas embarked on their culinary journey together in 2012 with the opening of Compartir Cadaqués. Though they officially teamed up then, their collaboration began much earlier, having met in the late 1990s at elBulli, where they honed their craft. In 2014, they expanded their vision to Barcelona with the opening of Disfrutar, which has since earned **three Michelin stars** and was named the **Best Restaurant in the World** by The World's 50 Best Restaurants in 2024. Their creativity doesn't stop there. In 2022, they launched Compartir Barcelona, and they continue to consult for culinary ventures around the world. Renowned for their boundless innovation, their work is driven by an unrelenting pursuit of new techniques and concepts that challenge the status quo of modern gastronomy.

Award for Excellence in Research

DR. DAVID BAER
Research Leader
U.S. Department of Agriculture, Agricultural Research Service, USA

The Award for Excellence in Research recognizes exceptional researchers whose work has made significant contributions to advancing health and nutrition related to nuts and dried fruits. This year, the award will go to **David J. Baer**, Ph.D., a Supervisory Research Physiologist with the U.S. Department of Agriculture's Beltsville Human Nutrition Research Center located in Beltsville, Maryland, USA. He serves as the Research Leader for the Center's Food Components and Health Laboratory. Dr. Baer conducts controlled dietary intervention studies to investigate the relationship between diet and the risk for chronic degenerative diseases, especially cardiovascular disease, cancer, and diabetes in people. He has investigated the role of dietary patterns, individual foods, food components, and food processing including different types of protein, fats and fatty acids, fiber, margarine, butter, plant sterols, salad dressings, meat, whole grains, pulses, berries, alcohol, tea, and of course nuts. In addition to dietary intervention studies, Dr. Baer is involved in research studies to validate food survey methodologies and to develop new methods for dietary assessment.

Sustainability and Innovation Awards

In addition, the recipients of the prestigious **AWARD FOR EXCELLENCE IN SUSTAINABILITY** and **INNOVATION AWARD** will be unveiled at the INC Congress in Palma de Mallorca. Through two distinct categories —*Back to the Planet and Back to the People*— the Award for Excellence in Sustainability recognizes groundbreaking initiatives that drive meaningful progress in environmental and social responsibility within the nut and dried fruit sector. Meanwhile, the Innovation Award highlights cutting-edge products/services that are shaping the future of the industry.

These highly anticipated honors celebrate outstanding achievements, providing a global platform for honorees to elevate their reputation, showcase their work, and connect with an influential audience of 1,500+ industry leaders from over 60 countries. The winners will be revealed live at the congress —honoring vision, dedication, and the drive to move the industry forward.

Evening Social Events

The INC Congress social events offer the perfect blend of networking and relaxation, bringing together key players from the global nut and dried fruit industry in an inviting, convivial atmosphere. These exclusive gatherings provide a chance to connect, unwind, and build lasting relationships beyond the conference sessions.

WELCOME COCKTAIL

May 8, 2025
Parc de la Mar

The social program begins with an unforgettable welcome cocktail at Parc de la Mar, nestled between downtown Palma and the sparkling sea. Savor a selection of beer, wine, hors d'oeuvres, and gourmet offerings from food stations. Given the venue's prime location, we recommend visiting Palma's iconic cathedral beforehand. The tickets for the cathedral can be purchased online, with the last entry at 5:00 pm and closing time at 5:45 pm.

Sponsored by Importaco

CASUAL BUFFET DINNER

May 9, 2025
Port Adriano Marina

Enjoy a fun evening in the heart of Port Adriano, one of Mallorca's most exclusive marinas. Overlooking the sleek yachts and sparkling waters, immerse yourself in the lively atmosphere with a delicious buffet of authentic Spanish cuisine. As you savor local flavors, let the rhythm of live rumba music set the perfect tone for a night of great food, conversation, and unforgettable moments by the sea.

Sponsored by Wonderful Pistachios & Almonds

COCKTAIL, GALA DINNER & BALL

May 10, 2025
Palma Convention Center

This elegant evening, with exquisite dining, fine wine, and lively music, is the most glamorous social event of the INC Congress. The night begins with cocktails and conversation, followed by a formal dinner in the stunning Palma Convention Center. As tradition holds, delegates will bid farewell to the congress with an unforgettable celebration filled with music, dancing, and camaraderie.

Sponsored by Chilenut

Activities and Tours

Make the most of your time in Mallorca with a selection of unforgettable activities and tours on the fringes of the congress. Whether you prefer an active start with golf or tennis, a deep dive into local culture and cuisine, or a scenic adventure across the island, there's something for everyone. Visit the congress website to sign up now!

GOLF & TENNIS DAY **May 7, 2025**

Warm up for the INC Congress with your choice of golf or tennis at two premier venues. Golfers will tee off at 7:00 am at Son Gual, a private club in Mallorca's picturesque countryside, featuring an 18-hole championship course with challenging bunkers and water hazards. After a post-game group lunch, return buses will depart for Palma at 2:00 pm. Meanwhile, tennis enthusiasts will visit the Rafa Nadal Academy by Movistar in Manacor for a guided tour, a museum visit, and a professional tennis clinic with friendly matches. Non-players can enjoy the Academy's facilities, including the museum, gym, spa, and pool. After an on-site lunch, buses will depart at 2:00 pm.

Photo: Son Gual Golf.

Photo: Rafa Nadal Academy by Movistar.

TOURS FOR ACCOMPANYING PERSONS

PALMA FOODIE & CULTURAL TOUR
May 8, 2025

Explore Palma's old town while savoring local flavors. The tour includes a visit to the stunning 13th-century Gothic cathedral, followed by a stop at the lively farmers' market. After observing the skillful slicing of *serrano* ham and savoring it alongside cheese and Spanish wine, the group will stroll through charming streets and patios. A tapas lunch will feature traditional dishes like *llonguet* and croquettes, followed by a sweet treat—perhaps hot chocolate, artisanal ice cream, or a Mallorcan *ensaimada*.

MALLORCAN WONDERS TOUR
May 9, 2025

Discover the beauty of Mallorca on this scenic tour. Travel from Palma to Porto Cristo to explore the breathtaking Drach Caves, home to Europe's largest underground lake, where a mesmerizing light show and live music will create an unforgettable experience. Next, stop by one of the renowned Mallorcan pearl factories to discover the island's rich tradition of craftsmanship and its role in the local economy. The tour concludes with a leisurely lunch in Mallorca's picturesque wine region, surrounded by stunning landscapes.

INC On-site Technical Visit 2025

Mallorca
42ND INC WORLD NUT AND DRIED FRUIT CONGRESS

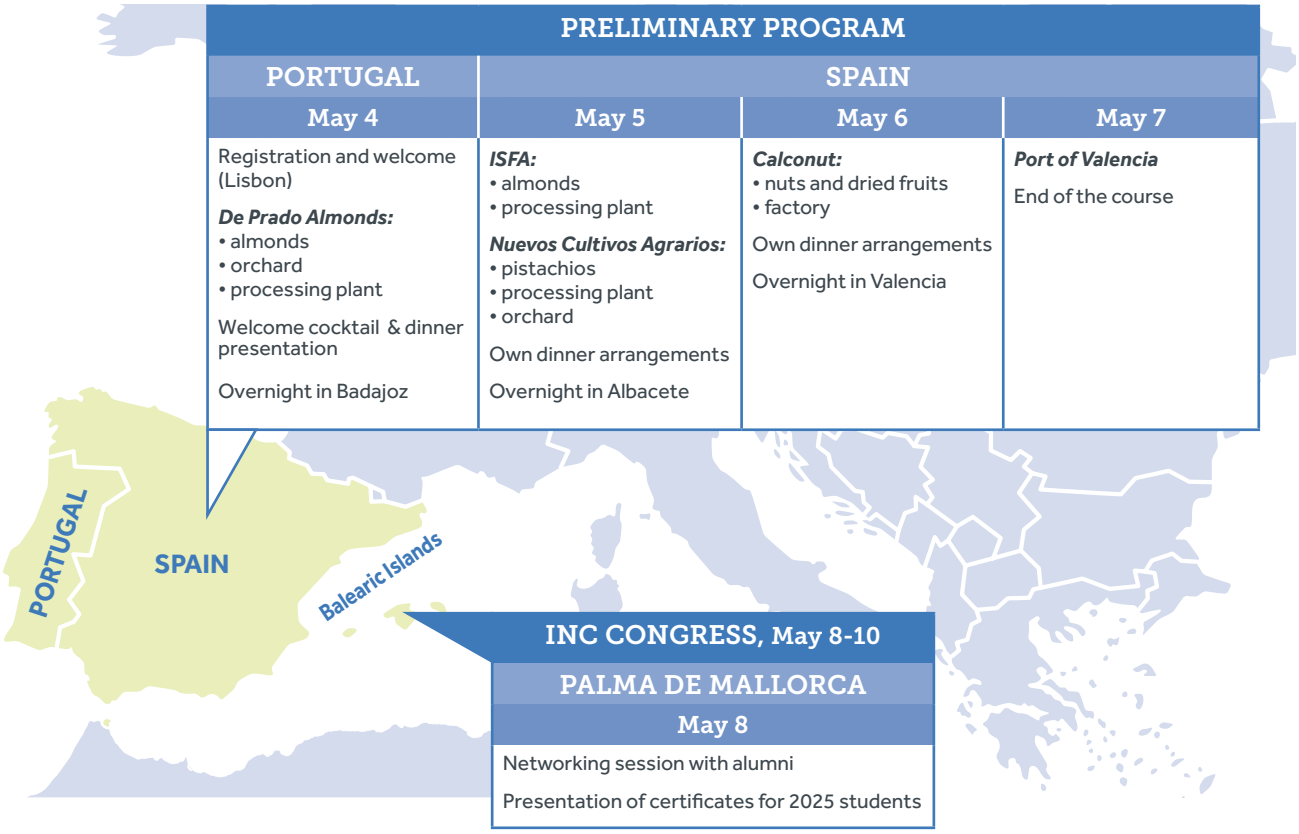
Immerse yourself in a unique learning experience just before the INC Congress in Mallorca by joining the industry's leading technical visit across southern Portugal and Spain.

This year's INC On-Site Technical Visit offers an exclusive look at top industry players through tours of orchards, processing plants, and factories, providing valuable insights from local experts. Confirmed stops include De Prado Almonds, Iberian Smart Financial Agro (ISFA), Nuevos Cultivos Agrarios, Calconut, and the Port of Valencia. Running from May 4-7, 2025, this four-day journey across the Iberian Peninsula wraps up just in time to head to Mallorca for the INC Congress.

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

PRELIMINARY PROGRAM

PORTUGAL	SPAIN		
May 4	**May 5**	**May 6**	**May 7**
Registration and welcome (Lisbon) ***De Prado Almonds:*** • almonds • orchard • processing plant Welcome cocktail & dinner presentation Overnight in Badajoz	***ISFA:*** • almonds • processing plant ***Nuevos Cultivos Agrarios:*** • pistachios • processing plant • orchard Own dinner arrangements Overnight in Albacete	***Calconut:*** • nuts and dried fruits • factory Own dinner arrangements Overnight in Valencia	***Port of Valencia*** End of the course



INC CONGRESS, May 8-10

PALMA DE MALLORCA
May 8
Networking session with alumni
Presentation of certificates for 2025 students

Photos: De Prado Almonds, Nuevos Cultivos Agrarios, Port of Valencia, ISFA, Calconut.

Sponsors and Exhibitors

Mallorca
42ND INC WORLD NUT AND DRIED FRUIT CONGRESS

Thank you to all our sponsors and exhibitors for supporting the INC Congress in Palma de Mallorca. We appreciate your commitment and partnership in making this event a success. Looking forward to an exciting and fruitful INC Congress together!

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

INC Pavilion Shines at Gulfood 2025, Marking Another Successful Edition

With 26 co-exhibitors, the INC Pavilion in Dubai became a key gathering place for leaders in the nut and dried fruit industry at one of the world's largest food and beverage trade fairs.

This year's Gulfood once again proved to be a monumental success for the nut and dried fruit sector. The INC Pavilion, spanning an impressive 228 m² in Za'abeel Hall 5, hosted 26 co-exhibitors from 10 different countries, providing an unparalleled platform to showcase industry innovation and global participation.

Gulfood, now in its 30th edition, continued to solidify its reputation as one of the world's premier food and hospitality events. The 2025 edition brought together over 5,500 exhibitors from 129 countries and attracted more than 100,000 visitors. This year's event spotlighted key trends that directly impact the nut and dried fruit industry, including sustainability, environmental responsibility, technological advancements (particularly AI-driven precision agriculture tools), and plant-based and alternative proteins.

At the heart of this dynamic environment, the INC Pavilion served as a key hub for industry professionals, offering exceptional visibility for participating companies. Co-exhibitors took full advantage of the opportunity to display their latest products, forge new connections, and strengthen business relationships in a fast-paced and highly collaborative setting.

One of the event's highlights was the INC Happy Hour, sponsored by Al Jameel International. Held on February 19, this highly anticipated networking event provided a relaxed yet professional atmosphere for key industry players to connect, discuss market trends, and explore potential collaborations.

With another successful edition concluded, the INC remains committed to supporting its members and ensuring continued growth and innovation within the nut and dried fruit industry on the global stage.

INC PAVILION IN NUMBERS	GULFOOD IN NUMBERS
26 companies	100,000+ visitors
10 countries	5,500+ exhibitors
228 m² pavilion space	129 countries

Thank you for joining us at Gulfood!


Aakash Industries
RICHNESS IN EVERY GRAIN
INC
International Nut&DriedFruit
PATAG


الجميل العالمية
AL JAMEEL INTERNATIONAL


INC
Happy Hour
Sponsored by:
الجميل العالمية


INC
International Nut&DriedFruit
INDIA


OASIS RICE OASIS


INC


TRIMAX


INC
Happy Hour


OASIS RICE


Agri Merchants


Anahita
Quality is Always Our Best Product


aprin


Aydın
Aydın


WONDER HOLDING GROUP


Bizim Anadolu Tarım


ÇAKRAN
WALNUTS
CORALINO S.A.
Dornika
Reell Food
HASAS
IRAN PISTACHIO ASSOCIATION
Alpaca
MEDA
Your partner
MEPE
LOBAS
NUTAGRA
PACIFIC
Nuts & Dried Fruits
PASHA INC
Santis fruit
SEASTAR
SOULFUL
TREENUTS
produce
sunshine
Terraida
Excellence at the origin
Valbifrut

INC Multi-Country Dissemination Plan: Cracking the Code to Gen Z

Our multi-country campaign is unlocking the secret to making nuts and dried fruits the ultimate healthy lifestyle choice for Gen Z, the snacking generation. Originally launched in China in 2022 and later expanding to India and Latin America, the campaign has gained an impressive total reach of over 467 million people and more than 10.4 million social media engagements, successfully connecting with the Gen Z audience —the next generation of consumers.

Nut Tunes: The Soundtrack to Snacking in Latin America

When it comes to making a lasting impression, nothing resonates quite like music. Enter "Nut Tunes: Feed Your Vibe!" —the Latin American arm of the campaign that brilliantly fuses rhythm and nutrition. Through a collection of 16 custom-created tunes celebrating different nuts and dried fruits, the campaign found a new way to engage young audiences.

Our strategy also included vibrant recipe videos, which reimagined classic dishes from Brazil, Argentina, Chile, and Mexico by incorporating nuts and dried fruits to promote daily consumption. With content full of humor, fun, and relatable storytelling, we reached audiences across TikTok, Instagram, and Facebook. But the real game-changer was the inclusion of our custom music tracks on Spotify. This move offered Gen Z a new way to discover the benefits of nuts and dried fruits, creating an unforgettable experience through music. Through the Nut Tunes characters, we also highlighted the health benefits of our wholesome snacks, creating an unforgettable and engaging experience.

The result? A massive reach of 119.6 million, with 1.7 million interactions. TikTok led the way, adding 111,000 new followers, while Instagram and Facebook kept the momentum going with engaging content.

China's "Own Your Now" Campaign: Embracing the Moment

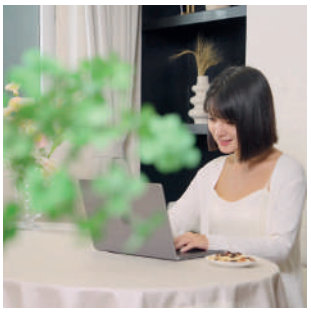
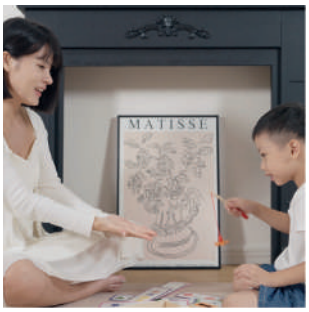
Over in China, the campaign took on a different but equally compelling form. "Own Your Now" encouraged young people to embrace their lifestyles while incorporating nuts and dried fruits into their daily routines. The approach was dynamic and visual, featuring four stunning hero videos that resonated particularly well on Douyin (China's TikTok equivalent).

Beyond the hero videos, the campaign tapped into China's popular City Walk trend, showcasing various cities across the country and encouraging readers to explore urban spaces while fueling their journey with nourishing snack stops featuring nuts and dried fruits to keep their energy up.

The campaign also focused on simple, healthy recipes with step-by-step guides to help young readers prepare nutritious meals. Additionally, we shared informative insights on the nutritional value and health benefits of various nuts and dried fruits, providing clear, accessible information to help audiences understand the unique advantages of these wholesome snacks.

As a result, the campaign in 2024 achieved a remarkable total reach of 86.8 million and garnered 917K engagements, highlighting its impact and success in connecting with young consumers.



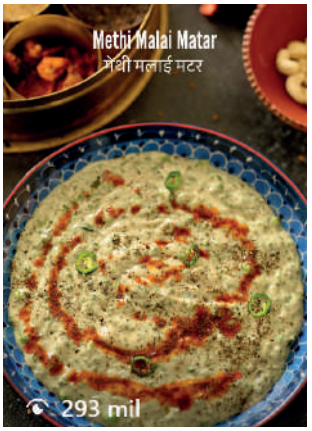




India's "It's Time to Make a Switch": A Call to Action

This year, our hero content has centered around "It's Time to Make a Switch," a series of motivational video capsules aimed at inspiring young people to embrace positive change and make a switch to healthier lifestyles. The other piece of hero content belonged to the India-focused Nut Tunes piece, "K-Shew," which aligned with the campaign in Latin America. Both initiatives were strategically crafted to connect with our target audience, sparking meaningful engagements.

To bring the campaign even closer to Indian culture, our content incorporated "Dayketings," a strategy that aligns marketing efforts with significant cultural milestones, such as festivals and events. This approach resonated deeply with the local audience, gaining nearly 600K interactions. The strategy also shared short, vibrant videos showcasing simple and healthy recipes with nuts and dried fruits. Infused with the rich flavors of Indian cuisine, they encouraged young people to integrate nuts and dried fruits into their everyday lives.

Additionally, video and image posts conveyed valuable nutrition knowledge in a dynamic and engaging way, debunking myths surrounding nut and dried fruit consumption and highlighting their nutritional benefits. Through this highly engaging content, the campaign reached nearly 72 million Gen Zs and garnered 1.3 million interactions in 2024.



The Power of Influence: The Role of Digital Storytellers

A major driving force behind the multi-country campaign's success has also been its strategic use of influencers. Across all three markets, digital storytellers aged 20-34 played a crucial role in connecting the multi-country campaign with highly engaged communities. Their authentic, relatable content, whether it was showcasing easy snack ideas or fitness inspiration, brought us even closer to Gen Z!

In our next issue, we'll unveil our exciting new campaigns for 2025 —watch this space!

Spreading the Goodness of Nuts and Dried Fruits: A Year of Engaging Content and Healthy Snacking

Expanding beyond the multi-country dissemination plan, as part of our mission to promote nuts and dried fruits worldwide, the INC also inspires healthy eating habits through our annual digital communications strategy.

Rolled out on social media channels like TikTok, Instagram, Facebook, and Pinterest, in 2024 alone, we were able to reach over 14 million people worldwide with our campaigns, further cementing our commitment to bringing the benefits of nuts and dried fruits into everyday lives. Our strategy revolves around four key content pillars: Nutfruit Recipes, Nutfruit Beverages, Nutfruit ID Cards, and Snack Boxes. Each of these initiatives is carefully crafted to inspire healthy snacking while educating people about the countless benefits of nuts and dried fruits.

Nutfruit Recipes: Delicious and Versatile

Since 2017, the INC has developed delicious recipes that incorporate nuts and dried fruits. These recipes have shown just how versatile these nutrient-packed ingredients can be, making it easier for people to add them to their daily meals. With over 160 recipes created so far, we've garnered an impressive 44 million views across social media platforms like Instagram, TikTok, YouTube, and Facebook.

In 2024, we stepped up our game even further and produced 40 engaging video recipes. These videos included both globally popular dishes and targeted recipes for Latin American audiences, translated into Spanish and Portuguese. Focusing on Gen Z and Millennials —busy, on-the-go individuals— our latest collection of recipes offers quick and easy meal ideas. Whether for work, studying, or just everyday life, these plant-based, wholesome recipes ensure that people can enjoy flavor-packed and nutritious meals with nuts and dried fruits without sacrificing convenience.

Nutfruit Beverages: Refreshing, Nutritious Smoothies

Another exciting initiative was our Nutfruit Beverages campaign, which took a creative spin on showcasing smoothies made with nuts and dried fruits. Through vibrant, illustrated images, we demonstrated how simple and wholesome ingredients can come together to create nutritious, quick, and refreshing beverages. These smoothies are packed with the goodness of nature, offering a delicious way to enjoy the benefits of nuts and dried fruits in liquid form.

The success of this campaign speaks for itself, gaining over 52K interactions. After Nutfruit Recipes, it was one of the standout campaigns of 2024, underscoring how easy it is to enjoy the health benefits of nuts and dried fruits.

Nutfruit ID Cards: Fun and Informative

In our effort to educate people about the diverse world of nuts and dried fruits, we introduced Nutfruit ID Cards —a fun, engaging way to showcase the nutritional benefits of different products as well as their origins.

The concept is simple: imagine a fictional "Nutfruit University" where each nut or dried fruit has its own identity. Each Nutfruit ID Card features a creative "photo" of the product along with a description of its unique qualities. The back of the card shows nutritional information in a visually appealing and easy-to-understand format, complete with graphics and infographics that make the facts memorable. These posts have captured the attention of our audience, offering both entertainment and valuable education about the different nuts and dried fruits available for a healthy lifestyle.

Snack Boxes: Curated for Every Lifestyle

Our Snack Box campaign is designed to connect with diverse lifestyles by offering curated collections of nuts that align with specific health goals. We launched a series of eight engaging Instagram carousel posts, each dedicated to a different Snack Box. These boxes are thoughtfully assembled to not only deliver great taste but also emphasize the health benefits of the various nuts inside. Whether someone is looking for an energy boost, better digestion, or a satisfying snack to complement their busy day, our Snack Boxes offer something for everyone.

Through these engaging campaigns, we aim to inspire healthy, mindful snacking while showcasing the versatility of these powerhouse ingredients. With the support of our members, we will keep spreading the message of good health through the goodness of nuts and dried fruits, one delicious recipe and fun campaign at a time.

INC Executive Committee Meets to Discuss New Initiatives

On February 16, the INC Executive Committee convened to review the ongoing activities within the INC, strategize future projects, and ensure the organization's continued growth. The meeting focused on key initiatives for 2025 and beyond.

A key topic on the agenda were the initiatives envisaged under the new INC Sustainability Institute. A motion to approve the initiatives was passed, paving the way for this exciting new project, which is set to be unveiled at the INC Congress in Mallorca this May.

Other focus areas were the continuation of the Country Outreach Program and the Multi-Country Dissemination Plan. After successful visits to Rome, Chile, and Brazil in 2024, it was approved that this year the Country Outreach Program will continue to make strides in China and Latin America. Regarding the Multi-Country Dissemination Plan, after three successful years since its launch in China, followed by expansions into India and Latin America, the group endorsed the continuation of the project, with exciting new campaigns to be launched in the second quarter of 2025.

Preparations for the upcoming INC Congress in Mallorca were presented, including round table panelists, keynote speakers, and the highly anticipated evening social events.

The group also assessed the foundation's financial status and provided updates on various ongoing initiatives within the INC, including the progress of the NUTPOOL project and preparations for the NUTS 2025 gathering in October. Updates were shared on the INC Academia, statistics, and the annual marketing and communication strategy.

The next INC Executive Committee meeting will take place in May 2025 in Mallorca.

INC Publishes 2024 Statistical Yearbook

Published in late 2024, the 15th edition of the INC's *Nuts & Dried Fruits Statistical* Yearbook analyzes the key production, trade, and consumption trends of the past decade. As the industry's definitive resource, this publication offers valuable insights that help businesses stay informed.

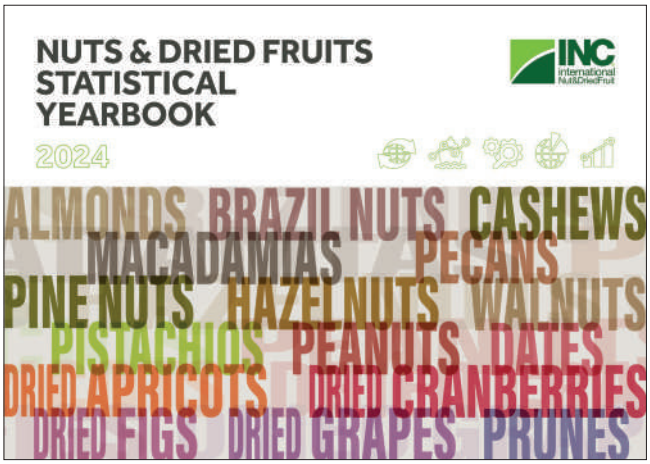
Global tree nut production has nearly doubled over the past decade, from 3.6 million metric tons in 2014/15 to nearly 6 million metric tons in 2024/25 (kernel basis, except pistachios in-shell. World peanut production amounted to 48 M MT (in-shell basis) in 2023/24 and was projected to reach 51 M MT in 2024/25. Meanwhile, total dried fruit production amounted to 3.36 M MT in 2023/24 and was estimated to remain at the same level for 2024/25.

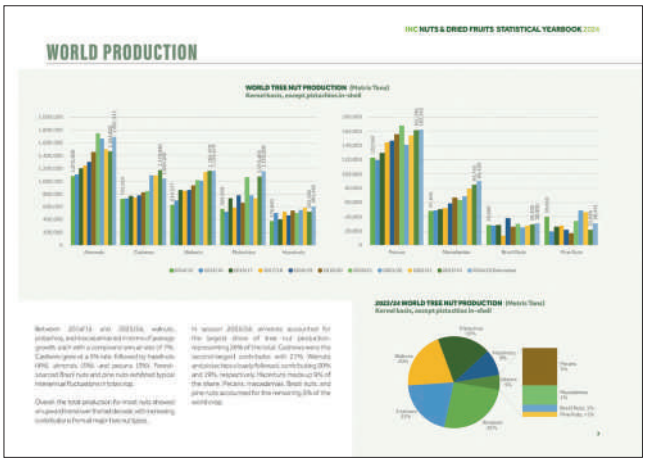
The USA led tree nut production in 2023/24 with a 39% share, followed by China (12%) and Türkiye (10%). China (38%) and India (13%) dominated peanut production, while the USA (12%) and Türkiye (11%) led dried fruit production.

On the trade front, the USA dominated exports, with almonds leading the way and walnuts and pistachios as significant contributors. India and Argentina led in peanuts. Europe and Asia were key import markets for nuts. Türkiye remained a key exporter of dried grapes, apricots, and figs, while the USA leads in cranberries and prunes, with Europe as the top import market.

Almonds led tree nut consumption in 2023, accounting for 27% of the world total, followed by cashews (21%) and walnuts (20%). Dried grapes and dates dominated dried fruit consumption, each accounting for 38% of the total.

Access to the Statistical Yearbook is a key benefit of INC membership. Members can access the full document in the members' area of the INC website: https://inc.nutfruit.org/members-area/statistics/





Explore the 2024 INC Annual Report

The 2024 INC Annual Report offers a detailed look at the INC's achievements, initiatives, and an overall update of the sustainable growth of the nut and dried fruit industry. This year's report is not just a recap of events, but a comprehensive guide to understanding the significant strides we've made, how the INC continues to drive progress, and also shares an overview of the exclusive resources available to our members.

Starting with "Who We Are," the report highlights the INC's mission, structure, and leadership. This section showcases our dedication to fostering a sustainable and growing global industry, emphasizing our core values. As a member, you'll also rediscover the various benefits of being part of a global network that is shaping the future of the nut and dried fruit sector.

In "What We Do," the report dives into the INC's key activities, including our flagship event, the World Nut and Dried Fruit Congress. The report also highlights our active participation in leading trade fairs with the INC Pavilion and other global events, as well as our outreach efforts to engage stakeholders through country specific activity and meetings. Our commitment to sustainability is also a focal point, while also highlighting our progress toward securing a health claim through the ongoing NUTPOOL Project. Following these efforts, the INC has played a key role in promoting the health benefits of nuts and dried fruits globally through our multi-country campaigns and annual communications plan.

In addition to this, "Member Resources" shines a spotlight on the valuable tools available to INC members. From *Nutfruit* magazine to our Statistical Yearbook, industry databases, and scientific updates, these resources are designed to keep our members informed, connected, and at the forefront of industry trends.

The 2024 Annual Report highlights how the INC shaped the agenda for the nut and dried fruit industry. Visit the INC website to access the full report and explore the year's most impactful initiatives in detail.

INC ACADEMIA
EXECUTIVE EDUCATION
FOR THE NUT & DRIED FRUIT INDUSTRY

Master the World of Nuts & Dried Fruits

Unlock Your Career Potential with the INC Academia!

Why join us?

- Over 300 industry leaders have trusted us
- Programs developed by leading institutions and industry experts
- Two program options tailored to your professional experience

Basic Program on Nuts & Dried Fruits

Advanced Program on Nut & Dried Fruits

- Official INC certification upon completion, recognized by industry leaders.
- Boost your career and bring valuable expertise to your company.

Enroll now and start your journey to success

academia.nutfruit.org

Led by respected industry and academic experts, **over 300 students from leading companies** have already benefited from our extensive program. The INC Academia offers an array of invaluable insights that will help students advance their careers and bring valuable expertise to companies.

EST. 1985

La Nogalera

— GOOD ROOTS, AMAZING NUTS —

Pecans

Nut-thing but the Best

www.lanogalera.com @lanogaleragroup

We shell well over **100 million** pounds a year

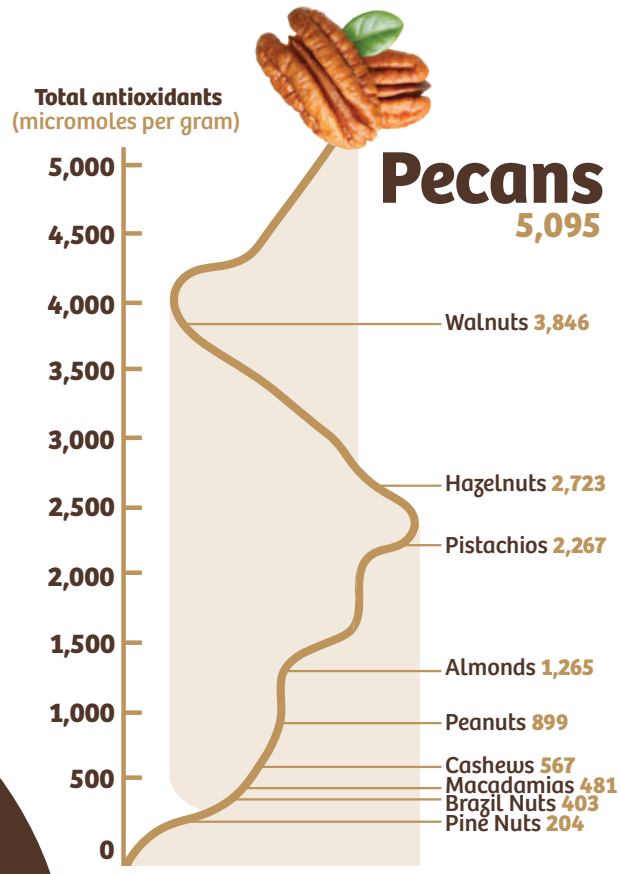
- **Oil roast & Dry roast capabilities**
- **Confectionary capabilities**

Our certifications

USDA ORGANIC · JAS Kiwa BCS Öko-Garantie · DUN & BRADSTREET ESG REGISTERED · NON GMO Project VERIFIED · Great Place To Work. · SQF · CCIM HALAL CONSULTANTS · Sedex

#1 Super Nut

Pecans contain more antioxidants than any other nut!



Contact us

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Global Statistical Review

Crop Progress Report

March 2025

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	Chile
Australia	Morocco
Spain	Italy
Iran	Syria
Türkiye	
Tunisia	
Greece	

Brazil Nuts

Bolivia	
Peru	
Brazil	

Cashews

India	Nigeria
Côte d'Ivoire	Indonesia
Viet Nam	Cambodia
Guinea-Bissau	
Brazil	
Tanzania	
Benin	

Hazelnuts

Türkiye	China
Italy	Iran
USA	Chile
Georgia	
Azerbaijan	
Spain	
France	

Macadamias

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

Pecans

USA	
Mexico	
South Africa	
Australia	
Brazil	
China	

Pine Nuts

China	Türkiye
North Korea	Portugal
Pakistan	Italy
Afghanistan	
Mongolia	
Russia	
Spain	

Pistachios

USA	Italy
Iran	Australia
Türkiye	Spain
Syria	
Afghanistan	
China	
Greece	

Walnuts

China	India
USA	Romania
Iran	Argentina
Türkiye	Hungary
Ukraine	Italy
Chile	Georgia
France	Australia
Moldova	

Peanuts

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

Dates

Saudi Arabia	Sudan
Egypt	Oman
Iran	Tunisia
UAE	Morocco
Pakistan	Libya
Algeria	Israel
Iraq	USA

Dried Apricots

Türkiye	
Iran	
China	
USA	
South Africa	
Australia	

Dried Cranberries

USA	
Canada	
Chile	

Dried Figs

Türkiye	
Egypt	
Iran	
USA	
Greece	
Spain	
Italy	

Prunes

USA	South Africa
Chile	
France	
Argentina	
Serbia	
Australia	
Italy	

Raisins Sultanas Currants

USA	Greece
Türkiye	Australia
Iran	Argentina
China	South Africa
India	
Chile	
Uzbekistan	

Listed by global production as per FAO but not necessarily meaning quantities going through commercial channels.

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 mid-January and February 2025.

USA. The January 2025 Almond Board of California Position Report was published on February 12, 2025, and shows receipts of 2.664 billion lbs. (approx. 1.2 million metric tons) crop year-to-date. The 2024/25 crop receipts are 11.4% larger than the 2023/24 crop through six months. USDA inspections show an average inedible reject percentage of 3.07%, which is about 1% lower than last year, signifying improved crop quality.

Total shipments August 2024 through January 2025 were only slightly lower than those observed for the same period in 2023/24, declining by just 0.53%. The increase in crop size has largely been offset by a reduction in the carry-in inventory as evidenced by a total supply as of January 2025 that is down 0.96% from a year ago. Domestic shipments August through January were down slightly (-1%) vs. CY 2023/24 at 358 M lbs. (approx. 162,200 MT). Export shipments were down 3.6 M lbs. (-0.35%) at 1.016 M lbs. (approx. 461,000 MT). While shipments to the Asia/Pacific region were down 12%, exports to the Middle East/Africa were up 19%. Through six months, exports to Europe have nearly matched their total from last crop year at 319.5 M lbs. (approx. 145,000 MT).

Australia. The Almond Board of Australia's crop forecast for the 2025/26 crop is 155,531 MT. This figure is 5.5% down on the 2024/25 pre-season estimate but still the second largest on record and just above the actual intake of 2024/25.

As the 2024/25 selling season (March 1-February 28) came to a close for Australian marketers, the ABA's shipping numbers indicated that it was highly likely that the industry would sell in excess of what was produced for the season for the second successive year. Sales volumes year-to-date through December 2024 (143,921 MT kernel weight equivalent) had already surpassed the end of season record volume posted last year (131,021 MT).

Export demand has driven growth with advantageous trade agreements in China and India leading to a clear pricing preference for Australian in-shell, especially. There has also been considerable effort to build demand in Southeast Asia while sales of lower grade material into Türkiye, Spain and USA were significantly down this season due to a dry harvest and the higher quality out-turns that ensued.

Updated long-term projections indicate that, under reasonable growing conditions, production could peak by 2027/28, reaching a projected 176,700 MT. With significant orchard holdings requiring replanting over the next 5-6 years, a slight production decline is anticipated in the early 2030s, although anticipated to remain above 170,000 MT. These estimates assume 2,000 hectares of replanting annually through 2030.

Spain. Despite lower-than-expected yields per hectare, and falling short of the initial forecast, the 2024/25 crop marks an improvement compared to the previous season.

According to data from the Spanish Ministry of Economy, Trade and Enterprise and AEOFRUSE (Spanish Nut Growers Association), exports year-to-date (August-November 2024, data including re-exports) of manufactured almonds reached 12,006 MT, reflecting a 4.31% decrease compared to the same period in 2023. Kernel shipments, on the other hand, showed significant growth, reaching 51,443 MT, up by 32.87% vs. the previous season. Total exports, combining manufactured and kernel volumes, stood at 63,449 MT, representing a 23.77% growth year on year. Western Europe remained the main market, with 51,035 MT, representing an increase of 23% from 2023.

Estimated World Almond Production. Kernel Basis · Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA (MM lbs)	800	2,394	**3,194**	503	503	2,744	**3,247**	550
USA (MT)	363,200	1,086,880	**1,450,080**	228,360	228,360	1,245,780	**1,474,140**	249,700
AUSTRALIA	30,000	110,707	**140,707**	10,000	10,000	153,550	**163,550**	15,000
SPAIN	15,337	113,150	**128,487**	21,914	21,914	122,300	**144,214**	28,863
TÜRKIYE	0	25,000	**25,000**	0	0	30,000	**30,000**	0
PORTUGAL	0	20,850	**20,850**	0	0	25,000	**25,000**	0
ITALY	0	21,800	**21,800**	1,000	1,000	21,000	**22,000**	1,000
MOROCCO	3,000	18,500	**21,500**	2,500	2,500	18,000	**20,500**	2,500
CHINA	0	15,000	**15,000**	0	0	16,780	**16,780**	0
TUNISIA	1,500	12,000	**13,500**	1,000	1,000	12,000	**13,000**	1,000
CHILE	0	12,436	**12,436**	0	0	9,583	**9,583**	0
GREECE	0	6,500	**6,500**	700	700	6,000	**6,700**	1,500
IRAN	1,000	6,000	**7,000**	2,000	2,000	6,000	**8,000**	2,000
OTHERS	0	16,000	**16,000**	0	0	16,200	**16,200**	0
WORLD TOTAL	**414,037**	**1,464,823**	**1,878,860**	**267,474**	**267,474**	**1,682,193**	**1,949,667**	**301,563**
WORLD CONSUMPTION (Supply-End. Stock)				**1,611,386**				

Sources: Almond Board of California, Almond Board of Australia, AEOFRUSE, Aegean Exporters' Association, Portugal Nuts, Italian National Institute of Statistics, Chilean Almond Board, Greek Nuts & Fruits Trade Association and other INC sources. Season 2023/2024 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

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 mid-January and February 2025.

The 2025/26 crop (harvesting season December 2024 – March 2025) followed closely behind the high ending prices of the 2024/25 crop. The general market expectation was that while early January shipments would be at higher prices, prices would likely decline as the flow of raw material from the new crop increased towards February and March. Based on this outlook, very few sales were concluded in December for February and March shipments.

However, the situation has since shifted. Since early January, shippers have been focused on securing raw material to fulfill their sales. Reports indicate that raw material availability is extremely low, causing prices to surge by 50%. As a result, shippers have completely withdrawn from the market throughout January and into February.

The slow flow of material is being interpreted as a possible indication of a smaller crop. Reports from collection areas suggest that some parts of the jungle are yielding less than they did last year, raising concerns about overall production. Additionally, some believe that forest fires last September may have exacerbated drought conditions, further impacting the crop size. Factories that have already begun cracking nuts are reporting smaller nut sizes, which can be seen as yet another sign of a reduced crop. Adding to these concerns, some shippers have started drawing comparisons to the record lowest 2017/18 crop, noting similar warning signs. All in all, as of this report, it was still too early to determine with certainty whether any or all of these factors will have a significant impact on the final crop outcome.

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
BOLIVIA	1,500	66,000	**67,500**	2,700	2,700	70,500	**73,200**	3,000
PERU	960	14,400	**15,360**	300	300	14,700	**15,000**	0
BRAZIL	300	7,500	**7,800**	900	900	7,500	**8,400**	300
WORLD TOTAL	**2,760**	**87,900**	**90,660**	**3,900**	**3,900**	**92,700**	**96,600**	**3,300**
WORLD CONSUMPTION (Supply-End. Stock)				**86,760**				

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
BOLIVIA	500	22,000	**22,500**	900	900	23,500	**24,400**	1,000
PERU	320	4,800	**5,120**	100	100	4,900	**5,000**	0
BRAZIL	100	2,500	**2,600**	300	300	2,500	**2,800**	100
WORLD TOTAL	**920**	**29,300**	**30,220**	**1,300**	**1,300**	**30,900**	**32,200**	**1,100**
WORLD CONSUMPTION (Supply-End. Stock)				**28,920**				

Source: INC. Season 2023/2024 refers to the marketing year from March 2023 to February 2024; and 2024/2025 covers March 2024 to February 2025 (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 mid-January and February 2025.

In the northern hemisphere, Cambodia's 2024/25 crop is estimated at 800,000 metric tons (in-shell basis), 27% up from the 2023/24 short crop. With limited local processing capacity (less than 5%), most of the crop was exported to Viet Nam. The Indian crop was shorter in some producing regions, resulting in about 615,000 MT, a 20% decrease from the previous season. Viet Nam's crop is estimated at around 340,000 MT, 13% up from the prior season.

Previous projections of a significant shortfall in West Africa's 2024/25 crops have been revised. The latest data, at the time of reporting, indicates that the decrease is about 11%, compared to the earlier estimation of a 20% deficit. Kernel yields across many West African origins were reported to be lower than average.

Côte d'Ivoire's crop, estimated at 1.2 million MT, represents a 10% decline compared to 2023/24. Of this volume, around 300,000 MT were processed locally, with industry sources projecting that local processing could rise to 500,000 MT by 2025.

In the southern hemisphere, Tanzania recorded a highly favorable season, with a strong crop estimated at 425,000 MT for 2024/25, up by 63% (165,000 MT) as compared to the prior season.

All in all, crop shortages in West Africa and India have been largely offset by a sharp increase in production from Cambodia and Tanzania alongside additional growth in Brazil and Viet Nam. While the global crop outlook for the 2024/25 season is now projected 2% lower compared to the 2023/24, quality is estimated at 3–4% lower than the previous season.

At the time of reporting, no adverse weather patterns were anticipated, supporting a favorable outlook for the 2025 northern hemisphere crops. A clearer and more detailed assessment is expected by the second quarter of 2025.

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

Country	2023/2024				2024/2025*			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CAMBODIA	n/a	630,000	630,000	n/a	n/a	800,000	800,000	n/a
INDIA	n/a	765,000	765,000	n/a	n/a	615,000	615,000	n/a
VIET NAM	n/a	300,000	300,000	n/a	n/a	340,000	340,000	n/a
CÔTE D'IVOIRE	n/a	1,330,000	1,330,000	n/a	n/a	1,200,000	1,200,000	n/a
NIGERIA	n/a	323,000	323,000	n/a	n/a	282,000	282,000	n/a
GHANA	n/a	290,000	290,000	n/a	n/a	275,000	275,000	n/a
BENIN	n/a	280,000	280,000	n/a	n/a	250,000	250,000	n/a
GUINEA-BISSAU	n/a	275,000	275,000	n/a	n/a	240,000	240,000	n/a
GUINEA CONAKRY	n/a	165,000	165,000	n/a	n/a	145,000	145,000	n/a
BURKINA FASO	n/a	165,000	165,000	n/a	n/a	145,000	145,000	n/a
TOGO	n/a	120,000	120,000	n/a	n/a	105,000	105,000	n/a
SENEGAL	n/a	65,000	65,000	n/a	n/a	45,000	45,000	n/a
GAMBIA	n/a	28,000	28,000	n/a	n/a	25,000	25,000	n/a
MALI	n/a	10,000	10,000	n/a	n/a	2,000	2,000	n/a
Subtotal Western Africa	**n/a**	**3,051,000**	**3,051,000**	**n/a**	**n/a**	**2,714,000**	**2,714,000**	**n/a**
Subtotal Northern Hemisphere	**n/a**	**4,746,000**	**4,746,000**	**n/a**	**n/a**	**4,469,000**	**4,469,000**	**n/a**
TANZANIA	n/a	260,000	260,000	n/a	n/a	425,000	425,000	n/a
MOZAMBIQUE	n/a	90,000	90,000	n/a	n/a	90,000	90,000	n/a
KENYA	n/a	5,000	5,000	n/a	n/a	5,000	5,000	n/a
Subtotal Eastern Africa	**n/a**	**355,000**	**355,000**	**n/a**	**n/a**	**520,000**	**520,000**	**n/a**
BRAZIL	n/a	120,000	120,000	n/a	n/a	150,000	150,000	n/a
INDONESIA	n/a	93,000	93,000	n/a	n/a	93,000	93,000	n/a
Subtotal Southern Hemisphere	**n/a**	**568,000**	**568,000**	**n/a**	**n/a**	**763,000**	**763,000**	**n/a**
OTHERS	n/a	56,700	56,700	n/a	n/a	56,600	56,600	n/a
WORLD TOTAL	**n/a**	**5,370,700**	**5,370,700**	**n/a**	**n/a**	**5,288,600**	**5,288,600**	**n/a**
WORLD CONSUMPTION (Supply-End. Stock)				**5.370.700**				

*Harvest from January '24 through June '24 (northern hemisphere) and from Sept '24 through February '25 (southern hemisphere). Source: INC.

Hazelnuts

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

The information contained herein was prepared between mid-January and February 2025.

Türkiye. The Black Sea Exporters Association reported 2024 exports at 323,244 metric tons of kernels (+14% compared to 2023) and US$2.6 billion FOB value (+41%). September–December 2024 exports reached 134,932 MT (+17% year-over-year) and US$1 billion (+36%). Europe remains the top market, with rising shipments to China.

As of this report, the Turkish Grain Board (TMO) held 80,000 MT of 2022/23 crop stock, expected to be set for sale in early 2025, with 2024/25 crop stock estimated at only around 5,000 MT.

The Brown Marmorated Stink Bug (*Halyomorpha halis*) caused peak damage in 2024, averaging 7-10% crop losses and raising processing costs. In response, the Ministry of Agriculture has allocated more resources for integrated pest management and is expected to quadruple efforts for pest control, aiming to release one million samurai wasps (*Trissolcus japonicus*) during the 2025 growing season. Winter spraying and mechanical treatments will continue into spring.

Italy. The market remained very quiet following the holiday season. Stock levels indicate that 60% to 70% of premium-grade products have been sold, leaving limited availability of such grades.

Looking ahead, weather conditions for the new season, up to the time of reporting, have been favorable, with enough chill hours, rainfall, snowpack, and optimal pollination conditions, suggesting positive expectations for the upcoming harvest.

USA. Perfect harvest conditions and excellent quality delivered an unmatched 2024/25 crop. Overall nut size was far improved as compared to 2023, resulting in a more traditional sizing distribution. With minimal kernel defects, shelling activity has increased significantly.

Young plantings entering production continue contributing to incremental volume gains, ensuring manageable growth for the industry. Dry weather and ample pollen load indicate a healthy 2025/26 crop at this early stage.

Chile. Initial counts and field observations indicate a strong harvest for the upcoming season, with critical stages already completed in all production areas. As a result, the 2025 harvest (March–May) is expected to reach approximately 80,000 MT.

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
TÜRKIYE	215,000	650,000	**865,000**	135,000	135,000	785,000	**920,000**	150,000
ITALY	5,000	87,300	**92,300**	2,000	2,000	95,000	**97,000**	5,000
USA	2,500	84,500	**87,000**	1,000	1,000	89,000	**90,000**	1,000
CHILE	5,000	65,300	**70,300**	2,600	2,600	60,800	**63,400**	2,500
AZERBAIJAN	2,000	65,000	**67,000**	4,000	4,000	65,000	**69,000**	4,000
CHINA	2,800	60,000	**62,800**	2,000	2,000	55,000	**57,000**	1,500
GEORGIA	2,500	40,000	**42,500**	1,400	1,400	45,000	**46,400**	1,000
IRAN	600	18,000	**18,600**	2,000	2,000	18,000	**20,000**	0
SPAIN	200	9,500	**9,700**	500	500	12,000	**12,500**	600
FRANCE	0	12,000	**12,000**	2,000	2,000	8,500	**10,500**	0
OTHERS	0	31,000	**31,000**	0	0	31,600	**31,600**	0
WORLD TOTAL	**235,600**	**1,122,600**	**1,358,200**	**152,500**	**152,500**	**1,264,900**	**1,417,400**	**165,600**
WORLD CONSUMPTION (Supply-End. Stock)				**1,205,700**				

Estimated World Hazelnut Production. Kernel Basis · Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
TÜRKIYE	107,500	325,000	**432,500**	67,500	67,500	392,500	**460,000**	75,000
ITALY	2,150	39,700	**41,850**	910	910	40,000	**40,910**	2,100
USA	1,100	37,200	**38,300**	440	440	39,600	**40,040**	440
CHILE	2,150	28,100	**30,250**	1,120	1,120	26,100	**27,220**	1,075
AZERBAIJAN	880	25,000	**25,880**	1,500	1,500	24,700	**26,200**	1,520
CHINA	1,120	24,000	**25,120**	800	800	22,000	**22,800**	600
GEORGIA	925	14,500	**15,425**	500	500	15,750	**16,250**	350
IRAN	270	7,600	**7,870**	840	840	7,560	**8,400**	0
SPAIN	90	4,300	**4,390**	225	225	5,400	**5,625**	270
FRANCE	0	4,800	**4,800**	800	800	3,400	**4,200**	0
OTHERS	0	13,000	**13,000**	0	0	13,300	**13,300**	0
WORLD TOTAL	**116,185**	**523,200**	**639,385**	**74,635**	**74,635**	**590,310**	**664,945**	**81,355**
CONSUMPTION (Supply-End. Stock)				**564,750**				

Sources: Black Sea Hazelnut Exporters Association, China Chamber of Commerce for Import and Export of Foodstuffs, Georgian Hazelnut Growers Association, AEOFRUSE and other INC sources. Season 2023/2024 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Macadamias

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

The information contained herein was prepared between mid-January and mid-March 2025.

South Africa. According to Macadamias South Africa, the preliminary 2025 crop estimate, based on a forecasting model, projects a 7% growth from 2024, reaching 93,588 metric tons, in-shell basis at 1.5% moisture content / 95,500 MT @3.5% m.c. Despite some regional variation, the overall outlook remains positive, with young trees looking very good and older orchards expected to deliver an average crop. High temperatures may impact nut size and weight. Further updates will follow as the season progresses.

China. Despite significant drought during bloom and heavy rain during harvest, total production in 2024 reached approximately 5,000 MT more than in 2023, driven by increased acreage. With favorable weather during the next bloom and harvest periods, the 2025 crop is expected to increase by another 5,000 to 10,000 MT.

The Chinese market remains strong for Small Styles 1 and 4, while the sawn roasted and salted NIS market has weakened due to lower domestic crop quality, and the inventory was anticipated to take time to clear.

Australia. The 2024 crop increased 11.5% from 2023, surpassing expectations despite challenging conditions. As announced by the Australian Macadamia Society, the 2025 crop is expected to be impacted by severe weather conditions following ex-Tropical Cyclone Alfred. Although it is too early to quantify the full impact, key growing regions experienced damaging winds, heavy rainfall and flooding. The first 2025 forecast projected a 5% year-on-year increase to 56,890 MT in-shell at 3.5% moisture. However, this forecast will be reviewed in light of cyclone-related damage, with an updated figure to be released by the end of March.

Kenya. Good flowering and fruit set were reported across orchards in various regions early in the year. A 5-8% increase in production compared to last year was anticipated, with the 2025 production forecasted at 47,500 MT (in-shell basis).

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

Country	2024				2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
SOUTH AFRICA*	n/r	89,200	**89,200**	n/r	n/r	95,500	**95,500**	n/r
CHINA	n/r	69,500	**69,500**	n/r	n/r	74,500	**74,500**	n/r
AUSTRALIA	n/r	53,950	**53,950**	n/r	n/r	56,890	**56,890**	n/r
KENYA	n/r	44,000	**44,000**	n/r	n/r	47,500	**47,500**	n/r
USA	n/r	15,000	**15,000**	n/r	n/r	15,500	**15,500**	n/r
MALAWI	n/r	10,200	**10,200**	n/r	n/r	11,000	**11,000**	n/r
GUATEMALA	n/r	10,000	**10,000**	n/r	n/r	12,000	**12,000**	n/r
VIET NAM	n/r	8,000	**8,000**	n/r	n/r	8,000	**8,000**	n/r
BRAZIL	n/r	6,500	**6,500**	n/r	n/r	5,000	**5,000**	n/r
COLOMBIA	n/r	1,100	**1,100**	n/r	n/r	1,150	**1,150**	n/r
OTHERS	n/r	17,100	**17,100**	n/r	n/r	17,200	**17,200**	n/r
WORLD TOTAL	**n/r**	**324,550**	**324,550**	**n/r**	**n/r**	**344,240**	**344,240**	**n/r**
ESTIMATED WORLD CONSUMPTION (Supply-End. Stock)				**324,550**				

Estimated World Macadamia Production. Kernel Basis · Metric Tons

Country	2024				2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
SOUTH AFRICA*	n/r	28,800	**28,800**	n/r	n/r	30,600	**30,600**	n/r
CHINA	n/r	17,400	**17,400**	n/r	n/r	21,500	**21,500**	n/r
AUSTRALIA	n/r	17,300	**17,300**	n/r	n/r	18,200	**18,200**	n/r
KENYA	n/r	8,800	**8,800**	n/r	n/r	9,500	**9,500**	n/r
USA	n/r	3,300	**3,300**	n/r	n/r	3,400	**3,400**	n/r
MALAWI	n/r	2,500	**2,500**	n/r	n/r	2,800	**2,800**	n/r
GUATEMALA	n/r	2,000	**2,000**	n/r	n/r	2,400	**2,400**	n/r
VIET NAM	n/r	2,000	**2,000**	n/r	n/r	2,000	**2,000**	n/r
BRAZIL	n/r	1,625	**1,625**	n/r	n/r	1,250	**1,250**	n/r
COLOMBIA	n/r	220	**220**	n/r	n/r	230	**230**	n/r
OTHERS	n/r	4,275	**4,275**	n/r	n/r	4,300	**4,300**	n/r
WORLD TOTAL	**n/r**	**88,220**	**88,220**	**n/r**	**n/r**	**96,180**	**96,180**	**n/r**
ESTIMATED WORLD CONSUMPTION (Supply-End. Stock)				**88,220**				

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

Pecans

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

The information contained herein was prepared between mid-January and February 2025.

Mexico. The 2024/25 crop is estimated to be 10% below the previous year. This downturn is attributed to high input costs (fertilizer, fuel, etc.) and seasonally unfavorable weather conditions, such as record high temperatures throughout the growing region, and water scarcity. Many operations of small and medium-sized producers have ceased to be adequately managed owing to economic unviability.

For the 2025/26 season, production is anticipated to be below average. Only the Sonora growing region has the prospect of an increased crop since it is coming from an off year. There has been no new planting in the last four years.

In-shell exports in 2024/25 were, at the time of reporting, down vs. the previous year, while kernel exports remained steady.

USA. As a result of the damage caused by Hurricane Helene, the USDA lowered the crop estimate to 122,879 metric tons. Based on satellite imagery evaluated by Land IQ on behalf of the American Pecan Council, it is estimated that the losses in Georgia totaled 16,329 MT, the bulk of the damage being sustained in orchards over 11 years old. It is estimated that between 90% and 95% of those orchards sustained severe damage, in most cases, the trees being torn out of the ground. Recovery is expected to take several years.

While color and overall quality appear to be good, based on early yield/shell-out data, the industry was, at the time of this report, producing 10% fewer halves than a year ago. In previous years when the US crop was off, imports made up the difference. However, due to weather disruptions, the Mexican crop is also smaller. Year-to-date pecan imports through January 2025 were off 17%. As such, the industry was already experiencing shortages of Mammoth and Junior Mammoth halves.

South Africa. Harvest 2025 is anticipated to start as of May, but early projections indicate promising results. At the time of reporting, growing conditions have been favorable and an on year was expected.

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
MEXICO	0	141,850	**141,850**	2,000	2,000	127,100	**129,100**	2,000
USA	56,452	139,141	**195,593**	68,971	68,971	122,879	**191,850**	63,504
SOUTH AFRICA	1,300	23,000	**24,300**	700	700	37,500	**38,200**	1,000
CHINA	0	6,000	**6,000**	50	50	3,500	**3,550**	50
ARGENTINA	0	3,000	**3,000**	0	0	3,000	**3,000**	0
AUSTRALIA	0	2,400	**2,400**	0	0	2,540	**2,540**	0
BRAZIL	0	4,500	**4,500**	0	0	1,800	**1,800**	0
OTHERS	0	3,600	**3,600**	0	0	3,600	**3,600**	0
WORLD TOTAL	**57,752**	**323,491**	**381,243**	**71,721**	**71,721**	**301,919**	**373,640**	**66,554**
WORLD CONSUMPTION (Supply-End. Stock)				**309,522**				

Estimated World Pecan Production. Kernel Basis · Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
MEXICO	0	70,925	**70,925**	1,000	1,000	66,100	**67,100**	1,040
USA	28,200	69,600	**97,800**	34,500	34,500	61,400	**95,900**	31,700
SOUTH AFRICA	650	11,500	**12,150**	350	350	18,750	**19,100**	500
CHINA	0	3,000	**3,000**	25	25	1,750	**1,775**	25
ARGENTINA	0	1,500	**1,500**	0	0	1,500	**1,500**	0
AUSTRALIA	0	1,250	**1,250**	0	0	1,321	**1,321**	0
BRAZIL	0	2,200	**2,200**	0	0	800	**800**	0
OTHERS	0	1,800	**1,800**	0	0	1,800	**1,800**	0
WORLD TOTAL	**28,850**	**161,775**	**190,625**	**35,875**	**35,875**	**153,421**	**189,296**	**33,265**
WORLD CONSUMPTION (Supply-End. Stock)				**154,750**				

Sources: COMENUEZ, USDA, South African Pecan Nut Producers Association, Argentine Pecan Committee, Brazilian Associations of Nuts and Dried Fruits, and other INC sources. Season 2023/2024 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Pine Nuts

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

The information contained herein was prepared between mid-January and February 2025.

Asia. In the 2024/25 season, Chinese production yielded a bumper crop, reviewed up from the previous estimate to 111,500 metric tons (in-shell basis). *Pinus koraiensis* is estimated to contribute 100,000 MT, *P. yunnanensis* approximately 10,000 MT, and *P. massoniana* 1,500 MT. Most of the *P. koraiensis* crop is utilized to produce fried open-mouth pine nuts for the domestic market, with approximately 35% of the production shelled and exported as kernels.

It was an average season for North Korean production, estimated at 30,000 MT. The Russian crop consisted of a medium-to-large crop of *P. koraiensis* of approximately 10,000 MT, along with a low yield of *P. sibirica*, estimated at 5,000 MT, due to drought. Mongolia presented a moderate harvest of about 7,000 MT.

Mediterranean. At the start of 2024, high prices in Türkiye led to buyer reluctance, but limited demand drove prices down, boosting exports to a record 1,134 MT of kernels. However, a sudden price surge in Q4 caused exports to drop sharply. By early 2025, exportable quantities were low, leading to a 48% year-on-year decline in January shipments. With limited supply and high prices, modest exports are expected for 2025. Meanwhile, Spain and Portugal saw rising prices in January due to raw material shortages, driving a surge in sales. Once demand was met, price increases slowed, stabilizing the market.

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

Country	2023/2024				2024/2025			
	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	40,000	33,500	**73,500**	20,000	20,000	111,500	**131,500**	80,000
NORTH KOREA	8,000	15,000	**23,000**	2,000	2,000	30,000	**32,000**	4,000
RUSSIA (Siberia)	2,500	6,500	**9,000**	800	800	15,000	**15,800**	1,000
MONGOLIA	500	5,000	**5,500**	1,000	1,000	7,000	**8,000**	2,400
AFGHANISTAN	2,000	4,400	**6,400**	320	320	2,300	**2,620**	720
PAKISTAN	1,500	4,300	**5,800**	980	980	800	**1,780**	480
SUBTOTAL	**54,500**	**68,700**	**123,200**	**25,100**	**25,100**	**166,600**	**191,700**	**88,600**
MEDITERRANEAN (Pinus pinea)								
TÜRKIYE	830	5,400	**6,230**	510	510	5,450	**5,960**	1,100
ITALY	0	950	**950**	0	0	625	**625**	0
PORTUGAL	960	700	**1,660**	310	310	500	**810**	0
SPAIN	790	2,070	**2,860**	250	250	500	**750**	0
OTHERS	0	360	**360**	0	0	330	**330**	0
SUBTOTAL	**2,580**	**9,480**	**12,060**	**1,070**	**1,070**	**7,405**	**8,475**	**1,100**
WORLD TOTAL	**57,080**	**78,180**	**135,260**	**26,170**	**26,170**	**174,005**	**200,175**	**89,700**
WORLD CONSUMPTION (Supply-End. Stock)				**109,090**				

Estimated World Pine Nut Production. Kernel Basis · Metric Tons

Country	2023/2024				2024/2025			
	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	10,000	8,375	**18,375**	5,000	5,000	27,875	**32,875**	20,000
NORTH KOREA	2,000	3,750	**5,750**	500	500	7,500	**8,000**	1,000
RUSSIA (Siberia)	625	2,120	**2,745**	260	260	4,450	**4,710**	300
MONGOLIA	125	1,250	**1,375**	250	250	1,750	**2,000**	600
AFGHANISTAN	970	2,200	**3,170**	160	160	1,180	**1,340**	370
PAKISTAN	720	2,150	**2,870**	490	490	410	**900**	245
SUBTOTAL	**14,440**	**19,845**	**34,285**	**6,660**	**6,660**	**43,165**	**49,825**	**22,515**
MEDITERRANEAN (Pinus pinea)								
TÜRKIYE	200	1,300	**1,500**	120	120	1,280	**1,400**	250
ITALY	0	190	**190**	0	0	125	**125**	0
PORTUGAL	170	150	**320**	65	65	100	**165**	0
SPAIN	140	400	**540**	48	48	100	**148**	0
OTHERS	0	75	**75**	0	0	70	**70**	0
SUBTOTAL	**510**	**2,115**	**2,625**	**233**	**233**	**1,675**	**1,908**	**250**
WORLD TOTAL	**14,950**	**21,960**	**36,910**	**6,893**	**6,893**	**44,840**	**51,733**	**22,765**
WORLD CONSUMPTION (Supply-End. Stock)				**30,017**				

Sources: China Chamber of Commerce for Import and Export of Foodstuffs and other INC sources.

Pistachios

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

The information contained herein was prepared between mid-January and February 2025.

USA. California's 2024/25 season is classified as an off-year, with an estimated crop of 503,700 metric tons (1.1 billion pounds), in-shell basis. Combined with a carryover of around 84,000 MT (185 million pounds), total supply is among the lowest in recent years. This, alongside strong demand for the 2023/24 crop, has driven prices higher since the market opened in September 2024. Favorable chill hours suggest a promising outlook for the 2025/26 crop.

Year-to-date total shipments as of December 2024 were 181,800 MT (400 M lbs.), a 22% decrease from last year's YTD total of 232,000 MT (511 M lbs.), but a 36% increase from 2022's total of 134,000 MT (295 M lbs.). All in all, there is continuous strong demand for pistachios across all markets, underlining the positive momentum for long-term growth.

Türkiye. As anticipated, the Turkish pistachio harvest has reached a record level this season. Price expectations for the season started off promising compared to the previous year's crops. At the beginning of the season, raw material prices in Turkish lira decreased by approximately 30%, which encouraged some exporters to secure longer-term contracts. However, as the harvest progressed, supply from farmers became more limited, leading to prices returning to their pre-harvest levels. Moving forward into the second half of the year, exports have slowed down, and prices have stabilized.

Driven by strong demand for "Dubai chocolate," domestic consumption saw a significant increase —rising by approximately 40% compared to the local consumption of previous crops.

Iran. As reported by the Iran Pistachio Association, the 2024/25 crop exceeded initial expectations, reaching 200,000 MT (in-shell). However, extreme heat and irrigation disruptions led to smaller sizes and higher percentage of closed shells.

Year-to-date exports (September 22, 2024-January 20, 2025) reached 102,000 MT (in-shell equivalent), up 80% from 2023/24. The export-to-opening inventory ratio stood at 44%, up from the 37% average in recent years. Kernel exports (36% of total shipments) also showed steady growth, surpassing the four-year average of 30%.

Monthly exports in the fourth marketing month reached 19,000 MT, a 73% increase from the previous year. Major export destinations were re-export markets (namely, Türkiye and the UAE), followed by the Indian sub-continent. The Commonwealth of Independent States (CIS) countries also showed strong demand.

Demand for green peeled pistachio kernels (GPPK) remains high. However, Iranian government restrictions have limited shipments to the EU during the first quarter of the current marketing year. As of this report, there were signs that these restrictions may be easing, with exports to Europe expected to resume shortly. Non-EU markets for GPPK continue to grow.

Spain. The 2024/25 crop was revised down to 4,500 MT, 10% down from the previous estimate of 5,000 MT. Quality was overall better than the previous season. The 2025/26 crop is anticipated to hit a historical high of 9,000 MT. However, the final outcome will depend on successful blooming.

Despite a substantial crop in major producing countries such as Türkiye and Iran, concerns remain in the European market regarding limited pistachio availability. Geopolitical challenges have disrupted exports from the Mersin Free Zone in Türkiye, which has driven prices up and slowed industry activity across Europe.

While the domestic processing sector is still developing, with many small-scale companies needing to adapt, these challenges present opportunities for growth and innovation to enhance industrial efficiency and meet rising demand.

China. Provided the absence of frost or drought during the spring bloom season, overall favorable weather conditions, and sufficient water supply, the crop size could potentially rebound to around 500 MT in 2025.

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
USA (M lbs)	164	1,493	**1,657**	185	185	1,109	**1,294**	175
USA (MT)	74,400	677,900	**752,300**	83,900	83,900	503,700	**587,600**	79,600
TÜRKIYE	95,000	180,000	**275,000**	50,000	50,000	415,500	**465,500**	243,400
IRAN	20,000	168,000	**188,000**	30,000	30,000	200,000	**230,000**	30,000
SYRIA	0	25,500	**25,500**	0	0	28,050	**28,050**	0
GREECE	0	4,500	**4,500**	0	0	6,000	**6,000**	300
SPAIN	0	6,000	**6,000**	0	0	4,500	**4,500**	0
AUSTRALIA	0	1,400	**1,400**	0	0	4,450	**4,450**	0
ITALY	50	4,100	**4,150**	0	0	2,800	**2,800**	0
AFGHANISTAN	0	2,500	**2,500**	0	0	2,500	**2,500**	0
CHINA	0	500	**500**	0	0	300	**300**	0
WORLD TOTAL	**189,450**	**1,070,400**	**1,259,850**	**163,900**	**163,900**	**1,167,800**	**1,331,700**	**353,300**
WORLD CONSUMPTION (Supply-End. Stock)				**1,095,950**				

Sources 2023/24: Iran Pistachio Association, Greek Nuts & Fruits Trade Association, Australia Pistachio Growers' Association, Istat and other INC sources.
Sources 2024/25: Iran Pistachio Association, Greek Nuts & Fruits Trade Association, Australia Pistachio Growers' Association and other INC sources.
Season 2023/2024 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Walnuts

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

The information contained herein was prepared between mid-January and February 2025.

China. The early crop forecast was revised upward to 1.55 million metric tons (in-shell basis), 15% up from 2023/24, due to favorable weather. Between September and November 2024, in-shell exports surged 97% to 113,327 MT and shelled exports rose 77% vs. 2023 to 35,698 MT.

In early 2025, prices remained firm amid robust demand ahead of the Spring Festival. The market was expected to stay strong as premium variety stocks were quickly being depleted, tightening supply before the next harvest.

USA. As reported by the California Walnut Board and Commission, shipments through January 2025 have been robust across Asia and Europe, matching or exceeding shipments from last year's record crop. With a shorter 2024 crop, very little uncommitted carry-out is anticipated.

Heavy precipitation in Northern California through December contributed to replenishing reservoirs, while January's cold, dry weather provided sufficient chilling hours. With 67% of existing acreage being 19 years old or younger, denser plantings and vigorous trees are expected to provide a reliable supply into the future.

Chile. As reported by Chilenut, a strong harvest is anticipated in 2025. Despite a reduced planted area of 41,700 hectares, favorable conditions are expected to drive production to around 168,200 MT.

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	120,000	1,350,000	**1,470,000**	50,000	50,000	1,550,000	**1,600,000**	80,000
USA	127,000	747,520	**874,520**	92,000	92,000	542,700	**634,700**	30,000
CHILE	1,900	181,648	**183,548**	542	542	134,576	**135,118**	400
UKRAINE	8,000	78,000	**86,000**	1,000	1,000	88,750	**89,750**	1,600
TÜRKIYE	0	65,000	**65,000**	0	0	48,000	**48,000**	0
ROMANIA	3,000	34,500	**37,500**	1,000	1,000	40,000	**41,000**	1,200
IRAN	0	40,000	**40,000**	0	0	35,000	**35,000**	0
INDIA	0	35,000	**35,000**	10,000	10,000	33,000	**43,000**	12,000
ARGENTINA	3,000	20,000	**23,000**	1,000	1,000	25,000	**26,000**	0
FRANCE	5,000	22,000	**27,000**	0	0	25,000	**25,000**	0
MOLDOVA	0	18,100	**18,100**	300	300	17,680	**17,980**	400
ITALY	0	12,850	**12,850**	0	0	14,900	**14,900**	0
HUNGARY	0	14,000	**14,000**	0	0	14,000	**14,000**	0
AUSTRALIA	0	7,000	**7,000**	0	0	14,000	**14,000**	0
SPAIN	0	14,000	**14,000**	0	0	13,000	**13,000**	0
OTHERS	0	23,000	**23,000**	0	0	23,100	**23,100**	0
WORLD TOTAL	**267,900**	**2,662,618**	**2,930,518**	**155,842**	**155,842**	**2,618,706**	**2,774,548**	**125,600**
WORLD CONSUMPTION (Supply-End. Stock)				**2,774,676**				

Estimated World Walnut Production, Kernel Basis · Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	52,800	594,000	**646,800**	22,000	22,000	682,000	**704,000**	35,200
USA*	50,900	327,900	**378,800**	40,500	40,500	238,800	**279,300**	13,200
CHILE	884	84,500	**85,384**	255	255	61,900	**62,155**	185
UKRAINE	3,520	31,600	**35,120**	410	410	34,590	**35,000**	620
TÜRKIYE	0	26,000	**26,000**	0	0	19,200	**19,200**	0
ROMANIA	1,350	15,300	**16,650**	440	440	17,600	**18,040**	530
IRAN	0	16,400	**16,400**	0	0	14,400	**14,400**	0
INDIA	0	11,600	**11,600**	3,300	3,300	10,900	**14,200**	4,000
ARGENTINA	1,300	8,600	**9,900**	430	430	10,700	**11,130**	0
FRANCE	2,100	9,500	**11,600**	0	0	10,500	**10,500**	0
MOLDOVA	0	8,000	**8,000**	132	132	7,250	**7,382**	165
ITALY	0	5,800	**5,800**	0	0	6,700	**6,700**	0
HUNGARY	0	6,020	**6,020**	0	0	6,020	**6,020**	0
AUSTRALIA	0	2,850	**2,850**	0	0	5,700	**5,700**	0
SPAIN	0	5,500	**5,500**	0	0	5,300	**5,300**	0
OTHERS	0	9,600	**9,600**	0	0	9,650	**9,650**	0
WORLD TOTAL	**112,854**	**1,163,170**	**1,276,024**	**67,467**	**67,467**	**1,141,210**	**1,208,677**	**53,900**
WORLD CONSUMPTION (Supply-End. Stock)				**1,208,557**				

Sources: California Walnut Board and Commission, Chilenut, Walnut Growers Association of Türkiye and other INC sources. *California Walnut Board and Commission does not measure in kernel basis. Kernel equivalent is an INC estimation. Season 2023/2024 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Peanuts

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

The information contained herein was prepared between mid-January and February 2025.

China. According to the Chinese Chamber of Commerce, the total planted area increased by 10% in season 2024/25 for the second consecutive year, driven by higher profitability compared to competing crops and adjustments in planting patterns. As a result, total production rose by 6% vs. 2023/24, to 18,983 million metric tons (in-shell basis).

However, weather disruptions significantly impacted the planting and growing seasons across major producing regions. High temperatures and drought during last spring's planting and emergence periods caused some root exposure, reducing yield. Additionally, continuous rain and cloudy weather in August led to poor flowering and lower yield per unit of land. Fortunately, reduced rainfall in mid-to-late September allowed for improved growth and better overall quality during the later stages of development.

India. As reported by the USDA FAS, production for marketing year 2024/25 is projected to reach 7.1 M MT, up 20% from the previous year. This growth is attributed to a 6% increase in the planted area to 5.6 M hectares and an improved yield of 1.29 MT/ha. The harvested area was, at the time of reporting, expected to rise by 10%.

The expansion in the planted area is driven by increased demand for peanut oil and higher prices received by farmers due to increased consumption in the snacking category. Additionally, peanuts' adaptability to semi-arid regions with limited water availability encouraged farmers to plant more. Industry sources reported increased planting in Gujarat and Rajasthan, the major peanut-producing states, with a notable shift from cotton to peanuts due to challenges in cotton production and lower prices. The Indian government's decision to levy import duties on edible oils, effective September 14, 2024, further incentivized domestic cultivation.

USA. As per the USDA NASS, the 2024/25 crop was, at the time of this report, projected to reach 7.1 M MT, up 10% from 2023/24. The harvested area was estimated at 711,000 ha, representing a 13% increase vs. the previous season, mainly due to lower relative prices for cotton, corn, and soybeans. Yield was estimated at 4.11 MT/ha, slightly below the 4.23 MT/ha recorded in 2023/24.

According to the University of Georgia Cooperative Extension, last year brought unique challenges for peanut producers across the United States. In Georgia, the leading producing state, the season began with delays because of a wet spring, followed by hot and dry conditions during summer. Additionally, hurricanes Debby and Helene disrupted key producing regions. Despite these obstacles, 2024/25 US peanut production is forecasted above the prior season.

Argentina. The Argentine Chamber of Peanuts (CAM) reported a 2024 (October-November) planted area of 469,772 ha, up by 13% from the previous season. According to the Department of Agriculture, as of January 2025, in Córdoba province, the country's main producing hub, the peanut crop was experiencing overall favorable conditions. Ideal weather during planting and crop establishment contributed to very good growth and development. The first fields that were planted had already reached the flowering stage.

As reported by the USDA FAS, the government permanently eliminated export taxes on peanuts, effective January 27, 2025, aiming to alleviate the strain on farmers of low global prices, high production costs, tax burden, and unfavorable weather conditions, particularly drought. The measure, welcomed by the agricultural sector, is expected to boost farmer profitability and global competitiveness.

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

Country	2023/2024				2024/2025			
	Beginning Stock	Crop	Total Supply	Ending Stock	Beginning Stock	Crop	Total Supply	Ending Stock
CHINA	92	17,990	**18,082**	796	796	18,980	**19,776**	679
INDIA	328	6,000	**6,328**	305	305	7,100	**7,405**	357
NIGERIA	449	4,300	**4,749**	463	463	4,300	**4,763**	442
USA	922	2,666	**3,588**	672	672	2,925	**3,597**	736
SENEGAL	577	1,728	**2,305**	540	540	1,700	**2,240**	580
ARGENTINA	98	940	**1,038**	60	60	1,605	**1,665**	114
SUDAN	677	1,386	**2,063**	563	563	1,000	**1,563**	223
BRAZIL	35	734	**769**	85	85	900	**985**	89
INDONESIA	102	880	**982**	106	106	840	**946**	75
GHANA	47	600	**647**	47	47	550	**597**	27
VIET NAM	44	383	**427**	32	32	370	**402**	32
COTE D'IVOIRE	0	240	**240**	0	0	240	**240**	0
NICARAGUA	0	201	**201**	0	0	215	**215**	0
MEXICO	21	80	**101**	22	22	85	**107**	23
SOUTH AFRICA	21	75	**96**	24	24	80	**104**	25
WORLD TOTAL	**4,308**	**47,752**	**52,060**	**4,499**	**4,499**	**50,572**	**55,071**	**4,113**
WORLD CONSUMPTION (Supply-End. Stock)				**47,560**				

Sources: China Chamber of Commerce for Import and Export of Foodstuffs, USDA, Argentine Chamber of Peanuts (CAM) and other INC sources. Season 2023/2024 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Dates

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

The information contained herein was prepared between mid-January and February 2025.

Date production in North Africa for the 2024/25 season has increased overall, but table date output is significantly lower due to unseasonal autumn weather. Despite some year-over-year declines, Middle Eastern countries are showing a rising trend in table date production, with growing domestic and export sales.

Southeast Asia remains a strong import market, driven by Ramadan demand, while European and American markets remain stable. Additionally, countries like India, Türkiye, Morocco, and the UAE (a key re-exporter) are seeing increased demand, further strengthening global trade in the table date category.

Estimated World Table Date Production. Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
SAUDI ARABIA	100,000	350,000	**450,000**	110,000	110,000	270,000	**380,000**	115,000
EGYPT	5,000	200,000	**205,000**	20,000	20,000	180,000	**200,000**	22,000
UAE	30,000	160,000	**190,000**	40,000	40,000	170,000	**210,000**	44,000
IRAN	15,000	135,000	**150,000**	7,500	7,500	130,000	**137,500**	7,000
ALGERIA	5,000	140,000	**145,000**	20,000	20,000	120,000	**140,000**	15,000
TUNISIA	3,000	135,000	**138,000**	15,000	15,000	120,000	**135,000**	5,000
IRAQ	2,000	65,000	**67,000**	12,000	12,000	70,000	**82,000**	15,000
MOROCCO	5,000	50,000	**55,000**	6,000	6,000	40,000	**46,000**	8,000
ISRAEL	3,000	40,000	**43,000**	10,000	10,000	35,000	**45,000**	11,000
USA	12,000	30,000	**42,000**	12,000	12,000	25,000	**37,000**	11,000
OMAN	7,000	26,000	**33,000**	6,000	6,000	25,000	**31,000**	5,500
PAKISTAN	0	25,000	**25,000**	5,000	5,000	25,000	**30,000**	6,000
SUDAN	2,500	8,000	**10,500**	1,000	1,000	6,000	**7,000**	1,000
LIBYA	300	3,000	**3,300**	300	300	3,000	**3,300**	300
OTHERS	20,000	40,000	**60,000**	25,000	25,000	39,800	**64,800**	30,000
WORLD TOTAL	**209,800**	**1,407,000**	**1,616,800**	**289,800**	**289,800**	**1,258,800**	**1,548,600**	**295,800**
WORLD CONSUMPTION (Supply-End. Stock)				**1,327,000**				

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.

Dried Apricots

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

The information contained herein was prepared between mid-January and February 2025.

Türkiye. As reported by the Aegean Exporters' Association, dried apricot exports saw a significant increase of 27% between August 1, 2024, and February 1, 2025, compared to the same period the previous year. Total exports reached 49,766 metric tons, reflecting strong global demand. Europe remained the largest market, importing 14,471 MT, an 18% rise from 2023/24. The USA followed with 8,175 MT, marking a 37% increase, while the Asia-Pacific region recorded one of the highest growth rates for the period, surging 50% to 5,766 MT.

Estimated World Dried Apricot Production. Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	7,000	87,170	**94,170**	7,000	7,000	107,517	**114,517**	10,000
IRAN	0	26,000	**26,000**	0	0	25,000	**25,000**	0
UZBEKISTAN	0	10,000	**10,000**	0	0	12,000	**12,000**	0
TAJIKISTAN	0	7,500	**7,500**	0	0	7,000	**7,000**	0
CHINA	0	3,750	**3,750**	0	0	4,900	**4,900**	0
AFGHANISTAN	0	5,000	**5,000**	0	0	3,500	**3,500**	0
USA	0	1,700	**1,700**	0	0	1,800	**1,800**	0
SOUTH AFRICA	0	1,017	**1,017**	0	0	1,200	**1,200**	0
OTHERS	0	30,200	**30,200**	0	0	30,800	**30,800**	0
WORLD TOTAL	**7,000**	**172,337**	**179,337**	**7,000**	**7,000**	**193,717**	**200,717**	**10,000**
WORLD CONSUMPTION (Supply-End. Stock)				**172,337**				

Sources: Aegean Exporters' Association, Iran Dried Fruit Exporters Association, and other INC sources. Season 2023/24 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Dried Cranberries

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

The information contained herein was prepared between mid-January and February 2025.

USA. According to USDA FAS, US exports of dried cranberries (prepared or preserved, HS code 200893) totaled 88,714 metric tons from January to November 2024, 17% up from the same period in 2023. The top destinations were the Netherlands, with year-on-year growth of +48%, China (+31%), Mexico (+10%), and Canada (-2%).

Estimated World Sweetened Dried Cranberry Production. Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
USA	9,740	131,721	**141,461**	9,367	9,367	142,321	**151,688**	8,880
CANADA	3,890	42,189	**46,079**	3,678	3,678	49,560	**53,238**	3,250
CHILE	557	9,890	**10,447**	360	360	10,670	**11,030**	378
WORLD TOTAL	**14,187**	**183,800**	**197,987**	**13,405**	**13,405**	**202,551**	**215,956**	**12,508**
WORLD CONSUMPTION (Supply-End. Stock)				**184,582**				

Source: INC. The cranberry crop is harvested in the fall. End-of-year statistics are measured as of August 31. 2024/2025 represents the estimate of production and supply through August 31, 2025.

Dried Figs

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

The information contained herein was prepared between mid-January and February 2025.

Türkiye. According to the Aegean Exporters' Association, 2024/25 exports (September 25, 2024 – February 1, 2025) totaled 32,583 metric tons, down 5% from 2023/24. However, export value surged 28% to US$200.2 million. Europe remained the top market, with 13,113 MT shipped to the EU.

Estimated World Dried Fig Production. Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
TÜRKIYE	7,000	67,000	**74,000**	8,000	8,000	60,000	**68,000**	5,000
IRAN	0	26,000	**26,000**	6,000	6,000	35,000	**41,000**	8,000
AFGHANISTAN	0	22,000	**22,000**	1,000	1,000	15,000	**16,000**	0
SPAIN	1,300	6,800	**8,100**	0	0	12,000	**12,000**	1,200
USA	1,500	6,700	**8,200**	1,500	1,500	7,300	**8,800**	1,000
GREECE	100	2,500	**2,600**	50	50	2,600	**2,650**	300
ITALY	0	1,000	**1,000**	0	0	2,500	**2,500**	0
OTHERS	0	5,600	**5,600**	0	0	5,700	**5,700**	0
WORLD TOTAL	**9,900**	**137,600**	**147,500**	**16,550**	**16,550**	**140,100**	**156,650**	**15,500**
WORLD CONSUMPTION (Supply-End. Stock)				**130,950**				

Sources: Aegean Exporters' Association, Iran Dried Fruit Exporters Association, Greek Nuts & Fruits Trade Association and other INC sources.

Prunes

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

The information contained herein was prepared between mid-January and February 2025.

USA. Growers' efforts to mitigate last summer's heat led to a slightly larger, high-quality crop. Consumption remains steady as awareness of healthy, high-quality foods grows and growers and handlers have increased support for market promotion and nutrition research through the California Prune Board.

Chile & Argentina. Chile Prunes reports favorable weather boosted yields, calibers, and quality, with 2025 Chilean production expected to exceed last season. Reduced fresh exports to China are anticipated to increase prune supply. January hail may cut Argentina's 2025 crop by 50%.

Estimated World Prune Production. Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
USA	36,204	82,000	**118,204**	49,500	49,500	68,000	**117,500**	47,000
CHILE	10,000	68,000	**78,000**	14,000	14,000	65,000	**79,000**	14,600
ARGENTINA	3,000	21,000	**24,000**	5,000	5,000	40,000	**45,000**	5,000
FRANCE	13,500	40,500	**54,000**	19,000	19,000	29,000	**48,000**	14,000
SERBIA	1,000	5,000	**6,000**	1,000	1,000	4,800	**5,800**	1,000
AUSTRALIA	0	820	**820**	150	150	2,000	**2,150**	0
ITALY	500	1,450	**1,950**	650	650	1,600	**2,250**	700
SOUTH AFRICA	0	796	**796**	0	0	850	**850**	0
WORLD TOTAL	**64,204**	**219,566**	**283,770**	**89,300**	**89,300**	**211,250**	**300,500**	**82,300**
ESTIMATED WORLD CONSUMPTION (Supply-End. Stock)				**194,470**				

Sources: California Prune Board, Chile Prunes Association, Bureau National Interprofessionnel du Pruneau (France), Australian Prune Industry Association and other INC sources. Season 2023/24 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres.

Raisins, Sultanas & Currants

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

The information contained herein was prepared between mid-January and February 2025.

Türkiye. As reported by the Aegean Exporters' Association, 2024/25 year-to-date international shipments of seedless raisins (September 1, 2024 – February 1, 2025) totaled 77,062 metric tons, marking a 31% decline from the same period in 2023/24. However, total export value rose by 17%, reaching US$271.7 million compared to US$231.9 million.

Europe remains the largest market, accounting for 40,866 MT —a 31% decrease from 2023/24— but with a 17% increase in total value, rising from US$124.9 million to US$146.7 million. The leading importers within Europe were the Netherlands (10,168 MT), Italy (8,115 MT) and Germany (6,623 MT). The UK continues to be the top single market, importing 22,540 MT —down 12% from the previous season— while the total value surged by 60%, reaching US$77.6 million compared to US$48.6 million.

Iran. As per the Iran Dried Fruit Exporters Association, the 2024/25 production was revised to 245,000 MT. Considering an expected ending stock of 20,000 MT and a local consumption of around 50,000 MT, this leaves around 175,000 MT available for export. Out of this exportable amount, 80,000 MT were utilized through December 2024.

USA. As of the reporting period, deliveries of the 2024/25 crop had begun to slow, with growers shifting their focus to preparations for the 2025/26 season. In California's raisin-growing region, late fall through mid-spring marks the rainy season, with an anticipated annual rainfall of approximately 11 inches (280 mm). The 2024/25 crop is of excellent quality, thanks to the ideal growing and drying conditions experienced throughout the season.

Shipments of the new crop started last October and are expected to continue through late next fall. With 2024/25 production projected to surpass the previous season, shipments were expected to pick up in early 2025.

China. The 2024/25 production has encountered challenges, with a smaller crop and lower quality affecting market dynamics. In the largest raisin-processing area, Turpan (Xinjiang Province), high temperatures in early summer disrupted fruit pollination, leading to reduced yields, as reported by the USDA FAS. While the marketing year 2023/24 started with 20,000 MT of stock, owing to weak local demand, exports hit a record high, resulting in a short ending stock, estimated at 5,000 MT. Stock is also expected to remain at a low level in 2024/25 due to the shorter production.

With raw material stock nearly depleted, as of this report, prices for Chinese green raisins showed an increase of approximately 8–10% compared to last year. Meanwhile, the price of Sultana raisins climbed by over 50%. Domestic sales remain sluggish.

South Africa. At the time of reporting, the current crop was looking very promising, with farmers' stock ranging between 90,000 MT and 110,000 MT, which equals approximately 97,000 MT of marketable product. No adverse weather conditions have been observed, and harvesting of raisin cultivars was expected to start from January 20, 2025. Excellent drying conditions with low to no rain were anticipated for January and February.

The total tonnage of raisins exported in 2024 has seen an increase year on year of about 40%, amounting to 77,991 MT.

Australia. As reported by Dried Fruits Australia, the spring bud burst period of 2024 benefited from ideal climate conditions, creating a strong foundation for a fruitful 2025 crop across all varieties. Additionally, near-perfect drying conditions have accelerated the harvest season, which is a highly positive development.

The forecast for the 2025 crop intake volume is promising, expected to exceed 15,000 MT, representing a 30% increase compared to 2024. In terms of quality, the overall outlook remains good, with only minor sunburn impact observed. As of this report, market conditions continued to be favorable, reinforcing optimism for a successful 2025 season ahead.

Estimated World Raisin / Sultana / Currant Production. Metric Tons

Country	2023/2024				2024/2025			
	Beginning Stock	Production	Total Supply	Ending Stock	Beginning Stock	Production	Total Supply	Ending Stock
INDIA	10,000	270,000	**280,000**	10,000	10,000	245,000	**255,000**	9,100
IRAN	8,000	150,000	**158,000**	0	0	245,000	**245,000**	20,000
TÜRKIYE	70,000	206,346	**276,346**	10,000	10,000	226,239	**236,239**	10,000
USA	59,000	155,000	**214,000**	44,000	44,000	174,000	**218,000**	47,000
CHINA	20,000	150,000	**170,000**	5,000	5,000	130,000	**135,000**	5,000
SOUTH AFRICA	6,000	89,700	**95,700**	0	0	96,700	**96,700**	0
UZBEKISTAN	0	60,500	**60,500**	3,000	3,000	63,000	**66,000**	0
CHILE	10,000	57,000	**67,000**	3,000	3,000	60,000	**63,000**	2,000
ARGENTINA	1,500	30,000	**31,500**	1,500	1,500	38,000	**39,500**	1,000
AFGHANISTAN	1,000	15,000	**16,000**	1,000	1,000	12,000	**13,000**	0
AUSTRALIA	450	7,309	**7,759**	450	450	11,875	**12,325**	200
GREECE	7,000	12,000	**19,000**	0	0	10,000	**10,000**	1,000
OTHERS	0	20,400	**20,400**	0	0	20,500	**20,500**	0
WORLD TOTAL	**192,950**	**1,223,255**	**1,416,205**	**77,950**	**77,950**	**1,332,314**	**1,410,264**	**95,300**
ESTIMATED WORLD CONSUMPTION (Supply-End. Stock)				**1,338,255**				

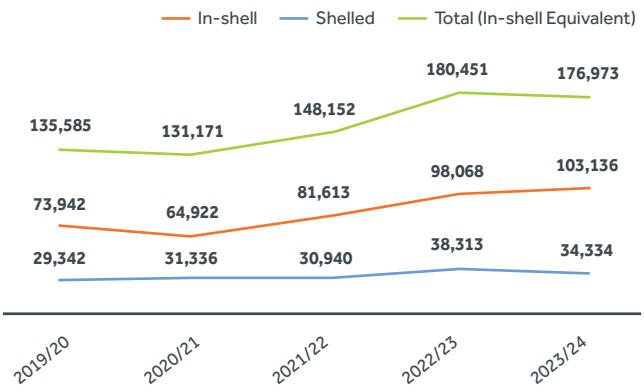
Sources: Aegean Exporters Association, Iran Dried Fruit Exporters Association, Raisins South Africa, Greek Nuts & Fruits Trade Association, Dried Fruits Australia and other INC sources. Season 2023/24 starts as of 2023 harvest; and 2024/2025 as of the 2024 harvest in both hemispheres, except South Africa where 2023/24 refers to the 2024 harvest and 2024/25 to the 2025 harvest.

Special Report:

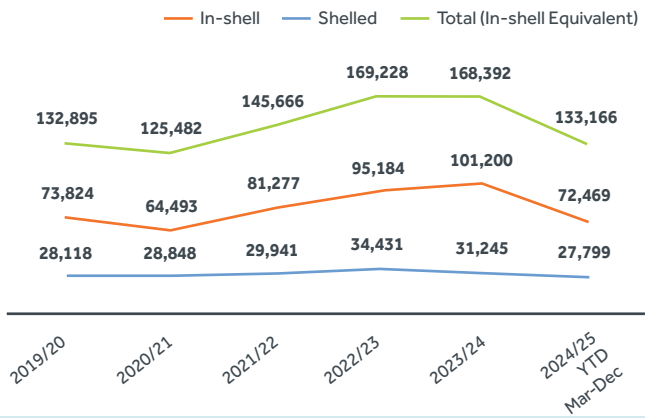
Chilean Walnut Exports

Source: Chilenut Monthly Shipment Reports

Chilean Walnut Exports (Metric Tons, Marketing Year Starting on March 21)



Chilean Walnut Exports (Metric Tons, Year-to-Date March 21-December 31)



Chilean Walnuts, In-shell Exports by Country of Destination (Metric Tons)

	Marketing Year Starting on March 21					CAGR (%)	YTD March-Dec
	2019/20	2020/21	2021/22	2022/23	2023/24		2024/25
Asia & Oceania							
India	4,743	11,148	20,664	26,202	48,962	79%	33,923
China	3,631	3,993	2,304	3,114	2,611	-8%	1,315
Viet Nam	5,162	4,645	4,816	1,482	522	-44%	146
Australia	4	9	9	10	8	21%	40
Others	2,091	1,089	346	255	196	-45%	181
Subtotal Asia & Oceania	**15,631**	**20,884**	**28,138**	**31,064**	**52,299**	**35%**	**35,605**
Middle East & Africa							
Türkiye	18,509	12,986	19,408	29,591	23,292	6%	10,541
Morocco	5,564	4,617	4,469	7,314	5,374	-1%	3,969
UAE	15,125	5,309	6,327	7,696	1,812	-41%	1,289
Lebanon	794	97	277	609	590	-7%	364
Others	734	853	1,222	1,578	1,288	15%	786
Subtotal Middle East & Africa	**40,726**	**23,863**	**31,702**	**46,787**	**32,356**	**-6%**	**16,949**
Europe							
Italy	7,782	6,551	7,985	6,883	7,721	0%	8,362
Spain	2,895	2,683	3,518	3,781	3,013	1%	3,145
Germany	1,855	3,113	1,332	1,077	1,358	-8%	1,378
Russia	1,182	1,234	485	591	658	-14%	873
Netherlands	32	165	1,187	1,286	563	105%	440
UK	0	120	163	158	198	-	172
Portugal	84	100	322	234	96	3%	78
France	32	19	58	19	25	-6%	690
Lithuania	20	83	61	240	17	-4%	1,522
Poland	0	73	59	133	10	-	0
Belgium	183	227	1,234	423	5	-59%	26
Others	1,879	3,878	3,564	3,814	2,796	10%	1,235
Subtotal Europe	**15,944**	**18,248**	**19,966**	**18,638**	**16,461**	**1%**	**17,921**
Americas							
Brazil	539	828	417	529	947	15%	725
Peru	898	631	1,156	758	852	-1%	1,013
Ecuador	107	90	82	96	77	-8%	164
Uruguay	2	0	13	14	7	38%	5
Others	94	378	138	182	137	10%	85
Subtotal Americas	**1,640**	**1,928**	**1,806**	**1,579**	**2,020**	**5%**	**1,993**
WORLD TOTAL	**73,942**	**64,922**	**81,613**	**98,068**	**103,136**	**9%**	**72,469**

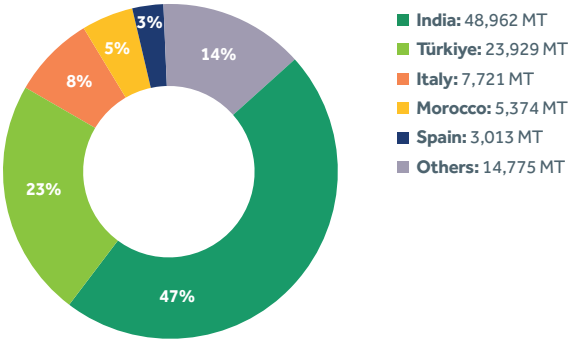
CAGR: Compound Annual Growth Rate 2019/20-2023/24 (%)
YTD: Year-to-Date March 21, 2024-December 31, 2024

Special Report:

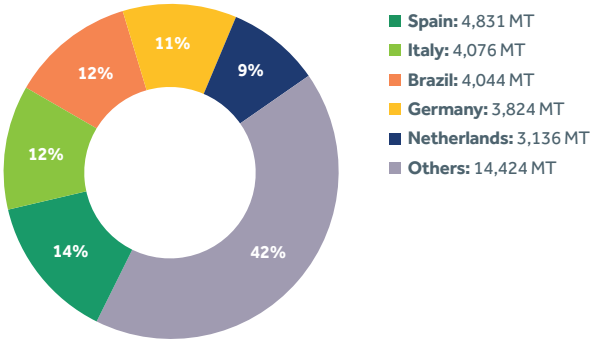
Chilean Walnut Exports

Source: Chilenut Monthly Shipment Reports

Chilean Walnuts, In-shell Exports, Top 5 Destinations
(2023/24, Marketing Year Starting on March 21)



Chilean Walnuts, Shelled Exports, Top 5 Destinations
(2023/24, Marketing Year Starting on March 21)



Chilean Walnuts, Shelled Exports by Country of Destination (Metric Tons)

	Marketing Year Starting on March 21					CAGR (%)	YTD March-Dec
	2019/20	2020/21	2021/22	2022/23	2023/24		2024/25
Europe							
Spain	2,797	2,344	3,417	4,026	4,831	15%	5,129
Italy	2,840	2,457	3,565	3,702	4,076	9%	3,144
Germany	7,731	8,559	5,348	5,164	3,824	-16%	3,496
Netherlands	1,423	1,954	3,320	5,603	3,136	22%	2,957
France	1,057	1,911	2,003	2,117	1,882	16%	1,667
UK	1,222	835	908	698	774	-11%	738
Portugal	650	843	674	1,218	726	3%	589
Belgium	148	270	326	363	563	40%	549
Switzerland	753	775	694	746	471	-11%	600
Russia	645	530	736	393	218	-24%	117
Lithuania	20	14	0	53	164	69%	442
Poland	146	265	197	120	110	-7%	180
Austria	495	894	455	70	70	-39%	142
Others	1,064	1,079	1,352	2,337	2,083	18%	1,752
Subtotal Europe	**20,990**	**22,729**	**22,994**	**26,609**	**22,928**	**2%**	**21,501**
Americas							
Brazil	3,077	2,614	2,536	3,478	4,044	7%	1,927
Ecuador	1,254	1,252	1,499	1,557	1,518	5%	1,225
Uruguay	291	413	369	537	537	17%	563
Peru	81	89	90	100	107	7%	44
Others	488	433	568	836	904	17%	643
Subtotal Americas	**5,190**	**4,801**	**5,063**	**6,508**	**7,109**	**8%**	**4,402**
Middle East & Africa							
Türkiye	132	729	349	1,820	1,433	82%	204
UAE	654	623	685	1,174	373	-13%	565
Israel	342	437	154	329	324	-1%	228
Others	299	477	368	590	454	11%	221
Subtotal Middle East & Africa	**1,427**	**2,266**	**1,556**	**3,914**	**2,583**	**16%**	**1,218**
Asia & Oceania							
India	417	553	138	338	806	18%	153
South Korea	454	301	435	259	378	-5%	152
Japan	334	144	387	245	289	-4%	171
Australia	203	203	163	174	152	-7%	67
Others	327	338	205	266	90	-28%	115
Subtotal Asia & Oceania	**1,735**	**1,540**	**1,328**	**1,281**	**1,714**	**0%**	**657**
WORLD TOTAL	**29,342**	**31,336**	**30,940**	**38,313**	**34,334**	**4%**	**27,778**

CAGR: Compound Annual Growth Rate 2019/20-2023/24 (%)
YTD: Year-to-Date March 21, 2024-December 31, 2024

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Pistachios: A Natural Source of Lutein for Eye Health

AMERICAN PISTACHIO GROWERS

A new study from researchers at the Friedman School of Nutrition Science and Policy at Tufts University found that eating just two handfuls of pistachios every day may significantly improve eye health by increasing levels of the key antioxidant lutein, which helps protect vision.

In the study,[1] otherwise healthy middle-aged and older adults who ate two ounces (57 grams) of pistachios, which have measurable amounts of lutein,[2] had an increase in macular pigment optical density (MPOD) after just six weeks compared to participants who did not consume pistachios. MPOD filters harmful blue (visible) light and protects against age-related macular degeneration, which is one of the leading causes of blindness in older adults.[3]

Pistachios contain far more lutein than other nuts.[2] The researchers found that lutein intakes nearly doubled and blood lutein levels were significantly elevated in participants involved in the study. The research suggests that pistachios and their lutein content could be a simple and natural way to help reduce the risk of age-related macular degeneration.

"Higher intake of foods with lutein has been associated with beneficial effects for the eyes. Our study enhances our understanding of the link between nutrition and eye health," notes Dr. Tammy Scott, a research and clinical neuropsychologist and lead author of the study. She adds that pistachios also provide a source of healthy fat, potentially enhancing the body's absorption of lutein from these nuts.

The health benefits from eating pistachios may also happen quickly. In fact, this study found that it only takes six weeks of daily pistachio consumption to start seeing possible eye health benefits. "It's never too early to start to think about what you can do to support healthy aging," Dr. Scott adds. This study, along with a growing body of research, continues to show that adding pistachios to your daily routine is a simple way to invest in long-term health.

For more information on the research behind the health benefits of pistachios plus recipes to inspire your tastebuds, visit www.americanpistachios.org.

Photo: American Pistachio Growers.

"New research shows that eating two handfuls of pistachios daily may help protect the eyes from blue light damage and could reduce the risk of age-related vision problems."

References:
1. Scott, T. M., et al. (2024). Pistachio consumption increases macular pigment optical density in healthy adults: A randomized controlled trial. *Journal of Nutrition*. Advance online publication. https://doi.org/10.1016/j.tjnut.2024.10.022. **2.** U.S. Department of Agriculture. (n.d.). FoodData Central, FDC ID: 170185. USDA. https://fdc.nal.usda.gov/fdc-app.html#/food-details/170185/nutrients. **3.** Centers for Disease Control and Prevention. (2024, May 15). Prevalence estimate for age-related macular degeneration (AMD). CDC. https://www.cdc.gov/vision-health-data/prevalence-estimates/amd-prevalence.html

California Walnut Industry's Commitment to Quality and Availability

The California walnut industry continues to deliver on its promise of quality and availability of California walnuts for customers around the globe. While the 2024 crop size was smaller than anticipated, the industry is committed to providing a stable supply to meet customer needs.

The current crop reduction resulted from a combination of factors that were unique situation for the industry: walnuts are alternate bearing and 2023 was the largest crop on record; mother nature's impact of irregular winter and spring temperatures led to a lighter nut set; and adjustments in acreage continued with many of the removed orchards being older, less desirable varieties.

California's walnut growers are resilient and well-positioned to navigate current market challenges and seize new opportunities. Sixty-seven percent of the existing walnut acreage is 19 years old or younger and benefits from denser plantings. California's rich soils and Mediterranean-like climate create ideal conditions for walnut cultivation and most walnut farms are located in areas with ample water supply, with California receiving sufficient rainfall to ensure the health of our orchards. While precise insights into the 2025 crop size will not be available until late summer, California walnut growers remain confident in their ability to deliver an ample supply of delicious walnuts to meet global customer needs.

The industry is also investing in the future through innovations in new varieties that continue to deliver color, taste, texture, and quality that customers desire. Activities will continue to expand demand-building with retailers, foodservice providers, food manufacturers, and consumers to excite and increase consumption of walnuts globally.

"The California walnut industry is committed to delivering high-quality walnuts, matching the strong global demand our walnuts generate," said Davin Norene, chairman of the California Walnut Commission. "Customers should feel confident that California can meet the expectations of consumers worldwide."

Looking to the future, focus remains steadfast on delivering premium walnuts to customers year-round, utilizing technology and best practices to ensure customers' expectations are met for quality and condition. California walnuts will continue to be a dependable and superior choice for customers around the world.

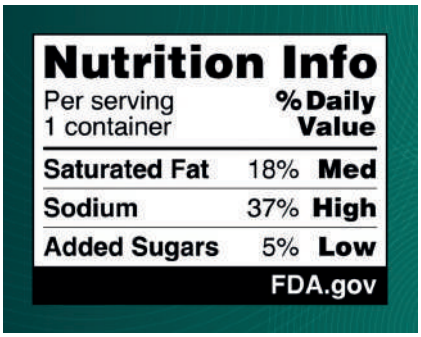
"California's walnut growers are resilient and well-positioned to navigate current market challenges and seize new opportunities."

News From the INC Nutrition Research & Education Foundation (INC NREF)

MAUREEN TERNUS, M.S., R.D.N.

Executive Director

In recent weeks, food and nutrition policy has been in the headlines in the US. In December, the scientific report[1] of the Dietary Guidelines Advisory Committee (DGAC) was released, along with the Food and Drug Administration's (FDA) final rule[2] to update the nutrient content claim "healthy." A few weeks later, FDA announced its proposed rule requiring a front-of-package (FOP) nutrition label on most packaged foods. All of these will have an impact on nuts and nut products.



FDA proposed FOP nutrition label, referred to as the Nutrition Info box. Image: FDA.

Dietary Guidelines for Americans

Every five years, the *Dietary Guidelines for Americans* are updated. INC NREF has submitted both oral and written comments for each edition of the guidelines dating back to 2000. In recent submissions, INC NREF's comments focused on the health benefits of tree nuts and promoted a 1.5 ounce (43 gram) serving size (the amount recommended in the FDA qualified health claim for nuts and heart disease). While the serving size has not yet changed, nuts have moved to a more prominent place in the protein group, and in the guidelines overall, in the 2025 edition.

The DGAC has advised the US Department of Agriculture and Department of Health and Human Services —the two agencies that translate the scientific report into the actual guidelines for consumers— to "Emphasize consumption of vegetables, fruits, legumes (beans, peas, lentils), whole grains, nuts, and fish/seafood, which were common components found in dietary patterns that were associated with more desirable health outcomes."

The final guidelines will be released by the end of the year.

Go Nuts, Go Healthy

INC NREF has provided both oral and written comments (as far back as 2017) regarding the definition of the nutrient content claim "healthy." After more than eight years, FDA recently issued a final rule to update the claim. This rule aligns the definition of the "healthy" claim with current nutrition science and dietary recommendations.

In a statement, the agency explained: "Nuts and seeds, higher fat fish, such as salmon, certain oils, and water are examples of foods that did not qualify for the 'healthy' claim before but are foundational to a healthy eating pattern and recommended by the *Dietary Guidelines*. These foods now qualify to bear the 'healthy' claim."

FOP Nutrition Labels

FDA has proposed a required FOP nutrition label on most packaged foods to provide accessible, at-a-glance information to help consumers quickly and easily identify how foods can be part of a healthy diet. The proposed FOP nutrition label, referred to as the Nutrition Info box, would highlight the relative amounts of three nutrients —saturated fat, sodium, and added sugars— in a serving of food. Current federal dietary recommendations advise US consumers to limit these three nutrients to achieve a nutrient-dense diet within calorie limits.

Comments on the proposed rule can be submitted until May 16, 2025.

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

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Australian Macadamias Masterclass Strengthens Ties With China's Food and Beverage Sectors

The Australian macadamia industry hosted the Australian Macadamias Masterclass in Shanghai late last year, drawing more than 65 influential attendees from China's retail, e-commerce, food and beverage manufacturing, restaurant, and hospitality sectors.

"This first-of-its-kind event showcased the taste, texture, health cues, and versatility that Australian-grown macadamias bring to food products."

China is Australia's biggest export partner for macadamias, and this first-of-its-kind event showcased the taste, texture, health cues, and versatility that Australian-grown macadamias bring to food products such as chocolate, gelato, ice cream, and baked goods.

Attendance by representatives from Trade and Investment Queensland, Investment NSW, and Austrade's Trade and Investment Commissioner (Commercial) Lauren Gilbert, who delivered the official welcome, highlighted the strong Australian government support for the macadamia industry in this key export market. Australian Macadamias General Manager Marketing Jacqui Price provided a comprehensive industry overview to set the stage.

Four esteemed Chinese food experts shared their insights on how macadamias can elevate new product development:

- Lei Yang, Vice President of leading nut brand Bestnut, detailed how his company effectively markets Australian-grown macadamias to Chinese consumers, emphasising their premium appeal.
- Jacky Li, artisan ice cream expert, discussed the alignment between macadamias and China's evolving ice cream market, with growing demand for health-focused and artisanal offerings.
- Chocolatier Daniel Zhou, China Brand Ambassador of Barry Callebaut, explored the significant potential for macadamias in China's expanding chocolate sector, where unique flavours and textures are highly sought after.
- Stephanie Fan, Le Cordon Bleu–trained pastry chef, highlighted the nut's rich nutritional profile and creamy texture, demonstrating how they enhance the appeal of Chinese desserts and bakery creations.

Adding an interactive touch, Jacky and Stephanie conducted live demonstrations, skilfully crafting Australian Macadamia Coconut Ice Cream and Wasabi Macadamia Nut Mousse, offering attendees a chance to see —and more importantly taste— the possibilities first-hand.

During the post-masterclass networking session, guests eagerly sampled a range of macadamia-inspired delicacies, including Earl Grey Macadamia Nut Mousse, 100% Macadamia Nut Caramel Tart, Bonbon Praliné Macadamia (complete with the Australian Macadamias logo), and Australian Macadamia Cocoa Cookies Ice Cream.

Building on similar trade forums held in Japan and South Korea in 2023, this inspiring masterclass brought the innovation potential of Australian-grown macadamias to life, helping to expand the knowledge about macadamias as a versatile ingredient among China's food and beverage trade.

L to R: Jacky Li, Lei Yang, Jacqui Price, Stephanie Fan, Daniel Zhou.
Photo: Australian Macadamia Society.


Guests sampling macadamia-inspired delicacies.
Photo: Australian Macadamia Society

Chilean Walnuts: Good Prospects for 2025 Harvest

Photo: Chilenut.

As the 2025 walnut harvest approaches, Chile is poised for a successful season. With favorable conditions and a forecasted 20% increase in production, the industry is set to bounce back from last year's challenges.

A good walnut crop was anticipated in Chile, with the harvest of the earliest varieties, such as Serr and Howard, set to begin in March, followed by Chandler, the main variety planted in the country. Owing to favorable seasonal conditions, production in 2025 was expected to be 20% larger than the previous season, despite the fact that the total planted area has decreased to around 41,700 hectares, down from 46,214 hectares in 2022.

This season has been favorable for Chile's walnuts, and for its fruit crops in general, unlike last season, which saw various weather problems, including perhaps most notably a lack of chill hours during the winter that delayed and lengthened various development processes, resulting in lower production volumes.

The development of the current crop began several months ago with an auspicious winter, during which precipitation was abundant and chill hours were sufficient for good bud break. Spring conditions have also supported healthy flowering and fruit set, with fruit yields per plant ranging from normal to slightly higher than in previous seasons. This situation is evident in central Chile, where 67.5% of walnut production is concentrated, thanks to the 29,158 hectares of orchards in the Valparaíso, Metropolitan, and O'Higgins regions.

To the south, the regions of Maule, Ñuble, Biobío, and Araucanía promoted the development of the walnut industry some years ago and now boast more than 12,800 hectares of planted area, including young orchards that are still increasing their production. This region has experienced some complications during the current growing season, such as bacterial diseases in areas where the spring was wetter than normal, which may bring production down by 15-20% compared to a typical season.

Based on this information, the Chilean walnut 2025 harvest is estimated at 168,207 metric tons (in-shell basis), up by around 20% from last season but slightly lower than previous years due to the decrease in planted area driven by low walnut prices.

The NDFTA Is Looking Ahead to See How We Thrive in a Post-Brexit World

There remains much work to do in addressing the legacy of Brexit, as trade has undergone significant changes since the UK's departure from Europe. There is increasing divergence between EU and UK regulations, which increases complexity for our industry. Deciding whether to seek alignment or divergence from the EU is an ongoing topic of discussion.

Licenced by NDFTA member American Peanut Council.

As the Nut and Dried Fruit Trade Association (NDFTA) is the representative trade body for dried fruits and nuts in the UK, it is focused on addressing these legacy issues from Brexit, which are important to our membership. As an organisation, we are also about looking forward. Therefore, it is important that we play a role in shaping upcoming regulatory changes and ensuring that the interests of our sector are met in the future.

> *"It is important that we play a role in shaping upcoming regulatory changes."*

To support these activities, the NDFTA Board recognised that we needed to invest more resources in our Technical Committee, which leads on these matters on behalf of the NDFTA. In July 2024, we recruited a designated Chair to lead the Technical Committee. This was a key enabler that has allowed us to set up more working groups to address issues that really matter to our members, including the topics of nutrition and sustainability. This recent commitment has also allowed us to engage more directly with relevant UK authorities, such as the Food Standards Agency (FSA) and the Department for Environment, Food and Rural Affairs (Defra), on topics that are important for our membership.

As part of our strategy to engage with the UK authorities, we have participated in numerous consultations and have received good engagement on several points, resulting in feedback being considered regarding establishing a standardised approach across UK ports and access to port notification data. We will continue to expand our engagement with UK authorities, ensuring that our members' interests are well represented.

Our work would not be possible without the support from our wide network of European trade associations, such as FRUCOM, the European Snacks Association (ESA) and the INC, as well as our affiliations with larger UK organisations like the Food and Drink Federation (FDF). These organisations have provided us with expertise and better reach to liaise with relevant UK Government and European Commission stakeholders on broad issues that face our sector and the wider food industry.

The NDFTA will continue to develop the technical support it provides to its members, helping them navigate both their immediate and long-term challenges.

Find out more or sign up to become a member at www.ndfta.co.uk

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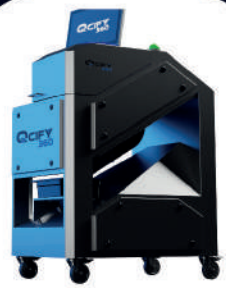

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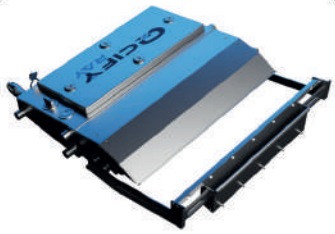

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