

International Nut & Dried Fruit Council

Nuts and Dried Fruits *International Trade*

Giuseppe Calcagni

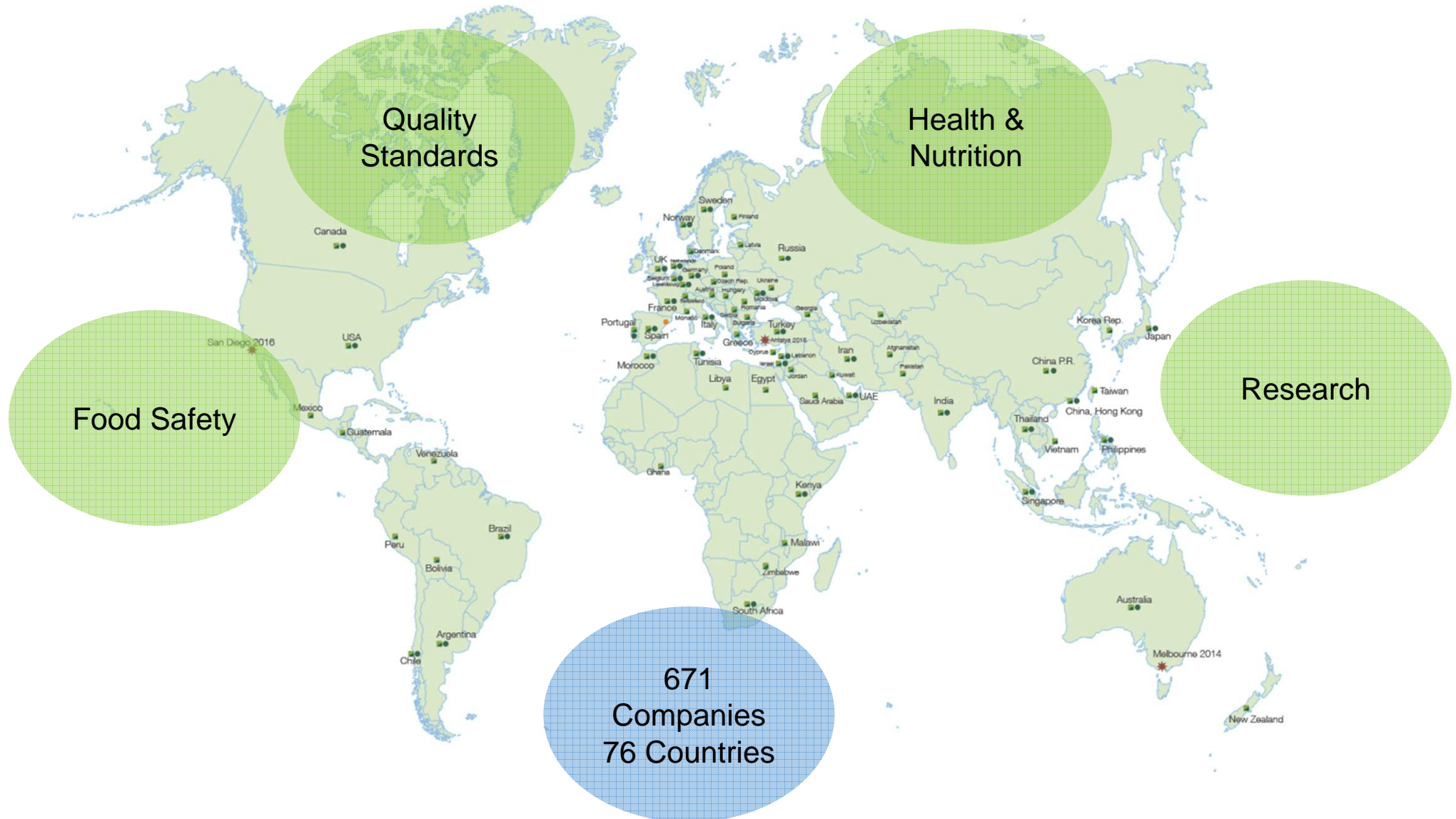
Vice Chairman

Chairman of the Scientific and Government Affairs Committee

Chairman of the Statistics Committee



Founded in 1983, INC's **Mission** is to be the International source for information on nuts and dried fruits.



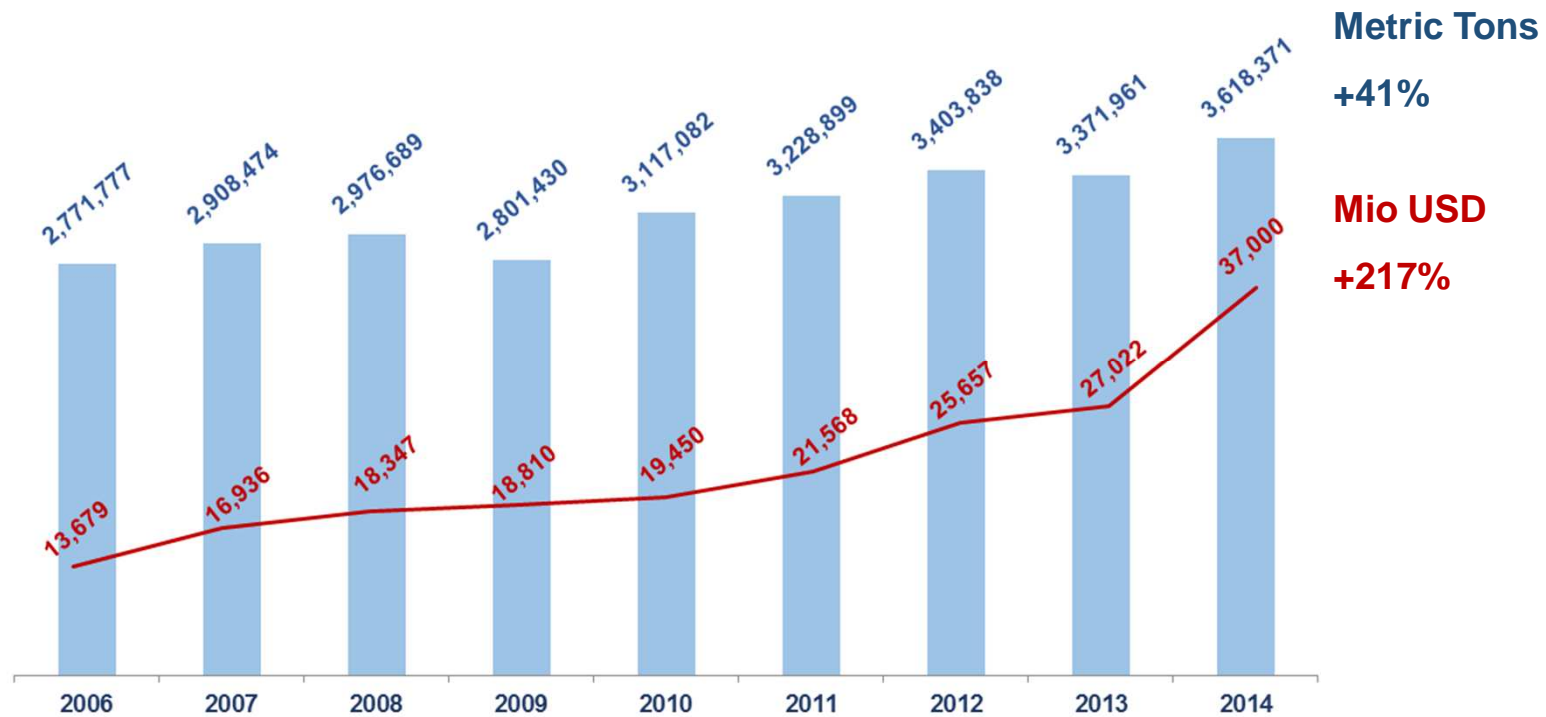
Agenda

1. Industry Overview
2. Trade Flows
3. Largest Trading Countries
4. Forecasts. Countries with the Highest Growth
5. Potentialities & Challenges

Industry Overview. Supply Value. Tree Nuts

World Tree Nut Production and Supply Value

- Production (Metric Tons)
- Supply Value (Million \$)



Source: INC.

Industry Overview. Supply Value. Dried Fruits

World Dried Fruit Production and Supply Value

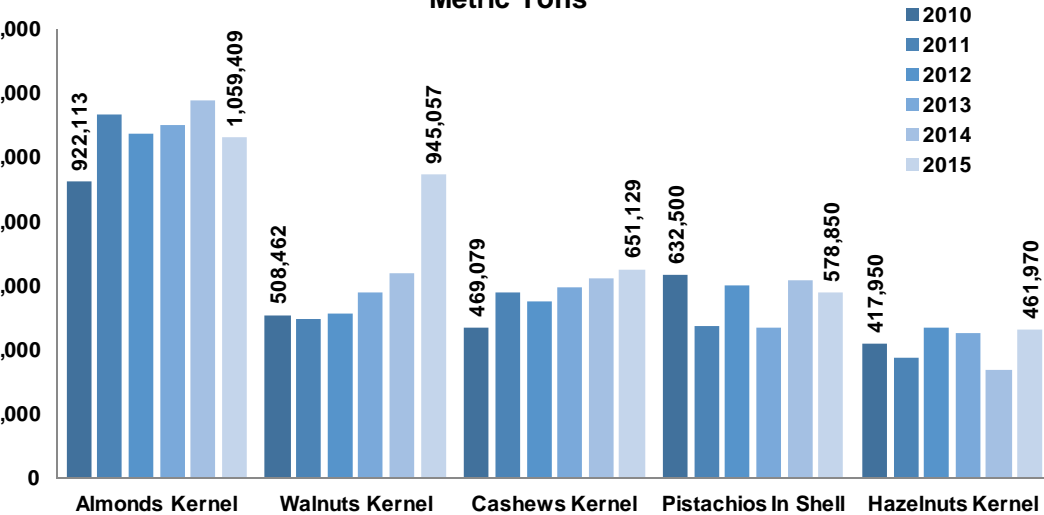
- Production (Metric Tons)
- Supply Value (Million \$)



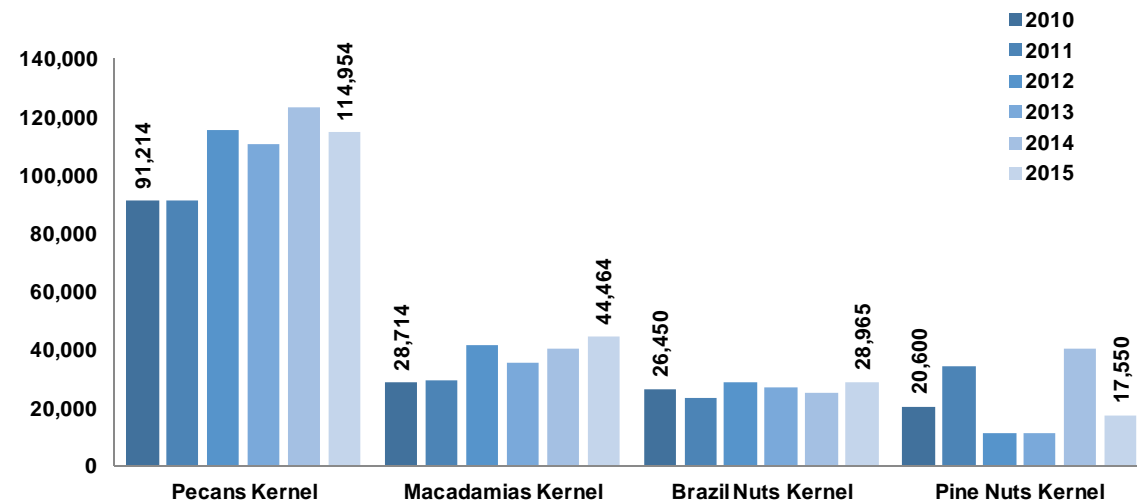
Source: INC.

Industry Overview. Production. Tree Nuts

**World Tree Nut Production
Metric Tons**

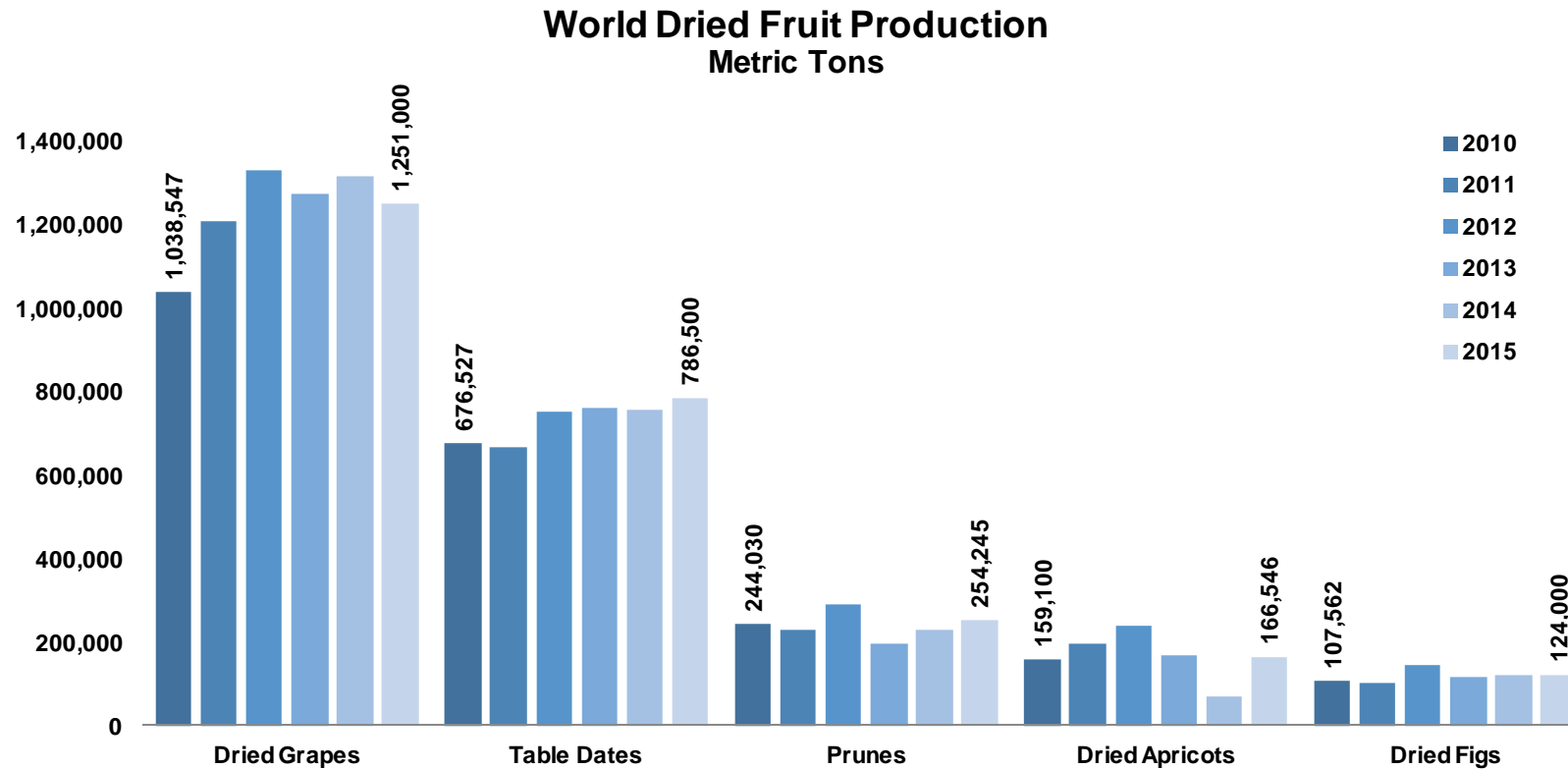


**World Tree Nut Production
Metric Tons**



Source: INC.

Industry Overview. Production. Dried Fruits

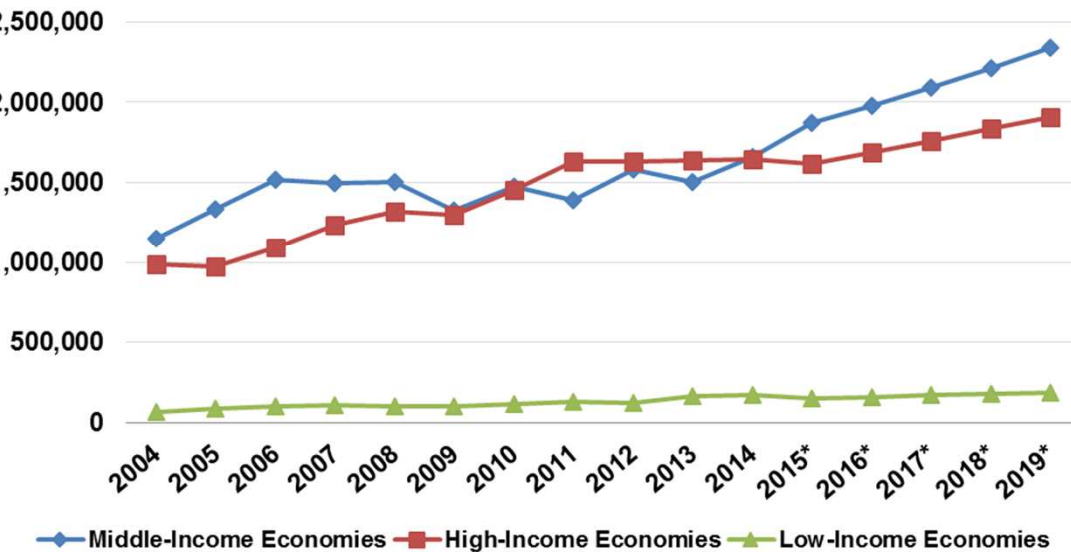


Source: INC.

Industry Overview. Income Group. Tree Nuts

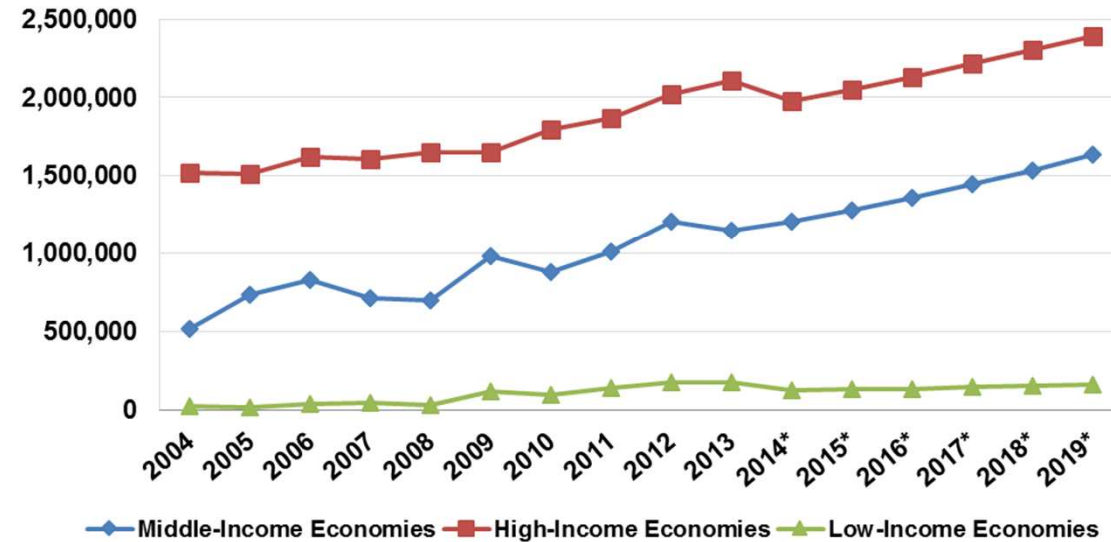
World Tree Nut Production by Income Group

Metric Tons, Kernel Basis, Except Pistachios Inshell



World Tree Nut Consumption by Income Group

Metric Tons, Kernel Basis, Except Pistachios Inshell



High-Income Economies: >12,746\$ GNI per capita

Middle-Income Economies: 1,046-12,745\$

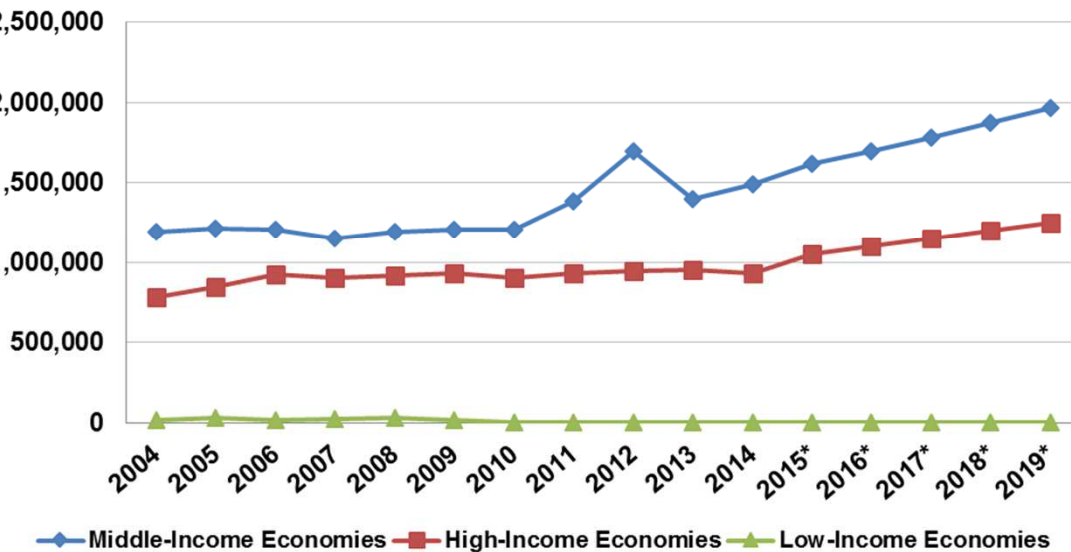
Low-Income Economies: <1,046\$

*Forecast. Source: INC and The World Bank.

Industry Overview. Income Group. Dried Fruits

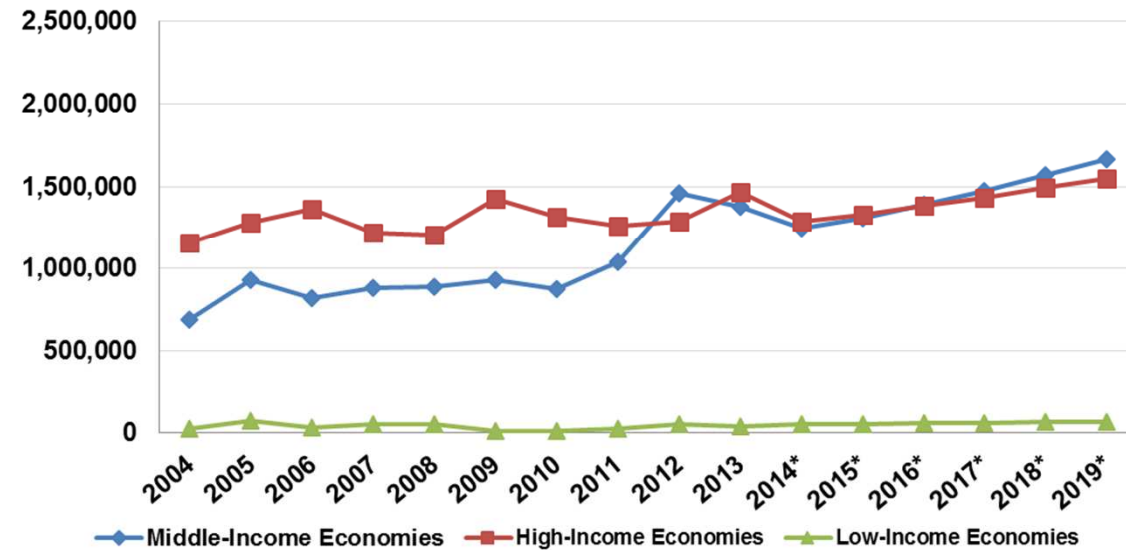
World Dried Fruit Production by Income Group

Metric Tons



World Dried Fruit Consumption by Income Group

Metric Tons



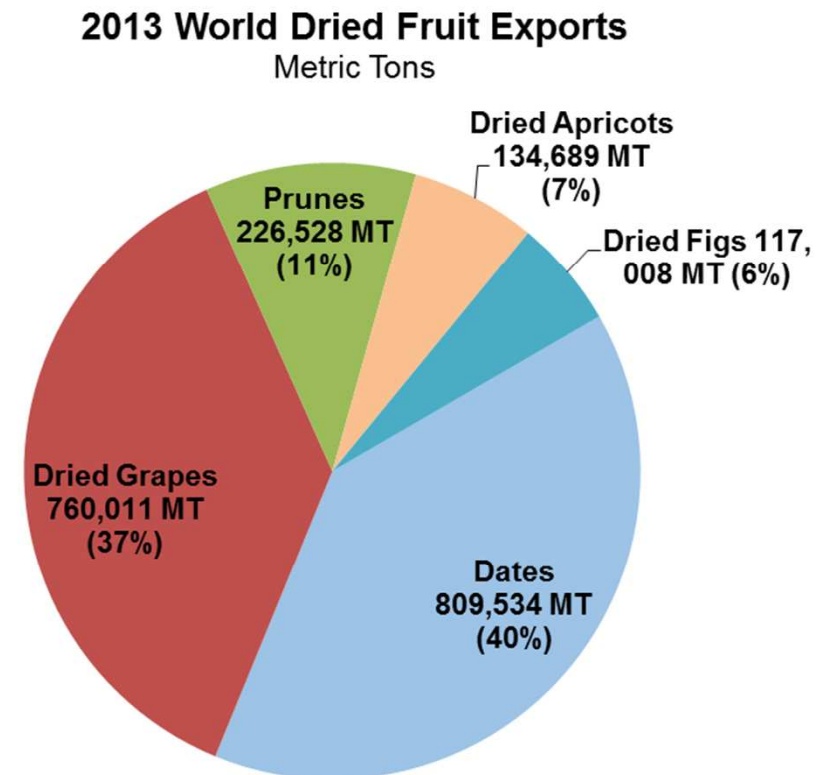
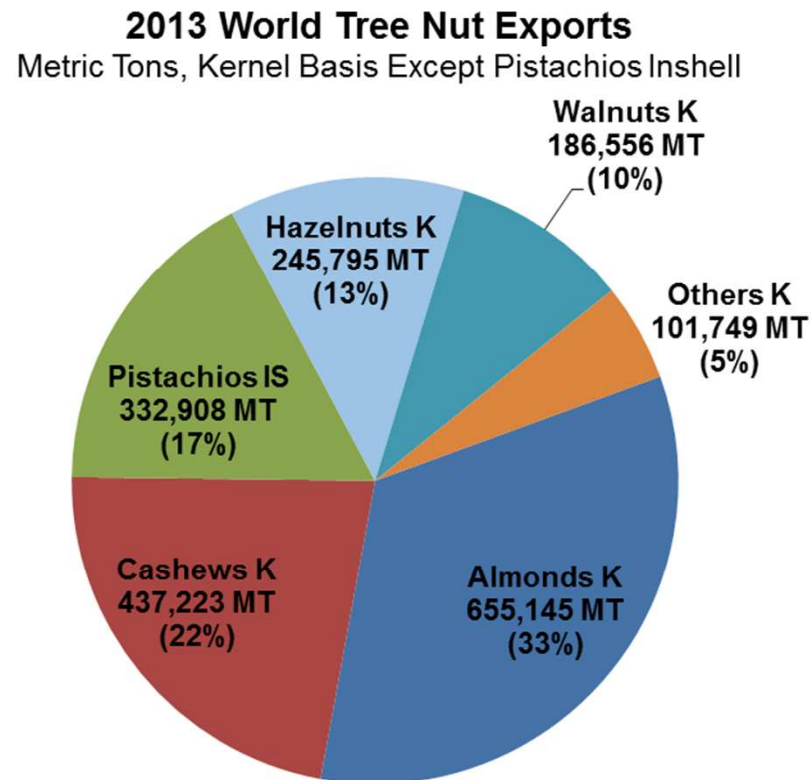
High-Income Economies: >12,746\$ GNI per capita

Middle-Income Economies: 1,046-12,745\$

Low-Income Economies: <1,046\$

*Forecast. Source: INC and The World Bank.

Industry Overview. Exports



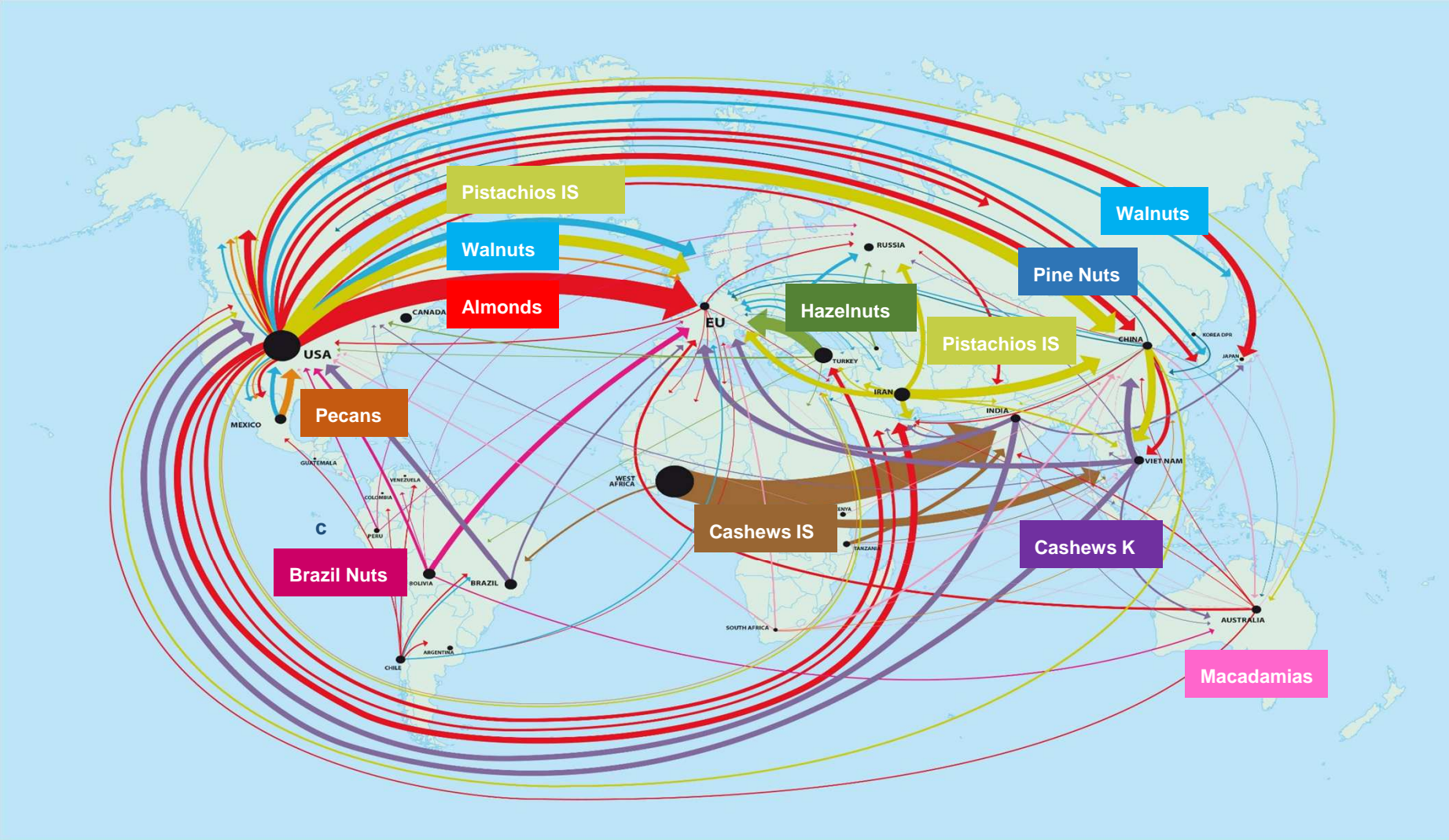
Source: INC and DESA/UNSD, United Nations Comtrade Database.

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4. Forecasts. Countries with the Highest Growth
5. Potentialities & Challenges

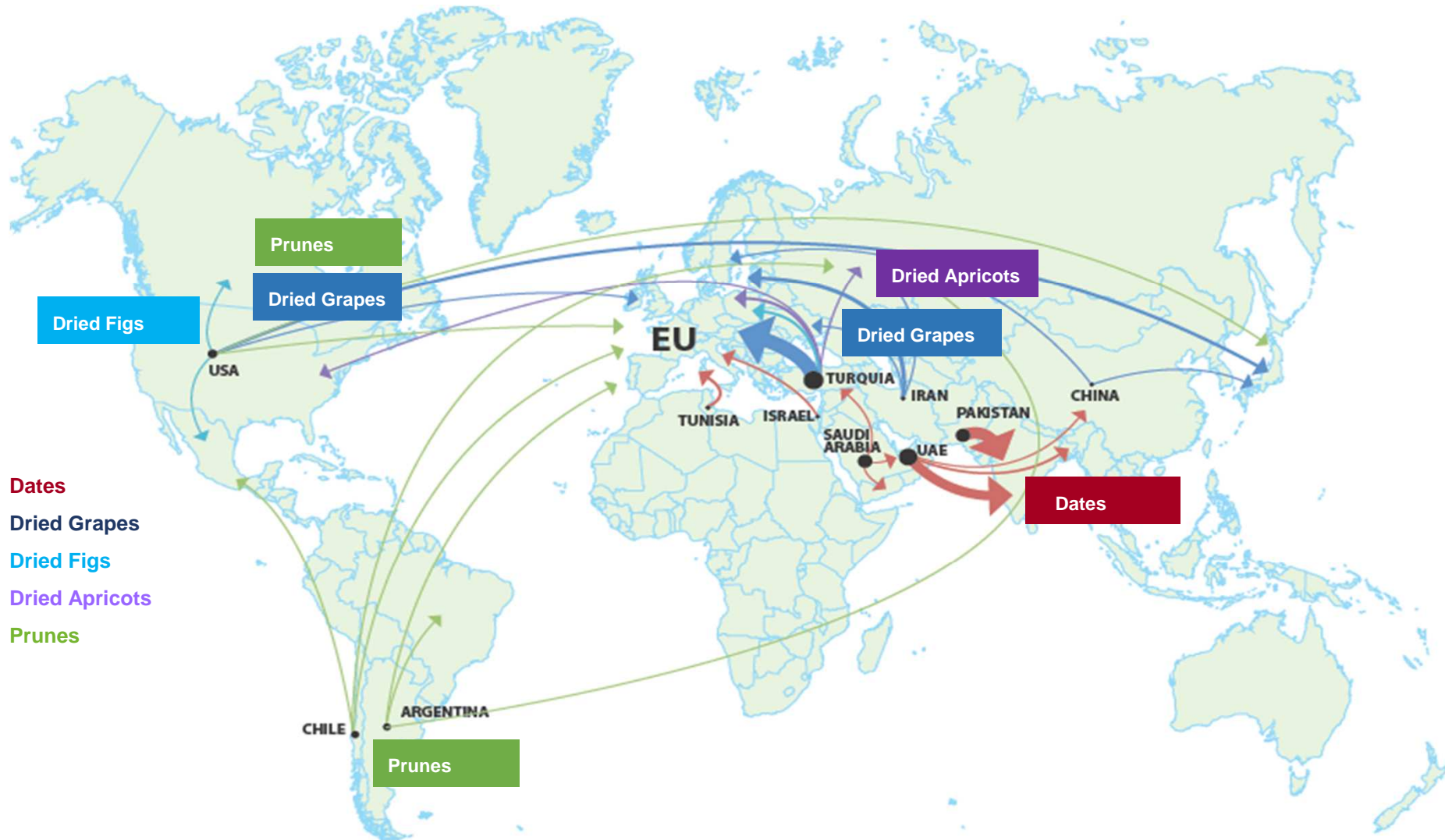
Trade Flows. Tree Nuts

Almonds
Brazil Nuts
Cashews IS
Cashews K
Hazelnuts
Macadamias
Pecans
Pine Nuts
Pistachios
Walnuts



Source: INC and DESA/UNSD, United Nations Comtrade Database.

Trade Flows. Dried Fruits

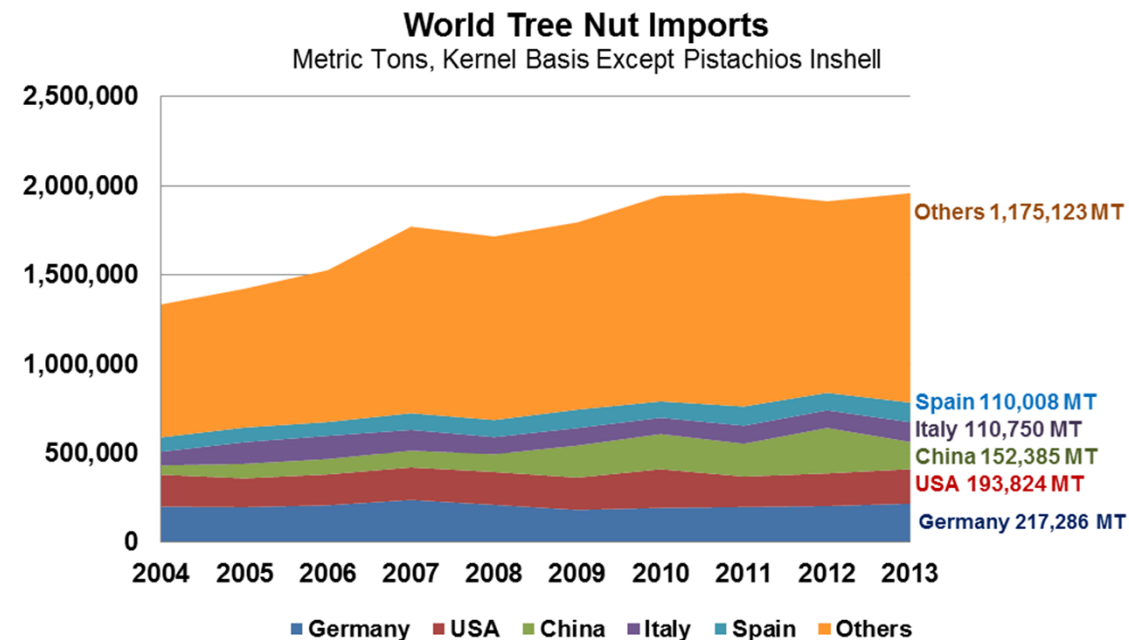
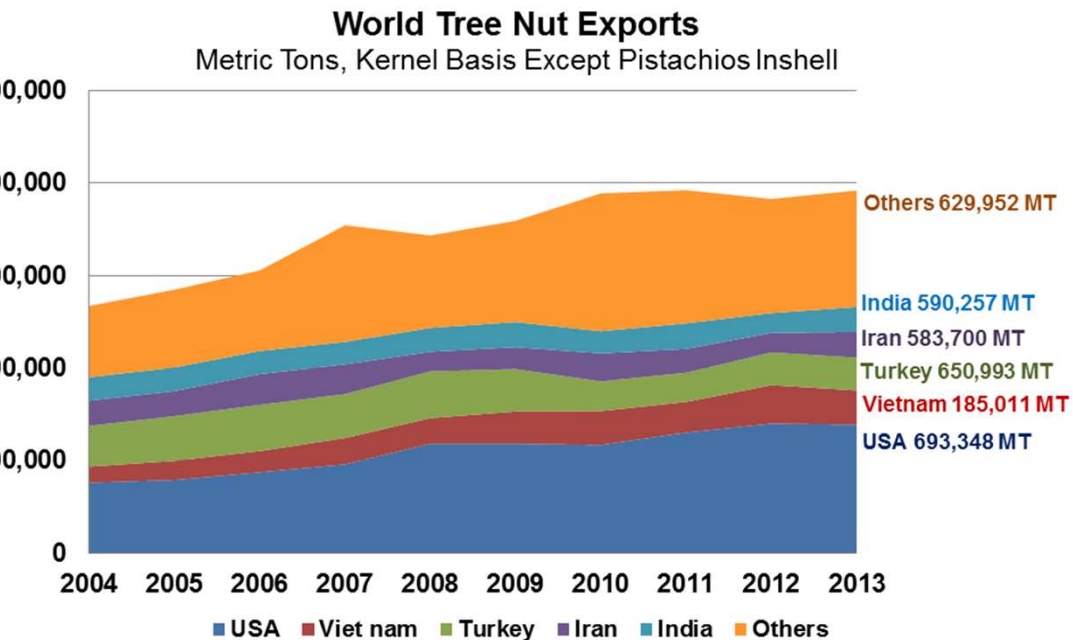


Source: INC and DESA/UNSD, United Nations Comtrade Database.

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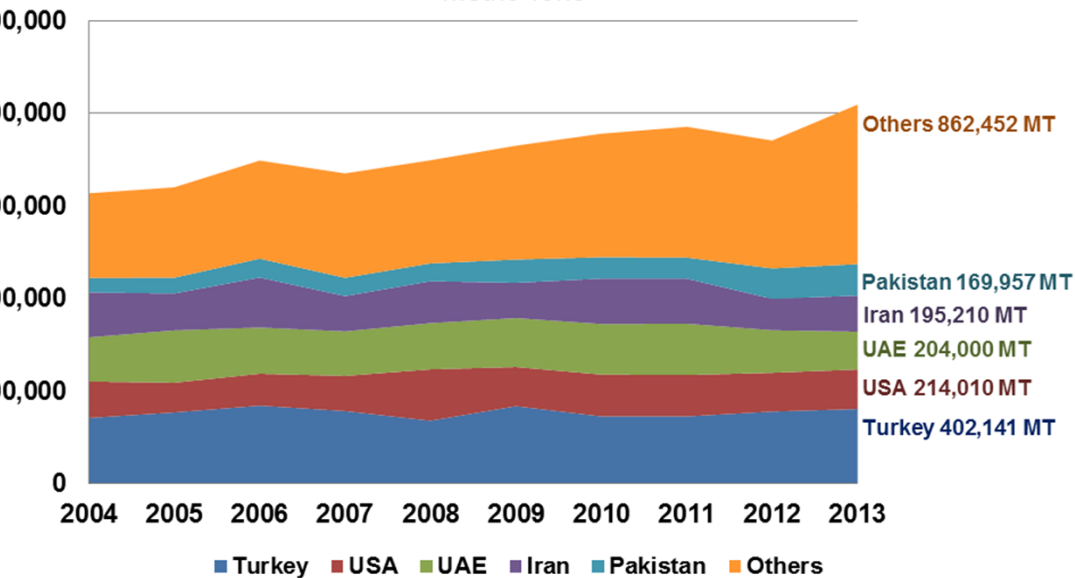
Largest Trading Countries. Tree Nuts



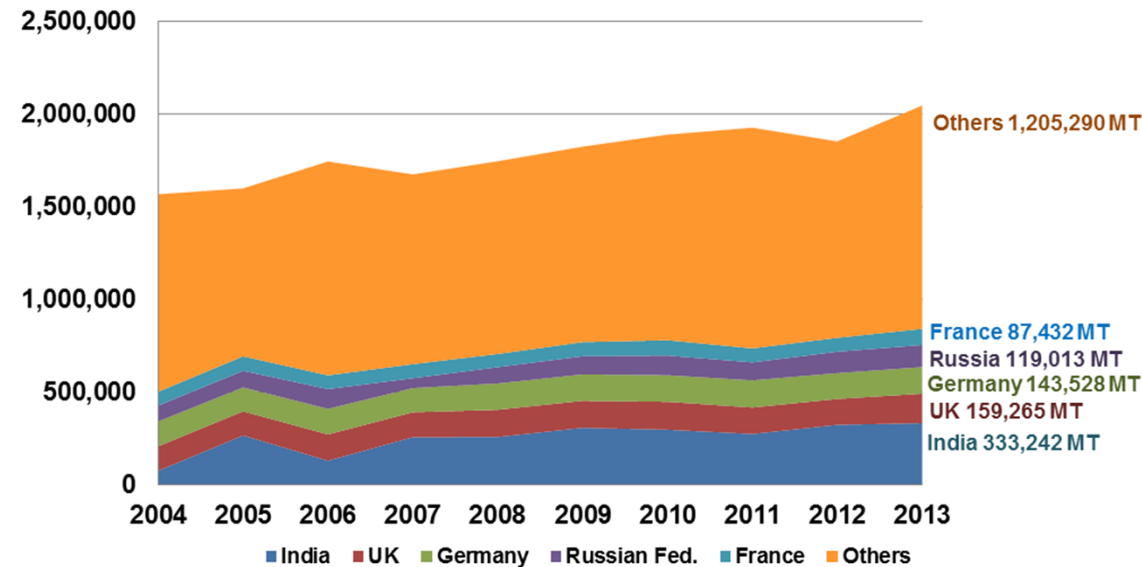
Source: INC and DESA/UNSD, United Nations Comtrade Database.

Largest Trading Countries. Dried Fruits

World Dried Fruit Exports
Metric Tons



World Dried Fruit Imports
Metric Tons



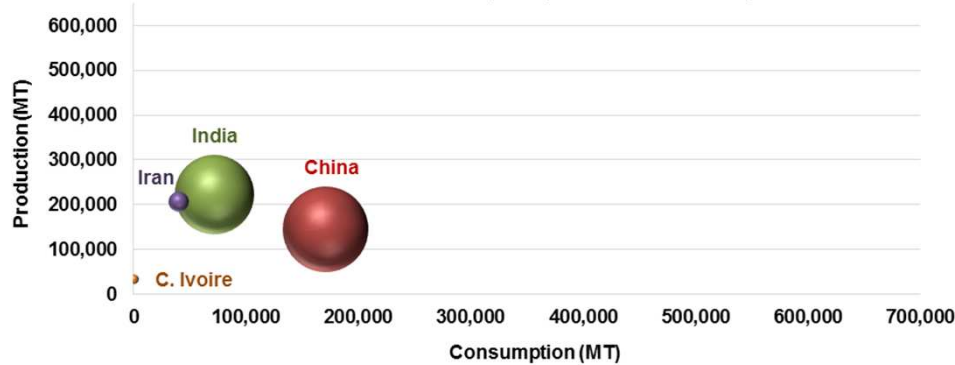
Source: INC and DESA/UNSD, United Nations Comtrade Database.

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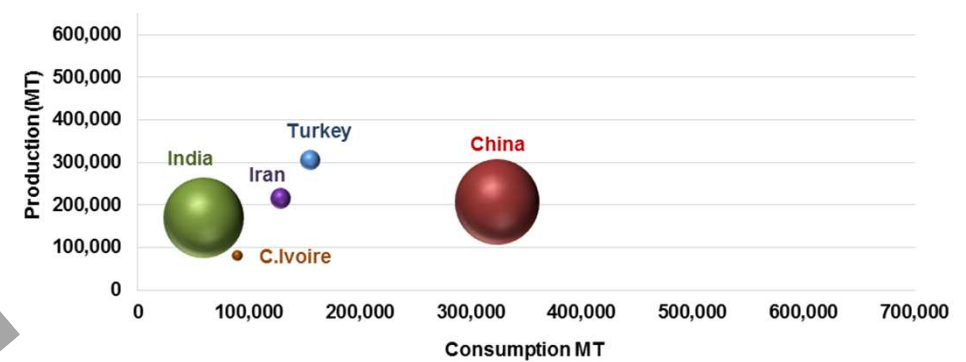
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Forecasts. Countries with the Highest Growth

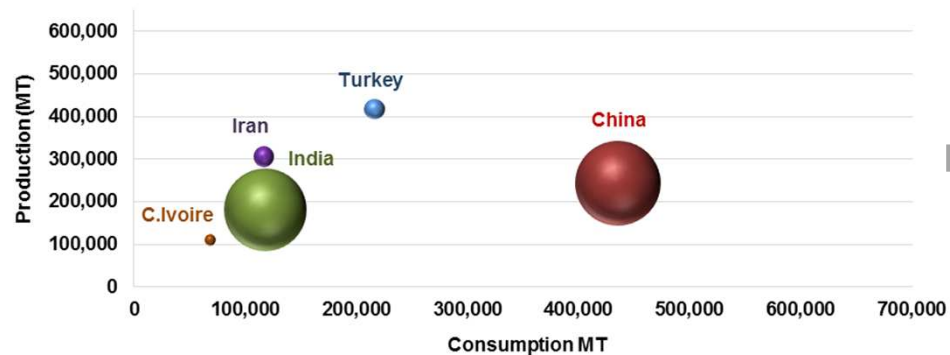
Tree Nut Production and Consumption in 2004
Metric Tons, Kernel Basis (Except Pistachios Inshell)



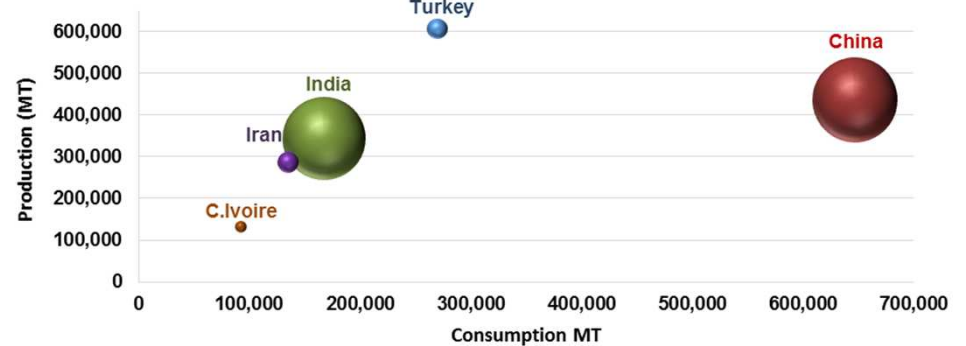
Tree Nut Production and Consumption in 2009
Metric Tons, Kernel Basis (Except Pistachios Inshell)



Tree Nut Production and Consumption in 2014
Metric Tons, Kernel Basis (Except Pistachios Inshell)



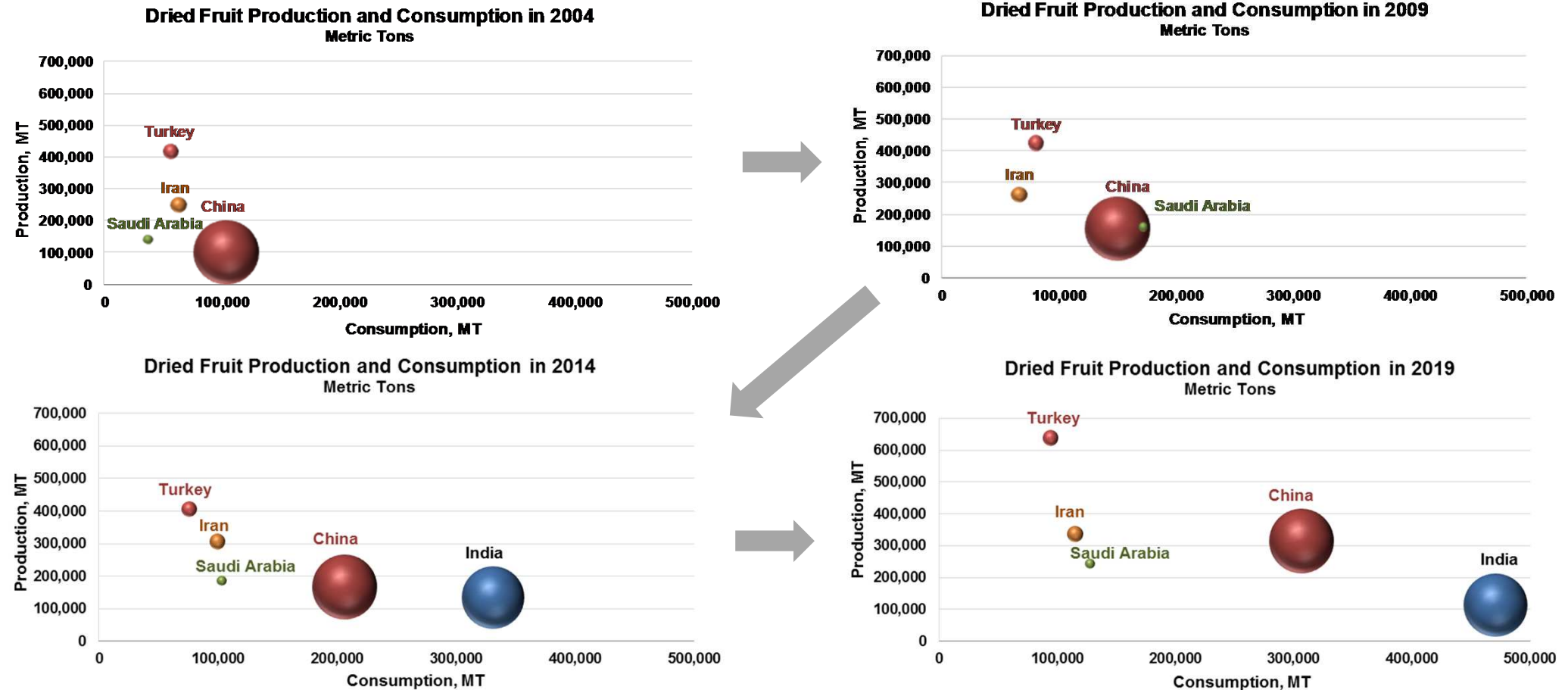
Tree Nut Production and Consumption in 2019
Metric Tons, Kernel Basis (Except Pistachios Inshell)



Source: INC. The size of the spheres represents the population of each country according to The World Bank.

Source: INC.

Forecasts. Countries with the Highest Growth



Source: INC. The size of the spheres represents the population of each country according to The World Bank.

Source: INC.

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Potentialities & Challenges

- Growing world population. Expected to reach 9 billion by 2050 (from 7 billion today).
- Over a BILLION new middle class consumers in emerging markets.
- 500 MILLION in EU; 125 MILLION regular consumers (25%); seldom consumers 40%.
- For an industry like nuts and dried fruits, it represents an enormous potential, as consumers are becoming more health conscious.
- In terms of sustainability, switching to nuts and dried fruits helps the environment.
- Inshell consumption ▼
 - Tradition: Christmas, Ramadan, Chinese New Year...
 - In favor of Kernels ▲

- Key challenges:
 - Climate change
 - Sustainability
 - Food safety
 - Food fraud
 - Trade barriers
 - Health: salt, fats and sugar content.
 - More attention to “ethically-endorsed” production systems.
- Industry collaboration needed: suppliers, retailers, industry, authorities and researchers.
- New varieties.

✓ Thank you



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