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12-14 Feb, 2020
Radisson Blu Hotel
Abidjan, Cote d'Ivoire

THE INDIAN CASHEW MARKET...LESSONS FOR THE WORLD

KALBAVI PRAKASH RAO

KALBAVI CASHEWS

MANGALORE



THE INDIAN CASHEW HISTORY

- 1925- Earliest known cashew processing
- Competitors : only Brazil
- 1923: 45 MT exports,
- 1930: 2300 MT,
- 1939: 13500 MT
- 1940- 1975: imports from East Africa, Exports: 60,000 MT
- India's global share: 75%
- Quilon : (KERELA) cashew capital of the world



The **Rise** (domestic) and **Fall** (exports)



- 1975: Exports -80%, Domestic- 20%
 - 1995: Exports- 60%, Domestic – 40%
 - 2019: Exports- 15%, Domestic – 85%
-
- WHAT BROUGHT ABOUT THIS CHANGE ?



The Great Indian cashew Bazaar !!

**WORLD
CASHEW
CONVENTION
& EXHIBITION**

JNEC-CI
Journées Nationales
des Exportateurs
de Cajou
de Côte d'Ivoire

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TOP 10 CONSUMING COUNTRIES

RANK	COUNTRY	CONSUMPTION(MT)	GLOBAL SHARE
1	INDIA	340171	40%
2	USA	153256	18%
3	GERMANY	39903	5%
4	NETHERLANDS	19236	2.2%
5	UK	18722	2%
6	AUSTRALIA	17471	1.9%
7	CANADA	16267	1.7%
8	FRANCE	9649	1%
9	JAPAN	9040	0.98%
10	SAUDI ARABIA	8854	0.97%

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The Indian Story



COUNTRY	GDP	PER CAPITA INCOME (\$)
USA	21.41 trillion	65111
CHINA	15.54 trillion	10100
JAPAN	5.36 trillion	40846
GERMANY	4.42 trillion	46563
INDIA	3.16 trillion	2171
FRANCE	3.06 trillion	41760
UNITED KINGDOM	3.02 trillion	41030
ITALY	2.26 trillion	32946
BRAZIL	2.26 trillion	8796
CANADA	1.91 trillion	46212



SO WHAT DRIVES CONSUMPTION?

- POPULATION
- SUPPLY
- MARKET PROXIMITY (REACH)
- MARKET SEGMENTS
- SHIFT IN EATING HABBITTS (SWEETS TO DRY FRUITS)
- SERVICING THE MARKET



POPULATION(WORLD-7.7 BLN)

COUNTRY ---POPULATION --PER CAPITA CONSUMPTION

- CHINA- 1.43 BLN (19%)- 0.04G
- INDIA- 1.37 BLN (18%)- 238G
- USA- 0.33 BLN(4%)- 465G
- JAPAN- 0.12 BLN(1.5%)- 0.08G
- EUROPE- 0.52 BLN(6.7%)- 0.28G



SUPPLY



- INDIA WILL PROCESS 2 MLN MT-440,000 MT CK
- RAW SEED PRODUCTION- 5 STATES TO 14 STATES
- MANUFACTURE-5 STATES(Y2K) -20 STATES IN 2020
- AVERAGE SIZE OF UNITS: 3 MT/DAY – 10 MT/DAY
- 60% MECHANISED-10% AUTOMATED-30% MANUAL





MARKET PROXIMITY

- SOUTH PRODUCTION- NORTH CONSUMPTION
- HUB AND SPOKE DISTRIBUTION
- WHOLESALERS,SEMI-WHOLESALERS-RETAILERS
- INTRODUCTION OF VAT & GST- ORIGIN SOURCING
- MANUFACTURE EXPLOSION PAN INDIA-BETTER SERVICING OF MARKETS

MARKET SEGMENTS

- GLOBAL TREND- SNACKING(ROASTED & SALTED)
- CONFECTIONARY & FROZEN DESERT
- INDIAN MARKET:
 1. SNACKING
 2. BAKERY & CONFECTIONARY
 3. SWEETS & SAVOURIES
 4. HORECA
 5. GIFTING
 6. FROZEN DESERT
 7. TEMPLE PRASADAM

IMPACT ON CONSUMPTION

1. SNACKING :95200 MT (28%)
2. BAKERY & CONFECTIONARY :40800 MT (12%)
3. SWEETS & SAVOURIES :68000 MT (20%)
4. HORECA : 61200 MT (18%)
5. GIFTING : 40,800 MT(12%)
6. FROZEN DESERT : 27,200 MT (8%)
7. TEMPLE PRASADAM : 6800 MT (2%)

THE GREAT INDIAN STORY

- CASHEW AS INGRIDIENT

WORLD CASHEW CONVENTION & EXHIBITION

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JNEC-CI
Journées Nationales des Exportateurs de Cajou de Côte d'Ivoire

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MYTH –FINALLY BROKEN

- ZERO CHOLESTROL
- A GOOD SOURCE OF HDL(HEART FRIENDLY)
- DIETARY SUPPLIMENT(SATITY)
- GLYCEMIC INDEX DIET
- HIGH IN VITAMINS AND MINERALS
- CASHEW... A HEALTHY NUT!!
- BIG SHIFT- FROM SWEETS TO DRYFRUITS



MARKET SERVICING..

- 2005 -WHOLESALE TRADITIONAL MARKET
- 2005-2020 : THE RISE OF THE MODERN RETAIL
- TRADITIONAL BUSINESS : 85%
- MODERN RETAIL : 15%
- GROWTH OF MODERN RETAIL : 10-12% YOY
- CONSUMERS ARE SERVICED MUCH BETTER NOW



BACK TO THE FUTURE

- 2022- INDIA WILL PROCESS 20 MLN MT
- 460,000 MT CK- DOMESTIC: 350000 EXPORTS: 110,000 MT
- WILL BE BACK ON THE EXPORT TRACK
- INDIA WILL REMAIN THE MOST VIABLE PROCESSING ORIGIN OF THE WORLD....
- THANKS TO OUR 1.3 BLN CASHEW CONNOISSEURS