



**WCC – JNEC 2022**

**Cashew Processing in Africa: How to Scale-up Sustainably?**

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ofi : Olam Food Ingredients**

# Current Processing Volumes in Africa

Year	2019	2020	2021
<b>Country</b>			
<b>Nigeria</b>	<b>25-30</b>	<b>25-30</b>	<b>25-30</b>
<b>Benin</b>	<b>15-20</b>	<b>15-20</b>	<b>15-20</b>
<b>Ghana</b>	<b>10-15</b>	<b>10-15</b>	<b>10-15</b>
<b>Burkina Faso</b>	<b>5-10</b>	<b>5-10</b>	<b>15-20</b>
<b>Côte d'Ivoire</b>	<b>60-70</b>	<b>70-80</b>	<b>120-130</b>
<b>Mozambique</b>	<b>50-55</b>	<b>25-30</b>	<b>25-30</b>
<b>Tanzania</b>	<b>10-15</b>	<b>10-15</b>	<b>10-15</b>
<b>Kenya</b>	<b>10-10</b>	<b>10-10</b>	<b>10-10</b>
<b>Others</b>	<b>10-15</b>	<b>10-15</b>	<b>10-15</b>
<b>TOTAL</b>	<b>200-220</b>	<b>200-220</b>	<b>250-275</b>

*(volume in '000 MT)*

- Increase in Africa processing led for West Africa, specially CIV
- 2020 expansion plans got impacted by COVID related slowdown and constraints
- Greater supporter from government and more investors coming in from Asia
- 2025 numbers can be close to 500k MT for Africa!!

*Source: Various surveys and official sources  
Does not take into account local consumption*

# Support to Processors



Country	RCN Export Levy (\$/MT RCN eq.)	Remarks	Kernel Export Benefit (\$/MT RCN eq.)	Total Benefit to local processor (\$/MT RCN eq.)
Benin	92	Annual Declaration		92
Guinea Bissau	181	Annual Declaration		181
Burkina Faso	46	Annual Declaration		46
CIV RCN	192	Annual Declaration		192
CIV Full Processing	192	Annual Declaration	154	346
CIV Partial Processing	192	Annual Declaration	74	266
Mozambique	216	18% of FOB		216
Tanzania	193	15% of FOB		193
Ghana	10	1% of FOB		10

*Source: Various surveys and official sources*

*Exchange rates during the season may change*



# African Processor vis-à-vis Indian / Vietnamese Processor



## Sales Realization

- Shell Sales
- Reject / lower grades
- Local markets

## Cost

- Labor wages an efficiency
- Spares and consumables
- Lead time and safety stock requirement

## Financing and Market Risks

- Huge financing requirement
- Risks of market movement
- Space / Warehouse area requirements

## Structural Challenges

- Raw nut / kernel import opportunities
- Lack of ecosystem – slowly being built
- Long term projections are hard to make



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Journées Nationales des Exportateurs de Cajou de Côte d'Ivoire

16-18 Feb. 2022  
Radisson Blu Hotel  
Abidjan, Côte d'Ivoire



Merci!  
Thank you!