

Les Acteurs du Secteur du Cajou au Mali
en collaboration avec Alliance pour le Cajou Africain (ACA)
organisent la deuxième édition du :

FORUM sur le CAJOU Sahélien

FOOCAS

Azalai Hotel Bamako ex Salam
Bamako, Mali, 5-7 août, 2019

THÈME Amélioration de la compétitivité de la chaîne de valeur anacarde dans les pays sahéliens



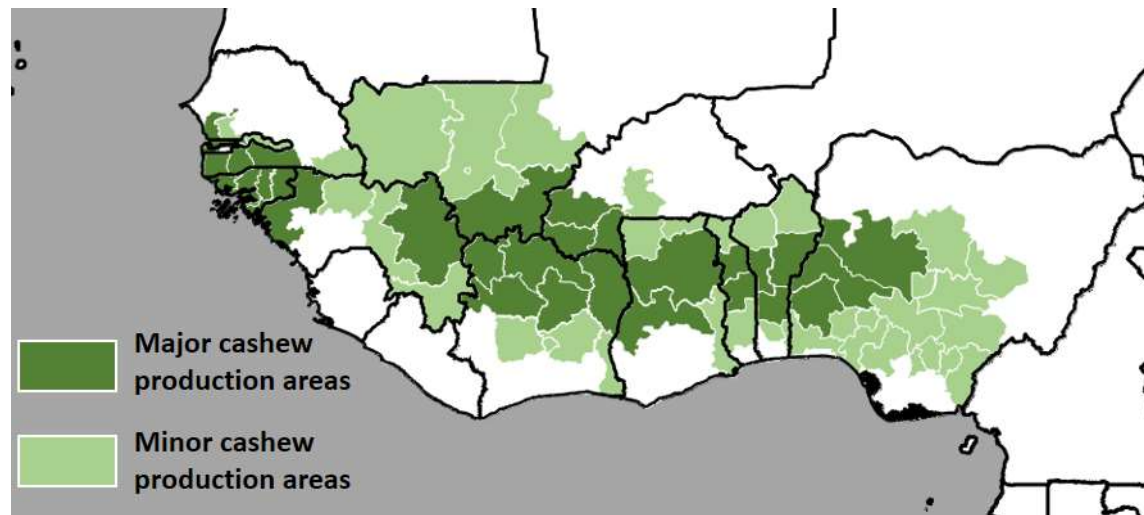



Overview of Cashew Production Trends and Developments in the Raw Cashew Nut Market in the Sub-region and Outlook for 2019/2020



Sansan HIEN, Analyste de Marché, Service n'kalô – 5 août 2019 – Bamako – www.nkalo.com

How do you assess cashew nut production in West Africa ?



Issue: lots of data available in West Africa but updates are hard to find and they are also not reliable

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We begin with data from the destination countries

- India, Vietnam, Brazil, China, Indonesia: for raw cashew nuts
- *The same countries + USA, European Union, Canada, Russia, Israel, Lebanon*: for cashew kernels



Example: Statistics for the 2018 Crop Season

RCN/Noix Brute	Mars 2018->Février 2019				
	Vietnam	Inde	Brésil	Autres	Total RCN
Côte d'Ivoire	420 000	220 000	6 500	6 500	653 000
Ghana	150 000	99 000		41 000	290 000
Nigeria	135 000	64 000		6 000	205 000
Bénin	35 000	140 000		2 000	177 000
Guinea-Bissau	65 000	66 000		0	131 000
Burkina Faso	24 000	37 000		30 000	91 000
Guinea	50 000	27 000			77 000
Togo	7 500	24 000		2 500	34 000
Gambia	1 000	18 000			19 000
Senegal	15 000	14 000			29 000
Mali	1 000	2 000		2 000	5 000
Sierra Leone		50			50
Cameroun		17			17
Total	903 500	711 067	6 500	90 000	1 711 067

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Example: Statistics for the 2018 Crop Season

Kernel/Amande	Avril 2018-> Mars 2019								
	Vietnam	Inde	UE28	USA	Canada	Brésil	Autres	Total	Total *4,8
Côte d'Ivoire	4 565	543	1 591	2 370	103		278	9 450	45 360
Ghana			1 007	507	283	241	39	2 077	9 970
Nigeria		95	221	566			46	928	4 454
Bénin		128	249	1 399	88		14	1 878	9 014
Guinea-Bissau		111	300	48		191	80	730	3 504
Burkina Faso			1 245	225			70	1 540	7 392
Guinea			53				12	65	312
Togo			384	134			7	525	2 520
Gambia							0	0	0
Senegal			18				0	18	86
Mali			10				0	10	48
Sierra Leone							0	0	0
Cameroun							0	0	0
Total	4 565	877	5 078	5 249	474	432	546	17 221	82 661

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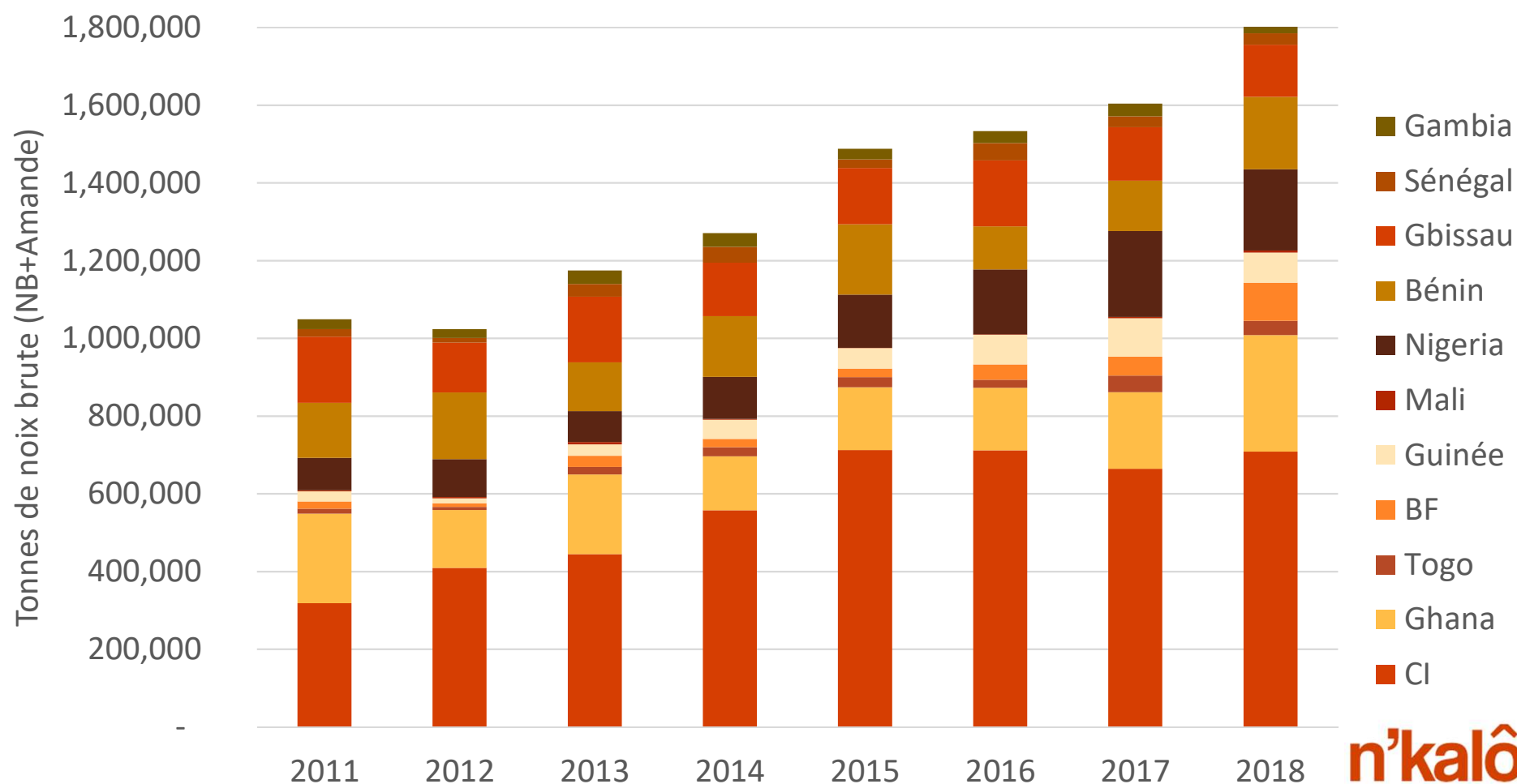
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Total RCN+kernel	
Côte d'Ivoire	698 360
Ghana	299 970
Nigeria	209 454
Bénin	186 014
Guinea-Bissau	134 504
Burkina Faso	98 392
Guinea	77 312
Togo	36 520
Gambia	19 000
Senegal	29 086
Mali	5 048
Sierra Leone	50
Cameroun	17
Total	1 793 728

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Exports originating from West Africa:

We have the exports per country of origin but not the production

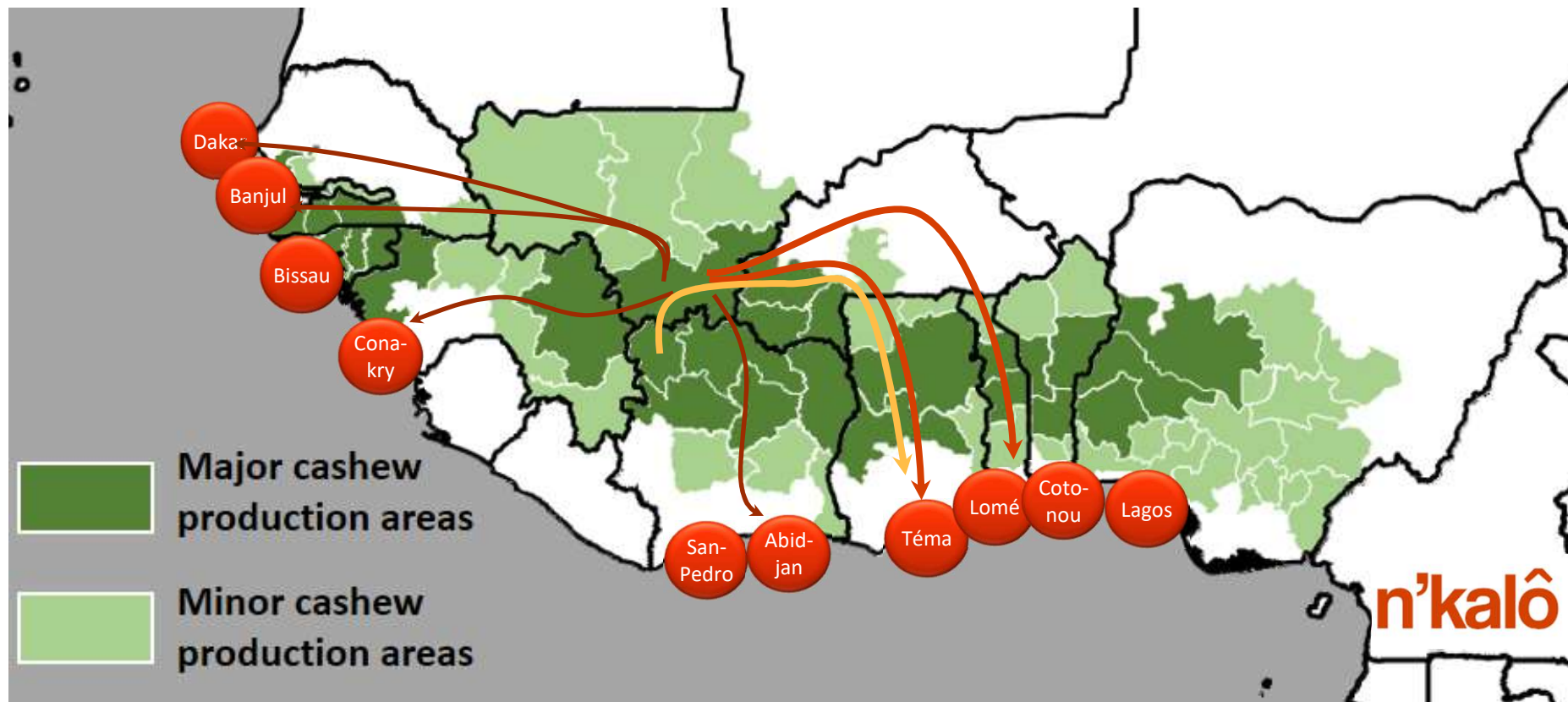


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A F R I C A N C A S H E W A L L I A N C E

Growing the African Cashew Industry!

Cashew Production Areas in West Africa



Estimates of Informal Crop Flows Per Year

- Informal flows must be assessed every year in order to approximate the final production for each country

n'kalô	2011	2012	2013	2014	2015	2016	2017	2018
CI to Ghana	165 000	45 000	105 000	20 000	10 000	25 000	80 000	130 000
BF to Togo	11 000	5 000	15 000	15 000	16 000	10 000	30 000	23 000
Mali to Gambia	20 000	0	25 000	10 000		5 000		
Mali to Bénin	0	20 000			10 000			
BF to Bénin	30 000	45 000		10 000	35 000			
Mali to BF								15 000
Mali to Ghana	0	5 000	5 000	25 000	25 000	20 000	35 000	25 000
BF to Ghana	0	0	17 500	22 500	0	27 500		10 000
Mali to Guinée					5 000	15 000		0
Guinée to Ghana		32 500	7 500		45 000	5 000		0
Nigeria to Bénin	40 000	30 000	50 000	45 000	45 000	15 000		40 000
Gbissau to Gambia	0	10 000	2 500	12 500	15 000	12 500	15 000	12 500
Gbissau to Sénégal			10 000	15 000		25 000		
Gbissau to Guinée		15 000		10 000	50 000	10 000	45 000	20 000
Sénégal to Gambia	0	5 000	0	5 000	5 000	7 500	9 000	

Finally, production estimates per country follow a relatively regular growth pattern

(with the exception of countries in red)

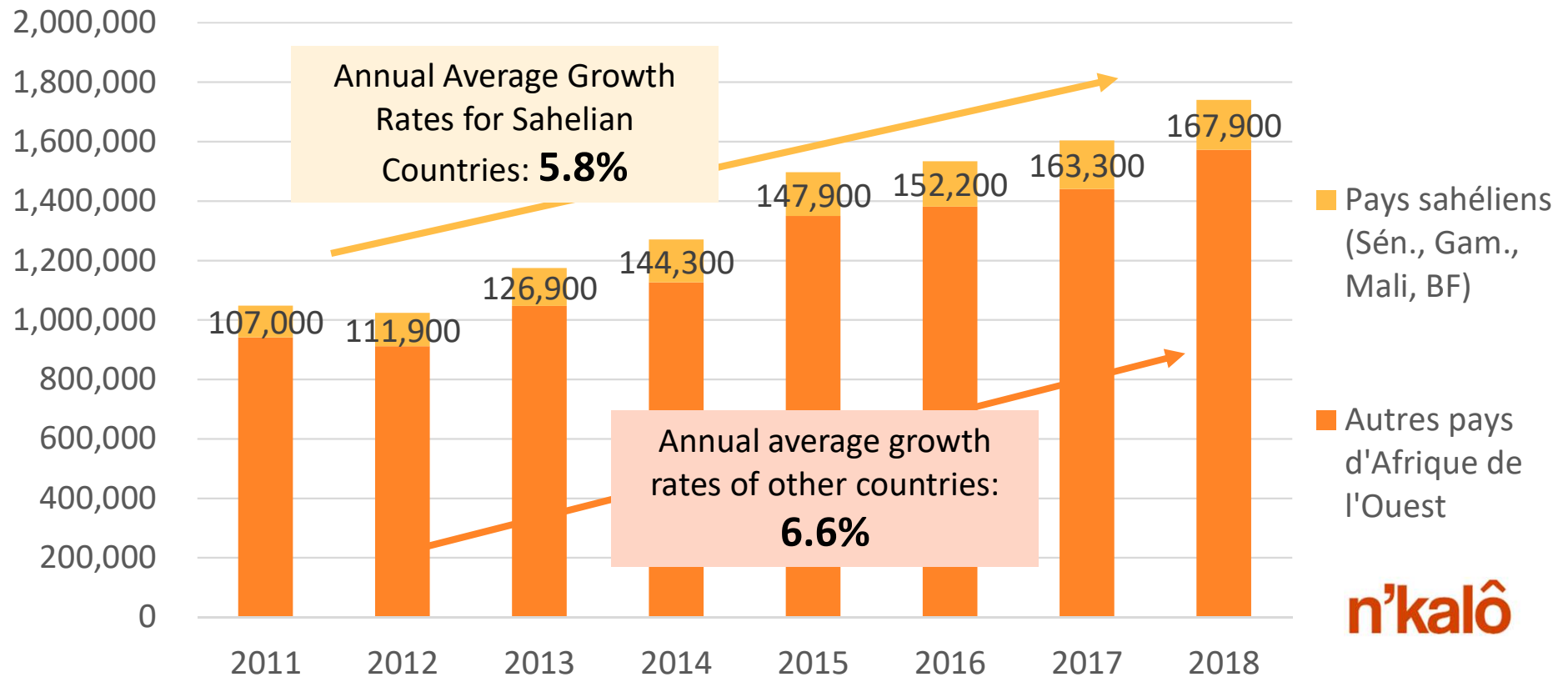
Of course, there is a margin of error but the outcome is now quite close to the actual production and its trend over the long term ...

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Production estimée	2011	2012	2013	2014	2015	2016	2017	2018
CI	483 000	454 000	549 700	577 300	722 400	736 900	744 000	840 000
Ghana	64 900	66 600	69 700	71 500	81 200	83 000	82 500	91 200
Togo	1 800	2 900	4 500	8 300	10 300	10 900	12 200	13 500
BF	60 100	59 200	61 100	68 600	73 400	76 900	79 200	88 300
Guinée	26 100	30 000	37 200	39 700	42 600	55 900	53 700	57 200
Mali	22 300	28 200	35 700	36 700	40 400	41 800	38 400	44 000
Nigeria	123 400	127 800	129 400	153 100	181 800	181 900	221 000	257 000
Bénin	71 500	76 500	75 600	101 700	101 300	95 700	129 400	146 500
Gbissau	170 400	153 400	181 200	174 700	209 900	216 900	197 700	167 100
Sénégal	19 400	17 000	23 000	30 900	27 100	27 800	36 900	28 900
Gambia	5 200	7 500	7 100	8 100	7 000	5 700	8 800	6 700
Total	1 048 100	1 023 300	1 174 300	1 270 700	1 497 300	1 533 300	1 603 900	1 740 300

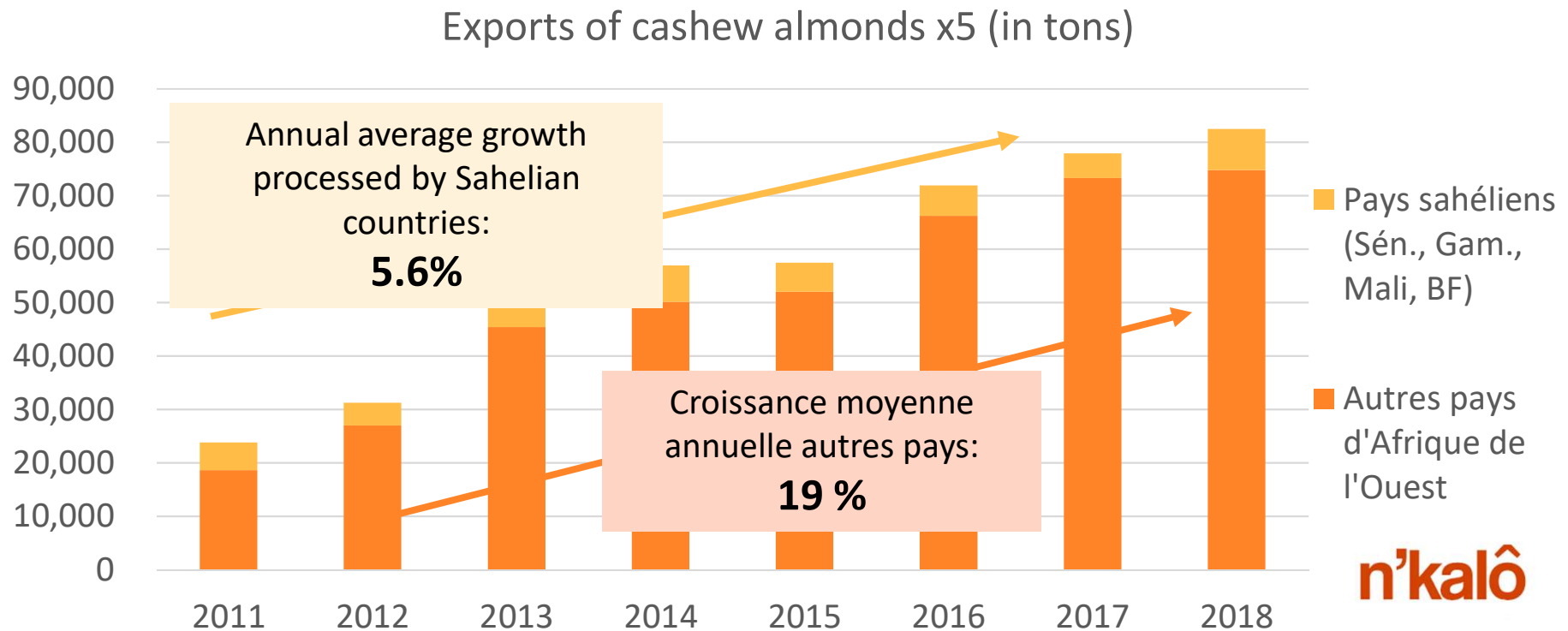
The Sahelian production follows a relatively comparable growth to that of other countries

Origin of Cashew Supply Exported to the International Market
(in tons of Raw Cashew - Source: customs statistics and estimates . n'kalô service)



But the Sahelian countries are lagging behind in terms of local processing

- Only Burkina Faso has developed a processing industry of a considerable size...



Key Issue: a promotion and protection policy at the ECOWAS level

- Since the Sahelian countries such as Mali and Burkina have no control over the ports, they have difficulties in establishing a structure to enforce levies to protect and promote their local industry;
- They must support the establishment of a common tax system across the entire ECOWAS sub-region as a means of supporting and sustaining their local processing
- This will also help reduce smuggling to countries which do not have a system of levies in place (Ghana, Gambia).

Balance Sheet for 2019 – Outlook for 2020

- A difficult season as a result of the huge carryover stocks from 2018 to 2019
- Low prices during the season: FCFA 400 to 500/kg in February/March and from FCFA 100 to 300/kg in May/June



But a good demand (consumption boosted by low prices), which ensured that:

- Prices increased slightly at the end of the crop season
- Sales of more than 95% were made of the 2019 production and of the 2018 stocks
- Local processing units worked at full capacity



=> 2020: good demand and less stocks => outlook of a crop season far better for producers, but one must not expect prices to go above FCFA 600/kg, it must be understood that prices beyond CFAF 600/kg are exceptional!



In order to find out about market trends and anticipate the risks related to the upward or downward movement of prices, n'kalô is at your assistance



- **Newsletter** on the market with weekly updates during the crop season sent by email: 60 000 FCFA/year
- In **Mali**: Sènèkèla – agro-policy advisers are available by calling **37333** through Orange Mali network (normal call rate chargeable)
- In **Burkina**: our messages are available in the following languages: Moré, Dioula and in French by dialing short code **321** using the Orange Burkina Faso network
- In **Côte d'Ivoire**: Send “Agri” by SMS to short code **7818** or call 7818 to subscribe to our daily information outlet on Orange Côte d'Ivoire (106 francs/month).
- Services will soon be available on your mobile networks in other countries in the sub-region!

Thank you for your attention

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