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

CASHEW KERNEL MARKET EVOLUTION & REQUIREMENTS OF CLIENTS AND CONSUMERS

PRESENTED BY : Daouda DIOMANDE;
Sustainable Procurement Head & Corp. Responsibility and
Sustainability Coordinator;
Olam Ivoire SA; Cashew

AGENDA

SUPPLY ||

- Evolution of world cashew production
- Regions of origin and export

DEMAND ||

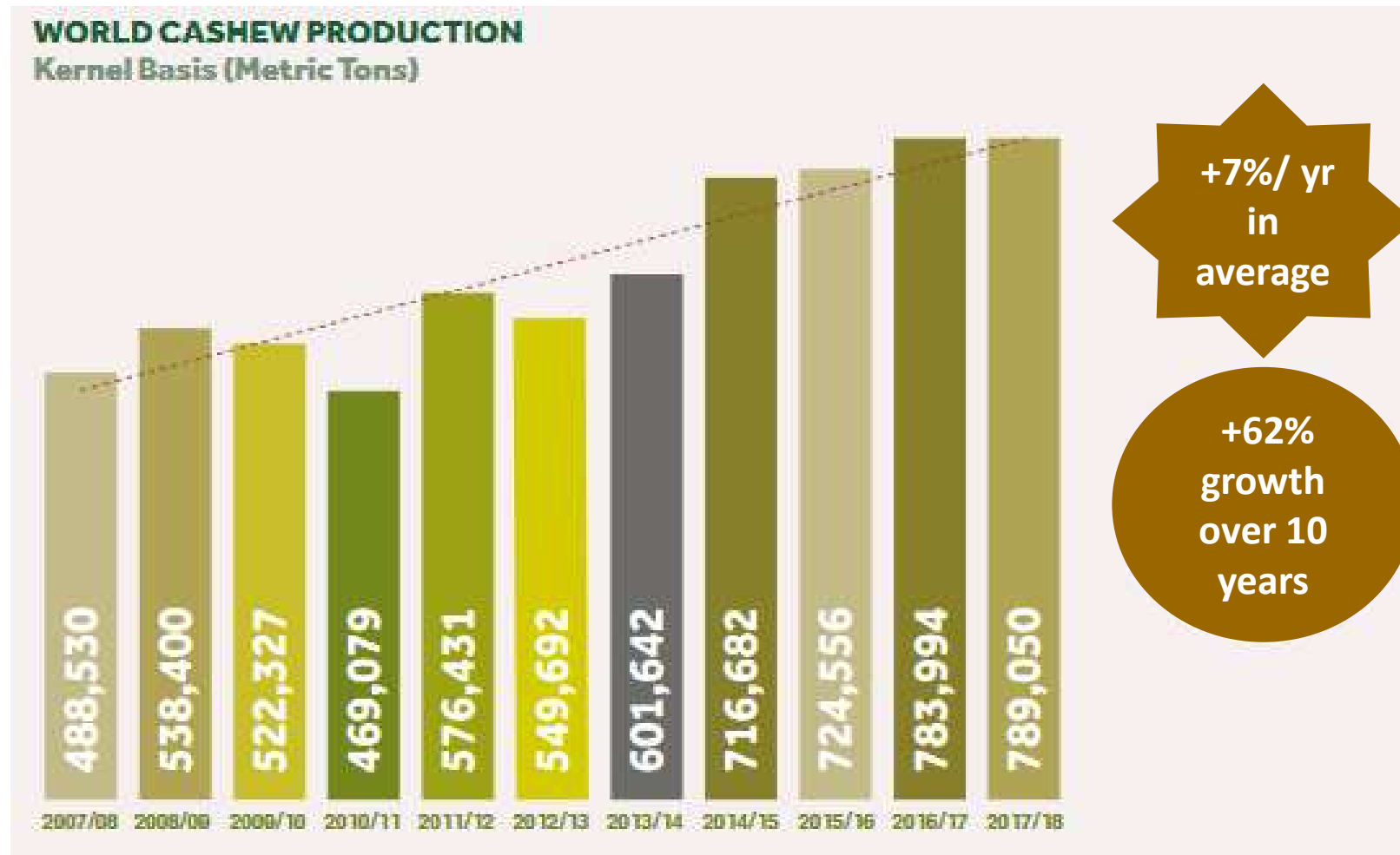
- Repartition and evolution of world demand in kernel by region

REQUIREMENTS OF CLIENTS AND CONSUMERS ||

- Quality norms & food safety
- Traceability and certification norms
 - Processors traceability
 - Global traceability
 - Certification norms
- Sustainability : ‘Good for him’ , ‘good for planet’, ‘good for farmers’.
- “AtSource, Olam’s sustainable sourcing package in the B2B marketplace”

SUPPLY | Evolution of world cashew production

Kernel Basis (Mt)



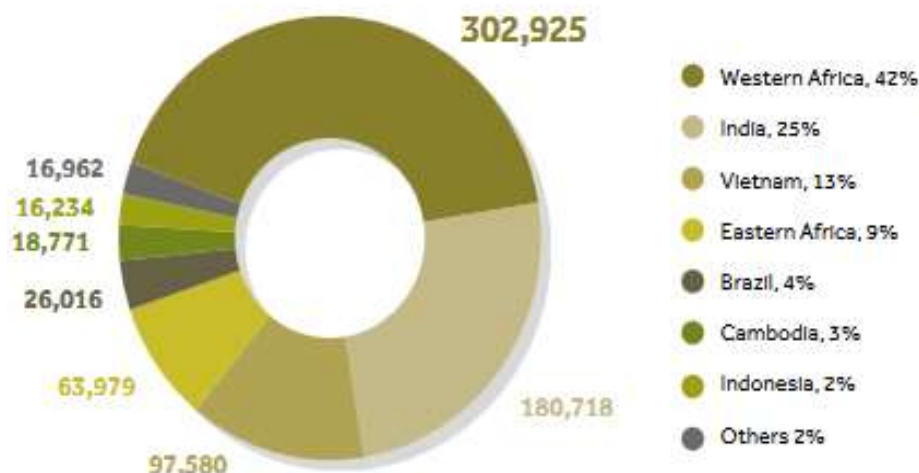
**Source: International Nuts & Dried fruits 2017-2018*

SUPPLY | | Regions of origin and export

Kernel basis (Mt)

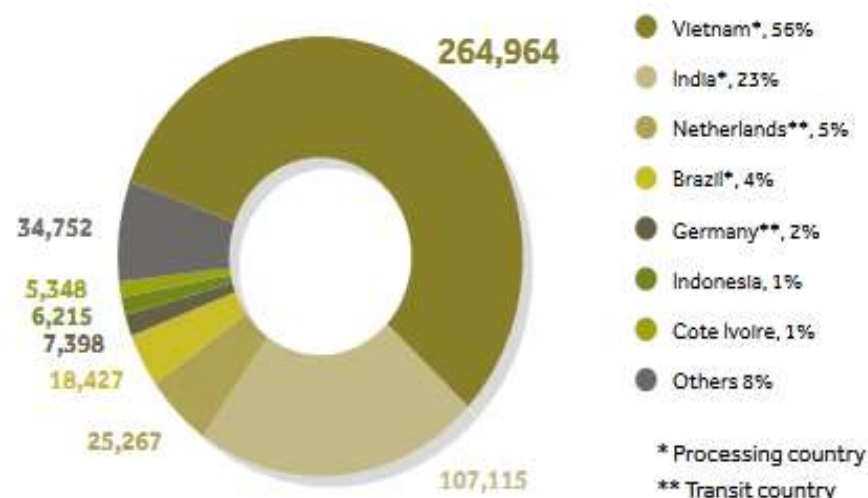
**Source: International Nuts & Dried fruits 2017-2018*

5-YEAR AVERAGE CASHEW PRODUCTION
Kernel Basis (Metric Tons)



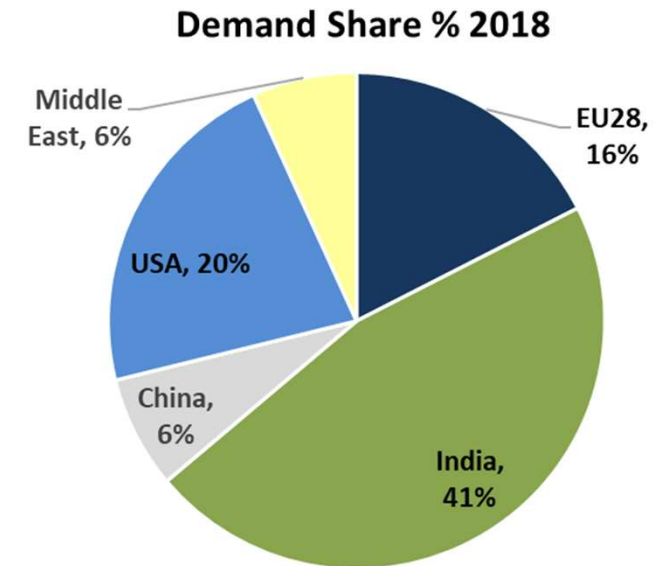
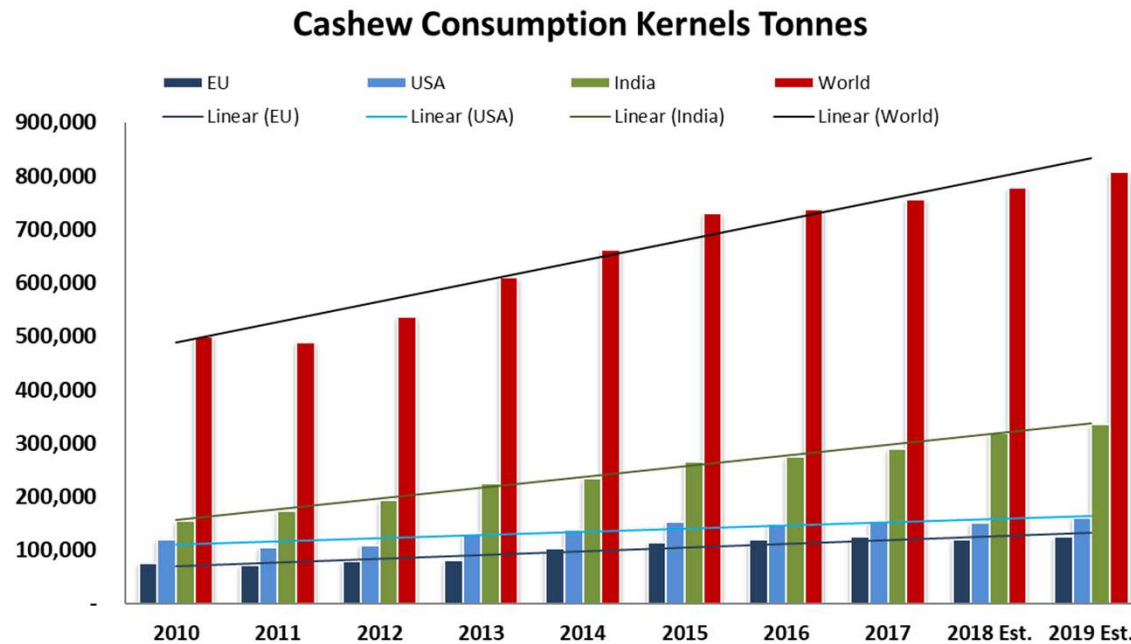
Western Africa led the production, amounting to 43% of the world raw cashew nuts production

5-YEAR AVERAGE CASHEW EXPORTS
Shelled (Metric Tons)



Cashews were mainly exported by Vietnam and India, which added up to 73% the world offer in cashew kernels

THE DEMAND | | Division and evolution of world demand of kernels by region



**Source: ComCashew 2019*

- In 2018, demand stagnated or fell everywhere except in India, but this was enough to keep the overall growth trend
- India remains the largest consumer, followed by the USA and Europe28
- China and the Middle East appear as markets that could be important for the future

THE DEMAND | | Division and evolution of world demand of kernels by region

ESTIMATED WORLD CASHEW CONSUMPTION (Kernel Basis)															
COUNTRY	2012			2013			2014			2015			2016		
	Consumption (MT)	Cons. per capita (kg/year) ¹	Estimated Cons. per capita (kg/year) ²	Consumption (MT)	Cons. per capita (kg/year) ¹	Estimated Cons. per capita (kg/year) ²	Consumption (MT)	Cons. per capita (kg/year) ¹	Estimated Cons. per capita (kg/year) ²	Consumption (MT)	Cons. per capita (kg/year) ¹	Estimated Cons. per capita (kg/year) ²	Consumption (MT)	Cons. per capita (kg/year) ¹	Estimated Cons. per capita (kg/year) ²
India	289,677	0.245	0.500	230,278	0.182	0.360	224,384	0.177	0.360	257,190	0.203	0.406	301,719	0.228	0.456
USA	109,448	0.354	1.073	130,477	0.422	1.279	128,342	0.402	1.219	141,119	0.439	1.329	143,256	0.445	1.347
Germany	26,177	0.320	1.281	25,591	0.313	1.252	23,016	0.283	1.133	23,810	0.295	1.180	35,930	0.439	1.097
Netherlands	12,366	0.744	0.930	23,005	1.385	1.731	20,796	1.240	1.550	23,536	1.391	1.738	17,236	1.015	1.268
UK	12,381	0.199	0.603	9,636	0.155	0.469	16,052	0.251	0.759	19,854	0.307	0.930	16,772	0.255	0.773
Australia	15,491	0.695	1.389	15,763	0.707	1.414	16,572	0.715	1.430	15,893	0.663	1.326	16,471	0.683	1.365
Canada	11,808	0.346	0.692	11,958	0.350	0.701	12,156	0.344	0.689	11,812	0.329	0.657	14,267	0.393	0.786
France	8,416	0.134	0.535	8,698	0.138	0.553	10,027	0.151	0.606	10,418	0.162	0.647	8,649	0.134	0.535
Japan	7,580	0.059	0.108	8,146	0.064	0.116	11,523	0.091	0.166	11,235	0.089	0.161	8,040	0.063	0.114
Saudi Arabia	6,203	0.225	0.682	5,310	0.193	0.584	7,977	0.272	0.823	8,541	0.271	0.821	7,854	0.243	0.737
Italy	5,410	0.089	0.596	4,744	0.078	0.523	7,000	0.117	0.783	6,745	0.113	0.752	7,060	0.119	0.792
Thailand	5,920	0.088	0.131	6,010	0.089	0.133	8,164	0.121	0.181	8,290	0.122	0.182	6,213	0.090	0.129
Russian Fed.	10,094	0.071	0.284	10,060	0.071	0.283	12,161	0.086	0.345	3,604	0.025	0.100	5,830	0.040	0.162
Israel	4,041	0.530	1.060	2,840	0.373	0.745	4,490	0.561	1.121	4,349	0.539	1.079	4,001	0.488	0.977
China	51,043	0.038	0.116	51,350	0.038	0.116	52,159	0.038	0.115	49,925	0.036	0.109	3,998	0.003	0.008
Korea Rep.	1,150	0.023	0.071	2,676	0.054	0.164	3,920	0.078	0.236	3,085	0.061	0.186	3,964	0.078	0.237
Spain	4,383	0.095	0.381	4,935	0.107	0.428	4,511	0.096	0.382	5,303	0.115	0.460	3,498	0.075	0.302
Malaysia	2,120	0.075	0.150	1,323	0.047	0.094	2,013	0.067	0.133	2,297	0.076	0.151	2,971	0.095	0.191
New Zealand	2,389	0.547	1.094	2,651	0.607	1.214	2,884	0.635	1.270	3,006	0.664	1.328	2,811	0.603	1.206
Sweden	1,301	0.139	0.555	2,213	0.236	0.944	2,090	0.217	0.869	2,080	0.213	0.851	2,739	0.278	1.114
WORLD TOTAL	599,034	0.087		601,642	0.087		716,682	0.100		724,556	0.099		792,323	0.106	

*Source: International Nuts & Dried fruits 2017-2018

REQUIREMENTS OF CLIENTS AND CONSUMERS || Quality Norms & Food Safety

The **norm CEE-ONU DDP-17** concerning commercialization and Commercial Quality Control of Cashew Nuts, in its 2013 edition defines:

- Minimal characteristics
- Water content
- Classifications: Extra white, Cat I roussie, Cat II roussie
- Grades of wholes and pieces kernels
- Tolerances allowed in quality and size
- Presentation
- Marking

Kernels beeing sold principally in Europe and North America, depending on destination country, below points are required:

- Microbiological analysis
- Certificates: Kosher, HACCP, ISO, BRC

International norms



Food safety



REQUIREMENTS OF CLIENTS AND CONSUMERS | | Traceability and certification norms

Processor traceability

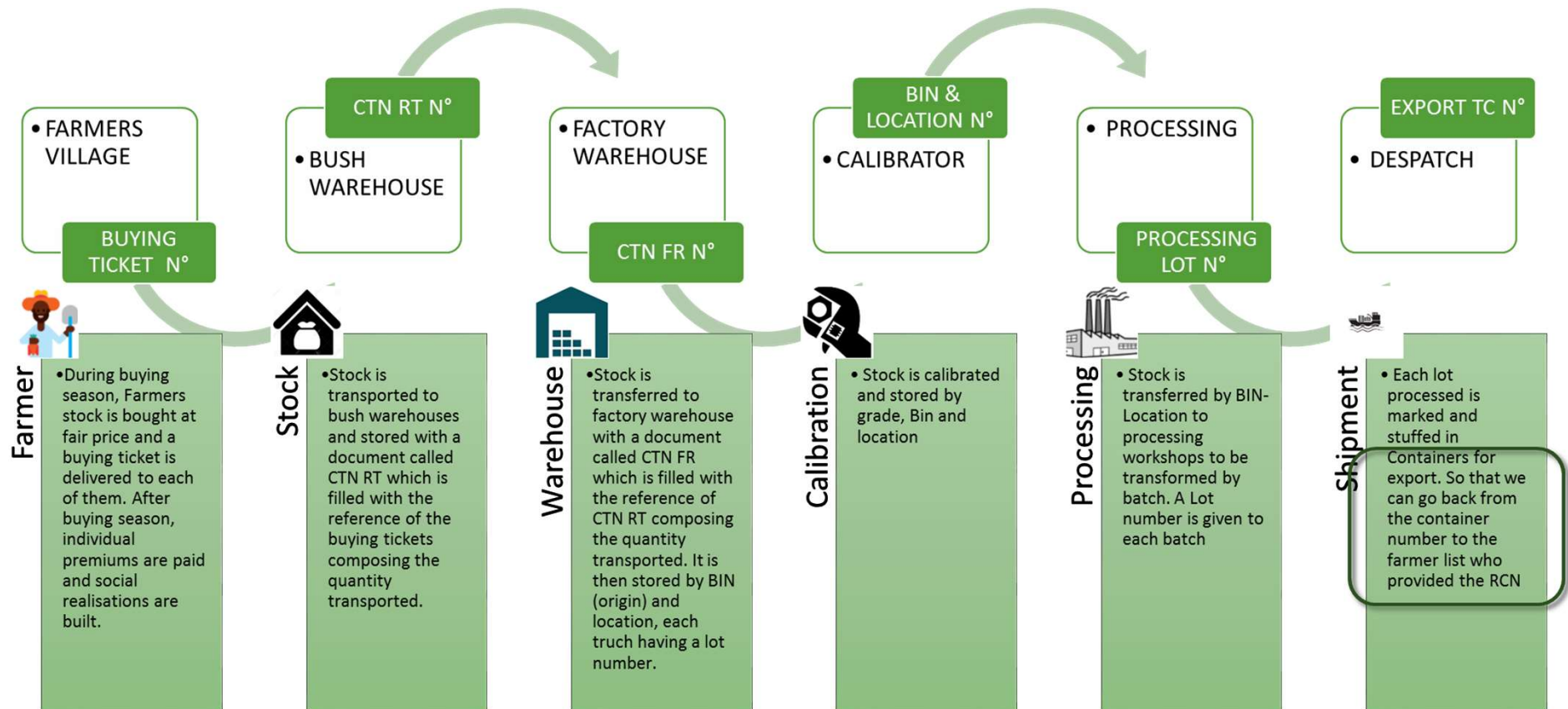
Today's consumers are very interested by the traceability of what they eat. The occidental consumer wants to know from where his food comes from and who produced it.

In Ivory Coast, a « guide for Good Traceability Practices » was elaborated, in relation with the support from Canada Govt and World Bank Group, for strengthening the competitiveness of small and medium-sized enterprises (SMEs) in the cashew processing sector.

The aim of the guide is to enable processors to retrieve all data and information on incoming and outgoing products at different stages of receiving and processing cashew nuts.

REQUIREMENTS OF CLIENTS AND CONSUMERS | Traceability and certification norms

Global traceability



Olam Bouaké factory example: « We can go back from the container number to the farmer list who provided the RCN »

REQUIREMENTS OF CLIENTS AND CONSUMERS | Traceability and certification norms

Certification norms

Certification brings a certain competitive advantage on the market. For cashew nuts, the most common are:

- Organic certification: EU & USDA_ health & well-being



- Fairtrade certification: responsibility / fair business



REQUIREMENTS OF CLIENTS AND CONSUMERS || Sustainability

Apart from framed certificates that we mentioned earlier, the consumer is aware of his/her impact on the planet and the others.

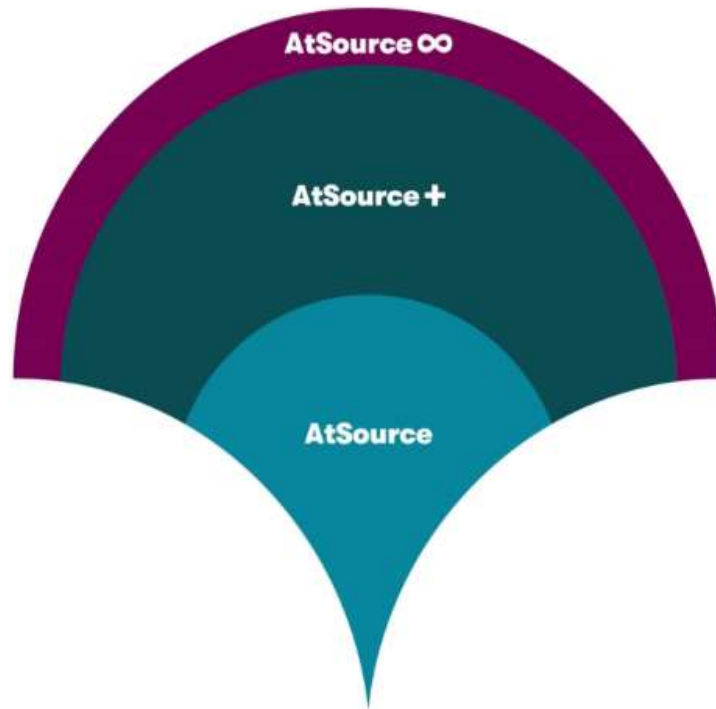
He/she wants to consume responsibly: goods that are
“right for him/her”,
“right for the planet”,
“right for the farmers”.

African processors have the advantage of being located at the source of cashew nuts and can develop sustainability programs with farmers and their communities to add value to the cashew kernel offer ex -Africa.

REQUIREMENTS OF CLIENTS AND CONSUMERS || Sustainability

In our ambition of reinventing global agriculture and food systems, Olam has developed a special offer for satisfying today's consumers demand: **"AtSource**, Olam's sustainable sourcing package in the B2B marketplace"

Our joint Sustainability ambition



- **Infinity:** Collaboration with customers to achieve **transformational net-positive impact at community or landscape level**
- **Plus:** **Traceable and sustainable supply chains** with on the ground initiatives and granular reporting, 3rd party verified
- **Entry-Tier:** **Transparency and reassurance** of Olam's efforts to offer **responsible supply**

THANKS