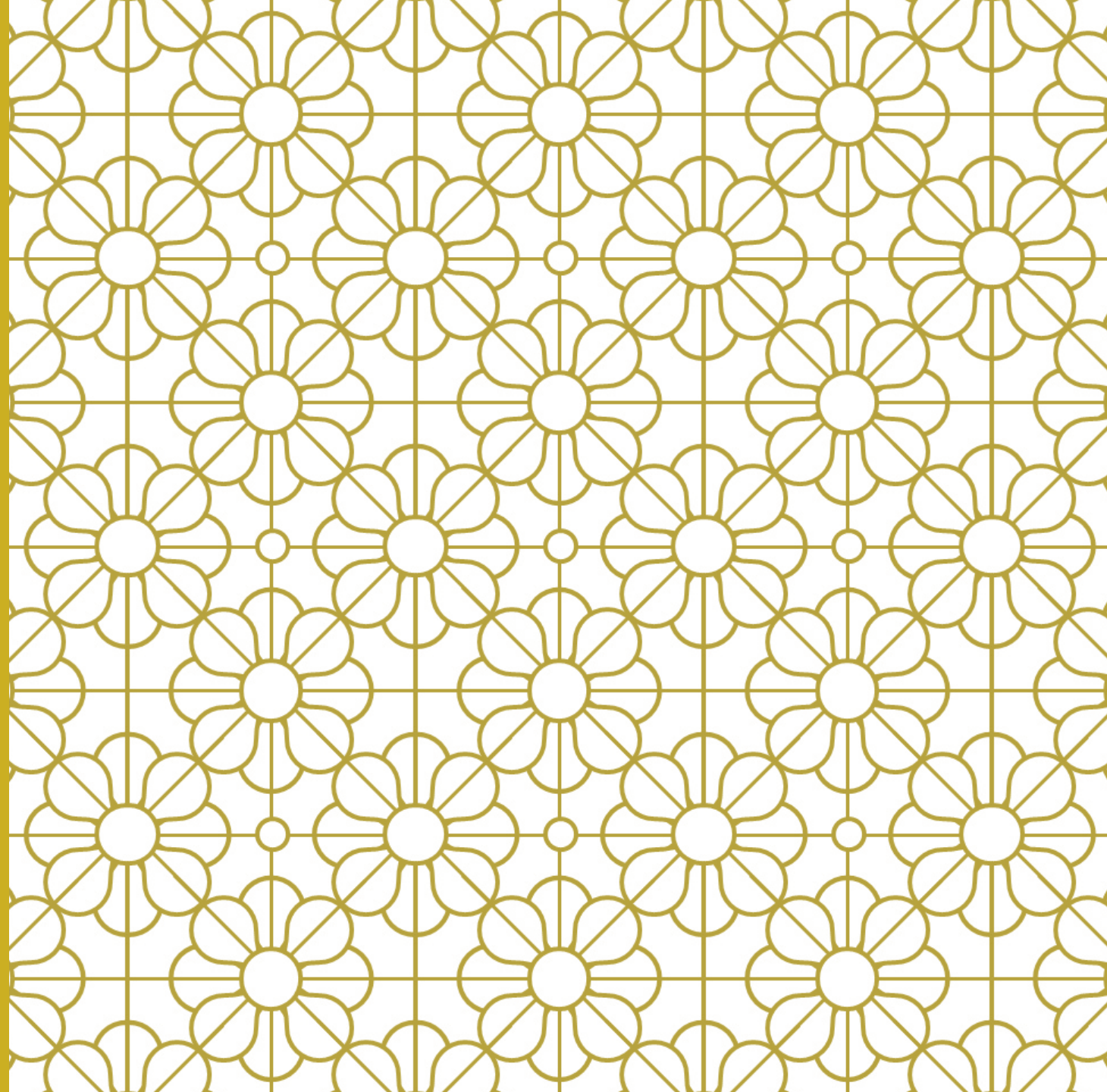


# VALUE-ADDITION OPPORTUNITIES IN CASHEWS

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# PROGRAM & DISCUSSIONS

WORLD CASHEW PRODUCTION

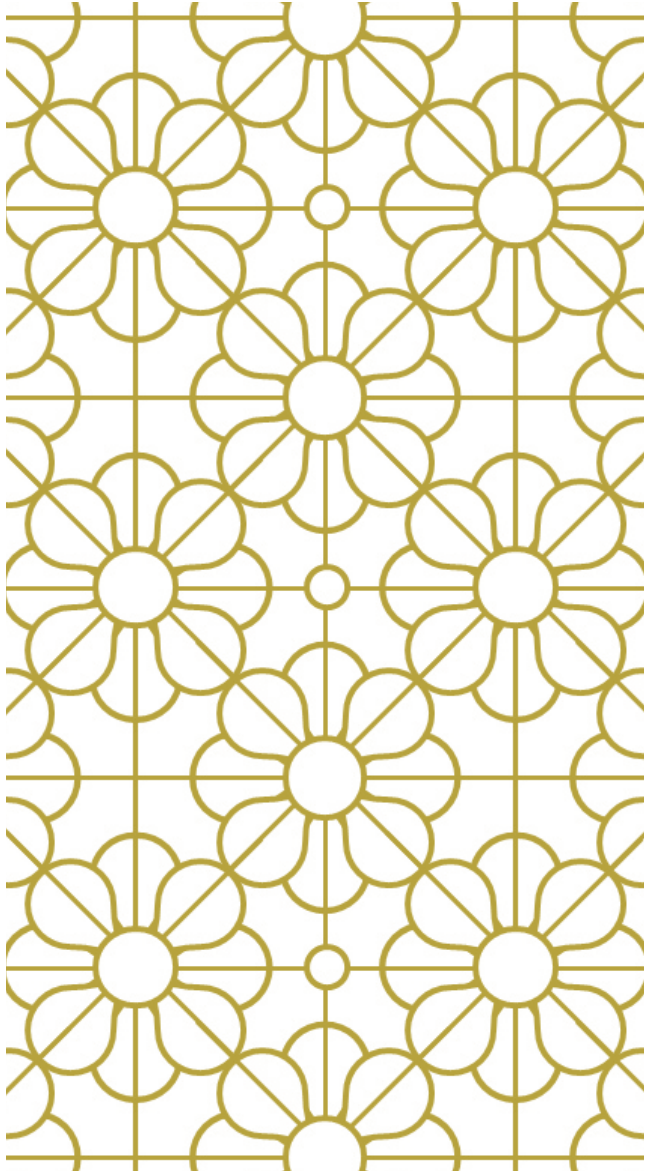
INDUSTRY CHALLENGES

CONSUMPTION PREFERENCES & TRENDS

QUALITY AND UNDERSTANDING OF GRADES

AWARENESS & PROMOTION

DEMAND DRIVERS



## Introduction to Value Added Snacks

In 2020, the value of the savory snacks market in India was around 5.57 billion U.S. dollars, compared to approximately 6.25 billion U.S. dollars in 2019. The savory snacks market in India, which includes nuts, seeds, potato chips, and meat snacks, showed an increasing trend from 2019 and is expected to reach almost 13 billion U.S. dollars by 2026.

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# NUTS IS THE SECOND LARGEST SAVORY SNACK CATEGORY

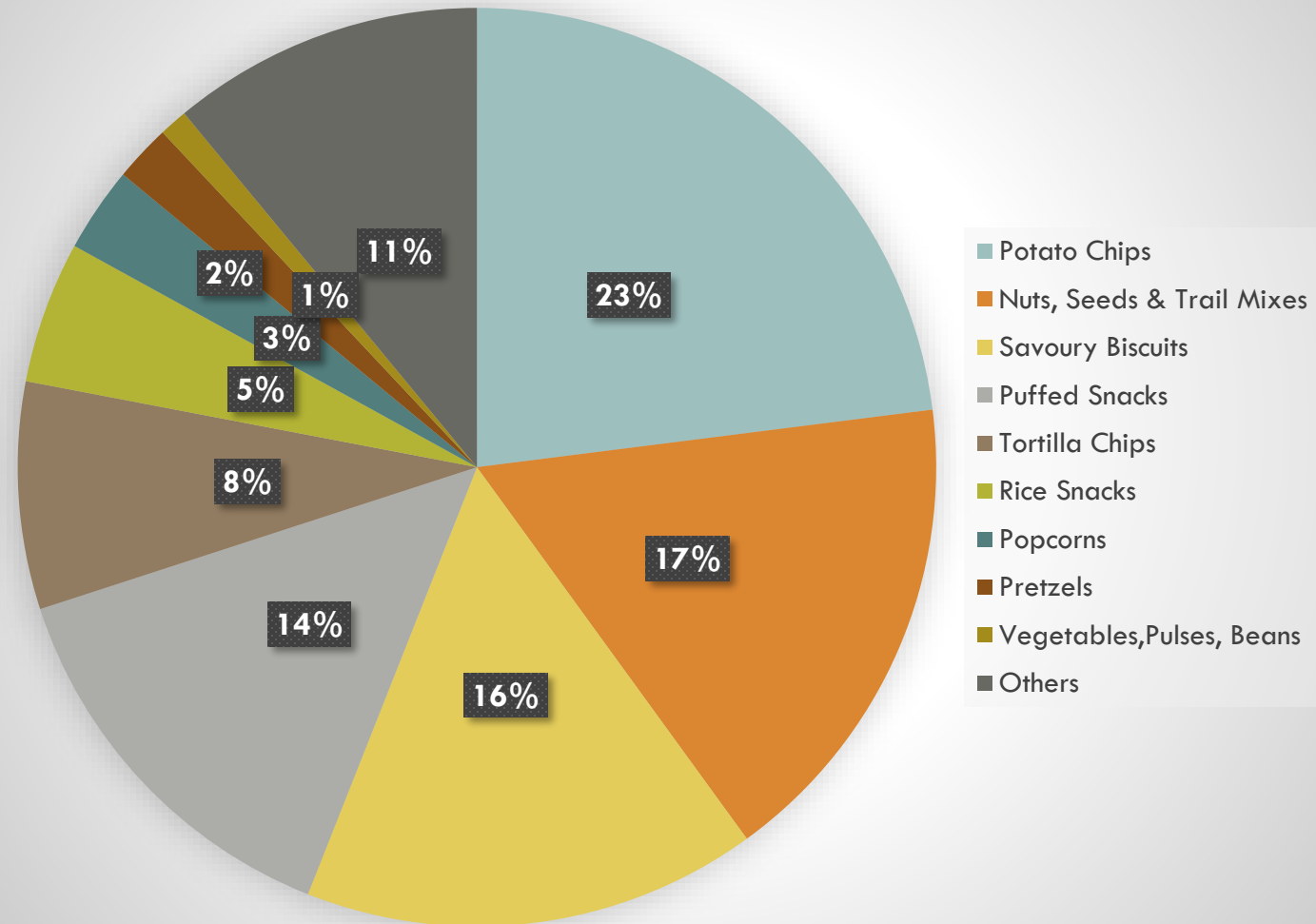
## Global Perspective

Nuts is currently the second largest savory snack category

Expected to remain one of the strongest growth drivers within savory snack category

Growth sustained by increasing consciousness for health and wellbeing nutrition

## Sales





# CASHEW VALUE- ADDITION

Sources: World Nut and Dried Fruits Congress, Dubai

**ESTIMATED WORLD CASHEW PRODUCTION**

Raw Cashew Nut ( RCN) Metric Tons

	<b>2021/2022</b>			<b>2022/2023</b>	
<b>Country</b>	<b>Crop</b>	<b>Total Supply</b>	<b>Ending Stock</b>	<b>Crop</b>	<b>Total Supply</b>
India	7,38,000	7,38,000	N/A	6,75,000	6,75,000
Vietnam	4,00,000	4,00,000	3,00,000	3,00,000	3,00,000
Cambodia	3,00,000	3,00,000	N/A	5,00,000	5,00,000
Cote DIVOIRE	1,00,00,000	1,00,00,000	N/A	10,50,000	10,50,000
Nigeria	2,40,000	2,40,000	N/A	2,25,000	2,25,000
Guinea-Bissau	1,80,000	1,80,000	N/A	85,000	85,000
Ghana	1,80,000	1,80,000	N/A	1,80,000	1,80,000
Benin	2,40,000	2,40,000	N/A	2,20,000	2,20,000
Burkino Faso	1,00,000	1,00,000	N/A	1,30,000	1,30,000
Guinea Conakry	60,000	60,000	N/A	90,000	90,000
Senegal	35,000	35,000	N/A	50,000	50,000
Togo	20,000	20,000	N/A	40,000	40,000
Gambia	15,000	15,000	N/A	20,000	20,000
Mali	7,000	7,000	N/A	10,000	10,000
<b>Sub Total Western Africa</b>	<b>20,77,000</b>	<b>20,77,000</b>	<b>N/A</b>	<b>22,90,000</b>	<b>22,90,000</b>
<b>Sub Total Northern Hemisphere</b>	<b>35,15,000</b>	<b>35,15,000</b>	<b>3,00,000</b>	<b>37,65,000</b>	<b>37,65,000</b>
Tanzania	2,20,000	2,20,000	N/A	2,25,000	2,25,000
Mozambique	65,000	65,000	N/A	85,000	85,000
Kenya	6,000	6,000	N/A	5,000	5,000
<b>Sub Total Eastern Africa</b>	<b>2,91,000</b>	<b>2,91,000</b>	<b>N/A</b>	<b>3,15,000</b>	<b>3,15,000</b>
Brazil	1,35,000	1,35,000	N/A	1,20,000	1,20,000
Indonesia	1,15,000	1,15,000	N/A	1,20,000	1,20,000
<b>Sub Total Southern Hemisphere</b>	<b>5,41,000</b>	<b>5,41,000</b>	<b>N/A</b>	<b>5,55,000</b>	<b>5,55,000</b>
Other	54,000	54,000	N/A	55,000	55,000
<b>World Total</b>	<b>41,10,000</b>	<b>41,10,000</b>	<b>3,00,000</b>	<b>43,75,000</b>	<b>43,75,000</b>

2021/22 Cambodia Underreported, Actual crop 600k Mt

# INDUSTRY CHALLENGES

Bigger Crops

High Input Costs

Price Inflation & its impact on demand especially on Nuts-Luxury commodity

Understanding on Quality & Grades

Consumption Trends

Raw Vs Value Added

Ingredients

Value Addition-Preferences

Price Points

Mass consumer base