



africasheW240

2014

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!

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Message from the President

Dear Cashew Colleagues,

2014 was a highly eventful year for the African Cashew Alliance, with notable expansions in both our activities and our impact.

Perhaps most significantly, this year ACA entered a major new area of work: training farmers. Many of our members face challenges in sourcing consistently high-quality kernels at the farm level; to address this issue, we launched two major training programs. Firstly, we worked with partners to implement a “Master Training Program” for cashew stakeholders in seven different African countries to create a strong knowledge base that can be utilized throughout the value chain. Meanwhile, we strengthened our own staff base through the recruitment of an expert agronomist, who implemented the first stage of a program of training representatives of farmers’ groups. Our pilot scheme involved the successful training of 2,000 Nigerian in good agricultural practices and harvest/post-harvest operations, and we look forward to replicating this success in more African countries in the years to come.

The impact of the ACA Quality and Sustainability Seal continued to grow in 2014. This year, FoodPro, the first Nigerian and seventh African processor, successfully became approved in the ACA Seal’s standards of food quality and social responsibility. With the commitment of major international buyers to prioritize the purchase of African-processed nuts, a further nine processors across the continent are now working towards Seal certification.

Within ACA itself, we were delighted to appoint the first African member to our international Advisory Board in March 2014: Kenya’s Equatorial Nut Processors, a long-standing ACA member and Seal-accredited processor. The addition of an African perspective to the Advisory Board introduces invaluable insight into the challenges and opportunities experienced by the continent’s

industry in the global market, strengthening our organization’s ability to react to global market trends to the benefit of our members.

Across Africa this year, we were happy to note that more and more governments are officially recognizing the importance of the cashew industry. Kenya, Tanzania, Benin, The Gambia, and Guinea-Bissau were among the nations whose governments launched new initiatives to bolster the position of their domestic cashew industries, highlighting the fact that cashew has huge potential to strengthen national economies all over the continent.

One disappointment we experienced in 2014 was the unfortunate cancellation of the ACA Annual World Cashew Festival & Expo when it became clear that international fears over the Ebola virus would severely impact the attendance of the huge range of global industry professionals who take part in the event each year. Nevertheless, ACA was able to maintain a highly visible presence at cashew and food industry events worldwide throughout the year, from Africa to Australia to Paris to the United States. We look forward to meeting you all once again at the next World Cashew Festival in 2015!

On behalf of the Executive Committee of the African Cashew Alliance, I express our best wishes for a happy 2015. May this new year bring you, your families, and your collaborators health, peace, prosperity, and success in your various endeavors to create an even more fruitful and beneficial environment for all of the stakeholders in the cashew sector.

Georgette Taraf

2012 – 2015 ACA President



ACA in a Nutshell

The African Cashew Alliance was established in 2006 as an alliance of African and international businesses with an interest in promoting a globally competitive African cashew industry. Today, more than 150 member companies work under the ACA banner and represent all aspects of the cashew value chain, including producers, processors, traders, and international buyers.

OUR VISION

A globally competitive African cashew industry that benefits the value chain – from farmer to consumer.

OUR MISSION

Support the African cashew industry by:

- Providing technical assistance and facilitating investments
- Promoting market linkages and international standards
- Sharing information and best practices

OUR OBJECTIVES

- Increase processing of cashew within Africa
- Improve competitiveness and sustainability of the African cashew industry
- Facilitate public-private cooperation for the cashew sector



5-YEAR TARGETS

More than 170,000 MT cashew processed in Africa by 2015

Partnership agreements in 6 countries in Africa by 2015



Governance & Team

ORGANIZATIONAL STRUCTURE

The **Executive Committee** (EC) is ACA's governing body, providing strategic direction, general guidance, and oversight to the ACA Secretariat. The EC is elected for two-year terms by the core ACA members and consists of seven seats: five representatives from private sector companies registered in Africa's cashew-producing countries (i.e. no shares or other institutional relationship with an overseas company), and two candidates from international companies that have invested in cashew processing in Africa. The seven EC members convene twice a year.

The **Advisory Board** consists of delegates from organizations providing more than \$50,000 USD of funding per year. The Board has a veto right regarding the use of ACA funds and provides advice on ACA programming.

The **Secretariat** manages program development and implementation, and is responsible for daily ACA operations including event management, marketing and promotion, project management, elections, technical assistance, membership, monitoring and evaluation, and fundraising.

The **Steering Committee** provides input and is responsible for presenting proposals and country-specific information to the Executive Committee and the Secretariat. Its participants are appointed by national private cashew business associations, or ACA national committees.

The **National Committees** or National Private Cashew Business Associations, partner with ACA to disseminate information, promote and advocate for cashew business, and represent ACA at the national level.

ACA Members are individuals or institutions (both private and public) involved in the cashew sector. Members pay an annual membership fee based on their status and are responsible for electing the Executive Committee every two years.

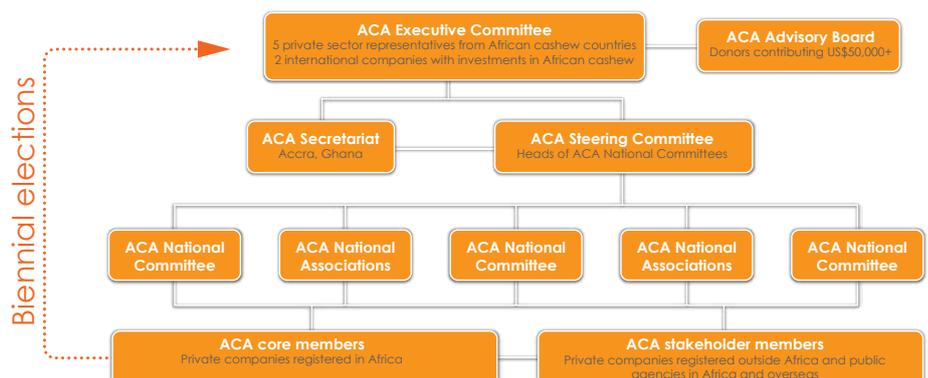
To find out more information about the benefits of being a member visit our membership page: www.africancashewalliance.com/member

2012-15 Executive Committee

- President**
Georgette Taraf, Benin Gold, Benin
- Vice Presidents**
Koffi Yao Appia, COOPRADI, Côte d'Ivoire
Edgar Maokola-Majogo, Southern Jumbo Cashew, Tanzania
- Executive Committee Officers**
Tola Faseru, Colossus Investments Ltd., Nigeria
Jace Rabe, Tolaro Global, USA
Venkatesan Rajkumar, Rajkumar Impex, India
Patrick Wainaina, Jungle Nuts, Kenya

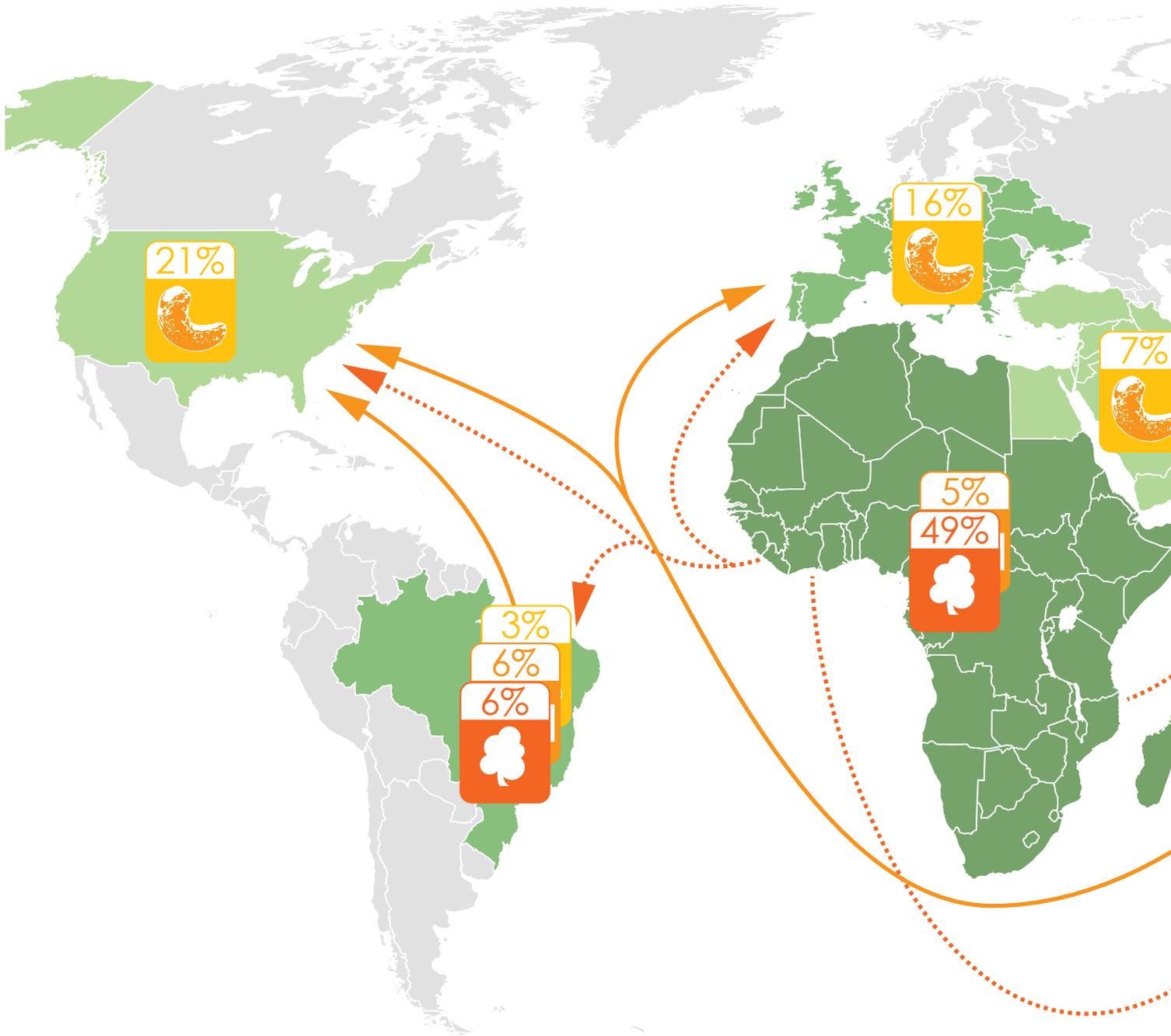
Advisory Board

Equatorial Nut Processors, Intersnack, Kraft Foods, Olam International, USAID





World Cashew Map



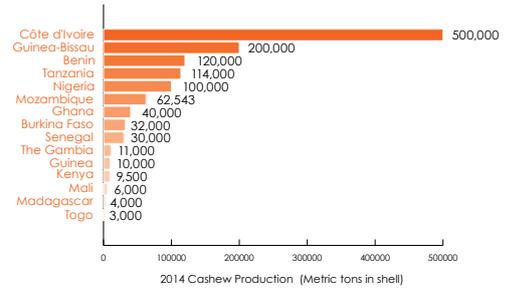
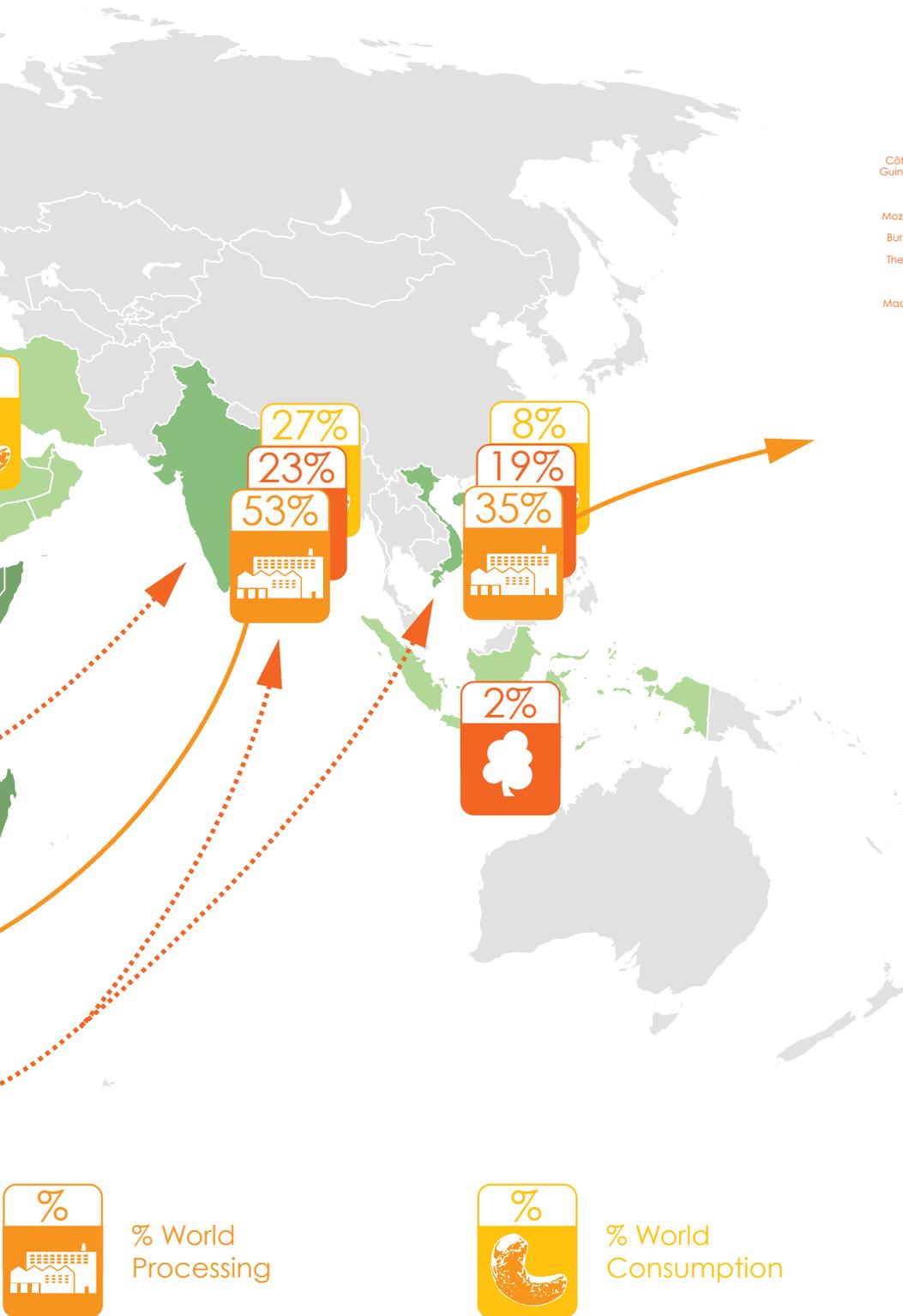
Raw nuts shipped



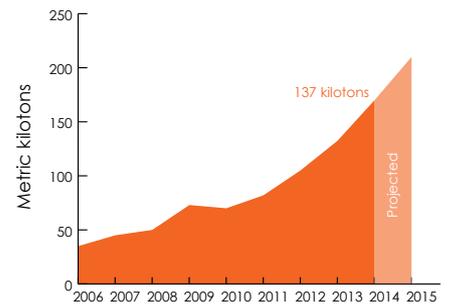
White kernels shipped



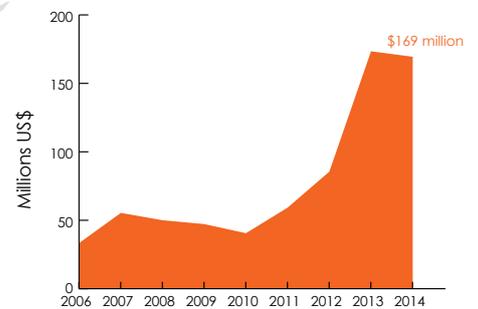
% World Production



Cashew production in Africa



Raw cashew nuts processed in Africa



Value of Kernels Exported from Africa

From Seed to Snack:

Components of the Cashew Value Chain

Throughout the last decade, the African cashew industry has progressed from an emerging sector into an integral component of Africa's economy. With activity concentrated mostly in East and West Africa, cashew business is attracting increasing interest from Brazilian, Asian, European, and American investors.

While cashew production is well established, the focus of the African cashew industry is to capture the value of the raw material through the development and strengthening of processing capacity on the continent. Currently, Africa produces approximately 49% of the world's cashew supply; however, the industry's great potential remains largely untapped – East Africa processes around 26% of the raw nuts produced in the region, and West Africa processes only 10%. Increased processing in Africa would add

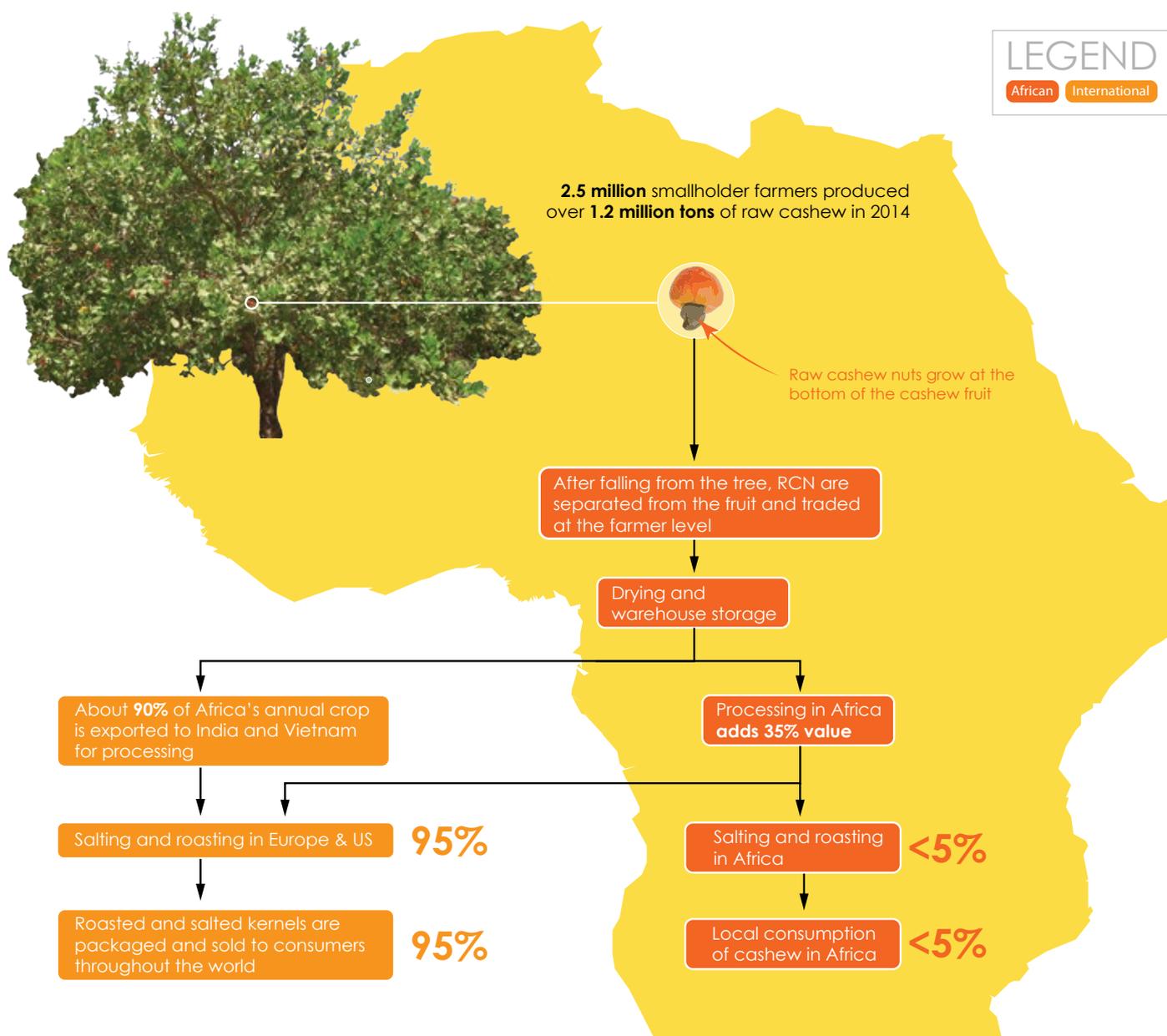
tens of thousands of jobs and generate hundreds of millions of dollars in revenue for the continent. Through ACA's assistance in 2014, nearly \$5 million in additional income was generated for rural communities and over 2,000 jobs were created.

Almost 90% of the African supply of raw cashew nuts are exported primarily to India, Vietnam, and since 2011, Brazil. These raw nuts are then processed and sold to roasters and retailers in Europe and North America who distribute them to consumer markets.

Since its creation in 2006, the African Cashew Alliance has tirelessly worked to improve this situation. Producing approximately 49% of the world's raw nuts, Africa is demonstrating to businesses, governments, and international

organizations that there are major benefits to supporting the processing sector on the continent. In 2014, processing volumes in Africa increased to 137,000 MT – quadruple the initial 35,000 MT observed in 2006, when ACA first began monitoring processing.

This growth has resulted in benefits all along the value chain. Since 2006, ACA has facilitated investments across Africa, sustaining more than 27,000 jobs in cashew processing – most of which are filled by young women in rural areas where poverty is most endemic – as well as over \$500 million in revenue for involved stakeholders.



PRODUCTION

Originally hailing from the northern region of South America, cashew trees are now abundant in tropical regions throughout the world, with the largest concentrations found in Brazil, India, Vietnam, Indonesia, and several countries in West and East Africa. The English word “cashew” was derived from the Portuguese name for the nut, “caju,” which in turn was based upon the indigenous Tupi name, “acaju.”

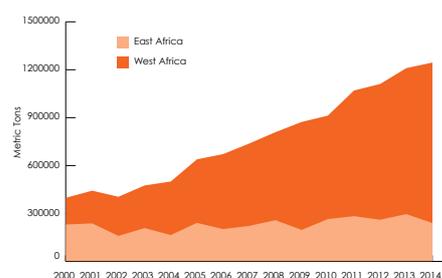
Africa’s two million smallholder cashew farmers produce about 49% of the world’s cashew crop – and the cashew sector as a whole provides income to about 10 million people on the continent.

Between 2000 and 2014, production of cashews in Africa has more than tripled, from around 400,000 MT to an estimated 1,242,543 MT in 2014, the bulk of which come from the following major producers: Côte d’Ivoire (500,000 MT), Guinea-Bissau (200,000 MT), Benin (120,000 MT), Tanzania (114,000 MT), and Nigeria (100,000 MT). Growth has been

particularly strong in West African countries, which now collectively produce more than 80% of the African crop. East African countries such as Tanzania and Mozambique have a longer-standing history in the cashew business and are more experienced in cashew processing.

Once a cashew tree is planted, it is expected to begin bearing fruit within 3-4 years; however, its peak production does not begin until 10 years after planting. After this, it will continue to produce fruit for 25-30 years, followed by a substantial decline in yield. The fruit of the tree has two components: the first is called the ‘cashew apple,’ which is red in color when it is ripe. The second is a nut containing the cashew kernel and is attached to the bottom of the cashew apple. When the cashew apples fall to the ground, farmers collect them and detach the nuts from the apples. The nuts are sold to exporters or processing centers by local traders.

Given the recent upward trend of cashew

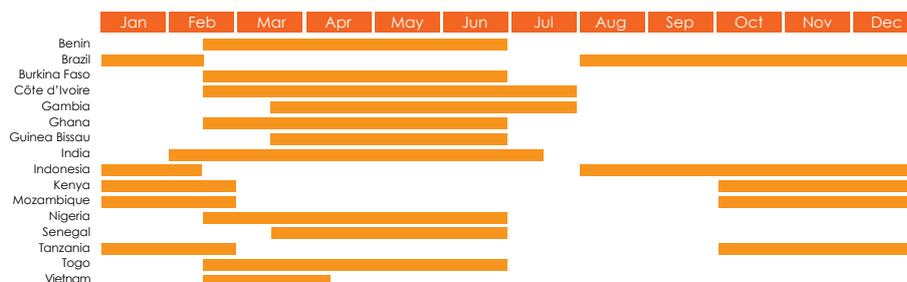


Cashew produced in East and West Africa

nut prices, smallholder farmers in Africa are likely to continue planting more cashew trees, thereby increasing continental production yields. Currently, African tree productivity, or yield per tree, is relatively low compared to South Asian trees (1.5-4 kg/tree versus 7-11 kg/tree). However, as ACA has begun to explore, improved agricultural and post-harvest practices have begun to greatly improve the farmers’ return on the crop.

HARVEST

Throughout most of the year, there are African smallholder farmers collecting cashew nuts. The African harvest begins in West Africa where, across the region, the harvest season runs from February to June. Nigeria and Benin are typically the first countries to produce nuts in February, while Guinea-Bissau tends to wrap up the season in June. There is a brief hiatus during the summer months in which most nuts have been harvested, but the East African season begins in mid-September and lasts through late January. The average West African farmer household collects between 500-1,200 kg of raw cashew nuts per year, which they sell to consolidators, who then sell to exporters, sometimes via other intermediaries.

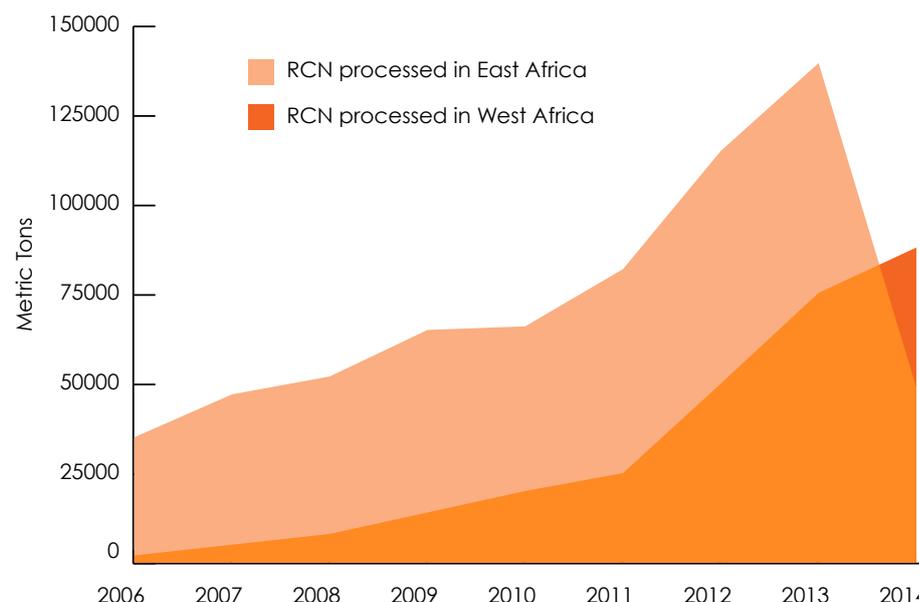


Cashew harvesting seasons

PROCESSING

African cashew is either processed locally or exported for processing through traders. The process of transforming the raw cashew nut into a consumable commodity entails a myriad of steps. The raw nuts must be sorted and cleared of any foreign material. Then they undergo the process of shelling, which can either be done manually or mechanically. While most small-scale processors in Africa practice manual shelling, the larger plants tend to have mechanized facilities. After shelling, the testa (a thin skin) of the kernel must be removed. To do so, the kernels are dried, causing them to shrink and thereby allowing the easy removal of the testa. The actual removal of the testa is known as a process called peeling, which can be done by hand or by peeling machines. Kernels are then classified into one of 26 grades according to size, color and condition.

Processing cashew is labor-intensive, so it has the capacity to generate employment for large numbers of people for shelling, peeling, and grading the nuts. An average-sized processing plant, which can process four MT of raw cashew per day, is estimated to employ no less than 200 workers. Access to finance is a major constraint to the growth of the processing industry in Africa.

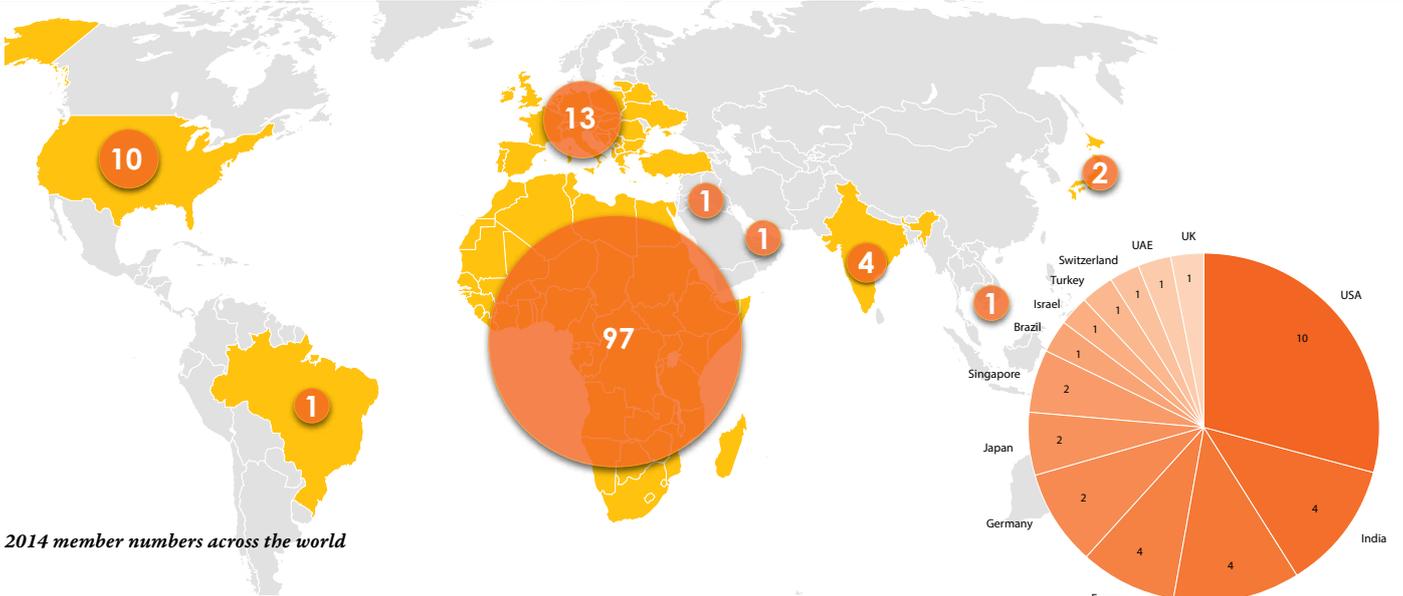


RCN processed in East and West Africa (estimation)

Due to the seasonality of the crop, processors require large amounts of liquidity during the harvest season in order to buy and store an entire year’s stock of raw material for processing. Banks

in Africa focus primarily on financing short-term raw nut trade transactions instead of yearlong processing of cashew nuts.

ACA in Review: 2014 Activities & Achievements



2014 member numbers across the world

Member representation from overseas

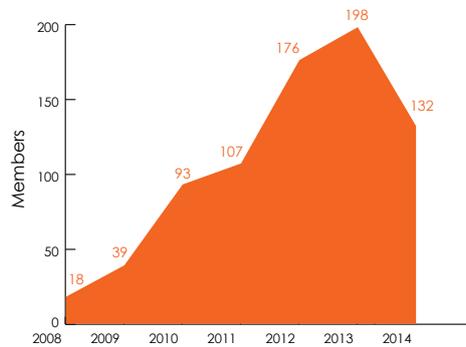
MEMBERSHIP

In 2014, ACA's network of members from across the African continent and the globe remained strong.

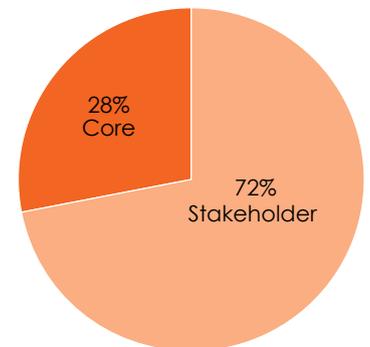
- 132 members
- 56 new members

ACA distinguishes between **Core** and **Stakeholder Members**:

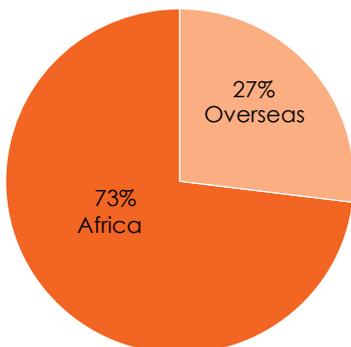
- **Core Members** are private companies registered in Africa—72% of the membership base in 2014
- **Stakeholder Members** are private companies registered overseas along with public agencies in Africa and overseas—28% of the membership base in 2014



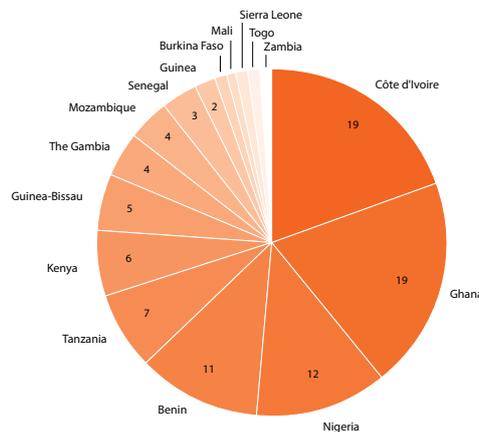
Membership growth



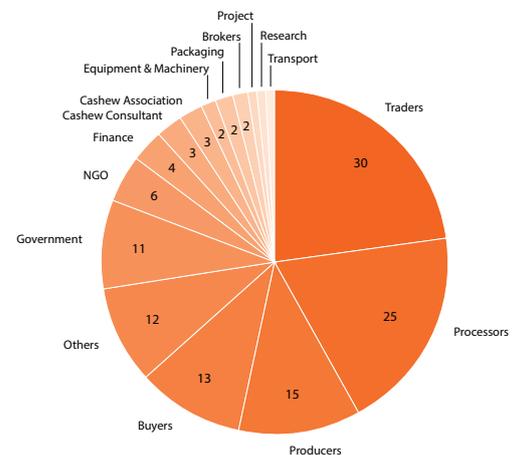
Core vs Stakeholder membership



Members from Africa vs Overseas



Member representation in Africa



Members by field

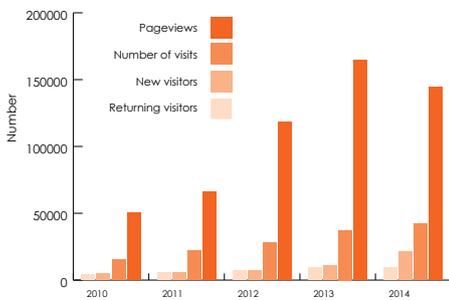
COMMUNICATIONS

ACA Objective: Disseminate information and promote ACA

The ACA Communications department works closely with the Market Information System, project management, and technical teams to provide timely and accurate information to all of ACA's members and constituents and to ensure that members receive exclusive market intelligence to help them plan their business activities. ACA disseminates its information through three major channels:

Website

ACA maintains and updates a web platform with user areas for both the general public and for its members. It keeps the public informed about ACA's activities in the field and general cashew industry news, both within Africa and globally. The website also features a recently upgraded Market Information System that provides users with currency exchange rates, freight rates, global prices of RCN, CNSL, shells and kernels, as well as market analysis reports from ACA's network of experts. The site also features an extensive library of publications, written both by ACA and by other experts in the field.



ACA website statistics

Publications



Throughout the year, ACA disseminates a range of publications, providing regular reports on market conditions and the latest news on ACA's activities. These publications are:

- AfricasheW320 – Bi-monthly newsletter highlighting ACA's latest successes
- AfricasheW450 – Monthly market analysis reports with both global and African perspectives
- AfricasheW240 – Annual report that details all of ACA's activities throughout the year
- AfricasheW Splits – Weekly market updates on the production, processing, and trade of cashews in Africa

Social Media

ACA's social media presence provides additional channels to disseminate cashew-related information, both to the general public and to industry stakeholders. On ACA's primary social media outlets, Facebook and Twitter, followings dramatically increased in 2015, while ACA also maintained an additional presence on YouTube and LinkedIn.



650 Likes
142% increase over 2013



390 Followers
133% increase over 2013



PROCESSING SUPPORT AND BUSINESS ADVISORY

ACA Objective: 170,000MT cashew processed in Africa by 2015

■ 2014 Status: 137,000MT processed

The services of ACA experts are a valuable resource to all stakeholders in the cashew industry, from established processors to new players to the industry. Through personalized packages, ACA provides business advisory, technical assistance, capacity-building trainings, access to financial facilitation, and crucial linkages to ensure cashew businesses operate, grow, and expand efficiently.

We offer

Business Advisory Services

- Advice and training on financial and operations management
- Assistance in hiring and training workers in specialized skills
- Trainings to processors for scale and capacity improvement

Investment Facilitation

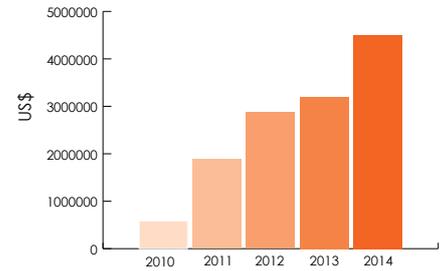
- Advice on choosing suitable processing equipment and technology
- Support in selecting site, installing equipment, and designing operations
- Information on regulations and incentive schemes
- Linkages to government agencies, service and raw material suppliers

Access to Finance

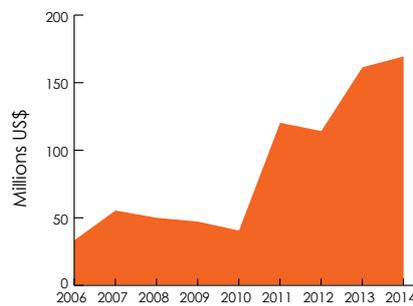
- Support in submitting credit-worthy business plans and loan applications
- Banker trainings in specifics of cashew financing
- Partnerships with financial institutions for cashew financing

2014 Results

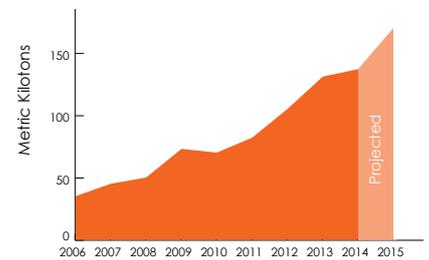
- 137,000 MT of RCN processed in 2014
- Installed capacity of ACA members reached 257,150 tons in 2014
- 70 million in new investments and expansions of all ACA members in 2014
- \$53.2 million in additional incomes for African processing employees in 2014
- \$99.9m facilitated in kernel exports by ACA member companies in 2014
- \$64,422 raised as Business Advisory revenues from consulting services delivered to various companies in 2014



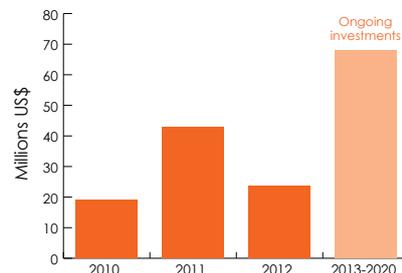
Loans facilitated



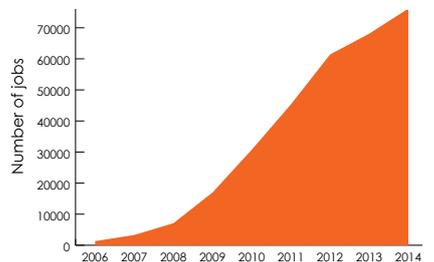
Total sales facilitated



Raw Cashew Nuts processed



Investment facilitated by ACA and Partners



Processing jobs created





ACA QUALITY AND SUSTAINABILITY SEAL

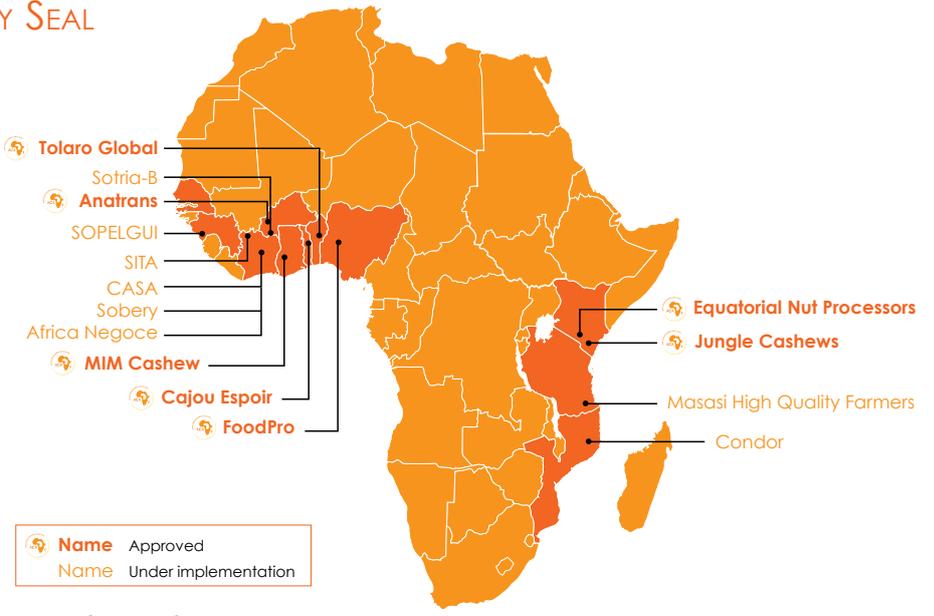


2014 was another landmark year for the ACA Quality and Sustainability Seal. Another processor joined the ranks of African companies who have achieved ACA Seal

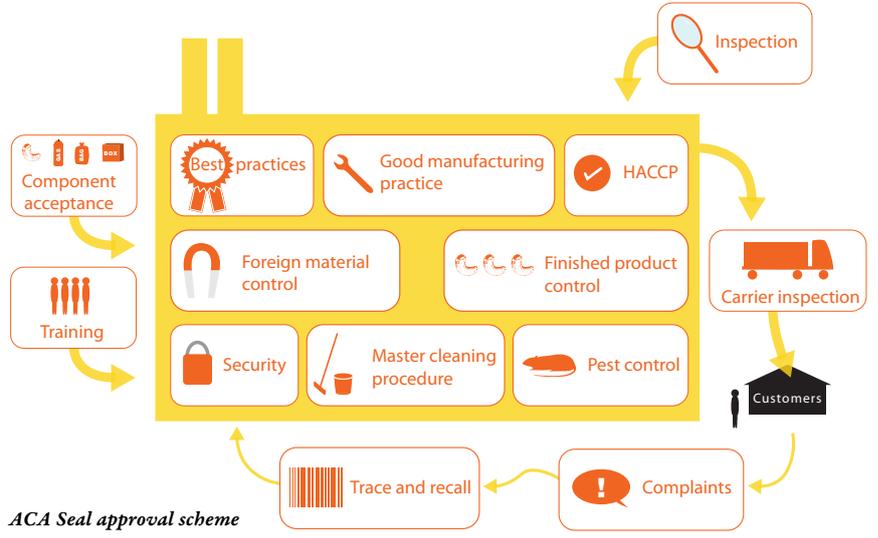
certification, raising the total to seven processors across the continent. This seventh business is called FoodPro, the first Nigerian company to earn the ACA Seal. Furthermore, two other companies – Tolaro Global in Parkaou, Benin and Mim Cashew in Mim, Ghana were successfully re-certified for the third year in a row. The remaining certified companies are Anatrans in Burkina Faso, Cajou Espoir in Togo, and Equatorial Nut Processors and Jungle Cashews in Kenya. Collectively, these seven factories produced \$24 million of processed kernels.

The ACA Quality & Sustainability Seal is an industry-supported mark that signals the processor's compliance with international food safety, quality, and social standards. The expanding implementation of the ACA Seal in East and West Africa indicates the Program's success across ACA member countries. At the end of 2014, ten processors in Benin, Burkina Faso, Cote d'Ivoire, Guinea, and Tanzania were in the implementation phase of the program.

Many large-scale buyers are excited about the credibility that the ACA Seal provides to cashew kernels processed in Africa and have committed to introducing these kernels to consumers. On the other hand, the processors who have received the Seal or who are in the process of obtaining it have expressed their appreciation for its attractiveness to buyers and the advantage it provides in achieving other international standards, such as HACCP and ISO 22000.



ACA Seal approved companies



ACA Seal approval scheme



FARMER ENGAGEMENT

In January 2014, ACA received a three-year grant from the USAID Towards Inclusive Markets Everywhere Annual Program Statement (TIME APS), which aims to empower rural populations throughout West Africa. Under this program, ACA (along with the Global Shea Alliance and Borderless Alliance) has worked to engage rural farmers to enhance quality and meet international standards in the cashew sector by improving product quality, increasing consumer awareness, and fostering market linkages. Ultimately, these efforts link rural female farmers in Benin, Burkina Faso, Cote d'Ivoire, Ghana, and Nigeria to international value chains.

In this first year of the program, ACA hired an expert agronomist to develop a training regimen that could be extended to 12,000 rural farmers by the end of the three-year program. To reach out to the targeted number of farmers,

ACA opted for an approach in which it trains extension officers in Good Agricultural Practice, who then, in turn, duplicate the trainings for farmers in their respective villages. By the end of 2014, ACA was able to reach out to a total of 2,023 farmers. In follow-up visits, it was verified that the trainings had been effective and that the farmers had applied the majority of the lessons to their farms already. These trainings serve to improve the quality and quantity of nuts supplied to the factories, which thereby improves buying relations and transparency between the farmers and processors.

The successful implementation of the first year of the TIME program will be extended to Cote d'Ivoire and Benin in the first half of 2015, with potential to expand into other countries in the future.



ADVOCACY AND PARTNERSHIP FOR CASHEW

ACA objective: Partner with 12 National Cashew Associations by 2015

■ **2014 Status: 10 partnership agreements signed**

ACA partners with national and international institutions to promote the cashew industry by improving the policy environment for cashew business, promoting cashew consumption, facilitating regional trade, supporting investments and mobilizing resources for the industry. From 2006-2014, ACA gathered more than 5,000 public and private stakeholders in workshops and conferences discussing cashew-specific issues.

2014 Highlights

ACA signed 3 partnership agreements which serve to promote national cashew industries and facilitate market knowledge sharing to strengthen its Market Information Systems:

- Association Malienne des Exportateurs de Cajou (AMEC) – Mali
- Federation National des Producteurs d'Anacarde due Benin (FENAPAB) – Benin
- Agencia Nacional de Caju de la Guinea-Bissau (ANCA) – Guinea-Bissau

2014 Financial Highlights

BUDGET 2014

REVENUE (A):	Bal. before 2014 (US\$)	2014 Cash receipts (US\$)
USAID GDA	0	489,000
USAID TIME	0	137,000
PRIVATE SECTOR & SERVICE REVENUE	122,000	382,000
TOTAL CASH REVENUE (A)		1,130,000

EXPENDITURE (B):		
USAID GDA		489,000
USAID TIME		137,000
PRIVATE SECTOR & SERVICE REVENUE		504,000
TOTAL EXPENDITURE (B)		1,130,000

CASH AND CASH EQUIVALENT (A-B)		0
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ACA's budget for 2014 was adversely impacted by the cancellation of the annual ACA conference, which led ACA to use its reserves to carry on its core activities.

PROJECTED BUDGET 2015 (US\$)

REVENUE (A):	Bal. 2014 (US\$)	2015 Cash receipts (US\$)
USAID GDA	0	506,000
USAID TIME	0	221,000
TRADE HUB NETWORK	0	186,000
WALMART FOUNDATION	0	510,000
AFRICA TRADE FUND (AFTRA) BY AFDB	0	169,000
IGF (PRIVATE SECTOR AND SERVICE REVENUE)	0	848,000
TOTAL CASH REVENUE (A)		2,440,000

EXPENDITURE (B):		
USAID GDA		506,000
ACI-GIZ		221,000
TRADE HUB NETWORK		186,000
WALMART FOUNDATION		510,000
AFRICA TRADE FUND (AFTRA) BY AFDB		169,000
IGF (PRIVATE SECTOR AND SERVICE REVENUE)		439,000
TOTAL EXPENDITURE (B)		2,031,000

CASH AND CASH EQUIVALENT (A-B)		409,000
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2014 ACA Members

BENIN

Benin Gold

Fludor Benin SA

Groupe Benkan

INRAB

Nad & Co Industries

Root Capital

Tolaro Global

URCPA

URPA

URPA-AD

Womangnon

BRAZIL

Secretariat of Science, Ceara

BURKINA FASO

Sotria B – SARL

COTE D'IVOIRE

CABN

AFRECO

Africa Negoce

ARECA (CCA)

Cajou des Savanes

COOPABGB

Coopradi

COPAS

CPNK

Dincomci

Farm Invest

Firca

INC – CI

Mutaza Ecodaiz

Ocean SA

SITA SA

Sobery

Societe Ivoirienne de Technology Tropical

UCONAKO

FRANCE

Cap Industries

AJV

SODEPAC International

THE GAMBIA

Chamber of Commerce, Gambia

Gambia Groudnut Group

IRD Gambia

Passy Farmer Assn Representative

GERMANY

Christian Dahm

The Siam Intercorp Co Ltd

GHANA

3F Ghana Commodities

Blackstar Foods Ltd

Cashew Industry Assn. of Ghana

Cashew King

Delmas Shipping

Elantra Links

Greenland Commodities

K Ofori and Sons

Kany Corporation

Kona Agro

Maviga Ghana

Mim Cashew

Outgrower and Value Chain Fund

Shexin Gh Ltd

Sitos Commodities

USAID – Ghana

USIBRAS Gh

West Africa Market Links

Wordsworthy Press & Packaging

GUINEA

Agri Commodities Amp Finance FZ

Sopelgui

GUINEA-BISSAU

ANCA – Guinea-Bissau

Armazens de Bandim

Min of Trade and Valorisation

No Fianca

INDIA

Buddhi Industries

GI Overseas	NIGERIA	Masasi High
K. Gopinathan Nair & Co	BG Contracting Ltd	Naliendele
Samsons Traders	CADP Nigeria	PACE Tanzania Ltd
ISRAEL	Ejima Ogbadu Strategic Farms	Selam Ltd
DS Constructions	Esteema Diamond	Southern Jumbo
JAPAN	Filcajou	TOGO
Blaxton Corporation	Havila Global	Cajou Espoir
Hardnut International	Kogi Women Empowerment Network	TURKEY
KENYA	KD Foods	Toyart Ltd
Afrimac Nut	NCAN	USA
Equatorial Nut Processors Ltd	Wakman Golden	Caro Nut Cashew International Ltd
Jungle Nuts	Wehsac Farms	farm2market
Ministry of Agriculture	SENEGAL	Golde River Orchards
NutPak	Chamber of Commerce Ziguinchor	IMS
Responsability	Padec	JB Sanfillipo
MALI	Peace Corps – Senegal	Krafft Foods
Compagnie Commercial du Mali	SIERRA LEONE	Red River Foods
MOZAMBIQUE	SLIEPA	The Richard Franco Agency
CALIPSO	SINGAPORE	UAE
Condor Caju	Kontakt Pro	Al Keddah Trading
Condor Nuts	Olam International	VIETNAM
INCAJU	SWITZERLAND	Amberwood Trading Ltd
THE NETHERLANDS	LB Nuts Ag	ZAMBIA
Fairmatch	TANZANIA	Cashew Growers Assn of Zambia
Intersnack Group	Cashew Nut Board of Tanzania	
TDG	Export Trading Group	

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