



Cashew Industry Update: A global context and Australian position on cashews

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2017 Australian Nut
Conference

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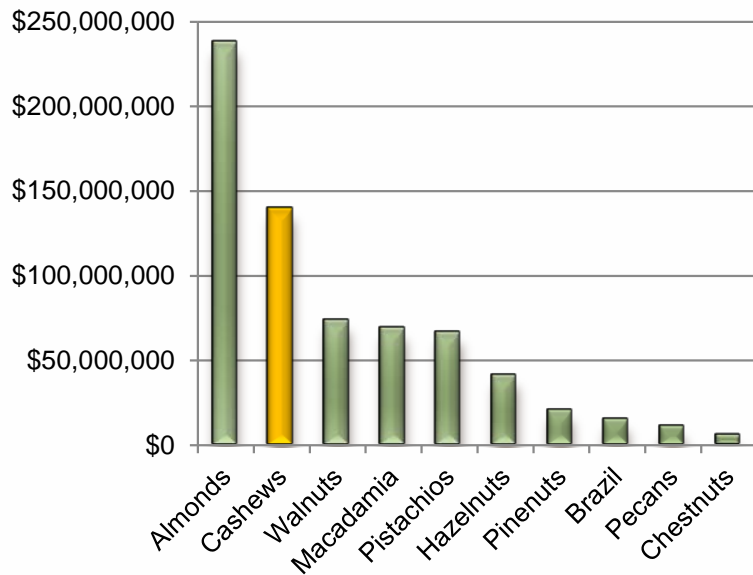
Australian Cashew Market



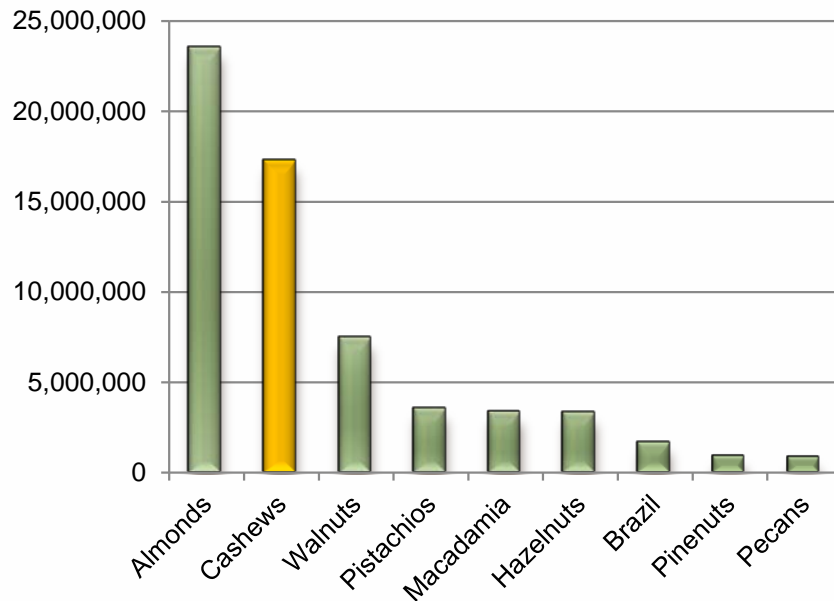
- Australia is the seventh largest cashew kernel market and highest per capita consumer of cashews in the world
- The supply chain can be volatile and problematic at times
- Import dominated
- Cashews now sit as one of the most expensive tree nuts
- Even though the Australian crop is growing, by industry terms the crop would be classified as small scale with kernel processing continuing to take place abroad

Australian Comparison

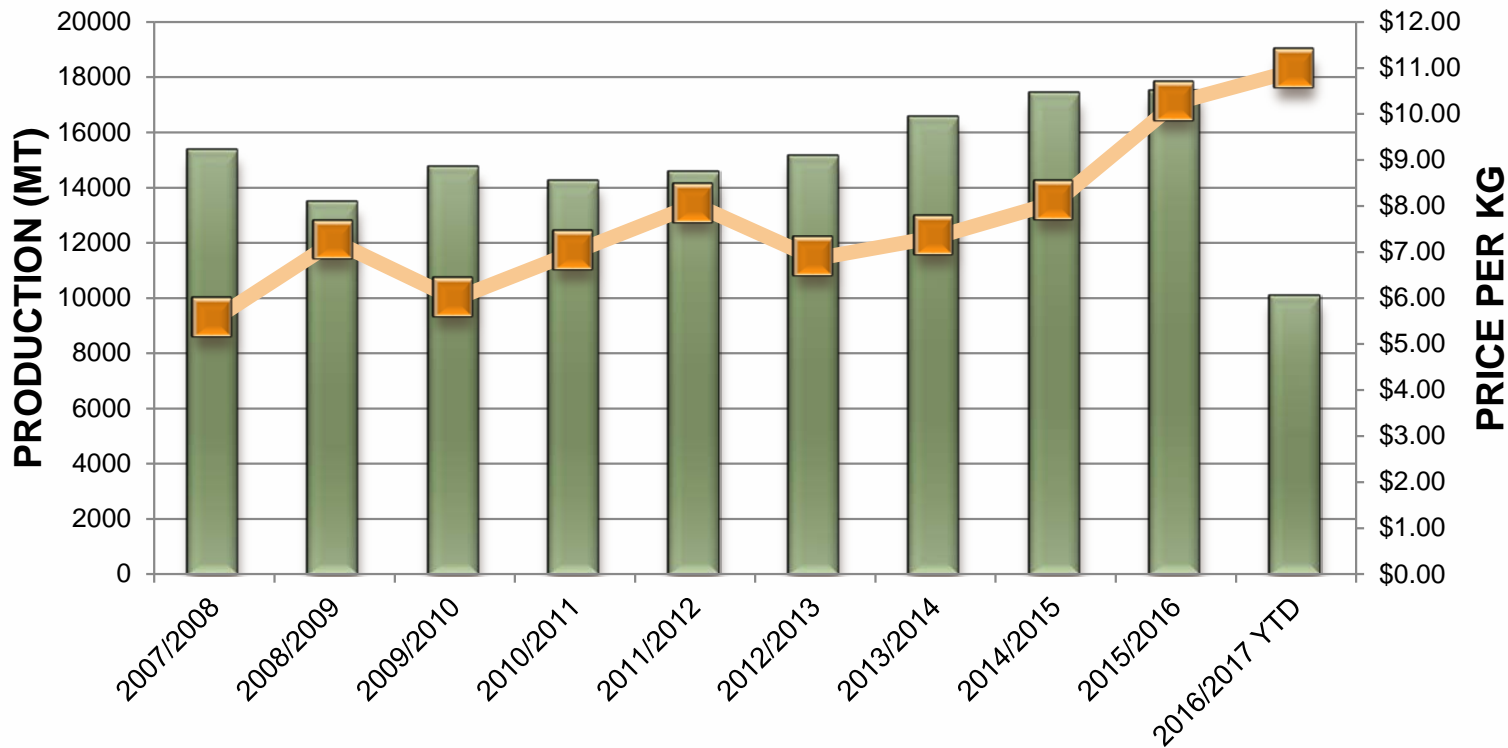
2014/2015 Total Supply (\$)



2014/2015 Total Supply (MT)



Australian Cashew Kernel Volume vs. Price

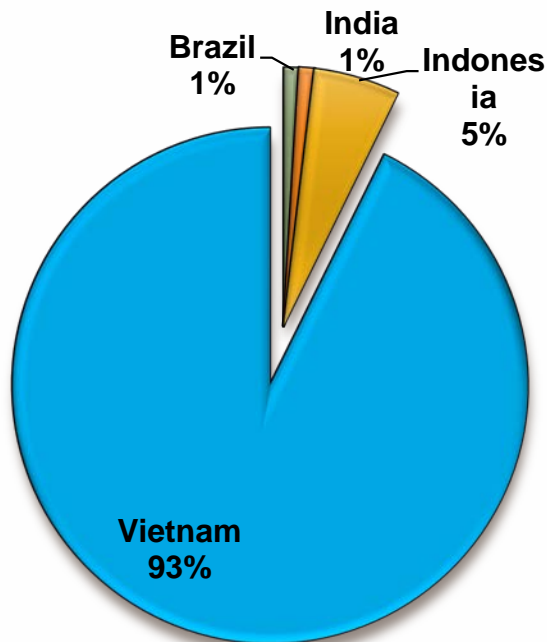


Source - ABS

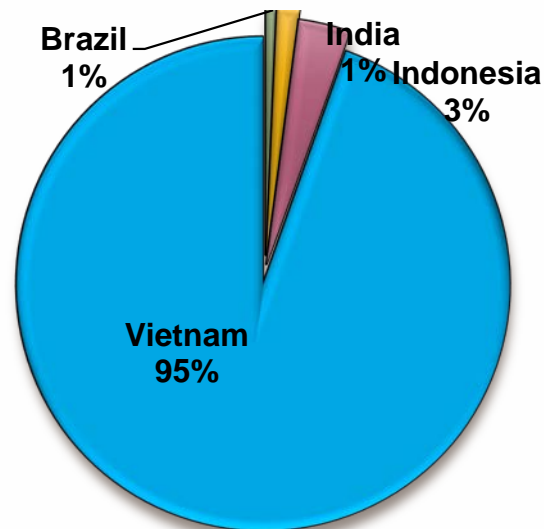
Volume Price

Cashew Imports

Into Australia for 2015-2016 FY and 2016-2017 YTD

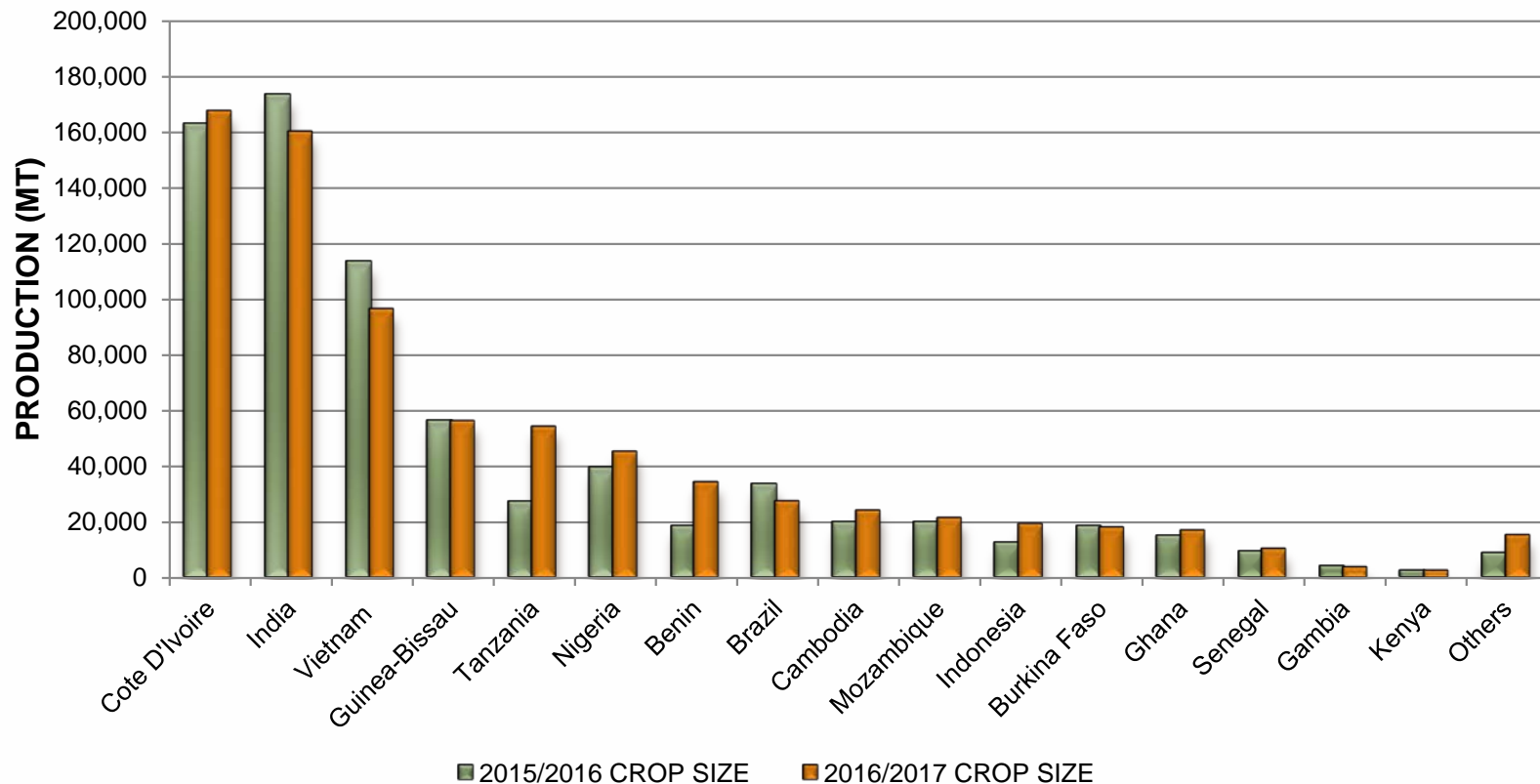


2015/2016 Total 17,423Mt



2016/2017 YTD (Feb 2017) – Total
9987Mt

World Crop Sizes



World Production Vs Consumption

Growing

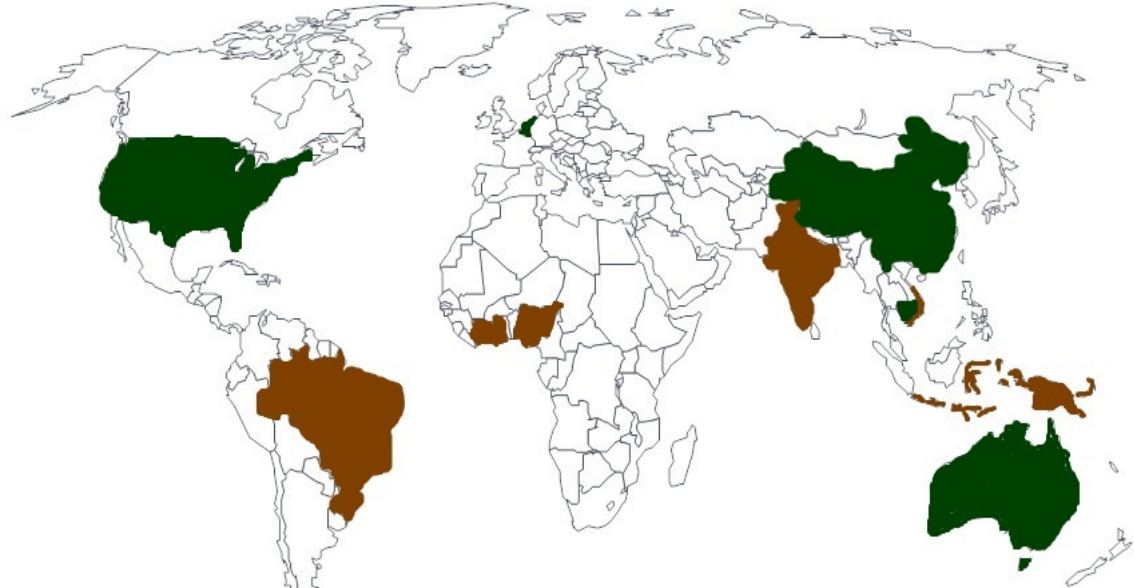
India, Cote D'Ivoire, Vietnam, Guinea-Bissau, Brazil & Tanzania are the major Cashew Tree growers

Processing

India, Vietnam & Brazil make up the majority of the worlds production.

Consumption

USA, India, China, the Netherlands (EU trade) and Australia are the highest consumers of cashews

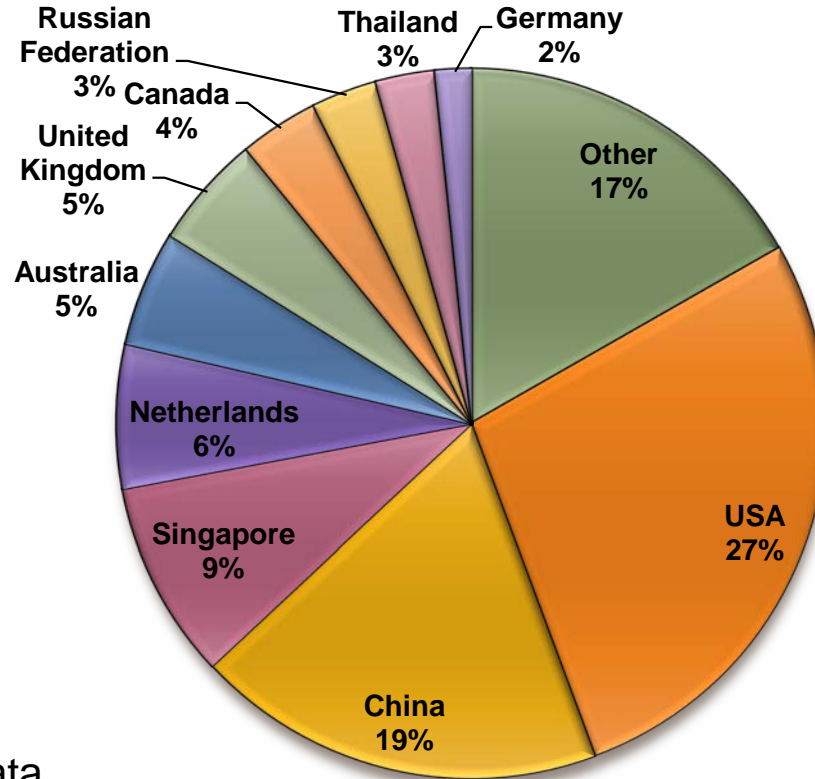


Major Producers



Major Consumers

Top 10 Kernel Import Countries



Based on 2016 INC Data

Changes in the Industry

- What goes up must come down?
- Increased demand for traditional Western grades
- Vietnams crop increasing?
- Africa becoming more important for raw kernel

A.C.A Executives



Australian Cashew Association

Chairman Vacant
Vice-Chairman Quin Scalzo

Committee

Paul Rath Rath & Co
Laurence Van Driel Select Harvest
Gerard Brunton GB Commtrade
Andrew Waring MWT

Other Attendees

Michael Waring, Mario Gallucci, Vince Scalzo

Member of INC Global Cashew Task Force