



COMPETITIVE CASHEW INITIATIVE

Promoting competitive cashew value chains: creating jobs and revenues for farmers and increasing in-country processing

Introduction

The African cashew sector offers high economic development potential. Global productivity as well as international demand are on a constant rise. Meanwhile Africa belongs to the largest cashew producers with 57% - almost 6 out of 10 cashews - coming from Africa. In West Africa in particular, production has risen sharply since 2012 and cashew has established itself as the second most important agricultural export commodity. However, due to insufficient processing capacities and labour productivity in the cashew processing industry, only about 10% of the raw nuts are processed in the African producer countries. Most of the *raw cashew nuts* (RCN) are exported to Asia, mainly to Vietnam and India.

Cashew production and processing therefore offers a great potential for poverty reduction through the creation of jobs and the associated generation of income. In addition, cashew trees grow well by intercropping them with other crops such as peanut and maize, thus promoting food security. Through the application of Good Agricultural Practices and the introduction of bee colonies in the plantation, yields can be increased by up to 50% and with it the income of farmers.

As part of the programme “Agricultural Value Chains for Sustainable Development”, the Competitive Cashew initiative - ComCashew (formerly African Cashew initiative - ACi) focuses on building sustainable cashew value chains and increasing the competitiveness of African cashew production and processing. To achieve this goal, the project provides support along the entire cashew value chain including research, production, processing and marketing as well as capacity development and policy advice.

ComCashew is a private-public partnership project under the implementation of the *Deutsche Gesellschaft für Internationale Zusammenarbeit* (GIZ) GmbH. It is currently funded in its third phase by the *German Federal Ministry for Economic Cooperation and Development* (BMZ),

the *Swiss State Secretariat for Economic Affairs* (SECO) and *European Union* (EU) in Ghana. Together with private and public actors, ComCashew constitutes a new era of multi-stakeholder partnership aiming to achieve sustainable poverty reduction in the project countries Benin, Burkina Faso, Côte d'Ivoire, Ghana, Mozambique and Sierra Leone, by enhancing the competitiveness of African cashew smallholders, processors and other actors along the value chain.

With its approach, ComCashew strongly contributes to the achievement of the following Sustainable Development Goals:



This booklet illustrates the programme's unique approach for sustainable cashew value chains and documents the results and impacts ComCashew achieved since its implementation in 2009.



Overview Value Chain Programmes

Competitive African Cotton Initiative COMPACI
2008 - 2017

Competitive African Cashew Initiative ComCASHEW
2009 - 2020

Sustainable Smallholder Agribusiness/ Cocoa-Food Link Program SSAB
2009 - 2019

Competitive African Rice Initiative CARI
2013 - 2021

Success Factors



Scalability

Regional outreach and adaptability resulting in „economies of scale“



Learning

Institutionalised exchange among the projects plus adoption of best practices between projects and countries



Governance

Board structure involving African and international private and public partners = institutionalisation of the idea of public private partnerships (PPP)



Impact

Joint Monitoring and Evaluation (M&E) to report aggregated achievements

Impacts at a glance*



* all following figures are rounded for better presentation

Proven Approaches for Upscaling

Farmer Business School (FBS)

Agripreneurship for farmers

Matching Fund

An integrated development partnership model



Master Training Program

Creating a pool of experts for sector development

Good Agricultural Practices (GAP)

Demand orientation

Competitive Cashew Initiative



Commissioned by



Federal Ministry
for Economic Cooperation
and Development

Currently co-funded by

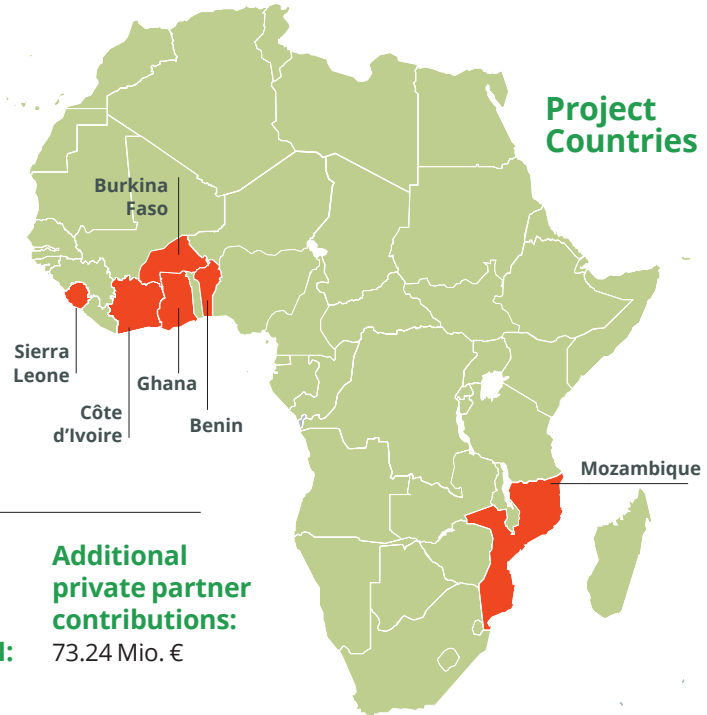


Delegation of the
European Union to Ghana



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra
Swiss Confederation

Federal Department of Economic Affairs,
Education and Research EAER
State Secretariat for Economic Affairs SECO



Project Duration

April 2009 – December 2020

Project Budget:

69.823 Mio. €

Additional private partner contributions:

73.24 Mio. €

Current Phase III:

May 2016 – December 2020

Thereof in Phase III:

30.19 Mio. €

Value Chain Approach



Key indicators



Income:

Smallholder businesses increased income



Employment:

The number of full time employment equivalents in production and employment in processing increased



Partner Contributions:

Private sector, public partners and civil society bodies increasingly implement supported activities using their own funds

ComCashew supports the Cashew value chain since more than 10 years. It aims to increase the market share of producers and local processors in the value chain.

18% Producers

14% Sales tax

8% Transport

3% Public authorities

25% Retailers

17% Roasters

9% Processors

4% Raw cashew nut traders

Profit margin in percent of 1 kg Ivorian cashew roasted in Vietnam, consumed in Germany



1KG

Objectives



Production

Improve productivity and increase quantity and quality of production

1

2

Processing

Increase quantity and quality of African cashew kernel and cashew by-product processing



Supply Chain Linkages

Establish and expand sustainable links to the global market place

3

4

Sector Organisation

Promote an enabling environment: Advocate policies that favour the cashew sector



Achievements



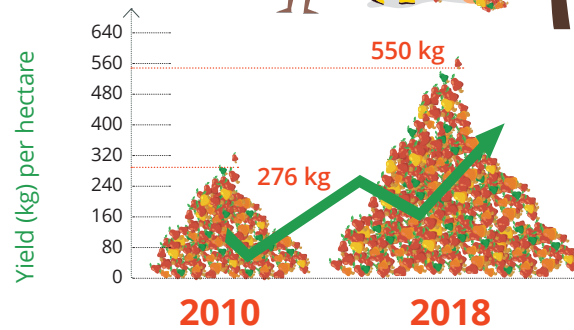
Recipient of the OECD-DAC Prize for Taking Development Innovation to Scale in 2016



623,000

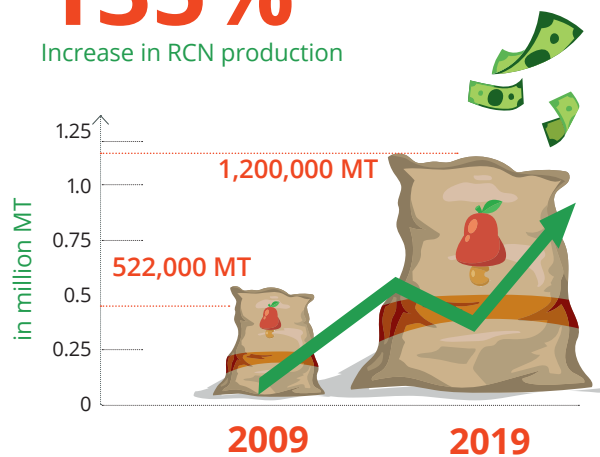
Smallholder farmers have received trainings in Good Agricultural Practice (GAP)

Average yield increase
99%



135%

Increase in RCN production

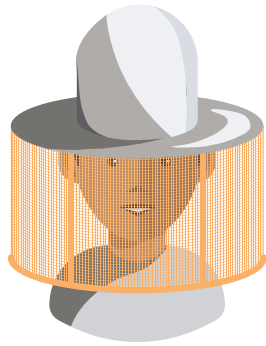


More than
40 Mio. €

taxes have been generated annually for selected cashew producing countries



If not stated otherwise, all indicators refer to the period between ComCashew's inception in 2009/2010 until 2018/2019



78%

of cashew farmers diversify their income through intercropping.

Others practice beekeeping for better pollination and additional income sources



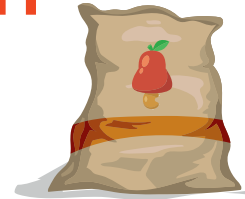
The installed processing capacity in the 5 countries increased from

60,000 MT

in 2009 to

385,000 MT

in 2019



Between 2015 and 2019 the number of jobs in the processing industry have more than doubled from

16,000

 to

38,000



Good Agricultural Practices (GAP)

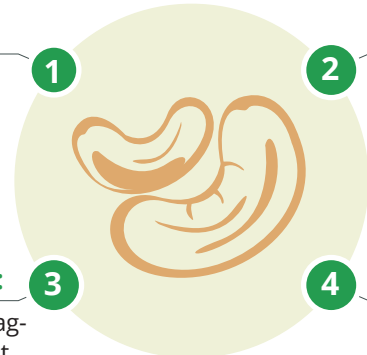
GAP adoption studies and farmer reports show that major improvements can be observed with the following practices*:



Pruning:

Apical, crowded and dead branches are removed by 85% of trained farmers stimulating productive growth, improving aeration and yield.

1



2

Weeding

84% of trained farmers control weeds.



Harvest & Post-Harvest Practices:

89% of farmers dry the nut before packaging. Jute bags, strings to separate the nut from the apple and picking the apple from the ground likewise contribute to better nut quality.

3

4

Construction of fire belt:

79% protect against bushfire using fire belts.



* Figures refer to 2015 yield survey excluding Sierra Leone

Benin



ComCashew intervention regions

158,000

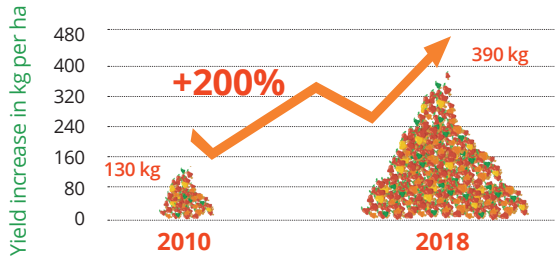
Smallholder farmers have received trainings in GAP



there of

27,000

women (17%)



Installed capacity increased from
3,100 MT
in 2009 to

51,000 MT
in 2019

National volume of RCN processed increased from

1,200 MT
in 2009 to

13,000 MT
in 2019

RCN Production in 2019



130,000 MT



118,000

Full-time job equivalents and jobs created

Number of Matching Fund projects:

12

Afokantan Benin Cashew, African Cashew Alliance, Benin Gold, Fédération Nationale des Producteurs d'Anacarde du Bénin, Fludor, Frito Lay, GAPA, gebana Benin, Institut National des Recherches Agricoles du Bénin, Intersnack, PEPSICO, Trade Development International, Tolaro, Union Régionale des Coopératives de Producteurs d'Anacarde - Atacora Dongara, l'Union Régionale des Producteurs d'Anacarde - Borgou Alibori

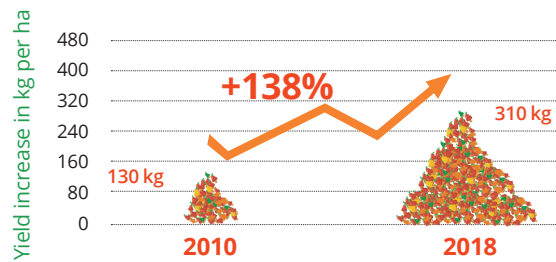
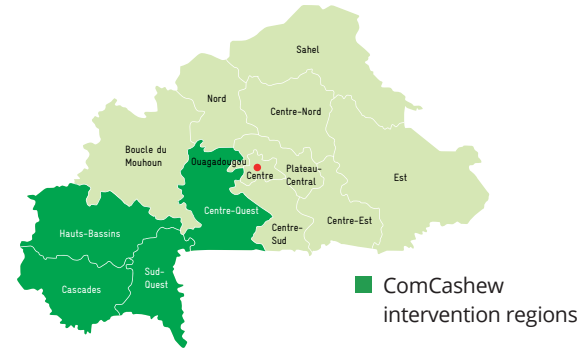


Total number of seedlings produced and distributed

312,000



Burkina Faso



110,000

Full-time job equivalents and jobs created

RCN Production in 2019



120,000 MT

Installed capacity increased from

2,600 MT

in 2009 to

39,000 MT

in 2019

National volume of RCN processed increased from

1,000 MT

in 2009 to

17,000 MT

in 2019



Total number of seedlings produced and distributed

119,000

Number of Matching Fund projects:

11

African Cashew Alliance, Anatrans, Centre National de Semences Forestieres, gebana, Institut de l'Environnement et Recherches Agricoles, Intersnack, Trade Development International, Union Nationale des Producteurs d'Anacarde

53,000

Smallholder farmers have received trainings in GAP



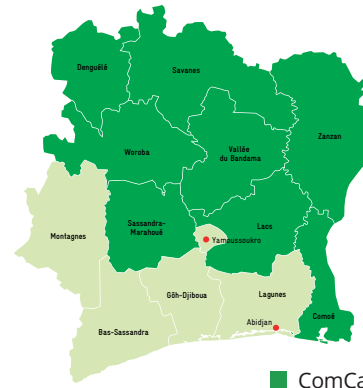
there of

11,000

women (21%)



Côte d'Ivoire



■ ComCashew intervention regions

250,000

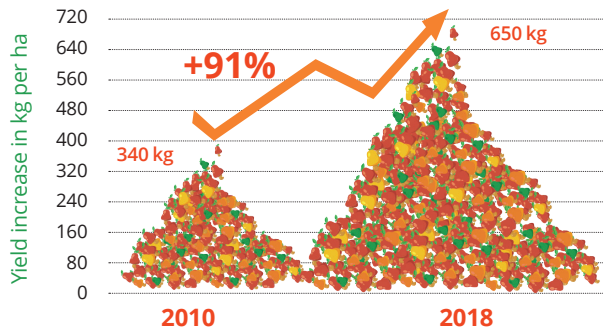
Smallholder farmers have received trainings in GAP



there of

29,000

women (12%)



Installed capacity increased from
12,000 MT
in 2009 to

140,000 MT
in 2019

National volume of RCN processed increased from

5,300 MT
in 2009 to

57,000 MT
in 2019

RCN Production in 2019



720,000 MT



298,000

Full-time job equivalents and jobs created



Total number of seedlings produced and distributed

158,000

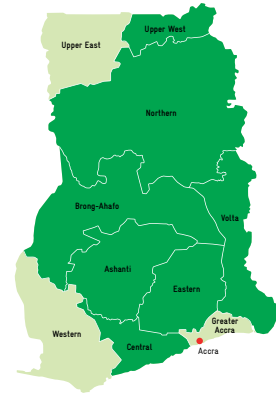
Number of Matching Fund projects:

10

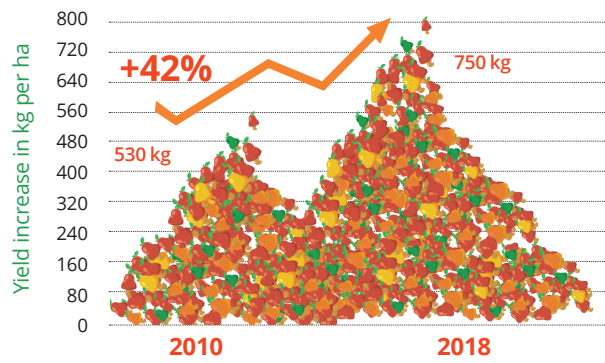
African Cashew Alliance, Africajou, Caronut, Centre National de Recherche Agronomique, Le Conseil du Coton et de l'Anacarde, COOGES, FMA, INCajou, Intersnack, Olam Seco, Olam Ivoire, Université Félix Houphouët-Boigny, Université Jean Lorougnon Guédé



Ghana



■ ComCashew intervention regions



49,000

Full-time job equivalents and jobs created

Installed capacity increased from

4,300 MT

in 2009 to

46,000 MT

in 2019

National volume of RCN processed increased from

1,000 MT

in 2009 to

10,000 MT

in 2019

RCN Production in 2019



110,000 MT

Total number of seedlings produced and distributed



1,631,000

48,000

Smallholder farmers have received trainings in GAP



Number of Matching Fund projects:

12

African Cashew Alliance, Cocoa Research Institute Of Ghana, Form International, Ministry of Food and Agriculture Ghana, Invitolabs, Intersnack, Olam, Red River Foods, Unilever, Usibras, Volta Cashew

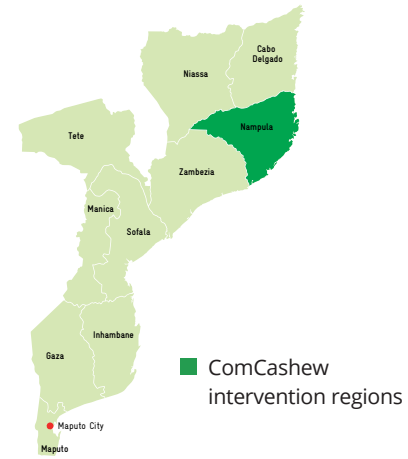
there of

13,000

women (27%)



Mozambique



113,000

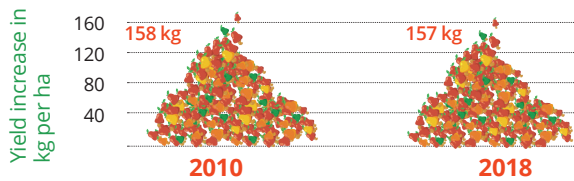
Smallholder farmers have received trainings in GAP



there of

30,000

women (27%)



Productivity in Mozambique is expected to increase although facing floods, mildew disease and a high number of old plantations. With rejuvenated plantations and the opening of the mildew spraying programme to private operators, national production is expected to increase by 40,000 MT from 2018 to 2020. (INCAJU)

Installed capacity increased from

38,000 MT

in 2009 to

108,000 MT

in 2019

National volume of RCN processed increased from

22,000 MT

in 2009 to

63,000 MT

in 2019

RCN Production in 2019

142,000 MT



Total number of seedlings produced and distributed

9,807,000

77,000

Full-time job equivalents and jobs created



Number of Matching Fund projects:

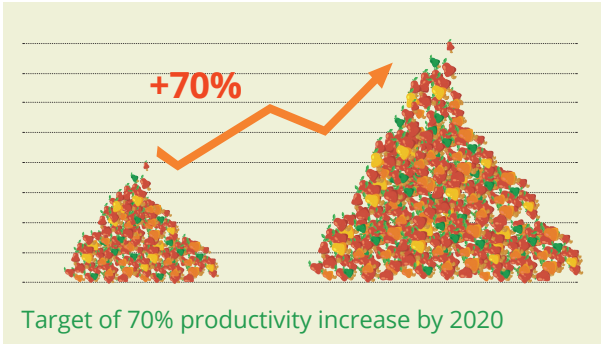
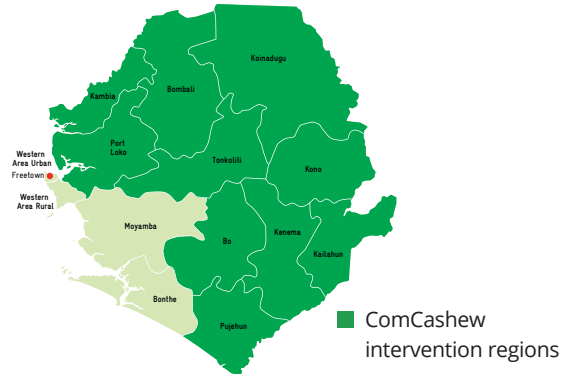
6

AICAJU, Condor, Instituto de Formento de Caju, Instituto de Investigaçao Agraria de Mocambique, Intersnack, Olam

ComCashew
project country
since 2018



Sierra Leone

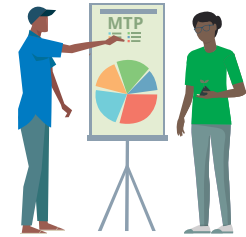


The focus lies on **increasing production** through farmer training and improved planting material.

154
potential cashew mother trees selected for analysis and future breeding program



62
Participants at the Master Training Programme



Baseline study conducted in 2018

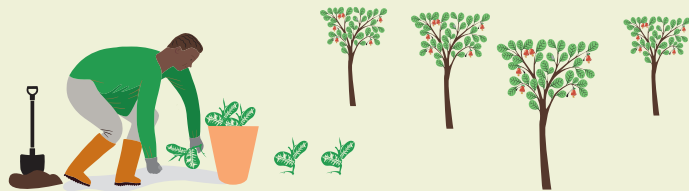
Seedlings produced and distributed
1,600,000



12,000 kg
of Polyclonal seeds have been procured from Ghana



25 Cashew nurseries have been established in 11 districts



Cooperation



Joint funding

Bill and Melinda Gates Foundation

Lead donor in phase I and II
Volume: 26.8 Mio. €
Duration: 2009 – 2016.

The Swiss State Secretariat for Economic Affairs

Focus: Processing, Sector Org.
Volume: 3.94 Mio. €
Duration: 2018 – 2020.

EU Delegation Ghana

Funds Resilience Against Climate Change project in Ghana
Volume: 19.5 Mio. €
Duration: 2018 – 2024.



New horizons

Trilateral cooperation Ghana – Brazil – Germany

Improve the quality of research, disseminate improved planting material, enhance processing efficiency and establish business linkages
Duration: 2017 – 2019



Intra-GIZ collaboration

Working with 6 other GIZ projects on cashew value chains in Cameroon, Kenya, Madagascar, Mozambique, Sierra Leone and Togo.



Extended networks

African Cashew Alliance

ComCashew has been closely linked to ACA, the African cashew industry association for more than 10 years. ACA has over 120 members.

Sustainable Nut Initiative

SNI is a cooperation platform for the nut sector and brings together 5 international front runner private companies for interventions in 8 countries



Our partner

ComCashew is steered by a multi-stakeholder Board composed of public, private and development partners that meet twice a year.



Matching Fund

Number of Matching Fund projects: **54**

The ComCashew Matching Fund is a unique private-public partnership model to accelerate the development of the cashew industry.

Matching fund partners:

- Processors of cashew nuts and apples
- Farmer-based organisations
- Government / Research
- Buyers/traders
- International kernel retailers
- Private Sector Foundations

150,000

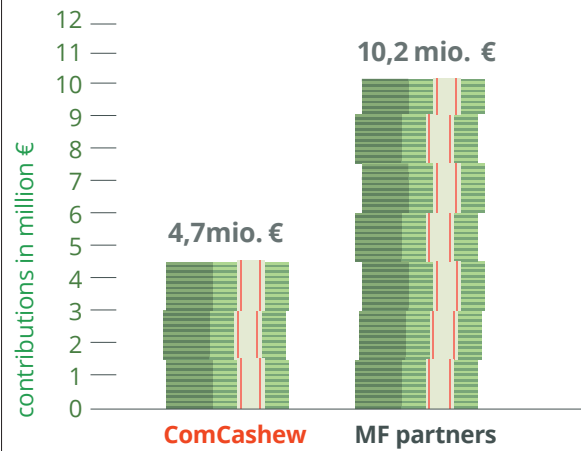
Farmers reached through past Matching Fund projects estimated

203,000

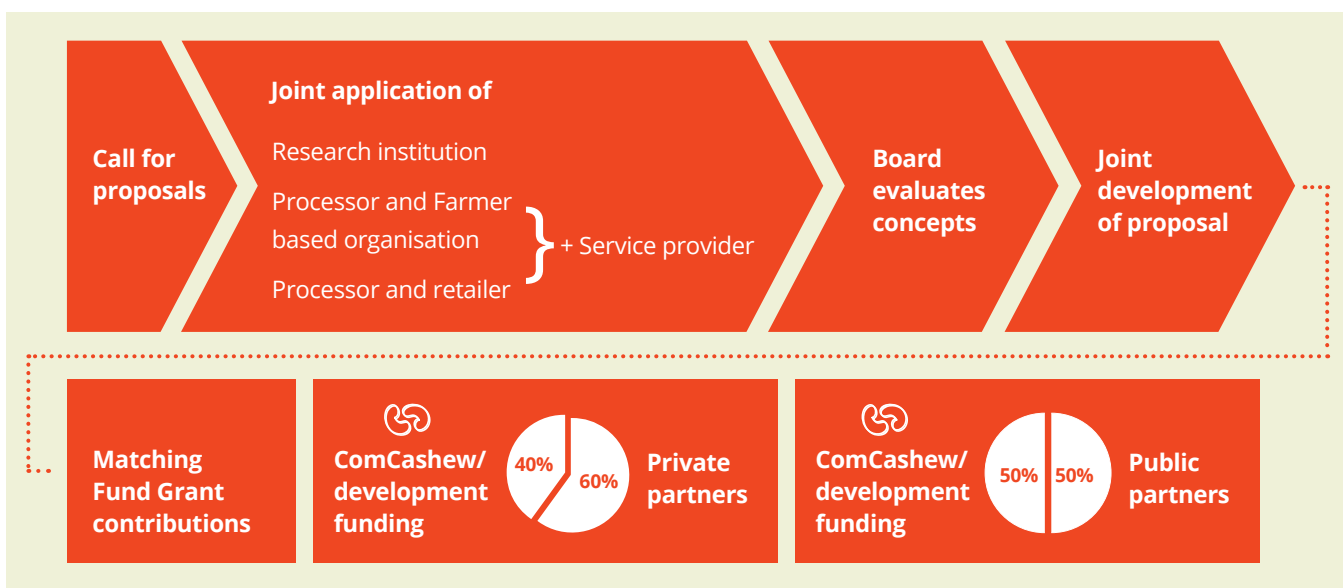
Farmers targeted in ongoing projects



Investment into the cashew value chain



Contracts are concluded in local currencies. Euro value might differ. Figures include call 1 – 6, investments in phase 2 and 3 and 8 Matching Grant Fund contracts implemented by IDH.



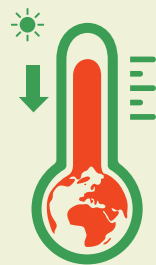
Sector Organization

4

National cashew policies and strategies have been supported and implemented



+ Advocacy for climate change adaptation strategies



ComCashew has supported:

- 12** African Cashew Alliance Conferences, out of which are 2 Sahelian Conferences
- 4** World Cashew Conferences
- 3** International Cashew Processing Fairs in Abidjan (SIETTA)
- 2** African Cashew Research Colloquiums (CIESA)

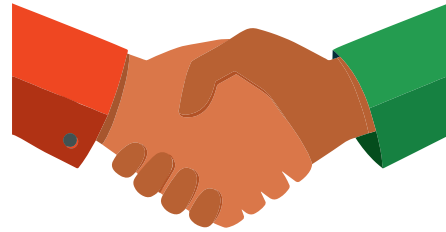


Together with public and private partners ComCashew supports the development of:

National Business Associations | Stakeholder Platforms | National Public Extension Services | Private Extension Services | National Governmental Actors | Regional bodies (governments and private)

50

Development partner identified in the cashew sector



5

Development Partner concertation meetings organised



10

Countries have joined the Consultative International Cashew Council (CICC)

2

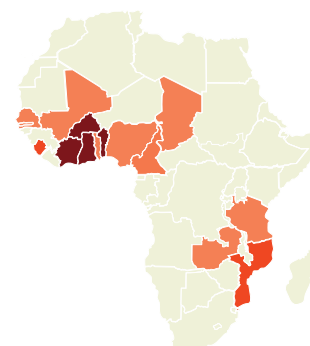
CICC Ministerial Council meetings held

Master Training Programme



Session 1		Session 2		Session 3
Cashew market	Group research project	Grafting	Training material development	Processing
Data analysis		Farm management		By-product use
Trainer's attitude		Good Agricultural Practices		Facilitation

724 Participants (in 9 editions). From 19 countries



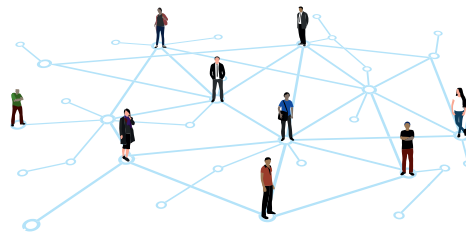
Increase in female and youth Master Trainers



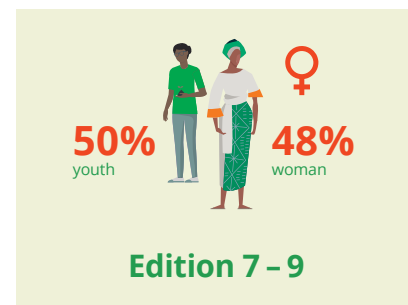
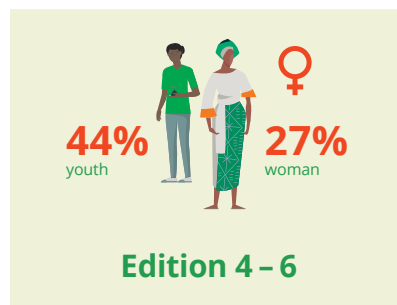
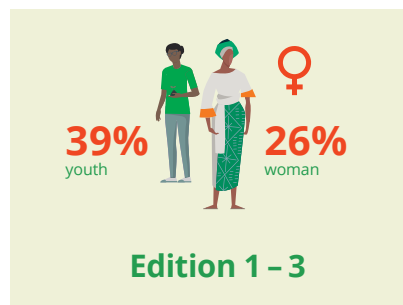
5 Cashewomen publications



3 Entrepreneur networking events



2 GIZ Gender Awards



"I succeeded, with hard work, to own a cashew farm. I now employ men and women. I encourage my sisters to go into cashew production."

FEMALE FARMER FROM SIERRA LEONE



95,000

Women trained in good agricultural practices

30,000

Women employed in the processing industries in 5 countries

Climate

1 Climate smart policy in Burkina Faso



1 National action plan for climate smart agriculture in Ghana



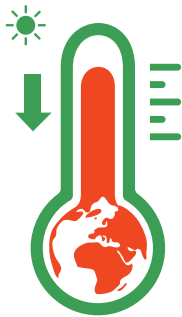
800 Seedlings planted in 10 schools



800 Seedlings distributed in northern Ghana



Resilience Against Climate Change launched in 2019



Under REACH, Resilience Against Climate Change, ComCashew is engaged in activities along decentralised, environmental planning that will support the implementation of climate-smart agricultural and land-use strategies jointly with the Ministry of Local Government & Rural Development Environmental Protection Agency Ghana and the GIZ Governance project.

Funded by



200

Districts

3

Countries for comparative studies

Pilot districts

4



58,000

People reached on social media for cashew conferences



570,000

farmers reached by radio

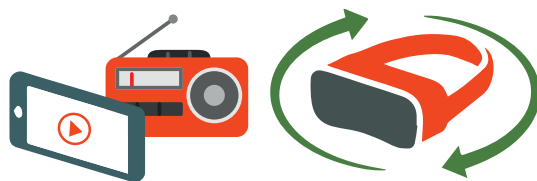


Support of **ACA Cashew App** providing reliable market data, a network platform and information on sector events

2 Virtual reality videos on production and processing developed

over **240** radio programmes in more

than **13** languages broadcasted



3S Securing Sustainable Supply Information system piloted with **30,000** farmers for traceable, sustainable value chains

SAP trade app piloted with **400** smallholder farmers



Imprint

Publisher

Competitive Cashew Initiative (ComCashew)
Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH
Dag Hammarskjöld Weg 1-5
65760 Eschborn
Germany
T +49 6196 79-0
F +49 6196 7980 - 0
E info@giz.de
I www.comcashew.org
www.a4sd.net
www.giz.de

Contact

Rita Weidinger
T +233 207705401
F +233 207705428
E cashew@giz.de
I www.comcashew.org

Concept & Authors

Kristina Kaske, Julius Abagi, Annika Luginsland,
Nina Gloger / Competitive Cashew Initiative
(ComCashew)

Design & Infographics

© creative republic, Frankfurt am Main / Germany

Basic Illustrations

© shutterstock

Image Credits

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Printed by

Braun + Sohn GmbH & CoKG, Maintal / Germany

As at

October 2019



ComCashew is implemented through
Deutsche Gesellschaft für
Internationale Zusammenarbeit (GIZ) GmbH



Commissioned by
Federal Ministry for Economic Cooperation
and Development (BMZ)



Co-Funded by
Bill and Melinda Gates Foundation,
State Secretariat for Economic Affairs SECO
and EU Ghana

BILL & MELINDA
GATES foundation







Deutsche Gesellschaft
für Internationale Zusammenarbeit (GIZ) GmbH
Dag-Hammarskjöld-Weg 1-5
65760 Eschborn, Germany

T +49 6196 79 - 0
F +49 6196 7980 - 0
I www.giz.de



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