



**Kingdom of Cambodia**

**Nation, Religion, King**

**Royal Government of Cambodia**

# **National Cashew Policy 2022-2027**

Approved by the Council of Ministers

At its Plenary Meeting on 13 January 2023

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**FOREWORD**

In this sixth mandate, the Royal Government of Cambodia has launched the Rectangular Strategy Phase IV and the National Strategic Development Plan 2019-2023, which aim to strengthen and support in-depth reforms in order to fully achieve the Sustainable Development Goals, and Cambodia's vision to achieve the status of a high middle-income country by 2030, and a high-income country by 2050. Meanwhile, this fourth phase of the Rectangular Strategy focuses on increasing productivity and competitiveness through economic diversification in high-value activities, in which agriculture is given particular consideration as one of the leading sectors that contributes to the promotion of national income growth and socio-economic development. In 2020-2021, the Covid-19 pandemic negatively affected public health, society, and all economies in the world. The Cambodian economy in 2020 slowed to a rate of -3.1%. This was due to the decline in the service and industry sectors, while the agricultural sector maintained positive growth because of its potential and resilience. The agricultural sector has made a significant contribution to maintaining food security, and providing employment and income to the people who depend on it.

Currently, most of Cambodia's agricultural products are exported, unprocessed, to neighbouring countries, which allows for only low value-added in this country. Cambodian cashew nuts are then processed by these neighbouring countries and are exported to other countries for consumption. In this regard, to continue to promote the growth in the competitiveness of agro-business in terms of quality and food safety, and especially to promote productivity, the diversification of potential crops and markets for trading, the National Cashew Policy 2022-2027 has been developed and introduced. This is of significant importance to support the implementation of policies and other strategic frameworks to ensure Cambodia's competitiveness in the local, regional, and global markets.

On behalf of the Royal Government of Cambodia, I would like to express my great appreciation to **His Excellency Pan Sorasak**, Minister of the Ministry of Commerce, in leading the formulation of the National Cashew Policy 2022-2027. I would also like to express my gratitude and appreciation to all Excellencies, ladies and gentlemen from all relevant ministries, institutions, development partners, and the private sector for their active participation in cooperating and supporting this policy.

With the official approval of the National Cashew Policy 2022-2027, I encourage all relevant ministries and institutions, the public sector, the private sector, development partners, farming communities, processors, exporters, and relevant actors to support and implement this policy in order to achieve practical and efficient results, which contribute to the enhancement of Cambodia's agro-industrial cashew development that supports sustainable and inclusive national economic growth.

Phnom Penh, 24 February 2023

Prime Minister

**Samdech Akka Moha Sena Padei Techo HUN SEN**

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## 1. INTRODUCTION

The global economy declined at a rate of -3.1% in 2020, and increased to 5.9% in 2021, while the top five economies in ASEAN (Malaysia, Indonesia, the Philippines, Vietnam and Thailand) declined at a rate of -3.4% in 2020 and increased to 2.9% in 2021, a lower-than-expected increase due to the massive outbreak of Covid-19<sup>1</sup>. Cambodia is an open economy, which was not able to escape the negative effects of this disease on its socio-economic performance. In fact, in 2020, the Cambodian economy had slowed to an annual rate of -3.1%, but was projected to grow by 3.0% in 2021, and around 5.6% in 2022. This was on account of the rapid response of the Royal Government of Cambodia (RGC), who acted in line with the economic recovery policy in a new normal, and the quick economic recovery of Cambodia's trading partners<sup>2</sup>, through the exports of products such as bicycles, electronic components, white rice and other agricultural products that have continued to maintain good growth rates. At the same time, the RGC has been implementing intervention measures to restore and stimulate economic growth in line with the Rectangular Strategy Phase IV, the National Strategic Development Plan 2019-2023 and Strategic Framework, and Programs for Economic Recovery in the Context of Living with Covid-19 in a New Normal 2021-2023. These have reflected the RGC's determination to fully achieve the Sustainable Development Goals. The Cambodian government's main strategy focuses on increasing productivity, competitiveness and economic diversification in high value-added sectors, of which agriculture and food processing is one of the priorities. This has contributed to national economic development, job creation, and a reduction in migration and poverty. On this basis, the RGC has been concentrating on the implementation of key priorities to enhance agriculture and rural development by promoting the processing industry and encouraging private investment in potential agricultural products - cashew is one of the 12 priority crops<sup>3</sup>. Cambodian cashew has a good reputation, and has especially achieved market recognition for kernel size, taste, low chemical residues, and organic by default.

### 1.1. Situation relating to the development of cashew production

Over the past five years, Cambodian cashew cultivation areas have increased significantly. Between 2015 and 2019, the cultivated area increased from 94,308 hectares to 228,037 hectares and the harvested area from 78,584 hectares to 145,840 hectares. Total production increased from 93,944 tons to 208,769 tons. By 2021, the cashew cultivation area had increased to 405,991 hectares and the harvesting area to 275,679 hectares, with an average yield of 1.74 tons per hectare and a total yield of 472,636 tons per year<sup>4</sup>. Despite this increase, cashew

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<sup>1</sup> Source: IMF World Economic Outlook October 2021

<sup>2</sup> Source: Ministry of Economy and Finance Report

<sup>3</sup> Source: Agricultural Development Strategic Plan 2019-2023

<sup>4</sup> Data source: Agriculture, Forestry and Fisheries Summary Report for 2021 and Work Target for 2022

crops still face many challenges that need to be addressed, particularly in respect of technical know-how, and the identification of good and high-yielding varieties that are disease-free and resistant to pest infestation and climate change. In addition, harvesting, processing, and storage do not yet comply with accepted technical standards, and processing capacity remains limited in terms of techniques, quantities, and human resources.

As of 2018, the number of people in rural areas who were cultivating cashew crops comprised about 70,000 families, of whom 78% were smallholder farmers cultivating on less than 5 hectares, with only 6% farming areas larger than 10 hectares. The 10 provinces with the largest areas of cashew cultivation are Kampong Thom, Ratanakiri, Kratie, Kampong Cham, Preah Vihear, Stung Treng, Oddar Meanchey, Tbong Khmum, Monduliri and Siem Reap. The most popular cashew varieties grown by farmers in Cambodia are M23, M10, M1, IM4, and H09. Semi-processing sites are located in Tbong Khmum, Kampong Thom, Kampong Speu and Kandal provinces<sup>5</sup>. By 2020, there were 12 cashew processing enterprises<sup>6</sup>, 4 cashew nut processing companies<sup>7</sup> and 59 export companies<sup>8</sup>. In 2019, Cambodia was 10<sup>th</sup> among the world's top cashew growing countries. Ivory Coast has the world's largest cashew harvesting area with 1,913,073 hectares and a total yield 792,678 tons per year. The following nine countries with the largest harvesting areas were India, Tanzania, Benin, Indonesia, Brazil, Guinea-Bissau, Burundi, Vietnam, and Cambodia<sup>9</sup>.

## **1.2. Processing and market demand**

Cashew nut processing is attracting both local and foreign investors, but the ability to control the quality, hygiene and processing of Cambodia's agricultural products is still limited. To boost production, Cambodia needs processing techniques and large-scale processing plants, which comply with quality and hygiene standards. Cambodia has the capacity to produce more than 200,000 tons of raw cashew nuts per year, but is currently able to process only 5% of this, and most of the raw cashew nuts are exported to neighbouring countries for processing. This has meant that Cambodia has been losing opportunities in value-adding and job creation. It also means that Cambodia has been failing to capitalise on the reputation of its cashew nuts in terms of their delicious taste. In future, Cambodia will expand its cashew market beyond the existing neighbouring markets. However, the country still faces substantial challenges: the supply chain of raw cashew nuts to local processors is not reliable because farmers are dependent on neighbouring markets, which can absorb most of the country's unprocessed cashew nuts.

In 2020, the effects of the global Covid-19 epidemic plunged the global economy into a deep crisis and severely disrupted regional and global supply chains. In fact, global market demand for cashew nuts-in-shell declined sharply in 2020, with purchase orders dropping by US\$1,507 million compared with 2019. India was the largest importer in the world of in-shell cashew nuts, heading the top 10, followed by Vietnam. However, in the

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<sup>5</sup> Data Sources: Cambodian Cashew Value Chain Evaluation Report (December 2019)-HEKS/EPER

<sup>6</sup> Data Source: Ministry of Industry, Science, Technology and Innovation

<sup>7</sup> Data Source: Council for the Development of Cambodia

<sup>8</sup> Data Source: Department of Export and Import of the Ministry of Commerce

<sup>9</sup> Data Source: Food and Agriculture Organization of the United Nations (FAO)

four years of 2016 to 2019, Vietnam led the rankings for the import of in-shell cashew nuts, with a global market share about 53.40% valued at US\$1.586 million, and India was ranked second with 43.97%, worth US\$1.306 million. The value of cashew nut imports, in-shell, on the world market fell from US\$2,856 million in 2019 to US\$1,349 million in 2020<sup>10</sup>. Demand for in-shell cashew nuts decreased by around 13%, from a total of US\$3,835 million in 2020, compared with a total of US\$4,411 million in 2019. By 2020, the United States had the highest demand for cashew kernels - at 28.76% of the world market share, valued at US\$1,103 million - followed by Germany with 12.78%, the Netherlands with 8.99%, China with 3.94%, the United Kingdom with 3.89%, and France with 3.13%.

Although the crisis continued in 2020, Cambodia was able to export a total of 4.8 million tons of agricultural products to international markets, of which 218,981 tons<sup>11</sup> comprised cashew nuts, while in 2021, Cambodia exported 937,974.26 tons (an increase of 328.34%). Exports to Vietnam reached 928,926.27 tons, to China 4,552.69 tons, Thailand 4,297.40 tons, India 98.60 tons, Japan 44.15 tons, Korea 21.38 tons, the United Arab Emirates 14.51 tons, the Netherlands 8.21 tons, Bangladesh 7 tons, Lao PDR 4 tons, Switzerland 0.02 tons, Togo 0.01 tons, the Philippines 0.003 tons and France 0.002 tons<sup>12</sup>. While the cashew products of the world's major producers remain static, Cambodia's cashew products could snatch market share from the United States, Germany, Netherlands, China, the United Kingdom, France, Australia, Canada, the United Arab Emirates, and Japan. The upward trend in European demand for cashew nuts continues, while the supply of other grains - such as almonds, hazelnuts, and pistachios – which is insufficient, and these are more expensive. Based on the growth in European consumption, Cambodia needs a long-term vision to promote and increase consumer awareness of the nutritional value of cashew kernels. European consumers prefer white and roasted cashew kernels, which are more tasty than other tree nuts. Consequently, to increase its economic competitiveness and diversification, and to ensure high economic growth and job creation, Cambodia needs to seize this opportunity by strengthening and expanding the processing of cashew products as much as possible - by establishing food safety standards and ensuring that it has the quantity and quality to supply local and international markets.

The National Policy on Cashew 2022-2027 has been formulated and sharpened to respond to the vision of the Royal Government of Cambodia, as well as to ensure that it is consistent with other relevant policy documents and strategies, particularly in line with the RGC's Rectangular Strategy Phase IV. In this regard, and in order to achieve the goal of sustainable development for cashew, this policy focuses on three main strategies: production, processing, and export.

## **2. VISION**

The National Cashew Policy aims to develop cashew production, processing and markets in inclusive competitiveness to ensure sustainability and economic diversification.

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<sup>10</sup> Source: Trade map ITC, data extracted in October, 2020

<sup>11</sup> Source: directive on agriculture, forestry and fisheries situation in 2020 and implementation, dated 8 January 2021

<sup>12</sup> Report on the situation of agriculture, forestry and fisheries in 2021, and the implementation directive dated 6 January 2021 2022

### **3. GOAL AND OBJECTIVES**

The National Cashew Policy aims to transform Cambodia into a major producer and supplier of cashew products for local, regional and global markets.

To achieve the above vision and objectives, the National Cashew Policy has set out three main goals:

- To improve the production and product outputs with competitive quality
- To promote industrialisation to increase the value-added of the cashew harvest and processing by 25% by 2027 and at least 50% by 2032
- To promote exports through market diversification, inter-sectoral export linkages, trade facilitation, production cost reductions, and market advantage.

### **4. STRATEGIES**

To achieve the vision, goals and objectives, the National Cashew Policy focuses mainly on three key strategies:

#### **4.1. Production strategy**

This strategy focuses on improving productivity in the cashew sector, by careful promoting the use of agricultural technological innovation, good agricultural practices, organic farming, a cultivation calendar based on market demand, cultivation zones, improving soil management and utility, strengthening the control and management of different varieties, and improving irrigation and agricultural mechanisation, along with post-harvest technology. In order to maintain sustainable growth in the cashew sector, it is necessary to nurture the uptake of cultivation using high quality varieties (large nuts) that are resistant to damage from pests, climate change, and maximum residue limits (MRLs) of agro-chemicals to comply with the standards of importing countries.

The plan for harvesting, processing, quality control, and risk management must have pre-determined goals in practical cooperation, such as planting programs, post-harvesting methods and production costs. Market demand and supply chains need to be balanced between stakeholders such as farmers, processors and exporters, so that they are encouraged to plan and collaborate in farming contracts.

At the same time, relevant ministries and institutions, the private sector and development partners shall continue to cooperate in conducting capacity building for technical officers, producers (small, medium and large) and agricultural communities on the development of the agriculture sector and the promotion investment from the private sector in the agricultural production chain through the public-private partnership mechanism in finding new markets for cashew products.

#### **4.2. Processing strategy**

This strategy is significant in diversifying products for the value-addition of cashew products, which, in turn, will support the development of the rural economy by transforming farmers into agro-businesses through increasing productivity, reducing production costs, and applying appropriate modern technologies and



competitive quality products to supply the domestic and foreign markets. It will also encourage agricultural cooperatives to become the supply-bases for raw materials to serve and increase agro-processing industries. In addition, the strategy focuses on the following actions, which will enhance the cashew production chain and increase value-added products:

- Encouraging and mobilising domestic and foreign investment, technical assistance and resources, to sustainably promote the development of Cambodia's cashew sector
- Increasing value-added, post-harvest, through the drying, grading, and packaging of raw nuts by deshelling, peeling, and grading for supply to processors and exporters in markets that are high-value targets
- Increasing value-added by supplying processing industries so that finished products such as snacks and ingredients for inclusion with other products, can be produced
- Increasing value-added by producing various processed products to supply to retail stores in the target markets.

Past studies have shown that the Cambodian cashew processing industry can be linked to other relevant sectors to revitalise the basic economy by adding value through processing. Products include roasted cashew kernels, cashew apple vinegar, cashew jam, cashew apple drinks, cashew oil, cashew sauce, cashew milk, cashew apple juice, cashew cream, cashew butter, cashew ice cream, cashew wine/lager and cashew cheese. Raw and roasted kernels are more favoured than other nuts because they are tasty and offer health benefits.

#### **4.3. Export strategy**

Cambodian cashew is a traditional agro-industrial crop consumed by both domestic and global markets. It is considered to be a crop with potential and significant nutritional value. Furthermore, as a raw material, it can be used to produce other products. In order to respond to the new trends in market competition, and to be able to strengthen the excellence of the Cambodian cashew market, the National Cashew Policy has set out the following market and export strategies:

- To expand agro-business in line with market demand, domestically and internationally, through cooperation between the RGC and the private sector
- To encourage the consumption of local cashew products through the organisation of business and investment forums between producers, buyers and consumers, to promote exports
- To facilitate trade in cashew exports through the maintenance of the existing markets and negotiations with new target markets - through all mechanisms - in the region and the world, the development of logistic systems, and the harmonisation of one-stop-service systems
- To improve existing procedures, establishing new mechanisms and infrastructure to promote profitable exports and markets, including import and export clearance. To disseminate information about trade rules and tariff lines to producer communities, traders, exporters and stakeholders by all means such as trade events, business matching, 'buy Cambodian products' campaigns, trademarks, etc.
- To increase the competitive productivity of cashew crops, reducing the production costs of cashew processing by ensuring quality and standards in accordance with market demand

- To promote the export of cashew products through bilateral and multilateral free trade agreements.

## **5. ACTIVITIES PLAN**

In order to achieve the vision, objectives, goals and strategies of this policy, the following activities are planned:

### **5.1. Establishment of supportive mechanisms**

For the sustainable implementation of the National Cashew Policy, it is necessary to concentrate on human resources and to mobilise finance in accordance with the needs relating to the scale of work, with transparency, consistency and links between relevant ministries and institutions, national and international organisations and development partners through the establishment of mechanisms as follows:

5.1.1. The establishment of an inter-ministerial committee to monitor and evaluate the implementation of the National Cashew Policy 2022-2027, as has been designated by the RGC. The committee will be composed of representatives from relevant ministries and institutions, and will have a secretariat under the Ministry of Commerce.

5.1.2. Strengthen the Cashew Federation to mobilise farmers, producers and all stakeholders who will be the supply-base for raw materials under one roof to serve the agro-processing industry. They will have a common vision to achieve the single goal of sustainable development for Cambodia's cashew sector.

5.1.3. Strengthen a Centre of Excellence for sustainable and nutritional agriculture intensification, to implement post-harvest production and the management of cashew nuts in areas with potential, and to link producers with cashew value-chain actors and stakeholders.

5.1.4. Strengthen the capacity of the Cambodian Agricultural Research and Development Institute, the National University of Agriculture and other laboratories to research high-quality and large cashew nut varieties that are resilient to climate change.

### **5.2. Establishment of a legal framework**

In order for the National Cashew Policy to be effectively implemented, ministries and institutions shall formulate legal documents relating to the cashew sector as deemed needed.

### **5.3. Financial support**

The Ministry of Economy and Finance, the National Bank of Cambodia, the Agricultural and Rural Development Bank, and the SME Bank shall examine the feasibility of resolving issues related to financing and should be carried out in accordance with the spirit of the National Cashew Policy. In addition, other sources of funding and support could be sought from development partners and the private sector, as well as funding from other legitimate sources.

### **5.4. Human Resource Development**

To develop human resources to expand the cashew sector, the following ministries and organisations should collaborate: the Institute of Standards of Cambodia; the National Productivity Centre of Cambodia of the Ministry of Industry, Science, Technology and Innovation; the Trade Training and Research Institute of the Ministry of Commerce; the Cambodian Agricultural Research and Development Institute; the National Training Institute of

Agriculture; the General Department of Agriculture of the Ministry of Agriculture, Forestry and Fisheries; the Ministry of Labour and Vocational Training; and other relevant ministries and institutions. These bodies shall determine training programs and research to support the cashew sector, and prepare procedures to determine quality in accordance with national and international standards. Activities should include organising seminars, participating in other events, and setting up local and international study tours.

### **5.5. Infrastructure development**

5.5.1. The creation of a favourable environment for cultivation by building and improving physical infrastructure should be promoted, such as irrigation, electricity and drainage systems.

5.5.2. The construction and improvement of transportation and storage infrastructure should be promoted, from farms connected to warehouses and processing areas, to small roads, waterways, main roads, and bridges.

5.5.3. The feasibility of constructing and improving strategic transport routes that reduce the distance from processing areas/factories to ports or export gates (national roads, railways, waterways, and airways) should be examined. Strengthening system efficiency logistics, should also be considered.

5.5.4. The recycling of waste from cashew products into useful multi-products - by implementing laws related to better environmental impact management - should be nurtured.

### **5.6. Project implementation**

This policy shall be implemented in accordance with national strategies and other policies to effectively complement the development of the cashew sector.

The implementation plans of this policy are divided into the following activity clusters:

#### **5.6.1. Cashew production**

5.6.1.1. The Ministry of Agriculture, Forestry and Fisheries shall disseminate information about new discoveries to farmers through the website of the Agricultural Information and Documentation Centre, or on social media, by setting up a platform through which farmers can share their ideas and experiences.

5.6.1.2. The Ministry of Agriculture, Forestry and Fisheries shall continue to conduct scientific research on cashew varieties, especially new varieties that are in line with Cambodia's ecosystem and the needs of its target markets.

5.6.1.3. The Ministry of Agriculture, Forestry and Fisheries shall implement the development and improvement of annual yield measurement methods, based on the latest available survey data, such as field yields, production costs, the utility of agri-inputs, the level of investment, the age of the cashew trees, the varieties planted, new plantings, and pests. This would help to increase cashew production, as well as verify the yields, and identify areas for potential improvement.

5.6.1.4. The Ministry of Agriculture, Forestry and Fisheries, and the Ministry of Environment shall strengthen the implementation of existing regulations, and assess environmental risks in the management of agricultural raw materials, especially pesticides, in order to optimise cashew productivity in accordance with technical standards.

5.6.1.5. The Ministry of Agriculture, Forestry and Fisheries shall increase production and productivity and enhance the safety of farmers and farm workers through technical training, both theoretical and practical, to improve the quality of services, the implementation of good agricultural practices and organic farming, to be more accurate and effective in the cashew sector.

5.6.1.6. The Ministry of Agriculture, Forestry and Fisheries, and the Ministry of Commerce shall recommend the establishment of collective production groups, and a clear data collection study, to identify the sources of Cambodian cashew products in the market. The Ministry of Agriculture, Forestry and Fisheries shall guide and coordinate the establishment of agricultural communities focusing on cashew crops, and strengthen them to function well.

5.6.1.7. The Ministry of Interior, the Ministry of Agriculture, Forestry and Fisheries, and the Ministry of Commerce shall coordinate the establishment of a Cashew Association and Federation.

5.6.1.8. The Ministry of Commerce, the Ministry of Agriculture, Forestry and Fisheries, and the sub-national administrations shall strengthen contract farming - to ensure the supply chain by increasing value-added during and post-harvest season through links between agricultural associations, communities, farmer groups, and local processors - for commercialisation in Cambodia.

5.6.1.9. The Ministry of Commerce, and the Ministry of Agriculture, Forestry and Fisheries shall strengthen the image of cashew products by improving the quality and taste, and by controlling the use of chemical inputs in accordance with technical standards in production.

5.6.1.10. The Ministry of Agriculture, Forestry and Fisheries shall monitor and promote good agricultural practices (CamGAP) and organic farming for cashew crops.

5.6.1.11. The Ministry of Economy and Finance, the Rural Development and Agriculture Bank, and the SME Bank shall create budget packages to mitigate difficulties faced by farmers and processing plants in the event of natural disasters, epidemics, border closures, market disruptions, and flooding at harvest time.

5.6.1.12. The National Bank of Cambodia should further encourage banks and financial institutions to increase agricultural loan products, or adjust existing products to facilitate the lowering of interest rates.

5.6.1.13. The Ministry of Water Resources and Meteorology shall examine the possibility of constructing irrigation systems and other water sources to serve cashew crops.

5.6.1.14. The Cambodian Mine Action and Victim Assistance Authority in charge of demining and mine action, shall prioritise demining plans and the removal of unexploded ordnance to expand cashew plantations.

5.6.1.15. The Ministry of Rural Development and the sub-national administrations shall include the cashew sector in their strategic development plans and investment programs, and cooperate with local communities and development partners to build and improve access roads to farms, according to the contribution ability.

## **5.6.2. Cashew processing**

5.6.2.1. The Council for the Development of Cambodia, the Ministry of Commerce, and the Ministry of Industry, Science, Technology and Innovation shall encourage the private sector to invest in processing cashew products for the domestic and export markets.

5.6.2.2. The Ministry of Industry, Science, Technology and Innovation, the Ministry of Environment, and the Council for the Development of Cambodia shall encourage cashew processing factories to develop their cashew production capacity with the transfer of processing industry technology. This would improve capacity for food production and the processing of cashew waste.

5.6.2.3. The Ministry of Agriculture, Forestry and Fisheries shall prepare guidelines and disseminate these to farmers and farm owners giving guidance on how to dry and store cashew nuts properly, in accordance with technical conditions, to ensure good quality and safe cashew products.

5.6.2.4. The Ministry of Commerce, the Council for the Development of Cambodia and relevant institutions shall study economic benefits and encourage the private sector to establish cashew processing areas within, or near to, cashew plantations, or in industrial parks located in provinces with potential for domestic supply from the cashew production chain. Situated in one location, the establishment of such a processing area could add great value to the rural economy.

5.6.2.5. The Ministry of Industry, Science, Technology and Innovation shall encourage the processing and management of cashew products for use as final products, or as raw materials, to produce various products.

5.6.2.6. The Ministry of Environment, the Ministry of Industry, Science, Technology and Innovation, relevant ministries and sub-national administrations shall provide technical advice to cashew processing plants to effectively manage waste, prevent negative environmental impacts, and increase the value-added from cashew processing waste.

5.6.2.7. The Ministry of Industry, Science, Technology and Innovation shall study and create standards relating to cashew products, and prepare procedures for recognising and implementing these standards for cashew products according to the needs of importing countries. This would ensure the quality and sustainability of Cambodian cashew processing by providing technical support and building the capacity of processors to obtain compliance certification.

5.6.2.8. The Ministry of Industry, Science, Technology and Innovation shall guide and facilitate cashew processing enterprises and factories to enhance export productivity, and ensure quality and safety to meet minimum demands in accordance with the quality control systems or standards, and international food safety and management systems or equivalent systems, certified by accredited certification bodies.

5.6.2.9. The Ministry of Economy and Finance shall examine the possibility of providing incentives through exemptions or reductions in income tax, tax on processed cashew products, and value-added tax, to legal cashew operators who provide direct benefit to farmers.

5.6.2.10. The Ministry of Economy and Finance shall examine the feasibility of providing necessary incentives to the private sector, for example, the construction of cashew nut warehouses at key strategic locations for the storage of cashew nuts for processing.

5.6.2.11. The Ministry of Commerce and the Council for the Development of Cambodia shall mobilise investors to build cashew nut drying yards or dryers, and warehouses at key strategic locations for managing the harvesting and storage of cashew nuts for processing.

5.6.2.12. The Ministry of Mines and Energy, and the Electricity Authority of Cambodia shall examine the possibility of facilitating the reduction in electricity prices for consumers in the cashew sector.

### **5.6.3. Cashew market and export**

5.6.3.1. The Ministry of Commerce and the Ministry of Agriculture, Forestry and Fisheries shall strengthen market information and data collection services involving farmers and the public through various media to facilitate market monitoring.

5.6.3.2. The Ministry of Commerce shall facilitate the establishment of cashew associations or federation to gather together the private sector, exporters, processors and operators involved in the cashew business.

5.6.3.3. The Ministry of Commerce shall examine market trends, regional competition and value chains in order to promote the development of the cashew sector in a way that is consistent and inclusive.

5.6.3.4. The Ministry of Commerce shall continue to negotiate with countries that are targets for exports on the topics of tariff exemptions or reductions, quotas and trade facilitation, especially the effective implementation of the One Window Service Office (OWSO) mechanism.

5.6.3.5. The Ministry of Agriculture, Forestry and Fisheries shall promote negotiations with target countries about facilitating the implementation of sanitary and phytosanitary rules, building the capacity of Cambodian exporters and stakeholders to be able to comply with sanitation and phytosanitary regulations, and by inviting the private sector to participate in the provision of sanitation and phytosanitary services.

5.6.3.6. The Ministry of Commerce and the Ministry of Industry, Science, Technology and Innovation shall promote and disseminate the benefits of branding and packaging with quality and standards.

5.6.3.7. The Ministry of Commerce shall promote and build good branding reputation for cashew products through all means. This should be widely disseminated to increase market competitiveness.

5.6.3.8. The Ministry of Industry, Science, Technology and Innovation shall facilitate the certification provision mechanism for food hygiene, and strengthen laboratory capacity in accordance with international standards. The operation of such a laboratory could involve a public-private partnership.

5.6.3.9. The Ministry of Commerce, the Ministry of Posts and Telecommunications, and the National Bank of Cambodia shall promote and facilitate the development of new digital technologies for electronic business operations.

5.6.3.10. The Ministry of Commerce shall develop new digital mechanisms and techniques to promote well-known and confident marketing platforms to sellers and buyers.

5.6.3.11. The Ministry of Commerce shall organise a cashew business forum to promote Cambodia's cashew products and connect the private sector to international business networks.

5.6.3.12. The Ministry of Commerce shall develop a campaign to promote the use of local cashew products.

5.6.3.13. The Ministry of Tourism, the Ministry of Agriculture, Forestry and Fisheries, the Ministry of Commerce and the sub-national administrations shall promote and establish agri-tourism markets for cashew products on site.

5.6.3.14. The Ministry of Public Works and Transport shall continue to build the necessary physical infrastructure to connect factories, enterprises, and special economic zones to the ports and export gates.

5.6.3.15. The Ministry of Commerce, the Ministry of Agriculture, Forestry and Fisheries, the Ministry of Industry, Science, Technology and Innovation, and the Ministry of Economy and Finance, shall coordinate export procedures to reduce costs and increase the competitiveness of Cambodia's cashew products.

5.6.3.16. The Ministry of Public Works and Transport, the Ministry of Economy and Finance, and other relevant ministries and sub-national administrations shall examine the possibility of reducing service fees to provide smooth and expeditious processing. They should also examine the possibility of building standard warehouses for all agricultural products.

## 6. MONITORING AND EVALUATION

To effectively implement the National Cashew Policy, it is necessary to have a system for monitoring and evaluation, and to put forward proposals to improve implementation, by focusing on:

- The establishment of an inter-ministerial committee to monitor and evaluate implementation by verifying the goals and action plans of the National Cashew Policy
- Identifying indicators to measure the degree to which the implementation of the action plan has taken place
- The Economic and Financial Policy Committee of the Ministry of Economy and Finance is responsible for monitoring and evaluating the National Cashew Policy so that it is consistent and aligned with other relevant policies and strategies
- The establishment of a mechanism to collect information, monitor, amend and prepare an evaluation report on the implementation of this policy, as well as the direction for further implementation.

## 7. CONCLUSION

Cashew is considered one of the priority crops among other potential crops, providing an important source of income and contributing to the growth of national income. Cambodia produces a significant amount of cashew products, most of which are raw nuts exported to neighbouring countries for processing, and, from there, to be exported to other consumer countries. Exports of raw cashew nuts have resulted in the loss of many potential jobs and added-value in Cambodia. In this regard, the Royal Government of Cambodia has set out the National Cashew Policy in line with its Rectangular Strategy Phase IV. This is designed to promote competitiveness for both production and quality, diversification, processing, exporting, and value-addition to the whole value chain of stakeholders. It will support existing actors and attract greater investment, as well as maintaining existing markets and seeking new ones to support sustainability. At the same time, the participation of relevant ministries and institutions in implementing the National Cashew Policy, defined in a clear and ambitious vision, is necessary to seize the competitive opportunities in the market, and to export Cambodia's cashew kernels to regional and the world markets. This can be achieved by reducing the export of raw cashew nuts in order to create jobs within Cambodia, and to add more value to people's labour, to reduce poverty and migration, and to boost national economic growth.

## GLOSSARY

The key terms used in the National Cashew Policy 2022-2027 are defined as follows:

Contract farming	Refers to an agreement between farmers and processing and/ or marketing firms for the production and supply of agricultural products under forward agreements, frequently at predetermined prices
Agro-business	Refers to the business sector encompassing farming and farming-related commercial activities
Agro-industry	Refers to the large-scale production, processing, and packaging of food using modern equipment and methods
Good branding	Refers to the creation of a proprietary image that is visible, interesting, reasonable, and has a cultural character that makes customers think of, and distinguish, Cambodian cashew products
Value Chain	Refers to a series of consecutive steps that go into the creation of a finished product, from its initial design to its arrival at the customer's door
Supply Chain	Refers to a collection of suppliers' activities for production, processing and export
Cashew Nut in Shell	Refers to cashew nuts that are peeled from cashews
Cashew Nut Shelled	Refers to cashew nuts that are peeled from the fruit and peeled
Continuity	Refers to the continuous probability or possibility of continuous use of economic or financial resources, regardless of the maintenance or expansion of quality and progress



Inclusiveness	Refers to measures or policies that include or enable all stakeholders to benefit economically from the process of implementing a project, program or policy
Harmonised System (HS)	Refers to the classification of goods in the international trading system established by the World Customs Organization
Ecosystem	Refers to a geographic area where plants, animals, and other organisms, as well as weather and landscape, work together to form a bubble of life
Commercialisation	Refers to the process of introducing a new product or production method into commerce—making it available to the market
Diversification	Refers to the process of shifting an economy away from a single income source towards multiple sources from a growing range of sectors and markets
Centre of Excellence	Refers to the centre established by the Ministry of Agriculture, Forestry and Fisheries as a place to train and share knowledge about agricultural techniques. Its aim is to build the capacity of farmers to develop agriculture through new technologies to achieve efficiency and effectiveness
Mechanisation	Refers to the process of introducing a machine to do something that used to be done by human or animal labour
Organic by Default	Refers to natural farming methods using new soil on which chemical fertilisers have never been used: only naturally processed fertilisers have been applied in

accordance with the organic standards set by the market order

Cashews

Refers to cashew crops, including stems, leaves, fruits, cashew nuts, kernels, apple, shell, and, testa/skin,

Industrialisation

Refers to a transformation away from an agricultural- or resource-based economy, towards an economy based on mechanised manufacturing

Annex 1: Matrix of National Cashew Policy Measures and Action Plan

Project implementation process	Challenges	The reason	Activities	Responsible institution
Cashew Production	<ul style="list-style-type: none"> <li>- Low production yield and quality</li> <li>- High cost of production value chain</li> </ul>	<ul style="list-style-type: none"> <li>- Farmers' knowledge still limited.</li> <li>- Lack of access on social media by organising platform to gain information and participation in sharing experience with the latest technology.</li> <li>- Cashew seeds/seedlings are not yet analysed and farmers are growing based on market demand.</li> <li>- The management of agro-input use remains limited.</li> </ul>	<ul style="list-style-type: none"> <li>- Disseminate new discoveries to farmers through the website of the Agricultural Information and Documentation Centre or on social media, setting up a platform where farmers can share their ideas and experiences.</li> <li>- Continue to conduct scientific research on cashew varieties, especially new varieties that are in line with Cambodia's ecosystem, climate change, and target market needs.</li> <li>- Implement the development and improvement of annual production measurement methods based on the latest available survey data - plantation yields; production costs; agro-input use; the investment level; the age of cashew trees; newly planted varieties; new plantings; and pests - in order to increase cashew production, as well as</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> </ul>

			calculate production and identify potential for improvement.	
	- Lack of techniques in managing stock warehouse after harvest.		- Prepare guidelines and disseminate to farmers and farm owners how to dry, grade, and store cashew nuts properly in accordance with technical conditions to ensure good quality and safety.	- Ministry of Agriculture, Forestry and Fisheries
- Techniques for using fertilisers and agro-chemicals are still limited	- Lack of full implementation of regulations and measures.		- Strengthen the implementation of existing regulations and assess environmental risks in the management of raw agricultural materials, especially pesticides, in order to optimise cashew productivity in accordance with technical standards.	- Ministry of Agriculture, Forestry and Fisheries - Ministry of Environment
	-		- Increase productivity and protect the safety of farmers and farm workers through technical training, both theoretical and practical, to improve the quality of services, good agricultural practices and organic farming to be more accurate and effective in the cashew sector.	- Ministry of Agriculture, Forestry and Fisheries
- Lack of management on cashew origin	- The identification and establishment of collective producer groups not yet clearly set.		- Recommend the establishment of a collective production group and a clear data collection study to identify the source of Cambodian cashew products in the market.	- Ministry of Agriculture, Forestry and Fisheries - Ministry of Commerce

			<ul style="list-style-type: none"> <li>- Guide and coordinate the establishment of agricultural communities based on cashew crops and strengthen agricultural communities to function well.</li> <li>- Coordinate the establishment of a Cashew Association and Federation.</li> <li>- Strengthen farming contracts to ensure the supply chain by increasing value-added both during and post-harvest season through links between agricultural associations, farmer groups, and local processors for commercialisation in Cambodia.</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Interior</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Commerce</li> <li>- Ministry of Commerce</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Sub-national administrations</li> </ul>
<ul style="list-style-type: none"> <li>- A specific standard has not yet been set for cashew products</li> </ul>	<ul style="list-style-type: none"> <li>- Low quality of inputs in cashew production.</li> </ul>	<ul style="list-style-type: none"> <li>- Strengthen the reputation of cashew products by improving the quality, taste, and the use of chemical inputs in accordance with technical standards in production.</li> <li>- Monitor and promote good agricultural practices (CamGAP) and organic farming for cashew crops.</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Commerce</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> </ul>	
<ul style="list-style-type: none"> <li>- Lack of investment in the cashew production chain</li> </ul>	<ul style="list-style-type: none"> <li>- Climate change leads to additional costs in the cashew production chain.</li> </ul>	<ul style="list-style-type: none"> <li>- Create a budget package to mitigate the difficulties of farmers and processing plants in the event of natural disasters, epidemics, border</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Economy and Finance</li> <li>- Agricultural and Rural Development Bank</li> </ul>	

		- Financing does not meet the needs of farmers and relevant stakeholders.	closures, market disruptions, and flooding at harvest time.	- SME Bank
			- Encourage banks and financial institutions to increase agricultural loan products or to adjust existing products to facilitate and lower interest rates.	- National Bank of Cambodia
	- Lack of irrigation systems	- Cultivation of cashew crops depends on nature or conventional production.	- Examine the possibility of constructing irrigation systems and other water sources to supply cashew crop production.	- The Ministry of Water Resources and Meteorology
	- The geographical location of the plantations is in remote and risky areas	- Mines and unexploded ordnance have not been cleared.	- Prioritise demining plans to clear mines and unexploded ordnance for cashew plantations.	- Cambodian Mine Action and Victim Assistance Authority
	- Lack of infrastructure to connect to cashew plantations	- Local development budgets are still limited.	- Include the cashew sector in strategic development plans and investment programs and cooperate with local communities and development partners to build and improve access roads to farms in accordance with the resources of subsidy fund collections.	- Ministry of Rural Development - Sub-national administrations
<b>Cashew Processing</b>	- The capacity of processing factories is not competitive	- Lack of capital investment in cashew processing.	- Encourage the private sector to invest in processing cashew products for the domestic and export markets.	- Council for the Development of Cambodia - Ministry of Commerce

	<p>in terms of diversification and value-added</p>	<p>- Encourage cashew processing factories to develop cashew processing capacity with the transfer of processing industry technologies for food production and cashew waste.</p> <p>- Study the economic benefits and encourage the private sector to establish cashew processing areas, which are located within cashew plantations or in industrial parks, in one location, in provinces that have potential for domestic supply. The establishment of such a processing area could add great value to the rural economy.</p> <p>- Encourage the processing and management of cashew products for use as final products or semi-products to produce various final products.</p> <p>- Provide technical advice about cashew processing plants to effectively manage waste, lower environmental impacts, and increase value-added from recycling cashew processing waste.</p>	<ul style="list-style-type: none"> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Ministry of Environment</li> <li>- Council for the Development of Cambodia</li> <li>- Ministry of Commerce</li> <li>- Council for the Development of Cambodia</li> <li>- Relevant Institutions</li> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Ministry of Environment</li> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Relevant Ministries</li> <li>- Sub-national Administrations</li> </ul>
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	<p>- Quality of cashew products does not meet technical specifications and standards</p>	<p>- No standard specifications of processed cashew kernels have been established for processed cashew kernels.</p>	<p>- Study and create standards related to cashew kernels, prepare procedures for recognising and implementing these standards according to the needs of importing countries. This would boost the quality and sustainability of Cambodian cashew processing by providing technical support and building capacity for processors so that they can obtain food standard certificates.</p> <p>- Guide and facilitate cashew processing enterprises and factories to enhance export productivity, ensure quality and food safety to a minimum level in accordance with the quality control system or standards, international food safety and management system, or equivalent systems certified by an accredited certification body.</p>	<p>- Ministry of Industry, Science, Technology and Innovation</p> <p>- Ministry of Industry, Science, Technology and Innovation</p>
<p>- Production cost is still high, so it is difficult to compete in the market</p>	<p>- Unregistered processing plants have not been given incentives to register.</p>	<p>- Examine the possibility of providing incentives through the exemption of, or reduction in, income tax, tax on processed cashew products, and value-added tax, to legal cashew operators who are able to provide direct benefits to farmers.</p>	<p>- Ministry of Economy and Finance</p>	
<p>- Not enough warehouses for storage during and</p>	<p>- No incentives have been offered to investors to invest in building drying yards or</p>	<p>- Examine the feasibility and provide the private sector with the necessary incentives to invest in, for instance, the construction of cashew</p>	<p>- Ministry of Economy and Finance</p>	



	after post-harvesting	drying cabinets and warehouses for year-round processing.	warehouses at key strategic locations to store cashew products for year-round processing. - Mobilise investors to build drying yards and warehouses at key strategic locations for managing the harvest and the storage of cashew products for processing.	- Ministry of Commerce - Council for the Development of Cambodia
	- Electricity cost is still high	- The electricity distribution network is insufficient.	- Examine the possibility of facilitating a reduction in electricity prices for consumers in the cashew sector.	- Ministry of Mines and Energy - Electricity Authority of Cambodia
<b>Cashew Market and Export</b>	- Lack of information about the cashew market	- A systematic market analysis service and a mechanism to share information about the market situation with stakeholders, has not yet been prepared.	- Strengthen market information and data collection services for farmers and the public through various media so that they can monitor the market situation.	- Ministry of Commerce - Ministry of Agriculture, Forestry and Fisheries
	- No legal Cashew Trade Federation	- Lack of management to gather cashew business operators and stakeholders together to form an association or federation for the cashew business.	- Facilitate the establishment of cashew trade associations or federations to gather together the private sector, exporters, processors and operators involved in the cashew business.	- Ministry of Commerce
	- Commercial barriers	- Not enough trade agreements with export target countries.	- Examine market trends, regional competition, and value-chains in order to promote the	- Ministry of Commerce

			<p>development of the cashew sector so that it is consistent and inclusive.</p> <ul style="list-style-type: none"> <li>- Continue to negotiate with export target countries about tariff exemptions or reductions, quotas, and trade facilitation, especially the effective implementation of the One Window Service Office (OWSO) mechanism.</li> <li>- Promote negotiations with target countries about facilitating the implementation of sanitary and phytosanitary rules, and build the capacity of Cambodian exporters and stakeholders to be able to comply with sanitation and phytosanitary standards. This can be achieved by encouraging and opening up the private sector to participate in the provision of sanitation and phytosanitary services.</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Commerce</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Commerce</li> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Ministry of Commerce</li> </ul>
<ul style="list-style-type: none"> <li>- Products are not properly labelled, packaged or branded</li> </ul>	<ul style="list-style-type: none"> <li>- Lack of awareness about the benefits of branding and packaging.</li> <li>- Lack of understanding about the value of establishing a brand.</li> </ul>	<ul style="list-style-type: none"> <li>- Promote and disseminate information about the benefits of branding and packaging with quality and standards.</li> <li>- Promote and build a good branding reputation about products, using all means to widely disseminate this brand, to increase market competitiveness.</li> </ul>	<ul style="list-style-type: none"> <li>- Ministry of Commerce</li> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Ministry of Commerce</li> </ul>	

	<p>- No specific recognition of the quality of cashew products</p>	<p>- Lack of laboratories that operate in line with international standards.</p>	<p>- Facilitate the certificate provision mechanism for food product hygiene and strengthen the laboratory capacity in accordance with international standards. The operation of this laboratory may involve a public-private partnership.</p>	<p>- Ministry of Industry, Science, Technology and Innovation</p>
<p>- The use of new digital technologies for electronic business operations is still limited</p>	<p>- Lack of human resources and techniques relating to the establishment of digital mechanisms.</p>	<p>- Promote and facilitate the development of new digital technologies for electronic business operations.</p> <p>- Need to develop new digital mechanisms and techniques to promote a well-recognised and confident marketing platform to sellers and buyers.</p>	<p>- Ministry of Commerce</p> <p>- Ministry of Posts and Telecommunications</p> <p>- National Bank of Cambodia</p> <p>- Ministry of Commerce</p>	
<p>- Lack of market diversification in respect of cashew products</p>	<p>- Cashew business is not widely known.</p> <p>- Lack of trust in the consumption of Cambodian products</p> <p>- The establishment of agro-tourism relating to cashew products has not yet been carried out.</p>	<p>- Organise a cashew business forum to promote Cambodia's cashew products and connect the private sector to international business networks.</p> <p>- Launch a campaign about the use of local cashew products.</p> <p>- Promote and establish agro-tourism markets for cashew products on site.</p>	<p>- Ministry of Commerce</p> <p>- Ministry of Commerce</p> <p>- Ministry of Tourism</p> <p>- Ministry of Agriculture, Forestry and Fisheries</p> <p>- Ministry of Commerce</p>	

	<ul style="list-style-type: none"> <li>- Limited connectivity of infrastructure</li> <li>- The process to request export documents is still not easily navigated</li> </ul>	<ul style="list-style-type: none"> <li>- The cost of transport is high and time-consuming.</li> <li>- Cost reductions relating to export, and efficiency of the export procedure are still not sufficient.</li> </ul>	<ul style="list-style-type: none"> <li>- Continue to build the necessary physical infrastructure to connect factories, enterprises, and special economic zones to ports and export gates.</li> <li>- Coordinate export procedures to reduce costs and increase the competitiveness of Cambodia's cashew products.</li> <li>- Examine the possibility to reduce service fees, and to conduct the export process with speed and efficiency. The possibility of building standard warehouses for all agricultural products should also be explored.</li> </ul>	<ul style="list-style-type: none"> <li>- Sub-national Administrations</li> <li>- Ministry of Public Works and Transport</li> <li>- Ministry of Commerce</li> <li>- Ministry of Agriculture, Forestry and Fisheries</li> <li>- Ministry of Industry, Science, Technology and Innovation</li> <li>- Ministry of Economy and Finance</li> <li>- The Ministry of Public Works and Transport</li> <li>- Ministry of Economy and Finance</li> <li>- Relevant Ministries</li> <li>- Sub-National Administrations</li> </ul>
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## Annex 2: Statistic Table

Table A: Data Ranking Countries for Cashew Nut-in-Shell by Size of Imports (HS 080131)

Rank	Importing Countries	Import Size in 2016	Import Size In 2017	Import Size In 2018	Import Size In 2019	Import Size In 2020
	The world	2 864.88	4 089.19	3 694.80	2 855.93	1 349.31
1	India	1 180.85	1 450.60	1 714.07	1 097.66	1 086.93
2	Vietnam	1 626.83	2 523.14	1 900.26	1 668.41	197.33
3	Saudi Arabia	11.06	25.93	21, 19	25,47	23.94
4	China	0.73	11.69	9.90	18,77	15.88
5	Belgium	5.10	5.54	4.73	3.70	3.17
6	United Arab Emirates	0.13	0.08	0.08	0.21	2.30
7	Holland	0.20	0.10	0.29	1.03	1.41
8	United States of America	1.14	2.62	1.34	1.29	1.17
9	United Kingdom	1.02	2.59	2.69	1.43	0.81
10	South Africa	0.17	2.60	1.41	0.29	0.58
	(.....)					
27	Cambodia	0	0.04	0.39	0.12	0.19
43	Thailand	0.05	0.19	0.16	0.04	0.03

Data source: Trade Map ITC, data extracted in October 2020

**Table B:** Data Ranking Countries Exporting Cashew Nut-in-Shell by Size of Exports (HS 080131)

Rank	Exporting Countries	Export Size in 2016	Export Size In 2017	Export Size In 2018	Export Size In 2019	Export Size In 2020
	The world	2 622.04	2 803.61	2 543.92	1 861.01	1 286.35
1	Tanzania	317.63	524.24	107.21	221.40	221.48
2	Benin	37.97	76.59	128.72	69.74	180.50
3	Ghana	981.16	253.20	455.75	222.37	141.68
4	Guinea-Bissau	176.26	186.85	167.80	122.75	128.54
5	Ivory Coast	792.09	1 161.92	1 054.95	730.84	106.68
6	Indonesia	100.26	112.58	84.35	121.03	102.36
7	Nigeria	28.45	63.85	161.96	73.10	90.17
8	Mozambique	15.78	31.36	14.82	30.26	44.74
9	United Arab Emirate	0.04	0.06	0.29	0.58	42.88
10	Senegal	9.42	3.38	33,16	60.48	38.64
	(.....)					
16	Vietnam	0.57	1.08	0.86	3.83	17.91
18	Cambodia	0.29	0.67	2.26	6.46	7.22
19	Thailand	0.38	5.52	4.72	2.80	4.33

Data source: Trade Map ITC, data extracted in October, 2020

**Table C:** Data Ranking Countries' Imports of Cashew-Nut-Shelled Countries by Size (HS 080132)

Rank	Exporting Countries	Imported Size in 2016	Imported Size In 2017	Imported Size In 2018	Imported Size In 2019	Imported Size In 2020	Market Share 2020 (%)
	The world	3 750.15	4 794.68	4 704.76	4 411.37	3 835.31	100
1	United State of America	1 235. 18	1 580.53	1 464.28	1 200.70	1 103.24	28.76
2	Germany	402.29	549.40	494.72	477.29	490.15	12.78
3	Holland	333.12	438.23	383.77	312.26	341.49	8.90
4	China	19.57	46.91	90.96	165.38	151.17	3.94
5	United Kingdom	173.65	216.96	199.60	177.49	149.42	3.89
6	France	84.30	113.93	128.12	112.73	119.99	3.13
7	Australia	130.57	149.17	123.80	116.52	108.94	2.84
8	Canada	105.59	120.26	129.88	115.59	94.94	2.47
9	United Arab Emirate	167.12	196.17	171.28	139.29	90.39	2.36
10	Japan	70.79	107.71	109.20	93.083	90.28	2.35

Data source: Trade Map ITC, data extracted in October, 2020

**Table D:** Data Ranking Countries' Exports of Cashew Nut-Shelled by Size (HS 080132)

Rank	Exporting Countries	Export Size in 2016	Export Size In 2017	Export Size In 2018	Export Size In 2019	Export Size In 2020	Market Share 2020 (%)
	The world	4 433.42	5 494.88	4 931.43	4 666.74	3 993.38	100
1	Vietnam	2 732.52	3 385.09	3 128.96	2 941.54	2 633.21	65.94
2	India	730.90	942.41	666.43	564.57	404.23	10.12
3	Holland	242.50	302.77	304.09	248.28	271.24	6.79
4	Germany	133.74	169.28	179.61	174.39	200.23	5.01
5	Brazil	129.59	114.09	116.09	120.07	90.67	2.27
6	Indonesia	60.91	58.57	53.83	55.63	43.91	1.10
7	Ivory Coast	61.07	70.18	95.82	66.37	36.57	0.91
8	Belgium	32.49	48.46	52.73	73.64	29.08	0.73
9	Mozambique	13.41	11.20	1.88	56.96	28.94	0.72
10	United State of America	24.80	30.35	22.77	20.75	19.73	0.49
	(.....)						
18	Thailand	10.15	14.74	14.82	13.55	11.48	0.29
34	Cambodia	0.03	0.03	0.67	1.59	2.46	0.06

Source: Trade Map ITC, data extracted in October, 2020



**Table E:** Data Ranking Countries' Size of Cashew Harvesting Area in 2019

Rank	Countries	Harvest area (Hectare)	Production in MT per hectare
1	Ivory Coast	1 913.073	0.41
2	India	1 105.000	0.67
3	Tanzania	980.363	-
4	Benin	573.204	0.35
5	Indonesia	496.331	0.27
6	Brazil	426.417	0.33
7	Guinea Bissau	279.610	0.59
8	Boronia	276.365	1.03
9	Vietnam	276.365	1.03
10	Cambodia*	165.670	1.46
11	Thailand	121.36	1.49

Source: - The Food and Agriculture Organization of the United Nations (FAO)

- Ministry of Agriculture, Forestry and Fisheries

**Table F:** Data Ranking Countries According to Cashew Nut-in-Shell Prices (HS 0801.31)

Exporting country	Unit Price in US\$/MT				
	2016	2017	2018	2019	2020
World	1 728	-	1 302	1 113	1 244
Tanzania	1 460	1 591	1 528	1 436	1 581
Benin	520	915	1 256	755	1 088
Ghana	6 071	1 323	1 631	941	1 266
Guinea Bissau	909	1 126	1 136	1 398	1 281
Ivory Coast	1 289	1 913	1 612	1 200	1 152
Indonesia	1 705	2 052	1 658	1 486	1 323
Nigeria	-	-	444	941	1 000
Mozambique	1 359	1 488	1 570	1 227	1 187
United Arab Emirates	603	939	6 000	8 944	1 109
Senegal	1 022	2 422	1 461	931	950
Cambodia	1 622	1 702	2 074	1 979	1 724
Vietnam	2 379	3 347	9 920	3 489	4 773
Thailand	1 579	1 822	987	702	817

Source: Trade Map ITC, data extracted in October, 2020

**Table G:** Data Ranking Countries According to Cashew Nut-Shelled Prices (HS 0801.32)

Exporting country	Unit Price in US\$/MT				
	2016	2017	2018	2019	2020
World	7 902	9 433	11 109	6 756	6 761
Vietnam	8 199	9 988	12 267	7 162	6 602
India	8 796	10 658	9 977	8 275	7 833
Holland	8 506	10 104	10 664	8 443	7 991
Germany	9 581	11 469	12 414	10 118	9 545
Brazil	8 313	9 987	9 311	7 098	5 866
Indonesia	6 240	9 886	9 019	7 419	6 480
Ivory Coast	7 464	8 620	9 842	5 914	5 876
Belgium	8 518	10 456	9 958	7 920	5 933
Mozambique	5 924	5 500	7 625	5 729	5 729
United State of America	5 910	6 764	8 588	7 503	6 085
Cambodia	7 250	681	7 063	4 240	5 240
Thailand	7 064	11 144	10 535	9 803	9 764
Singapore	8 388	9 655	10 936	9 585	8 742

Source: Trade Map ITC, data extracted in October, 2020

**Table H:** Data Relating to Cashew Nut Manufacturing and Processing Enterprises in Cambodia

No	Company Name	Owner Name	Address	Investment Capital			
				Fixed	Total	Unit	Quantity
1	SME Cashew Processing Enterprise	Mrs. Mok Sreydy	Korkos village, Trapeang Preah commune, Prey Chor district, Kampong Cham province	250 000	500 000		
2	Processed Cashew Nuts	Mrs. Inn Laihout	Trapeang Arak village, Chey commune, Kampong Svay district, Kampong Thom Province	56 280	104 530	Ton	60
3		Mrs. Ly Sochin	Krong Svay village, Svay Pea commune, Mok Kampol district, Kandal province	113 000	208 000	Ton	100
4	Processing and packaging all types of grains	Mr. Choung Seanghak	Vealbei Chakkreyheng village, kranhoung commune, Snoul district, Kratie province	2 000	97 000	Kg	60
5	Cesan Agro	Mr. Chou Ke Seak	Khoun village, Kos commune, Veungesai district, Rattanakiri province	102 340	105 340		
6	Cashew Processing	Mr. Xia JinYou	Pachoun village, Ekphea commune, Ouchum district, Rattanakiri province	180 000	220 000		
7	Vithey Cashew Nuts (Cambodia)	Mr. Eng Mengtraï	Samrong Tboung village, Treak commune, Memot district, Tboung Khmom province	85 000	245 000	Ton	1 200
8	Cashew Nut Handicraft	Mr. Im Serey	1 <sup>st</sup> village, Vealvong commune, Kampong Cham town, Kampong Cham province	2 000	18 750	Ton	1 562.20
9	Cashew Nut Handicraft	Mrs. Choun Sreystros	Tasen village, Sotin commune, Preychor district, Kampong Cham province	730	3 000	Ton	250
10	Cashew Nut Handicraft	Mrs. Leung Manut	Taoung village, Taoung commune, Chamkar Leu district, Kampong Cham province	2 600	8 260	Kg	688.33

11	Cashew Nut Handicraft	Mrs. Oeurn Mouycheng	Trapeang Chhouk village, Meas Chrey commune, Steung Trong district, Kampong Cham province	1 000	5 215	Kg	434.58
12		Mr. Chin Boran	Sangkat Chamchoav, Khan Porsenchey, Phnom Penh	6 570	11 570		

Source: Ministry of Industry, Science, Technology and Innovation

**Table I:** Processing Companies Registered with the Council for the Development of Cambodia (CDC)

No	Company Name	Description	Investment Capital (US\$)	Location
1	Tong Min Group Engineering Co.,Ltd.	Agro-Industrial crop (Rubber, Cashew) and Processing Factory	18 575 961	Kratie district, Kratie province
2	Agro Star Investment Co.,Ltd	Agro-Industrial crop (Rubber, Cashew) and Processing Factory	285 000	Cheung Prey district, Kampong Cham province
3	DauTu Saigon-Binh Phuoc (SBK) Co.,Ltd	Agro-Industrial crop (Rubber, Cashew)	16 706 656	Kratie district, Kratie province
4	Jinri Investment (Cambodia) Co.,Ltd	Processing Factory of Agro-Industrial crop (Cassava, Peanut, Cashew)	2 139 220	Khan Porsenchey, Phnom Penh
	<b>Total</b>	<b>4 projects</b>	<b>37 706 837</b>	

Source: Council Development of Cambodia

**Table J:** List of Cashew Exporters (HS-08013100, HS-08013200)

No	Enterprise/Company	Address
1	FREE XPORT CROP CO., LTD.	No. 685, Street 99, Sangkat Russey Keo, Khan Russey Keo, Phnom Penh.
2	V.D.CAM IMPORT-EXPORT CO., LTD.	No. 83E1, Street 118, Group 2, Village 1, Sangkat Phsar Thmei 2, Khan Daun Penh, No. 685, Street 9, Sangkat Russey Keo, Khan Russey Keo, Phnom Penh.
3	SOKHA HAI IMPORT-EXPORT CO., LTD.	No. 685, Street 99, Sangkat Russey Keo, Khan Russey Keo, Phnom Penh.
4	NEANG POV IMPORT-EXPORT CO., LTD.	Group 1, Po village, Kong Kang commune, Ponhea Krek district, Kampong Cham province.
5	SOK SENG IMPORT-EXPORT CO., LTD.	# 685, Street 99A, Boeung Salang Village, Sangkat Russey Keo, Khan Russey Keo   Phnom Penh
6	FIRST PRO SOLUTION CO., LTD.	No. 187, Street 93, Sangkat Toul Sangke, Khan Russey Keo, Phnom Penh.
7	CHHUN RAT CO., LTD.	# 09E1, Street E, Phou Paem Village, Sangkat Kork Roka, Khan Prek Pnov, Phnom Penh.
8	TOEU GEN MENG IMPORT-EXPORT CO., LTD.	Stung Cheung Street, Popel Commune, Ponhea Krek District, Tbong Khmum Province.
9	CV HOME PRO IMPORT-EXPORT CO., LTD.	No. 5A, Concrete Road, Toul Sangke Village, Sangkat Toul Sangke, Khan Russey Keo   Phnom Penh
10	NEANGPICH APHIVATH IMPORT & EXPORT CO., LTD	No. 536, National Road 7, Suong Lech Village, Sangkat Suong, Suong Municipality, Tbong Khmum Province.
11	DC. CAM CROP CO., LTD	# 83E1, Street 118, Group 2, Village 1, Sangkat Phsar Thmei 2, Khan Daun Penh, Phnom Penh.
12	QIAN YI SHI JI CO., LTD	No. 901BER, National Road No. 2, Toul Roka Village, Sangkat Chak Angre Krom
13	LENG CHENG XPORT (CAMBODIA) CO., LTD	# 685, Boeung Salang Village, Sangkat Russey Keo, Khan Russey Keo, Phnom Penh.
14	B.P.P RUBBER CO., LTD	No. 27, Old Street 7, Village 10, Kampong Cham City, Kampong Cham Province
15	THANHLAN (CAMBODIA) CO., LTD.	No. 9 Street E, Sangkat Kokroka, Khan Prek Pnov, Phnom Penh.
16	ROYAL TRUST TRADING CO., LTD.	No. B070, Street 70, Sangkat Srah Chak, Khan Daun Penh, Phnom Penh
17	SAMETHIPHAL KAKSEKOR RUNG ROEUNG CO., LTD.	Boeung Reang Village, O'Sralou Commune, Malai District, Banteay Meanchey Province.
18	JH AGRICULTURE EXPORT IMPORT (CAMBODIA) CO., LTD.	No. 605, Mondul 1 Village, Svay Dangcum Commune, Siem Reap City, Siem Reap Province.
19	HJ INTEGRITY INVESTMENT CO., LTD.	Koh Pich Center, Building B-04 and A-01, LA SEIN House, Sangkat Tonle Bassac, Khan Chamkarmon, Phnom Penh

20	SANTANA AGRO PRODUCTS COMPANY LIMITED	No. 4015, Street 2004, Trapeang Lvea Village, Sangkat Kakab
21	SPECIALIZED CAMBODIAN PRODUCE CO., LTD.	Khan Por Senchey, Phnom Penh, No. 43, Preah Sihanouk Blvd, Sangkat Chaktomuk, Khan Daun Penh, Phnom Penh.
22	ROYAL CASHEW EXPORT (CAMBODIA) CO., LTD.	New Town, # 25, Prey Tea Village, Sangkat Choam Chao, Khan Por Sen Chey   Phnom Penh
23	POWER AGRICULTURE ASIAN JH CO., LTD.	No. 605, Hap Gang Street, Mondul 1 Village, Svay Dangkum Commune, Siem Reap City, Siem Reap Province
24	RATHNA GLOBAL ENTERPRISES CO., LTD.	Chrey village, Kandek commune, Prasat Bakong district, Siem Reap province.
25	ANVI INTERNATIONAL CO., LTD.	No. 03E0, Street 103C, O Bek Kam Village, Sangkat O Bek Kam, Khan Sen   Phnom Penh
26	MTST AGRO PRODUCT CO., LTD.	Samrong Tbong Village, Trok Commune, Memot District, Tbong Khmum Province.
27	HUNG HIEP (CAMBODIA) CO., LTD	No. 230A, Norodom Blvd, Phnom Penh
28	VITHEY AGRICULTURE (CAMBODIA) CO., LTD.	National Road No. 7, Samrong Tbong Village, Treak Commune, Memot District, Tbong Khmum Province.
29	PICH LIM VOTHY APHIVATH CO., LTD.	No. 506, Street 59, Group 13, O'Anlok Village, Ta Sen Commune, Kamrieng District.
30	CAWOTRA CO., LTD.	Battambang Province # 1511, Street 15 Elite, Sangkat Tonle Bassac, Khan Chamkarmon   Phnom Penh
31	AIDC TRADING CO., LTD.	Sihanoukville Special Economic Zone, Po Thuong Village, Bit Trang Commune and Smach Deng Village   Ream Commune, Prey Nob District, Preah Sihanouk Province.
32	WELHUNT AGRICULTURAL TECHNO	Thleuk Village, Peuk Commune, Ang Snoul District, Kandal Province.
33	HENG CHANTHORN INVESTMENT CO., LTD.	# C34, Road Lum, Sangkat Boeung Tumpun, Khan Meancheay, Phnom Penh
34	CONFIREL CO., LTD.	No. 138 BIS, Street 110, Sangkat Choam Chao, Phnom Penh (EMAIL: EXPORT@CONFIREL.COM)
35	FREE CO ZONE CO., LTD.	No. 07E, Street 01, Sangkat Srah Chak, Khan Daun Penh, Phnom Penh
36	HUNG RUI DA INTERNATIONAL TRADE (CAMBODIA) CO., LTD.	No. F108, Fortune Street, Trung Moan Village, Sangkat O Bek Kam, Khan Sen Sok   Phnom Penh



37	PRKNT TRADING CO., LTD.	# 252, Veng Sreng Street, Prey Chisak Village, Sangkat Choam Chao 3, Khan Por Senchey, Phnom Penh (EMAIL: SOPHALNHANH43@GMAIL.COM)
38	CAM-POPULAR PLANTATION CO., LTD.	Watkor Village, Watkor Commune, Battambang City, Battambang Province.
39	AVIC ENERGY (CAMBODIA) CO., LTD.	Trapeang Trach Village, Damnak Ampil Commune, Ang Snoul District, Kandal Province.
40	AKUPARA VENTURES (CAMBODIA) CO., LTD.	Apartment 202, Street Keno 9, Village 5, Sangkat Tonle Bassac, Khan Chamkarmon, Phnom Penh
41	BIG LUCK IMPORT EXPORT CO., LTD.	No. 59CER, Street 115, Sangkat Veal Vong, Khan 7 Makara, Phnom Penh
42	CHANTY SEANG LY IMPORT EXPORT CO., LTD.	No. 96, Bayap Village, Sangkat Phnom Penh Thmey, Khan Sen Sok, Phnom Penh,
43	OVERSEAS FOODS IMPORT EXPORT CO., LTD.	No. 63, Street Lom, Sleng Roling village, Sangkat Teuk Thla, Khan Sen Sok, Phnom Penh.
44	PHENDAROTH IMPORT EXPORT CO., LTD.	# 114E, Street 5, Kraing Angkrang Village, Sangkat Kraing Thnong, Khan Sen Sok   Phnom Penh
45	EXPO DENZI CO., LTD.	A7, Kola Laom Street, Sangkat Chroy Changva, Khan Chroy Changva, Phnom Penh
46	VITHEY (CAMBODIA) CASHEW NUT CO., LTD.	National Road No. 7, Samrong Tbong Village, Trok Commune, Memot District, Tbong Khmum Province.
47	HENG XING LONG (CAMBODIA) INTERNATIONAL TRADING CO., LTD.	Borey Peng Huoth # 5, Street Borey 8, Sangkat Phnom Penh Thmey, Khan Sen Sok, Phnom Penh
48	QUANG POV LENG CO., LTD.	No. 09, Street E, Phlou Paem Village, Sangkat Kork Roka, Khan Prek Pnov, Phnom Penh.
49	KAMYA AGRITRADE CO., LTD.	No. 5, Room 302, Street 335, Sangkat Boeung Kak I, Khan Toul Kork, Phnom Penh
50	T.O.T (TRUST OUR TRADE) CO., LTD	No. 1A, Street 907, Sangkat Toul Sangke, Khan Russey Keo, Phnom Penh.
51	KC SKINCARE CO., LTD.	# 96, St. Avenue New Premium Lane, Sangkat Phnom Penh Thmey, Khan Sen Sok, Phnom Penh
52	PAN SOK LEANG CO., LTD.	No. 09, Street Euro, Klou Paem Village, Sangkat Kork Roka, Khan Prek Pnov, Phnom Penh.
53	EZER HEALING FOOD CO., LTD.	Building No. 111G, New Road (Keo Chenda), Village 3, Sangkat Chroy Changva, Khan Chroy Changva   Phnom Penh
54	CAMBODIAN AGRICULTURE COOPERATIVE CORPORATION PLC.	No. 13A, Lum Road, Sangkat Russey Keo, Khan Russey Keo, Phnom Penh
55	MEAS CHANNY IMPORT EXPORT CO., LTD.	No. 70 CDEO, Street 115, Village 2, Sangkat Boeung Prohit, Khan 7 Makara   Phnom Penh

56	SESAN AGRO CO., LTD.	O'Kandel village, Boeung Kanseng commune, Banlung district, Rattanakiri province
57	HESED AGRICULTURE TRADING CO., LTD.	No. 288, Street 10M, Bayap Village, Sangkat Phnom Penh Thmey, Khan Sen Sok, Phnom Penh.
58	KIROROM FOOD PRODUCTION (K.F.P) CO., LTD	No. 1B, Street 21, Sangkat Tonle Bassac, Khan Chamkarmon, Phnom Penh
59	NATURAL AGRO TRADE CO., LTD.	# 39, BE01, Street 1952, Sangkat Phnom Penh Thmey, Khan Sen Sok, Phnom Penh

Source: Ministry of Commerce

**Table K:** Data for Cambodian Cashew Exports in 2020 and 2021

Year	Quantity (kg)	Tax Fee (Riels)
2020	144,127,699	515,027,043,196
2021	175,781,945	780,241,415,574

Source: General Department of Customs and Excise of Cambodia

**The National Cashew Policy 2022-2027 was prepared by:**

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