Country Profile

India is a Southern Asian country, bordering the Arabian Sea, the Bay of Bengal, Burma and Pakistan

Capital	Delhi
Population	1,045,845,226
Area	3,287,590 sq km
Languages	English, Hindi, 14 other official languages: Assamese,Bengali,Gujarati,Kannada,Kashmiri, Malayalam,Marathi,Oriya,Punjabi,Sanskrit,Sindhi, Tamil,Telugu,Urdu
Currency	Indian Rupee (INR)
Ports & harbours	Chennai (Madras), Cochin, Jawaharal Nehru, Kandla, Kolkata (Calcutta), Mumbai (Bombay), Vishakhapatnam
Exports	textile goods, gems and jewellery, engineering goods, chemicals, leather manufactures
Imports	crude oil, machinery, gems, fertiliser, chemicals

Time Zone	UTC/GMT +5:30 hours
ISO Code	IN
Dialling Code	+91
Continent	Asia
Internet Domain	.in
GDP	$2.5 trillion (2001 est.)
Export partners	US 22.8%, Hong Kong 5.8%, Japan 5.3%, UK 5.3%, Germany 4.6% (2000)
Import partners	Benelux 8.5%, US 8%, UK 6.2%, Japan 5.7%, Saudi Arabia 4.6% (2000)

Structure and Organisation

Historical Perspective

The history of cashew (*Anacardium occidentale* L.) in India is only **5 centuries old** and very sketchy. It is a confirmed fact that Brazil is the home of cashew. It has also been ascertained that it was carried by **Portuguese** seafarers and got introduced into the West Coast of India in the **Sixteenth Century**.

It is assumed that the Portuguese missionaries brought the cashew tree to Goa in India from Brazil circa **1560-1565 AD**. From Goa, this great nut trickled down the Konkan coast and finally arrived in Kerala. This is evidenced by the fact that raw cashew is called " **Parangi Andi**" in Malayalam, which literally translates to "Portuguese Nut".

The crop spread naturally in the foothills of the Western Ghats in the coastal stretch from **Goa to Kochi on the West Coast**. In this century, it spread to the East Coast, particularly from the **North of Chennai to the Southern Part of West Bengal**.

In the early period of its introduction, it was only a crop for **afforestation and soil conservation**. The technology to extract the kernel from its shell, which contains anacardic acid, was developed in Kerala during the **1920**'s. This led to commercialization of the crop for kernel production and its introduction to international trade. It was only from the early part of the current century that its commercial value for export and foreign exchange earning was realised. It is having nearly **500 years** of tradition for its cultivation and **75 years** for processing and export.

Area, Production and Marketing

Cashew is grown in the **East and West Coast** of the country. The states include **Goa, Maharashtra, Kerala, Karnataka in the West Coast** and **Tamil Nadu, Andhra Pradesh, Orissa and West Bengal in the East Coast**. Other states, which produce cashew, are **Manipur, Tripura, Meghalaya, Andaman and Nichobar Islands, Madhya Pradesh**.

Cashew growing States and processing areas

Growing States	Processing areas
Kerala	Kollam
Maharashtra	Vengurla
Andhra Pradesh	Palasa
Orissa	Bhubaneswar
Karnataka	Mangalore
Tamil Nadu	Kuzhithurai, Panruti
Goa	Goa
West Bengal	
Madhya Pradesh	
Manipur	
Tripura	Agartala

It is extremely **difficult to estimate the area under cashew accurately**. This is so because cashew cultivation falls into several categories, such as, small holder plantation, community plantations, social forestry, corporate sector plantation, government owned forests, soil conservation forests and also due to unsatisfactory methods of data collection and estimation in some states.

Cashew plantation in different states has been taking place in **Private Sector, Forest Department and of late by certain state level corporation**. Of the total area, nearly 74% is in private sector, contributing 50% of the national production. Nearly 9% area and 6% production is from forest sector and 17% area and 14% production from plantation owned by different state level corporation. Productivity is high in private sector compared to other sectors.

Cashew plantation status in India (1997-98)

Agency	Area (Ha)	Production (Tons)	Productivity (Kg/Ha)
Private	51,8,666 (74)	2,88,000 (80)	725
Forest	63,081 (9)	21,600 (6)	470
State Corporation	153 (17)	50,400 (14)	525
Total	7,00,900	3,60,000	

Source: CEPC, Cochin.

Raw cashew is a Horticulture produce which is harvested by the farmers usually in the month of **March, April and May**. It hardly requires any preparation before **marketing**. Farmers usually accumulate a reasonable quantity before they bring it to the market.

Raw cashews have a **ready market** in growing areas. Usually buyers are traders in villages and towns located in major cashew growing areas. As the availability is seasonal, generally traders take upon this as **seasonal trade**. Most traders are dealing in similar products or indulge in general trading around the area.

Different regions of the country have different patterns with regard to marketing of raw cashews. In some places, notably in **Kerala and Karnataka**, raw cashews are sold immediately after harvesting. In places like **Maharashtra and Goa**, they accumulated over a period of time and brought to the market during a particular time of the month. In **Andhra Pradesh and Orissa**, in addition to the above, large growers tend to hold back the produce and sell it in larger volumes. The entire crop needs to be marketed during the short period of **3-4 months** and the manufacturers are forced to cover their annual requirements.

The popular misconception is that there are innumerable middlemen in the cashew trade. The fact is that in raw cashew trading, middlemen are minimised because it is **highly specialised**. Secondly, it needs huge **working capital**. Thirdly, the trader requires to have a **working relationship** with the manufacturers who are few in numbers in every area. Sometime, it is necessary for the manufacturer to have an intermediary, who is a broker or a commission agent, who will consolidate the purchase.

It is a fact that the distribution of raw cashew nuts is done at fair margin and there is **no extraordinary or large difference** between what the manufacturer pays and what the grower gets. The advantage in raw cashew marketing is that **any quantity** from 5 kg to 10,000 kg is marketable in all parts of the country where it is grown. Difference in prices may persist depending on **locational factors**.

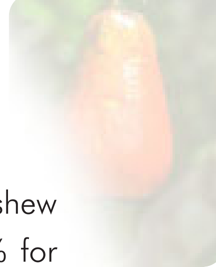
Except in the state of Kerala, which has a **monopoly procurement scheme in few year**, all other states had a **free market**. Some of the states have an **agricultural market fee**. But the payers are not getting the worthwhile services.

Processing

The cashew kernel processing factories are concentrated in 3 states.

Kerala: Kerala's cashew producing industries are centred mostly in **Quilon** area. Processing industries are also located at **Trivandrum, Alleppey, Pathanamthitta** and **Thrissur** districts. Many factories have moved to Tamil Nadu's Kanyakumari district, due to the problems such as **labour, legislation and wage rates**. Of the total number of industries, just **25%** are capable of running the factory all through the year and their utilised capacity is in the range of **1,000-5,000 tons per annum**. The government of Kerala fixes the wages for labourers, who work in different sections of industries. The workers also get a minimum bonus of **8.33%** as a motivating factor. Raw nut procurement is done in four ways at Kerala, i.e., direct purchase from producers, purchase from local market, direct purchase from trade agencies and through imports. Mostly raw nuts of indigenous origin are procured from local markets located at Anchal, Paracode, Thamarakulam, Kadaikan, Kallara, Milimanoor and Kadambanadu. However, 60-75% of total requirement of raw nuts is derived from imports. Visual, floating and cutting tests are conducted for finding out the quality of nuts and fixing prices by the processors. There are some reasons for import of large quantities such as tax exemption (4% purchase tax), reasonable price and availability all over the year.

Andhra Pradesh: Majority of the processing units are in **Palasa region**. About **66%** of cashew industries in Palasa region have a capacity utilisation between **0.64-1.44 tons per day**. The first cashew-processing unit was started at **Mori of Rajahmundry** in the 18th century. Afterwards, cashew units came up in Palasa and **Vetapalem** at the beginning of the 19th century. There was a rapid growth in Palasa region due to the easy availability of raw nuts from adjoining districts and the neighbouring state. **68 processing units** are functioning at Palasa, locally called 'Bhatti'. There are 73 management units that share the processing facilities, that are mainly drum roasting and kernel drying with existing units. Nearly all the units come in the category of tiny units, based on total capital involved and power requirement. It has been estimated that all these units have an estimated capacity of 32,000 tons per annum, with a potential to generate employment for 4,350 persons. However, just 22% of total units function all through the year due to insufficient financial support and less demand of cashew kernels in the domestic market from the region. **Palasa Cashew Exporters Private Limited** has started exporting cashew kernels from this region from 1983. At present, every year, cashew kernels worth around Rs 3.0-3.5 million are being exported. The region was declared as pollution



affected area due to emission of smoke during drum roasting. Due to this, establishment of cashew industries in this region has been discouraged. The government announced a subsidy of 20% for infrastructure development to begin processing industry at the outskirts of Palasa. Raw nuts are generally bought through commission agents from Mangalore, Rajahmundry and Orissa between March and May. East Godavari district provides 33% of the total requirement of raw nuts. Floating and cutting tests are conducted for checking the quality of nuts in winter and summer respectively.
Most of the industries at Karnataka are fully depend on indigenous nuts and procurement is in the range of 100 to 5000 tons per annum.

About 57% of the cashew processing industries in Karnataka are situated in **Dakshina Kannada** district with a capacity ranging from **101-500 tons per annum**. The steam boiling method of raw cashew conditioning is being followed, as recovery of kernel is more, when compared with other methods. CNSL (Cashew Nut Shell Liquid) is derived by the expeller method and this is followed in very few industries. Most of the processing industries in Dakshina Kannada are managed privately, either **single ownership /proprietorship (10%) or partnership (81%)**. Finance is the main requirement for running an industry in a smooth manner. Most of the processing industries are categorised under partnership group due to heavy capital investment and insufficient finance as running capital. Non-availability of funds also makes it difficult to maintain them as well organised units. Most industrialists rely on commercial banks and state financial agencies for running capital. There are about **52.5%** of the industries that supply processed kernel to the domestic markets, while **39%** export kernel as an end product. Cashew nut shell extraction takes place in **8.5%** of the industry and no processor does value addition in bulk quantity. About 51% of the industries come under the category of 100-500 tons per annum, 20% of units are capable of procuring 501-1000 tons per annum and 12% of industries are procuring 1000-5000 tons per annum raw nuts. Nineteen per cent of the industries have the capacity of producing kernels upto 25 tons per annum. Thirty six per cent of the industries' annual kernel production is in the range of 26-100 tons per annum and the 30% of the industries are capable of producing kernels in the range of 101-200 tons per annum.

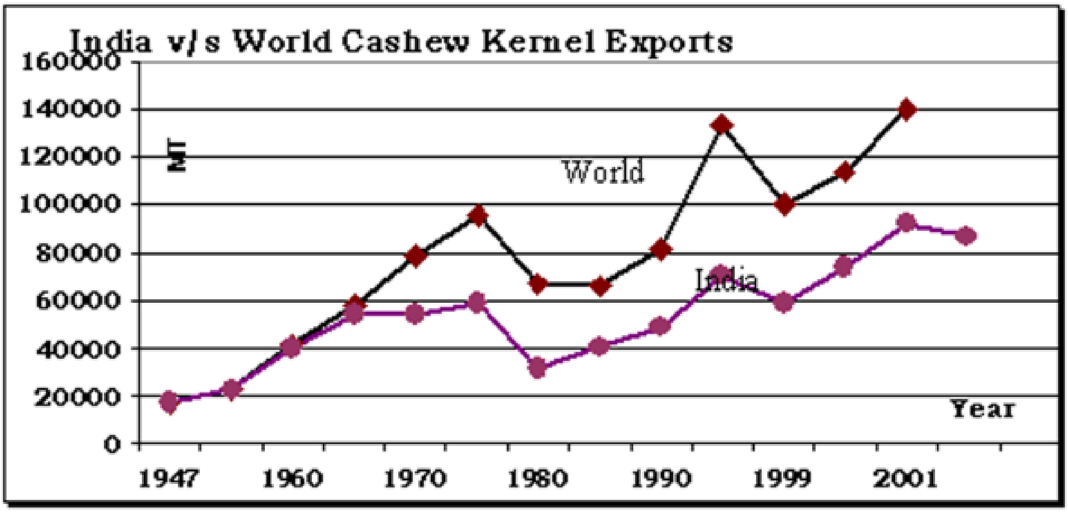
Indian Cashew Processing Industry during 1999

States	Processing Units (no)					
	Organised	Unorganized	Total	Capacity ('000 tons)	Processing Consumption ('000 tons)	Labour force (no)
Kerala	375	23	398	600	193	223,000
Karnataka	164	8	172	30	25	15,500
Goa	25	32	57	15	8	1,200
Maharashtra	-	49	49	20	6	750
Tamil Nadu	217	24	241	271	150	73,300
Andhra Pradesh	38	65	103	32	28	4,350
Orissa	-	33	33	15	15	700
West Bengal	-	45	45	7	5	150
Total	819	279	1,098	1,000	430	320,300
Through imports					220	

Export

It is to India's credit that cashew kernel found its place in the global market place. What was an essentially a wild crop till the early 1920s, was connected into an economic opportunity. This led to organised manufacture and export and a natural expansion in the industry. The commercial export of cashew kernel in the world first started from India with shipment of about just 45 tons of cashew kernel in the year 1923 to the USA. India enjoyed a monopoly position in the international trade supplying 95% of the kernels until three decades ago and the same has declined to around 50% of the global trade at present. In 70's other countries gradually intercepted the Indian business and Indian share to global market gradually reduced. Thus, Indian cashew exports moved from **monopoly to competition**.

Comparison between India & world cashew kernel exports



Source: DGCIS, Calcutta.

Organisations

The Cashew Export Promotion Council

The Cashew Export Promotion Council of India (CEPC) was established by the Government of India in the year 1955, with the active co-operation of the cashew industry with the object of promoting exports of cashew kernels and cashewnut shell liquid from India. By its very set up, the Council provides the necessary institutional frame-work for performing the different functions that serve to intensify and promote exports of cashew kernels and cashewnut shell liquid.

The Council provides the necessary liaison for bringing together foreign importers with member exporters of cashew kernels. The enquiries received from the foreign importers are circulated amongst Council members.

The Council also extends its good offices in settling complaints amicably in the matter of exports/ imports either on account of quality and /or variation in fulfillment of contractual obligations.

Publicity and Promotion Abroad

The Council undertakes publicity abroad with a view to projecting the 'Product Image' which serves to highlight and focus attention on the high quality and superiority of Indian cashews.

Participation in Exhibitions

The Council participates in specialised International Food Fairs/ Exhibitions and general fairs abroad.

As the Council represents the whole industry, it arranges display of products received from members free of cost. The enquiries received are circulated amongst the members for them to contact the parties abroad for business negotiations.

Address: The Cashew Export Promotion Council of India
PB 1709, Chittoor Road, Ernakulam, Cochin 682 016, India.
Telephone: +91 - 484 - 2376459 Fax: +91 - 484 - 2377973
E-Mail: cashew@vsnl.com URL: www.cashewindia.org

National Research Centre for Cashew

The main campus at Puttur is spread over 68 ha which houses the Laboratory-cum-Administrative Block, Tissue Culture and Bio-control Laboratories. The Experimental Station at Shantigodu is spread over 80 ha and has Entomology field laboratory in addition to a number of field experiments.

The Centre has well equipped laboratories with sophisticated equipments for analytical work including preparatory ultra centrifuge, gas chromatography, HPLC, Spectrophotometers, Atomic Absorption Spectrophotometer, Photosynthesis analyser, Leaf area meter, Auto analyser for nitrogen and Electrophoretic system, etc.

Besides these, a tissue culture laboratory has been established with modern facilities under the World Bank aided NARP-II phase.

NRC-Cashew is also serving as the Headquarters of All India Co-ordinated Research Project on Cashew (AICRP), co-ordinates the research activities in eight centres and one sub centre spread over eight different states under the State Agricultural Universities

Address: National Research Centre for Cashew, (Indian Council of Agricultural Research)
Puttur, Dakshina Kannada, Karnataka State, India - 574 202
E-mail: nrccaju@sancharnet.in Phone: 0091-8251-20902; 21530; Fax: 0091-8251-24350

The Kerala State Cashew Workers Apex Industrial Co-operative Society Ltd (CAPEX):

The society has the primary aim of organising the cashew industry in the state, providing assistance to procure raw nuts, making sufficient funds available for processing and marketing of kernels and other items produced in the factory. CAPEX has established about 10 factories in the state. These factories have generated employment for 6000 workers in the region. These units are situated in Alleppey, Quilon and Trivandrum. Every day on an average of 80 bags of cashew are processed. All these factories operate just for 100 days in a year. All the factories follow the drum roasting method. Raw cashewnuts are imported and distributed in the lean period. Of the total kernel production, 60% is exported.

Kerala State Development Corporation (KSDC): The Corporation, a government organisation, was registered in 1969. The organisation has 34 cashew factories under it. There are 27 in Quilon, 3 in Alleppey, 2 in Trivandrum, one each in Thrissur and Cannanore. The processing capacity varies from 45 to 140 bags per day. The factories have provided an employment opportunity for nearly 23,841 workers.

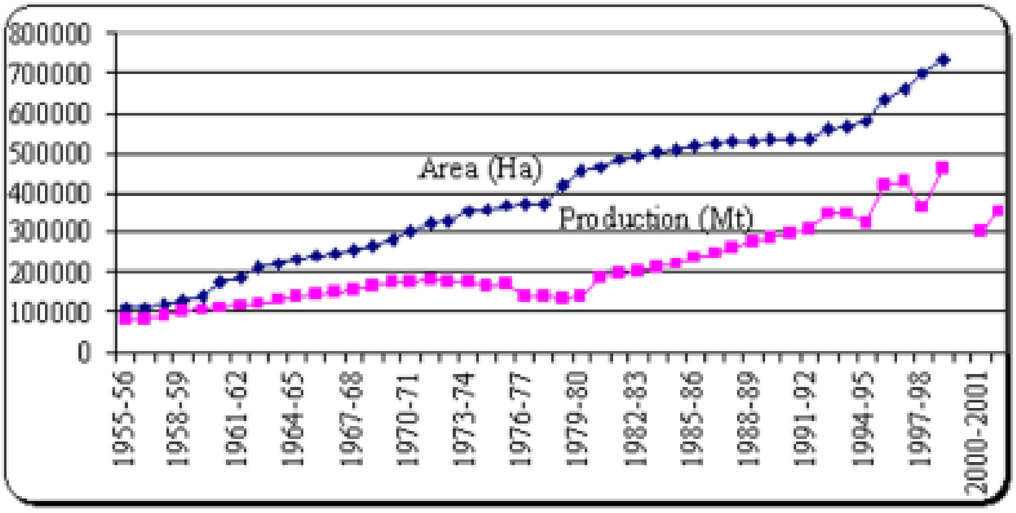
The Manglore Cashew Manufacturers Association: The Manglore Cashew Manufacturers Association was established in 1955 under the Indian Companies Act, VII of 1913, bye seven members then with the object of promoting of cashew industry in Karnataka. Since its inception, the Association has grown many folds to reach the current membership of over 100 members in the districts of Dakshina Kannada, Udupi, Uttar Kannada and Kasargod. In this area over 140 units directly employing more than 30000 workers, 95% of who are women from the weaker sections of the society.

Other organisations involved are **Palasa Cashew Exporters Private Limited, Directorate of Cashew and Cocoa Development** etc.

Sector Performance

Area, Production and Productivity

Area and production of cashew nut in India: (1955-56 to 2001-2002)



According to the official estimates the area under cashew in India in the year 1955-56 was 110,381 hectares. The graph shows there was continuous increase in area till 2001-02. In 2001-02 the area under cashew in India was 757,000 hectares. Where as the production has increased from 79,472 tons during 1955-56 to 3,50,000 tons during 20001-02.

Statewise growth in cashew area in India (area in Ha)

State	59-60	69-70	79-80	89-90	99-00	Increase/ decrease from 89-90 to 99-00
Andhra Pradesh	7485	25,640	44,300	71,070	103,000	31,930
Kerala	52,439	98,960	147,891	155,390	122,000	-33,390
Orissa	721	3,309	38,830	59,980	84,000	24,020
Maharashtra	3,279	7,334	22,692	22,750	121,000	98,250
Karnataka	6,058	19,500	53,171	73,780	91,000	17,220
Tamil Nadu	35,021	80,101	94,770	95,370	85,000	-10,370
Goa	32,517	33,938	41,600	44,240	54,000	9,760
West Bengal	2,140	2,389	6,698	6,800	9,000	2,200
Others	-	-	1,202	1,490	17,000	15,510
Total	139,660	271,171	451,154	530,870	686,000	155,130
Increase over previous period	-	-	131,511	179,983	79,716	155,130

Source: CEPC, Cochin.

The area expansion was not uniform in the entire cashew growing area in India. States like Maharashtra, Andhra Pradesh, Orissa, Karnataka have observed a high increase in area. In Orissa between 1959-60 and 1999-2000 there was more than 115 times increase in area. In Goa, West Bengal and others which includes Tripura, Pondicherry, Madhya Pradesh, Manipur, Meghalaya, Andaman and Nichobar the increase in area was comparatively low. This is because quite a sizable area was already under cashew and unavailability of land in some states (Pondicherry). In Kerala and Tamil Nadu the area under cashew has decreased during 1989-90 and 1999-2000 mainly because of the illegal felling of trees in some of the potential sectors by organised gangs for their supply to both paper and rayon industries. But in India there was a surge of 155,130 hectares of land during 1989-90 and 1999-2000 period. The area under cashew in India increased by around 5 times between 1959 -60 and 1999-2000.

Statewise growth in cashew production in India (output in tons)

State	59-60	69-70	79-80	89-90	99-00	Increase/decrease from 89-90 to 99-00
Andhra Pradesh	2,275	12,971	12,300	36,580	100,000	63,420
Kerala	81,678	111,033	83,843	139,500	125,000	-14,500
Orissa	1,746	3,519	3,199	28,600	40,000	11,400
Maharashtra	-	1,214	7,663	27,130	100,000	72,870
Karnataka	6,088	16,500	15,226	24,650	60,000	35,350
Tamil Nadu	13,859	27,582	10410	12,430	45,000	32,570
Goa		3,400	6,118	13,210	30,000	16,790
West Bengal	1,505		2,807	3,170	8,000	4,830
Others			218,748	320	12,000	11,680
Total	107,151	176,219	141,832	285,590	520,000	234,410
Increase over previous period		69,068	-34,387	143,758	234,410	

Source: CEPC, Cochin

States like Maharashtra, Andhra Pradesh, Karnataka and Tamil Nadu have observed a high increase in production. In Goa, Orissa and others which includes Tripura, Pondicherry, Madhya Pradesh, Manipur, Meghalaya, Andaman and Nichobar the increase in production was comparatively low. In Kerala cashew production has decreased during 1989-90 and 1999-2000. During the period the over all Indian production has increased by 234,410 tons. The production in India has increased by around 5 times between 1959 -60 and 1999-2000. The increase in production during this period is more in AP when compared to other states.

The growth of cashew area decreased in last 3 decades when compared 50's, 60's & 70's due to the fact that sizable area was already under cashew cultivation and non-availability of land for expansion in some states. Illegal felling of trees in some of the potential areas by organised groups for their supply to both paper and rayon industries and the conversion of cashew area to rubber plantation in Kerala, the main cashew growing state, were the main reasons attributed to this declining trend in area. During 90's again the annual growth in cashew area has increased. The steps taken by the governments by formulating economically viable schemes and proper extension programs resulted in a steady increase in cashew area. No availability of raw nuts for import from other countries is also boosted the area under cashew in 90's.

The growth rates in cashew production were not commensurate with the expansion of area. The relatively low increase in production compared to the expansion of area was due to passing of juvenile stage by the young plantation in most cases and at the same time, the presence of sizable senile and unproductive cashew trees in some locations and incidence of pest and diseases. Besides this, the crop is grown on marginal lands.

Processing

The **growing demand for kernels** in the international market and the availability of **cheap possessing labour** (mainly of women), the required skills in processing are the important favourable factors for the rapid growth of cashew processing industry in India. Cashew processing industry in India flourished primarily because of the **international market.**

There is a huge **idle processing capacity** in the country, which can be utilised by the increasing availability of raw cashewnut.

The industry pays **more preference to imports** than indigenous production for export of kernels. Internal production is utilised by the industry only as cushion to make up the deficit for export. **Kerala rawnut price is a determining factor** for fair price of rawnuts in other producing regions of the country.

The production of raw nuts in the country is far below the requirement of the processing sector and the potential available for export.

Demand for raw cashew nut in India

	2000-01
Domestic raw cashew nut production	350,000 tons
Average imports of raw nuts	250,000 tons
Total rawnuts available for processing	600,000 tons
Total processing capacity of only organised sector, which process 60 to 70 per cent of total raw cashew nut	1,000,000 tons
Shortage of raw cashew nuts for organised sector	400,000 tons

The industry is unable to find adequate raw cashew nuts to sustain itself, thus forcing many units to **remain closed** for a considerable part of the year affecting the **employment opportunities** of the factory workers. Even if India doubles its production of cashew nuts there would not be any marketing problem or price fall. There is undesirable instability in the quantity of raw cashew imported.

Cashew industries have a simple organisational structure and mostly under private management i.e. **proprietorship** (63%) or **partnership** (19%). Since it requires a large amount of initial investment and running capital, most of the industries depend on **commercial banks and state financial agencies** for running capital.

About **62%** of the industries are categorised under "**Manufacturer-cum-Exporter**". This is primarily due to the encouraging export policy and low per capita consumption in India.

During off-season, in order to run the factory throughout the year, **50%** of the total factories **import raw nut**. The availability of raw nut in India is from March to June only. Inadequate supply of raw nuts and fluctuating price make the processors heavily dependent on the raw nut import from Brazil, West and East Africa and Vietnam.

Tiny processing units (up to 100 tons/year) and **medium capacity processing industries** (100-500 tons/year) account to **39%** and **42%** respectively. This is mainly due to raw nut shortage and financial constraints. Utilisation capacity of most of the industries is **below 50%.**

About **90-95% of women force** is employed in these industries at different stages of processing. The total strength varies in range of **50-400**. Men labourers are mostly involved in drying, stacking, roasting, kernel drying and packaging. About 80% of the total women workers are involved in shelling and peeling itself. Since, both the processes are highly laborious, the **wages are fixed by the government at different stages of operation and strictly followed**. The labour cost, however, differs from state to state.

Harvested nuts are dried under the sun immediately after procurement. Turning of nut at regular intervals is done to ensure uniform drying. The dried nuts are filled in gunny bags of **80-kg** capacity and stocked in godown. Few industries in Mangalore indicated the application of pesticide after three months of storage to avoid insect infestation.

Roasting

Drum roasting (66%) as preliminary roasting is followed in **Kerala, Tamil Nadu, Andhra Pradesh, Orissa and West Bengal**. The **latest method of steam boiling (27%)** is practised in **Karnataka, Goa and Maharashtra**. Very few industries **(7%)** are still following **outdated method of oil bath roasting**. This may be due to infrastructure developed for oil bath roasting and additional finance requirement to develop facilities for other methods.

The **feed rate of raw nuts** and **rotational speed of drum** are the two important factors that decide the **quality of processed kernels**. On the other hand, the **duration of boiling** and **steam pressure** have the main bearing on the kernel quality in steam boiling.

Shelling

There are **generally two ways of shelling**.

Mallet hitting, through semi automatic hand cum pedal operated cutter and semi automatic single operation unit. Mallet/stone is required for shelling drum-roasted nuts. On an average, **two to two and a half persons are necessary for completing shelling of 80 kg raw nuts per day**. They have to do this for **eight hours**.

However, steam boiled nuts are decorticated by **using hand cum pedal operated cutting** unit. **Two persons are required for shelling an 80 kg raw nut per day**. In both the cases, the nut recovery process is in the range of **90-95%**. Despite the fact that workers apply ash on nuts in drum roasted nuts, their hands are exposed to the adverse effects of CNSL. In some factories, labourers in the shelling section are given finger gloves for avoiding the CNSL effect on hands to a certain extent.

The **quantity of kernel recovered** in drum roasting is slightly lower, when compared with steam boiling, as a spoiled nut burns completely, while it is being roasted.

Steam boiled nuts are cooled for 10-14 hours for making shell brittle. The operation enhances the whole recovery process. Cooling of drum roasted kernels is done for 1-2 hours, so that the CNSL can be drained out and the temperature of the nut can be brought down.

Drying

There are **three different forms of kernel dryers** that are used in general. They are:

- **Conventional 8 feet borma dryer**, built with brick and mud. The kernels are spread on wire mesh tray and subjected to hot air by putting in a chamber above the furnace.
- **Tunnel dryer**, in which hot air produced outside, is passed into the drying chamber by using tunnels. Heat utilisation efficiency is more.
- **Electrical borma dryers**, in which both hot air temperature and flow rate are controlled automatically by thermostatic mechanism. Just **four hours** are required for drying **400 kg of kernels**. It has 120 trays in 4 trolleys with holding capacity of 4 kg. Kernels are subjected to 70^{0}C. **Uniform drying and minimum supervision are the main advantages of this system**.

Peeling & Grading

Peeling is a labour intensive process. Fingernails are normally used for removing testa. The average production capacity of **eight hours labour per day is 6-10 kg**. The first grading of **7-10 grades** is done in this section. Wages are fixed on the basis of whole kernels and this acts as a control for careful work.

The **standard specification** for Indian cashew kernel is prescribed under **the Export (Quality Control and Inspection) Act, 1963**. The processors involved in export of kernels only follow the specification very strictly. A high degree of cleanliness is maintained in the grading section. The kernels are sorted out into **wholes, splits, broken** etc and the wholes are graded into different sizes on the basis of the **number of wholes per pound**, according to the specification. All the operations are done manually.

Humidification

Humidification of kernels is one of the processes followed in summer for avoiding excessive breakage, during handling and transport. The permissible moisture content after packaging is just **5%.**

Packing

Graded kernels are packed in **25-lb (11. 34 kg**) capacity tins on weight basis. The tins are subsequently evacuated and filled with **carbon dioxide gas** with the assistance of packing unit, called 'Vita pack', for suppressing the possible insect attack. This also helps in bringing down the likelihood of rancidity. Kernels filled in containers and inert gas are soldered afterwards. Packed tins are then labelled as per grades across the lid, by using special temper proof adhesive. **Two tins** that contain 25 lb of cashew kernels are packed in a **corrugated cardboard carton** that is bound by nylon strapping for the purpose of exports. Standard markings are printed on the carton. They include brief description, name of packer, gross and net weight etc. that are printed on the carton. **Vita packing** system is followed in about 80% of the industries. Tin containers of 25 pound capacity are used for packaging kernel and these tins are packed in carton boxes. In a kernel-filling machine, 4-6 tins are placed on a vibrating platform, while filling by a chute. Blowers that are provided across the chute remove dust and kernels with less weight. The tins are vaccumised and flushed with CO_2 with the help of VITAPACK machine and sealed afterwards. The use of CO_2 brings down oxidative rancidity and also assists in checking leakage. Any leakage in filled containers can be detected by the hollow sound that comes out while tapping the sides of the tin. Tin tester is also used for checking airtight packing by dipping in water.

Flexible Packaging (Moulded Vaccum Packaging) with nitrogen as inert gas is a better method for bringing down the heaviness and incurs less cost of packing. MVP system produces consistent rectangular blocks that range in size from 500 gm to 25 kg. This is a big improvement in quality production with the advantages of transport, handling, display, stock count, etc. The vacuum barrier bag and cardboard box are fully recyclable. The rectangular shape of primary packs ensures that the movement is minimum during transportation and handling, providing the maximum protection to the contents. The removal of air and gas flush bring down the incidence of rancidity and bacterial growth.

CNSL Extraction

Oil expeller (15 HP) is used for extracting CSNL. After extracting oil, it is transferred to the boiling unit, where it is subjected to 100^0C for 4 hours for evaporating moisture and cooled for 10-12 hours in settling tanks.

On an average, 5-6 barrels of CNSL are extracted every day, in a well-developed industry. Each barrel is of **200 litres**. **About 200 ml of crude CNSL can be derived per kg of shell** and the quality is checked by chemical method. The CNSL that is extracted is applied in break lining, paint and varnish industry and mostly exported for more revenue.

Processing cost of steam boiling requires a slightly higher than drum roasting. It has an added advantage of good quality of CNSL extraction as an extra benefit.

Cashew Nut Shell Liquid (CNSL) can be considered as a potential natural source for monomers for polymer production. Cardanol, its main constituent possesses special structural features, which can be chemically transformed into speciality and high value products/polymers. The significance of CNSL is evident from the fact that CNSL and its products are cited a large number of patents, reports and monographs and reviews.

Comparison of processing cost by different methods (Rs/kg)

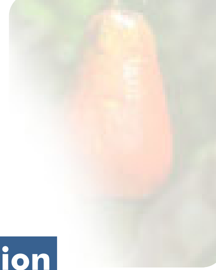
Processing stages	Oil bath roasting (Calicut)	Drum roasting (Palasa)	Steam boiling (Manglore)
Drying raw nuts	0.13	0.07	0.15
Preliminary roasting			
1.labour wages	0.12	0.11	0.18
2.fuel charges	0.25	0.04	
Shelling roasted nuts	1.39	1.13	1.28
Kernel drying(Tunnel drier)			
1.labour wages	0.20	0.02	0.19
2.fuel charges	0.10	0.05	
Peeling	1.30	0.99	1.26
Grading	0.24	0.12	0.57
Packaging			
1.wages			
2.container + soldering			
3.infusion of CO_2	1.54	1.31	1.53
Total	5.27	3.85	5.16
Advantage	Extraction of CNSL but discoloured oil	-	Extraction of CNSL of superior quality and reuse of shell cake

The basic requirements for development of mechanised cashew processing units are efficiency in production of unscorched kernels and maximum recovery of CNSL. A plant with a high degree of mechanisation will create social problems, as existing plants are highly labour intensive.

Calculation of CNSL Production Potential in India (2001)

Quantity

		Potential	Actual	Under utilization
1	Raw cashew nut availability			
	Domestic	3,60,000		
	Imported	2,25,000		
	Total	5,85,000		
2	Cashew Shell production at 70 per cent of raw cashew	4,09,500	1,33,333	2,76,167
3	Production potential of liquid at 24 per cent of Cashew Shell production	98,280	32,000	66,280
4	Volatility Loss at 4.2 per cent of Shell weight Carbon dioxide + Moisture	17,199	5,600	11,599
5	Cashew Shell Cake Production 70% of Cashew Shell Production (with average of 9% of Liquid content in Cake)	2,86,650	93,333	1,93,317
6	Other particles (sludge etc)	**7,371**	**2,400**	**4,971**
		4,09,500		**2,76,167**



Value of CNSL production (Rs. Crores)

		Potential		Actual		Under utilization	
		Min	Max	Min	Max	Min	Max
1	Raw cashew nut availability	Domestic		Imported	Total		
2	Cashew Shell production at 70% of raw cashew	81.90	122.85	26.67	40.00	55.23	82.85
3	Production potential of liquid at 24% of Cashew Shell production	88.00	127.76	29.00	41.60	60.00	86.16
4	Volatility Loss at 4.2% of Shell weight Carbon dioxide + Moisture						
5	Cashew Shell Cake Production 70% of Cashew Shell Production (with average of 9% Liquid content in Cake)	34.40	43.00	11.20	14.00	23.20	29.00

Note : In Item 2. Cashew Shell value is assumed at Min Rs. 2000/M.T and Maximum at Rs.3000/M.T.
In Item 3. CNSL value is assumed at Minimum Rs. 9000/M.T and Maximum at Rs.13000/M.T
In Item 5. Cashew Shell Cake value is assumed at Rs. 1200/M.T and Maximum at Rs.1500/M.T.

Cashew Apple:

Cashew apple can be used for preparation of various products. About 60-70 % raw juice with 9-10% soluble solids can be obtained. The cashew apple contains 87.5% moisture, 11.6 % of carbohydrate and 0.2% protein. Cashew apple is one of the **richest sources of vitamin C** (0.26%) and **minerals**.

Goa is the only place in India where cashew fenny has been distilled for the last four centuries or more.

The cashew apple is left to ripe fully on the tree and when it falls down the grower collects the fruit and separates the fruit from nut. All the fruits are put in one place and pressed by the legs or with the help of screw press so that juice is collected.

The apple from which the juice is extracted is used again to collect some more juice. Weight is kept on the squeezed apple and the juice that comes at this stage is called **cashew neera**. This neera is being consumed as a beverage.

Fresh cashew apple is available during the cashew season from March 15 to June first week. And fruit is collected during of 3 p.m. daily and if there is more demand the juice is taken out immediately, if not juice is taken once in three or four days. Other than its own apple Goa gets cashew apple from **Maharashtra** based on demand.

The juice that is collected from screw press or leg pressing is kept for 3 to 4 days in a big vessel where it gets fermented.

After fermentation of the cashew apple juice they put in a big copper vessel which has an approximate capacity of 45-50 liters. The process of the fenny extraction is drawn below. The juice or alcohol that is collected in the bottle is called "URRAK". Usually out of 45 liters of cashew apple juice only 20 liters of Urrak will be extracted. The left over in the copper vessel is thrown out as waste. The alcoholic content in this Urrak is 45 -50% and this cannot be kept for long period and its shelf life is 3 months. Therefore the Urrak is again put in the copper vessel and mixed with cashew apple juice at 2:1 ratio. The above mixture of Urrak and juice is heated again where in the output is cashew fenny with a alcoholic content of 75 - 80%. From 30 liters of Urrak and 15 liters of cashew apple juice 18 – 20 liters of fenny will be extracted. If one wants pure fenny the ratio of Urrak and juice is changed (2.2:0.8) so that the alcoholic percentage can be increased.

Some of the bottling companies go for filtration of fenny before bottling them. There are also companies, which use additives to reduce the smell. The bottling companies also store the fenny for 1 to 1.5 years, as the fenny aged will have more taste and value.

Fenny is used as an healthy drink, used for medicine purpose for stomach disorder, etc. Medicinal roots are added to the fenny and taken as drink. It is a low investment industry.

The area is notified for extraction of alcohol/fenny from cashew apple from the state government. The excise department will conduct auction for the land and the highest bid will be given the permission for extraction of fenny for a period of 1 year.

Actual cost of fenny extraction is around Rs. 20 to Rs. 25 for 750 ml. The extractor sells the fenny for Rs. 35 to the wholesalers and the wholesalers filter and bottle the fenny in their own brand name and price it at Rs. 80 to Rs. 125 for 750 ml.

There are **54,000 hectares** of area under cashew cultivation in Goa. Cashew apple production is estimated at **20,000 tons**. There are **54 processing units** in Goa. **Forty percent of the state production is consumed locally and 50% is sent to other states and 10% is exported.**

Total supply of fenny in Goa is around **60,000 liters** on average whereas the demand is only **20,000 liters**. Fenny is being allowed to take to other states if one gets the import permit. And fenny is also exported to other countries like the **Gulf and Australia**. The Goa government is earning more than **Rs. 6 million annually** by fenny trade.

Pricing

During **1920- 1960** period the price trend for cashew kernel in the international market must have fluctuated in the region of 40 to 50 cents per lb. The cashew trade saw a steady movement with minor fluctuations during the **1960s**. The price has increased from 50 cents a lb to 75 cents a lb during this decade.

The 70s

The decade of the seventies could be described as tumultuous in the cashew trade. Cashew trade peaked in the year 1974. Consequently, state control of trading of raw cashew and embarking on manufacture of cashew kernels by raw cashew exporting countries halted the export of raw cashew into India. The result was for the first time a shift in unit value to a higher trajectory. Unit prices were in the range of US $ 1.00 to $2.5 per lb.

Another reason for this was marketing a large volume of cashew kernels to the erstwhile Soviet Union. Western markets had to hike store prices. Thus a core demand of cashew kernel at a price was established.

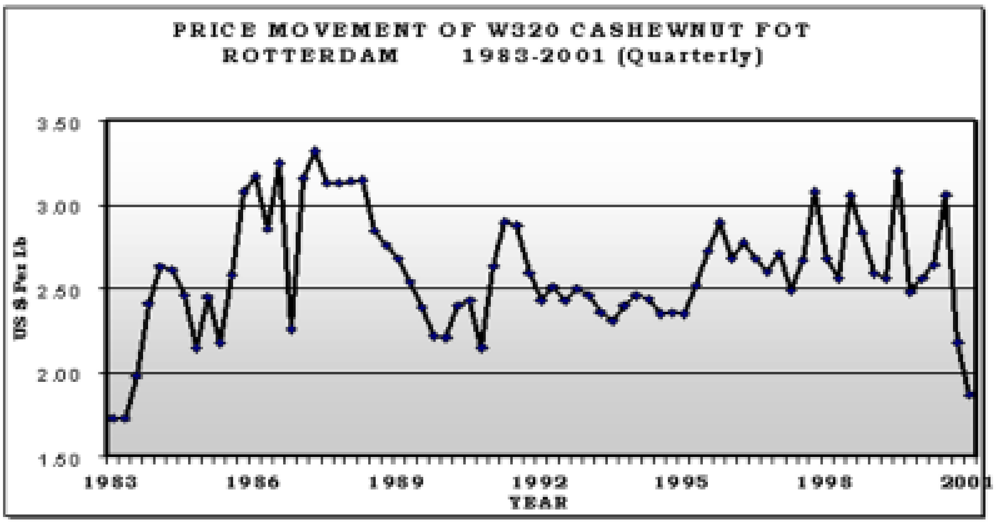
The 80s

The trend in 1980s was one of consolidation and development of the Indian crop. Better prices offered to Indian raw cashew producers, induced cultivation. A World Bank programme went underway which looked into holistically the agricultural side of cashewnut. There were cashewnut development programmes in many other countries in West Africa and South East Asia. The seed of the growth in the coming decade was planted in this decade. The Soviet Market was still active. But what was more important was the emergence of the Indian internal market as an attractive and expanding market. The Indian consumption had a phenomenal annual growth from 1980s till 1998. This was more marked in the broken grades and grades of higher counts. Prices fluctuated widely between US$ 1.7 to $3.45 per lb.

Slowly and surely, India's imports picked up, back from an all time low in 1984 to the present level of 3,25,000 metric tons in the year 2001. A lot of credit is due to Indian firms and their representatives, traders based in India and in those exporting countries. Trading firms in service countries especially in Singapore and Europe offered raw cashews out of all developing countries. Indian manufacturers went out to source them and brought them into India. This increased the capacity utilisation of factories and met the growing demand of cashew kernels.

The 90s

The last decade of 1990s saw a phenomenal growth in the European market. The appreciation of European currencies against the US Dollar saw cashew prices drop in real terms. The Dutch market grew enormously in per capita consumption. Rotterdam in Netherlands became the focal market for the whole of Europe. Trading companies in Rotterdam and London were now the suppliers of Europe.



Source :
CEPCI (1983-1986)
Man Product Rotterdam B.V (1987-1996)
CEPCI (1997-2001)

The year 1999 ended with a bang with prices touching over $ 3 per lb. However the beginning of the millennium again witnessed sliding prices in all the grades.

Year 2000

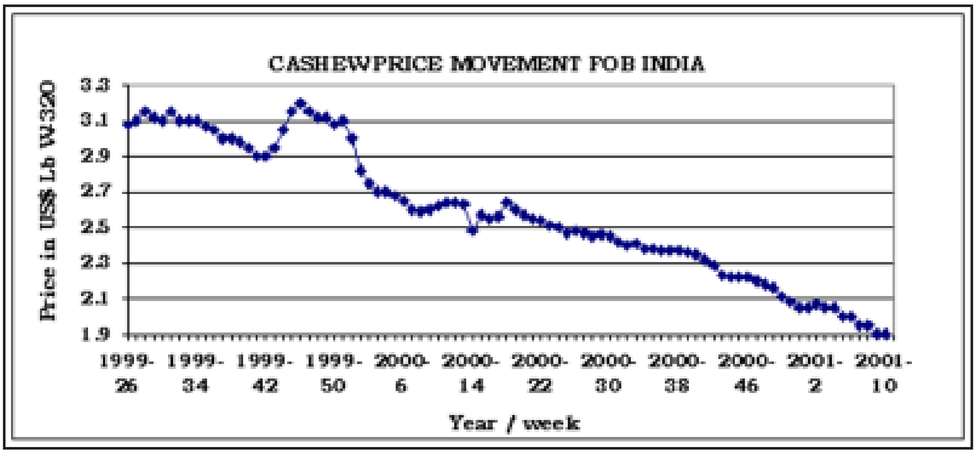
The year 2000 has not been kind to the global cashew industry. The entire trade in the Value Chain from producers, industry and traders has suffered in the process of a significant decline in prices.

It is said that in a market economy, "under certain conditions, including perfect competition, no person is better off without any other person being worse off". The same is true in this case that the net benefit of decline in prices will go to the consumers.

The Indian cashew prices for the year 2000 has been on a one way course of steep decline from the peak in the beginning of the year at US$3.05 per lb to a 16 year low of US$1.95 per lb at the end of December 2000.

The Kernel market began to decline in February – March and continuously throughout the year due to pressure on supplies. This hit the Indian manufacturers very hard. The increase in supply from Brazil was due to a recovery in Brazil's crop of 1999 over 1998 to the extent of 75,000 metric tons (165,000 metric tons in 1999 from 90,000 metric tons in 1998). This resulted in a supply of additional material in comparison to a lean supply from 1998 crop.

The Cashew Kernel market experienced a double somersault both by increased supply on one hand and decreased consumption on the other.



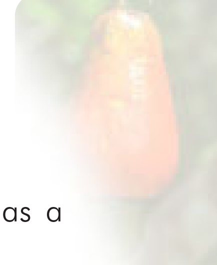
The European factor introduced tacitly a certain amount of rivalry between US traders, who were traditional buyers and the European buyers. The decades old agency system in the USA went into a decline. A major contention is that the rate of commission of 2.5 per cent had declined to 1 per cent.

The channel of distribution both from origins and within consuming countries is more or less the same. The agencies shifted from USA to India in the case of Indian exporters.

Exports

Cashew kernel exports

The importance of cashew exports to Indian economy arises from the fact that it earns a sizable amount of foreign exchange and it provides employment. The total exports earning from cashew kernel and allied product during the year 2001-02 has been estimated at Rs. 17.90 billions. Among



the agricultural products exported from India during 2000-01, cashew stood at 3rd position as a foreign exchange earner, contributing 0.93% of the total export earnings of the country.

Direction of Indian cashew exports

Members of the Cashew Export Promotion Council of India, who are manufacturers and exporters of cashew kernels are the major sources for cashew export from India. India exports to over 60 countries. The major consumers of Indian cashew kernel are USA, Netherlands, UK, Japan, UAE, France, Saudi Arabia and Canada. The Indian cashew kernel is well acclaimed for its good quality, taste and appearance.

Direction of Indian cashew exports (Qty in MT, Value in Rs. Crore)

Countries	1997-98		1998-99		1999-2000		2000-2001 (P)		2001-2002 (P)	
U.S.A	29678	536	34793	722	47190	1232.8	40392	923.6	48161	884
Netherlands	17827	332.8	14222	303.4	18668	502.6	16069	380.1	13915	254
U.K	5078	95.7	5375	117.2	7016	195.8	6416	148.7	6849	125
Japan	5261	97	4925	108.7	5003	137.5	5370	122	4166	78.1
U.A.E	2437	45.3	2901	64.5	3200	84.4	3688	83.65	3273	61.8
France	1865	29.8	2313	45.5	1866	47.4	2343	55.3	2810	58.9
Canada	630	11.4	447	10.1	1547	41	1463	32.5	2370	35.2
Saudi Arabia	1013	18.2	1110	24.8	1093	29.1	1630	37.7	1609	28.5
Singapore	1102	18.2	1037	21.9	1088	27.7	1297	24.2	1590	24.1
Spain	783	15	571	12.9	776	21.3	1058	24.8	1219	24.5
Israel	1170	24.1	1116	26.4	1088	31.3	1205	29.2	1167	24.4
Italy	883	17.3	904	18.8	986	26.6	1106	26.2	1143	21.9
Germany	1339	23.1	1110	22.3	560	15.1	922	20	1138	17.8
Australia	1939	35.1	1920	40.1	1696	45.9	762	17.3	968	14.7
Norway	34	0.6	38	0.7	16	0.4	175	4.2	586	9.6
Hong Kong	700	14	957	22.9	652	18.5	627	15.6	575	11.5
Lebanon	133	2.8	16	0.3	270	7.9	245	4.6	575	8.9
Russia	1190	16.2	368	4.8	363	7.4	352	5.8	547	5.8
Greece	874	16.5	427	9.2	434	12	585	13.9	522	9.6
New Zealand	349	6.4	382	8.2	531	14.4	229	5.5	411	6.9
Kuwait	258	5.1	229	5.3	351	9.8	230	5.7	376	7.8
Bahrain	285	4.8	244	5	286	7.4	454	9.5	287	4.4
Korea Rep.	115	2.1	108	2.2	176	2.2	80	2.1	176	2.9
Malaysia	229	3.7	218	4.8	66	1.7	111	2	132	1.9
Chinese Taipei	209	3.9	146	3	103	2.7	127	3	98	1.6
Others	1212	21	1199	25.4	1780	46.6	2219	52.6	2287	53
Total	76593	1396.1	77076	1630.1	96805	2569.5	89155	2049.6	97550	1776.7

Source: D.G.C.I & S, Calcutta, (P): Provisional figures

Regular shipping facilities are available from India to all ports of the world, the front runner in carrying out shipments being the Kochi port. The other contributing ports are Tuticorin, Manglore, Chennai and Mumbai.

Regular services of container ships are available from Indian ports on India-USA, India-UK/Continent, India-Australia, India-Japan, India-Middle East and India-Singapore routes.

The export of cashew kernel increased from 31,275 tons to 87,000 tons during 1957-58 to 2001-02. While the export value increased from Rs. 0.1453 billion to Rs. 17.90 billion during the same period.

CNSL Export

While studying the role of cashew in the export trade, it is necessary to study the contribution made by the by-product industry, viz., cashew nut shell liquid (CNSL).

Directionwise exports of cashew nut shell liquid from India (Qty in MT, Value in Rs Crores)

Countries	1997-98		1998-99		1999-2000		2000-2001 (P)		2001-2002 (P)	
U.S.A	2095	2.72	100	0.12	620	0.79	653	0.76	799	2.47
Korea Rep.	616	1.11	185	0.46	715	1.71	697	1.35	703	1.41
Japan	1072	1.45	233	0.41	291	0.63	66	0.18	115	0.31
U.K	586	1.71	923	2.49	23	0.09	53	0.18	92	0.29
Korea Dp. Rep	0	0	0	0	0	0	2	0.014	45	0.09
Belgium	0	0	90	0.13	32	0.06	0	0	20	0.11
Spain	0	0	0	0	0	0	469	0.74	1	0.01
Indonesia	0	0	0	0	128	0.21	192	0.29	0	0
Russia	0	0	0	0	0	0	79	0.26	0	0
Romania	0	0	0	0	96	0.18	0	0	0	0
South Africa	30	0.07	0	0	16	0.05	0	0	0	0
Malaysia	0	0	0	0	0	0	0	0	0	0
Germany	0	0	0	0	0	0	0	0	0	0
Others	47	0.11	381	0.6	9	0.02	35	0.12	39	0.22
Total	4446	7.17	1912	4.21	1930	3.74	2246	3.89	1814	4.91

Source: D.G.C.I & S, Calcutta

The export of CNSL was highly fluctuating over the periods. CNSL and its distillation product cardanol are mixtures of a number of components and hence their polymer products may have variations in property profiles from batch to batch. There is long way and vast scope for Indian CNSL industry to develop.

Imports

India is the world largest importer of raw cashew. The rapid increase in global demand made Indian exporters to source globally for raw seeds in the first three decades of independence i.e. from 1947 to

1977. Other cashew kernel exporting countries are hardly imports raw cashew nuts.

India imports raw cashew from Guinea-Bissau, Ivory Cost, Tanzania, Benin, Mozambique, Indonesia, Nigeria etc.

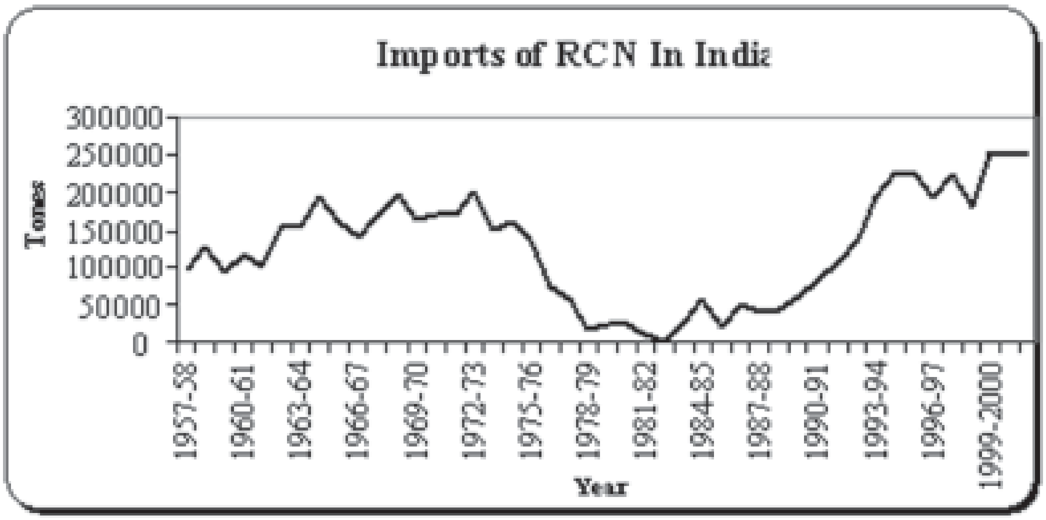
Imports of Raw Cashew in India (1995-96 to 2000-01)

Year	Qty (Tons)	Change % (+/-)	Value (Rs. Mln)	Change % (+/-)	Value US $ Mln	Change % (+/-)
1995-96	222819	-2.32	7600.8	10.01	227.00	3.18
1996-97	212866	-4.47	6876	-9.54	194.09	-14.50
1997-98	247181	16.12	7696	11.93	207.08	6.69
1998-99	241161	-2.44	9580.3	24.48	227.91	10.06
1999-00	253577	5.15	11862	23.82	272.17	19.42
2000-01	249318	-1.68	9608.4	-19.00	210.36	-22.71

Source: DGCI & S, Calcutta, Conversion to US $ as per RBI average rates

Imports of RCN from India (Quantity)

The below graph shows the instability in Indian raw cashew imports.



India's early entry into export trade with lucrative and expanding markets of cashew led to the establishment of many cashew-processing factories in the country.

Imports of raw cashew nut have increased from 71,000 tons in 1956-57 to 0.25 million tons in 2000-01. Value of imports too have increased from Rs. 498 million to Rs. 9.622 billion during the same period.

The level of imports of raw nuts were highest in 1994-95 & 1999-2000, with the purchases being stood at 0.228 million tons & 0.25 million tons valued at Rs. 6.90 billion & Rs 11.862 billion respectively. There was an increasing trend in imports in the 90's. East African countries, particularly

Tanzania and Mozambique have been the major sources of supply of raw nuts to India.

As already mentioned, the level of imports have declined steadily in the 70's. The main reason for the decline in imports was the import policy of the government. Up to 1970 private importers used to import large quantities of raw nuts at high prices from the international markets. This prevented the import of raw nuts by majority of the processors. In order to ensure equitable distribution of imported nuts, government of India introduced the policy of canalization. Under this policy the entire import was centralized and canalized through the Cashew Corporation of India established in 1970. However, past experience has revealed that the new policy has impeded the imports. This is mainly because of unorganized collection of raw nuts in the East African countries. Further, the monopoly trade of imported nuts by the Cashew Corporation though controlled prices, dampened the enthusiasm of growers and collection agencies in procurement operations. It is reported that this policy encouraged the East African countries to set up processing units. Further, the lower rates offered by the Cashew Corporation led to diversion of exports to competitors.

In view of the difficulties experienced by the industry, the government of India has revised the import policy permitting the import of raw nuts under Open General License (OGL). Therefore, there was increase in growth rates of imports of cashew kernel in 90's.

Further, the import of cashew is likely to suffer in the years to come, as more and more countries are resorting to processing and imports of cashew kernel. International development agencies have recognised cashew cultivation and processing as an effective poverty alleviation measures in developing countries. They are providing funds to Africa and Southeast Asia for the development of cashew industry. Development of the cashew processing in those countries would affect India's import of rawnuts.

In addition to this Vietnam has emerged as a major competitor to India in the East Asian markets like Hong Kong, Taiwan, Japan, China, Malaysia, Thailand and Singapore. India, which used get around 30,000 tons of raw nut every year from Vietnam until a few years ago, could not able to import three digit raw cashew nuts from 1996-97 and in recent years it is almost stopped. Vietnam has also levied export duty on raw cashew nut. All these factors point to the fact that India cannot maintain its prime position in the world market, by depending on imported raw cashew nut for making up the shortfall in the availability of raw cashew nut for the domestic market.

If we closely observe the data and the result it is evident that in future it is very difficult for Indian processing factories to source raw cashew nuts from other countries as they started processing in their own countries. Eventhough the prediction shows there is upward trend in imports of raw cashew in the coming years, in realistic it may not come true due to unavailability of raw cashew nut. Instead of spending nearly Rs.9.00 billion on raw cashew nut imports every year, processing it and re-exporting, India can develop commercial cashew plantation on wastelands and forest areas. By this there will be stability in raw cashew availability, and thus exports will be stabilized and the foreign exchange can also be saved along with wasteland development.

Constraints to Export Development

Area and Production

Eventhough cashew is having 400 years history, it **remained as a neglected crop**. It is a plantation crop in all countries except India. Cashew though for all practical purposes is viewed as a plantation crop is not administratively given a plantation status. It is grown in wasteland/poor soil, which is unsuitable for the cultivation of any other remunerative plantation corps. The yield per tree tends to be therefore very low.

Majority of the trees were **over aged** and their productivity has come down. A considerable area under cashew plantation is under high degree of senility due to the inferior genetic stocking and improper management of plantations. There is a need for replantations of aged cashew trees.

The quantity of raw nuts available for processing has dropped short of the requirements for full use of the capacity of processing units. The insufficient raw nuts have brought about reduction in the days of employment for the large number of workers, who depend on cashew processing. Less capital investment and huge profit have acted as incentives for creation of additional capacity. However, under utilisation of capacity and severe under employment of labour in the existing factories are increasing. If cashew plantations are not developed with a far sighted view, the future of these communities would become very sad. There is a need for increasing production of raw cashewnut to make the country self-sufficient.

Processing

Procuring quality raw nut

Procurement of raw nuts is mostly based on **personal experience and floating or cutting results** form the criteria for fixing the price. Due to this, raw nut moisture content has to be taken into consideration along with prescribed quality standards, while fixing up the price.

Increasing raw cashew nut shelf life

The warehouse for raw nuts must be treated with special/utmost care for maintaining the nuts at a safer level of moisture by exercising control over the environment there. Control can be achieved by good ventilation and using new fumigated bags. For adequate aeration, free space must be there between two stacks in a row. The quality of nuts and their environmental condition during storage is also a factor on which the storage life of raw cashew depends. Moisture condensation in godowns at certain pockets and consequent microbial growth result in delirious fluctuating temperatures at the godowns. Relative humidity of the atmosphere plays a vital role in safe storage of raw nuts. The nuts absorb or desorb moisture for maintaining equilibrium with relative atmospheric humidity.

Increasing recovery of white kernels

In the case of steam boiling, steam pressure and duration must be optimised for various origin nuts with rotational speed (rpm) of drum and feed rate. In borma dryer, the temperature and duration of drying must be optimised and thermostatic control must be included in the design of borma dryer for uniform drying.

Minimisation of labourers' drudgery

An improved cashew-shelling unit must be developed for minimising the drudgery of the labourers who operate the shelling unit and avoiding the CSNL effect on the hands of the operator.

Kernel scorching in borma dryer

Uniform circulation of hot air must be maintained at constant temperatures all through the process in the tunnel dryer by providing thermostatic control.

Maximising whole kernel recovery in peeling process

One can try mechanical means for peeling the testa automatically, i.e., puncturing the testa layer and peeling through forced air.

Over coming cumbersome vita packing system

For this, the flexible packaging system with NO_2 gas infusion or moulded vacuum packaging may be followed. This will bring down the packaging cost to a great extent.

Export Marketing

Due to **inadequate indigenous production**, the industry is forced to import over 250,000 tons of raw cashewnut annually, mainly from African countries for export processing. India earns around Rs. 20 billion per annum through export of cashew and to realise this, the country is spending over Rs.9 billion for importing raw cashewnut. For this the Indian processors have to incur about 30% more in cost compared to the local cashew processing industry in those countries, which makes them non-competitive. Primarily, the export of cashew kernel depends upon imports of raw cashew nuts and domestic raw cashew nut production. Cashew kernel exports, by and large is not stable mostly due to the non-availability of raw nut for imports and unpredictable domestic production.

Trade Policies

There should be **equality in tax rates** of all states for raw cashew. Presently it is in the range between 0% and 7.5% causing distortion in the pricing structure.

Some of State Governments must act to improve the APMC or remove raw cashews from regulations, as it is an impediment. The APMC has levied 1 per cent market fee even on imported raw cashew while manufacturers are paying a similar fee for imports, which amounted to paying **double fees**. The industry has been facing the same problem i.e. of double taxation, as the government considers raw cashew and cashew kernel to be two separate commodities because of which sales tax and turnover tax are payable both on the input and the output. The cashew industry is burdened with 8% taxes at the purchase and sale points.

The present system of **issuance of the DEPB** (Duty Entitlement Pass Book) by the Joint Director of Foreign Trade, regarding port registration has made it obligatory for the importers to import through the same port. While the option of TRA (Transfer Release Advices) is available to the exporter, often the procedure involved in this makes it difficult for the exporter to freely sell this in the market.
Two separate columns should be provided in the **DEPB** for port of registration for imports and port of registration for exports, so that the exporter has the option to export and import his commodity through any of the ports. Otherwise, exporters choosing to ship their cargo through smaller ports will find their DEPB not in demand as most of the imports take place through major ports only.

The **requirement of Import Permits for Agricultural Commodities** effective from June 1, 2001 is posing hardships to importers of raw cashewnut. Realising the necessity of raw cashewnut imports (since domestic raw nut production is insufficient), so, the Centre should place the commodity under the Open General Licence.
The Cashew Export Promotion Council has urged the Ministry of Agriculture to exempt raw cashewnut from the purview of the above notification and to remove the hurdles in the import of raw cashewnut.

In view of the difficult circumstances the export trade was subjected during the current year and taking into consideration the seasonal nature of the industry, it is imperative to give necessary instructions to the nationalised banks to refund the excess interest debited by them.
There is a need to **extend the period of export finance** for cashew industry upto 360 days at the concessional rate of interest. At present the state-run banks have granted extension for finance upto 270 days with penal interest of 3.5 percent to 4.5 per cent, which is about 50% above the normal rate of interest for export credit.

The **premium payable to Export Credit Guarantee Corporation** (ECGC) is counter productive to export growth. The banks while advancing export credit (packing credit) ensure that adequate comprehensive insurance policies are taken to cover all the risks under the sky for the pre-shipment period. The banks also cover the post-shipment risk by collecting the ECGC premium on export realisation. The additional burden of ECGC premium on the entire working capital of the industry for the pre-shipment period @ 0.07% per month is addition to the burden of normal coverage in the form of a comprehensive policy is superfluous and needs to be scrapped.

With a view to encourage exports, certain state governments have passed orders for **refund of the purchase tax on raw material procured** by the exporters within the respective states and used for the purpose of export. However the Cashew Export Promotion Council maintained that the mediation of the Commerce Ministry is required to make sure that all such legitimate claims are reimbursed immediately without delay. Net working of the Commerce Ministry with the Ministry of Science and Technology is required to expedite proposals coming under the Department of Scientific and Industrial Research (DSIR) schemes. It also recommends for a single-window arrangement to redress all the grievances.

Identification of Technical Assistance Projects

Area, Production and Harvesting

Increase domestic raw cashew nut production

The production of raw cashew nuts in the country is far below the requirement of the processing sector and potential available for export. The production of raw cashew nuts is only around 0.45 million tons obtainable from 0.76 million hectares of cashew. This production is very less when compared to demand put forth by the industry. Primarily, the export of cashew kernel depends upon imports of raw cashew nuts and domestic raw cashew nut production. Cashew kernel exports, by and large is not stable mostly due to the availability of raw nut for imports and unpredictable domestic production. There is a huge domestic and international market potential for these products, which should be reaped, for which proper marketing strategies should be planed.

The Department of Wastelands Development, Government of India has included **cashew as a crop for wasteland development** in the country. So, there is a ray of hope that India will be self-sufficient in raw cashew production if wastelands are used for this purpose. It also provides financial assistance up to Rs.2.5 million to farmers who take up cashew cultivation under approved wasteland development programmes. Many private entrepreneurs and farmers are keen to develop cashew plantations but they are not able to do so because of land ceiling laws.

Export marketing

Strengthening the non-traditional markets and exploring new ones

The US is the major importer with around 46 per cent share followed by Netherlands with 18 per cent. It is a known fact that the Indian cashew industry is heavily dependent on international markets. Over dependence on one or two nations will adversely reflect on India's capacity to bargain for better prices even with a quality product, considering the size of the major market. There is a need for diversification of the market by strengthening the market in low intake counties such as Japan, Australia, Saudi Arabia, Kuwait etc and developing new ones like South Korea, Sweden, China, Belgium, Norway, Turkey etc. At the same time, India should sustain its relationship with the buyers in the traditional and established markets.

The key move in existing market should be improve information, study the value chain, remove irritants and obstructions, focus on non-price issues like costs, quality, logistics, possible innovations and education of the consumer.

The scope for searching for new customers is high where individual incomes are high and present per capita cashew consumption is low.

Export in value added form

Over 99% of Indian cashew go in bulk packaging and as plain cashew kernel. These are imported by big wholesalers in the consuming countries, repacked in retail packs either as such, or after roasting and salting and sold to retailers. These retail packs are marketed under well-established brand names of the local packers. It is quite unfortunate to note that even with over seven decades of experience in international trade in cashew kernel, Indian export of cashew kernels in value-added forms/consumer

packs constitutes less than 1 per cent and its value is less than Rs. 0.1 billion.
Value addition can be done by exporting spicy, yoghurt, sugar, chocolate, honey coated cashew and salted and roasted cashew etc in addition to exporting different forms of cashew like ground, granulated, paste and powered forms.

Branding

Brand promotion has to be undertaken by individual exporter with financial assistance from the CEPC. Consumers in the developed world are used to identifying quality with individual brands and hence they go in for individual brands based on their own perception of quality. There is a huge domestic and international market potential for these products which should be reaped, for which proper marketing strategies should be planed and implemented.

Organic Cashew Export

The international market for organic food is booming. The whole organic market is worth around US $15 billion. At present, India as a biggest processor/exporter of cashew kernels doesn't participate in the organic market for cashew. In India a good amount of raw cashew is produced organically, but it is not differentiated from non-organic raw cashew. Indian exports of organic cashew products are still in an infant stage.

Others

The **database on cashew is weak** and in order to strengthen it there should be an assessment cell. In the absence of a Commodity Board or Export Development Authority, the Cashew Export Promotion Council is the only national Organisation to look after the export development activities. There should be a scheme for statistical survey for area and production of cashew in the country since the current procedure adopted is erroneous.

Value addition in cashew is another area, which needs much attention by Researcher. Value addition can be done by exporting spicy, yogurt, sugar, chocolate, honey coated cashew, salted, roasted cashew, low oil and high protein cashew kernels etc in addition to exporting different forms of cashew like ground, granulated, paste and powered forms.

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Statistics

Raw Cashew Nut Production Statistics of India

A. Statewise raw cashew nut production in India (MT) (Calender year)

State	1998	1999	2000	2001
Kerala	100000	80000	100000	60000
Maharashtra	60000	60000	75000	50000
Andhra Pradesh	50000	50000	70000	75000
Orissa	45000	20000	25000	25000
Karnataka	35000	20000	25000	25000
Tamil Nadu	30000	30000	30000	30000
Goa	25000	20000	15000	20000
West Bengal	6000	10000	6000	6000
Others	9000	10000	4000	10000
Total	360,000	300,000	350,000	301,000

B. Statewise raw cashew nut production in India (MT) (Financial year)

State	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97
Kerala	143200	151600	140200	119200	140000	134000
Maharashtra	31960	43750	46860	37600	69000	80000
Andhra Pradesh	40360	44880	46570	58700	71700	60000
Orissa	31840	39060	43420	37200	43000	40000
Karnataka	26750	31260	31540	26400	37600	52000
Tamil Nadu	12710	19190	19200	22000	30930	30000
Goa	14490	15450	16210	16960	17800	20000
West Bengal	3660	3660	3990	3280	6960	6000
Others	340	340	360	300	840	8000
Total	305310	349190	348350	321640	417830	430000

State	1997-98	1998-99	1999-2000	2001-02*
Kerala	100000	130000	100000	87000
Maharashtra	60000	85000	125000	103000
Andhra Pradesh	50000	80000	100000	86000
Orissa	45000	50000	40000	59000
Karnataka	35000	40000	60000	40000
Tamil Nadu	30000	35000	45000	46000
Goa	25000	20000	30000	30000
West Bengal	6000	10000	8000	7000
Others	9000	10000	12000	12000
Total	360000	460000	520000	470000

C. Statewise raw cashew nut production in India (Financial Year), Qty in 000' MT

	AP	Karnataka	Kerala	Maharashtra	Orissa	India
1972-73	10.1	10.5	86.8	3.7	1.5	129.8
1973-74	12	11.3	89.8	3.6	2	135.5
1974-75	12.8	12.3	95.9	4.2	2.5	144.3
1975-76	12.6	15.2	107.2	4.2	3.9	161.5
1976-77	12.5	15.2	107.5	4.3	3.9	162.5
1977-78	13.4	15.7	108.2	4.8	4	165.3
1978-79	14	16	110.5	7.2	4.3	171.8
1979-80	16	16	116	6	5	180.3
1980-81	16.5	16.5	117	8	6	185.2
1981-82	20	18	118	10	8	195.8
1982-83	20	19.1	120.9	10	8.5	201.4
1983-84	22.2	19.1	123.7	12.4	10	210.9
1984-85	24.4	19.9	126.6	14.1	11.8	221.3
1985-86	26.8	20.9	128.9	15.8	16.9	234.5
1986-87	29.1	22	130.9	19.1	18.6	245.6
1987-88	31.9	22.9	134	21.4	22.3	260.3
1988-89	34.3	23.7	136.9	24.4	26.8	274.3
1989-90	36.6	24.6	139.5	27.1	28.6	285.6
1990-91	37.8	25.8	142.1	29.5	29.1	294.6
1991-92	40.4	26.8	143.2	32	31.8	305.3
1992-93	44.9	31.3	151.6	25.6	39.1	349.4
1993-94	46.6	31.5	140.2	28.3	43.4	348.1
1994-95	50	33	149	31.2	46.5	371.2
1995-96	72.4	123.2	96.8	71.3		417.8
1996-97	60	52	134	80	40	430
1997-98	50	35	100	60	45	360
1998-99	80	40	130	85	50	460
1999-00	100	60	100	125	40	520

D. Raw cashew production in India (Financial year)

Year	Production (MT)
1955-56	79472
1960-61	111409
1961-62	113427
1962-63	119594
1963-64	132719
1964-65	140806
1965-66	143818
1966-67	149182
1967-68	157542
1968-69	163938
1969-70	176219
1970-71	176723
1971-72	183000
1972-73	177314
1973-74	178451

Year	Production (MT)
1974-75	166156
1975-76	171438
1976-77	140257
1977-78	143123
1978-79	133736
1979-80	141832
1980-81	185250
1981-82	195760
1982-83	201440
1983-84	210870
1984-85	221330
1985-86	234480
1986-87	245580
1987-88	260260

Year	Production (MT)
1988-89	274330
1989-90	285590
1990-91	294590
1991-92	305310
1992-93	349390
1993-94	348350
1994-95	321640
1995-96	417830
1996-97	430000
1997-98	360000
1998-99	460000
1999-00	520000
2001-02*	470000
2002-03*	500000

* Estimated

Raw cashew nut imports from India

A. Raw cashew nut imports from India (Calendar year) (Qty in MT)

Country	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Benin	2341	3495	6210	7185	9786	6872	834	4166	5818	27995	27143
Gambia	0	0	0	1113	65	214	1522	0	483	180	243
Ghana	0	0	0	595	147	445	0	2369	1563	3403	3475
Guinea Bissau	4911	12803	9058	40810	29156	8224	33765	18572	23303	59106	60260
Indonesia	4323	11829	13517	15821	13706	16563	6089	29639	13138	10679	16287
Ivory Coast	7123	9531	5821	19677	23793	9820	30223	25498	16430	47602	50169
Kenya	0	0	0	720	0	186	0	0	509	4964	5029
Madagascar	1851	727	348	1755	3138	0	999	0	0	0	0
Mozambique	0	5324	14777	20808	7665	25264	506	17323	20874	11855	18223
Nigeria	5674	12981	8667	11887	17132	6916	7881	7799	7966	9899	10742
Philippines	1376	286	1148	647	778	302	0	1052	0	0	0
Senegal	742	253	1132	2420	2893	1193	1727	1626	4905	1030	4993
Singapore	4092	255	5957	39345	15022	19619	33062	292	99	374	224
Tanzania Rep	14707	27003	38368	56374	51346	80326	40215	83154	56537	55803	66484
Togo	287	894	276	204	1489	463	215	251	167	13027	121
Vietnam	27514	41333	26966	44055	14109	0	0	0	0	0	0
Others	43	972	3776	255	794	2195	5234	4219	3930	6414	4725
Total	74984	127686	136021	263671	191019	178602	162272	195960	155722	252331	268118

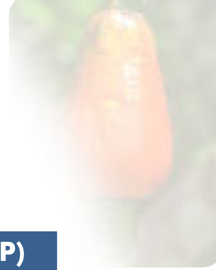
B. Raw cashew nut imports from India (Financial year) (Qty in MT)

Origin	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96
Tanzania	10740	21050	27730	60960	46190	75270
Guinea Bissau	8400	16920	5500	16100	28420	30990
Ivory Coast	4830	7550	8790	16910	10170	24640
Mozambique	0	1380	13970	18670	6880	20110
Indonesia	2140	12970	11540	19200	19080	15690
Benin	1160	2440	3580	6390	6990	9870
Nigeria	13250	5170	12510	10610	9960	19530
Kenya	50	0	0	240	480	0
Senegal	1020	990	1130	1220	1260	3830
Ghana	0	0	0	0	0	0
Madagascar	0	1580	270	350	2990	1900
Togo	1430	290	940	230	200	1590
Vietnam	33740	28640	39880	31850	39180	14110
Philippines	1220	1380	290	1150	650	780
Sub-Total	77980	100360	126130	183880	172450	218310
Others	4660	5720	8850	7440	55660	4510
Total	82640	106080	134980	191320	228110	222820

C. Monthwise imports of raw cashew nuts in quantity and value terms (Qty in MT, Value in Rs.Crs)

	1992		1993		1994		1995		1996		1997	
	Qty	Value	Qty	Value	Qty	Value	Qty	Value	Qty	Value	Qty	Value
January					41250	112.85	25900	82.40	27300	98.85	33900	113.35
February					38700	96.35	13100	37.40	30600	110.70	19700	60.50
March					19300	52.00	13700	43.20	22700	79.65	16300	52.05
April					31000	86.25	5000	17.50	11800	38.35	14700	38.50
May					23700	70.85	5600	19.05	6500	22.50	3800	13.80
June			16750	40.40	16100	50.65	5000	15.00	0	0.00	12200	37.50
July			14400	40.30	14300	36.70	21600	66.80	15550	55.75	20800	80.30
August	3000	5.20	8250	19.95	19600	55.00	26100	72.90	18850	69.50	7500	24.50
September	500		12700	28.00	15500	50.80	19800	60.05	9350	29.90	20620	57.00
October	16000	43.50	5700	11.85	16700	53.30	21500	83.60	18300	63.60	11454	34.04
November	4100	9.00	21200	52.90	9700	30.00	12000	45.75	10200	30.90	1856	6.09
December	2250	5.50	6700	15.95	28200	87.00	21100	80.60	25700	84.80	31098	110.10

	1998	1999	2000	2001	2002					
	Qty	Value	Qty	Value	Qty	Value	Qty	Value	Qty	Value
January	40406	139.38	29399	136.69	17324	89.70	28767	92.40	43503	126.87
February	26460	89.74	13682	48.64	38265	195.31	10206	30.10	21405	65.35
March	13654	48.66	4686	20.74	14421	72.50	8777	25.52	6931	19.92
April	9356	27.58	4705	19.90	6202	23.25	6131	16.44	7227	19.31
May	8601	26.99	9458	37.37	12780	50.55	15585	39.10	37358	97.14
June	16167	60.92	16244	67.86	30971	115.55	25630	58.73		
July	19138	65.06	11392	47.26	33628	171.82	59560	148.00	67920	204.16
August	9477	36.26			36055	150.83	33426	82.50	38794	128.73
September	4186	16.72	19543	95.80	18650	78.20	41617	104.19	32426	112.02
October	6952	27.01	6635	30.52	17136	73.10	23596	65.57	24296	81.58
November	11834	43.16	21021	109.60	12841	51.23				
December	33491	139.34	37133	163.19	26347	95.69				



D. Imports, originwise, Qty & Value (1995-96 to 2000-01) (Qty MT, Value Rs. Crs)

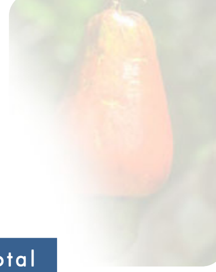
	1995-96		1996-97		1997-98		1998-99		1999-2000		2000-01 (P)	
Countries	Qty	Value	Qty	Value	Qty	Value	Qty	Value	Qty	Value	Qty	Value
Guinea Bissau	30987	114.6	15455	53.2	50522	160.5	18828	79.1	31231	156.4	56929	270.39
Ivory Coast	24642	78.7	18096	52.0	32229	83.4	23085	80.2	39524	162.6	50219	189.87
Tanzania	75275	268.3	64355	212.1	61311	211.0	108046	458.9	79209	417.4	50821	177.08
Benin	9870	29.2	10213	32.3	16140	49.8	11680	39.4	23829	98.9	27239	105.61
Mozambique	20108	59.1	28101	87.3	16895	48.9	28162	104.2	23508	105.9	20822	62.14
Indonesia	15696	61.1	6862	22.8	32628	109.6	18829	71.9	20941	96.4	9178	38.76
Nigeria	19529	57.5	14507	37.0	13220	34.4	7699	23.0	13001	45.7	10859	31.94
Senegal	3829	14.0	1679	6.0	1818	5.9	6297	27.0	9360	46.3	6679	22.8
Kenya	0	0.0	1004	2.8	79	0.3	9428	40.6	6311	29.2	6382	21.88
Ghana	0	0.0	632	2.0	3725	11.3	1795	6.4	3198	12.9	3475	13.41
Australia	0	0.0	0	0.0	969	2.4	0	0.0	168	0.7	184	0.57
Togo	1586	5.0	463	1.4	265	0.7	334	1.2	167	0.7	121	0.4
Malagasy Rep.	1901	6.6	2661	7.8	0	0.0	1686	5.8	1135	4.2	0	0
Singapore	303	0.9	44758	157.7	7608	22.8	246	1.1	360	1.5	0	0
Philippines	778	2.5	302	1.0	103	0.3	981	4.1	0	0.0	0	0
Vietnam	14109	49.7	0	0.0	4529	13.7	0	0.0	0	0.0	0	0
South Africa	0	0.0	920	3.0	2022	5.9	0	0.0	0	0.0	0	0
Cameroon	0	0.0	0	0.0	1521	4.6	0	0.0	0	0.0	0	0
Others	4206	13.0	2858	9.2	1598	4.1	4065	15.1	1635	7.4	6179	27.29
Total	222819	760.1	212866	687.6	247181	769.6	241161	958.0	253577	1186.2	249087	962.14

E. Yearwise Imports, Qty & Value (1955-56 to 2001-02)

Year	qty.(M.T.)	value ('000)
1955-56	63154	44260
1956-57	71020	49773
1957-58	99081	69440
1958-59	125400	76484
1959-60	95950	72600
1960-61	118321	96082
1961-62	101876	67022
1962-63	155331	91227
1963-64	157458	109320
1964-65	191523	164385
1965-66	160636	150603
1966-67	141021	212432
1967-68	168218	250837
1968-69	195528	313367
1969-70	163426	275994
1970-71	169359	294076
1971-72	169985	279060
1972-73	197938	318093
1973-74	150249	287986
1974-75	160358	366043

Year	qty.(M.T.)	value ('000)
1975-76	137196	335578
1976-77	75122	183299
1977-78	56299	179817
1978-79	20496	91633
1979-80	24326	116255
1980-81	25625	194812
1981-82	11700	183650
1982-83	1485	14090
1983-84	26877	221178
1984-85	56161	388447
1985-86	21945	243672
1986-87	49149	711600
1987-88	42609	643800
1988-89	45150	613700
1989-90	59591	828600
1990-91	82639	1340000
1991-92	106080	2666800
1992-93	134985	3763300
1993-94	191322	4827000
1994-95	228109	6909400

Year	qty.(M.T.)	value ('000)
1995-96	222819	7600800
1996-97	192285	6406000
1997-98	224968	7440000
1998-99	181009	6802400
1999-2000	253577	11862000
2000-2001	249087	9621400
2001-2002	250000	



Cashew kernel exports from India

A. Countrywise and monthwise exports of cashew kernels from India

2001

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
Australia	2800	2100	450	700	4250	2800	3750	5050	8800	4370	4400	5900	45370
Belgium	5090	2150	2150	700	5000	8600	1400	2150	9240	5050	2150	2150	45830
Canada	4900	5725	5600	2800	8750	9800	4900	10150	15750	5600	7000	6300	87275
Far East	1400	2150	0	2100	3150	2800	0	0	4150	1900	4500	6925	29075
France	9800	9100	7050	8450	7000	10600	8400	4200	20750	11450	8750	5200	110750
Germany	2800	5600	3500	4900	3300	7700	2100	2100	4900	4970	2850	6300	51020
Greece	2455	2380	0	0	3150	1400	700	700	3500	4200	6300	1400	26185
Hongkong	3480	700	2100	3480	700	1400	1400	700	2800	2800	6300	4700	30560
Israel	3500	4850	9100	4900	6300	1400	1400	1400	8400	6300	5600	2450	55600
Italy	6350	7000	3500	1400	4250	4500	2800	4200	11200	2100	2850	4785	54935
Japan	23740	21200	14865	18035	22000	11350	9350	5750	22100	20495	13450	13850	196185
Lebanon	700	2100	1400	750	1450	0	3500	1400	4200	2800	1400	600	20300
Middle East	24700	30445	25610	30975	26900	23250	6150	17860	52645	26925	26805	25075	317340
Netherlands	35575	52080	48300	56750	50400	30250	37850	38050	78880	63820	67045	51850	610850
New Zealand	1400	0	700	1400	1400	2800	1400	1540	3500	3550	1450	1450	20590
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0
South Korea	275	500	4435	0	700	1400	0	850	450	700	0	700	10010
Spain	3500	5600	3500	6300	5000	8400	2900	4200	6900	5000	2100	5650	59050
Taiwan	700	0	700	0	700	0	0	0	0	0	0	0	2100
U.K.	16800	16800	26650	17550	31550	21500	18200	18200	45050	40000	23800	14750	290850
U.S.A.	173200	159180	135885	136950	145850	188005	158960	146050	238375	259750	196950	199040	2138195
U.S.S.R.	700	700	2690	1400	2100	1400	1400	2100	5820	4900	2150	700	26060
Total	323865	330360	298185	299540	333900	339355	266560	266650	547410	476680	385850	359775	4228130

2000

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
Australia	2100	4950	2800	2100	1400	4200	4200	2800	5170	4245	1100	4320	39385
Belgium	6800	1400	4200	4900	1400	700	4900	4900	2100	3500	4200	3600	42600
Canada	5600	4100	8350	1400	7700	5700	5600	4900	8400	4200	4900	2100	62950
Far East	5650	700	3250	700	0	700	890	1400	2100	2100	4630	6300	28420
France	7000	8050	7000	6980	7680	5600	9080	16100	11025	14725	14750	10720	118710
Germany	700	0	0	3500	700	2100	0	0	0	1400	700	1400	10500
Greece	3500	1400	2100	700	4200	0	2800	2100	2100	2800	3500	2760	27960
Hongkong	2800	700	1900	2080	2700	1400	2800	1900	2850	2100	5450	4700	31380
Israel	7000	5600	4530	2800	2800	4200	4900	5600	2800	2100	4200	2800	49330
Italy	3500	3500	1900	4880	4200	2800	2850	3550	2100	2100	2890	5600	39870
Japan	14170	16800	24500	19650	32900	14050	16950	15570	12700	21300	14100	20800	223490
Lebanon	2100	2800		0	0	700	700	2800	2800	700	700	700	14000
Middle East	18370	32845	26575	32735	19235	17620	16495	25270	30890	26630	23340	17550	287555
Netherlands	57820	60700	93800	78750	64400	67900	101500	79800	66500	61950	57400	45500	836020
New Zealand	1380	1400	2780	0	2080	700	1380	680	1400	100	1100	0	13000
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0
South Korea	300	750	0	100	1000	0	200	550	150	150	300	1125	4625
Spain	700	3500	6000	4200	4200	2100	4200	2100	2800	3500	3500	5340	42140
Taiwan	700	700	0	0	2080	1400	0	0	700	0	700	1400	7680
U.K.	12275	7000	9800	11900	24850	27300	40200	33665	23100	20300	22190	15840	248420
U.S.A.	144550	141400	145470	180950	183400	135870	183750	153650	112375	180115	165730	139670	1866930
U.S.S.R.	2100	4200	3500	2800	2100	700	0	1000	3500	700	1400	1400	23400
Total	299115	302495	348455	361125	369025	295740	403395	358335	295560	354715	336780	293625	4018365

1999

	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Total
Australia	9850	9950	8540	7000	11550	7120	14550	7000	9150	7700	5670	5600	103680
Belgium	2800	2100	2100	1400	2800	700	2800	700	700	0	0	2100	18200
Canada	2800	1400	3500	3500	7000	2100	7700	5600	10500	5600	2100	6300	58100
Far East	5480	700	1400	0	0	1400	115	0	2300	200	3500	24590	39685
France	4180	2800	7670	4860	9060	9410	9270	10950	9100	8400	10470	8460	94630
Germany	1400	2100	2800	700	1400	2100	4200	0	4950	700	1400	2100	23850
Greece	2800	0	700	0	700	0	700	3500	1400	700	2100	2625	15225
Hongkong	6920	2800	700	0	1400	2140	700	3450	1400	4900	2800	4200	31410
Israel	2100	3500	3500	3500	4900	4200	6300	700	4200	2100	2800	6300	44100
Italy	2100	4200	5300	2100	2100	2100	4640	3500	4200	7700	1400	5900	45240
Japan	15400	14060	16830	12600	11900	18350	24500	14700	18900	18900	14815	16800	197755
Lebanon		0	700	0	2100	700	0	0	0	3500	0	0	7000
Middle East	15650	19325	23205	9740	15820	8425	13600	11425	17900	21215	22810	34205	213320
Netherlands	50750	39890	87760	58060	56000	71500	68950	94150	63700	75400	95900	89090	851150
New Zealand	4200	0	700	2080	1050	2150	680	1400	700	1400	2130	0	16490
Portugal	0	0	0	0	0	0	0	0	0	0	0	0	0
South Korea	1300	200	300	0	0	0	0	0	0	200	270	200	2470
Spain	1400	1400	2100	1400	4900	4200	4850	2800	4200	2100	2100	4200	35650
Taiwan	0	700	700	0	700	700	0	700	0	700	1400	700	6300
U.K.	10500	17190	28000	24500	23100	24150	35000	37800	30800	35000	27300	25900	319240
U.S.A.	148750	108500	147730	140000	185590	200110	256780	231390	151400	150615	159570	262760	2143195
U.S.S.R.	0	0	0	0	700	0	3010	1400	2800	2100	1620	2800	14430
Total	288380	230815	344235	271440	342770	361555	458345	431165	338300	349130	360155	504830	4281120

B. Monthwise exports of cashew kernels from India

	1995		1996		1997		1998	
	Qty	Value	Qty	Value	Qty	Value	Qty	Value
Jan	254300	95.70	168300	73.35	220000	87.70	288922	122.25
Feb	224100	85.40	169400	73.75	148100	61.30	208942	87.47
Mar	256200	94.40	297600	126.15	236200	95.70	161183	70.28
Apr	268100	95.50	212900	88.30	234400	101.25	243148	108.80
May	251500	88.70	285200	122.15	325300	123.30	252283	108.97
Jun	261800	94.00	286500	135.46	369400	138.15	309203	140.82
July	299500	112.00	345000	148.50	228300	99.05	300473	139.02
Aug	281900	114.50	335700	146.75	260700	109.15	348840	170.41
Sep	188400	79.85	204500	72.60	309560	122.07	158584	80.63
Oct	252700	107.45	232400	102.75	236370	93.78	261311	133.35
Nov	270300	121.40	253000	106.15	205240	81.97	229268	11.41
Dec	307600	135.10	249500	104.05	276090	112.09	205680	102.82

C. Yearwise Exports, Qty & Value (1955-56 to 2001-02)

Year	qty.(M.T.)	value ('000)
1955-56	31359	0.129246
1956-57	31275	0.145345
1957-58	36735	0.151568
1958-59	41020	0.158525
1959-60	38389	0.160514
1960-61	43625	0.18913
1961-62	41755	0.181705
1962-63	48555	0.193613
1963-64	50994	0.214147
1964-65	55676	0.290615
1965-66	51267	0.273996
1966-67	50756	0.427535
1967-68	51039	0.430391
1968-69	63661	0.609291
1969-70	60625	0.574217
1970-71	50284	0.520658
1971-72	50378	0.613321
1972-73	66278	0.688214
1973-74	52293	0.744322
1974-75	65025	1.181373
1975-76	53640	0.961328
1976-77	51565	1.059861
1977-78	40300	1.495392
1978-79	26877	0.800199
1979-80	37848	1.179114
1980-81	32762	1.40854
1981-82	31537	1.8695
1982-83	31800	1.3536
1983-84	36500	1.508694
1984-85	32374	1.796752
1985-86	37097	2.251121
1986-87	43004	3.275528
1987-88	35971	3.112899
1988-89	33994	2.739324
1989-90	45632	3.6635
1990-91	49874	4.4224
1991-92	47738	6.690885
1992-93	53436	7.4549
1993-94	69884	10.4602
1994-95	77000	12.4628
1995-96	70334	12.405
1996-97	68757	12.8104
1997-98	76323	13.839
1998-99	75026	16.099
1999-2000	96805	26.595
2000-2001	81657	18.785
2001-2002	87000	16

The End