



AfriCashewSplits

The source of the latest crop and price information

Week 32: August 04 – 08, 2025 – N°14

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The International Cashew Market

The market has remained stable over the past two weeks. Cashew kernels have traded in a relatively narrow range. The market price is supported by a strong export performance in Vietnam signalling robust demand in markets around the World with the exception of North America. For the first time in history, the North American market was relegated to third place after the EU and China in January-July exports from Vietnam. Shipments to China and West Asia are both up by 30%. EU shipments are similar to last years strong performance. The US and Canada are down by 26%. This strong demand should ensure that prices remain in the current range, at least for the short term.

RCN prices have been steady over the past two weeks. Continued good demand from the major processing countries and improved processing volumes in African countries have meant that a steady demand without any willingness to chase the market higher has been evident. Production estimates continue to increase as export shipments are reviewed. It now looks that, if East African crops come in as forecast, there will be a record production in 2025.

Attention is now turning to southern hemisphere crops. About 18% of the worlds cashews are harvested between September and December. Current forecasts indicate good progress in the major producers – Tanzania, Indonesia, Mozambique and Brazil. In the largest producer, Tanzania, there are some concerns on the weather conditions in southern regions, but larger crop than last year is expected. Based on current estimates circa 900,000 tonnes could be harvested in the next four months with 55% of that from Tanzania. This should ensure adequate supply for the rest of the year and the first quarter of 2026.

RCN Cfr prices offered in USD per MT

COUNTRY		Calendar week 32 (August 04 – 08, 2025)	
		US\$ per ton	Outturn in lbs.
COTE D'IVOIRE	Cfr India/Vietnam	1300 – 1350	44 – 46
Senegal	Cfr India/Vietnam	1,550-1,600	50/51
Guinea Bissau	Cfr India/Vietnam	1,600-1,650	50/52

Worldwide WW320 Exports FOB prices in USD per lb.

COUNTRY	1 year ago,	1 month ago,	1 week ago,	Calendar week 32 (August 04 – 08, 2025)		This week vs last week		This week vs last month	
				Range reported		Variation	Trend	Variation	Trend
VIETNAM	3.30	3.20	3.15	3.05	3.30	No change	Stable	-	Stable
INDIA Export	4.00	3.90	3.90	3.90	4.00	No change	Steady	-	Steady
COTE D'IVOIRE	3.55	3.55	3.45	3.35	3.60	No change	Steady	-	Steady

Please note that markets are volatile – always check prices on the day

19th ACA Annual Cashew Conference and Expo, Tanzania 2025



Register now for the 19th ACA Annual Cashew Conference and Expo and enjoy up to 40% discount off standard Conference rates. Visit <https://africancashewalliance.com/en/form/aca-conference-registration-2025> to register now!

Country Reports

Côte d'Ivoire

The market has remained calm over the past two weeks, with minimal activity at both the farmgate and local buyer levels. Reports suggest that small volumes of RCN are yet to be exported.

The season has been strong in both quantity and quality. The CCA's official production estimate now stands at 1.5 million tons, with an estimated 600,000 to 650,000 tons procured by local processors although some of this may be exported as RCN. The season started as usual with higher outturns and the range was between 46-49 lbs.

Local processing continues steadily and is expected to surpass last year's 450,000 tons. With strong international demand for Ivorian kernels, there is optimism for an increased market share in Europe and the United States.

Guinea Bissau

There have been limited activities in the cashew market in the last two weeks. Most exporters are focused on stuffing and loading cargo for shipment. Most shipments are destined for India, as Vietnam has shown less buying interest this season. The market in India remains subdued. However, prices for Bissau cargo 52/220 quality are holding around \$1,600 per ton and showing signs of firming according to our reporter.

So far, over 100,000 MT has been exported via containers and bulk vessels. Customs declarations have now crossed 220,000 MT, pointing to a record crop this year.

Benin

The season has come to a close, with a relatively quiet period in recent weeks. Local processing continues, and reports indicate that almost all processing units are operational, though most are operating below capacity.

Nigeria

The past two weeks has seen little activities in the cashew market, with reports indicating that nearly all outstanding RCN at the ports have now been exported. Local processors remain active, although some of the approximately 100,000 tons of RCN initially purchased for local processing are said to have been exported instead.

The Nigerian Export Promotion Council (NEPC) has reportedly launched a Cashew Processors Directory to boost investment into local processing and value addition. This initiative aims to link processors with domestic and international buyers, while attracting financial support to strengthen the sector.

Ghana

The Tree Crops Development Authority (TCDA), Ghana's regulatory body for cashew and five other tree crops, has had a busy period under its new leadership, working to raise its visibility, and enforce regulations. On 14th July 2025, the new TCDA Board (2025 - 2025) was officially inaugurated. Subsequently, on 28th – 29th July, the African Cashew Alliance (ACA) and the GIZ/MOVE project held a two-day Cashew Policy Engagement meeting with the cashew representatives on the Board, assuring support to help them effectively represent the sector.

On 28th July, the TCDA also launched the Ghana Tree Crops Investment Fair and Exhibition 2025 alongside its new Communication Strategy. The Fair, scheduled for 29th September to 3rd October 2025 at the Accra International Conference Center, will showcase the investment potential of cashew and other tree crops in Ghana.

Burkina Faso

The season has ended in Burkina Faso, with no activities currently underway. The last batch of RCN has been exported. While some unofficial sources suggest production exceeded 200,000 tons, trade data points to a more realistic range of 120,000 – 150,000 tons.

Local processing remains active. Reports suggest that local processing volume may be increased this year supported by the early season RCN export suspension. We are trying to verify the figures from local processors.

Meanwhile, the Conseil Burkinabè des Filières Agropastorales et Halieutiques (CBF), Burkina's cashew regulatory body, and the CIAB are working together to unlock the full potential of the sector. Their key priority areas include developing clear specifications and certification for RCN trade, creating mechanisms

to facilitate steady supply of RCN for local processors, and rehabilitating unproductive orchards to increase productivity.

Togo

The season has ended, with no major activity across the value chain. The interprofession is currently compiling its official report on the season's performance.

Mark your calendar: the next session of the Global Markets Encounter with Jim Fitzpatrick on Wednesday 3rd September 2025



The poster is for the ACA iFORUMS 2025 African Cashew Alliance Global Markets Encounter. It features a large orange banner at the top with the text "ACA iFORUMS 2025" and "African Cashew Alliance". Below this is a red banner with "Global Markets Encounter" and the tagline "Separating facts from fictions". The date "3rd September 2025" is prominently displayed in a black box. The speaker "Jim Fitzpatrick" is mentioned. The poster also includes a Zoom logo, a smartphone icon, and a world map. It lists the time in EST, GMT, and INDIA. Social media handles for @AfricanCashewAlliance and @Africancashewa are provided. Logos for various partners like the European Union, MOVE, USAID, and SNI are shown at the bottom. A dark brown banner at the very bottom says "A focus on Tanzania".

ACA iFORUMS 2025
African Cashew Alliance
invites you to
Global Markets Encounter
Separating facts from fictions
with
Jim Fitzpatrick
3rd September 2025
5 - 7 AM EST.
9 - 11 AM GMT
2:30PM INDIA
zoom
Webinar ID: 956 3280 2374
Passcode: 2025
In collaboration with
@AfricanCashewAlliance @Africancashewa
USAID **SNI**
A focus on Tanzania

About AfriCashewSplits

In an industry that thrives on information, AfriCashewSplits, ACA's biweekly market newsletter, is your go-to source for reliable cashew market information. With timely and credible data collected by trained market reporters and expert analysis, this newsletter provides actionable market insights, trends and analysis to inform business decisions of members and supporters of the ACA. The wide readership of AfriCashewSplits is evidence of its credibility and reputation among cashew industry players across the world.

We appreciate your feedback.

Share your feedback with us via aca@africancashewalliance.com

Thank you to all our network of reporters and analysts for their contribution to this report.



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