2026 ACA Annual Cashew Conference & Expo

ACA
AFRICAN CASHEW ALLIANCE

SUSTAINABLE CASHEW SUPPLY THROUGH POLICY, INVESTMENT AND PARTNERSHIP

Ghana

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FEDERAL MINISTRY OF INDUSTRY, TRADE & INVESMENT

Presentation on Nigeria Cashew Policy - Validation Results

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Presentation On Nigeria Cashew Policy - Validation Results

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Context

- Where Nigeria stands
- Key challenges
- Why policy was urgent

Validation process

- Framework development & Stakeholder consultation
- Validation workshop results

Architecture and next steps

- NCPO framework
- Export Window Open Date (EWOD) mechanism
- Decade Vision Target 2025-2035

"The Nigerian Cashew Sector Policy Framework 2025–2035 is the first nationally validated policy instrument for the cashew sector — developed by the sector, for the sector, under Ministerial authority, awaiting FEC approval"

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Where We Are:

300-350 MT
Annual Production

#6
Global Ranking

#3
Africa Ranking

~102,000 MT
Installed Processing Capacity

~15%
Crop Processed Locally

~47%
Capacity Utilization

Context: Nigeria's cashew sector operates well below its potential. With 102,000 MT of installed processing capacity and ~15% of the crop processed locally, the sector leaves over 85% of value unrealised. Operational factories number only ~15 of 25 established, with average utilisation at ~47%. Closing this gap is Nigeria's single largest agro-industrial opportunity.

Source: GIZ/MOVE Cashew High Level RoundTable Discussion, July 2025 | African Cashew Alliance 2024

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Key Challenges Holding Nigeria Back

Structural barriers to value chain competitiveness

📉 **Low Processing Rate**	Only 15% of crop processed locally; 85% exported as raw material at low value
📋 **Policy Vacuum**	Nigeria classified as 'no policy / low regulation' — national cashew strategy still pending
🌾 **Yield Gap**	250–300 kg/ha vs 900+ kg/ha in Ghana; limited R&D, few improved varieties
🔍 **Traceability**	No standard grading system; weak NAQS/SON enforcement; aflatoxin and food safety risks
💰 **Finance Access**	Processors and farmers lack access to affordable finance for equipment and expansion
👩 **Women's Access**	Socio-cultural barriers restrict women's land ownership and finance access in farming communities
⚡ **Infrastructure**	Energy gaps, poor rural roads, no cold chain, unreliable power supply
🌍 **Post-Harvest Loss**	Poor storage infrastructure leads to quality degradation and price discounting

Estimated annual value loss: Nigeria exports ~255,000 MT RCN at USD 600–1,000/MT, foregoing ~USD 1.3 billion in kernel export revenue that could be captured through domestic processing.

Source: GIZ/MOVE Cashew High Level RoundTable Discussion, July 2025 | African Cashew Alliance 2024

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Why policy was urgent:

- **Raw cashew exports**: Over 85% of production was exported as raw nuts, limiting domestic value addition.

- **Increase productivity:** Ageing plantations, limited improved planting materials and weak extension services constrained yields.

- **Enhanced processing:** Existing processing capacity was insufficient to transform Nigeria into a major value-added cashew producer.

- **Farmer income:** Weak aggregation and market systems reduced farmers' ability to capture greater value.

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Why Policy Was Urgent Cont.:

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- **Bridge Investment gap:** The sector needed stronger financing and incentives for processing, infrastructure and value addition.

- **Effective coordination**: Multiple institutions and value-chain actors required a coordinated national policy framework.

- **Export diversification:** Cashew offered an opportunity to increase non-oil exports and foreign-exchange earnings.

- **Industrialisation:** An urgent shift was needed from raw commodity exports to domestic processing and industrial value creation.

Policy Framework Development & Stakeholders Consultation:

- **Initiation:** NCAN and FMITI began the policy framework development process in Q3–Q4 2024.

- **Sector-wide diagnosis:** Consultations across 19 cashew-producing states identified key constraints across production, processing, finance, markets and governance.

- **Evidence & drafting:** Stakeholder evidence was consolidated into the Nigeria Cashew Roadmap, covering the full value chain.

- **Stakeholder review:** An initial review workshop in October 2024 brought together participants from 40+ institutions to review and strengthen the emerging framework

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Policy Framework Development & Stakeholders Consultation Cont.

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- **Pre-validation refinement:** Further consultations in May 2026 incorporated inputs from government, industry, processors, exporters, states and development partners.

- **Final validation:** The revised framework was presented for national validation in July 2026, with agreed amendments captured for finalisation.

- **Outcome:** A stakeholder-informed, nationally coordinated policy framework designed to drive productivity, processing, investment, value addition and export growth.

Validation workshop results

The Cashew Roadmap Validation outcome:

- The Roadmap was validated by government and industry on July 15–16, 2026 — establishing it as the Federal Government's preferred approach to cashew sector governance, supply management, and export policy. Ministerial endorsement from the Honourable Minister of State for Industry confirmed FMITI's institutional leadership role.

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Validation workshop results

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The Cashew Roadmap Validation outcome:

Policy consensus reached:

- No premature statutory export ban — unanimous
- EWOD as preferred supply management instrument
- NCPO as the coordinating institution
- NEPC statutory authority confirmed as

Institutional Agreements:

- FMITI & FMAFS confirmed as lead MDA for NCPO oversight
- NEPC to issue Levy Clearance Certificates
- Nigeria Single Window integration confirmed

Architecture and next steps:

- Ten-year targets validated
- Production: 300–350Kt to 1 million MT by 2035
- Domestic processing: <10% to 50% of production
- Grafted variety replanting across all 27 states

The Nigerian Cashew Project Office — institutional architecture

Governance structure:

- National Steering Committee
- Technical Steering Committee / Technical Working Groups
- NCPO National Coordinator supported by technical committee
- FMITI & FMAFS as supervising MDAs — reports to Honourable Minister

Export Window Opening Date (EWOD) — Mechanism:

Season-by-season operation:

Season start:

NCPO Technical Committee convenes — assesses harvest volume, processor declared capacity, farm gate prices, and carry-over stocks.

Pre-EWOD period:

Domestic supply reserved exclusively for registered processors at competitive prices — no Levy Clearance Certificate available for export

EWOD declaration:

National Coordinator declares EWOD — date communicated to value chain participants at point of declaration (not in advance)

Export Window Opening Date (EWOD)— Mechanism Cont:

Post-EWOD:

Exporters present valid Levy Clearance Certificate (LCC) at Nigeria Single Window — confirms Cashew Development Fund levy remittance and supply chain traceability registration

Annual calibration:

Minimum processor absorption threshold rises each season proportional to verified processing capacity growth — no legislation required

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Export Window Opening Date (EWOD) VS Stautory Export Ban— Mechanism Cont:

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EWOD vs Statutory Export Ban:

- Reserves supply for processors proportional to demonstrated capacity — Avoids surplus accumulation that collapses farm gate prices
- Adapts to seasonal harvest variability across 27 states — No fixed dates in law
- Prevents anticipatory stockpiling by foreign buyers — EWOD date not announced in advance
- Protects farm gate prices — Export channel remains as price floor until domestic capacity scales
- No annual National Assembly return — NCPO calibrates seasonally within the framework

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The Decade vision — 2025–2035 targets

1M MT Production target by 2035	50% Domestic processing by 2035	27 States in replanting programme	~150 Processing plants needed at 50%

- **Production pathway — agronomic**

Nigeria's orchards dominated by ungrafted seedling trees yielding a fraction of CRIN Ochaja certified grafted varieties, which yield 3–4x more per hectare. Structured national scion deployment across 27 states over 10 years achieves 1 million MT without expanding land under cultivation.

- **Processing pathway — economic**

NCPO Processor Working Capital Facility at 9% per annum (vs. 25–35% commercial rate) plus priority supply access under EWOD changes the investment economics for processing capacity expansion — making tenfold growth viable for private capital.

The Decade vision — 2025–2035 targets Cont.:

The Côte d'Ivoire benchmark:

12 years of consistent institutional discipline took Côte d'Ivoire from Nigeria's exact starting point to 345,000 MT domestic processing and $440M in kernel export revenue (2024). Singapore's Valency, Olam, and Vietnam's Quang Thien Imex have since built processing plants on Ivorian soil — buyers turned investors by a functioning policy environment.

Partnership and investment opportunities — call to action

Nigeria's invitation to partners:

The Nigerian Cashew Sector Policy Framework 2025–2035 is open for partnership. FMITI, NCAN, and the NCPO welcome bilateral engagement with ACA member country governments, development finance institutions, processors, and technology providers. The institutional architecture is validated. The investment case is confirmed. The conversation starts here.

Thank you!