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A DECADE OF TRANSFORMATION

ACA World Cashew Festival & Expo 2016



**Bissau, Guinea-Bissau**

*September 19-22, 2016*



Opportunities and Challenges of the Cashew  
Industry: Africa and Beyond

Wayne Tilton, September 20, 2016



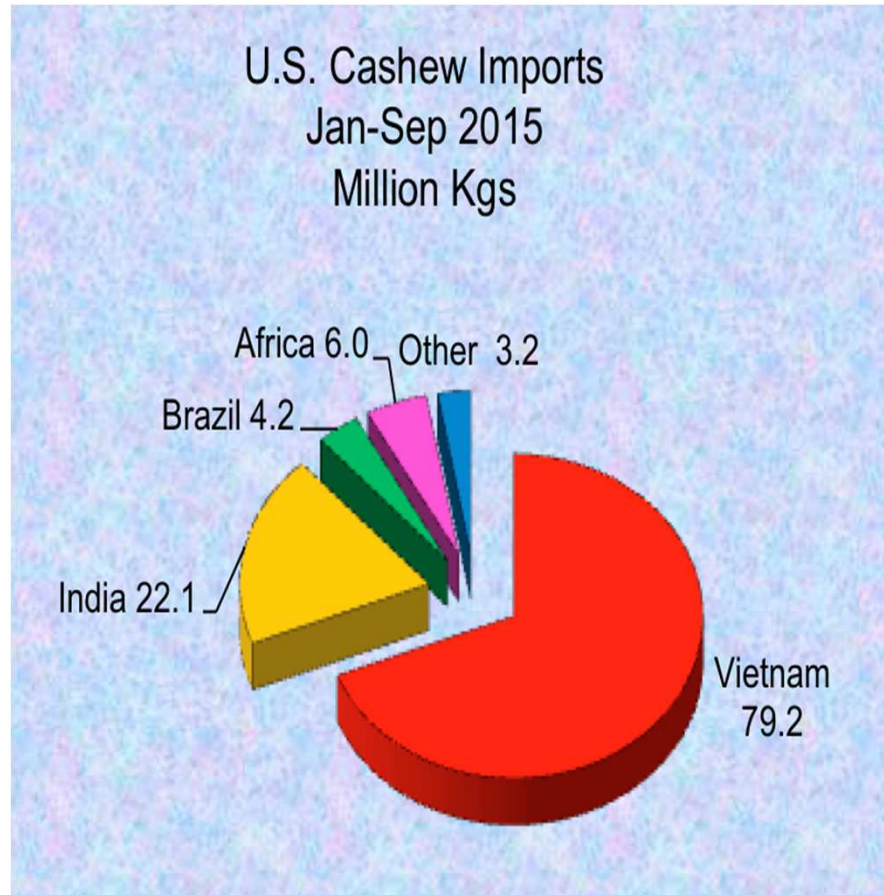
# Trends in Nuts

- Consumer Shift away from Traditional Sources of Protein (Red Meat)
- Growing Demand for healthy snacks
- Rise of Vegetarianism and Veganism
- Demand for Natural products and ingredients
- Greater Acceptance of Nuts High Content of “good fat”
- Interest in the Story behind their Food





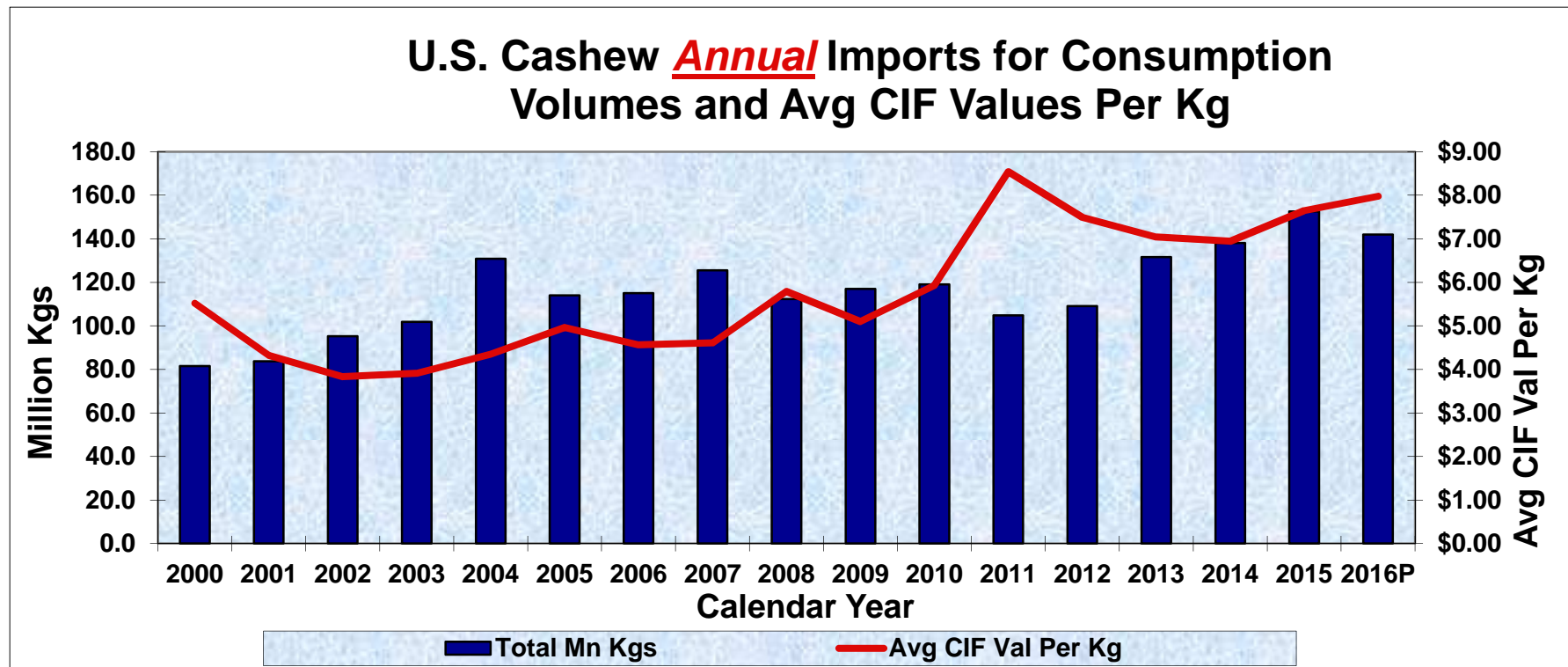
# History of US Cashew Imports by Origin



Origin	Mn Kgs
Vietnam	79.2
India	22.1
Brazil	4.2
Africa	6.0
Other	3.2
Total	114.7



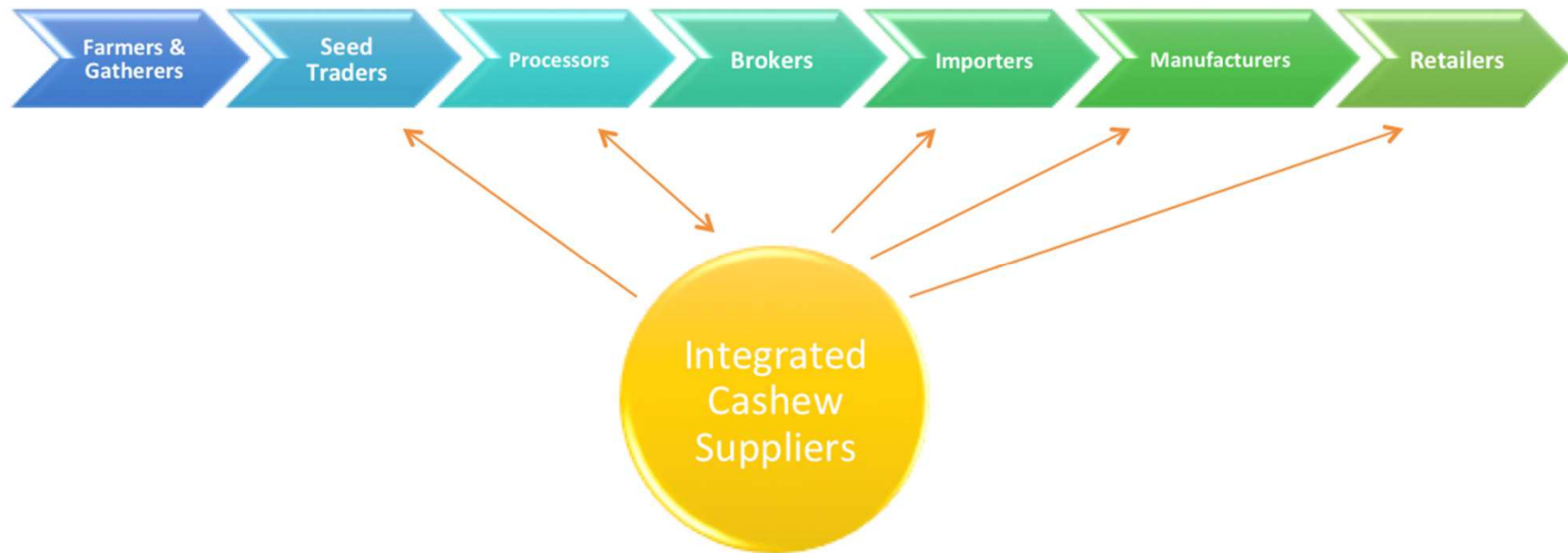
# Consumption





# Opportunities & Challenges

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# Opportunities

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- Large production of raw material
- Growing interest with international buyers
- Increase awareness of food safety





# Challenges

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- Lack of consistent supply of kernels
- Higher processing costs that result in higher non-competitive kernel prices





# Compliance with the US Food Safety Modernization Act

## Major Rules:

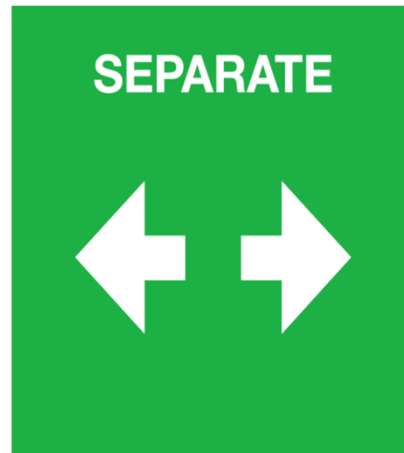
- **Preventive Controls for Human Food** - Requires that food facilities have safety plans that set forth how they will identify and minimize hazards. Original rule proposed January 2013; supplemental rule to add specific language for important provisions proposed September 2014. Final rule issued: Sept. 10, 2015
- **Foreign Supplier Verification** - Importers will be required to verify that food imported into the United States has been produced in a manner that provides the same level of public health protection as that required of U.S. food producers. Original rule proposed July 2013; supplemental rule to provide, among other provisions, more flexibility in determining appropriate verification measures proposed September 2014. Final rule issued: Nov. 13, 2015.
- **Third Party Accreditation** - Establishes a program for the accreditation of third-party auditors to conduct food safety audits and issue certifications of foreign facilities producing food for humans or animals. Proposed July 2013. Final rule issued: Nov. 13, 2015.
- **Sanitary Transportation**: Requires those who transport food to use sanitary practices to ensure the safety of food. Proposed January 2014. Final rule issued: Apr. 5, 2016
- **Intentional Adulteration**: Requires domestic and foreign facilities to address vulnerable processes in their operations to prevent acts intended to cause large-scale public harm. Proposed December 2013. Final rule deadline: May 31, 2016.







# Preventative Controls



- Controls implemented by operation to ensure that hazards identified in the hazard analysis are “significantly minimized or prevented”.

## Types of controls:

- Points in the manufacturing process (e.g. cooking, roasting etc. may be referred to as CCPs)
- Food Allergen Controls
- Sanitation Controls
- Supplier Controls



# Foreign Supplier Verification Program

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- Only Approved Suppliers
- Onsite audits
- Sampling and testing
- Review of relevant food safety records
- Other as appropriate
- Activity and frequency based on nature of hazard, where it is controlled and supplier performance.
- Foreign suppliers food safety history
- Responsiveness in correcting past problems
- Storage and transportation practices.





# Summary



Working together throughout the whole supply chain will produce:

- Better quality and higher yields from farmers
- Processors that will meet FSMA standards
- Buyers will receive quality kernels from Africa