

2024 ANNUAL REPORT

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Message from the Chairperson of CAC

This year has seen remarkable growth, innovation, and collaboration, bringing us closer to achieving our vision of a sustainable and prosper-

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Cambodian Cashew Nuts: A Global Benchmark for Quality

Cambodian cashew nuts are celebrated globally for their large size, superior quality, and high nutrient content.



General Overview: A Snapshot of Cambodia's Flourishing Cashew

By 2024, Cambodia is projected to produce 850,000 tons of raw cashew nuts, with 815,000 tons earmarked for export. This marks a 21% increase, generating an estimated 795,000 tons are expected to be exported to Vietnam.

Despite the existence of a loan, the terms are unfavorable for domestic cashew producers, preventing them from gathering the capital needed to purchase stockpiles for processing. 95% of raw cashew nuts are exported,

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Technical Achievements

CAC has placed significant emphasis on advancing the technical skills and capabilities of stakeholders within Cambodia's cashew industry. In 2024,

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DIRECTOR TESTIMONY



Message from the Chairperson

Dear Partners, Members, and Stakeholders,

As we reflect on 2024, we are proud of the significant progress made in advancing Cambodia’s cashew nut industry. This year has seen remarkable growth, innovation, and collaboration, bringing us closer to achieving our vision of a sustainable and prosperous cashew sector.

With over 850,000 tons of raw cashew nuts produced and substantial strides in domestic processing, CAC continues to act as a bridge between farmers, processors, and global markets. This report highlights our key achievements, challenges, and the path forward.

Thank you your unwavering support.

Warm regards,

SILOT OUN

Chairperson, CAC



Mission and Vision of CAC: Shaping the Future of Cambodia’s Cashew Industry

Mission

To alleviate poverty by empowering cashew farmers and promoting sustainable agricultural practices, in alignment with government policy. CAC aims to strengthen the cashew nut industry’s image both nationally and internationally, ensuring its growth and prosperity.

Vision

To position Cambodia as a global leader in cashew production and marketing, fostering innovation and sustainability to enhance the livelihoods of local communities and contribute to the national economy.

Goal

- Provide technical training to cashew nut farmers and agricultural cooperatives across Cambodia.
- Establish community warehouses in all cashew-producing provinces.
- Launch CAC’s first processing factory for processor training.
- Transform Kampong Thom into Cambodia’s largest cashew industrial zone.



General Overview: A Snapshot of Cambodia's Flourishing Cashew

By 2024, Cambodia is projected to produce 850,000 tons of raw cashew nuts, with 815,000 tons earmarked for export. This marks a 21% increase, generating an estimated 795,000 tons are expected to be exported to Vietnam.

Despite the existence of a loan, the terms are unfavorable for domestic cashew producers, preventing them from gathering the capital needed to purchase stockpiles for processing. 95% of raw cashew nuts are exported, while only 5% are processed domestically. This situation results in a loss of potential value added for farmers, traders, and local communities.

The Cashew Nut Association of Cambodia (CAC) has 19,721 out of 25,000 household families across 45 farming communities covering 370,000 hectares. Among these, 44 members are traders and small to medium-sized enterprises. CAC is an independent entity that is not affiliated with any NGO.



Cambodian Cashew Nuts: A Global Benchmark for Quality

Cambodian cashew nuts are celebrated globally for their large size, superior quality, and high nutrient content. Notably, the M23 variety stands out as the largest cashew nut, offering a creamy texture and sweet flavor. Compared to nuts from countries like Brazil, Vietnam, Kenya, and India, Cambodian cashews have the highest nutrient content, including significant levels of carbohydrates, sodium, and vitamin K. Research also highlights their heart-health benefits, with the presence of oleic acid, an omega-9 fatty acid.



and ensuring the efficient storage and processing of cashew nuts to meet market demands.

To strengthen market linkages, CAC facilitated business



meetings connecting farmers, collectors, and buyers. These interactions resulted in the establishment of trading contracts and fostered long-term partnerships. Cambodia's global presence through participation in



international food fairs in Japan, China, and Australia, showcasing the quality and diversity of Cambodian cashew products.

Through these technical achievements, CAC continues to pave the way for sustainable growth and enhanced global competitiveness in Cambodia's cashew industry.

Technical Achievements: Advancing Skills, Infrastructure, and Market Connectivity

CAC has prioritized technical advancements and capacity-building initiatives to elevate Cambodia's cashew industry.

CAC has placed significant emphasis on advancing the technical skills and capabilities of stakeholders within Cambodia's cashew industry. In 2024, the association delivered 11 workshops and organized field trips, reaching over 1,026 farmers across key provinces such as Kampong Thom, Kratie, and Stung Treng. These initiatives provided participants with practical knowledge on cashew nut processing, quality control, and advanced agricultural practices.

In collaboration with 3CORSECO, CAC conducted hands-on training for 56 individuals, focusing on the production of

semi-finished cashew nuts. The training not only enhanced the participants' skills but also showcased modern machinery and efficient processing techniques, demonstrating the potential for increased local value addition.

Recognizing the growing challenges posed by climate change, CAC launched a pioneering adaptation program supported by the Mitsubishi Corporation. This program directly engaged 167 farmers in Kampong Thom, equipping them with strategies to mitigate climate-related risks and enhance the resilience of their farming practices.

CAC also invested in infrastructure improvements, including the preparation of three community warehouses. These facilities are pivotal in addressing post-harvest challenges

Major Achievements: Building Momentum for Cambodia's Cashew Industry

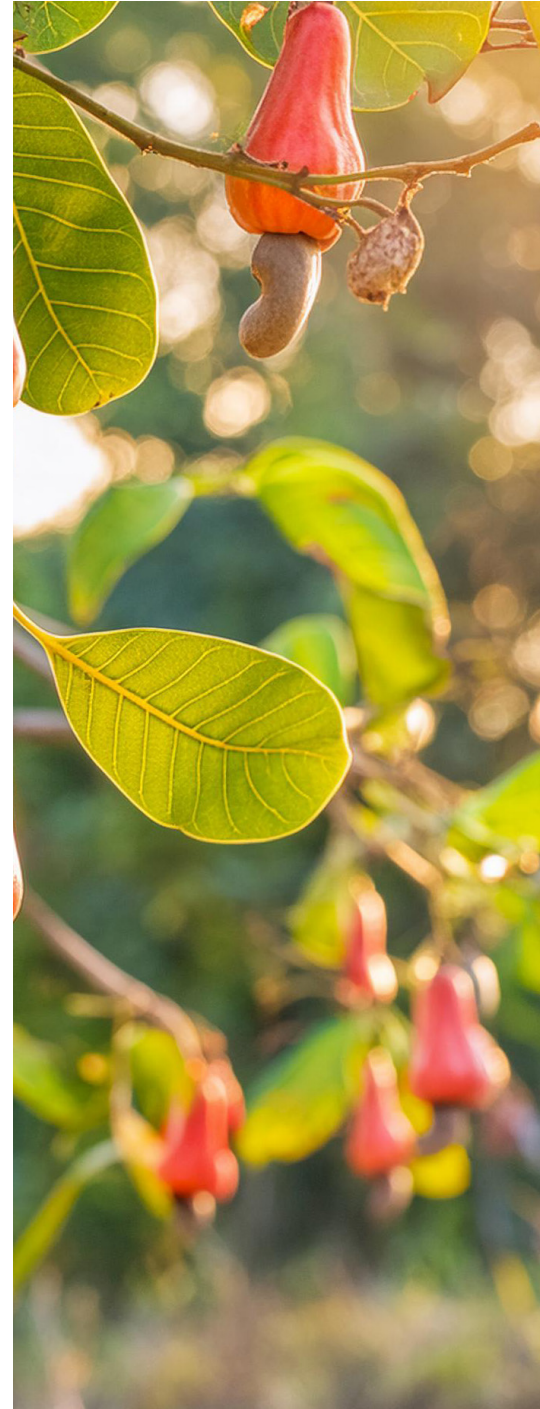
In 2024, CAC demonstrated its unwavering commitment to advancing Cambodia's cashew sector. From climate-resilient farming practices to forging international collaborations, CAC's initiatives have fostered growth and created transformative opportunities for all stakeholders.

Through workshops and study tours, CAC provided farmers with critical strategies to adapt to climate challenges while showcasing best practices in cultivation and management. These efforts enhanced farming techniques and built greater resilience among agricultural communities. To address post-harvest challenges, CAC established community warehouses, enabling improved storage solutions and preserving the quality of raw cashew nuts for export and domestic processing.

CAC also prioritized data collection to support feasibility

studies for factory investments, paving the way for increased domestic cashew processing. By connecting buyers with producers, CAC ensured competitive pricing and fostered stronger market linkages. Strategic partnerships, such as the signing of an MoU with the Chinese Customs Association, expanded international collaborations and bolstered Cambodia's presence in global cashew markets.

These achievements underscore CAC's role as a key driver of growth and innovation, advancing the cashew sector and creating sustainable opportunities for all stakeholders.

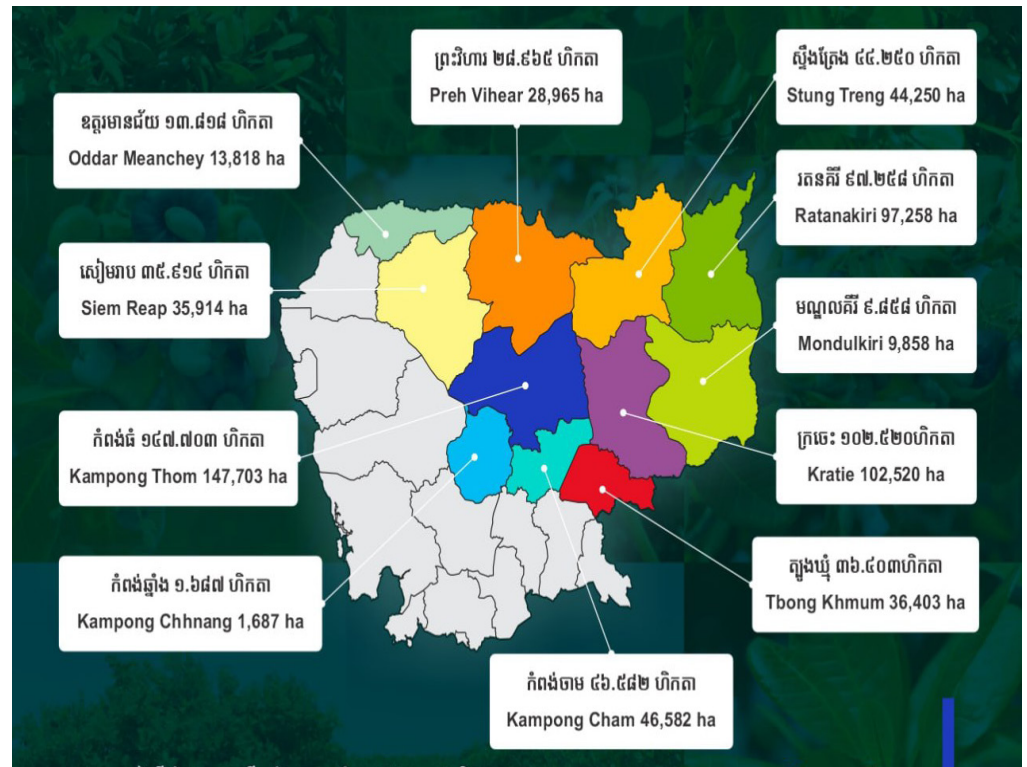


Partnerships and Collaborations





Cashew Farmland Data: An Overview of Cambodia's Cultivation Landscape



Cambodia's productive cashew farmland covers over 580,000 hectares, making it a significant contributor to the agricultural economy. Among the provinces, Kampong Thom leads with 147,703 hectares, followed by Kratie with 102,520 hectares, and Ratanakiri with 97,258 hectares. Other provinces, such as Stung Treng and Preah Vihear, collectively add 188,386 hectares to the total cultivation area.

In addition to these established regions, newly planted areas are increasing Cambodia's total cashew farmland, which CAC estimates at around 700,000 hectares. These expanding plantations reflect the growing importance of cashew production as a cornerstone of economic and community development in the country.

Partnerships and Collaborations



Marketing Findings: Insights into Market Trends and Partnerships

In 2024, CAC enhanced Cambodia's cashew market by linking local producers with global buyers, improving trade and increasing product visibility.

Several companies partnered with CAC to purchase raw cashew nuts (RCN) in 2024, including Giant Cashew Enterprise, CSNC Agriculture Co., Ltd., Angkor Green Fruit and Vegetables Co., Ltd., HCST, and Chey Sambo. While buyers from China and India focus on high-quality dried RCN for long-term supply, Vietnamese buyers prefer low-cost fresh RCN for border processing and recycling before resale to refineries.

CAC's international presence included participation in prominent events such as the Food Fair in Japan, attended by Handcrafted Cashew Nut Stung Treng, and the 21st CA-EXPO RCEP Agricultural and Food Products Trade and In-



dustry Cooperation Forum. Additionally, CAC attended the 2nd Hainan International Tropical Food Supply Chain Expo and undertook a business visit to Australia to explore growth opportunities in the cashew sector.

Workshops on post-harvest

management provided training on drying, grading, and humidity control to meet international quality standards, further enhancing Cambodia's reputation in global markets.



Acknowledgments

We sincerely thank all our members, partners, and stakeholders for their unwavering support throughout 2024. Your collaboration has been crucial in achieving significant milestones, driving growth, and enhancing the quality and market reach of Cambodia's cashew industry. Together, we are forging a resilient and thriving cashew sector that not only uplifts the local economy but also sets a benchmark for excellence on the global stage. We look forward to continuing this fruitful partnership as we strive for a sustainable and prosperous future.



Farm Techniques: Enhancing Cashew Cultivation Practices

CAC has made significant advancements in farm techniques to ensure high-quality cashew production and improved agricultural practices. In 2024, farmers received comprehensive training on integrated pest management, soil fertility improvement, water conservation, pruning, grafting, and disease control. These efforts aim to maximize yields and minimize environmental impact, ensuring the long-term sustainability of cashew farming.

Additionally, CAC introduced eco-friendly practices such as organic composting and the reduction of chemical pesticide use. These practices align with the increasing global demand for sustainable and environmentally responsible products. Workshops and field demonstrations emphasized the importance of maintaining soil health and adopting modern farming methods to enhance productivity. By implementing these techniques, CAC has empowered farmers to adapt to challenges while fostering a resilient and productive agricultural ecosystem that benefits local communities and stakeholders alike.

Processing Knowledge: Empowering Farmers in Post-Harvest Management

CAC has provided farmers with critical knowledge on essential processing techniques, which include:



Harvesting techniques: Training on optimal harvesting timings and methods to ensure the nuts are collected at peak quality.



Nut grading: Guidance on sorting nuts by size and quality to meet market standards.



Drying platforms: Techniques for using drying platforms to reduce moisture levels and improve storage longevity.



Internal snippets: Knowledge on inspecting and managing nut quality during processing.



Humidity check/moisture control: Training on monitoring and controlling moisture levels to prevent spoilage.



Repository management: Proper storage practices to maintain nut quality and facilitate efficient distribution.

Challenges and Solution

Tackling challenges is essential for the growth of Cambodia's cashew industry. CAC is committed to addressing infrastructure gaps and financial constraints to build a

Cambodia's cashew industry is navigating several significant challenges. A critical issue is the lack of community warehouses, which restricts the ability to meet the high demands of foreign companies, especially during peak seasons like August and September. The cost of establishing a warehouse capable of storing 5,000 tons of dried seeds is prohibitively high, at an estimated \$1 million. Consequently, farmers are often forced to sell fresh nuts directly, losing substantial profits to brokers.

Furthermore, while CAC has established a robust member structure in its ten target provinces, financial constraints have delayed the establishment of formal provincial offices. As a non-profit organization, CAC faces difficulties in securing consistent funding for branch offices, limiting its reach and operational capacity. Another pressing challenge is the reluctance of members to contribute financially to the association. This hesitancy



CAHSEW NUT SUN DRYING



After harvesting, cashew nut will sun drying for 3 to 7 days for 8 to 9% moisture

stems from limited public awareness of CAC's initiatives and the tangible benefits it offers. Addressing these funding challenges is crucial to sustaining and expanding the association's activities.

To overcome these obstacles, CAC is focusing on developing community repositories, improving infrastructure, and intensifying efforts to collect membership fees. Additionally, the association aims to raise public awareness of its impact and value, encouraging greater engagement and support from its members. By addressing these challenges, CAC aspires to foster a more resilient and sustainable cashew industry that benefits farmers, stakeholders, and the Cambodian economy.

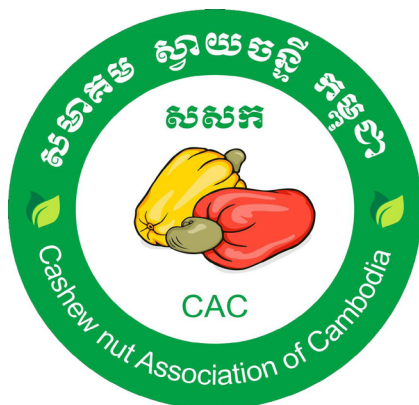
Way Forward: Advancing Cambodia's Cashew Sector with Innovation and Resilience

CAC is committed to driving innovation and sustainability in Cambodia's cashew sector. By strengthening infrastructure, diversifying markets, and addressing environmental challenges, the association aims to build a resilient and thriving industry that benefits all stakeholders.

CAC plans to expand member services with workshops and study tours focused on farming, drying, and grading. Infrastructure improvements, such as community warehouses and provincial branches, will enhance post-harvest management and storage. The association also prioritizes diversifying export markets and strengthening international partnerships to open new opportunities. Additionally, climate-resistant cashew varieties will be introduced to tackle environmental challenges and ensure the sector's resilience. These efforts aim to build a sustainable and competitive cashew industry for Cambodia. Diversifying export markets remains a top priority,



and CAC will strengthen international partnerships to open new avenues for Cambodian cashews. Additionally, the introduction of climate-resistant cashew varieties will help address environmental challenges, ensuring the sector's resilience against changing climate conditions. These initiatives are geared towards fostering a robust and sustainable cashew industry that benefits farmers, stakeholders, and the Cambodian economy at large.



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