

# Exporting Cashew Nuts from Cambodia to Europe





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# The EU market for Cashews Nut

Accounting for more than a third of total global imports, the European Union is the world’s largest market for cashew nuts. As import volumes gradually increase, the region offers great opportunities for exporters based in developing countries aiming to expand their business.

The European market for cashew nuts is predicted to grow at a steady rate of 5% to 6% per year in the medium to long term.<sup>1</sup> Changes in European consumers’ consumption patterns, such as a rise in demand for healthy snacking options and a desire to shift to vegetable proteins are anticipated to drive this growth.

In 2020, 96% of all Cambodian cashew nuts exports were directed to Vietnam – the world’s largest exporter of cashew nuts - which often processes and re-exports them.<sup>2</sup> Cambodian producers and exporters have much to gain by cutting out intermediaries and directly approaching end markets in the European Union.

Cambodia is very much aware of its potential in the cashew industry. As exports quickly increase, the National Policy on Cashew Nuts, which aims to boost production and exports – should be approved by the government in 2022.

The objective of this guide is to raise awareness regarding opportunities in the European market for Cambodian cashew nuts, as well as guide exporters on the basic steps they need to take to get their products on the market.

## I Product definition

The cashew nut is the fruit of the cashew tree. Its edible kernel acquires all its gustatory qualities after undergoing a series of transformations. It can then be consumed raw or cooked, much like peanuts. In Europe, it is mainly sold roasted and salted as an appetizer.

### 1 Presentation of the product

After removing the nuts from the shells within the cashew apple, processing typically includes the following five steps:

- Preparing the nuts for shelling (drying, sizing, cleaning, steam cooking or roasting) name of the variety and/or commercial type (optional) {according to the nature of the produce}
- Shelling (with automatic, semi-automatic, or manually operated machines) type or style {according to the definitions of the standard}
- Peeling (drying shelled nuts, then peeling automatically or manually)
- Grading (colour sorting, sizing, cleaning)

Packing (weighing, vacuum sealing)<sup>3</sup>

Cashew nuts are increasingly used as an ingredient in different types of foods, such as breakfast cereals, cookies, butter, sauces, and other condiments.

Cashew nuts are traded under two different Harmonised System (HS) codes:

- **08013100** for in-shell cashew nuts
- **08013200** for shelled cashew nuts (kernels)

As European imports of in-shell cashew nuts are almost non-existent, this study focuses on shelled cashew nuts (kernels).

### 2 Cambodian product offer

Cashew nuts grow easily in Cambodia, where the climate is tropical year-round.

From 600,000 tonnes in 2019 to 1,100,000 tonnes in 2021, Cambodian exports of raw cashew nuts are growing at a steady rate.<sup>4</sup>

Table 1: Cambodia cashew outlook

Raw cashew nuts exports for the last three years	Price per tonne - in USD
<b>2019:</b> 544,000 tonnes	<b>2019:</b> 1740 - 1810
<b>2020:</b> 862,000 tonnes	<b>2020:</b> 1360 - 1740
<b>2021:</b> 998,000 tonnes	<b>2021:</b> 1180 - 1450

Source: Cashew Nuts Association of Cambodia





## Competitive advantages

Cambodia's production is expected increase its production in the coming years due to several factors and competitive advantages:

- The high yielding varieties grown in the country makes Cambodia one of the most productive cashew growers in the world.
- Cambodian cashews offer great quality, both in terms of nut size and yield.
- Smallholder cashew farms in Cambodia are larger than those in competing countries.
- Bordering Vietnam, it is perfectly located for exports.
- The harvest seasons are different from those of major cashew producing countries, which offers Cambodia the opportunity to reduce European fluctuations in imports.

## Main varieties<sup>5</sup>

The main varieties grown in Cambodia are M23, H09, M10, P2, and M1.

With its large size and white colour, M23 is the preferred variety for exporting to Europe.

## Sector associations and cooperatives

Cambodian cashew nut associations and cooperatives play an important role in the cashew industry. Dozens of cooperatives are spread throughout the country, with 30 in Kampong Speu and Preah Vihear provinces alone.

Some of these cooperatives are very much supported by various entities. Support come in many forms, from financial/business trainings to warehouse construction and organic transition accompaniment.

The Cashew Nut Association of Cambodia is the most important in the country. In operation since 2009, it is "committed to working with farmers by supporting them with technical assistance and connecting them to exporters".<sup>6</sup> It also supports the development of local cashew nut processors and aims to create local jobs while reducing the need for migrant workers.



## II Introduction to the EU Market



The EU internal market is one of Europe's major achievements and its greatest asset in times of increased globalisation.

By allowing people, goods, services, and capital to move more freely, it opens new opportunities for European citizens, businesses, and consumers. It also opens the door for private businesses outside of Europe to take advantage of this huge consumer market.

As one of the world's largest economies with a

GDP of \$17.1 trillion in 2020, the European Union accounts for more than 15% of the world's trade in goods. The total value of the EU's trade with non-EU countries reached €4.067 trillion in 2020, making the EU the second-largest trading power after China and ahead of the United States.

About 447 million people live in the EU in 2022. According to the European Parliament, more than 30 million of them have jobs that depend on foreign trade.<sup>7</sup>



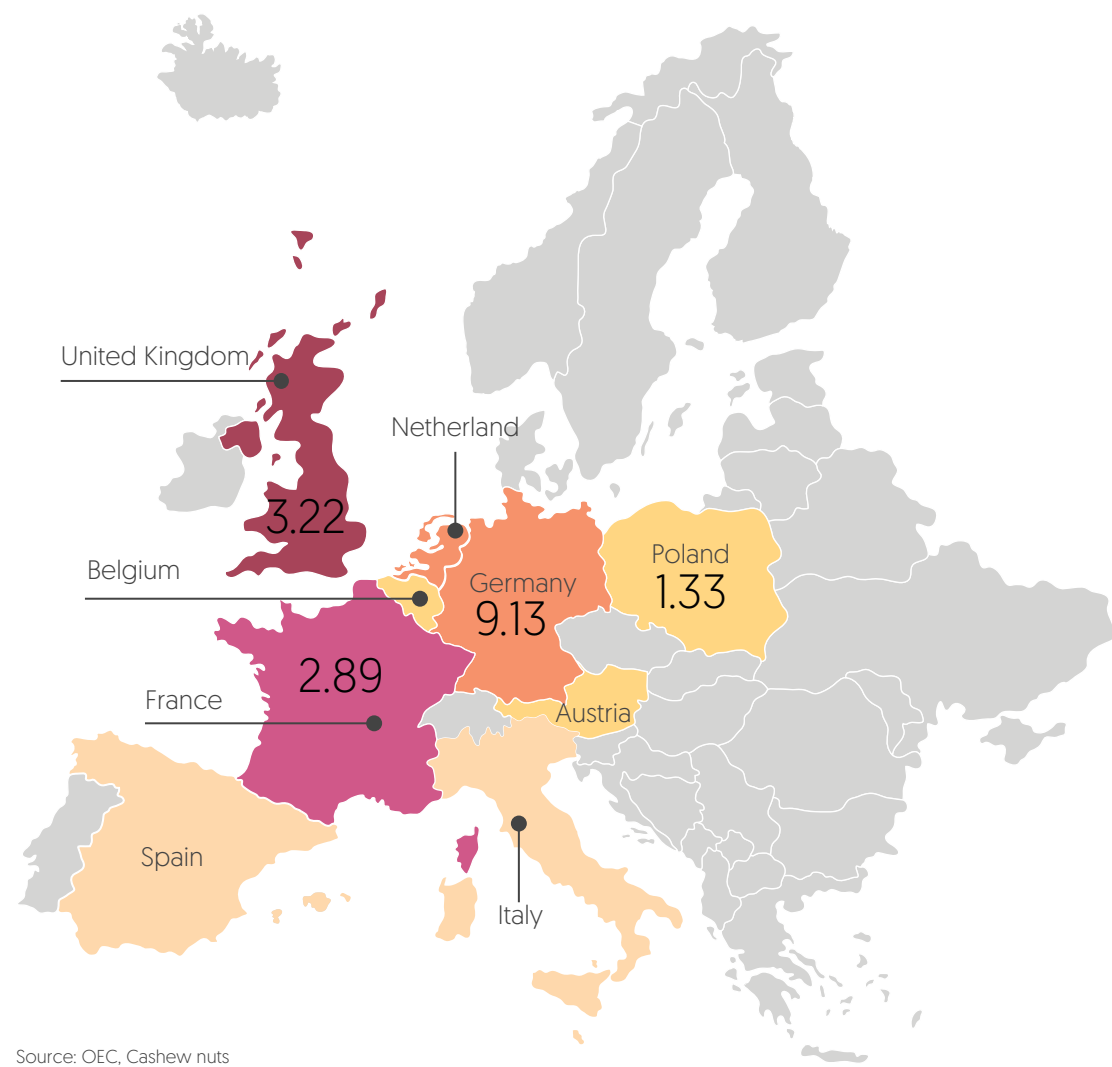
# 1 The European cashew nuts market

Accounting for more than a third of total global imports, Europe is one of the largest importing regions of cashew kernels in the world. Volumes of imports rose by an average of 6% over the 2016-2020 period and are expected to continue to grow at a rate of 3% to 5% in the next few years.<sup>8</sup>

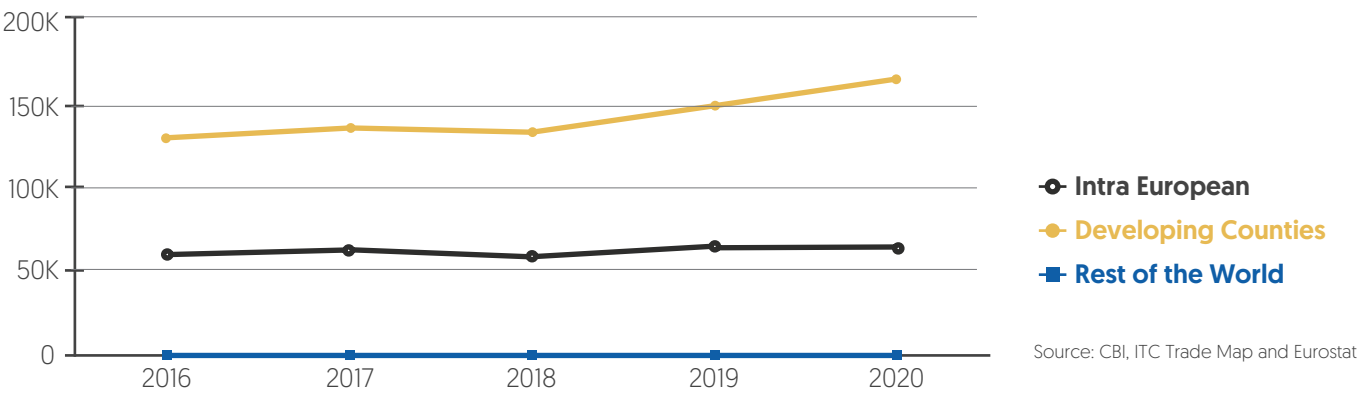
Although demand for cashew nuts is stable, imports experience regular fluctuations due to variations in supply and therefore, prices. Prices strongly influence the European demand for cashew nuts, especially since this product is easily substitutable with other, cheaper nuts.

In 2021 – although COVID-19 was still affecting the world – cashew nut retail prices continued to decrease significantly, thus boosting at-home consumption. Consumption in the foodservice segment and in the industry, on the other hand, experienced a sharp decrease due to lockdowns and other restrictions. However, healthy food trends, attractive prices, and lockdowns have generally boosted the total consumption of cashew nuts in Europe.

**Figure 1: Main European importers cashew nut kernels in 2020 in value, in percent of total worldwide imports**



**Figure 2: European imports of cashew nuts in tonnes**

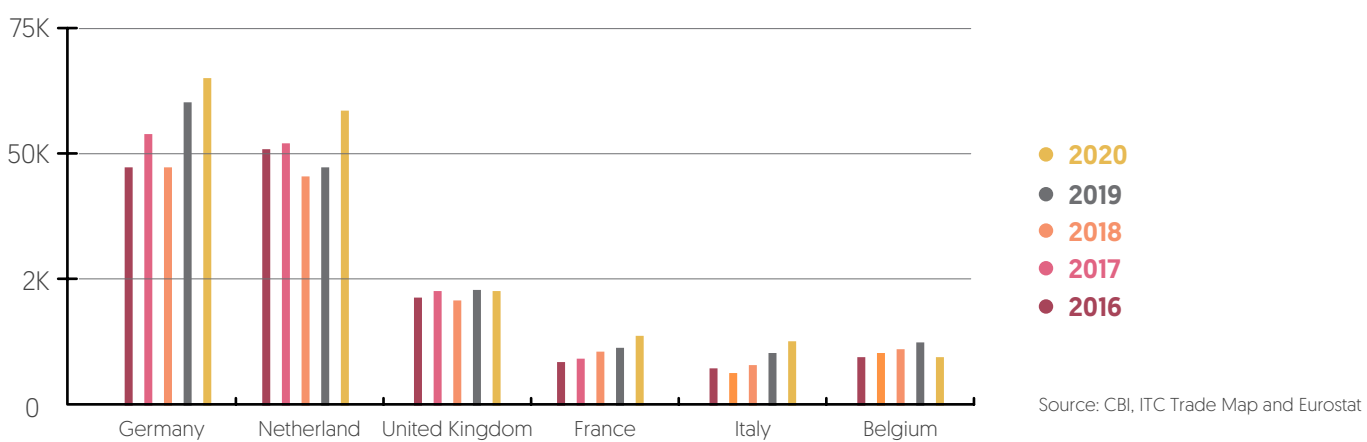


Although cashew nuts are exported to Europe year-round, the first three months of the year usually see the lowest import numbers. As the end of the year approaches, quantities tend to increase, with a peak between September and November.

Cashew nuts exporters should be aware of this and stock up in order to be ready for the peak season.

# 2 Which countries offer the best opportunities

**Figure 3: Main European importers of cashew nuts, in tonnes<sup>9</sup>**



## Germany

With 65,000 tonnes and an import value of €430 million in 2020, Germany is Europe’s top cashew nuts importer.

This is partly due to its strong re-exports to other European countries, which account for roughly 30% of its imports.

In 2020, Germany imported 63% of its cashew nuts from just two countries: Vietnam (34,000 tonnes) and India (seven tonnes). This share is

actually much higher as Vietnamese and Indian cashew nuts often transit through other countries located in Europe, such as the Netherlands and Belgium.

This concentration in only two countries is explained by the lack of processing capabilities in other cashew-growing regions. The remaining imports are shared by a few suppliers: Burkina Faso, Nigeria, Kenya, Ghana, Ivory Coast, Benin, Mozambique, and Indonesia.

Within the next 10 years and with the support of governmental and international funds, African countries are expected to significantly increase their cashew nut production and as a result, their exports to European countries.

Producers that target the German market must be aware of the high standards required by German buyers, including food safety certifications such as the ISO 22000.

Examples of German cashew importers are Märsch Importhandels-GmbH, August Töpfer, Nutwork, and Intersnack.

Leading retail brands in the conventional segment (also importers and packers) include Farmers Snack, Kluth and Seeberger, while Rapunzel and Alnatura focus on the organic segment.

Private labels under brands of retailers play a big role in the cashew nuts sector. Leading private labels include Gut & Günstig, REWE Bio, Trader Joe's (by Aldi Nord), Farmer (by Aldi Süd), K-Classic (by Kaufland), Alesto (by Lidl), and EDEKA.

## Tips and useful readings:

- German cashew nuts traders are listed here - Waren-Verein / German company directory. <https://www.waren-verein.de/en/members/dried-fruit-and-edible-nuts/>
- As the largest market for organic goods, shifting to organic production would give you a strong advantage.

## The Netherlands

The Netherlands accounts for a quarter of all European imports of cashew nuts, mainly because it acts as a trade hub within the area, re-exporting approximately 70% of its imports to other European countries.

The Dutch market strongly depends on Vietnam [79%] and India [8%] for its imports.

Although relatively small, quantities imported from African nations are increasing, with Côte d'Ivoire, Ghana, and Burkina Faso as its main African suppliers.

Examples of Dutch cashew nut importers are Nutland, Catz, Global Trading and Agency, Delinuts, and Rhumveld Winter & Konijn B.V.

While unbranded nut sales are significant, private labels such as Jumbo and Albert Heijn dominate the Dutch market.

## The United Kingdom

In 2020, The UK imported 22,000 tonnes of cashew nuts, making it the third-largest importing country in Europe.

In the last few years, cashew nut imports have not seen significant fluctuations and have remained relatively stable. In 2020, the average British citizen consumed .9kg of cashew nuts.

With Vietnam supplying 70% of its cashew nuts, the market is very much concentrated. The UK also imports a few thousand tonnes per year from other European countries, such as the

Netherlands, Belgium and Germany. Côte d'Ivoire, Benin, and Burkina Faso are countries to watch as their market share is gradually increasing.

The UK market is the largest in Europe for Fair-Trade-certified products.

Examples of UK importers are Lane & Ballard, Barrow, Community Foods, Premier Fruit and Nut, and Freeworld Trading.

## Tips:

- The UK Nut Association lists many UK importers, as well as important buyers from the Netherlands, Germany, and France. As the largest market for organic goods, shifting to organic production would give you a strong advantage.
- The United Kingdom is probably the most innovative market in consumption of cashew nuts, which are found in fruit-and-nut bars and nut milk, for example.

## France

Between 2016 and 2020, France experienced a very strong growth of its cashew nut imports at an average rate of 10% per year over this short period, reaching 14,500 thousand tonnes and €105 million in 2020.

France is mainly supplied by Vietnam (66% market share), India (13%), and the Netherlands (8%). Note that imports from Vietnam are increasing while those of India are decreasing. Madagascar, Ghana, and Burkina Faso are the main African suppliers of France.

Cashew nuts are popular as a snack, but are also being used in nut drinks, chocolate, and other innovative products. Organic sales are doing well, mainly supported by private labels and independent brands such as Ethiquable, Jardin Bio, and Naturalia.

## Tips

- Contact the French association for information in the fruit and vegetable sector to learn more about the cashew nut market.
- Accessing the French market will be a lot easier if your staff speak French.



## Italy

Italy is Europe's fifth-largest importing country, with imports reaching 13,100 tonnes and €64 million in 2020. Italian imports rose by 14% in volume and 6% in value in 2020.

Vietnam provides much of the Italian imports with a 59% share, followed by Brazil (14%). Côte

d'Ivoire is quickly increasing its exports to Italy with a staggering 225% growth between 2019 and 2020. Other interesting African countries to follow are Burkina Faso, Ghana, and Guinea-Bissau. Over the past few years, imports prices have been lower in Italy than in other markets.

## Spain

Spain is a stable and important cashew nuts importer. Imports have seen a quick rise between 2016 and 2020 with an annual increase of 14% in value and 17% in volume.

Half of the cashew nuts imported by Spain are

from Vietnam, followed by India (32%) and Germany (7%).

Ghana, Benin, Nigeria, Tanzania, and Guinea-Bissau are emerging suppliers to the Spanish market.

## Belgium

Although Belgium is a large net importer (sixth largest in Europe) and consume most of its imported cashews, it also exports to other European countries such as Germany, acting as an intermediary between sourcing and destination countries.

In 2021, Belgium imported 13,000 tonnes<sup>10</sup> of cashew nuts, mainly from Vietnam (\$34,912.31, 4,321,500 kg), Netherlands (\$15,061.35, 1,775,670 kg), and India (\$14,739.60, 1,786,620 kg).<sup>11</sup>

## Tips and useful readings:

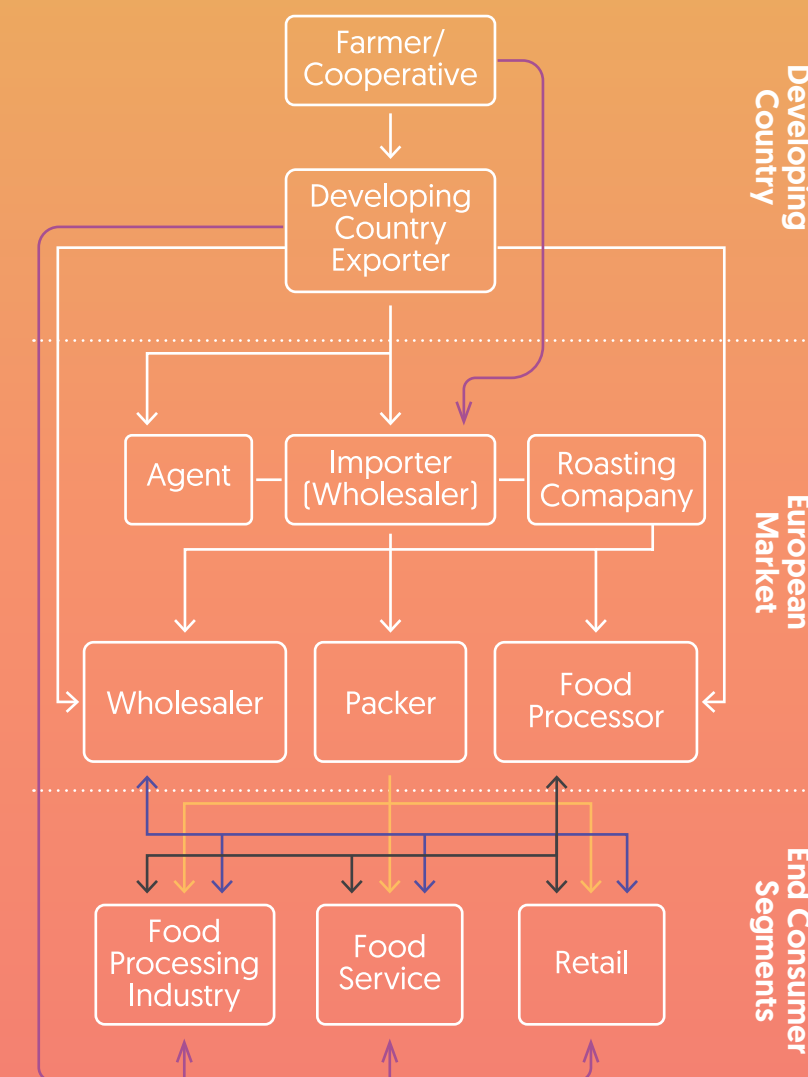
- Check the CBI Statistics & Outlook for Processed Fruit and Vegetables for more information on trends.
- Use tools such as ITC TradeMap or Access2Markets to learn more about trade statistics.

## 3 Distribution channels: how to get your cashews on the European market?

Specialised importers are the favoured channel for market entry. Other alternatives exist, such as food processors, food services companies, and agents. Roasting and packaging companies – such as Intersnack (Germany/International), Ireco (Luxembourg), Max Kiene (Germany) and Trigon (UK) - are important players in the cashew nut industry. Some of them specialise in selling roasted, salted, and spiced cashew nuts to packers in bulk.



### European market channels for cashew nuts



Source: Autentika Global



## Importers/wholesalers



Importers often serve as wholesalers and trade their cashew nuts to roasting companies, who process and pack them for the final consumers.

Importers are interesting partners to work with. Working with small and large volumes, they are a good match for SMEs and should be your favoured contact within Europe.

They usually have a better customer base than producers in developing countries and have therefore a good knowledge of the European market.

Moreover, they may have access to market segments and national markets that you as an exporter would have difficulties reaching.

One way to increase your competitiveness would be to offer - in addition to cashew nuts - other types of edible nuts and dried fruits, as those products are often also imported by cashew nut importers.

Importers must continually adapt to end consumers' changes in habits and needs and are increasingly put under pressure by retailers, who are at the forefront of these changes in demand. This pressure coming from consumers is converted into added value, such as "organic", "natural", "fair-trade" and "sustainable" products. This results in a crucial need for transparency in the supply chain process and encourages most importers to build long-lasting relationships with their trusted suppliers.

## Importers/wholesalers

Two different types of activities are usually performed by brokers and agents. They work as independent companies and act as the intermediary between buyers and sellers, negotiating on behalf of their clients, while earning commissions of around 2% to 4%.

Agents are also well-positioned when it comes to supplying the private labels of the European retail network. For most exporters in supplying countries, it is rather difficult to engage with

different tendering procedures. In cooperation with agents and brokers, you could also participate in these tendering procedures implemented by the retail chains.

Examples of cashew nut agents in Europe include MW Nuts [Germany], Global Trading [Netherlands], Hpm Warenhandelsagentur [Germany], Nutfully [Belgium], and QFN [Netherlands].

## Retail channel

Retailers rarely buy directly from exporters based in developing countries and are mainly supplied by wholesalers and, to a lesser extent, agents.

Recently, the retail sector has become increasingly polarised, seeing a shift towards either the discount or the high-level segment. Consolidation, market saturation, fierce competition and low prices are key characteristics of the European retail food market.

The leading retail companies in Europe are Schwartz Gruppe (Lidl and Kaufland brands), Carrefour, Tesco, Aldi, Edeka, Leclerc, Metro Group, Rewe Group, Auchan, Intermarché, and Ahold (Delhaize, Albert Heijn and several other brands).

In 2020, online sales increased significantly for all retailers.

## Foodservice channel

Most of the foodservice channel - which encompasses hotels, restaurants, and catering companies - is supplied by importers/wholesalers.

Specific packaging of 1kg to 5kg packages are often required by this segment. Business types that enjoy the fastest growth include those in "new" and healthy fast food segment, pop up restaurants, street food vendors, and restaurants

serving international cuisine.

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In 2020, online sales increased significantly for all retailers.

## Tips

- Check the members list of the European Trade Federation for Dried Fruit and Edible Nuts [FRUCOM] to find buyers.
- Consider teaming up with other Cambodian producers to become more competitive.



What is the most interesting channel for you?

As supplying the retail segment directly is very demanding and would oblige producers to make significant investments in logistics and quality, it seems that exporting through specialised importers represents the most interesting channel for suppliers based in developing countries wishing to enter the European market.

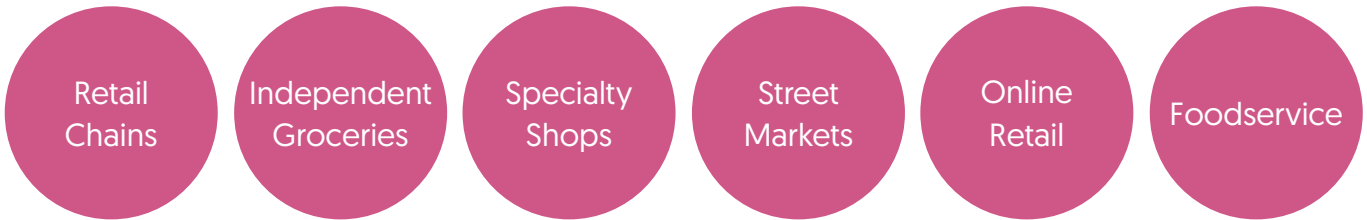
Note that the cost of labour in Europe is expensive and constantly rising. As a result, importers are increasingly looking for cheaper roasting operations, in Eastern European or developing countries, for example.

4 Segmentation of the end market

Although 90% of imported cashew nuts are consumed as a snack in Europe, they are also increasingly being used in the food processing industry as ingredients.

End market segments for cashew nuts in Europe

Snack Segment (90%)



Ingredient Segment (10%)



Snack segment

In the snack segment, potato chips are still the favoured salty snack in Europe. However, nuts are seeing an important growth as they are perceived as better, healthier products.

Nuts as a snack have seen an increase consumption of almost 80% between 2009 and 2018.

There are two main noticeable trends within the snack segment. The first is the diversification of flavours to meet a variety of tastes preferences. The second is the rapid development of a healthier segment preferring unroasted and unsalted nuts.

Ingredient segment

The food processing sector accounts for around 10% of the European cashew nut market and this share is expected to grow substantially in the coming years.

Commonly, processed cashew nuts are present in:

- The confectionary industry, which combines cashew nuts with chocolate.
- The bakery industry, for which pieces of cashew nuts are necessary for the making of cakes, pastries, and cookies.
- Cashew nut spreads, which are marketed as healthier than peanut butter and sometimes mixed with other ingredients to meet a large range of tastes.
- The breakfast industry, as cashew nuts are used in muesli, cereal, and granola products.
- Fruit and nuts bars, as an alternative to chocolate and sugary snacks. It is used as an alternative source of protein.
- Ready-to-eat meals and sauces.
- Recently, cashew nuts have become a trending ingredient for vegan alternatives to dairy products (e.g. cashew cheese)

Tips

- Contact the French association for information in the fruit and vegetable sector to learn more about the cashew nut market.
- Accessing the French market will be a lot easier if your staff speak French.





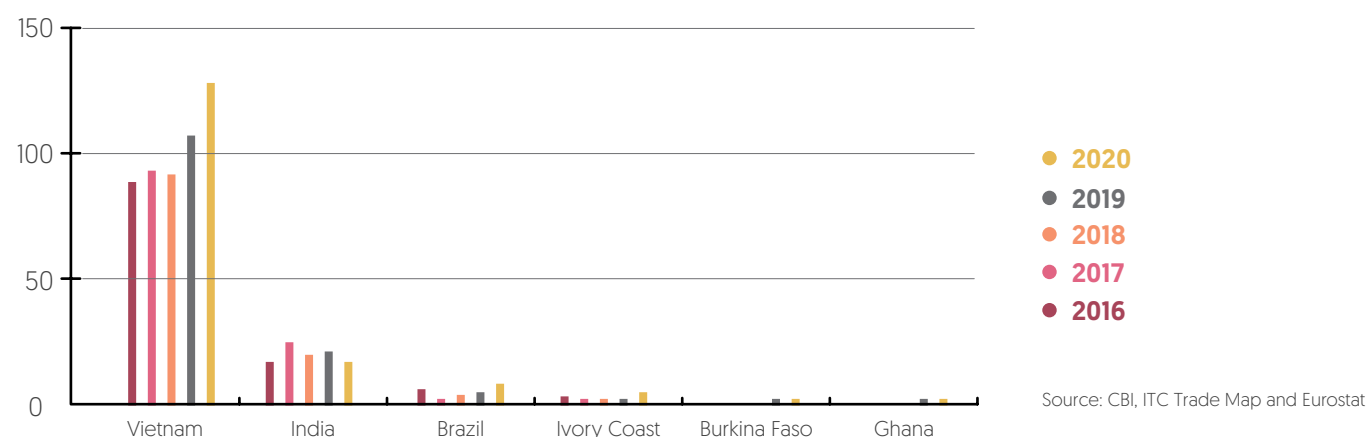
## 5 Who are the main suppliers of cashew nuts to the EU? Who are you competing with?

Although the cashew tree is native to northeast Brazil, it is now present in many parts of the world.

The cashew nuts market in Europe is very much concentrated around Vietnam and India, which represents 85% of the market and who are your

main competitors. With only 4%, Brazil is the third largest supplier. Although still small players, African countries such as Côte d'Ivoire and Burkina Faso are quickly gaining market shares, partly thanks to governmental/international support for an increase in processing capacity.

**Figure 4: Leading suppliers of cashew nuts kernels to Europe, in tonnes**



### Vietnam, world's leading exporter

Thanks to its multiple shelling facilities, Vietnam is incontestably the global leading exporter of cashews. It imports in-shell cashew nuts mainly from Côte d'Ivoire, Tanzania, Ghana, Nigeria, and Cambodia.

In 2020, exports of cashew nuts kernels from Vietnam reached 408,000 tonnes. Its largest destination market is the US, followed by the Netherlands and China. Approximately 30% of Vietnamese exports of cashew nuts kernels are directed to Europe.

The Vietnamese cashew industry is very much supported by its government and several industry organisations. More than supporting cashew nuts production on its soil, the Vietnamese Ministry of Agriculture and Rural Development has strong ties with Cambodia. Both countries are cooperating to develop reliable sourcing processes.

Export activities are supported by the Vietnam Trade Promotion Agency, while the Vietnam Cashew Association focuses on new technologies and promotional activities.

### Vietnamese companies

Around 150 processing companies and 400 cashew nut exporting companies are present in Vietnam.

With roughly 10% of the export share, Olam International is Vietnam's top exporter. However, Olam cannot be considered Vietnamese as it is a multinational headquartered in Singapore with processing capabilities in multiple countries.

Thus, Long Sin – with its ten processing facilities

throughout the country – is Vietnam's true top exporter.

Examples of other large exporting companies are Thao Nguyen, Minh Huy, Hoang Son 1, Cao Pat, Phu Thuy, Rals Vietnam], Da Kao, Lafooco, Tanimex, Tan Hoa, Haprosimex, Hapro, Phuc An, My An Co, Tan Lon Group, and Dan On Foods.

Big processors are currently gaining market share at the expense of SMEs, which are gradually disappearing from the market.

### India, the world's largest producer and consumer

India is currently the largest producers of kernels. Its population consumes roughly 30% of its total production.

As manual processing is still very frequent, Indian productivity is much smaller than that of Vietnam.

The Indian government provides strong support to its cashew nuts industry, whether it is production-wise or export-focused.

The UAE, the Netherlands, and Japan are the main export markets for Indian cashew kernels.

### Indian companies

Several hundred cashew nut companies make India home and more than 190 export to foreign markets.

As in Vietnam, Olam International plays a big role in the Indian cashew nut industry.

Examples of other large exporters include Bismi Cashew Company, Fernandes Brothers, Bola Surendra Kamath & Sons, and Paranjape Agro Products.

While pedal machines are still largely used in India, a shift to automatic processing facilities is clearly visible.

The Indian cashew nut industry can be divided in two. Broken kernels are typically consumed within the country, whereas whole kernels are largely directed to foreign markets.



## Brazil

Brazil accounts for 4% of worldwide cashew kernel production and 4% of global exports.

It imports large quantities of in-shell cashew nuts to process them. Its only sourcing market for kernels is Côte d'Ivoire.

As part of the Americas, significant quantities [30% of its exports] are directed to the USA. Europe imports 38% of Brazil's cashews, with

Italy as the top importer, followed by Germany and the Netherlands.

The cashew nut industry is supported by the Brazilian government, with promotional activities being led by the Brazilian Trade and Investment Promotion Agency, which supports and arranges the presence of Brazilian actors in major European trade fairs and events.

### Brazilian companies

Brazil owns large processing facilities that are typically run at full capacity. Therefore, Brazilian companies have started investing in production in Africa.

Covering over 35% of Brazilian total cashew crop, USIBRAS is the country's largest processor, followed by Amedoas, Cione, and Carino.

## Côte d'Ivoire, the world's largest in-shell producer

With an estimated production of around 900,000 tonnes in 2020/2021, Côte d'Ivoire is the top producer of raw, in-shell cashew nuts. As the country does not have proper processing facilities, it exports its production to other countries, mainly Vietnam and India. However, change is expected as the country – largely supported by national and international

support – is rapidly increasing its processing capabilities, from only 8,000 in 2016 to more than 20,000 in 2020.

While the government supports cashew nut investments, the Cotton and Cashew Board takes care of production, marketing, and promotion of processing in the country.

### Côte d'Ivoire companies

Olam International is also a big player throughout Africa. It is the largest processor in Côte d'Ivoire. Examples of other large processors are SITA, FMA, CILAGRI, and Cajou des Savanes.

## Tip:

- Participate in the [World Cashew Convention](#) to gain insight into the global cashew industry.

## 6 European imports of cashew nuts from Cambodia

European imports of cashew nuts from Cambodia are very small. However, according to Veng Sakhon - Minister of Agriculture, Forestry and Fisheries - Cambodia is set to increase its exports of processed cashew nuts to Europe.<sup>12</sup>

### Information on indirect exports

As mentioned, Vietnam is by far the largest global cashew nut exporter. To supply several countries and regions around the world, Vietnam relies on its internal production but also greatly relies on imports of in-shell cashew nuts, with African nations topping the list.

According to the Cambodian Ministry of Agriculture, Forestry and Fisheries, Cambodia

exported more than 99% of its cashew nuts to Vietnam in the first 10 months of 2021.<sup>13</sup>

Vietnam being the world's top cashew nuts exporter, it is quite obvious that a significant share of Cambodian cashew nut exports to Vietnam are processed and re-exported to third markets, such as Europe.

## Key takeaways:

- Competition is fierce. You must be well prepared to enter the EU market and provide value-added products.
- Try to understand why EU buyers purchase from specific countries. What do they offer? How can you provide additional value?
- Study your competitors. To enter the market, you must be at least as good.
- Gather other Cambodian cashew nut producers and try to solicit support from the Cambodian government (promotional activities, presence at major trade fairs, etc).
- Consider collaborating with EU companies, as African companies sometimes do.
- Fair-trade accreditations are very trendy and could give you a serious boost. Measure the costs associated with and consider applying for an accreditation.
- Harvest seasons are different from those of major cashew-producing countries, which offers a great competitive advantage and allows Cambodia to reduce EU's fluctuations in imports.
- EU imports of cashew nuts are subject to major fluctuations. Take advantage of this by always being ready to ship.
- Keep an eye on competing countries and companies. Some issues (climate, drought, political instability, logistics problems) might affect them. You should be able to take advantage of such situations.



# III Trends and consumer needs



The nut market is one of the fastest growing in Europe, sustained by a shift in consumption habits, a rising demand for healthy snacking, and product innovation.<sup>14</sup>

Moreover, sustainable and ethical aspects should be strongly considered, as the market shares of these products are expected to grow substantially. Investing in more sustainable production and partnering with European buyers to develop and promote healthy and sustainable products will increase opportunities for exporters from developing countries.

## 1 Healthy snacking

Correlated to the cashew nut trend in Europe is the quick increase of healthy snacks consumption. This is largely influenced by the rising demand for healthier products than chocolate or other sugary items. Nuts are expected to experience the highest growth within the snack segment.

The benefits of cashew nuts are numerous, such as their high levels of phosphorus, magnesium,

and copper, attributes that are quite rare in other food items. Apart from that, cashews have the lowest fat content among nuts and they also are rich in phytosterols and tocopherols.

As they become more aware and concerned about their health, Millennials and Gen Z consumers are strongly driving this trend.

## 2 New flavours

Flavoured cashew nuts are quickly gaining market shares in Europe, with flavours as diverse as “jalapeño”, “tamari-roasted” or “sour cream

and onion”. New coatings are also quite trendy, with chocolate-coated cashew nuts being the most popular today.

## 3 Cashews as ingredients

Although mostly consumed as a snack, cashew nuts are gaining popularity in the [healthy] ingredient segment, in which its use varies from breakfast cereals to cashew nut milk, butter, cheese, bars, and chocolate products. European consumers are increasingly using cashew nuts at home, using it as an ingredient in salads and other meals.

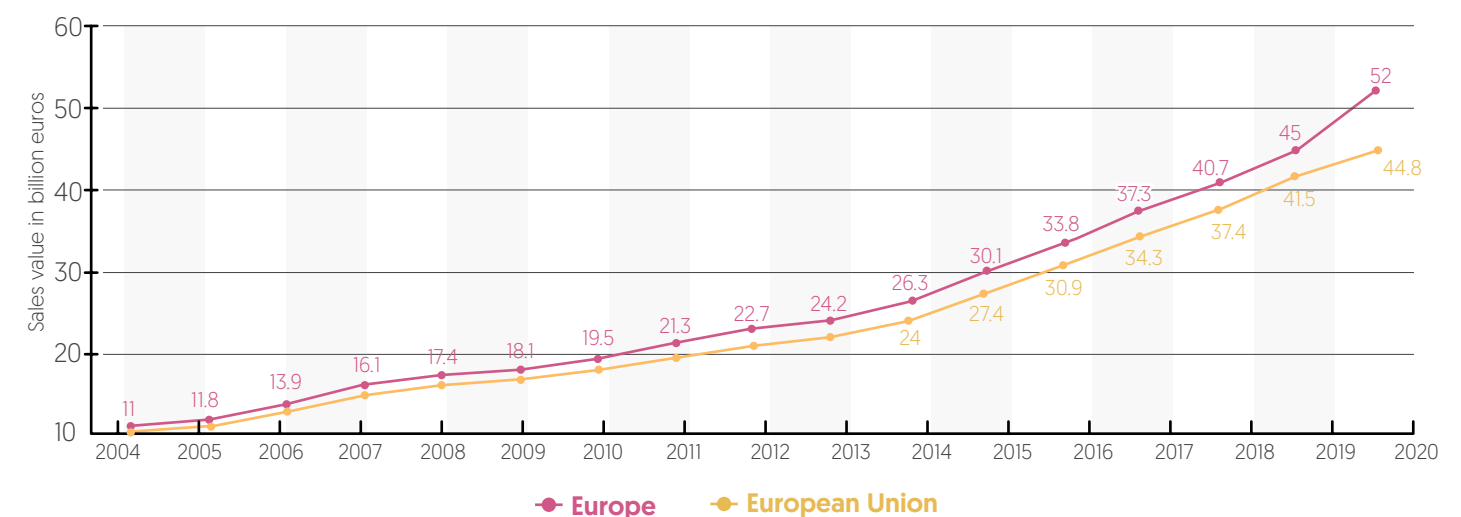
Cashew pieces offers a wide array of applications within the food processing industry. Less expensive than whole kernels, quality pieces are hard to find. **Suppliers who are able to provide reliable and quality pieces will have a great advantage over competitors.**

## 4 Sustainable sourcing

Sustainability has become one of the most important topics in the world, due to the risk of global nature loss in a short time and customers’ interest in clean and healthy food.

This benefits the lucrative organic food industry in Europe. In 2020, the market reached \$52 billion [\$44.8 billion in the European Union], an increase of 15% compared to 2019.

**Figure 5: Organic retail sales value in the European Union and Europe from 2004 to 2020 in billion euro<sup>15</sup>**



While the average per capita expenditure on organic food in the continent was €85 in 2019, large disparities between countries exist. Germany, followed by France and Italy, are the largest markets for organic food, while the highest consumption per capita is found in the Alps countries [Switzerland, Austria] as well as in the Nordic countries.

Per capita spending on organic consumption has more than doubled between 2011 and 2020. This increase does not take into account the COVID-19 crisis, which caused an additional strong increase in demand for organic products.

Organic sales are booming, however, this has not correlated to an increase in organic production within the EU. Indeed, organic production rarely



exceeds 15% in almost all EU countries. Thus, the EU heavily depends on imports, especially in the organic segment. This offers good opportunities to newcomers as importers need to identify and tap new sources.

Even for conventional producers, it may be promising to engage in an organic transition, as there are usually more opportunities for SMEs and less fierce price-driven competition in this sector.

5 Vertical integration

Although the overall demand for cashew nuts in Europe is quite stable, importers face problems related to fluctuations in price and supply. To address these problems, multiple European companies are investing in productions sites

Several sustainability initiatives are already in place in the EU and in cashew-producing countries. Consumers and retailers, in general, are becoming more interested in sustainably produced items. The EU “farm to fork” strategy is an example of such a sustainability initiative. It “aims to accelerate our transition to a sustainable food system that should: have a neutral or positive environmental impact, help to mitigate climate change, adapt to its impacts, and reverse the loss of biodiversity.”<sup>16</sup>



in developing countries. To this point, these countries have mainly been in Africa.

Attracting these increasing investments would provide huge opportunities for growth for Cambodian producers and exporters.

Tips:

- Display and promote the benefits of cashew nuts on your packaging.
- Learn more about the general trends of the edible nuts sector by reading the [CBI Market Statistics and Outlook study for Processed Fruit, Vegetables and Edible nuts](#).
- Check the websites of major European trade shows and exhibitions – such as Anuga, BioFach and SIAL - to be aware of the latest trends and innovations.
- Use the online [3S Platform](#) to trace, analyse, and improve cashew nut supply.

Table 2: Selected Cambodian cashew nuts producers

Company	Background	Website
	Khmer Organic Cooperative was established in 2014 to promote regenerative agriculture and to provide organic, locally grown food to consumers in Cambodia. They work along the whole agricultural supply chain from farm gate to markets. In cooperation with various stakeholders and development partners they promote sustainable agriculture and support small-holder farmers and farmer communities. Khmer Organic Cooperative’s exporting efforts are focused on premium Cambodian products. Khmer Organic cashews are sustainably cultivated by Cambodian farmers and are the best grade cashews from Kampong Thom province.	<a href="https://khmer-organic.com/">https://khmer-organic.com/</a>
	Founded in 2017, Santana Agro Products Produces and trades standard quality agricultural products domestically and internationally.	<a href="https://www.facebook.com/santanaagroproducts/">https://www.facebook.com/santanaagroproducts/</a>
	<p>Handcrafted Cashew Nuts Stung Treng was established in 2021 by a cashew-producing family. Like the majority of Cambodian cashew producers, they have been selling their raw cashew nuts to middlemen. Its mission today is to promote inclusive growth and help the community by moving up the value chain.</p> <p>Their semi-mechanized cashew nuts processing enterprise in Stung Treng province feeds not only their roasters (whom 80% are women!) and their families but also their engineers and vendors.</p> <p>Stung Treng Cashew offers premium quality products, with each cashew nut being carefully selected to offer the best quality.</p> <p>The company aims to provide cashew nuts to both retail and wholesale customers in East Asia, Europe, and North America.</p>	<a href="https://stungtrengcashew.com/">https://stungtrengcashew.com/</a>



# IV Requirements

## 1 Legal requirements

### A. Tariffs and rules of origin

The rules of origin determine the origin of goods, and their place of production and/or manufacture.

Cambodia is part of the EU's Generalised Scheme of Preferences, which aims to help developing countries expand their exports.

Thus, Cambodia enjoys preferential origin rules.

- 0% tariff - if imported directly
- 5.8% - if imported through a third country

To benefit from a 0% tariff, the product must:

- Be wholly obtained and originate from Cambodia.
- Its sugar weight must not exceed 40% of the final product weight.

### B. Value-added tax

Cashew nuts are subject to a 7% value-added tax when entering the European Union.

### C. Contaminants control

All foodstuffs sold in the European Union, including imported products, must be safe.

Contaminants in food are undesirable and hazardous chemicals can make people sick. These compounds can be found in food as a result of the various stages of manufacturing, packing, transportation, and storage.

Although quite rare, low levels of E. coli and salmonella are sometimes found in cashew nuts and can cause illness. Cashew nut processors should consider salmonella and E. coli as major public health risks in their hazard analysis and critical control point (HACCP) plans.

Official food controls can happen at any time, from the moment of import and during all stages

of marketing. In case of non-compliance with the European General Food Law, individual cases are reported through the Rapid Alert System for Food and Feed, which can be consulted at any time by the general public.

It is important to know that special import conditions – or even a full import ban - can be implemented for countries that repeatedly do not comply with the European Food Legislation. These strict conditions include laboratory test results for a certain percentage of shipments from specified countries.

To reduce pollutants in food, the European Union imposes strict regulations by establishing limits for specific pollutants.

- Find the European Commission Regulation here: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02006R1881-20210831>
- Follow the Codex Alimentarius Code of Hygienic Practice for tree nuts: <https://www.fao.org/fao-who-codexalimentarius/codex-texts/codes-of-practice/en/>

### D. Mycotoxins

Bans of nuts are sometimes due to high levels of mycotoxins (aflatoxins and ochratoxin A).

- Aflatoxin level must be below 5 µg/kg for aflatoxin B1 and 10 µg/kg for the total aflatoxin content (B1, B2, G1 and G2).

To prevent risks of mycotoxins, store/transport your products in a low-humidity environment.

### E. Pesticide residue

Maximum residue levels (MRLs) for pesticides in food products have been established by the European Union. If your product includes illegal pesticide residues or higher levels of pesticide residues than permitted, it will be removed from the European market. Samples and testing are often conducted by both government and nongovernmental organisations, which frequently results in public blaming and shaming of the business if residues are discovered. The European Union provides a regularly updated

list of pesticides approved for use in the EU. The European Commission passed 12 new laws in 2019, requiring adjustments to over 80 different pesticides.

**List of pesticides:** <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=celex:32011R0540>

Note that excessive levels of pesticides residues are relatively rare in the cashew nut industry. This is due to the removal of the shell that happens prior to the import.

### F. Heavy metals

The maximum level of cadmium in cashew nuts is 0.20 mg/kg wet weight.

### Tips:

- Read more about MRLs on the European Commission [website on maximum residue levels](https://food.ec.europa.eu/plants/pesticides/maximum-residue-levels_en). [https://food.ec.europa.eu/plants/pesticides/maximum-residue-levels\\_en](https://food.ec.europa.eu/plants/pesticides/maximum-residue-levels_en)
- To be prepared for any new changes in the MRLs, read the [ongoing reviews of MRLs in the European Union](#).

## 2 Additional requirements from buyers

### A. Quality requirements

The quality of cashew nut kernels is determined by their shape, size, colour, and the percentage of defective produce, often determined by weight.

The most common standard used in Europe is the one established by the [United Nations Economic Commission for Europe](#) (UNECE)<sup>19</sup>.

Here are the most common criteria used to determine cashew nut quality:

- Class — 3 main classes: Extra Class, Class I and Class II, according to the colour of the kernel's skin and permissible defects.



- Note that cashew for final consumption must almost exclusively meet the highest standard “extra class”.

Find detailed information on the three main classes here: [https://www.nutfruit.org/files/tech/1548321932\\_Cashew\\_Tech\\_Kit\\_English\\_Final.pdf](https://www.nutfruit.org/files/tech/1548321932_Cashew_Tech_Kit_English_Final.pdf)

- Grading — Whole kernels are graded based on the number of cashew nuts in one kilo or one pound (0.454 kg). For instance, 210 nuts per pound equals 465 nuts per kilo. Broken kernels are graded according to the diameter of the pieces<sup>20</sup>.
- Style and skin colour — In practice, quality and price are usually determined based on the characteristics of the cashew nuts, thereby combining the style (whole, splits or pieces) with the grade and look of the skin.

### B. Packaging requirements

Although no general rule exists for the packaging, cashew nuts are commonly exported in vacuum-sealed 10kg to 25kg polybags. Cashew nuts can also be exported in airtight tins.

Packaging should be of cubic shape, facilitating the efficient use of pallets and containers spaces. Dimension can vary but should be compatible with standard container and pallet dimensions.

### C. Labelling requirements

The name of the products, either “cashew nuts” or “cashew nut kernels” should be displayed on the packaging.

- When exporting in bulk, your package must include:
- Name of the product
- Lot identification number (can be replaced by an identification mark)
- Name and address of the manufacturer, packer, distributor or importer (can be replaced by an identification mark)
- Storage instructions

For retail packaging, product labeling must comply with the European Union Regulation on the provision of food information to consumers, which defines requirements for origin labelling, nutrition labelling, allergen labelling and clear legibility. As cashew nuts are listed as a product which can cause intolerances or allergies, allergen information must be visible on the packaging.

### Tips:

- Read CBI study on [buyer requirements for processed fruit and vegetables](#) for a general overview of buyer requirements in Europe.
- Check the CashewInfo portal to become familiar with cashew standards.
- Do a self-assessment using the producer starter kit via the amfori BSCI website.

## V Certifications and certifiers

As buyers and consumers increasingly demand standards above EU regulations, being certified is deeply important.

A certificate provides certainty to customers worldwide, as it attests that your management system, process, or product meets objective (internationally) recognised criteria and related obligations.

Certification can improve efficiency: your operations are more sophisticated, more

efficient, and easier to control. It identifies processes within your company and highlights areas for improvement. A certification is reassuring to the relevant authorities, as it avoids any debate about whether you are complying with rules and legislation.

Getting certified will give your product a good reputation on the (international) market. It is also an excellent marketing tool and offers many promotional possibilities.

Table 3: Most common food-related certifications

Certification Scope	Certification Program	Export Market
Organic Agriculture	EU Organic 	To reach the European organic market, the whole chain of organic production needs to be inspected.
Food Safety	HACCP 	Compliance to EU regulations is mandatory. HACCP is based on these regulations and proves that you respect these rules.  Although not mandatory, HACCP proves that you respect EU regulations. It is strongly advised to get it.  Operators need to implement and maintain a food safety management system in their facility.
	ISO 22000 	Most comprehensive standard accepted all over the world.  This is applicable to all organisations in the food supply chain.



## 1 General Certifications

### Highly recommended certification

HACCP is not mandatory but it is mandatory to comply with EU regulations and laws. It is thus strongly advised to get this specific certification.

Most European buyers will ask for certifications recognised by the Global Food Safety Initiative [GFSI]. For cashew nuts, the most common certification programmes are:

- International Featured Standards [IFS] [common in Germany]
- British Retail Consortium Global Standards [BRCGS] [Common in the UK]
- Food Safety System Certification [FSSC 22000]

Please note that this list is not exhaustive and food certification systems are constantly under development. Most food safety certification programmes are based on existing ISO standards like the ISO 22000.

ISO 22000 is a very good starting point while FSSC 22000 includes some additional requirements

technical details concerning production. ISO 22000 can be easily upgraded to FSSC 22000, in many cases by the same certifier that provides the ISO certification.

Most of the mandatory requirements related to the import of processed vegetables and fruits in Europe are related to food safety.

### Tips and further reading:

- Buyer requirements: <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/buyer-requirements>
- The General Food Law, legislative framework regulation for food safety in Europe: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32002R0178>
- The European Food Safety Authority [<https://www.efsa.europa.eu/en>] (EFSA), in charge of developing particular food safety regulations and establishing frameworks for official food controls.

## 2 Organic certification

For an imported product to be sold as organic, it must meet standards equivalent to those of European products. There are procedures in place for this purpose, which all importers

must follow if they wish to market a product as organic. These procedures depend on the origin of the products.

### Mandatory certification/certificate

- The EU Organic [EU Regulation EEC. No. 834/2007 of Organic Production] which regulates the production, processing, distribution, importation, and labelling of organic food and agricultural products - is mandatory.

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32007R0834&from=EN>

- This regulation is completed with additional rules, specifically Regulation [EC] 889/2008]

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32008R0889>



**This regulation covers the HACCP principles, which means you do not need to seek the HACCP certification if you already have the EU Organic one.**

- The Electronic Certificate of Inspection [eCOI]], issued by your certifier in the supplying country and registered in the TRACES system, is mandatory for your products to be legally allowed in the EU.

### Please find:

- Detailed rules concerning the import of organic products from third countries]. <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32008R1235>



EU organic logo displayed on a cashew nut pack



### 3 Sustainability and Corporate Social Responsibility

Sustainability certifications focus on different aspects such as environmental protection and ethical behaviour towards farmers, employees, and animals. Some certificates deal with one aspect only while others cover a broad range of services.

The two most commonly used sustainability certification schemes are Fair-trade and Rainforest Alliance.

**Examples of certifications:**

- **Reducing CO2 emission – Verified Carbon Standard, MyClimate, and ICT Carbon Footprint Certifications.** These certification schemes usually follow standards for measuring greenhouse gas emissions such as ISO 14067.
- **The preservation of forest resources - Rainforest Alliance, FSC, PEFC.** These certification schemes are important for packaging materials.
- **Bio-based and recyclable packaging – OK bio-based, DIN-Geprüft bio-based, OK compost, RSB, and Recycled Content Certifications.**
- **Social and ethical impact (Monitoring and auditing) – Fair-Trade, SMETA, Ethical Trading Initiative, amfori BSCI, BCorp, and Fair for Life.**
- **A wider range of environmental aspects – Cradle to Cradle, Planet Proof, ISO 14000.** These include private schemes of European retailers such as ProPlanet (REWE) and Edeka Panda (Edeka).
- **Organic and pesticide-free food – EU organic, KRAV, Naturland, Demeter, AB France, Soil Association, SCS Pesticide Free, Zerya.**



### 4 Main guidelines to get certified

1. Find a buyer.
2. Select a certification scheme that suits operational and EU requirements.
  - Make yourself familiar with the target market. Which certifications are required by your potential customers? Which may offer promising value-added?
  - Determine the next steps. Assess the finance required to upgrade to such certification. [Price of the certification, modification of the production set up, future plans etc]
  - To get yourself familiar with standards, you can use this website:  
<https://standardsmap.org/en/identify>
  - The Standards Map provides online access to a wide range of information related to sustainability initiatives, standards and trends, allowing businesses to pick the right certification or follow the right standards.
3. Develop and implement the certification system requirements in your organisation.
4. Conduct an internal audit.
5. Conduct a management review.
6. Adjust according to the output of the internal audit and management review.
7. Verify the corrective actions.
8. Contact a certification body that has the accreditation to issue a valid certificate.
9. Send an application to a certifying body (e.g., Control Union)
10. The application is reviewed by the certifying body.
11. Preparation of the contract.
12. Reviewing of the contract by the applicant.
13. Sign and send back the contract to the certifying body.
14. The certifying body officially registers the applicant as a ‘client’ and arranges the audit.

**Before the audit**

Some documents need to be sent to the certifying body. These are meant to provide a basic understanding of the company’s operation and its current quality management system. This information will be verified during the onsite inspection.

**Factory audit**

- 3 components
- Observation of the factory
  - Worker interviews
  - Documents check



If the client complies with the standards, the certificate is issued.  
If not, some corrective actions need to be done.



**Time limit:**

Minor non-compliance:  
**2 months**

Major non-compliance:  
**1 month**

The certificate is then issued.

Potential certifiers are Control Union and Bureau Veritas.

Table 4: Potential certifiers in Cambodia

<b>ControlUnion</b>	
	 N°28, Street 288, Sangkat Olympic, Chamkarmon, 12312 Phnom Penh
	 023 966 496
	 cambodia@controlunion.com
	 <a href="https://www.petersoncontrolunion.com/en">https://www.petersoncontrolunion.com/en</a>
<hr/>	
<b>Bureau Veritas</b>	
	 #1186, St.371, Sangkat Steung Meanchey, Khan Meanchey, Phnom Penh, Cambodia.
	 017 555 638 / +85523 962 280
	 sreymarch.seng@vn.bureauveritas.com
	<a href="mailto:dwijenayaka@controlunion.com">dwijenayaka@controlunion.com</a>
	 <a href="https://group.bureauveritas.com/">https://group.bureauveritas.com/</a>

# VI Logistics

Cashew nuts must be stored at particular temperatures, meet certain ventilation conditions and perhaps most importantly, humidity levels which need to be under 65% in order to avoid damages caused by enzymatic changes and mould.

To avert the many pitfalls in logistics and get your products to market with the conditions agreed upon, working with a good logistical operator is crucially important.



## 1 Transport/incoterms

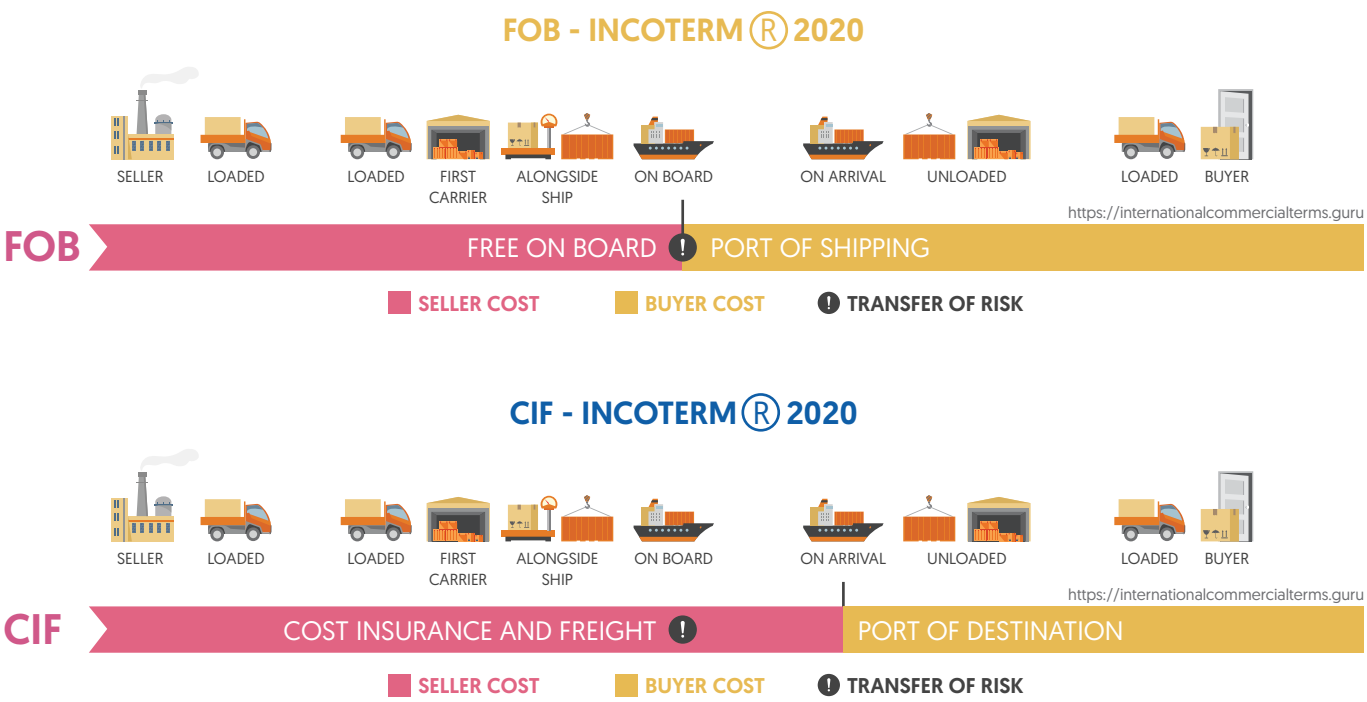
Incoterms [international commercial terms] are a system of international rules that govern international trade operations.

These rules define the distribution of costs, risks, and import and export formalities between the seller and the buyer in the process of delivering the goods. It allows each party to make the necessary arrangements related to its obligations: insurance, costs [logistics, taxes...] and formalities [regulatory, customs...]. Above all, it allows you to avoid disputes.



The most common incoterms are FOB and CIF.

- **FOB/Free on Board.** The seller must clear the goods through customs and deliver them on board a vessel designated by the buyer. The transfer of costs and risks takes place when the goods are on board the vessel at the port of departure.
- **CIF/Cost Insurance and Freight.** This incoterm requires the seller to conclude the contract of carriage on behalf of the buyer, but also to take out insurance on behalf of the buyer to cover the goods during the carriage. Thus, the goods are transported at the buyer's risk. According to this organisation, there is a gap between the transfer of the expenses which takes place at the port of arrival and the transfer of the risks which takes place at the port of departure.
- It is frequently used because it allows the exporter to provide a complete solution [customs clearance, transport and insurance] without engaging its responsibility since it is the buyer who is responsible for the goods during transport.



2 Logistics steps

Do your research to identify the right logistics provider. Competitive pricing, good services, reliability, and the ability to provide good insurance providers (if CIF) are parameters to look for. It is crucial that you familiarise yourself with some basic information before engaging with a potential buyer. How long does it take to ship to EU? What is the best route or port of destination for your target market? How about combined loads, etc? Importers may have a lot of questions related to shipping options.

1. Do your research to identify the right logistics provider. Competitive pricing, good services, reliable, on time, and good insurance provider (if CIF) are parameters to look for
2. Before negotiating with your buyer, be sure to have FOB and CIF quotations ready. You may request these quotations from your logistics provider.
3. Negotiate with the buyer the terms of the shipment: products, volume, frequency of shipments, delivery time, testing, and payment. Importers often start with small orders [just a few pallets] as they want to run a trial first.
4. Usual payment instalment: 50% with all documents ready and product ready to ship, the other 50% when the product is sold.
5. Do your homework before negotiating with the buyer. Know the common length of the logistics process, how long does it take to produce one container load etc.
6. Understand the packaging. Good logistics depends on good packaging.
7. Arrange basic testing on anything relevant before shipping (MRLs, contaminants etc., organic if needed), to avoid liability issues and reinforce goodwill with the buyer.
8. Sign a contract with the buyer with payment and shipment terms.
9. Package the goods correctly (in compliance with EU law).
10. Send goods. You may have to track them. Be aware of when the product will arrive at the port of destination.

Important:

- CIF price is higher than FOB
- FOB or CIF is negotiated between the buyer and seller
- Factors to choose FOB or CIF include the relations between the producer and the shipping companies, geostrategic location etc.
- It is recommended for companies to have both prices ready [FOB and CIF] when beginning to negotiate with buyers. Price is indicated usually in container loads.
- Usually, importers in Europe are happy to take over shipments at big ports.
- Big ports include Rotterdam, Hamburg, and Antwerp in continental Europe, other ports in the Mediterranean [Valencia, Genoa].

Tips and useful readings:

- For information on the safe storage and transport of edible nuts and dried fruits go to the website of the Transport Information Service. [https://www.tis-gdv.de/tis\\_e/ware/inhalt.htm/](https://www.tis-gdv.de/tis_e/ware/inhalt.htm/)
- For more information on incoterms: <https://www.velotrade.com/guides/what-is-incoterms-2020/>



### 3 Freight forwarding companies



#### DHL Express

571, 575 Russian Federation Blvd. [110], Phnom Penh, Cambodia  
<http://www.dhl.com.kh/>



#### World Bridge Group of Companies

The Bridge level 38, Village, No 14 National Assembly Street, Phnom Penh, Cambodia  
<https://www.worldbridge.com.kh/>



#### DHL Global Forwarding

11th Floor, Heng Asia Building #22, Mao Tse Toung Boulevard [245], 12305, Cambodia  
<http://www.dhl.com.kh/>



#### CFS Cam Freight Services Co., Ltd.

313 Street, 85c Phnom Penh, 12152, Cambodia  
<https://www.ups.com/kh/en/contact.page>



#### UPS Express Cambodia

Camkocity R1, Camko Street Kongkeo Phos Village 2 Commune, Phnom Penh, Cambodia  
<https://www.ups.com/kh/en/contact.page>



#### Maersk (Cambodia) Ltd.

No. 298, Mao Tse Toung [St. 245], Next to InterContinental Phnom Penh, Room 8A, Mao Tse Toung Boulevard [245], Phnom Penh, Cambodia  
<http://www.maerskline.com/>



#### SRVC Freight Services Cambodia Co., Ltd.

Tuol Kouk District Hall, Phnom Penh 12150, Cambodia  
<http://www.srv-cambodia.com/>



#### DB Schenker (Cambodia) Limited

Ty Thai Heng Long Building, No. 78, 7th Floor, Mao Tse Toung Boulevard [245], Phnom Penh, Cambodia  
[http://www.dbschenker.com.kh/log-kh-en/company/contact\\_us.html](http://www.dbschenker.com.kh/log-kh-en/company/contact_us.html)



#### Swift Freight Logistics Limited

Plot 61, 570- St 331, Phnom Penh, Cambodia  
<https://www.swiftfreightlogistics.com/>



#### CSKHA LINES CO., LTD.

2nd Floor, Kim Hap Bldg., #86EA2, Street 388, Sangkat Prey II, Toul Svay, Cambodia  
<http://www.heung-a.com>



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from Cambodia to Europe

