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The diverging South : comparing the cashew sectors of Tanzania and Vietnam

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Author: Kilama, Blandina

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Appendix: Tables, graphs, figures, photos

Tables

2A1	Poverty levels, inequality and human development index for Tanzania and Vietnam (various years)	152
2A2	Tanzania export volume by agricultural commodities (000 tonnes, various years)	152
2A3	Tanzania real annual growth rates (% , various years,)	153
3A1	Average FOB prices of cashew nut in USD/lb (Cochin/Tuticorin)	153
3A2	Export of Cashew kernels - Tanzania	154
3A3	TZ: Estimated indicative price for a kilo of Cashew (2008- 2011)	154
3A4	TZ:Cashew production by district/region 1998/99 - 2010/2011	156
3A5	VN: Cashew production by districts in Binh Phuoc region 2004 to 2009	158
4A1	Sampled households from each district, ward, village and hamlet	158
4A2	Ratios of density, output per tree and yield by Tanzania over Vietnam	158
4A3	Workers used for producing cashew in Tanzania and Vietnam	159
4A4	From seed to cashew as a tree crop	159
5A1	Prices of raw cashew nut in Tanzania 2006/07 to 2010/11	164
5A2	List of key informants' interviews conducted	165

Graphs

3A1	Tanzania: Raw cashew production and value (1961- 2006)	153
3A2	Tanzania and Vietnam: Raw cashew production (various years)	155
5A3	Leading natural rubber producers	167
5A4	Production of raw cashew and rubber in Vietnam (various years)	167
5A5	Harvested area of natural rubber in Vietnam (various years)	168

Figures

4A1	Land distribution in hectares	160
4A2	Distribution of trees per household	160
4A3	Labour distribution in hectares	161
4A4	Output per hectare in the last season	161
4A5	Yield distribution	162
4A6	Trees density distribution	162
4A7	Output per tree distribution	163
4A8	Distribution of labour per tree	163

Photos

1A	Some of the visited facilities	166
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Table 2A1 Poverty levels, inequality and human development Index for Tanzania and Vietnam (various years)

	Poverty headcount		Poverty headcount rural		Poverty headcount \$1.25		GNI index		HDI	
	Tanzania	Vietnam	Tanzania	Vietnam	Tanzania	Vietnam	Tanzania	Vietnam	Tanzania	Vietnam
1992	38.6		40.8		72.59		33.83			
1993		58.1		66.4		63.74		35.68		
1998		37.4		44.9		49.65		35.52		
2000	35.6		38.6		88.52		34.62		33.22	50.53
2002		28.9		35.6		40.05		37.55	34.65	51.93
2004		19.5	25			24.18		39.16	36.11	53.29
2006		16		20.4		21.31		37.77	37.50	54.72
2007	33.4		37.4		67.87		37.58		37.93	55.40
2008		14.5		18.7		13.07		37.57	38.61	55.97

Source: World Bank WDI and UNDP (Human Development Data)

Table 2A2 Tanzania export volume by agricultural commodities ('000 tonnes, various years)

Year	1961	1965	1976	1973	1981	1986	1990	1995	2000	2002	2003	2004	2005	2006
Coffee	24.9	51.1	45.4	60.3	67.9	50.4	62.7	48.0	54.5	36.4	46.2	38.6	46.1	31.5
Cotton	30.1	56.2	60.8	60.0	44.5	31.6	46.3	70.9	36.8	33.3	40.3	47.3	112.9	5.5
Sisal	200.9	210.2	204.4	133.4	57.5	15.1	7.7	11.3	13.4	12.8	13.0	11.9	9.3	6.1
Tea	3.2	4.3	6.1	9.5	15.5	9.5	14.8	21.6	22.6	24.3	20.9	21.7	21.8	22.4
Tobacco	0.8	1.7	4.1	6.1	11.0	7.2	5.8	17.1	19.2	24.2	22.5	29.2	31.1	25.0
Cashewnuts	40.0	64.6	70.9	109.9	25.2	17.8	7.4	75.6	101.8	75.9	73.4	83.2	62.0	66.3

Source: Bank of Tanzania (BOT) and Economic Survey (various years)

Table 2A3 Tanzania real annual growth rates (% , various years)

	2001	2005	2010
Agriculture	4.9	4.3	4.2
Fishing	4.8	6	1.5
Mining and quarrying	13.9	16.1	2.7
Manufacturing	5	9.6	7.9
Electricity, gas	5.9	9.4	10.2
Communication	8.7	18.8	22.1
Financial intermediation	6.9	10.8	10.1
Education	11.4	4	7.3
Health	5.6	8.1	6.9
GDP(constant 2001 price)	6	7.4	7

Source: URT (2011): National Accounts of Tanzania

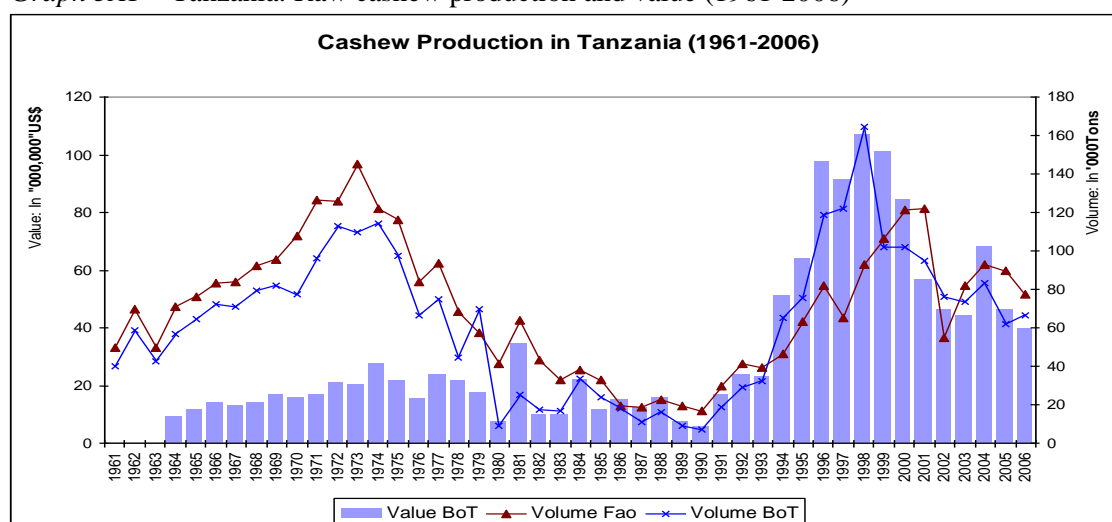
Table 3A1 Average FOB prices of cashew in US\$/lb (Cochin/Tuticorin)

Cashew Grade	2008			2009		
	8-Feb	31-May	29-Nov	28-Feb	31-May	22-Aug
W-240	3.45-3.60	3.40-3.45	2.70-2.75	2.50-2.75	2.80-2.85	2.85-290
W-320	3.30-3.40	3.2	2.15-2.25	2.00-2.20	2.40-2.45	2.55-2.60
W-450	3.10-3.20	3	2	190-2.00	2.25	2.35-240
LP	1.95	2	1.4	1.3	1.40-1.45	1.45-1.50
WB	2.45	2.35-2.40	1.6	1.5	1.75-1.80	2.10-2.15
SW320	3.10-3.15	3.05	2.05	1.90-2.00	2.30-2.35	2.35-2.40
SW360	3.00-3.05	2.9	1.95	1.80-1.90	2.15-2.20	2.3
SSW	2.90-3.00	2.55	1.9	1.70-1.85	1.80-1.85	1.9
WS	2.45	2.45-2.50		1.5	1.75-1.80	2.10-2.15

Note: W = Whole White, SW = Scorched Wholes, SSW = Scorched Wholes Seconds, SS = Scorched Splits, SB = Scorched Butts, SP = Scorched Pieces, LP = Large Pieces

Source: *Cashew Week*, various issues.

Graph 3A1 Tanzania: Raw cashew production and value (1961-2006)



Source: Bank of Tanzania, Cashewnut Board of Tanzania and FAOSTAT | © FAO Statistics Division 2010

Table 3A2 Export of cashew kernels ~Tanzania

Season	Exports of kernels	
	Quantity (Tonnes)	Value (USD)
2005/2006	2,821.057	11,926,051
2006/2007	4,984.746	19,328,606
2007/2008	4,925.068	16,952,283
2008/2009	4,179.675	19,409,725
2009/2010*	3,690.955	19,938,821

* Exports up to 23 June 2010

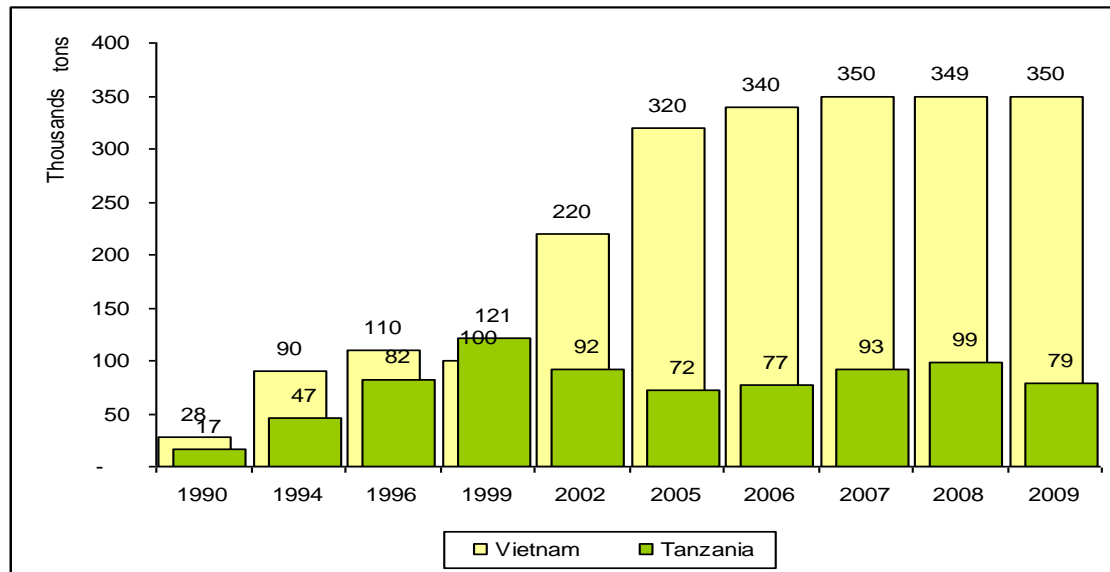
Source: Cashewnut Board of Tanzania

Table 3A3 Tanzania: Estimated indicative price for one kg of cashew (2008-2011)

Expenditure/different costs	(2007-08)	(2008-09)	(2009-10)	(2010-11)
<i>Operating costs:-</i>				
Primary Society Levy	30.00	50.00	50.00	50.00
Union Levy on provision for services	14.00	21.00	21.00	21.00
District Councils Levy (5%)	30.50	33.75	35.00	40.00
Sub Total	74.50	104.75	106.00	111.00
<i>Marketing costs:-</i>				
Warehouse Operator costs	8.00	17.00	17.00	15.00
Transport of cashew to warehouse	50.00	65.00	55.00	50.00
Deductions in weight/Shrinkage 2% of Indicative price	11.00	13.50	14.00	16.00
Fumigating Warehouse (Primary Society)	2.00	2.00	2.00	2.00
Sub Total	71.00	97.50	88.00	83.00
<i>Finance costs</i>				
Interest on Loan	15.00	8.00	15.00	15.00
Cost of Loan	3.00	0.00	3.00	3.00
Sub Total	18.00	8.00	18.00	18.00
<i>Cost of purchasing cashew</i>				
Cost of Bags	27.50	31.25	29.00	31.25
Crop Insurance	2.00	1.00	1.00	0.00
Cash Insurance	2.50	1.00	1.00	0.00
Distribution of bags	1.00	1.00	1.00	1.00
Transporting money	6.00	5.00	5.00	0.00
Sub Total	39.00	39.25	37.00	32.25
Total expenditure	202.50	249.50	249.00	244.25
Farmer's price per kilo (indicative price)	610.00	675.00	700.00	800.00
Cost of raw cashew in warehouse per kilo	812.50	924.50	949.00	1044.25

Source: Cashewnut Board of Tanzania, 2010

Graph 3A2 Tanzania and Vietnam: Raw cashew production (various years)



Source: Cashewnut Board of Tanzania, General Statistics office of Vietnam GSO; Vietnam Cashew Association

Table 3A4 Tanzania: Cashew production by district/region 1998/1999-2010/2011 (in tonnes)

District	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11
Mtwara (M)	3.822	1.370	9.401	286	-	-	1.682	2.700	2.359	9.425	424	434	769
Mtwara (V)	7.260	6.118	7.151	5.126	7.118	5.025	4.739	4.690	5.096	-	5.190	5.336	11.203
Tandahimba	20.465	21.729	21.240	12.563	17.796	14.090	10.832	15.278	19.520	24.121	20.702	24.436	35.997
Newala	10.944	10.264	10.987	4.934	9.522	13.286	5.816	5.520	10.520	9.111	6.755	9.270	14.230
Masasi	14.563	18.955	14.674	8.394	21.457	9.756	15.398	14.434	16.510	14.371	11.261	7.624	17.218
Nanyumbu	-	-	-	-	-	-	-	-	-	5.178	6.064	2.731	4.453
Ex-Godown													
Mtwara	10.157	21.500	-	-	-	-	-	-	-	-	-	-	-
<i>Mtwara</i>	<i>67.211</i>	<i>79.935</i>	<i>63.453</i>	<i>31.303</i>	<i>55.893</i>	<i>42.158</i>	<i>38.466</i>	<i>42.622</i>	<i>54.006</i>	<i>62.206</i>	<i>50.396</i>	<i>49.831</i>	<i>83.871</i>
Lindi (M)	-	-	116	130	-	-	100	500	200	281	378	41	1.452
Lindi (V)	2.626	4.150	3.982	3.960	3.500	3.196	2.336	1.012	727	3.971	3.985	2.449	2.944
Nachingwea	4.283	4.692	6.848	2.650	6.020	3.403	6.060	5.382	11.458	6.890	5.746	4.813	6.296
Ruangwa	4.475	3.781	4.458	2.347	5.560	3.907	4.292	3.947	5.056	8.440	5.683	1.438	3.030
Liwale	2.853	4.669	6.081	2.469	2.713	3.769	1.889	3.578	5.300	3.558	3.784	6.709	7.171
Kilwa	500	361	487	320	1.059	638	255	966	138	694	2.012	418	1.066
<i>Lindi</i>	<i>14.737</i>	<i>17.652</i>	<i>21.973</i>	<i>11.876</i>	<i>18.852</i>	<i>14.912</i>	<i>14.931</i>	<i>15.385</i>	<i>22.879</i>	<i>23.834</i>	<i>21.588</i>	<i>15.867</i>	<i>21.959</i>
Mkuranga	2.677	2.206	6.026	8.571	5.992	10.319	6.947	10.121	5.290	2.952	1.395	2.791	6.429
Kibaha	269	1.702	341	899	143	72	160	50	104	251	348	42	391
Bagamoyo	212	135	2.013	698	51	224	-	33	10	542	63		81
Rufiji	749	980	2.013	1.307	2.774	1.283	2.513	3.292	1.157	934	1.184	1.190	2.103
Kisarawe	327	715	3.380	888	623	240	531	233	24	976	254		-
Mafia	147	172	31	-	57	34	412	101	39	103	15		4
<i>Coast</i>	<i>4.380</i>	<i>5.910</i>	<i>13.804</i>	<i>12.363</i>	<i>9.640</i>	<i>12.172</i>	<i>10.563</i>	<i>13.829</i>	<i>6.623</i>	<i>5.758</i>	<i>3.259</i>	<i>4.022</i>	<i>9.008</i>
Muheza	620	178	156	1.079	270	40	28	-	10	-	56		-
Pangani	193	206	629	1.034	348	33	625	288	20	272	48	45	-
Tanga	122	187	325	468	224	582	-	-	-	100		394	-
Korogwe	22	-	44	241	-	17	-	-	-	23	68	45	-
Mkinga										887	404	1.491	-
<i>Tanga</i>	<i>957</i>	<i>571</i>	<i>1.153</i>	<i>2.822</i>	<i>842</i>	<i>973</i>	<i>652</i>	<i>288</i>	<i>30</i>	<i>1.282</i>	<i>575</i>	<i>1.975</i>	<i>257</i>

Table 3A4 Continued

District	1998/99	1999/2000	2000/01	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07	2007/08	2008/09	2009/10	2010/2011
Kinondoni	-	-	-	-	35	-	-	-	-	-	-	-	-
Temeke	9.026	3.952	2.414	1.833	1.703	1.778	1.455	968	1.523	3.159	479	152	-
Ilala	-	-	-	24	25	-	30	119	554	180	64	22	-
<i>Dar es Salaam</i>	<i>9.026</i>	<i>3.952</i>	<i>2.414</i>	<i>1.857</i>	<i>1.763</i>	<i>1.778</i>	<i>1.485</i>	<i>1.086</i>	<i>2.077</i>	<i>3.339</i>	<i>543</i>	<i>174</i>	-
Tunduru	9.414	13.067	18.238	6.873	4.680	6.394	5.471	3.969	6.658	2.622	2.620	3.380	3.997
Songea	-	120	1.070	-	-	-	-	-	-	-	-	-	-
Mbinga	-	-	18	-	-	-	-	-	-	-	-	23	-
Namtumbo	-	-	-	-	-	-	-	-	-	66	87	76	89
<i>Ruvuma</i>	<i>9.414</i>	<i>13.187</i>	<i>19.326</i>	<i>6.873</i>	<i>4.680</i>	<i>6.394</i>	<i>5.471</i>	<i>3.969</i>	<i>6.658</i>	<i>2.688</i>	<i>2.707</i>	<i>3.478</i>	<i>4.085</i>
Ludewa			108	50		180	-	-	-		-	20	
Kyela			58	207	485		300	250	300		-		
Kilosa				17			50	17			-		
<i>Other</i>	<i>717</i>		<i>166</i>	<i>274</i>	<i>485</i>	<i>180</i>	<i>350</i>	<i>267</i>	<i>300</i>		-	<i>20</i>	
<i>Grand Total</i>	<i>106.442</i>	<i>121.207</i>	<i>122.290</i>	<i>67.369</i>	<i>92.153</i>	<i>78.567</i>	<i>71.918</i>	<i>77.446</i>	<i>92.573</i>	<i>99.107</i>	<i>79.069</i>	<i>75.367</i>	<i>119.180</i>

Source: Cashewnut Board of Tanzania

Table 3A5 Vietnam: Cashew production by districts in Binh Phuoc region 2004-2009 (tonnes)

District name	2004	2005	2006	2007	2008	2009
Thị xã Đồng Xoài	2,599	3,259	3,935	4,656	4,242	2,936
Huyện Đồng Phú	11,000	10,762	10,162	15,173	15,505	16,135
Huyện Phước Long	44,770	48,892	48,578	76,897	71,553	66,823
Huyện Lộc Ninh	2,080	3,570	3,231	3,907	4,398	4,261
Huyện Bù Đốp	728	952	1,500	3,795	3,494	2,871
Huyện Bù Đăng	30,180	38,269	34,363	40,696	42,510	30,245
Huyện Bình Long	4,982	7,489	6,207	8,574	10,455	9,576
Huyện Chơn Thành	1,791	1,792	2,075	2,679	1,920	1,698
Total	98,130	114,985	110,051	156,377	154,077	134,545

Table 4A1 Sampled households from each district, ward, village and hamlet

Tandahimba														Bu Gia Map																					
177														199																					
Mdimba							Nanhyanga							Dak O					Phu Ngia																
89							88							100					99																
Mambamba				Tukuru			Nanhyanga A				Nanhyanga C			Thon 6			Dak Lim		Duc Lap			Khac Khoang													
45				44			49				39			50			50		49			50													
Bonden	Chihanga	Majengo	Mnekachi	Bonden	Kagera	Karume	Kawawa	Mhaida	Trankini	Bandarini	Kivanjani	Mimbeni	Mungano	Shuleni	Sokoni	Dodoma	Kibaha	Madina	Mlingano	Mpakani	Pemba	Doi 1	Doi 2	Doi 3	Doi 1	Doi 2	Doi 3	Khu Cho	Doi 1	Doi 2	Doi 3	Doi 4	Doi 1	Doi 2	Doi 3
12	10	13	10	7	8	7	8	7	7	11	8	10	7	8	5	3	3	8	11	7	7	16	15	19	18	14	14	4	22	10	10	7	11	21	18

Source: Household survey.

Table 4A2 Ratios of density, output per tree and yield by Tanzania and Vietnam

Farmer Type	Density (t/H)	Output/tree (O/T)	Yield (P/H)
Small	6,4	1,8	12,0
Medium	6,9	0,9	6,0
Large	6,0	1,4	8,2

Source: Household survey

Table 4A3 Workers used for producing cashew in Tanzania and Vietnam

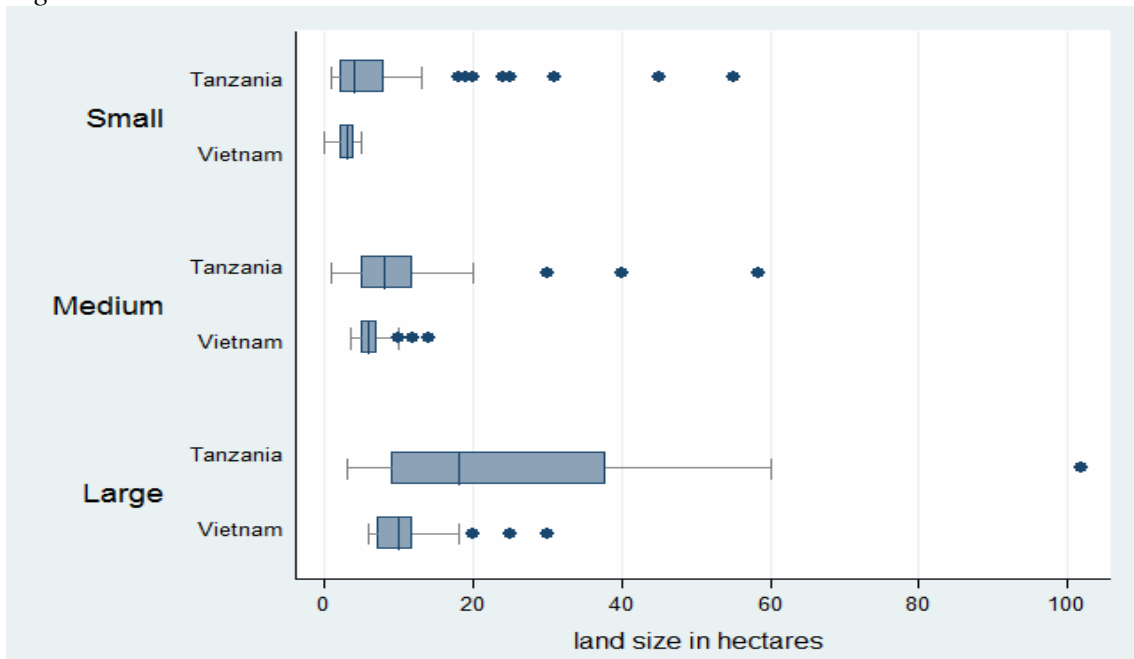
Variables	Tanzania		Vietnam	
	Small	Large	Small	Large
Farm workers	8	17	5	10
Farm workers from household	3	3	2	3
<i>Workers</i>				
Spraying sulphur	1	1	2	3
Pruning	2	5	2	3
Sanitation	2	5	2	3
Cleaning	5	11	2	4
Weeding	7	14	3	4
Picking of cashew	5	10	4	9
Drying	3	5	1	1
Grading	2	4	0	0
<i>Maintenance per season (frequency)</i>				
Pruning	1	1	1	1
Wedding	2	2	2	2
Fertilizer application	0	0	1	1
Sulphur spraying	4	5	1	2
Extension service	0	0	0	0

Source: Household survey.

Table 4A4 From seed to cashew as a tree crop

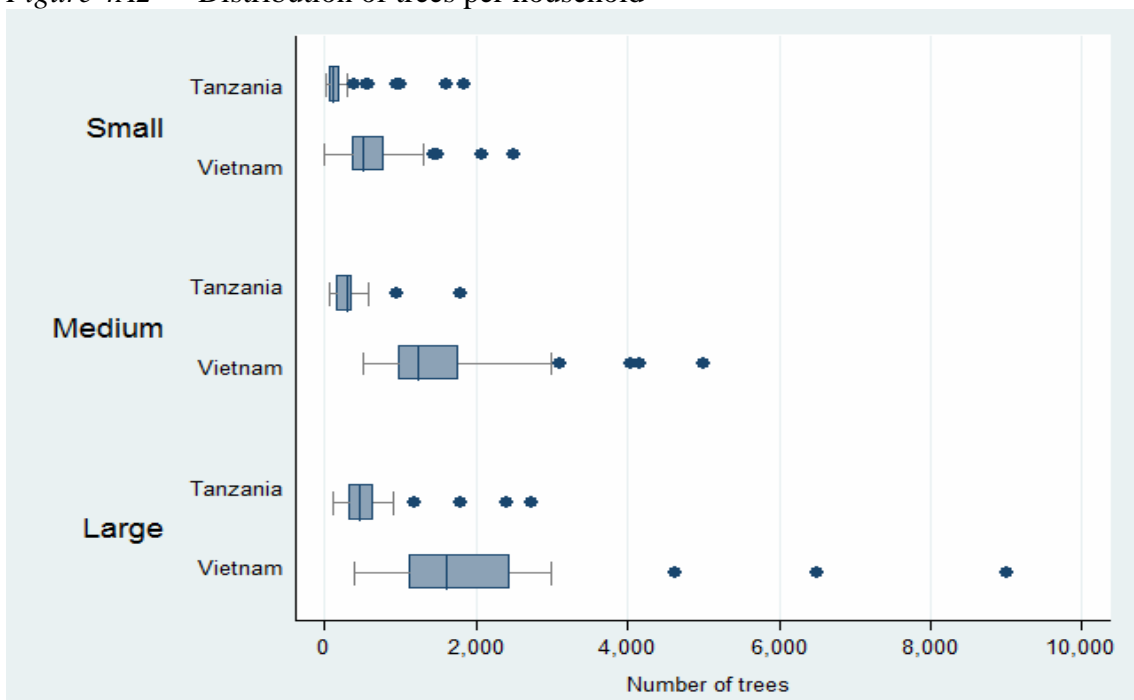
1	Seed selection (from high yielding trees)				Couple of days
	(sun dry then seeds 2 to 3 days then soak them for 48 hours)				
2	Sowing	Season Planting	Raising seedlings in nursery	Layering (ground or air)	
	Germination				1 month
	Selection of stronger seeds to stay				1 month
	Propagation/Grafting, where seeds are taken into orchard to allow the main root NOT to bent				3rd to 4th months
3	Regular watering and weeding young seedlings also protection from sunlight and provision of stand of stability				1 to 3 years
4	From 2nd year manure is twice applied on increasing doses annually				
5	Yields can come on the 3 to fifth year and stabilised after the 7th year				

Figure 4A1 Land distribution in hectares



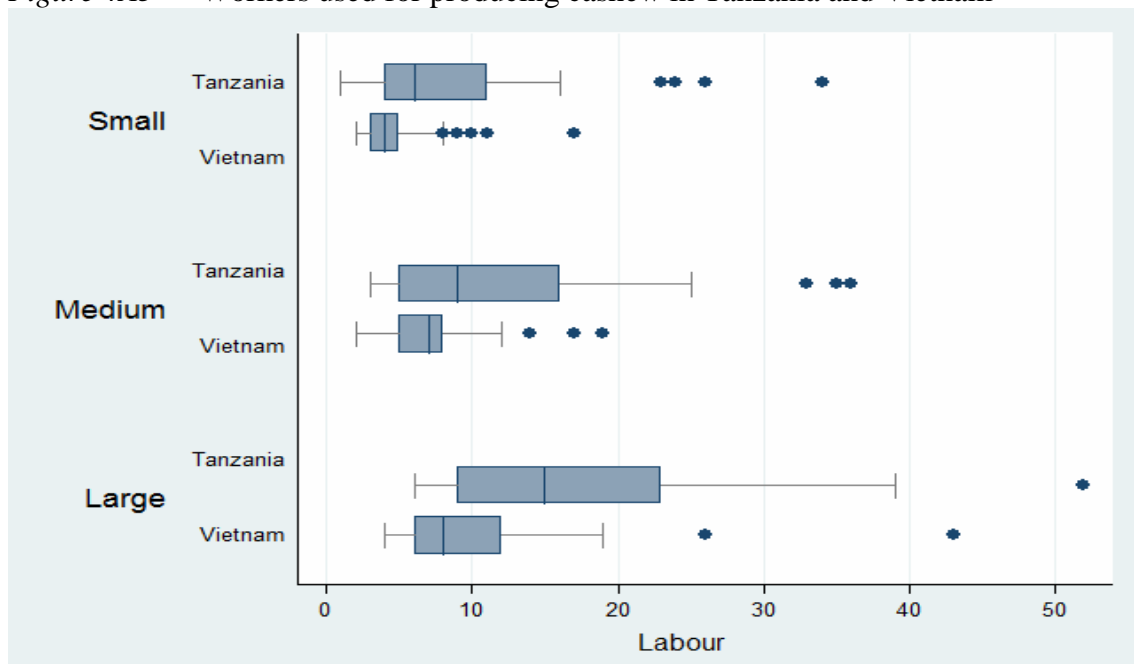
Source: Household survey.

Figure 4A2 Distribution of trees per household



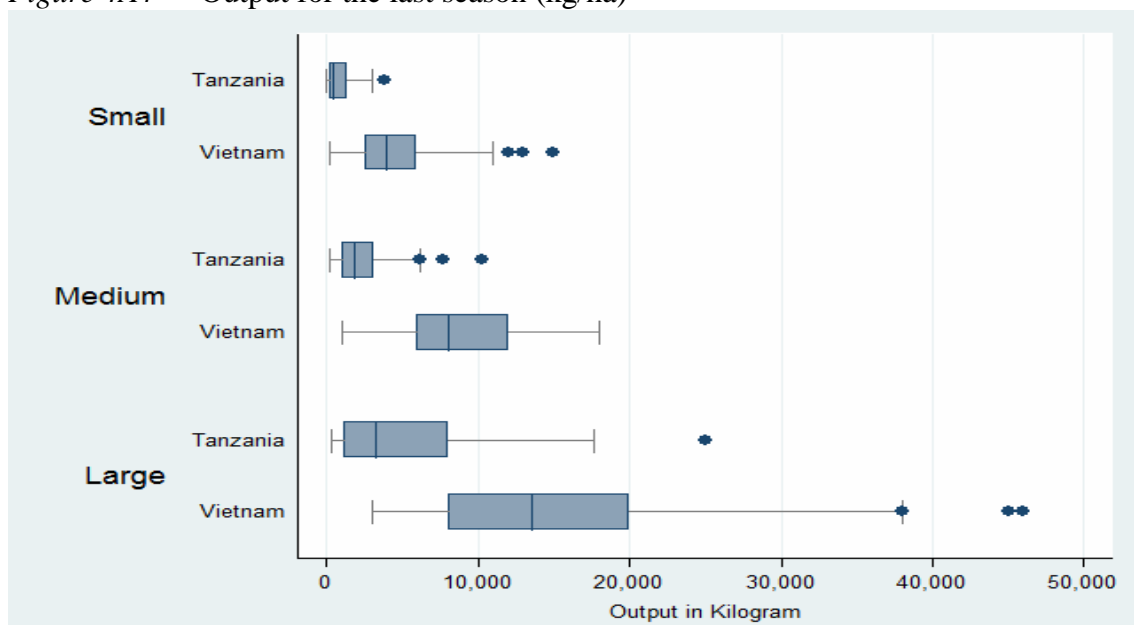
Source: Household survey.

Figure 4A3 Workers used for producing cashew in Tanzania and Vietnam



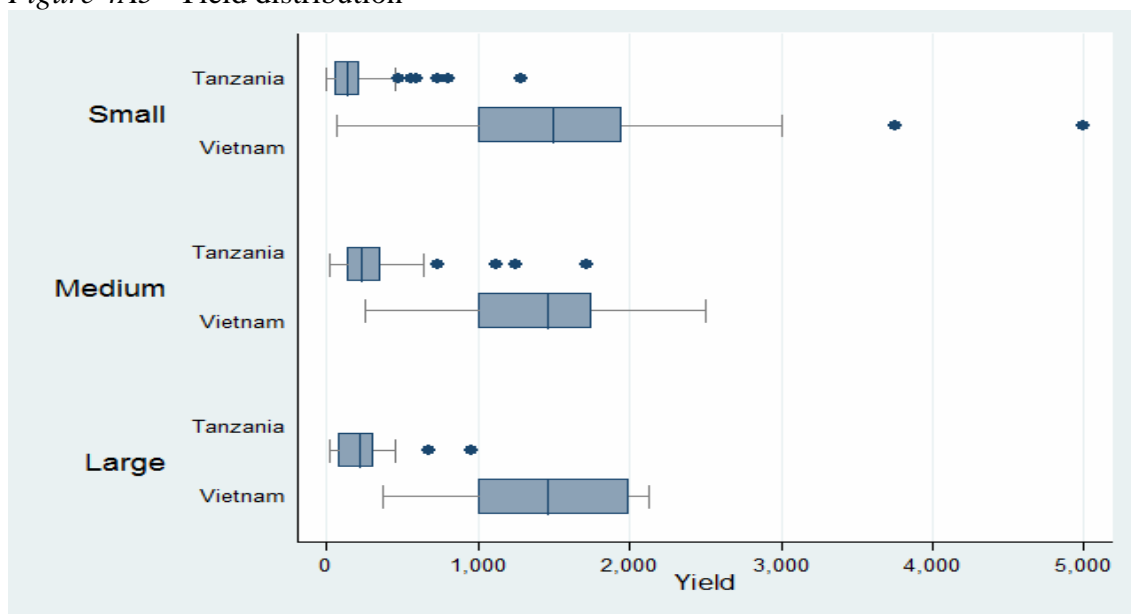
Source: Household survey.

Figure 4A4 Output for the last season (kg/ha)



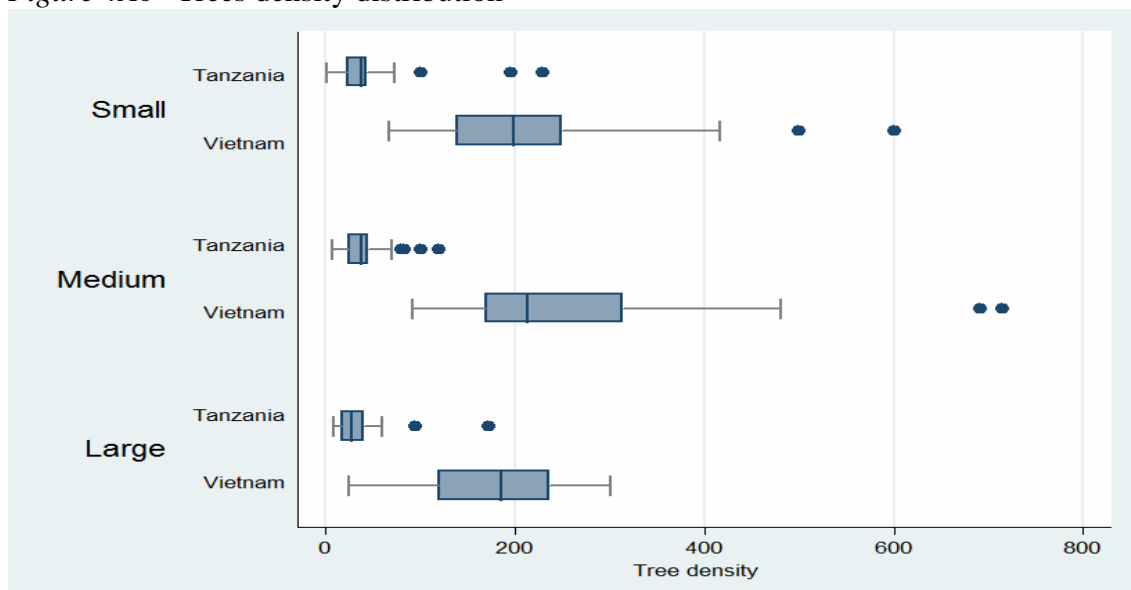
Source: Household survey.

Figure 4A5 Yield distribution



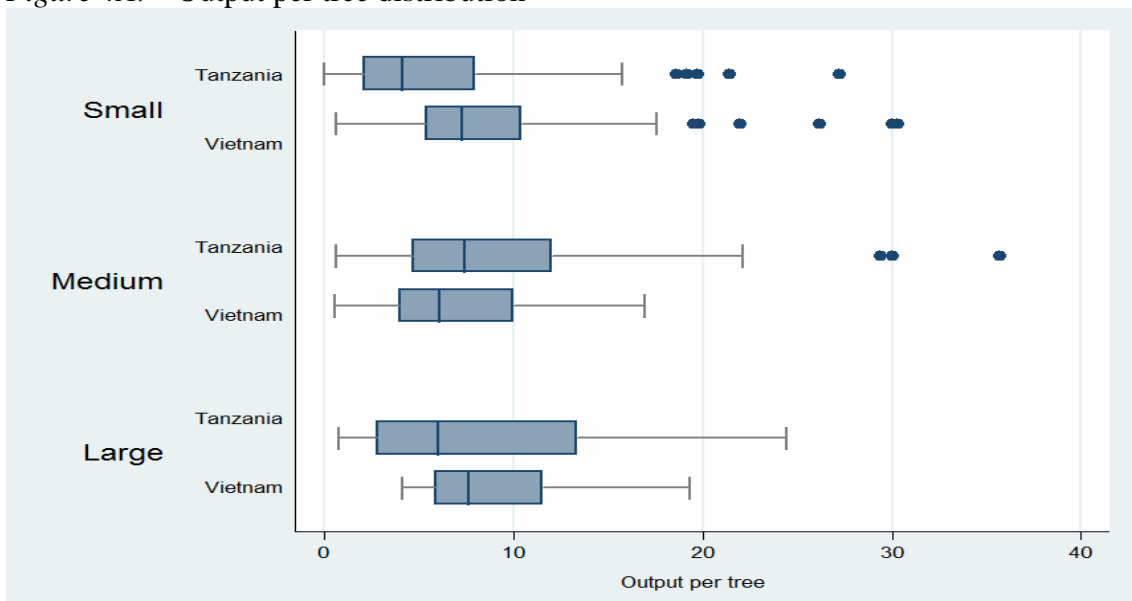
Source: Household survey.

Figure 4A6 Trees density distribution



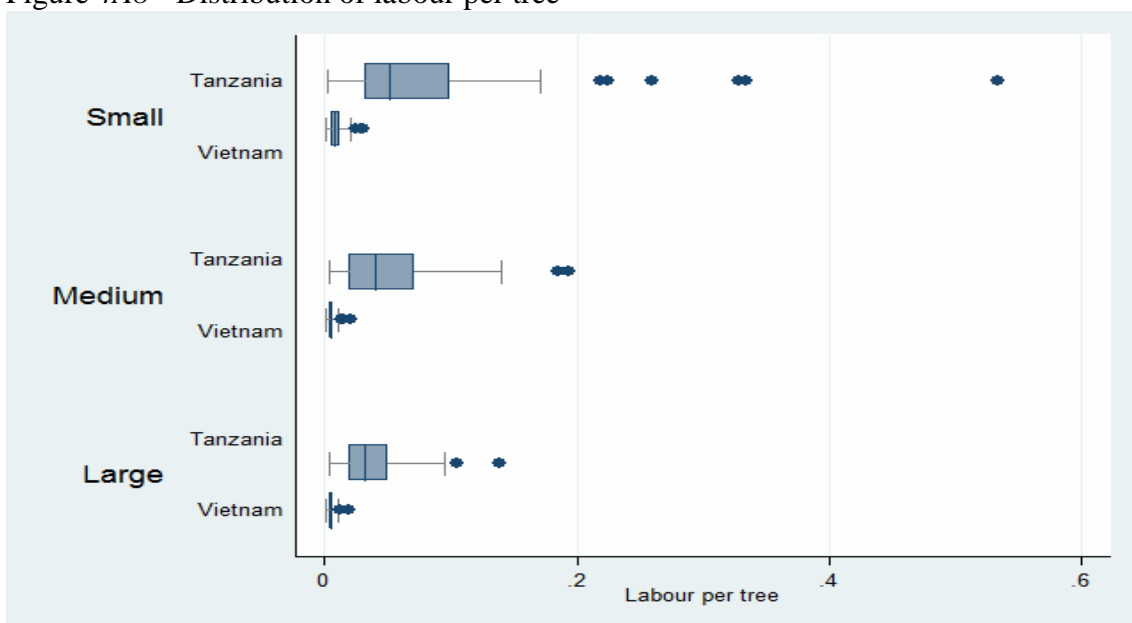
Source: Household survey.

Figure 4A7 Output per tree distribution



Source: Household survey.

Figure 4A8 Distribution of labour per tree



Source: Household survey.

Table 5A1 Prices of raw cashew in Tanzania 2006/2007-2010/2011 (TSh)

	Indicative Price	Market price		FOB price	Marketing
		Low	high		
2006/07	600				Free market
2007/08	610	750	1100	872	WRS
2008/09*	675	700	990	925	WRS
2009/10	700	900	1428	950	WRS
2010/11	800	1501	2182	100	WRS

* World financial crisis

Source: Cashewnut Board of Tanzania, 2010

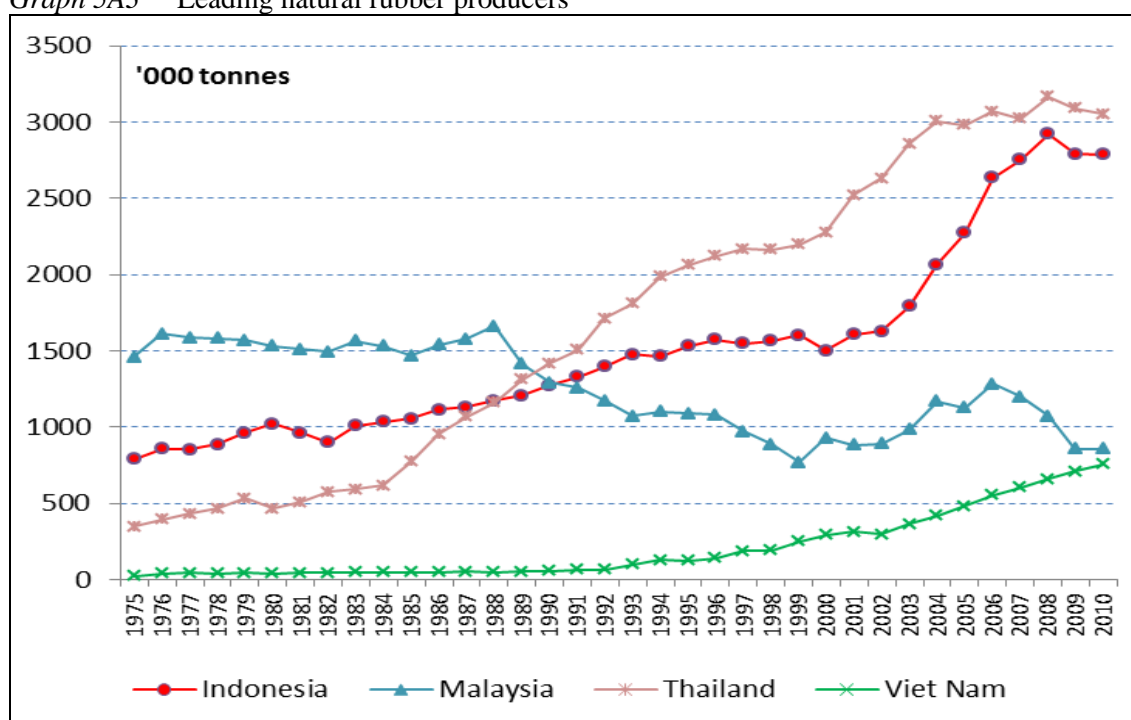
Table 5A2 List of key informants' interviews conducted

<i>Name</i>	<i>Organization</i>
Dr. Shamte H Shomari	NARI
Dr. Mark Sijaona	NARI
Dr Louis Kasuga	NARI
Dr. Peter Massawe	NARI
Mushtak Fazal	Premier Cashew Industries
Juma A. Shitta	Integrated Foods and Pharmaceuticals Ltd
Dr. John Shao	Researcher
Dr. Brian Cooksey	Researcher
Mr Majogo	Crop Officer Tandahimba
Clarence Kunjumu	Regional Cooperative Officer
Shabani Y Simuli	CBT - Quality Control Manager
(The Late) Benno Mhagama	CBT - Director General
Mr Mohamed Hanga	CBT - Director of Marketing and Information Services
Yasin	Micronix Likongwe- Warehouse Operator
J R Mmuko	SMS Subject Mater Specialist- Cashew – Mtwara Rural District
John B Henjewelle	DCO – Mtwara Rural District
Munjai	DCO – Tandahimba
Gervas J Mahanga	Tandahimba
Isabella Dismas	DALDO – Tandahimba
Jikwamue Group	Nursery- Malopokelo- Tandahimba
Mustafa Chiwile	Tandahimba AMCU-Primary Society
Yahya Salum Mahinyo	CDC Nanhyanga
Hassan Dadi Chipyangoo	Cooperative Society Manager- TANECU
Mashaka Mfaume	DALDO- Masasi
Augustine Tenge	Ag DED Newala
R Mmunda	DCO Newala
Shweth Rai	OLAM- Mtwara
Mustafa Matata	BUCO-Masasi
Hon. Diwani	KIMWODEA
Tweta Issa Mandanda	VEO- Mnyoma
Mr Vu Ngoc Nguyen	Binh Phuoc
Mr Giang Hoang Dang	VINACAS General Secretary
Mr Nguyen Thai Hoc	Donafoods Director
Mr Vu Duc Bo	Tien Hung Cashew Sustainable Development Group
Nguyen Thi Tho -	Owner- Doanh Nghiep Tu Nhan Minh Tho- Dak O
Luong Thi Hoai-	Cashew Trader Thuong Hoai- Dak O
Mr Hiep	AMYCO Owner – Long An
Mrs My Le	MY LE – Owner – Binh Phuoc
Ms	HAMYCO – Manager – Binh Phuoc
Nguyen Thanh Binh	VINAFIMEX Binh Phuoc
Nguyen Van Chieu	LAFOOCO Long An www.lafooco.vn/
Abdulkarim Ngarama	Branch Manager of OLAM
Tuntufye Mwambusi	Former worker OLAM

Photo 1A Some of the facilities visited

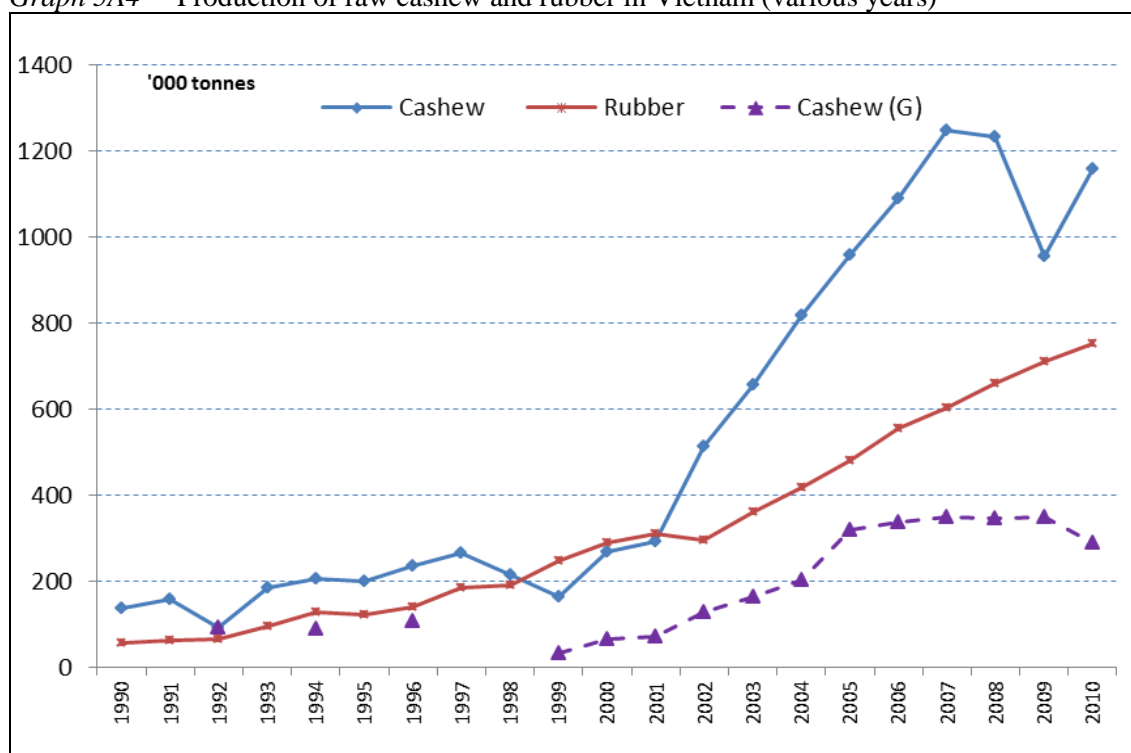


Graph 5A3 Leading natural rubber producers

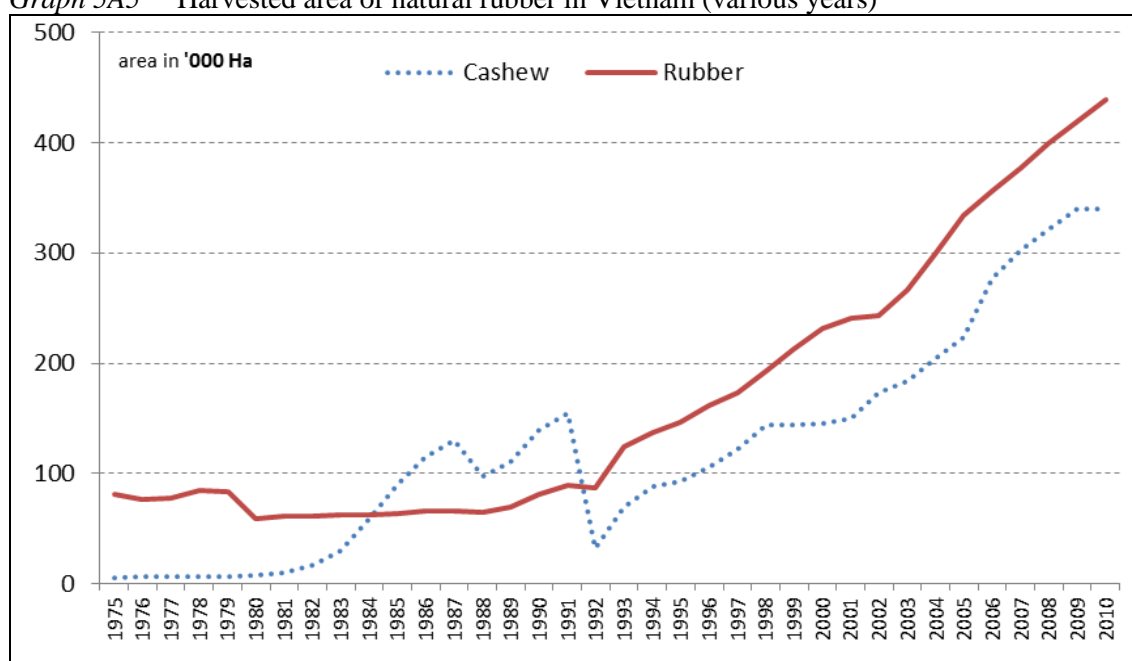


Source: FAOSTAT | © FAO Statistics Division 2012 | 14 April 2012

Graph 5A4 Production of raw cashew and rubber in Vietnam (various years)



Source: FAOSTAT | © FAO Statistics Division 2012 | 14 April 2012 production output for Vietnam; cashew (G) uses data from Vietnam Cashew Association (1990 to 2006) and General Statistics Office of Vietnam GSO (2007 to 2011)

Graph 5A5 Harvested area of natural rubber in Vietnam (various years)

Source: FAOSTAT | © FAO Statistics Division 2012 | 14 April 2012

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