

Liberalisation, Gender and Livelihoods: The Mozambique Cashew Nut Case

Summary report

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Abbreviations and acronyms

ADPP	Assistance to Development for the People by the People
ADRA	Adventist Development and Relief Agency
AMODER	Mozambican Association for Rural Development
CNSL	Cashew Nut Shell Liquid
IIED	International Institute for Environment and Development
IMF	International Monetary Fund
INCAJU	Institute for the Promotion of Cashew
INVAPE	Investments in Agriculture and Animal Husbandry
MADER	Ministry of Agriculture and Rural Development
NGO	Non-Governmental Organisation
PROAGRI	National Programme for Agricultural Development
SNV	Netherlands Development Organisation
UEM	Eduardo Mondlane University
USAID	United States Agency for International Development

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Executive Summary

Cashew makes an important contribution to rural livelihoods in Mozambique, as an income source, a source of nutrition and a source of employment. About 95% of all cashew is currently produced by smallholder farmers and there is only a handful of commercial farms. Around one million rural households (40% of the population) have access to cashew trees and cashew is often processed at home as well as in factories. It offers particular value to women, who are active in producing, processing and marketing cashew throughout the country. For these reasons, enhancing the productivity and profitability of the cashew sector could be a key strategy for poverty reduction in Mozambique and would also increase the country's export earnings. But the success of such a strategy depends on the extent to which women can engage with and benefit from the sector.

Mozambique used to be one of the world's biggest producers of raw cashew nuts and exporters of processed kernels. But since the mid-1970s various problems have meant that production and quality have dwindled, with rapid liberalisation in the 1990s resulting in the collapse of the processing sector. Mozambique is now a small world player, competition has increased and countries like India, Brazil and Vietnam dominate the world market.

Drawing on fieldwork conducted in Mozambique between 2002 and 2004, this study explores how improvements in three main areas (cultivation, processing, marketing and trade) could enhance cashew's role in reducing poverty and promoting gender equality.

Women's greater control of cashew trees – and better access to extension services to raise the productivity of the trees – will be important in two key ways. Firstly it would increase women's cash income (through selling or bartering nuts, juice and alcohol), and secondly it would improve the food security and welfare of their families, particularly as women tend to allocate a bigger share of their income than men to basic needs. Increased income-earning opportunities for women in small-scale factories, home processing and marketing will also help to reduce poverty and are a particularly critical source of income for poor female-headed households. Involving women more in interventions to promote cashew production will tend to increase the total number of farmers involved and the total productivity of the sector, which in turn will increase its contribution to the national economy.

Cashew could earn more income for the country if quality and processing were improved. Value added could be captured by increasing the final processing of cashew nuts within Mozambique, which implies roasting, salting (adding other flavouring) and packaging; at present large profits are made by the companies which do the final stages of processing (and retailing) in Europe and the United States. And targeting international niche markets, such as the fair trade sector, could be another way forward. There is also scope for enhanced local and regional trade in cashew – the informal trade which already exists in domestic and regional markets needs to be stimulated without stifling its development with over-regulation. But to capture these benefits, farmers, especially women farmers, need to build their skills to become informed about market prices, improve their negotiating power and strengthen the marketing organisation of raw cashew nuts.

1. Introduction

This report summarises the results of a two-year study carried out by the Eduardo Mondlane University in collaboration with the International Institute for Environment and Development (IIED). The project is part of an IIED research programme called “Liberalisation, Gender and Livelihoods: The Cashew Nut Case” and includes studies in Mozambique and India. In Mozambique, research was carried out in two provinces, Nampula in the north (2002), which contributes about 80% of overall cashew production, and Gaza in the south (2003) (Figure 1).



Figure 1. Provinces in Mozambique

(source: www.mae.gov.mz)

The main objectives of the project were to:

- Explore the impact of liberalisation and other national and international policies on the production, processing and commercialisation of cashew, and discover what these changes mean for women and men.
- Identify opportunities to enhance the contribution of the cashew sector to poverty reduction and gender equality.
- Inform policy makers at provincial, national and international levels (making micro-meso-macro links) of our findings and recommendations.

The cashew sector in Mozambique has been fraught with difficulties since the 1970s, when Mozambique was one of the lead world producers of raw nuts and exporters of processed kernels. The sector has been the subject of extensive research, particularly since the controversial liberalisation process of the 1990s. However, most studies have taken an economic perspective, with less emphasis on institutional and social factors. This study attempts a more integrated analysis and includes a specific focus on gender. Women are active in producing, processing and marketing

cashew. Differences and inequalities between women and men affect, and are affected by, policy reform so a gendered analysis is important if we want policies to be constructive and benefit both women and men.

The methods included:

- Formation of a national reference group with stakeholders from government, the private sector, NGOs, researchers and donors.
- Interviews with key informants at local, provincial (Nampula and Gaza) and national levels.
- Questionnaire survey of workers and ex-workers from processing factories in Gaza province: Macuacua, Manjacaze district; and in Nampula province: Namige, Mogincual district, Geba, Memba district and Angoche, Angoche district.
- Questionnaire survey of women producers at household level in Manjacaze, Gaza and Namige, Nampula.
- Semi-structured interviews, case studies and participant observation of male and female traders in Macia, Gaza province.
- Semi-structured interviews and/or focus group discussions with community leaders, associations, women producers in Manjacaze and Namige; with male and female factory workers in Geba, Angoche and Namige and with women processors in Maputo. Participant observation in the Invape factory, Macuacua.

2. A brief history of the cashew sector

Mozambicans have grown cashew trees on sandy coastal soils since the 19th century and earlier in some parts of the country. Nuts have been exported since the beginning of the 20th century, and when World War II closed shipping to India, a local processing industry was born. After the war, numerous factories were built for processing the nuts for export. They used impact shelling technology and women provided most of the labour. Production peaked in 1972 when 216,000 tonnes were marketed and Mozambique was the world's leading exporter.

After independence in 1975, such levels of production could not be sustained for many reasons, including war and displacement; inconsistent state policies; low farm prices; weakened trade networks; shortages of tools, consumer goods and food; severe droughts; old trees (60-70% more than 25 years old); diseases such as powdery mildew (*Oidium anacardium*) and anthracnose; pests such as helopeltis; and uncontrolled bush fires.

About 95% of all cashew is currently produced by smallholder farmers and there is only a handful of commercial farms. About one million rural households (40% of the population) have access to cashew trees and cashew is often processed at home as well as in factories. The old large-scale factories required large stocks of raw cashew and impact-shelling by machine tended to break many kernels. Whole nuts are worth more than halves or broken nuts on the international market. About 10,000 workers were employed in the factories before they were privatised and the sector liberalised. Most government factories were sold to private buyers in 1994 and most owners began to rehabilitate the factories and change the technology to semi-mechanised shelling, which is labour intensive but results in fewer kernels getting broken.

In 1995, the Mozambican government liberalised the cashew sector to meet a condition of the World Bank to obtain further loans. The Bank's rationale was as follows:

1. Reducing export tariffs on raw nuts would boost demand and spur competition among exporters.
2. Eliminating trader licenses would increase the number of traders.
3. Traders would compete for raw nuts and pay higher prices to smallholders.
4. Higher prices paid to smallholders would increase their incentive to market nuts and further increase farm income.
- 5 The price incentive would encourage more farmers to grow cashew and encourage existing farmers to improve tree management and plant new trees.

The risk that lowering export tariffs on raw nuts might cause the Mozambican cashew processing industry to fail was accepted; the loss of jobs in the processing sector would be offset by the anticipated gains to a much larger group of smallholder farmers. By 1997, most factories had closed. Public protest and intense government debates led to raising export tariffs in 1999, but most factories have not re-opened.

There is considerable evidence that the World Bank strategy did not work. Although prices did increase, the increases were small. Prices of food and basic consumer goods also increased, traders

tended to benefit more than farmers, and farmers who could afford to store nuts until later in the marketing season benefited more than others. Contrary to expectations, farmers did not plant many new trees. In conclusion, net gains to farmers were disappointingly low and largely offset by the cost of unemployment caused by the collapse of the processing sector.

By 1998 INCAJU, the government institute for the promotion of cashew, began to develop a comprehensive and integrated strategy to revive the sector and stimulate activities in the three inter-linked areas of production, processing and commercialisation. The strategy is based on co-operation between the private sector, government, NGOs and communities. Public investment has been made in buying and subsidising fungicides and pesticides to treat cashew trees and in promoting processing plants by providing guarantees for loans to entrepreneurs. Some research, extension and monitoring has also been carried out, usually collaborative efforts between government, business and NGOs.

The past five years have seen slow improvements. Production has varied between 40,000 and 60,000 tonnes since 1997-98. It increased from 51,000 tonnes in 2001/02 to 63,000 tonnes in 2002/03, well below the government target of 79,400 tonnes for that season (IMF Country Report, 2003). Only about 3,000 tonnes were processed in the country in 2002/03. Processing initiatives provide only about 2,000 jobs, compared to 10,000 before liberalisation. These are disappointing figures but they may well not capture the full extent of production or processing, particularly in the south, because both marketing and processing is more informal since liberalisation and there are many small, unregistered processing initiatives for domestic and regional markets.

3. The international context

Today India, Brazil and Vietnam are the world's largest producers of raw cashew nuts. India is the largest importer of raw nuts, importing most of Mozambique's marketed production, and is the largest exporter of processed cashew nuts. There is a growing market for cashew nuts (kernels) in Europe and the US, with new markets opening up elsewhere, such as Russia and Japan. Many international development agencies are encouraging poor countries to increase their 'high value' agricultural exports as a way of promoting economic growth and reducing poverty. Unlike many other agricultural products, there are no import tariffs for cashew nuts in Europe and the US and the cashew industry does not have to tackle protectionist policies or subsidies in the North.

While there is potential to increase profitable exports, there are also a number of several constraining factors. As more countries, such as Vietnam, successfully increase production, supply increases and prices fall. The world price of a metric tonne of raw cashew was US\$700 in 1999, but fell to US\$411 in 2000/01. The price of kernels declined from \$3.15 per lb in 1999 to \$1.6 per lb in 2002. Buyers are also increasingly demanding that exporters meet quality standards, which has been particularly difficult in Mozambique where – the quality in general is not high (compared for example to with India, for example) and the capacity to monitor quality along the supply chain is variable. In addition, there is increasing concentration in the power exercised by buyers in global agricultural markets. In general, international trade in labour-intensive products (produced largely by developing countries) is organised by a few global buyers who may work for, or act on behalf of, major retailers or brand name companies. Mozambique is largely dependent on buyers of raw cashew nuts in India, who in turn have to negotiate with buyers in the US and Europe. This competition exerts a downward pressure on prices and indeed wages; countries, businesses, farmers and workers have very different levels of power to influence the benefits they receive.

The next sections summarise the study's findings and recommendations. Production, processing and marketing will be covered separately, but coordination between these elements is essential and will be discussed at the end.

4. Study findings: cultivating cashew

Background

Cashew is an important crop in Mozambique – it contributes significantly to the livelihoods of farmers and to the economy in the following ways:

- The sale of raw cashew nuts and kernels provides an important source of cash income for smallholders.
- Cashew kernels are a nutritious food source for families.
- The vitamin-rich false fruit is also consumed and processed into juice and alcohol, which can be consumed, used to generate cash income or be exchanged for labour at community level.
- Cashew nuts are (still) an important export crop for the country.
- Processing cashew within Mozambique not only adds value to the crop in terms of higher export prices (for kernels rather than raw cashew), but also provides valuable employment opportunities, particularly for women, who have fewer options than men.

However, our findings show that much could be done to enhance production.

Finding 1: Women have considerable access to and control over cashew trees

In Nampula province, society is predominantly matrilineal (descent or kinship through the female line) whereas in Gaza it is predominantly patrilineal (descent or kinship through the male line). We found that women in Nampula were more secure in their rights to land and trees, since most inherited or were allocated land (many from their mothers). Husbands often move to live in their wives' areas of residence (Box 1).



Cashew tree

Woman pruning branches



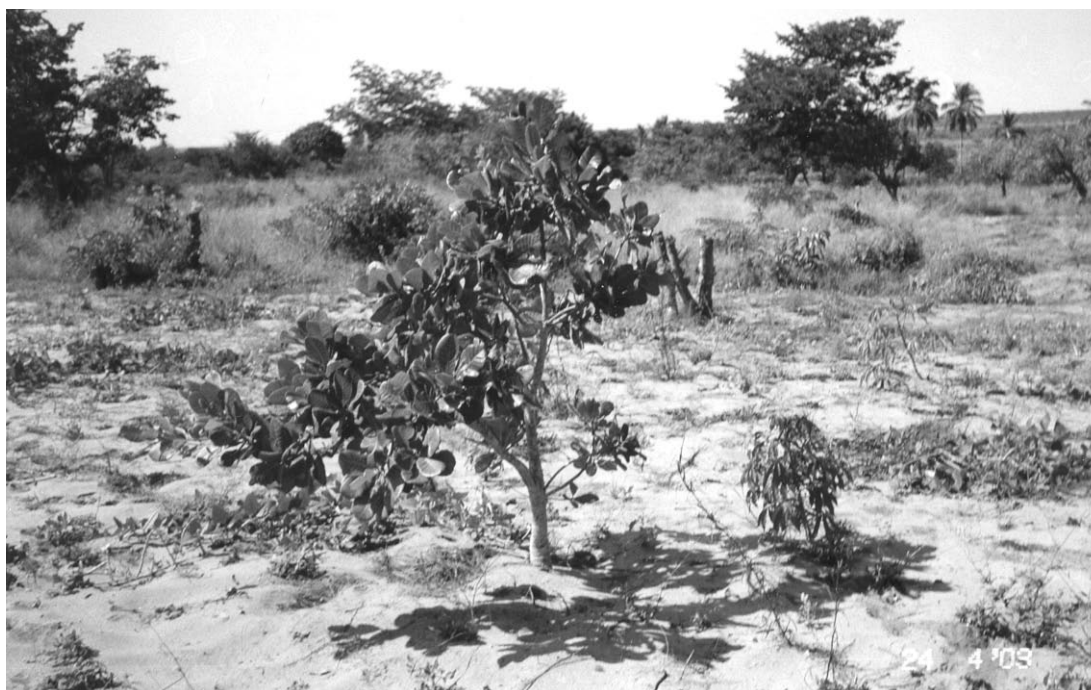
Box 1. Women's land rights in Namige, Nampula province

Most women, in our sample of 45, inherited or were allocated pieces of land from their own families. This gives women important basic security. We also found that women tended to marry more than once and are extremely mobile in their marriage arrangements. In this context, their land provides women with a constant and important source of security. However, some situations can endanger this security: firstly, when women move to their husbands' village after marriage, and secondly, when land is sub-divided and more powerful actors (local leaders, companies) buy it or simply take it over. A land market is also developing; 22% of our respondents said that their land had been 'bought' (although in law land belongs to the state and cannot be bought or sold); 13% said this sold land had belonged jointly to husband and wife, while 9% said the land was their husbands'. So-called 'traditional' patterns are in fact dynamic and changing; one woman told us: *"I don't know who the plot belongs to as we (husband and wife) bought it together"*, while another said her husband had contributed money but the land was hers!

Even in Gaza, about two-thirds of women interviewed said they had obtained land from their husbands or parents-in-law. In both provinces, women said that they owned trees and planted cashew trees themselves, although they tended to plant trees when they lived with their husbands (in marital homes) or in their parents' homesteads, rather than when they lived with their husbands' families. Rights to land and trees are complex and changing. While in general women tend to have more restricted user rights in patrilineal settings, previous cashew studies have underestimated the extent to which women plant trees in these systems, as Box 2 illustrates.

Box 2. Dona Rosita's cashew trees (Gaza province)

Dona Rosita is 32 and was born in Ncuna village in Mamitelane. Before she married at 16 she planted about 10 cashew trees. She says she would have planted more, but there were plenty of trees, some of which were planted by her mother and father. She married a man in the same village and went to live with him and his parents. She did not plant trees there because she "did not feel at home", but she looked after the existing cashew trees. After 10 years of marriage, her husband died and their two children had also died. When her husband died, her mother-in-law gave her a plot of land which had cashew trees on it. She eventually met her second husband and moved to another village, Chochomaio, also in Mamitelane. When we interviewed her she had been living there for five years, in a separate homestead from her parents-in-law. She reported planting about 20 cashew trees there because she is not in her in-laws' house and because she knows her husband loves her and will not leave her. Her father died a year before she was interviewed and he left her some land with cashew trees.



Young cashew tree amongst cassava

Finding 2: The gender division of labour is less rigid than for other agricultural work

Although women tend to spend more time cultivating cashew than men, both share the tasks of clearing, sowing or planting, weeding and harvesting. However, women do plant trees and men clear (weed) around the trees. As several women said *“Clearing is a task for everybody as it is a lot of work”*. Men tend to do the pruning of cashew trees in both study provinces. It should be noted that pruning is not as time consuming as other tasks such as clearing and harvesting. Most women in Nampula said that men did it, but in Gaza we found that almost half of our sample of women farmers pruned trees. This may be explained by the fact that half our sample consisted of women headed households.

Gaza women gave various explanations for leaving the pruning to men:

“I no longer have the strength to cut branches”

“Pruning is not just about cutting branches – you have to know which to cut – and my husband knows exactly which branches can be cut”

“I cut some branches once, but I did not do it well. When people leaned against the tree, they hurt themselves”

“Men more often offer to prune the trees – more often than other types of work”.

In the south, men tended to see harvesting nuts as women’s work although 12 of the 40 women interviewed did say that men do get involved. In a conversation with one group of men, their attitude emerged clearly:

“Can you imagine what it is to see a man bending this way and that to pick up nuts. Much better to spend your time on other things.”

Finding 3: The local use of cashew is important for livelihoods

The extensive use of cashew by smallholder farmers is impressive. Cashew nuts are processed at home and used in cooking. The false fruit is also eaten fresh and processed to make juice and alcoholic drinks. Women mainly do the processing, although sometimes the children and men help. All these products may be sold locally or used to strengthen social relations at community level, in festivities or for paying farm workers. Cashew trees are also used for building and for traditional health treatments.

In the south, declining levels of peanut production mean that cashew is increasingly used for food. With the reduction of remittances from South Africa and the loss of employment in cashew factories, cashew is also an important source of cash. The drought in 2002/03 meant that other crops failed or produced little, giving cashew even greater importance for household food security. Table 1 shows the changing importance of cashew relative to other livelihood sources in Macuacua, Gaza province. However, in both Nampula and Gaza, farmers said that they used to be able to buy much more from cashew income in the past. The past tended to refer to the 1970s, before the war in the 1980s.

Table 1: Livelihood sources in the present and past, Macuacua, Gaza province

(N=40 women farmers)

Livelihood sources	Present	Past
1. Agriculture	40 (100%)	40 (100%)
2. Sale of raw cashew	17 (43%)	30 (75%)
3. Barter of cashew for basic goods and clothes*	14 (35%)	3 (8%)
4. Sale of cashew-based alcohol (<i>aguardente</i>)	22 (55%)	19 (46%)
5. Barter of <i>aguardente</i> for other goods and labour	14 (35%)	11 (28%)
6. Salary	5 (13%)	11 (28%)
7. Remittances	5 (13%)	21 (53%)
8. Sale of timber for construction	3 (8%)	0
9. Sale of drinks from palm trees/ <i>Utchema</i>	6 (15%)	5 (13%)
10. Carpentry	5 (13%)	7 (18%)
11. Animal husbandry	16 (40%)	14 (35%)
12. Local healers	2 (5%)	2 (5%)
13. Hire/renting out of animal traction	1 (3%)	1 (3%)
14. Milk production	1 (3%)	0
15. Sale of other agricultural products	4 (10%)	0
16. Construction work	1 (3%)	0
17. Fishing	1 (3%)	1 (3%)
18. Sale of drinks from the fruit of the <i>jambalau</i> tree	1 (3%)	1 (3%)
19. Sale of drinks from the fruit of the <i>massala</i> tree	1 (3%)	1 (3%)

* We found that traders were increasingly offering basic goods in exchange for raw nuts. This may be interpreted as taking advantage of the lack of food and basic products in rural areas to increase their profit margins, but it also means that farmers do not have to travel to buy necessities.

Finding 4: Chemical treatments of smallholder cashew trees have had limited success in raising production

Although significant public resources have been invested in subsidising fungicide spraying of cashew trees, such practices have only been taken up by a few smallholder farmers. The latest INCAJU report for 2003 states that only 19,661 families [OUT OF HOW MANY?] in the whole country have been covered by the spraying programme (very approximately 10% of farmers with trees). Hardly any farmers in our sample had sprayed their trees. The complexity of carrying out the treatment correctly and the cost of the treatment to farmers (even though it is subsidised), combined with low literacy and weak extension and communication contribute to the ineffectiveness of the programme. As farmers explained to us, the sale of cashew now buys much less than in the past and this also affects their attitude to investment in the trees.

In addition, all farmers tend to be treated as a homogenous group by extension services, despite having different levels of resources, varying numbers of trees and different land use patterns. To be effective, interventions should be tailored to their specific needs. Fungicide and pesticide spraying is more likely to be adopted by big cashew producers and plantation owners, particularly as multiple treatments have to be repeated on a yearly basis. International experience suggests that there are numerous constraints to making complicated chemical treatments work effectively for small unorganised farmers, quite apart from the detrimental health and environmental effects.



Cashew seedlings in nursery

Finding 5: Smallholder farmers have not bought improved varieties of cashew trees on any scale and the quality of nuts is very variable

During our study we came across nurseries full of seedlings of improved cashew varieties which were not being bought or distributed. In Nampula province in 2002, the price of each seedling was 2,000 Meticaís (Mt) about US\$0.12, but despite the large subsidy (actual cost 12,000Mt or US\$0.5 per seedling), they were not being bought. Farmers were also unaware that such varieties produce fruit and nuts in three years and are meant to be more resistant to particular diseases. The result was that most farmers were not prepared to go long distances to nurseries to buy seedlings. Farmers tend to plant seeds from their most productive trees but are not fully aware of how age and disease in the stock of trees affect quality and production levels.

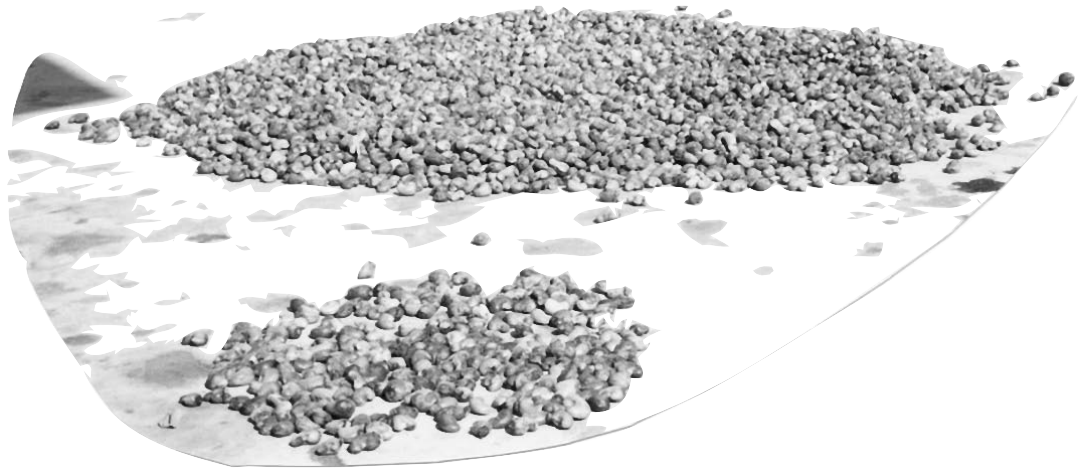
Finding 6: Women are active producers but tend to be excluded from interventions

Many organisations which work to support production do not recognise women's central role in cashew cultivation. Few women were directly involved in spraying programmes. Men tend to dominate training courses, association membership and community level meetings. In some cases, for example, in community nurseries in Gaza province, women were initially involved but as time passed and perhaps because of heavy workloads and/or the quality of communication with women farmers, they tended to drop out.

Key action points: increasing production

1. Although there are positive plans to import generic (non-branded) cheaper fungicides and pesticides, promoting their use by smallholder farmers as a key strategy for increasing production should be reconsidered. Current experience should be critically assessed by INCAJU, working with technical specialists, extension workers and NGOs with experience in the field.
2. Non-chemical treatments should be given more attention. These focus should be on cutting down trees which are severely affected by disease, pruning and clearing as well as planting improved varieties and fertilising trees with organic waste.
3. INCAJU, in collaboration with other relevant departments within MADER, should reconsider the *sale* of improved varieties to smallholder farmers, given that they are not being bought in

**Cashew
nuts drying
in the sun**



significant numbers. Instead the focus should be on communicating the importance of using new varieties, building on the experience that farmers have of selecting and grafting from productive trees and encouraging community level nurseries. Such an approach should be agreed at provincial and local cashew forums so action can be consistent and concerted.

4. All interventions to promote production should recognise women's important role in cashew cultivation and seek to promote participatory and gender-sensitive practice. Women farmers should be recognised in their own right. INCAJU could commission the development of a practical manual on how to directly involve women in communities (including women's groups), drawing out lessons from recent experience of different organisations which have worked in the field.

5. Study findings: processing cashew

Background

Cashew nuts are kidney shaped and brittle, making it difficult to remove the shell without breaking the kernel. But the most significant difficulty in processing cashew nuts is that the shell also contains a caustic oil that can burn the skin and which produces noxious fumes when heated. The oil (known as CNSL, cashew nut shell liquid) contains 90% anacardic acid and 10% cardol.

Raw nuts can be roasted and then cut using impact-shelling machines or hand-held hammers and even stones to separate shell from kernel. More recently, factories tend to be smaller-scale and use the steaming and cutting method whereby raw nuts are steamed, then cooled and cut with a hand and foot pedal-operated machine. This results in less breakage and more valuable whole nuts, but increases workers' contact with CNSL. Workers are given oil to cover their hands, but this provides only limited protection. Gloves wear out quickly and are not favoured by workers paid on a piece rate basis, since they affect dexterity and slow down the work.

The processing steps in the newer factories, usually physically divided into different sections, are: steaming and then cooling the raw nuts; cutting to separate shell from kernel; drying the kernel; peeling; sorting the kernels (separating broken pieces); grading and packing.

Small and medium-scale factories are much less capital intensive and employ more people per tonne of processed cashew than the highly mechanised ones. But even small-scale processing plants are not suitable for small investors. One of the biggest costs is stockpiling sufficient raw cashew to keep the plant working 200 days a year. The cashew harvesting season lasts two to three months, so even the smallest plants require 100 tonnes of stockpiled raw cashew.

Finding 1: National capacity for processing nuts is low and factories face many financial and organisational problems

As described above, following the closure of the large-scale factories, new smaller-scale factories using semi-mechanical technology have opened up. It is difficult to ascertain the number of functioning factories and the number of employees, since figures vary. Our study indicates that factories often close temporarily and the number of workers employed also varies over the course of a single year. Data on the number of workers employed overall varied between about 2,000 and 3,000 (as compared to 10,000 in the early 1990s). Factories only absorbed about 6,000 tonnes of raw nuts in 2001/02, compared to 25,000 tonnes in 1995/96.

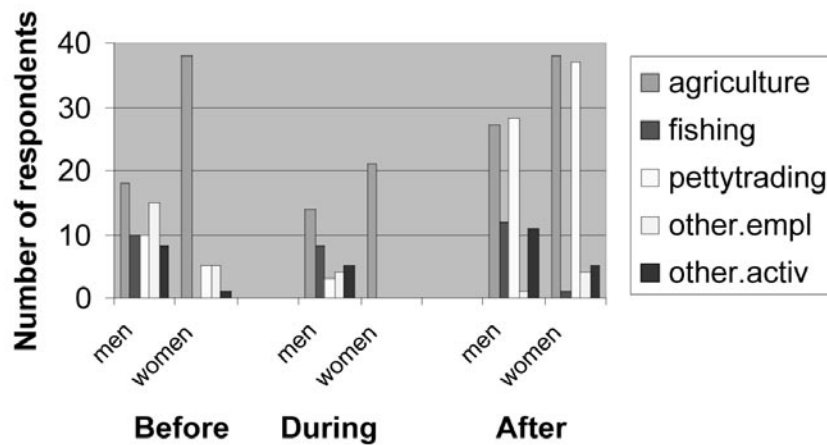
In 2002, we found only two factories functioning in the province of Nampula although two more have opened since then. However, recent INCAJU data (INCAJU, 2003) state that there are seven factories in the province. In 2003, we found only three small-scale factories functioning in the southern provinces, about six had been closed down and three more were temporarily closed. Many factories in both north and south could not afford to buy sufficient stocks of raw cashew, and were also beset by management problems. Women and men workers were frequently laid off work, and more women were laid off than men in the south.

Finding 2: Former cashew factory employees, particularly women, have found it difficult to find other sources of income

Our study of ex-workers in Angoche (Nampula province), where three factories were shut down, clearly shows a process of impoverishment and a decline in alternative sources of income, particularly in a depressed local economy. When the factories were privatised, women lost jobs to a greater extent than men. These women found it more difficult to find alternative sources of income, in part because of their more limited mobility and their domestic responsibilities (Box 3). The loss of jobs affected both women and men, but women were more seriously affected because a high proportion were heads of households and because cashew factories provided one of the few sources of employment for unskilled women. In general, men manage to diversify their income sources to a greater extent than women. Even when they work in factories, men may also be involved in fishing or carpentry (Figure 2). Women workers spend long hours in the factory and farming and household responsibilities absorb all their time.

Figure 2 shows the return to agriculture as one of the main livelihood sources (along with petty trading) after the factory closed, but respondents stressed the difficulty of living on agriculture alone. As one present fish seller pointed out: *“We have all turned to trade but there are few customers because there is no money – Angoche is a city without movement”*.

Figure 2. Livelihood activities of Angoche men and women before, during and after employment in cashew factories



The lack of employment opportunities is also demonstrated by the fact that 1,000 people turned up to apply for 70 jobs when a new cashew processing factory opened in Namige, in Nampula province.

Box 3. Reflections of a young woman who lost her job

The factory in Macia was open from April to November 2001, but did not function in the 2002/2003 season. We had then about 60 workers, mostly men. Men and women both worked in all the three sections of shelling, peeling and selection. I started in the shelling section, but it was difficult, because I was not used to using the hand and foot pedal operating machine and I could not combine it with going to school. School started at 17.00 hours and usually I had not finished shelling my heap of cashew. The official hours were from 4.00 in the morning until 16.30, with a break between 12.00 and 13.00 hours. But it was hard to complete the work, and when you did not finish it, your salary of 670,000 Mts (about US\$28) per month was reduced. I would arrive late for school and therefore I requested a transfer to the peeling section. However, the same work programme was applied in the peeling section and I encountered the same problems of being late for school. I therefore requested another transfer to the selection section, and there I managed to combine my work with going to school. I really like going to school, but with the loss of my job I cannot pay the school fees. I also used part of my wages for petty trade, buying rice etc. and selling it again, making small profits. This petty trade stopped completely after I lost my job. I also used the money to assist a little in feeding the family and to buy clothes. The loss of my job has mostly affected the petty trade and going to school, rather than feeding the family, because my brother, who is a teacher, always helps the family in providing food and clothing. This young woman was about 22 years old. She was concerned that her lack of education would affect her chances of having a better life in the future.



Female worker using cutting machine

Finding 3: In the new factories, wages are low and working conditions poor. Women tend to work longer hours and earn less than men

Wages and working conditions in cashew factories have worsened since factories were privatised and the sector was liberalised. Workers are on piece rates and work long hours (Box 3). They generally earn less than the minimum wage. In one worker's own words:

"After privatisation came new bosses and everything got worse: the crèche disappeared, the health post in the factory no longer had medicines and when we went to the health centre outside, we had to pay and we were marked as absent and did not receive any pay, even if the illness had begun at work"

Another worker said,

"When we are pregnant, this is not taken into consideration in any way, nor do we have any leave, even after the baby is born".

In the south, women work in the shelling section, while in the north this tends to be a male preserve. Peeling tends to be a female preserve in the south, but men have entered this activity in the north. Women tend to work longer hours than men yet earn less. The reasons for this include the fact that men dominate leadership positions which pay better, the rates set for sections in which women predominate may be lower, women may have a slightly lower productivity rate and probably have to take more days off than men to care for sick children. Despite this fact, women tend to save more and send money to family members outside the household.

Finding 4: Trade unions do not exist in the factories or they are weak. Women are poorly represented in unions

From the workers' perspective, where unions have been set up they tend to have changed their role – from defending workers' interests to a management tool to 'control' workers. Union leaders are almost always men. Workers also do not have the medical assistance and crèches that they had in the old government-owned factories. The managers we talked to, on the other hand, tend to emphasise the cost constraints they face in providing services, as well as problems such as absenteeism and theft. Given the lack of employment options, there is no doubt that workers and unions are in a weak position in a competitive environment.

Men shelling cashew



Photo: TechnoServe

In the Cageba factory (Nampula), where many workers complained of a ‘climate of fear’ in the factory, one worker explained how health care for workers depends on their individual standing: *“Health care is only available if you are a friend of someone in a leadership position (“chefe”), no simple worker receives anything.”*

Finding 5: Some factories do provide better conditions for their workers

The Namige factory in Nampula province, recently opened by an entrepreneur with significant support from government and NGOs such as TechnoServe and the Dutch SNV, provides relatively good conditions for workers. This is an example of better practice involving collaboration between government, business and NGOs. Workers receive one free meal, they have access to medical assistance, paid annual holidays and compensation for workplace accidents. The factory also has a union and a simple construction which serves as a crèche.

SNV, along with TechnoServe, ADPP-Mozambique and the Mozambican association for rural development (AMODER), has developed the CASCA programme (Support Programme for the Cashew Sector). The programme has a training component for production and processing implemented by ADPP and a micro-finance component for processing implemented by the local NGO, AMODER. SNV will provide advisory and facilitation services. Namige has been chosen as the first intervention zone because of the new factory we have just discussed. The CASCA programme intends to develop small-scale processing units (so-called satellites) around that factory. Three units have started operating, two owned by men and one by a woman. The owners have received support from TechnoServe for the machinery and its installation. AMODER has provided loans for initial working capital at 2% interest payable over one year. ADPP is providing training and the units employ 12 people each. The units will buy the raw cashew, steam, crack, dry and peel the cashew, and pack it for transport to the factory. However, only men have been employed to work the cutting machines so far. One view is that it will only be possible to recruit women when there is better protection from CNSL, possibly through the import of castor oil which is more effective than the local oil which is used.

In the factory, the nuts are sorted, graded and packed for export. The owner of the factory is responsible for finding the buyers, although in the case of Namige, the owner already has a good relationship with a Dutch buyer who can absorb high volumes of processed nuts for export to various parts of the world.

It also remains to be seen if the satellite units are commercially viable. At present, the Namige factory owner and TechnoServe have some reservations about their financial viability and sustainability because quality and productivity have been low (the appearance of the nuts, the proportion of 'whole' nuts produced), costs are high and prices of kernels on the international market remain low.

Finding 6: 'Informal' processing is increasing in the south

There has been an increase in home-based processing in the south, particularly in Maputo. One study estimated that 6 tonnes of raw cashew are processed per day in the suburbs of Maputo, mainly by women (Machaela, 2001). Former factory managers and ex-workers are using their skills to develop new processing and trading networks (Box 4). The women we interviewed in work long days in poor conditions and almost always depend on intermediaries to provide raw cashew as they lack the funds themselves (Box 4). Some home-based processors buy small quantities of raw cashew themselves at the market in Maputo. In this way they avoid loans and cashew providers. They sell the processed nuts at the market or to any other interested person.

Box 4. Organising home based processing in Maputo

Former factory managers appear to be important initiators of home-based processing activities. One such individual explained that he used to be a director of a factory, buying raw cashew and exporting kernels to Europe, the US and the Soviet Union. While the factory closed in 1994, people continued to request processed nuts. He then decided to start home-based processing activities.

He started in 1996 by buying raw cashew straight from the farmers and rural shops and transporting it to his home in Maputo, where he employed 32 women and 2 men. He paid them wages (350,000 Meticaís per month) and reached a processed output of 500 kg a day. He sold his product to shops in Maputo, and in South Africa via women traders. However, according to him, not all the employees worked well, and they produced a high proportion of broken nuts which fetched lower prices. In 1997 the business collapsed in debt, as he could not repay loans he had received to buy the raw cashew.

Later in 1997, he stopped paying wages and started to provide raw cashew (credit in kind) to the women in their homes. The women processed the nuts and then re-sold them to him. He explained: *"The women could make a profit of 400,000 Meticaís a month, which was equivalent to a minimum salary, and sometimes they made three times as much, depending on the quantities they managed to process"*. Until 2000/2001, he obtained his raw cashew from Manjacaze direct from the growers and from the local shops. In the 2002/2003 season he had difficulties in financing the buying and transporting of raw cashew to Maputo, but women continued to process them in their homes, obtaining the nuts from other cashew traders. Some women, he explained, also started selling the cashew fruits.

During the period when he provided raw cashew to the women's homes, he estimated that about 260 people (approximately 50 homes) were processing the nuts. These people had no money to buy the raw cashew themselves. Many of them were these women were, heads of families and they liked to work with him, he explained, as he paid them well for their processed nuts.

Key action points: Processing cashew

1. Continue to support the establishment of small-scale factories; consider how to make affordable credit available to establish more factories; provide business development services for better management. The question of affordable credit affects many sectors in Mozambique and has to be addressed at a national policy level. Even at current rates of interest, making more funds available to establish factories may need to be discussed with donors and financial institutions (with INCAJU taking the lead). INCAJU should encourage factory managers to participate in the current forums which discuss the cashew sector, for example at provincial level.
2. Improve working conditions in cashew processing factories by informing, educating and communicating with the workers in platforms where employers, trade unions and (where appro-

Girl roasting cashew nuts



priate) NGOs are represented. Women should be given equal opportunities and encouraged to work in all sections. The central workers' union should take the lead to establish constructive tri-partite discussions with government and employers to determine a minimum wage and working conditions in the cashew factories.

3. Support home-based processing of cashew nuts in Maputo (including packing), with institutional, organisational, financial and technical support. INCAJU should investigate the possibility of developing a specific project with an appropriate NGO and seed funding from a donor. The funding could be used to establish associations, provide funds which can be the basis of a revolving fund, provide information about trader networks and technical assistance with quality standards, packing and so on.
4. Take up proposals which have been made to INCAJU for local processing of the cashew fruit. INCAJU should actively seek implementing organisations and funds for these projects. Such projects should include a marketing strategy.
5. Investigate further the possibilities of increasing the final processing of cashew nuts within Mozambique, which implies roasting, salting (adding other flavouring) and packaging. This is because much of the value is added in the final stages; at present large profits are made by the companies which do the final processing in Europe and the United States. Organisations such as TechnoServe should discuss the possibilities of increasing in-country final processing and packaging with successful processors.

6. Study Findings: Cashew marketing and trade

Finding 1: The price to the farmer for raw cashew is very variable and influenced by many factors.

Prices paid to the farmer depend on a range of factors including international prices, the quality of nuts, the number of intermediaries and the time and location of sale.

As discussed in section 3, the level of supply and demand in US and European markets influences international prices. In Mozambique, the export trade is controlled by a few large exporters who tend to fix the buying prices each year. In fact, since India is the major buyer of raw nuts, the price is based on what Indian importers are prepared to offer, based on international prices for kernels. These prices are affected by the entry of countries such as Vietnam on to the international kernel market. The quality of the nuts is increasingly important and Vietnam has recently managed to capture greater shares of the international market on this basis.

There are 80 to 100 large traders in cashew in Mozambique, most of whom are well linked to the main exporters. These larger traders rely on a network of small intermediaries who buy raw cashew directly from the farmers and retail shopkeepers in the rural areas or small urban centres. Unlicensed mobile buyers have increased in number as a result of liberalisation.

The extent to which smallholders can sell their raw cashew nuts depends on their access to markets, which is highly dependent on access to and distance from main roads. In Itoculo, in Nampula province, for example, access to markets is difficult and in 2002 there were few buyers for raw cashew. On the other hand, Macia in Gaza province is on one of the principal north-south roads and there are numerous buyers of both raw nuts and kernels. Farmers who live further away from main roads have fewer buyers and even less negotiating power over prices or the terms of barter than those with better road links. Last but not least, farmers who can afford to store their raw cashew and sell them towards the end of the season can obtain a much higher price.

Finding 2: National production levels are rising and so are the quantities exported, but the gains to the national economy and to farmers are not

Production and exports have slowly risen over the past five years. However, international prices have been volatile and generally declining. This means that the terms of trade are deteriorating, with Mozambique earning less foreign exchange despite exporting more. As the most recent INCAJU report points out, the proportion of the border price that the farmer receives in relation to the exporter has also declined (INCAJU, 2003). In 1999/2000 when prices were high on the international market, producers received US\$0.54 per kilo, which was 63% of the price the exporter received. In 2002/03, farmers received US\$0.22; 56% of the price. These figures are averages and our study shows the variability of the actual prices received by farmers. Nevertheless, the trend is not encouraging.

In 2002/03, rises in production were greatest in Nampula and Zambezia provinces, although it should be noted that there is much marketed production in the south of the country that is not officially registered.

Raw cashew nuts for sale



Farmers and traders are aware that prices and the terms of trade are deteriorating. When asked their opinion about how things had changed they tended to compare the present with colonial times. As one small trader in Gaza said:

"It was better before; I grew up knowing that money from cashew could pay for school fees, hospital care, clothes...now it is not like that."

We heard this kind of comparison frequently, in Nampula province too.

Finding 3: Men dominate in cashew trading, which requires greater initial capital and which brings greater profit

Our study of trade in raw cashew, kernels, fruit and juice trade in Macia, Gaza province (Box 5) showed that men tend to dominate in the most lucrative trading activities (raw cashew and kernels, rather than fruit and juice). Smaller traders more often combine agriculture with trade as their main livelihood activities. The women who participate in the more profitable trade (kernels and raw cashew) usually raise initial finance from the sale of agricultural products, whereas the men tend to use savings from waged work and commercial activities.

Kernels are usually sold along the main road in Macia where men can run to potential customers more quickly than women. As one woman explained:

"I suffered a lot with those boys on the street, because the system is that you have to run when a car appears, and then the boys are faster and block my way".

She decided to sell her home-processed nuts at the local market in Macia and she manages to send her children to school and buy clothes with her profits.

Women almost completely dominate the marketing in of fruit and juice; these are perishables and can only be sold seasonally. While they do not require initial investment, they also bring less profit. However, as the following quotes illustrate, women need cash income:

"Before we just prepared juice to have at home... we have only learnt about selling it now that the cost of living has risen."

"I used to only farm, now that is not enough and I have to do other things."

As one man put it:

"The women of today are not as they were before – only knowing how to farm- now they do all kinds of things and take risks (desenrascam a vida)"

Box 5. Trading in raw nuts: Elisa's story

Elisa Macuácuá is a trader in raw cashew and maize flour and has a stand in the market in Macia. She is a 40 year old widow with five children and two younger sisters who are dependent on her. Trading is her main activity and she pays someone to farm her plot so as to save money on food.

As she put it: *"The idea of trading came from suffering, because I needed to feed my children and send them to school"*. She began in 1992 by selling cashew from her parents' trees in a market in Maputo and then later progressed to renting a stand in the market in Macia. In 1995, there was little cashew in Gaza province and Elisa, 8 months pregnant at the time, decided for the first time to buy cashew in Muxungué, 800km away in Sofala province. Since then, she has made periodic visits to Sofala to buy both cashew and maize flour but says it is not as profitable as it used to be. The journey takes between one and two days by bus. She spends one to two weeks away, buying cashew and waiting for transport to return.

In March 2003, a student working on this study accompanied Elisa and her 18 month child to Sofala province. The journey was hard and risky – they slept on route on a blanket under a truck and had to use dirty water for drinking and cooking. When they reached Nhalapa in Sofala, Elisa borrowed a market stand from her friends there and placed 2 empty cans there as a signal that she wanted to buy products. It took her two weeks to buy 30 sacks of maize meal, mainly from women. She then began to intercept loaded trucks going further north to ask for transport back to Macia when they returned empty. She waited four days for transport back and the journey took two days and three nights, sitting on the sacks with her child.

Although trading is difficult, Elisa has a house with cement walls and three rooms from her labours. Her dream is to give her children a brighter future by sending them to a secondary boarding school where she feels they are made to study hard and may become successful in the future.

However, in Namige we found that women are actively involved in the marketing of raw cashew nuts. Our findings contradict those of some previous studies in Nampula that found most income generating activities, including the marketing of cashew nuts, are dominated by men. For example, 87% of our sample households in Namige did sell raw nuts (39 out of 45); 74% of women (in the sub-sample of households which do sell nuts) are directly involved in marketing the nuts. However, our study also shows that cashew remains an important crop for household consumption and as such contributes to household nutrition and food security. 93% of the interviewed women said they processed nuts themselves (at home) for consumption, with only one woman reporting that her husband did this work. 64% of the women process the fruit in some way, making juice and alcohol which may be consumed, sold or given as gifts or payment in kind, for example, for help in their fields. Women are therefore highly involved in both processing of fruit and nuts at the household level and in the marketing of raw nuts. Although production for the market is important, intervening organisations should give due importance to the production of cashew for consumption and for sale in local, as opposed to international, markets. The use of cashew at the local level has a role in household food security, provides income and strengthens social relations.

Finding 4: In the south, local and regional markets for cashew kernels are developing and women are active participants

As we have shown, women in the south are active in local and regional cashew markets. They are well represented in the categories of small intermediaries and non-licensed buyers, but are usually not represented among the medium or larger trader and exporter categories.

The development of local and regional markets reduces dependency on volatile international markets. These markets are likely to benefit both the national economy and women in particular, since women tend to be more involved in local and regional markets. South Africa and the countries which surround Mozambique (with the exception of Tanzania) do not produce cashew nuts and provide offer a huge potential market, with particular comparative advantage for traders in the south of Mozambique. Mozambican kernels are already found in small quantities in these countries. Demand (but also competition) on the domestic market is also slowly growing.

Cashew kernels for sale



Finding 5: Completely liberalised markets tend to benefit those with more resources, be they financial, natural or social

Although cashew markets and local trading networks have developed since liberalisation, the gains tend to accrue to those with greater resources and power, for example, such as farmers with better information and networks, who live near roads and urban centres, who have more surplus production, savings to invest and so on. If markets are to contribute to the livelihoods of resource-poor farmers and to benefit women as much as men, then markets need to be 'governed'; support in critical areas needs to be directed to these groups.

Key Action Points: Trade in cashew

1. Credit to buy raw cashew needs to be considered at different levels. Larger traders have problems similar to those of processors, especially overall credit policy and the high interest rates mentioned in the previous section. Micro-credit could help small-scale traders, particularly women. Some NGOs are already providing micro-credit to small traders and the experiences to date should be assessed by INCAJU to see if such interventions should be encouraged for cashew.
2. Informal trade in domestic and regional markets needs to be stimulated without stifling their development with over-regulation. Information on potential markets and quality/standards needs to be disseminated. INCAJU should discuss how such dissemination could be organised with organisations such as TechnoServe which already have experience in this area.
3. Farmers need to be informed about market prices, their negotiating power needs to be improved and they need help organising the marketing of raw cashew nuts. NGOs, MADER and all organisations working with farmers' associations could include such information and skills-building in their existing programmes. It is essential to actively encourage women to join associations and include them on skills-building programmes, paying attention to the location and cost of such initiatives so that they suit women's needs and constraints.
4. Investigate the possibility of fair trade projects to exploit specific niches in international markets. This would mean finding processors who are willing to pay better prices to producers and processing workers and to make the link with fair trade organisations in Europe. INCAJU could investigate if any NGOs, such as OXFAM or Action Aid, could help with this.

7. Conclusions

In today's global environment of liberalisation and the move towards global standards for processes of production, quality requirements and the 'branding' of products, we need to ask how countries in the South can avoid engaging in a 'race to the bottom': reducing the costs of producing cashew, particularly prices paid to farmers and labour costs in the processing industry. At least part of the answer lies in better communication with farmers, increasing farmer and worker organisation, diversifying products, paying attention to local and regional markets and accessing 'niche' markets, for example through fair trade initiatives. The importance of cashew to local livelihoods should not be underestimated. Farmers are enormously inventive in using cashew to improve their livelihoods in the face of several structural constraints. Outsiders can get a much more comprehensive understanding of what helps and what does not if they understand local realities and the various strategies which women and men use as they respond to changes and trends in their environment.

The cashew sector includes production, processing and commercialisation. The areas are intertwined and the success of an activity in one area often depends on success in another area. This interdependence, together with the continuous change in the global context, makes coordination, communication and dialogue between different actors indispensable. The establishment or strengthening of existing platforms to improve communication and stimulate collective action is of utmost importance for strengthening the cashew sector.

INCAJU is the key public institution with the mandate to coordinate, support, monitor and evaluate all three areas. This facilitating and coordinating role has to be strengthened, given that so many activities are out-sourced and carried out by NGOs and the private sector. INCAJU's monitoring, lesson-learning and dissemination activities should disaggregate data by sex, recognise women's central role in the cashew sector and promote equal opportunities for women. All those involved in supporting the cashew sector should avoid making assumptions about 'traditional' gender relations – that women have a lot of power or that they do not. Reality is more complex and dynamic; the challenge for researchers and project implementers is to keep an open mind and to listen to and engage with women in their own right.

The contribution of the cashew sector to poverty reduction is enormously dependent on the extent to which women can engage with and benefit from the sector. Increasing women's control of cashew trees – and better access to extension services to raise the productivity of the trees – is important in two key ways. Firstly, it increases women's cash income (through selling or bartering nuts, juice and alcohol), and secondly, it contributes to the food security and welfare of their families, particularly as women tend to use a bigger share of their income than men on basic needs. Increased income-earning opportunities for women in small-scale factories, home processing and marketing have the same effect of contributing to poverty reduction and are a particularly critical source of income for poor female-headed households which are poor. Increasing women's participation in interventions to promote cashew production will tend to increase the total number of farmers involved and the total productivity of the sector, which in turn increases its contribution to the national economy. Promoting gender equality therefore both promotes women's rights as an end in itself and contributes to the strengthening of the cashew sector and its role in food security and poverty reduction.

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