



Analysis of The Cashew Value Chain in Honduras

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*Cashew Conglomerate of the Southern Region of Honduras
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Historical Outline

In the year 1972, the cultivation of cashew was introduced into the Southern region in Honduras as an initiative directed towards reforestation, but at the same time with commercial exploitation. This initiative was promoted and supported by the Government of Honduras. The Project took into consideration installing a processing plant in the municipality of Namasigue; which is why many organizations of the reformed sector (farmers' settlements and agricultural co-operatives), mainly in the area of El Triunfo and Namasigue, decided to grow cashew. Because the processing plant was not installed, the growers had no market, which caused elimination of many plantations and demotivation among the growers. During the decade of the nineties, farmers' enterprises emerged that processed cashew nuts, such as CREPAIMASUL for instance. At that time, the demand for cashew nuts increased significantly in the region, bringing new motivation to the growers to exploit the product.

In 2005, the southern region of Honduras was made up of about 662,789 persons, representing 10% of the total population of the country. The majority of the population lives below the poverty line (8% out of every 10 persons is poor). Only 8% of the total population is literate (the national average is 71%). Coverage of health services is extremely limited, affecting mainly the most vulnerable population, such as children under the age of five, women who are the head of the home and the elderly. The weak economics of the region cause strong migration to other territories and countries, (especially by young people). The cashew item is in the hands of small farmers of the region, most of which are affiliated to rank and file union organizations. The processing of the cashew strongly includes women. This is why this product can boost the generation of jobs and income for poor families. This crop has very few technical and input requirements. It is estimated that at present it benefits 1,800 persons indirectly, because intensive labour is required. Cashews fully adapt to the unfavourable climate conditions of the region.

The Cashew Conglomerate of South Honduras saw the light thanks to the main organizations dedicated to cashew production and processing. Although the crop represents an important asset, it has not been consolidated as a sustainable source of income and of quality of life for its producers. The idea of the Conglomerate arose after a consultation process by the Centre of Human Development during the first semester of 2007. The study was sponsored by VECO Mesoamerica (www.vecoma.org), to identify the strategic cooperation lines for the Cashew Chain in the Southern region of Honduras. Small-scale agriculture, with options towards a better market insertion, was identified as a work line. In the second semester of 2007, the second part of the CDH/VECO-MA Alliance was started up; an Action Plan 2008 was elaborated, including a cashew diagnosis as well as the definition and formation of the Conglomerate.

As part of the Action Plan 2008, work was done about organizational strengthening and business and union articulation (mainly between artisanal producers and processors). Also, the Strategic Plan 2009-2011 was developed in a participative way. The conglomerate consists of 5 union organizations (UNC, CNTC, ACAN, AHMUC and UTC); 2 producers'

companies (CREPAIMASUL and EGL); 15 farmers' groups; 2 agricultural cooperatives; 77 associations-companies and 9 artisanal processors (in total 1160 producers).

The technical and administrative support of the Cashew Conglomerate is realized by CDH through the Alternative Local Development Programme. Organizational processes as well as production for food security are promoted, and local patrimonies are promoted for their articulation in the market (cashew being among them). Therefore, the efforts made in planning and accompaniment of the Cashew Conglomerate, are inscribed within the general business development strategy of CDH.

Vredeseilanden or VECO (www.vredeseilanden.org) is a Belgian non-governmental organization for development cooperation, which works with union and / or economical farmers' organizations that receive technical, methodological and financial support in the Development of Value Chains in Sustainable Agriculture, in Policy lobbying in favour of Food Security and Sovereignty, and in Responsible Consumption. VECO-MA (www.vecoma.org) is the regional programme of Vredeseilanden in Mesoamerica. In Nicaragua, Costa Rica and Honduras, Veco accompanies farmers' organizations economically around sustainable and organic agriculture, market access, gender equity focus, interculturality and citizen participation. One of the chains given priority by VECO-MA is Organic Cashew, due to its compatibility with the environment and its economic potential.

Objectives of the Chain Analysis

- Elaborate an action plan to improve the competitiveness of the Cashew Chain in the South of Honduras.
- Study the functioning of the production, processing and commercialization links as well as their players, support services and commercialization channels.
- Promote a participative co-operation among the players of the South Honduras Cashew Chain.



who helped build this analysis.

The methodology used in this analysis makes use of methodological tools that are recognized in the area of rural business development (see bibliographical references). The analysis included four main stages: mapping of the chain, prioritization of problems, the definition of market strategies and the elaboration of an action plan. The process consisted of theoretical lectures, group exercises and surveys of organized farmers-producers (Baseline). The report was socialized among representatives of the Conglomerate to improve their analysis. Table 1 lists the participants

Table. 1. Participants in the Cashew Value Chain analysis in Honduras. October 2008.

NAME	INSTITUTION	TELEPHONES
Carlos Rodríguez Pavón	CREPAIMASUL	9913-5920
Porfirio Martínez	ESTRASUR	9744-0346
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Reminelio Zepeda Rodríguez	EGL	9982-1737
Lucía del Carmen Ordóñez	AHMUC	3260-1029
Catalina Cabello	UTC	9781-4578
José Valentín Zepeda	TRIUNFEÑITA	
Francisco Aguilera	Cooperativa de Productores de APACILAGUA	3369-2714
Gabriel Corrales	SENASA	782-0348
Pedro Baquedano	CREPAIMASUL	
Wilfredo Contreras Santos	UNC, Valle	3365-6858
Mariano Muñoz	ACAN	3394-1889
Sixto Méndez	CNTC	3354-7686
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Map of the Chain

Figure 1 represents the Map of the Cashew Chain in Honduras; it shows that many small-scale cashew producer organizations exist, such as AHMUC, CNTC, UTC, UNC Estrasur, UNC Estravalle, ACAN and the Apacilagua Producers' Network. There are also groups of certified organic producers like CREPAIMASUL and SOPROCOMA; these have collection centres in the communities, to store produce and take it to their processing plants. Other important players are the independent producers. Table 2 shows the indicators of the Baseline of the Cashew Conglomerate for the average family dedicated to this crop (Source: CDH, 2008). With the support of VECOMA, a Baseline is being elaborated at the level of the families benefiting of the Conglomerate. This will be published in the course of 2009.

Table 2. Indicators of the average family of the Cashew Conglomerate. Source: CDH, 2008.

INDICATOR	RESULT
Human capital	
Number of members	5 to 7 members
Members of 1 to 10 years old	15%
Members of 11 to 20 years old	23 %
Members of 21 to 60 years old	49%
Members older than 60 years	13%
Illiterate members	29%
Persons with primary school incomplete ¹	38%
Persons with primary school completed	25%
Persons with secondary school incomplete ²	4%
Persons with secondary school complete	4%
Production capital	
Average area planted	2,5 blocks/producer
Average yield on old plantations ³	12 qq/Bl seed with shell
Average yield on new plantations ⁴	15 qq/Bl seed with shell
Period of harvest	From February to half of May
Producers with own individual land	50%
Producers with collective or group land	50%
Destination of production	100% for sales
Land with final title and / or full ownership	35%
Land with mortgage title	4%
Land with document in guarantee of possession	12%
Land with usufruct document	38%
Land in adjudication application	5%
Land or properties in recovery ⁵	2%
Land in conflict	4%

¹ Primary school incomplete refers to persons having studied up to third grade.

² Secondary school incomplete refers to persons having studied only the common cycle.

³ Old plantations are those of more than 25 years.

⁴ New plantations are those of less than 25 years.

⁵ Properties in recovery are those lands that are adjudicated without legal documents and whose owners have not been compensated.

The local intermediaries buy the nuts with shells at the farm, at a price of between 200 and 380 Lp/qq; their average volume can vary between 20 and 50 qq/year. There are also Guatemalan, Salvadorian and Nicaraguan intermediaries who take the product out of the country. Their average purchase volume is 5000 qq/year. It is common that they give cash advances to the producers between August and December (before the start of the harvest); with this money, the producers are tied to low prices. The nut with shell is purchased at field quality (without classification). It is very important to note that there are approximately about 37000 metric tons of false fruit produced each year, mainly destined to become cattle food, fresh consumption, organic fertilizer or thrown in the waste bin.

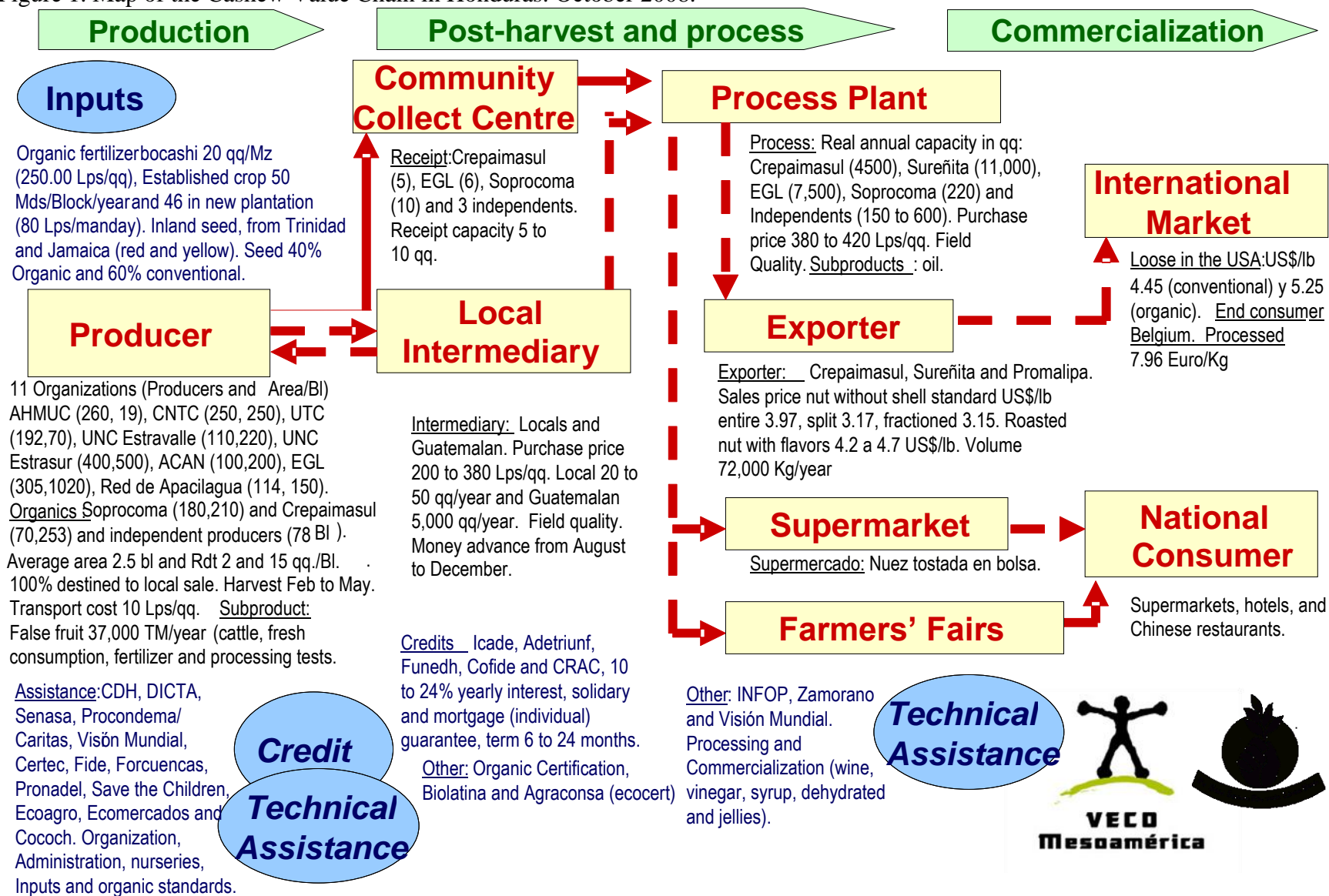
The processing associations-companies have capacities up to 19000 qq/ year; whereas the independent artisanal processors can have about 150 to 66 qq/year. The quality is field quality, and their purchase prices vary between 380 and 420 Lp/qq. Some processors that extract the crude almond (without frying process) also extract oil from the shell. The processors sell the nut mainly without shell to the exporters. In the case of Sureñita, they are the only ones who sell to supermarkets (roasted almonds). A few companies export the nut without shell, pro-cooked and / or cooked, abroad; PROMALIPA exports to El Salvador, CREPAIMASUL towards the Fair Market in the United States, and La Sureñita towards the Fair Market in Europe.

The producer support services include technical assistance in organization, administration, nurseries, inputs and organic standards; these services are free and are provided by CDH, DICTA, SENASA, PROCONDEMA/CARITAS, Visión Mundial, FIDE, FORCUENCAS, CERTEC, PRONADEL, Save the Children, ECOAGRO, ECOMERCADOS and COCOCH. The credit providers are ICADE, COFIDE, ADETRIUNF, FUNEDH and rural banks (promoted by FUNDER). The interest rate varies between 10 and 24% per year; the guarantees can be solidary and mortgage (individual), and the terms can be from 6 to 24 months. The suppliers of organic certification services are BIOLATINA and AGROCONSA (ECOCERT). As for processing, INFOP, PRAC/ZAMORANO and Visión Mundial support processing and / or commercialization of derived processed products such as wines, vinegar, syrup, (dehydrated) raisins and jellies.



Most of the relations between the players are informal. The unique and most solid relationship of confidence is that between the producers that are part of the companies CREPAIMASUL, EGL and SOPROCOMA, which have transparent rules concerning purchase prices.

Figure 1. Map of the Cashew Value Chain in Honduras. October 2008.



Prioritization of Problems

The Conglomerate has defined the most common problems in the production stage to be:

- Lack of economic resources.
- Prolonged drought (periods of many days without rain, normally between June and August).
- Sudden climate changes (strong winds or rains on warm days, causing the flowers and / or fruits to fall).
- Bad quality of seeds (low germination and variety unknown).
- Soil plagues (termites and fungi) and crop plagues (bugs, leaf-footed bugs and others, which damage small flowers and fruits).
- Lack of technical assistance (management and pruning).
- Old plantations (low production, bad branching when pruning and death).

In processing, the following have been identified as being common problems:

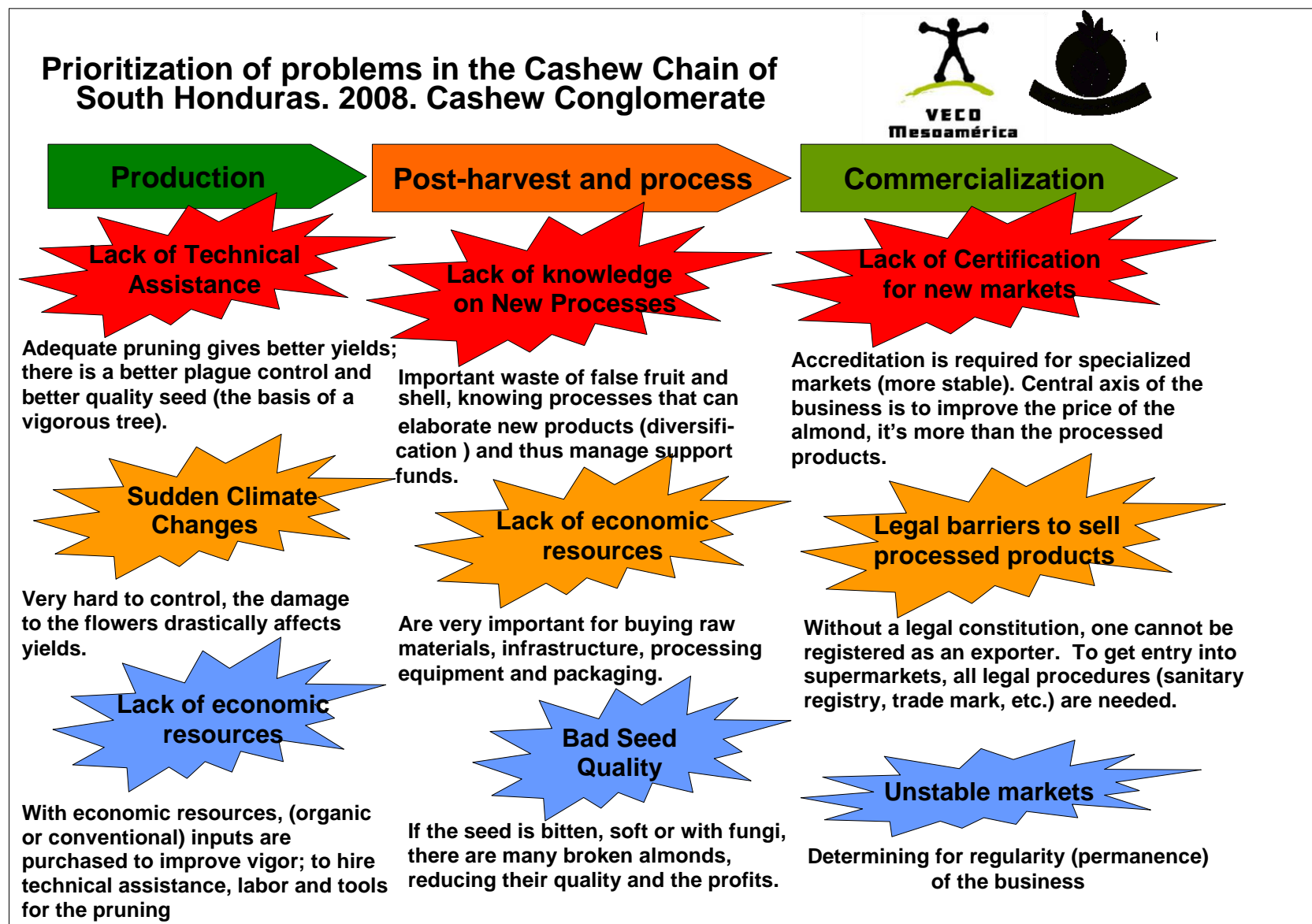
- Bad seed or nut or shell quality.
- Inadequate infrastructure and processing equipment.
- Lack of knowledge of new processes for nut and false fruit.
- Lack of materials and equipment for packaging, and lack of economic resources.

In commercialization, the following have been identified as being common problems:

- Lack of a stable market (no contracts and low prices).
- Lack of market knowledge for almond and by-products.
- Lack of certificates to enter specialized markets (organic and fair trade).
- Legal barriers for commercialization of processed products.

Using the “Double entry matrix” tool, the three most critical problems for each item have been prioritized; ANNEX 1 shows the results of the matrices per item. Figure 2 shows the results of the prioritization of problems as well as its justifications.

Figure 2. Problems prioritized per item of the Cashew Chain.



Market Strategies

Next, a short analysis of the world imports of cashew nuts is presented, then of the export by Honduras and finally the market strategies of the Cashew Conglomerate of Honduras. At world level, the cashew nut or unshelled almond has a much higher value than the nut with shell. Table 3 shows that the value of cashew nut imports reached 1,23 billion US dollars (US\$) in 2006, which is equivalent to 272.165 tons. It is noted that the countries that represent 80% of the imports are, in order of importance, the USA (43%), the Netherlands, the United Kingdom, Germany, Australia, Canada and France. This shows that this product has a high market potential at world level.

Table 3. World imports of cashew nut without shell (crude or cooked). Source: International Trade Centre (ITC).

Importers	Value of imports 2006 (thousands of US\$)	Tons imported in 2006	Unit value (US\$/Ton.)	% of participation
World estimate	1,231,354	272,165	4,524	100%
USA	525,167	115,087	4,563	43%
Netherlands	174,575	35,723	4,887	14%
United Kingdom	85,265	21,377	3,989	7%
Germany	73,439	14,459	5,079	6%
Australia	60,737	14,130	4,298	5%
Canada	40,593	9,444	4,298	3%
France	29,547	6,300	4,690	2%
Rest of the world	242,018	5,825	4,539	20%

From 2002 to 2007, average monthly export of unshelled almond was 11.532 kilos. The months with highest average exportations are August, October and November, whereas the months with lowest exportations are March, April and July (no export in January).

As for export of cashew nut by Honduras, there have been important changes, as during 2002 and 2003 no exportations were reported, according to the data of the National Institute for Statistics (Instituto Nacional de Estadísticas - INE)⁶; on the other hand, a significant reduction is observed of the export of unshelled nuts, as well as a significant increase of the shelled nut in 2007⁷. Table 4 shows that the *nut without shell* has an annual average of **511.499 US\$, 89.601 kilos** and an FOB price of **6,06 US\$/Kg**; the average annual growth is **6%**, however it must be mentioned that during 2007 there was a very drastic decrease of 89%. As for shelled nut, it has an annual average of **44.336 US\$; 65.447 Kilos** and an FOB price of **0,62 US\$/Kg**; its average annual growth is **148%**, this can be due to the entry of intermediaries of other countries taking the seed with shell (Guatemalans, Salvadorians and Nicaraguans).

⁶ Statistics of the Central Bank of Honduras show very similar tendencies to the ones of the INE.

⁷ Statistics of the BCH show that per September 2008, exports of shelled nuts were 112% above these of 2007.

Table 4. Exports of Unshelled Nut (08013200) and Shelled Nut (08013100) by Honduras. Source: INE. Analysis: Southern Honduras Cashew Conglomerate, CDH and VECO Mesoamerica.

Customs Heading	Concept	2004	2005	2006	2007	Annual Average
Unshelled 08013200	US Dollars	435.016	686.898	799.414	124.667	511.499
	Kilos	69.783	106.026	163.785	18.808	89.601
	Price FOB US\$/qq	6,23	6,48	4,88	6,63	6,06
	% increase Kilos		52%	54%	-89%	6%
Shelled 08013100	US Dollars		20.826	17.603	94.580	44.336
	Kilos		40.775	29.803	125.853	65.477
	Price FOB US\$/qq		0,51	0,59	0,75	0,62
	% increase Kilos			-27%	322%	148%

Table 5 shows the analysis of the destination of exportations. One can note that for nut without shell, the main destination countries are Germany and El Salvador, whereas for shelled nuts it is Guatemala and Nicaragua (where the extraction of the almond takes place).

Table 5. Exports of Unshelled Nut and Shelled Nut by Honduras. Source: INE. Analysis: Southern Honduras Cashew Conglomerate, CDH and VECO Mesoamerica.

Product	Country	2004	2005	2006	2007	Annual Average Kilos	% of participation
Unshelled 08013200	GERMANY	54.541	49.175	79.352		61.023	51%
	EL SALVADOR	15.242	38.249	80.337	12.858	36.672	31%
	NETHERLANDS		18.599			18.599	
	UNITED STATES		3	4.096	5.950	3.350	
	TOTAL	71.787	108.031	165.791	20.815	119.643	
Shelled 08013100	GUATEMALA		40.775	7.076	122.404	56.752	68%
	NICARAGUA			22.727		22.727	27%
	UNITED STATES				3.449	3.449	
	TOTAL		40.775	29.803	125.853	82.928	

To define the Product / Market strategies, use was made of the Ansoff (product / market) matrix; the Conglomerate decided to work on the strategies of market penetration, market development, product development and diversification. Table 6 shows the specific products and markets for each strategy. These strategies will increase the competitiveness of the Conglomerate, as the supply of sub-products will not only increase diversification of supply but also sales. On the other hand, an incursion in new market segments at regional and international level is being proposed.

Table 6. Matrix of product / market strategies for the Cashew Conglomerate of Honduras.

	Existing markets	New markets
Existing products	<p>MARKET PENETRATION</p> <ul style="list-style-type: none"> • Nut (with shell) to national intermediaries, Guatemalan, Salvadoran, Nicaraguan and processors • Raw almond to intermediary • Pre-cooked almond to intermediaries • Crepaimasul certified organic almond pre- and cooked, exported to Fair Market in USA (Transfair). 	<p>MARKET DEVELOPMENT</p> <ul style="list-style-type: none"> • Raw almond to Aprainores • Pre-cooked organic almond to Europe and Oro Verde Costa Rica • Pre-cooked almond to El Salvador (Diana, Bazzini)
New Products	<p>PRODUCT DEVELOPMENT</p> <ul style="list-style-type: none"> • Cashew sweet with sugar, exported to Fair Market USA 	<p>DIVERSIFICATION</p> <ul style="list-style-type: none"> • Roasted nut with salt, sugar, capsicum and / or lemon to consumer (small markets, supermarket) • Processed products from false fruit, wine, raisin, jelly, vinegar, syrup and concentrated juice in supermarkets • Concentrate for cattle (fibre) • Cashew syrup for naturist shops • Cashew butter • Shell oil for the painting industry, to treat Wood and others. • Shell as organic insecticide (kills mosquitoes)

Action Plan

Once the most critical problems of the chain, such as the market strategies of the Conglomerate, had been prioritized, the action plan was defined for a term of 3 years. This plan contains the vision, mission, objectives, activities and performance indicators (grouped for each item of the chain and according to objective).

Vision of the Cashew Conglomerate

We are small and medium scale producers, processors and commercializers of the cashew patrimony, its by-products and environmental services, which we wish to consolidate as a leading Conglomerate in the Southern region of Honduras, improving the living conditions of the participating families and communities.

Mission of the Cashew Conglomerate

To become a strong, competitive, leading organization in the national and international market, adding value to the cashew, in order to achieve a solidary, independent and sustainable economy over time.

Table 7. Action Plan 2009-2010 of the Cashew Conglomerate of Honduras.

Item	Objectives	Activities	Indicators	2009	2010	2011
Production	Producers access technical support for production	Elaborate a diagnosis of TA needs (crop management)	1 diagnosis			
		Hire 3 specialized technicians for support in the elaboration of organic fertilizers, sanitary and shoot pruning, making terraces and fertilization by <i>comaleo</i> .	3 technicians hired			
		Capacitate producers in elaboration of organic fertilizers, plague and foliage management, pruning of shoots, classification of seeds, grafting, additional irrigation (<i>botellón</i>), production costs and live barriers.	300 producers capacitated			
		Exchange trips in Central America	3 trips in CA and 3 national trips			
		Socialize information of the trips	6 local socializations			
		Legalize the cashew conglomerate	1 legal constitution			
		Set up a Cashew Field School (CFS) for new plantations	1 CFS set up			
	Risk of sudden climate changes reduced	Plant wind-breaking barriers around farms (guama, laurel, caoba)	30% of producers own barrier			
		Improve plant nutrition (macro and micro nutrients)				
		Do garden-type pruning (treetops)	50% of producers with garden-like pruning			
		Evaluate option of an agriculture insurance	Insurance option identified			
	Producers accessing economic resources	Identify sources of donations for the conglomerate (ERP, CMC)	5 donation sources			
		Prepare and manage proposals for the conglomerate	5 proposals managed			
		Identify sources of soft financing	5 financing sources			
		Prepare and present requests to financial institutions	5 requests to finance sources			
		Execute incidence action in BANADESA as a conglomerate	1 trimester meeting with BANADESA			
		Form rural Banks through BANADESA trust	10 rural banks installed			

Table 7 continued

Item	Objectives	Activities	Indicators	2009	2010	2011
Processing	Processors master new processes for nuts and false fruit	Training on cashew processing in INCOP and ICTA Guatemala	2 trainings / trips			
		Contract an agro-industrial consultancy for development of new processors for nuts and false fruit	1 consultant hired			
		Train processors in the new processed products	12 prototypes of processed products			
		Elaborate a processing guide	1 processing guide			
		Train processors in Good Manufacturing Practices (hygiene)	5 processors trained			
		Train processors in organic certification	5 processors trained			
	Processors access economic resources	Identify sources of donations for the conglomerate (ERP, CMC)	5 sources of donations			
		Prepare and manage proposals for the conglomerate	5 proposals managed			
		Identify sources of soft financing	5 finance sources			
		Prepare and present requests to financial institutions	5 requests to finance sources			
		Negotiate advances for Fair Trade	1 Fair Trade negotiation			
	Processors obtain good nut quality	Validate energy alternatives for frying and baking	3 improved oven prototypes			
		Train producers in nut post-harvest	30% of producers trained			
		Guarantee a competitive price to producers	Consensus about fair price			
		Define a quality standard	1 standard for nut quality			

Table 7 continued 2

Item	Objectives	Activities	Indicators	2009	2010	2011
Commercialization	Commercia- lizers duly certified	Identify and select certifying companies	3 certification proposals			
		Manage resources for certification of producers and processors	2 proposals managed			
		Train producers in organic certification and fair trade process	30% of producers trained			
		Execute organic and fair trade certification	15% of organic producers certified			
			5% of producers Fair Trade certified			
	Commercia- lizers and products duly legalized	Identify requirements and steps to legalize companies and products	1 legalization guide			
		Establish covenants with Rights faculties of universities to decrease legalization costs	2 covenants			
		Manage resources for legalization	2 proposals managed			
	Stable markets are achieved	Elaborate a study of the organic nut market and fair trade	1 study on Organic Market and Fair Trade in USA and Europe			
		Elaborate a market study of 12 processed products in Tegucigalpa and San Pedro Sula	1 market study for processed products			
		Perform exploration trips in the markets	3 exploration trips			
		Negotiate and promote processed products in supermarkets	20 negotiations			
		Elaborate a marketing plan for processed products	1 marketing plan			
		Execute a marketing plan	Increase sales with 15%			
		Negotiate contracts or purchase intentions for organic almond and fair trade	3 contracts and / or purchase intentions			
		Negotiate cashew oil with hardware stores, industries and other	3 negotiations			
		Participate in fairs and Negotiation Rounds (Expoalimentos, FAO, Zamorano, FIES, Agritrade)	3 fairs			
Participate in patron's fairs	3 fairs					

Annexes

ANNEX 1. Matrices for Prioritization of problems in the items production, processing and commercialization.

PRIORITIZATION OF PROBLEMS IN PRODUCTION								
	Lack of economic resources	Prolonged drought	Sudden climate changes	Bad seed quality	Soil and crop plagues	Lack of technical support	Old plantations	Frequency
Lack of economic resources	3	drought	sudden changes	economic resources	economic resources	economic resources	economic resources	4
Prolonged drought	7		sudden changes	seed	plagues	technical support	Old plantations	1
Sudden climate changes	2			sudden changes	sudden changes	technical support	Old plantations	4
Bad seed quality	4				seed	technical support	seed	3
Soil and crop plagues	6					technical support	Old plantations	1
Lack of technical support	1						technical support	5
Old plantations	5							3

PRIORITIZATION OF PROBLEMS IN POST-HARVEST / PROCESSING						
	Bad quality of seed or nut	Inadequate infrastructure and processing equipment	Lack of knowledge of new processes on nuts and false fruit	Lack of materials and equipment for packaging	Lack of economic resources	Frequency
Bad quality of seed or nut	3	seed	new processes	seed	economic resources	2
Inadequate infrastructure and processing equipment	5		infrastructure	packaging	economic resources	1
Lack of knowledge on new processes for nuts and false fruit	1			new processes	new processes	3
Lack of materials and equipment for packaging	4				economic resources	1
Lack of economic resources	2					3

PRIORITIZATION OF PROBLEMS IN COMMERCIALIZATION					
	Lack of stable markets	Lack of knowledge on markets for the almond and by-products	Lack of certifications to enter specialized markets	Legal barriers to commercialize processed products	Frequency
Lack of stable markets	3	stable market	certifications	legal barriers	1
Lack of knowledge on markets for the almond and derivatives	4		lack of knowledge on markets	legal barriers	1
Lack of certifications to enter specialized markets	1			certifications	2
Legal barriers to commercialize processed products	2				2

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