

COMPETITOR ANALYSIS

CASSAVA IN CHINA

- Exports of cassava from Ghana reached only 450,000 USD in 2016. This was the lowest export value of the last five years. Out of the total Ghanaian exports, 37% went to China. This is equally to 166,000 USD in export value. Despite the low export value, Ghana still is the fifth largest export partner for China.
- Chinese imports are very concentrated, with only six export partners in 2016. Thailand and Vietnam are the dominant suppliers, together serving over 98% of the market. Especially trade from Thailand to China is very large, with over 1.1 billion USD exports in 2016. This is more than half of the total global trade.
- Total exports of Thailand reached close to 1.2 billion USD. Almost 97% of these exports went to China. Other Thai destinations included South Korea (25 million USD), Turkey (8.5 million USD) and Japan (2.8 million USD).
- There are no other West African countries supplying the Chinese market with cassava. Only African competitor in 2016 was Madagascar. Export value from the African island only reached 37,000 USD. Therewith, it is the sixth and smallest supplier of China. Only other export destination for Madagascar in 2016 was France. The export value to France amounted 15,000 USD.
- Other supplying countries in China are all located in South East Asia: Vietnam, Cambodia and Indonesia. China is the main destination for Vietnam (90%) and Indonesia (80%), while most of the Cambodian exports went to Thailand (94%).
- Vietnam and Cambodia are significant suppliers of cassava, both exporting between 250 and 300 million USD in 2016. Indonesia is a small exporter, with 5 million USD in 2016.
- Ghanaian exports to China just started in 2014. After reaching over 850,000 USD in export value in 2015, Ghanaian exports declined with -81% in 2016. This is in line with the general trend, as all suppliers realized negative average annual growth rates from 2012-2016.

Table 1 – import performance of main suppliers and regional suppliers in China

Supplier	Import value in 2016 (USD thousand)	Market share	Average annual growth 12-16	Annual growth 2016
Total	1,395,075	100%	-3%	-34%
Thailand	1,139,302	81.7%	0%	-33%
Vietnam	236,045	16.9%	-14%	-39%
Cambodia	15,482	1.1%	+31%	-30%
Indonesia	4,043	0.3%	-23%	-34%
Ghana	166	0%	-	-81%
Madagascar	37	0%	-	-26%

- Ghana holds an insignificant market share in the Chinese market, but it was still the fifth largest export partner in 2016.
- Madagascar is the only African competitor, with fewer exports than Ghana.
- The overall growth performance of cassava imports in China is quite negative. Combined with the fact that South East Asian countries are dominating supply in China, it seems more efficient to explore opportunities to other countries.

