جمهوری اسلامی افغانستان
وزارت تحصیلات عالی
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Islamic Republic of Afghanistan
Ministry of Higher Education
TABESH Institute of Higher Education

Nuts and Dried Fruit in Afghanistan

Agri-Food Supply Chains in Cross-Border Trade of Nuts and Dried Fruit

Quality--Food Safety-- Business Processes--Markets

Izmir – Turkey--1 to 3 July 2015--Hotel Hilton

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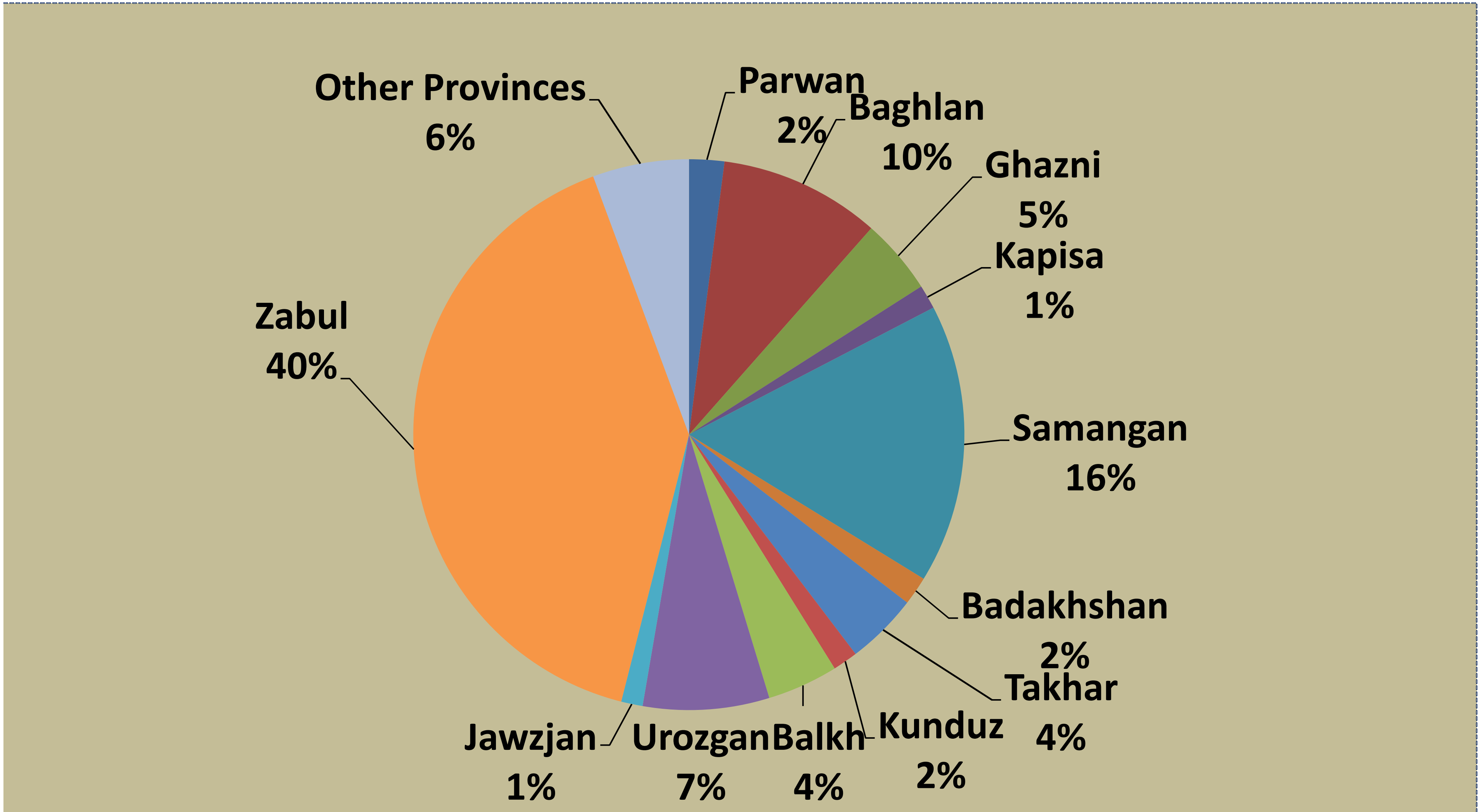
Overview of the nuts and dried fruit Industry in Afghanistan

There are various nuts and dried fruits produced and traded in Afghanistan (Northern Afghanistan).
The overall nuts segment of the Nuts & Dry Fruits mostly consists of **Almond, Pistachios, Walnuts, Dried Apricot, Dried Figs, Raisins.**

Major fruit that are dried include apricots, cherry, prunes, mulberries. In addition a sizable business activity of cumin seed collection also exist which are part of the nuts and dried fruit trading sub-sector.

Overview of the Nuts and dried fruit in Afghanistan



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Overview of Market

- Nuts and dried fruit are one of the major exported products categories of Afghanistan and is the second largest export remittance source after carpets and rugs.
- Total Export 2014 US$ 570 m
- Dry Fruits 2014 US$ 200 m
- Dry Fruits 2013 US$ 120 m
- Export increased 2014 46%
- Dry Fruits 2014 40%

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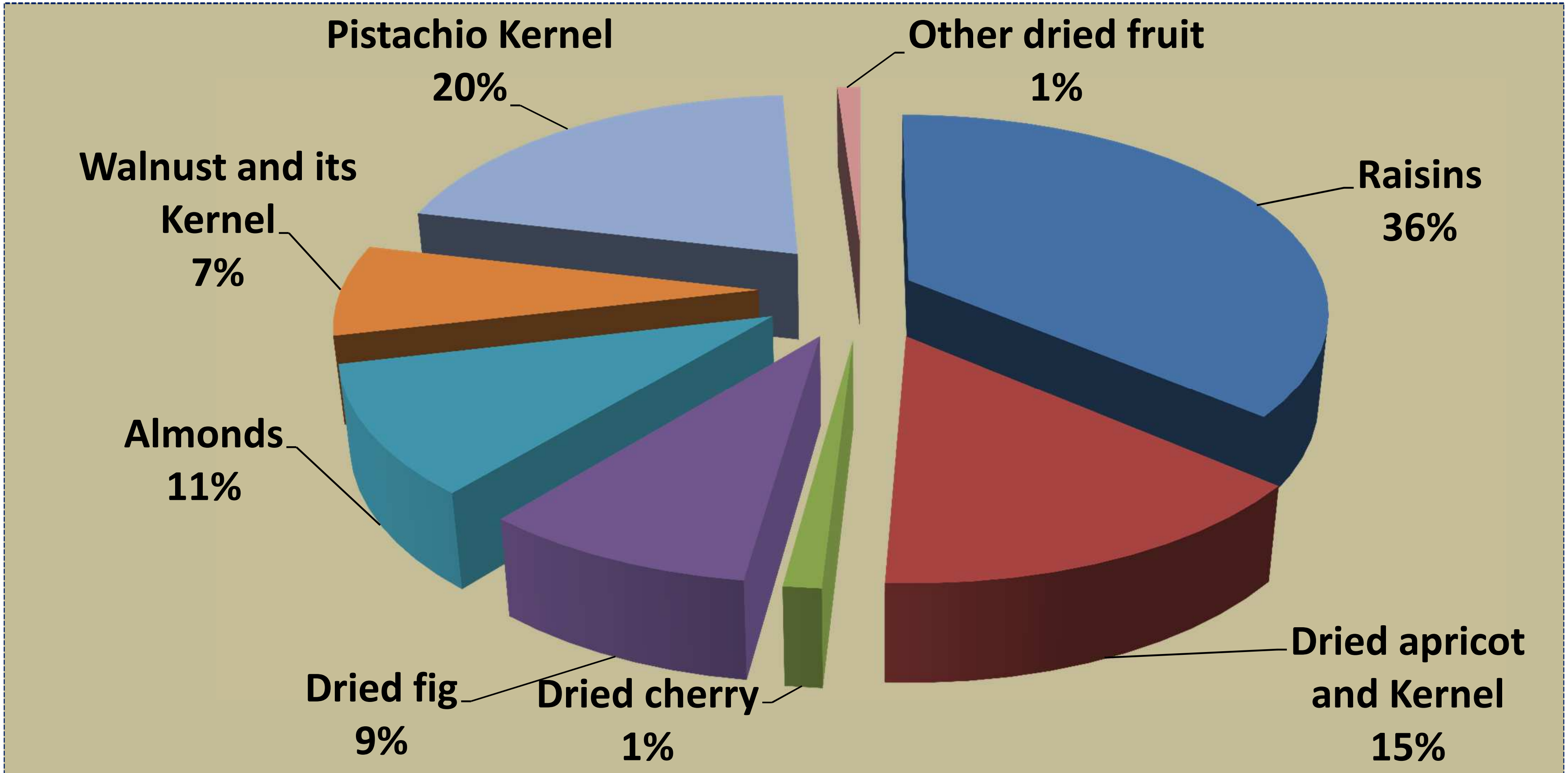
Export of Various Dried Fruit Product from Afghanistan - 2013



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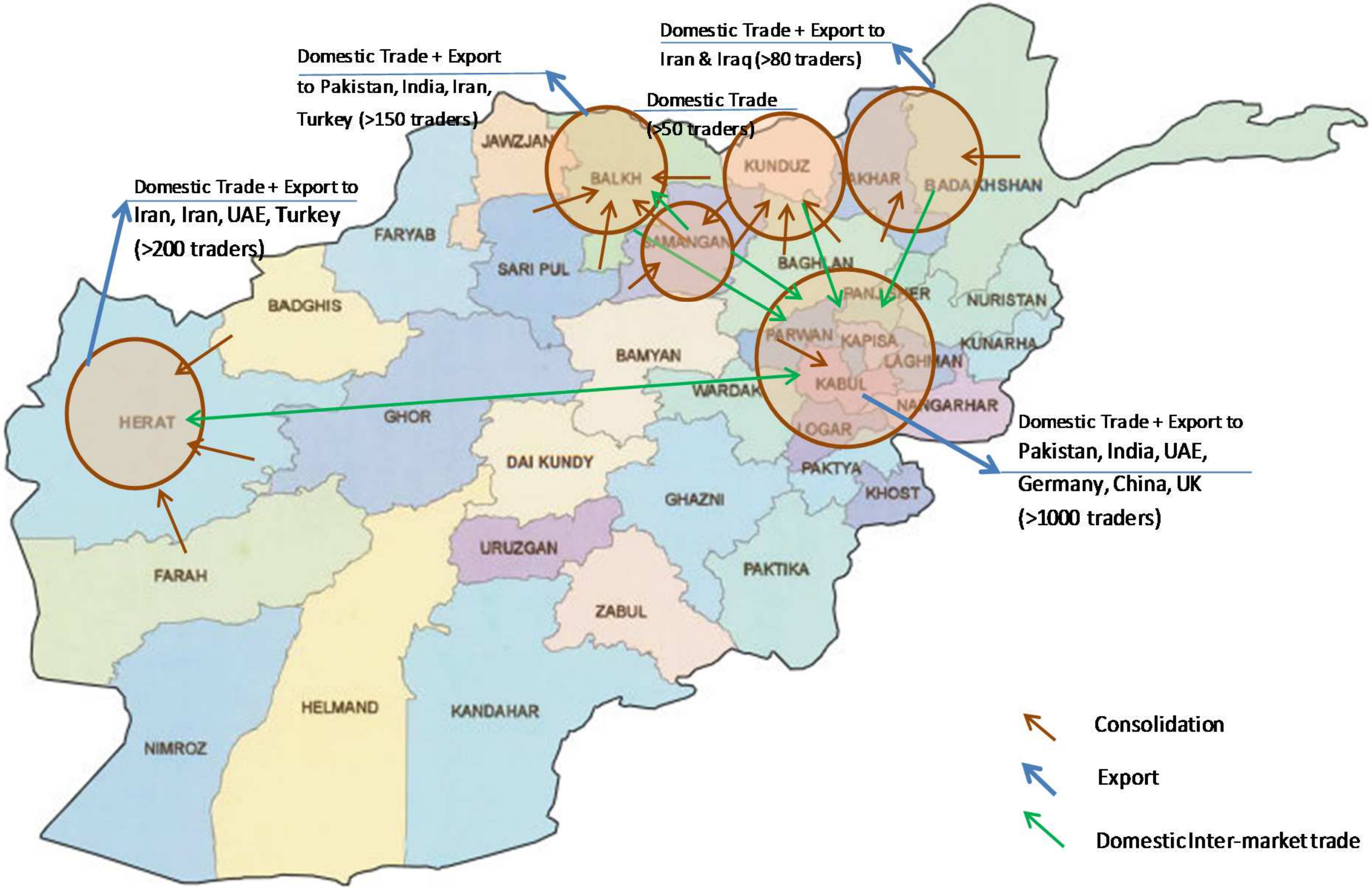
Overview of major exporting countries

Product	Countries Where Afghanistan is Exporting
Almond	Pakistan ,Iran ,Italy ,Turkey, UK, India ,Iraq ,UAE ,Germany, Saudi Arabia, Holland ,Canada,
Pistachios	India , Turkey , Lebanon ,Pakistan , Tajikistan ,Iran ,Urdon , UAE , Holland ,Iraq
Walnuts	Pakistan ,Iran ,Turkey, UK, India ,Iraq ,UAE ,Germany, Saudi Arabia, Holland ,Canada,
Dried Apricot	Iraq, Pakistan, India, UAE, Germany, China,
Dried Figs	India ,Pakistan ,Saudi Arabia , UAE, Canada, Germany, USA, UK, Belgium
Raisins	Russia ,UK, USA, Pakistan ,Turkey, Denmark, Saudi Arabia ,Canada, Check, new Zeeland , Australasia ,Poland , Germany. Litwania, Japan, Iraq, Belgium ,Brazil ,Indonesia
Prunes	India, Pakistan, Iran

Overview of the Internal Markets

- There is a sizable internal market for nuts and dried fruit in Afghanistan.
- Of the total produce 20% is consumed either at farm or in the local area.
- The remaining 80% is sold through the wholesale market system in Afghanistan with 20% - 70% exported depending upon the product. The produce is aggregated through different traders and several provincial wholesale markets before it reaches to the country’s biggest market in Kabul.

Inter-relationship of the wholesale markets of Northern Afghanistan is depicted in the following map.



The Value Chain Map and Relationships

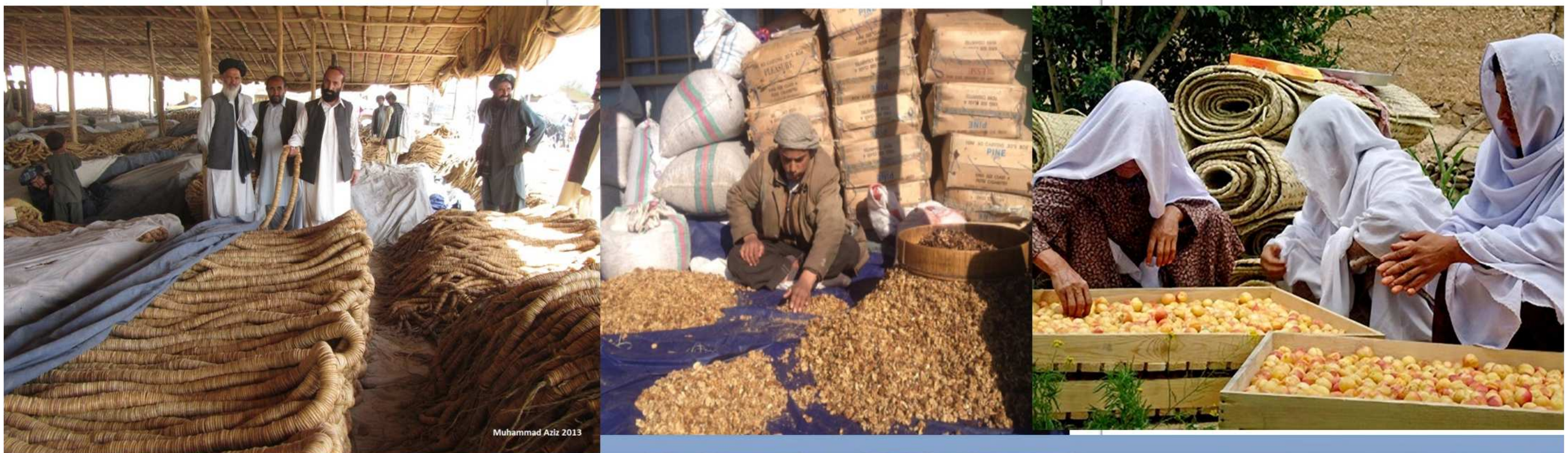
- **Value Chain Actors**
- The nuts and dried value chain consists of two major marketing channels .
- Domestic market channel;
- Export market channel.
- rural aggregators,
- wholesale traders in regional markets,
- wholesale traders in national markets,
- exporters,
- and retailers.

OPPORTUNITIES AND CONSTRAINTS

- The nuts and dried fruit value chains of Afghanistan can be reshaped to create higher value, become competitive and consistent suppliers to the major international markets. There are three different market options each one with different level of sophistication in the nuts and dried fruit value chain.

Export to high end market:

- Possible export to EU with high post-harvest care. However price should be competitive with US and other importing countries. This is a possible niche retail market for high value soft shell varieties such as satarbai and kaharbai, pistachios, walnut-kernel, raisins, figs and dried apricots could be candidates.
- This would require addressing quality certification requirements.



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Export to non-traditional markets – transit or processing hubs

- There are three potential processing hubs for nuts and dried fruits from Afghanistan i.e. Turkey, Iran Pakistan and Spain. This will require developing long term relationship between traders of Afghanistan and processors in such hubs. Once linked to the processing hubs, nuts and dried fruit of Afghan origin may qualify to enter into high end markets. The second type of hubs for dried fruit and nuts are the consolidation centers which are in UAE, Netherlands, Belgium and Germany. Afghan nuts and dried fruit needs to be linked to these hubs in order to get access to markets which these consolidation centers are serving with supplies.

Export to traditional regional markets

- These include Pakistan, India, Iraq, Iran and similar other smaller markets where Afghan traders are sending nuts and dried fruit. Value can be added by improving quality, improving packaging and through product differentiation in these existing markets. Afghan exporters can also collaborate with exporters in its traditional markets in order to take advantage of the processing facilities in these countries to prepare consignment for high end markets.

SWOT analysis -
Strengths and weaknesses or gaps in the agribusiness value chain

Strengths	Weaknesses
• Favourable conditions for fruits cultivation • Well-known in regional markets for its fruits’ unique taste • Abundance of high quality dried fruits and nuts	• Inconsistent supply and quality • High costs of raw products • Lack of formal value addition industries, poor packaging, sorting, grading and processing • Lack of diversified export buyers
Opportunities	**Threats**
• Formal Processing facilities • Developing more attractive, functional and consumer friendly packaging • Strengthening the “Produced in Afghanistan brand” • Sourcing new buyers – regional & international	• Failure to fulfil international quality certification standards and requirements, can jeopardize the development of the sector

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