An Almond Marketing Manual For Afghanistan: Key Concepts

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For Roots of Peace

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Executive Summary

The Almond industry of Afghanistan has promising opportunities to expand. This manual outlines the overarching principles and steps required for a successful and growing Almond industry. These principles then need to be applied by parties within country in the Afghanistan context.

This manual has three primary objectives 1) Heighten the awareness of Afghan producers, marketers and policy makers about global and regional Almond industry competition, 2) Outline the role of a national commodity organization and elements in its formation, and 3) Outline the process and critical issues required to develop a national development and marketing plan.

World Almond production and exports continue to grow in response to the growing demand for Almonds. Both old established markets and developing markets are showing strong growth in response to availability and acceptable pricing conditions. Within all markets, new innovative uses as well as traditional uses for Almonds should continue to drive demand higher as long as supply is available and prices remain attractive.

The Indian market for Almonds is growing and perhaps offers the best opportunity for Afghanistan to increase its exports. However, there is stiff competition from the United States and Australia for market share as demonstrated by the trend of a falling percent market share from Afghanistan.

Although there is Afghan Almond production information available, a more detailed inventory would greatly enhance the ability of growers, merchants, exporters and the government to plan production and marketing strategies. Additionally, it would allow existing customers and potential customers to measure Afghan Almond production capabilities and compare that to their individual market demands.

An analysis of product flow and product chain players, identifies who has and where are the opportunities to improve product quantity and quality and thus improve demand and marketing. To make progress in developing the Afghanistan Almond industry, there are five primary elements to address:

1. Product consistency
2. Product quality
3. Product inventory
4. Market knowledge
5. Promotion and market development

Required actions are outlined in the manual.

Afghanistan needs to develop a “complete” Almond Marketing Plan to maintain and enhance their competitiveness in the world Almond market.

Manual Objectives

This manual has three primary objectives:

1. Heighten the awareness of Afghan producers, marketers and policy makers about global and regional Almond industry competition,
2. Outline the role of a national commodity organization and elements in its formation, and
3. Outline the process and the critical issues to consider in developing a national development and marketing plan.

Competition:. The manual will highlight competition that the Afghan Almond industry faces in the form of products, packaging, and marketing techniques.

National Commodity Organizations: The manual will highlight the industry-level competition generated by industry development organizations such as the Almond Board of California (ABC) and the Almond Board of Australia. The manual describes some of the key factors that led to the creation of the ABC, such as the problems and opportunities that caused the California Almond producers and marketers to form the ABC and its key characteristics (e.g., funding, production enhancement programs (research), lobbying programs and marketing programs.

The manual describes the major actions that a National industry organization can take in developing a National Marketing Plan. Such a plan considers the development of the industry, government interaction, production programs, "value chain," programs and programs that are oriented toward increasing the sales of Afghan Almonds domestically and internationally.

National Development and Marketing Plan: The manual describes the requirements for a draft national marketing plan for the Afghan Almond industry that would be further developed and implemented by the Afghanistan National Organization (e.g., Afghan Almond Industry Development Organization (AAIDO)). The plan needs to consider industry level marketing, production planning and the roles of both the consumers and the government/regulators. California and Australia have developed such marketing plans that have enabled them to significantly enhance their position in the World Almond Market.

The manual addresses industry level development and marketing: i.e., what the industry should do as a group to promote the development of their industry and expand their presence in the world market.

1. The Global Almond Situation

1.1. Producers and Products

Total world Almond production is increasing dramatically (Table 1). Production has increased in volume by 43% (or 232,546 metric ton) in just 3 years from 2005-06 to 2007-08). The United States (California) dominates the global market producing 81% of the total world Almond Production in 2007. The top two producing countries (United States and Spain) account for 89% of the world production.

Table 1: World Almond Production and Major Almond Producers
(Metric Tons-Shelled Basis)

Location	Year		
	2005-06	**2006-07**	**2007-08**
World	541,681	649,772	774,227
United States	414,409	507,590	628,636
Spain	63,636	82,727	67,727
Australia	16,227	15,917	26,599
Turkey	15,045	14,209	15,545
Greece	14,045	15,045	14,045
Italy	12,045	6,000	12,045

Source*: Almond Board of California, Almond Board of Australia, USDA/FAS*

While the estimates of Afghan Almond production vary considerably with source, the Food and Agriculture Organization (FAO) estimated in-shell production at 31,481 metric tons in 2007[1]. Allowing for a 50% recovery after shelling gives a shelled production level of 15,740 metric tons. As such, Afghanistan, with approximately 2 % of the world production, is one of the top four Almond producing nations. These numbers would benefit from Afghan Ministry of Agriculture, Irrigation and Livestock verification.

Almonds are traded in multiple forms, beginning with in-shell and shelled forms. In-shell Almonds come in two types,

1. hard shell (completely closed shell, tools needed to open) and
2. paper shell (easily opened by hand).

Shelled Almonds can be sold whole and in two basic forms, brown skin (natural) and blanched. A wide array of processed products is then derived from these forms (Table 2).

Table 2: Shelled Almond Products

Almond form	Type of product				
	whole	**sliced**	**slivers**	**chopped**	**meal**
Natural	Yes	Yes	Yes	Yes	Yes
Blanched	Yes	Yes	Yes	Yes	Yes

In addition to these Almond products, Almond paste, butter and oil are also produced. In California, 75% of the 2007 crop was sold as shelled (natural), while 11% was sold in-shell. The remaining 14 % was processed further.

[1] FAO STAT: Food and Agricultural Organization (http://faostat.fao.org/site/339/default.aspx#ancor)

1.2. Buyers and Uses

In 2008/09 total world imports of Almonds were 429,935 metric tons. Just six countries account for 82.6 % of these imports - with imports exceeding 355,000 metric tons (Table 3).

Table 3: Top Six Almond Importers (metric tons) in 2008/09

Country	Imports (metric t)
EU-27	200,000
India	45,000
Hong Kong	40,000
United Arab Emirates	30,000
Japan	21,000
Canada	19,000
Top 6 Total	355,000

***Source**: United States Department of Agriculture/Foreign Agricultural Service; Tree Nuts: World Markets and Trade; Almond: 2009/10 Forecast Overview*

Total world imports of Almonds have increased 27.3% from 2006/07 to 2008/09 (Table 4).

Table 4: Total World Imports of Almonds (metric tons), 2006/07-2008/09

Year	Imports (metric t)
2006/07	337,842
2007/08	400,174
2008/09	429,935

***Source**: United States Department of Agriculture/Foreign Agricultural Service; Tree Nuts: World Markets and Trade; Almond: 2009/10 Forecast Overview*

Of special interest to world Almond producers and especially to Afghan Almond producers is the growth in the past year in the volume of Almonds imported by India. This market has grown 32.4% during the period of 2005/06 to 2008/09 and 14.5% growth in the past year alone (Table 5).

Table 5: Imports of Almonds by India (metric tons), 2005/06 to 2008/09

Year	Imports (metric t)
2005/06	34,000
2006/07	33,100
2007/08	39,300
2008/09	45,000

***Source:** United States Department of Agriculture/Foreign Agricultural Service; Tree Nuts: World Markets and Trade; Almond:2009/10 Forecast Overview*

Uses for Almonds are quite diversified. However, simplistically they can be categorized in two ways; snacks and components.

Snacks

Snacks tend to be eaten out of hand in both the in-shell and shelled forms. Below are the primary examples of pure Almond snacks:

1. Raw
2. Cooked/roasted/fried
3. Salted raw
4. Salted cooked
5. Flavored: either natural or artificially
6. Sliced, chopped and slivered in cooked, uncooked, salted, unsalted, flavored and unflavored

Components

When used as a component, Almonds are used either whole or they are further processed forms (Table 2). Below are examples of major component uses of Almonds:

Almonds can be used in a range of forms.

1. Confectionary: Almonds are used either whole or in a chopped form to meet the confectioners specifications
2. Dairy: Almonds are used in whole nut form and in a chopped or reduced size form. Products include ice cream, yoghurts and dairy drinks.
3. Bakery: Almonds are use in whole nut form as well as in a reduced size form. The Almond can be the primary component as well as one of many ingredients. The products can range from ready to eat products to mixes requiring further labor input.
4. Prepared foods and mixed product snacks: Prepackaged recipes for various dishes can have Almonds as an ingredient. The forms in which Almonds are utilized range from whole form to Almond meal to ingredients for snack food mixes.
5. Culinary: Culinary uses tend to be those found in home cooking as well as in the restaurant trade. Apart from confectionary, dairy and bakery use, Almonds can be utilized in main courses, salads and appetizers as well a in spice and marinade mixtures.

Total world domestic Almond consumption has increased by 35% over the past 5 years (Table 6). Of the top 6 Almond producing nations, all (with the exception of Japan) have shown strong growth despite world economic conditions. Indications show that strong growth will continue into 2009/10.

Table 6: Top 6 Almond Consuming Nations (metric tons) 2004/5-2008/9

Location	Year						
	2004/05	2005/06	2006/07	2007/08	2008/09	Growth	% Change
EU-27	258,700	271,500	280,000	289,300	290,000	31,300	12.10
United States	140,268	100,256	153,512	192,814	213,385	73,117	52.13
India	25,100	35,435	32,360	39,300	46,000	20,900	83.27
United Arab Emirates	14,000	9,600	14,900	19,800	30,000	16,000	114.29
Turkey	15,000	15,200	16,200	20,800	26,000	11,000	73.33
Japan	26,200	25,400	26,200	22,600	21,000	-5,200	-19.85
World	549,278	521,933	603,622	680,339	741,285	192,007	34.96

Source: United States Department of Agriculture/Foreign Agricultural Service; Tree Nuts: World Markets and Trade; Almond:2009/10 Forecast Overview

Summary
World Almond production and exports continue to grow in response to growing demand for Almonds. Both old established markets and developing markets are showing strong growth in response to availability and acceptable pricing conditions. Within all markets, new innovative uses as well as traditional uses for Almonds should continue to drive demand higher as long as supply is available and prices remain attractive.

2. Inventory of National Production

2.1. Varieties and Volumes

Total land area planted to Almonds in Afghanistan has been estimated at between 11,485 to 15,803 ha[2] (USAID RAMP estimates) with 2007 production estimated at 15,740 metric ton (shelled basis)[2]. There are an estimated 68 to 99 Almond genotypes found in Afghanistan [2 & 3]. These would include the named varieties and variants of the named varieties. There is variation between the spelling of the Almond varieties, depending on the language of the individual and his region. Below are some of the seemingly major varieties as mentioned during training in Afghanistan[4] and by Professor Samadi[2]. Alternate spelling(s) are included in brackets in some cases and highlight the nomenclature challenge which needs to be addressed (and which is discussed further in latter sections of the manual).

- Satar Bayee (Satar Bayi)
- Khairuddini (Khairuldini)
- Qahar Bayee (Gharhar Bayi)

[2] Sources: Professor Ghulam Samadi, Head Horticulture Department, Kabul University and FAO STAT: Food and Agricultural Organization (http://faostat.fao.org/site/339/default.aspx#ancor)

[3] Almond Industry Development Project Six Month Report, EC Perennial Horticultural Development Project (PHDP), European Union and Roots of Peace

[4] John Driver, Corwyn E. Lovin , International Programs Office/College of Agricultural and Environmental Sciences/University of California, Davis

- Qambari (Ghambari)
- Nakhshi (Sise) (Saizi?)
- Shokar Bayee (Shukar Bayi)
- Zareeri
- Abdul Wahedi
- Kap Mal
- Khaghazi
- Moravaja
- Sanghak
- Shakh Bozak
- Dasi

Turkish researches from the Horticulture Department, Faculty of Agriculture University of Harran listed 67 different genotypes in their study of Almond kernel characteristics[5].

Professor Samadi listed 11 major Almond producing provinces. However, there is no easily accessible public information on the production or varieties for Almonds from these individual provinces.

Data needs

In order to appropriately determine and inventory Almond varieties and volumes produced, Afghanistan should do the following on an annual basis:

1. **Nomenclature.** Develop an "official" nomenclature of the Almond varieties. This would be best listed in the established languages found in Afghanistan as well as the language of Afghan Almond consumers, both domestic and international.
2. **Production data.** Develop national as well as provincial production data on Almond varieties to include:
    a. Varieties
    b. Area produced
    c. Volumes produced
3. **Consumption.** Determine:
    a. Domestic consumption of Almonds (volumes and varieties)
    b. Varieties, volumes and destination of exported Almonds

Common genetic material delivers a more uniform product and results in greater profits. (Photo © UC Davis)

[5] Proceedings IVth IS on Pistachios and Almonds; Acta Hort. 726, ISHS 2006

Example data collection

As an example, both the Almond Board of California (http://www.Almondboard.com/Pages/default.aspx?redirect=false) and the Almond Board of Australia (http://www.australianAlmonds.com.au/) have excellent data of this type on their websites . The format and detail found on these sites greatly benefit customers and potential customers in determinedly availabilities of Almonds from these sources.

Summary
Although there is Afghan Almond production information available, a more detailed inventory would greatly enhance the ability of growers, merchants, exporters and government to plan production and marketing strategies. Additionally, it would allow existing customers and potential customers to measure Afghan Almond production capabilities and compare that to their individual market demands.

3. Inventory of Afghanistan Markets

3.1. Who Buys, What They Buy and Quantity

The principle market for Afghan Almonds is the domestic Afghanistan market. Almonds are purchased from 1) merchants in local markets and 2) markets located in urbanized areas and 3) from the growers directly. The Almonds are sold in both the in-shell and shelled form. Additionally, value added Almond products are utilized in a variety of bakery and culinary uses.

Determining accurate prices and distribution of sales in the Afghan Almond market is problematic at best. Negotiations are considered confidential and there is no official source of information. However, the Afghan consumer does prefer Almonds produced in Afghanistan.

The principle export markets are Pakistan and India; with India being the preferred market because of the potential for higher prices. In India, there is extensive use of Almonds as an ingredient in sweets as well as other culinary applications. The Indian market is growing very quickly (Table 5) with a growth of 32% over the past 5 years. Indications suggest that for the current year there will be at least 11% further growth in the market. India is presently the world's third largest consumer of Almonds, following the EU-27 and the United States. Afghan Almonds presently receive a "favored" status in India meaning an import duty concession of 50% as a result of the Indo-Afghan Preferential Trade Agreement (IAPTA). Pakistan, another market for Afghan Almonds, due to its proximity is not a preferred market for Afghan exporters. It is considered a low price market and a re-exporter of Afghanistan Almonds.

The mix of exporting nations supplying the Indian market has remained consistent over the past 5 years, with the United States being the dominant supplier. However, while the United States and Australia's share of the market has expanded, the market share for Iran and Afghanistan has diminished (Table 7). Overall, while the volume in the Indian market for United States Almonds grew 58%, the volume of Afghan Almonds dropped by 63%.

Table 7: Indian Imports of Almonds (metric t) from Major Suppliers: 2003-2007

Supplying Country	Year					% Change
	2003	2004	2005	2006	2007	
United States	21440	23937	18170	26577	33875	58
Iran	1180	727	770	990	795	-33
Australia	368	423	1020	2859	3233	779
Afghanistan	1566	1657	1640	495	582	-63

Source: United States Department of Agriculture/Foreign Agricultural Service/India Tree Nuts Annual 2004-2008

Table 8 indicates that the percent share of imports to the Indian markets contributed by the United States dropped minimally, the share contributed by both Iran and Afghanistan has dropped significantly. While Australia's increase in market share has been dramatic, increasing by almost 800%.

Variety selection and planting acreage should be driven by an understanding of market demand. (Photo © UC Davis)

Table 8: Percent share of Indian Almond Market Imports; 2003 versus 2007

	2003	2007
United States	87.19	84.69
Iran	4.80	1.99
Australia	1.50	8.08
Afghanistan	6.37	1.46

Source: United States Department of Agriculture/Foreign Agricultural Service/India Tree Nuts Annual 2004-2008

The prices from the Indian Delhi Markets indicate that the United States and Iran have been highly successful in obtaining the highest prices for the market, while the Afghan Almonds have shown good gains and the price for Australian product has dropped (Table 9). However, it should be noted that price data for Australia product has only been tracked for two years, not enough to establish a trend.

Table 9: Shelled Basis Wholesale Prices (RS/Kg) Delhi Market for US, Iran and Afghanistan, and Australia

	Year						%
Supplying Country	**2002/03**	**2003/04**	**2004/05**	**2005/06**	**2006/07**	**2007/08**	**Change**
California	254	296	407	392	431	380	49.61
Iran (Mamra)	510	575	750	825	725	875	71.57
Iran (Qumi)	300	387	475	475	450	375	25.00
Afghanistan (Gulbandi)	250	302	377	415	347	282	12.80
Australian	N/A	N/A	N/A	N/A	323	253	-21.67

Source: Australian Almond Statistics; Almond Board of Australia 2007 and 2008
United States Department of Agriculture/Foreign Agricultural Service/India Tree Nuts Annual 2004-2008

<u>Summary:</u>
There is a strong domestic market for Afghan Almonds within Afghanistan. It is however highly price responsive, with high prices resulting in drops in consumption. This pattern though may be more related to higher prices indicating a short crop and so the supply-demand relationship is maintained. Having a strong domestic market is an advantage to the Afghan Almond industry as it allows for a strong local consumptive base. The domestic market for Afghan Almonds consumes the vast majority of local supply - perhaps as high as 90% of the total supply. The domestic market is considered, by growers and merchants to be very competitive, with low margins and a very-price responsive market.

The international market for Afghan Almonds is limited to India, Pakistan and perhaps to a few of the Gulf States via transshipment through Pakistan. The Indian market is still a major importer of Afghan Almonds and the prices they receive are still stable. However, the Afghan share of the total Indian market is shrinking rapidly. It is obvious that the Afghan Almond is not maintaining its share of this rapidly growing market even though it is granted preferred reduced tariff status. It should be also noted that officially, there is no indication that Afghan Almond exports have moved beyond their traditional markets in India and Pakistan.

Key point: The Indian market for Almonds is growing and perhaps offers the best opportunity for Afghanistan to increase its exports. However, there is stiff competition from the United States and Australia for market share as demonstrated by the falling percent market share from Afghan.

4. Product Flow Description

4.1. Farm to Market: Players and Roles (Domestic and International)

Afghan Almonds flow through the market system in various ways and by various means. Almonds are grown by farmers, sold to merchants, who sell to exporter merchants to sell to importers. Packaging (if any) can occur at any level, but tends to be towards the later portion of the marketing chain. Individuals may indeed participate in more than one role. In general though, the players and their activities in the Afghan Almond marketing system can be described as follows:

Grower/Farmer: Produces Almonds by cultivating and caring for the Almond trees. Harvests the Almonds, removes the hull, placing them in large bag or sells them in bulk to merchants. If an aware grower, he will separate the varieties of Almonds into separate bags or lots.

Issue. Product consistency – variable tree stock and lack of nomenclature and standard genetic stock means variation in terms of product quality in terms of size and type.

Local Merchants: Purchases the Almonds in-shell from the grower, sorts the Almonds, removing inferior Almonds and if necessary, sorts the varieties of Almonds and then bags the nuts. The merchant may add value to the Almonds by shelling and storing the nuts and/or marketing the nuts to processors and consumers. The local merchant will also separate the nuts into lots, determining which nuts are sold to whom, for example, to local markets, regional markets or for export.

Issue: Lack of nomenclature and grades and standards means variable product quality in terms of size and type and standard packing containers.

Exporters: Consolidates Almonds from the local merchants and growers and sorts the nuts to segregate nuts of acceptable quality for the individual exports markets. The exporter determines which Almonds go to which export market. Value is added by shelling and sorting and packaging in a more suitable container.

Issue: Lack of nomenclature and grades and standards means variable product quality in terms of size and type. Variable and unknown product supply means variable and erratic supply to market; inadequate market knowledge.

Importers: First entity to take possession and store the Almonds outside of the country of origin. The importer will determine at which level the nut will move next, for example, retail, wholesale or manufacturing/processing. Importers individually and collectively determine the quantity and quality of Almonds entering the importing country. In the absence of an exporting nation's Almond organization, the importer is often the only representation that the exporting nation's product has within the importing nation.

Issue: Imported product must meet local demand in terms of consistent product quality, price and quantity. Importers will often have multiple suppliers to choose from to help meet their local market needs.

Common genetic materials and nomenclature and grades and standards are the basis for delivering better products to meet market demand. (Photo © UC Davis)

Distributors/wholesalers: The distributor moves the Almonds throughout the marketing chain. They match product with market.

Issue: Responding to local demand –product from importers must meet local demand in terms of consistent product quality, quantity and price.

Manufacturing/Processing: Activity that adds value and uniqueness to the Almond by changing its nature. It can be as simple as shelling, to roasting and adding flavors. Processors may also completely change the structure of the Almond to make slices, slivers, granules, flower, paste or oil. Bakery and culinary applications which include Almonds or Almond products into their final product are a form of manufacturing/processing activity. This activity often makes the Almond more suitable and marketable to consumers.

Issue: Responding to local demand – need market demand information to know demand in terms of product type, quantity and quality.

Retailers and retailing activities: The retailer presents the Almond or products containing Almonds to the consumer. The retailer determines where and how the nuts will be sold. Venues are quite diverse, including market stalls, small retail outlets, restaurants and bakeries, large supermarkets and mega-markets. Also service providers such as airlines, railways, sports and amusement parks, hospitals, schools and the military can participate in retail activities.

Issue: Responding to local demand –imported product must meet local demand in terms of consistent product quality.

Consumers: Consumers are the final participant in the marketing chain and the single most important. Although, previous activities can influence and affect the consumer it is the consumer that determines what they put in their mouth and the mouths of their dependents.

Issue: Consumers want consistent product quality at a price they are prepared to pay.

Issue: Consumers buy based on preference and price.

Summary
An analysis of product flow and product chain players identifies 1) who is involved and 2) where the opportunities exist to improve product quantity and quality and thus improve demand and marketing.

5. Assessment of Demand

5.1. Market Opportunities at Domestic and International Levels

The domestic market for Afghan Almonds is still a traditional market. It is often driven by price more than demand, i.e., if the price is acceptable, the consumer will purchase the Almond; if price is too high, they will reduce what they purchase. Such a price-driven market offers few options to stimulate demand other than lowering price. Most of these consumers obtain their Almonds through local merchants. The use of processed Almonds for bakery and culinary applications in Afghanistan occurs in both the rural/local and larger metropolitan areas. However, these applications are also price driven. There is a small middle-income group within Afghanistan that may grow. If growth in this economic group occurs, then these consumers with increased purchasing power could be targeted for higher value Almonds and value added products. Presently, there is some retail packaging and value-added products produced and consumed within Afghanistan. However, these domestic market options are very limited at this time.

The international market for Afghan Almonds is limited at this time to Pakistan, the Middle East gulf region and most importantly India. The Indian market recognizes and accepts Afghan Almonds, however the demand and market share for Afghan is decreasing (Tables 7 and 8). Even with this decreasing demand there are traditional buyers and consumers that recognize and demand the Afghan Almond, but their quality requirements must be met. The Indian market is one of the most rapidly expanding markets in the world, with a large middle income sector. They have demonstrated that they are consumers; however they demand products of quality to their specification. If their requirements are not met by their traditional suppliers they will search for supplier who will meet their specifications.

The Indian market is price conscious, with demand moving up and down with price; however they tend to reduce the amounts they purchase rather than abandon the product completely. There is important seasonal demand for Almonds, with specific applications where market entry dates (September – January) and quality must be made with precision[6].

The Pakistani market is considered a price market. They will search out the lowest price, with minimal consideration for quality. They do import nuts from Afghanistan and sort and package the product for re-export to India and the Middle East gulf countries.

Middle East Gulf countries such the United Arab Emirates are a significant market for Almonds for both internal use and re-export. As shown previously (Table 3), the United Arab Emirates is the fourth largest importer of Almonds in the 2008/09 season. In 2007/08 season they were the 6th largest importer of Almonds from the United States, importing approximately 20,454 metric tons[7].

Countries that have significant South Asian ethnic populations such as Singapore, Malaysia, The United Kingdom and the United States do offer an opportunity to market Afghan Almonds to individuals whose taste and memories reflect those of their ancestry. This is especially true for the first few generations of immigrants from India. These persons still demand foods and ingredients that are familiar to them; therefore, they may still have a preference for the distinctness of the Afghan Almond. However, the window of opportunity to make inroads into such markets diminishes with each generation.

Summary

The opportunities to expand the domestic market for Afghan Almonds are limited by the economic as well as the political status of Afghanistan. The market is not only limited by the purchasing power of the consumer, but also the geopolitical situation present in the country, which limits the distribution of the product throughout the country. This being said, Afghan consumers do prefer Afghan Almonds and if the product is affordable to them they will continue to demand the nut as well as other Afghan Almond products. Greater income of the Afghan consumer should increase demand.

There is still a viable export market for Afghan Almonds especially in India. However the Indian market is showing signs of resisting Afghan Almonds. Given favorable tariff rates for Afghan Almonds, it can be hypothesized that quality issues may be involved. Market share will continue to decease unless these quality issues are addressed and corrected. The competitive factors with India are increasing with the United States and Australia obtaining greater market share each year. Both Australia and the United States have emphasized the importance of the Indian market in their international marketing strategies[8]. In order for Afghan Almonds to maintain a differentiated position in the Indian marketplace, Afghan Almond industry participants must work to improve quality as well maintain the volume of Almonds entering the Indian market. If the consistency of Afghan Almond quality can be improved, there are indications that its market share will increase to at least immediate historic (2004) levels and continue to grow with further improvement to quality and supply.

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[6] United States Department of Agriculture/Foreign Agricultural Service/India Tree Nuts Annual 2004-2008

[7] 2008 Almond Almanac, Almond Board of California

[8] Strategic Plan: 2007-2012: Almond Board of Australia

Presently, there is no apparent marketing activity to develop markets beyond the traditional domestic Afghan market and South Asia (India and Pakistan) markets. Targeting markets that serve individuals of South Asian descent, could afford an opportunity to diversify the existing market.

Summary
The international market for Afghan Almonds is limited at this time to Pakistan, the middle East Gulf region and most importantly India, but there are opportunities to enhance market share.

6. Establishing an Industry Organization

6.1. Experiences from Other Countries

Within the United States of America, the California Almond Growers have established the Almond Board of California to represent and facilitate the growth of the California Almond Industry. The Almond Board of California created under United States Federal Law; the **Agricultural Marketing Agreement Act of 1937**. Under this provision, growers can request the United States department of Agriculture to issue a **Marketing Order** to:

1. Establish and maintain such orderly marketing conditions for agricultural commodities in interstate commerce (Section 2:1, Agricultural Marketing Agreement Act of 1937)
2. Establish and maintain such production research, marketing research and development projects (Section 2.3, Agricultural Marketing Agreement Act of 1937)
3. Establish and maintain an orderly flow of the supply thereof to market throughout its normal marketing season to avoid unreasonable fluctuations in supplies and price (Section 2.2, Agricultural Marketing Agreement Act of 1937)

The act further describes the procedures and requirements to establish a marketing order (Section 8; Agricultural Marketing Agreement Act of 1937).

Steps to Establish a Marketing Order

Taken from the "United States Department of Agriculture, Agricultural Marketing Service" Web Site:

http://www.ams.usda.gov/AMSv1.0/ams.fetchTemplateData.do?template=TemplateN&page=FVStepsinEstablishinganFVFederalMarketingOrder

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The industry meets to identify mutual marketing problems and determine whether a marketing order could help the industry solve these problems. During these discussions, USDA staff may help the industry identify marketing order authorities relevant to the industry's problems.

1. If there is general industry support for a program, a preliminary proposal is prepared by a steering committee of key industry people. Growers and shippers are included in discussions on the proposal.

2. A list of industry growers and handlers is developed by proponents. Next a request for a hearing on the proposal is sent to the Administrator of AMS. It should indicate the degree of *industry support, the problems the program would address, and suggest a possible hearing site and approximate date.*

3. AMS reviews the request and supporting documents, as well as any alternative proposals from interested parties. During this period, the staff of USDA is free to discuss the merits of elements included in any proposal with the industry.

4. A Notice of Public Hearing is then issued, and it is published at least 15 days before the hearing. USDA staff can comment only on procedural questions after this point.

5. A USDA Administrative Law Judge presides at the public hearing and a verbatim record is compiled of the testimony of opponents, proponents and others, including USDA personnel. Because proponents bear the burden of proof, they must present evidence to support the need for the program, and every provision in it. Briefs arguing for particular decisions may be filed with USDA after the hearing.

6. A recommended decision is issued by USDA based on hearing evidence. This is USDA's formal recommendation on the proposal. Persons are allowed to file exceptions to it for a set time period

7. After consideration of all exceptions to the recommended decision, USDA prepares a final decision. If it is favorable, a grower referendum is held on the proposal.

8. While producers are voting, copies of a companion marketing agreement are sent to handlers for their signature. Through their signatures on the agreement, handlers indicate their intention to abide by the terms of the program.

9. If at least two thirds of the growers voting by number or by volume approve the proposal, the Secretary of Agriculture issues the marketing order.

After proper procedures were followed the **Almond Board of California** was given quasi-governmental status by the United States Department of Agriculture to administer the grower-enacted Marketing Order 981, resulting in a combining of the Almond grower's financial resources to pursue their common interest. Five general goals were set as a framework for the **Almond Board of California**:

1. Promote the best quality Almonds
2. Expand the domestic and international market through generic public relations, advertising and nutritional research
3. Fund environmental and production research
4. Track Almond industry statistics
5. Publish the annual Almond Almanac

The **Almond Board of California** funds these activities with a mandatory assessment of US$.066 for every kilogram of Almonds (shelled basis) sold from California Almond farms. The board is directed by an elected ten member "Board of Directors" consisting of 5 Almond growers and 5 Almonds processors. These board members serve without compensation and represent the industry members by providing "strategic direction" and oversight of the funds of the **Almond Board of California** and to hire a professional staff to carry out the everyday activities.

Every five years the California Almond Producers are given an opportunity to either continue or terminate the Marketing Order empowering the **Almond Board of California.**

The success of the Almond Board of California can be measured in numerous ways, for example, in the past 20 years[9]:

1. The marketable crop of Almonds (shelled basis) produced in California has grown almost 150% from 267.5 million kilograms in 1988 to 661.4 million kilograms in 2008,
2. Average market price for Almonds (shelled basis) has grown 48% from US$2.31 per kilogram in 1988 to US$3.41 per kilogram in 2008,
3. The average yield of Almonds (shelled basis) in California has increased 60% from 1538 kg/hectare in 1988 to 2465 kg/hectare in 2008, and
4. The farm income derived from Almonds has increased by 142% from US$3436/hectare in 1988 to US$8301/hectare in 2008.

Other factors indicating the success of the Almond Board of California are:

1. During the last five years the United States per capita consumption for Almond has increased from 0.5 kg per capita to 0.6 kg per capita, and
2. The California Almond Industry continues to renew the marketing order which is now 59 years old.

6.2. Representation and Membership

How can the industry best be represented? In Afghanistan, there are approximately 11,485 hectares of Almonds spread over 11 provinces[10]. The Afghan Almond Industry Development Organization (AAIDO) has developed a national directory of 9,737 Almond growers, 182 nursery operators, and 253 Almond merchants[11]. There are multiple categories of industry participation in the Afghan Almond Industry. Certain individuals may function in just one category, while others may function in multiple categories.

Categories of Industry participants are:

1. Growers
2. Merchants
3. Exporters
4. Nurseries
5. Processors
6. Storage facilities
7. Government
8. University

Membership should be derived from the commercial sectors of the industry, i.e. those individuals who derive their livelihood from the production, processing and marketing of Afghan Almonds. Individuals from the government and university sector would not be

[9] Source: Almond Board of California website and USDA National Agricultural Statistical Service
[10] Professor Ghulam Samadi, Head of the Horticulture Department, Kabul University
[11] Almond Industry Development Project Six Month Report, EC Perennial Horticultural Development Project (PHDP), European Union and Roots of Peace, plus personal communication-Zach Lea.

members, but could serve effectively on the advisory committees. Categorically, the industry could be divided in two parts; part one, **production**; consisting of Almond growers and nurserymen and part two, **handling**; consisting of processors, storage facilities, merchants and exporters.

Summary
Membership of a national organization should be derived from the commercial sectors of the industry, i.e. those individuals who derive their livelihood from the production, processing and marketing of Afghan Almonds.

6.3. Organization Structure and Roles

The structure of any organization must be such that it can be effective and responsive to the needs of the industry it works for. Given there are approximately 11,485 hectares of Almonds over 11 provinces[12], the industry should be divided into 6 relatively equal regions - each representing approximately 2000 hectares of planted Almonds.

The organization should consist of a board of directors, professional staff and advisory committees consisting of industry members (Figure 1). The primary roles of the organization are to oversee and implement:

1. Marketing
2. Research (including assistance with arranging funding of research)
3. Legal aspects (including lobbying)
4. Administration (including funding activities to support the organization)

1. **Marketing**. Marketing refers to overall generic product promotion. The individual retailers, processors or exporters are responsible for their individual marketing plans to build off the organizations umbrella marketing efforts. However, the organization can identify and/or help develop local and regional marketing opportunities for their members to pursue.

2. **Research**. The organization ensures that priority topics involving both production and processing are identified and that adequate research is implemented to address these issues. The organization is responsible to either directly provide funding for research or lobbies decision makers to ensure industry research is adequately supported.

3. **Legal aspects**. The organization ensures that the industry is aware of any legal requirements associated with the industry. As such, the organization has to ensure the interests of the industry are well represented with the national and local decision makers. The organization works with decision makers to develop an enabling environment to encourage industry growth. Lobbying can cover all aspects of the industry from support for production practices to favorable marketing and export opportunities. Lobbying can also cover topics such as improved infrastructure for enhanced product movement.

4. **Administration**. The organization will have a number of industry administrative aspects to manage. In particular, funding mechanisms and industry statistics (to provide information for developing an enhanced marketing strategy) would be high priority items.

[12] Professor Ghulam Samadi, Head of the Horticulture Department, Kabul University

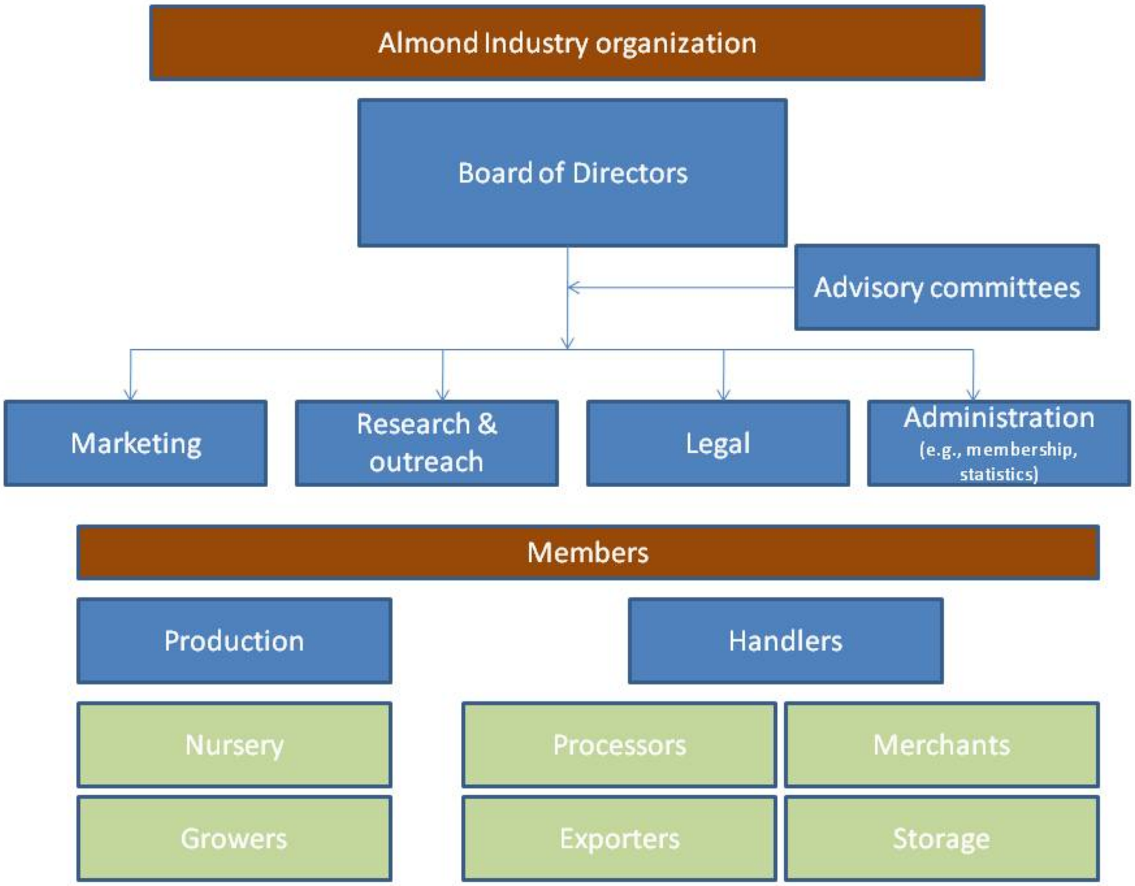

Figure 1: Idealized organization structure showing members and primary organization functions.

The board of directors should be elected from the membership (producers and handlers) in a manner that represents the Afghan Almond Industry. They should be elected in staggered terms so that all experience is not lost at once and new ideas are continually entering the board.

The responsibilities of the board are:

1. Establish policies
2. Set goals
3. Determine priorities
4. Approve budgets
5. Hire professional staff
6. Appoint individuals to advisory committees
7. Represent the organization to the public and private sectors

The total number of board members must be such that the Afghan Almond industry is adequately represented. However, the number must be kept at a level that allows for efficient function. It is recommended that the board consist of 12, two from each of the six Almond producing regions; six from the production side and six from the handling processing/merchant/exporter side. Each region will elect two board members: One from production and one from handling. Each member will have one vote. The board will select a chair from amongst themselves. The role of the chair is to act as the lead representative for the organization as well as manage the board meetings. The powers of the chair shall be equal to that of the other board members.

The role of <u>professional staff</u> is to implement the policies and goals of the <u>board of directors.</u> They manage the activities of the organization including:

1. Develop and maintain budgets
2. Manage programs and activities
3. Develop and manage communication systems, including publications, videos, websites, phones and written correspondence
4. Produce individual program and project reports as well as the annual report for the board of directors and the membership
5. Insure that organization rules and public sector laws are adhered to
6. Maintain organization membership list
7. Maintain Almond industry statistics
8. Support the board of directors and the advisory committees

The professional staff answers to the board of directors.

The “Advisory committees” provide advice to the “Board of Directors” and facilitate its abilities to make appropriate decisions. The committee tasks could include collection, assembly and evaluation of information. Additionally they could advise the board of courses of action based upon their consensus and interpretation of the data they have studied. These advisory committees can be enlisted from the organization membership, the organization’s professional staff, the public sector, educational institution and related private sector industries. Advisory committees should be formed based on need and dissolved when issues are satisfactorily addressed.

Summary
The industry should be divided into six relatively equal regions, representing approximately 2,000 hectares of planted Almonds. The primary roles the organization oversees and implements are: 1) Marketing, 2) Research, 3) Legal aspects (including lobbying) and 4) Administration (including funding and statistics collection).

6.4. Funding

In order for the organization to meet the needs and expectations of the Afghan Almond Industry, a source of funds must be secured. Funding of the organization could come from external sources such as the international community or the national or regional governments or the Almond industry as a whole could support their organization’s activities. If the membership chooses the self-funding option, it will need to determine the appropriate level of the assessment and at what point the assessment is collected. A logical point for collection would be a certain amount of money collected per kilogram sold, with the funds collected at the time the Almonds are sold to either the consumer or the importer.

7. Developing a National Market Plan

A National Marketing Plan utilizes statistical information on Almond production (including quantities, quality and varieties) in identifying:

- constraints and opportunities and
- potential solutions

The plan is used to maintain, develop and expand market position. Additionally, a market plan establishes a feedback mechanism for evaluating successes and on-going challenges and needs.

Both Australia and California have been successful in developing a marketing plan and then using that plan to enhances their market. Such a plan is required for Afghanistan.

Afghanistan has the climatic capability that allows it to produce a high quality Almond. Afghanistan also has indigenous varieties grown nowhere else and these varieties have a special position in the markets where they are present. Therefore Afghanistan has the basis for being a significant competitor in at least the Indian market, plus it has potential in other regions of the world that hold significant numbers of ethnic South Asians. However, the Afghan Almond Industry must initiate changes in how they grow, handle and market their product.

There are five key constraints inhibiting the Afghan Almond Industry (Figure 2). They are:

1. Product consistency
2. Product quality
3. Product Inventory
4. Market Knowledge
5. Promotion and Market Development

A National Marketing Plan will allow the Afghan Almond Industry to make better decisions to address constraints and to develop strategies to address opportunities.

This section reviews the major constraints and potential solutions to be considered in developing a national plan. A plan structure is then provided. This plan structure will then require local input and analysis as well as detailed study of existing and potential markets – both domestic and export – for the plan to be fully developed.

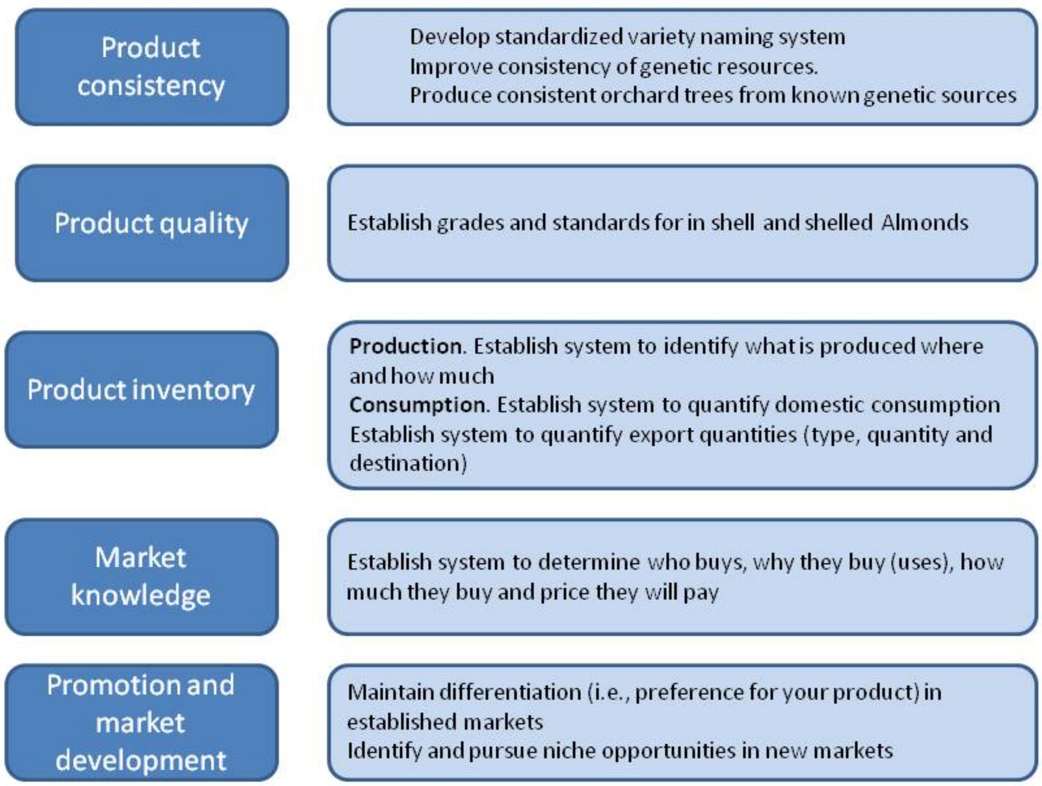

Figure 2: Major constraints and associated activities required to help the Afghanistan Almond Industry advance.

7.1. Product Consistency

Product consistency refers to consistently delivering a product of a known quality. Afghanistan requires an official standardized nomenclature for Almond varieties. The concept of "certified true-to-type trees" was reinforced recently (March 2009) through a UC Davis workshop and through associated activities of the Roots of Peace (ROP) project. There are two factors contributing to mixed product. Firstly, the lack of standardized nomenclature for Almond varieties and "true-to-type trees" means similar (but distinct) Almond genotypes can be mixed in the bags and boxes. Secondly, nuts are often mixed because marketers are not aware that keeping them separated is beneficial. The practice of selling mixed bags of nuts has a long history in Afghanistan. Regardless of the reason, Almond importers in most markets have come to rely on product consistency in the containers of Almonds they buy. If the Almonds they buy require sorting after arrival; they will greatly reduce price or flatly refuse delivery. Additionally, if the Almonds are not the nut they expected, they could also downgrade price or refuse delivery. If the problem continues, they usually find a more reliable supplier. Product "true-to-type" consistency is the basis to developing and maintaining customer loyalties.

Steps to resolution: The problem of product consistency can be rectified by addressing two factors. Firstly, establish and enforce a system of common nomenclature for varieties supported by a "certified true-to-type tree" nursery program with one official original (Generation One) tree for each named variety. The generation one tree would then be the source of all mother block trees (Generation Two) on the nurseries. All commercial production orchards would then have generation three trees, only two buds removed from the original generation one mother tree. Secondly, marketers need to be educated on the advantages on ensuring product consistency.

7.2. Product Quality

Product quality refers to the characteristics of the nut such as size, type, smell, etc.. The ability of a buyer to know in advance the quality of the product they are purchasing is a great advantage in planning market strategies and in maintaining market share. Buyers tend to not like surprises, especially ones such as the receipt of product that is of a lower quality than anticipated. When buyers are disappointed, they search for new suppliers or at minimum discount the value of the product and the region that supplies it. Afghan Almond industry merchants and vendors have described a number of defects presently found in Afghan Almonds including: bitternut, mixed nuts, mixed sizes, mold, shriveled nuts, mechanical damage and insect damage. These defects are reportedly found on a regular basis and require the merchant to resort to sorting which incurs costs and losses. As serious as this problem is for the local merchants, it is more serious for importer and international consumers of the product, because the distance and transport expenses have limited their options to remedy the situation profitably or with satisfaction. As markets become distant from the source of production, common terms defining the quality and thus the functionality of a product become imperative.

Terms that define the state or physical condition of a product in an official manner are called standards. Grades, which make up standards, describe what the product looks like and the state of usefulness to the buyer. Usefulness or functionality relate to value and the international business community has come to rely on standards, including official and industry standards, as one of the ways to determine the price they will pay for a product.

Example of the United States Grades and Standards for in-shell Almonds and shelled Almonds can be found at the United States Department of Agriculture/Agricultural Marketing Service website:

In-Shell Almonds: http://www.ams.usda.gov/AMSv1.0/getfile?dDocName=STELPRDC5050486
Shelled Almonds: http://www.ams.usda.gov/AMSv1.0/getfile?dDocName=STELPRDC5050487

Maintaining product quality requires that the product be packed in a container that best preserves the best quality aspects of the Almonds and Almond products. The method of packing needs to be consistent with standardized containers and standardized weights in those containers. These containers should clearly indicate the product inside, its quality standard or grade, the net weight and origin of the product.

Steps to resolution: The Afghan Almond industry has to develop a set of quality standards that they see as viable and enforceable. By establishing official standardized grades for Almonds, Almond industry participants are promising their clients that the product they buy is the product they have negotiated for. The industry should also adopt international standards for packaging and for product description. These practices will promote the reliability of the Afghan Almond industry as a supplier in providing the buyer with what is wanted and what they are paying for. It reduces the buyer’s risk, and so they will be return customers and they often are willing to pay a higher price for that guaranteed product.

7.3. Product Inventory

Product inventory refers to the knowledge of production volume, product quantities sold and carry-over stocks. Knowing with confidence what is produced and what is sold and consumed is valuable in determining production and marketing strategies. Knowing which Almond varieties are in demand and which varieties are over planted helps growers make better decisions when replanting an old orchard or developing new ones. When production data for the Almond varieties is available for each growing region, then growers can determine 1) which varieties do best in their region and 2) how those varieties do in other regions. Such data should include information on varieties grown, quantities planted and quantities harvested in each growing area. Growers who have this information can determine which varieties are more competitive for them, thus increasing their profit potential.

Consumption data is important in making informed decisions as it determines which varieties are in demand and how much consumers are utilizing. When the consumption data is segregated into individual domestic and export markets, Afghan Almond industry participants can make informed decisions in developing an effective marketing strategy.

Steps to resolution: Accurate and detailed information on product inventory and consumption is required to strengthen the Afghan Almond Industry. With concise reliable data, industry can make more effective decisions to improve their capabilities to reduce oversupplying and undersupplying their markets, thereby making them more competitive in the world Almond market.

Models of implementation

1. California. In California, production statistics are gathered by the federal government through a survey form sent to every grower and processor. Forms are collated at the county level and then aggregated to the State level to finally given national statistics. Consumption data is provided through a variety of governmental (e.g., USDA) and institutional sources (e.g., Almond Board of California).
2. Australia. Production data in Australia is collected directly by the Almond Board of Australia through an annual survey sent to growers.

7.4. Market Knowledge

Knowing your market is more than volumes sold and price received. Useful market knowledge includes an understanding of

1. Who your customers is,
2. Why they purchase your product,
3. What they do with your product,
4. How much will they use and
5. How much they will pay for a product.

Having knowledge pertaining to the consumer's requirements and desires will allow the Afghan Almond industry to modify their production, handling and transportation systems to better meet the consumer's expectations. This type of information will enhance the Afghan Almond industry's abilities to not only maintain but also expand their markets. When applied to new markets, it increases the industries chance of obtaining a market share in that market.

Steps to resolution: Developing market knowledge or intelligence first requires one to know who ultimately purchases and consumes Afghan Almonds and Almond products. It is not enough to know the importer and distributor, as they often have multiple sources, including sources from other Almond producing countries and their principle job is to supply product to their customers at a price acceptable to the buyer. It is crucial that the Afghan Almond industry representatives visit not only the importers but also the retail outlets where Afghan Almonds and Almond products are purchased and discuss directly with the consumers their uses for the product. An additional benefit to such visits to one's customer's retail establishments is knowledge pertaining to competitive products, in terms of both Almonds and other types of nuts.

7.5. Promotion and Market Development

Utilizing market knowledge in a strategic manner to enhance, expand existing markets and to open new markets is promotion and market development. It is the task of convincing a consumer that your product is the only one they want, so that they will purchase and consume it. It is the art and science of differentiating your product from all the other products that the consumer can and might purchase.

Promotion and marketing programs include the following:

1. Develop graphic written, electronic and visual media materials that expound to buyers and consumers the attributes and benefits of the Afghan Almond and Almond products. These materials should include descriptions of where the product originates and who grows it and include factors that emphasize uniqueness and even rarity.
2. Deliver programs that inform consumers about the characteristics of Afghan Almonds (including varieties produced) and how they can best be used in the consumer's kitchen.
3. Provide information as to product availability.
4. Relate stories that personalize the product to the customers. These include grower and cultural accounts that demonstrate the uniqueness of where the Almond comes from or benefits to the consumers.
5. Develop packaging that meets not only the needs of the buyer, but also attracts new buyers. A requirement here is that the product in its package is readily identifiable to the buyers, i.e., it stands out.
6. Promote the product by providing information about uses and culinary applications for the Afghan Almond, including the uniqueness of flavor and appearance.
7. Provide sample packages to be given out at retail establishments.
8. Develop and provide snack packets to distributed on airplanes and trains (e.g., National Airlines).
9. Develop exhibition booths that can be utilized in international food shows and exhibitions. These exhibits will include much of what has been discussed in items 1-8.

A draft market outline is shown in Section 7.6.

Steps to resolution:. Develop promotion and market programs to differentiate the Afghanistan Almond. The marketing group needs to **separate Afghanistan's Almond product(s) from their competitor's products in the eyes of the consumers in a positive manner.** Promote products as truly unique and make sure they meet the quality expectations of the consumer.

Additionally, maintain consistency in all aspects of the product delivered, including quality factors and condition of the product. Both the appropriate form and packaging (example shown in Figure 3) depends on the consumer quality and price preferences and thus market demand.

Figure 3: Professional packaging of a range of Almond products as presented by Blue Diamond ©. (Picture from http://www.bluediamond.com/).

Summary
Improving markets will be dependent upon 1) Product consistency, 2) Product quality, 3) Product Inventory, 4) Market Knowledge and 5) Promotion and Market Development

7.6. Market Plan Outline

The essential steps in developing a marketing plan are outlined below. The importance of these steps have been described above.

1. Identify production capacity. In particular, note
    a. Varieties
    b. Quantities produced, and
    c. Uses

2. Identify potential markets
    a. Establish whether the market is limited by supply or demand
    b. Determine
        i. Domestic and external market potential and the expected uses by market
        ii. Who buys what type of Almond,
        iii. What are the Almonds used for,
        iv. How much do people pay?

3. Set standards that can be enforced
    a. The Standards should include:
        i. Variety
        ii. Sizes

        iii. Quality (e.g., Skin damage, brokens, insect damage),
        iv. Uses,
        v. Further processing definitions: re: Blanching, slicing, slivers, etc..
        vi. Packaging/container elements for shipping
    b. Identify
        i. Who will set the standards?
        ii. How will they be enforced?
    c. Develop the standards using others (e.g., California Almonds) as a reference. Choose elements of standards that are locally relevant and enforceable.

The core of the plan for implementation

Develop your marketing strategy

Note: Strategy development is an iterative process requiring response to continued feedback

4. Determine changes needed
    a. Production
    b. Handling
    c. Identify how production can be consolidated
    d. Identify the key market players

5. Develop national entity responsible for
    a. Information management
        i. Inventory
        ii. Standards

6. Promotion
    a. Who will promote?
    b. What will be promoted?
    c. Who is the target group?

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- Professor Ghulam Samadi, Head of the Horticulture Department, Kabul University
- Hussain Sharifi, Junior Specialist, International Programs group of the College of Agricultural and Environmental Sciences, UC Davis
- Sierra Gold Nurseries, California

9. Information Resources

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