



USAID Revitalizing Agricultural Markets Program (RAMP)
 Afghanistan
 Trip Report on Potential Almond Markets in Central and East Asia
 March 2006

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Consulting Organization	Roots of Peace
Report Authors	Ned T. Ryan Thomas J. Payne
Abstract	This report is a trip report by the authors who traveled to India and the far east researching potential markets for Afghan almonds. Ned Ryan formerly head up the California Almond Marketing Board. Thomas Payne has significant experience involved in marketing Afghanistan agriculture products.

This publication was produced for review by the Chemonics International and USAID. It was prepared by Roots of Peace. The author's views expressed in this publication do not necessarily reflect the views of Chemonics International or USAID.



This trip report was produced by Roots of Peace under the USAID-funded RAMP Program under a subcontract to Chemoincs International. It was written by Ned T. Ryan and Thomas J. Payne, under the direction of JD Zach Lea, PhD. For more information, contact Roots of Peace at info@rootsofpeace.org or +1 415 455 8008.

Roots of Peace is a humanitarian, not-for-profit organization based in California, USA. Roots of Peace, established in 1997, focuses on post-conflict countries to eradicate remnants of war and to re-establish and promote economic livelihoods and social programs. Roots of Peace is funded by public and private sources.

ABBREVIATIONS

DAIL	Department of Agriculture, Irrigation, and Livestock
EC	European Community
HLP	Horticulture and Livestock Program
MAIL	Ministry of Agriculture, Irrigation, and Livestock
M&E	Monitoring and Evaluation
MRRD	Ministry for Rural Rehabilitation and Development
NGO	Non-Government Organization
PHDP	Perennial Horticulture Development Project
RAMP	USAID Revitalizing Agricultural Markets Program
ROP	Roots of Peace
TOT	Training of Trainers
USAID	United States Agency for International Development

WEIGHTS AND MEASURES

kg	kilogram (s)
ser	7 kilograms



ROOTS OF PEACE

Trade Mission Trip Report 14 – 31 March 2006

Visits: Mumbai, Bangalore & Delhi, India; Foshan & Guangzhou, China; Hong Kong; Seoul, Korea; Taipei, Taiwan.

Participants: Ned T. Ryan & Thomas J. Payne

Purpose: Promote Afghan almonds & raisins in South and East Asia. See consultant's terms of reference in ANNEX.

India—Delhi, Mumbai, Bangalore, Amritsar & Jammu:

Observations: India is the traditional market for Afghan nuts and dried fruits, accounting for a majority of the almond shipments. Indian people have affection for Afghan products, perceiving them to have better flavor, quality and nutritional value. Traditional shopping patterns are for daily shopping for fresh products in small stores and bazaars. For the consuming middle class, servants are available for shopping and meal preparation. Their traditional preference is for fresh unprocessed ingredients. Despite these customs, there is a trend developing of supermarkets and hyper stores. India's high duty for imported nuts and dried fruits coupled with a discounted duty for Afghan products result in a premium price paid to Afghan exporters for these products. This premium price makes the same products more difficult to sell in other export markets where the advantage of a duty differential does not exist. With India being the premium price market, it effectively captures the entire Afghan market until there is a surplus crop beyond what India can import. This is the situation today for almonds. Raisins, on the other hand, are in enough surplus that they are competitive on the world market.

Most importers have a history of importing Afghan almonds and dried fruits. Many have dropped Afghan products from their inventory over the past 30 years because of war and difficulties of consistent quality, transportation delays, thefts en route, and lack of sound banking. All importers now handle a greater amount of California almonds. Those still handling Afghan almonds say they represent 20% or less of their total almond handling. Because of quality concerns in warmer weather coupled with the long time required for the land transport across Pakistan and the slow border crossing into India, importers tend to stop importing after March and wait until new crop is available in October to import for the heavy nut use in the fall and winter and for the Diwali festival.

For almonds, this is a kernel market, however since the duty is lower for inshell almonds, many are imported inshell then shelled by hand in India by the importer. A small quantity of soft & hardshell almonds are sold to the consumer in the shell. The prices of Afghan almonds are similar to California almonds in the Indian market, but each price can move independently to some degree. Sometimes they sell at a discount; sometimes at a small premium for equivalent types.

For raisins, India is a market for green, red and black raisins. India has started producing its own green raisins because of high prices and shortages of supply in the past. Now the imports from Afghanistan must compete with local production. Other imports come from Turkey, Iran and other sources.

Afghan products come in as direct sales to Indian importers and as consignment sales with no price guaranteed and payment delayed until after sales are made. Importers that purchase directly claim it's difficult to compete with consignment sales because consignees can more readily lower the price when necessary to be competitive. Importers universally dislike the awahl system of money transfer and now make payments to Dubai banks and welcome the return of regular banking in Kabul. Supermarkets we visited are not ready to do direct importing, preferring to buy in local currency from local inventories for immediate delivery. Supermarkets sell prepackaged branded products and also pack their own label on site from bulk deliveries. Some almonds are sold raw; some roasted & salted in the supermarkets.

Contacts (see appendix for detail):

Balkishan & Co., importer, Mumbai
Brooks Trading Co. export/import, Dubai
Sharvari Consultancy & Trading, Phaltan, India
R. R. Trading Co., Mumbai
Chanchal Singh Pardhan Singh & Co., import/export, Mumbai
Kandhar Traders, importer of Afghan products, Mumbai
Tajir Pvt. Ltd., importer, packager, distributor, Mumbai
Food Bazaar, supermarket chain, Mumbai
Dolathram Thikamdas, import/export, Mumbai
National Commodity Exchange Ltd, Mumbai
Lubros Ineternational, import/export, Mumbai

Shivanditta Mal & Co.; Sindhwani Merchandise, importer, Delhi
Shiraj International, importer, Delhi & Amritsar
Shiv Ram Khanna & Sons, importer, Delhi
Fortune International, importer, Delhi
Bipan Trading Co., importer, Delhi
Hind International Co., importer, Delhi
Sukha Singh Swaran Singh, import/export, Delhi
Uttam Chand Sunder Lal, importer, Delhi
Rakesh Kumar & Co, importer, Delhi
Hind Kabul Co, importer, Delhi
R. R. International, importer, Delhi
Fairways Trading; Bajaj Overseas Impex, importer, Delhi & Amritsar
Om Prakash Arun Kumar, importer, Delhi
Uttam Chand Diwan Chand, importer, Delhi
BRB Bodh Raj Bhatia & Sons, importer, Delhi

VKC Nuts, producer, packager, export/import, Jammu, Kashmir

Opportunities: Until greater production and lower prices allow more Afghan products to move into other markets, we need to take advantage of the big existing market in India today as the primary export opportunity for Afghan products, especially almonds. In order to stay current with marketing trends, we need to promote packaging and sale of Afghan products in the new supermarkets. Often many of the packaged dried fruits and nuts in new supermarkets are from outside of India—Singapore, for example.

We need to work with Indian packagers to pack and promote the Afghan products now sold primarily in the independent stores and bazaars.

Some of the Indian importers expressed a desire to visit Afghanistan to meet with exporters and to see the production process. When I suggested a trade mission for a group of them, I was told the importers would prefer to visit individually. This is an opportunity to improve direct relationships. One importer suggested regular reports of prices and trade information from each producing area of Afghanistan—another opportunity for improved relationships.

China—Hong Kong, Foshan & Guangzhou; Taiwan-- Taipei:

Observations: For almonds, this is an inshell and a shelled market. Most nuts are sold as a snack, however there is a small confectionery and bakery industry use of almonds and almond products. Snack sales are almost all roasted and salted. Sales are made in small stores and bazaar settings, but also in a growing supermarket space. The market is very price sensitive and has shown a great deal of flexibility in the past, changing nut preferences according to price advantages. Inshell nuts must have a way to roast and salt the kernel, such as a split in the shell. Pistachios and other nuts have been hand split in China then soaked in a salt brine to get salt inside the shell around the kernel then roasted and packaged. Vacuum pack (2.5kg) is used to keep the roasted product fresh for the small stores until sale or display. The preference is for soft shell and easy open by hand nuts—peanuts, split inshell pistachios, soft shell almonds. The market will use hardshell almonds and even macadamias that have been split, if the price is competitive. Packers even provided a metal key to the consumer to open inshell macadamias. There is a consumer perception that the inshell roasted nut is more flavorful and nutritious than the shelled nut, accounting for part of the product preference. Taiwan is much less of an inshell market; has a similar kernel market and a more developed bakery and confectionery ingredient market.

Currently China's most popular nuts are inshell Iranian pistachios and Vietnamese cashew kernels, for reasons of price. California supplies almost all of the almonds, shipments of which peaked in 2003 then fell off in 2004 and 2005 crops because of increasing price. California pistachios and walnuts are imported when they are competitive with Iranian pistachios and Chinese walnuts, respectively. Last year, many inshell Oregon hazelnuts were imported because of high Turkish prices.

Raisins in the markets were Chinese green raisins, California sun dried, and dehydrated muscats.

There is a large industry in China's Guangdong province that cleans, sorts, hand cracks, salts and roasts nuts. This industry has been used to clean & sort raisins.

As with India, there is a history of small shops and bazaar sales of dried fruits and nuts, but supermarkets are becoming a more common source of these products. There they are packaged locally as well as in the exporting country.

Contacts:

Guangzhou Chengxing Nuts & Food, Guangzhou
Brilliant Light Trade, Guangzhou
Huang Wei Food Ltd, Guangzhou
Gao Nut Processing, Foshan, China

Leading Star Foods Ltd., Foshan
Garden Co. Ltd, Kowloon, Hong Kong
Sun Light Commodities, Ltd, Hong Kong
Sunway Enterprises Co, Hong Kong
CHK Trading Co., Hong Kong
Amy & Sons, Hong Kong
Sheng Hsiang Trading Co., Taipei, Taiwan
Sansoon Products Co Ltd., Taipei, Taiwan

Opportunities: Afghan almond opportunities will depend upon price. After last year's peak prices of California almonds, the trend has been downward with bigger crops expected annually in the future because of new plantings. The best opportunity today would be for low priced Afghan hardshell for inshell sales, if these nuts can be cracked (but remain in the shell) to enable salting the kernel inside the shell and hand opening by the consumer.

Raisin opportunities are for green, red and black raisins that can be cleaned and sorted in Afghanistan or in China to local standards. The Afghan imports will need to be price competitive with Chinese and other source raisins. When cleaned, they can be sold in the Southeast Asia and Middle Eastern markets.

Cross border trade from Eastern Afghanistan into Zhin Jiang Province in Western China is an opportunity for all commodities because the import duty is half of what it is for seaport imports—5% vs. 10% for some items. Green pistachios, soft shell pine kernels, almonds and raisins come in this way now. I don't know if there are any statistics on the size of the trade, but it needs to be investigated by Afghan exporters.

Ned T. Ryan

April 11, 2006

Indian importers of almonds, other tree nuts and dried fruit

Mumbai

<p>Charanbir Singh "Raja" & brother "Tony" Chanchal Singh Pardhan Singh & Co. Navi Mumbai 91-22-2766-5019 fax: 91-22-2766-5344 Tony cell: 98-2005-9059 Raja cell: 98-2003-9139 cspsco@rediffmail.com Calif almonds, dried fruit, spices, bronze powder</p>	<p>Dinesh R. Dang Kandhar Traders Navi Mumbai 91-22-2766-5035 fax: 91-22-2765-5910 dineshdang@hotmail.com Afghan nuts & dried fruit VP Mumbai Dry Fruits & Dates Assn.</p>
<p>Ali Asger Yusuf, Dir & CEO Muffadal Yusuf, Director Tajir Private Ltd Mumbai 91-22-2307-8776 fax: 91-22-2307-8761 aliasger@tajir.com BDG Calif almonds, prunes, hazelnuts, tea, coffee</p>	<p>Manesh Lund Lubros International Khand Bazaar, Mumbai 91-22-2343-4788 fax: 91-22-2341-1973 maneshlund@hotmail.com Dubai office: Arlund Enterprise</p>
<p>Shailesh Kharawala INDIAN KISMIS CO. Tel 91-22-2766-9447 F-27 APMC Market, Phase II Sector 19 (Mudi Bazaar) Navi Mumbai Mumbai, Maharashtra 400 703</p>	<p>Ashish Agrawal BALKISHAN & CO Navi Mumbai 91-22-2766-1968 / 6501 Ext 4325 Cell: 98-2026-7274) Fax 91-22-2369-3019 Agrawal.ash@gmail.com Ref: Naren Shrimanker, Dubai</p>
<p>Suniel Chabria DOLATHRAM THIKAMDAS Navi, Mumbai Tel 91-22-2766-6189 / 3098-3020 Fax 91-22-2765-7118 nationexim@hotmail.com President, Wholesale Market</p>	<p>Chetan Mehta WAGHJI LAKHMIDAS & CO. Mumbai, Maharashtra Tel 91-22-2342-0564 wala@bom3.vsnl.net.in</p>
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<p>Mr. Puran Singh SARDAR JAGJIT SINGH & SONS Mumbai, Maharashtra Tel 91-22-2342-4752 usalmond@bom3.vsnl.net.in</p>	<p>Mr. Bihari G. Ghura RADHA V. COMPANY Mumbai, Maharashtra Tel 91-22-2342-8489 radhavco@bom5.vsnl.net.in</p>

<p>Mukesh Dattani, Director THE AFRICAN TRADING CO. Mumbai, Maharashtra Tel 91-22-2766-2272 atc@giasbm01.vsnl.net.in</p>	<p>Suresh Dama J. LALJI & CO. Mumbai, Maharashtra Tel 91-22-2343-7866</p>
<p>A P Deshmukha, Business Head Shavari Consultancy & Trading Yash Udhhyoga Phattan, Dist. Satara, MS India 415523 91-2166-222593 fax: 91-2166-222583 Yash-udhyoga721@trade-india.com Rural area distribution</p>	<p>Arvind Chaudhary, Bus. Head Commod Fds Food Bazaar (Pantaloon Group) Knowledge House, Mumbai 91-22-5644-2200 /5553-1400 Fax: 91-22-5644-2201 Cell: 91-93-2402-9473 Arvind.chaudhary@pantaloon.com Supermarket chain; buy from importers</p>

Delhi

<p>Moti Lal Bhatia Raju Bhatia, Rakesh Bhatia, sons RAKESH KUMAR & CO. Tel 91-11-3954973 / 3962294 Res 91-11-6107761 / 6102387 Fax 91-11-6181746 / 3982836 Delhi rkcoin@ndf.vsnl.net.in</p>	<p>Mr. C.S. Kataria (Gurdeep S. Kataria) AJAX FOOD & ALLIED PVT. LMT Tel 91-11-2684-8865 New Delhi kataria@del2.vsnl.net.com</p>
<p>Sunder Lal Bhatia Rajesh (son USA), Kush, grandson UTTAM CHAND SUNDER LAL Tel 91-11-2397-5950 / 3976097 Fax 91-11-392-1777 Delhi sunderlalbhatia@hotmail.com importers exporters</p>	<p>Subhash Bathia Amit Bhatia, son Aman Bhatia (USA) UTTAM CHAND DIWAN CHAND Tel 91-11-2397-6160 Cell 98-1025-4799 Res 91-11-5163-9377 / 2921-9930 Fax 91-11-2921-0411 Delhi amit@bhatia.net amanbhatia@hotmail.com</p>
<p>Satish Chander Gandhi "Gulshan" BRB BODH RAJ BATHIA & SONS SATISH CHANDER GANDHI & CO. Tel 91-11-2391-5189 / 23989262/ (R) 2545-5668 Mob 93-1223-3302 Delhi bodhrajbhatia@hotmail.com</p>	<p>Mr. Kanwarjit Bajaj (Son Dinesh-Chico) FAIRWAYS TRADING COMPANY Tel 011-2391-3193 / 23913199 Fax 011-2394-1987 Mob 98-1005-6619 Delhi fairways@del3.vsnl.net.in almonds, dry fruit & cashews Amritsar Tel 018-3254-4110 / 253-4383 Fax 018-3254-2688 Res 222-3863 Majita Mandi, Amritsar</p>

<p>D. N Wadhwa (Mohnish father in law) FRONTIER TRADING COMPANY Tel 91-11-2294-3949 Delhi Afghan nuts, dried fruit</p>	<p>Dalip Arora (D N Wadhwa son in law) FORTUNE INTERNATIONAL Tel 91-11-2745-3883 / 2745-3884 Mob 98-1104-8295 Fax 91-11-2745-3882 / 23986533 Delhi ftcdk@yahoo.com</p>
<p>Jawahar Lal Wadhwa M/S HIND KABUL CO. Tel 91-11-2398-0295 / 2397-7544 Fax 91-11-2398-7540 Mob 98-1108-4762 Sales Office Delhi M/S KISHAN CHAND KAPIL KUMAR Tel 91-11-2355-0307 / 2351-7572</p>	<p>Satinder Mohan Wadhwa Ritesh Wadhwa (Bro J Lal Wadhwa) HIND INTERNATIONAL CO. KISHAN CHAND SATINDER MOHAN Tel 91-11-2393-7787 / 2392-7789 Fax 91-11-393-7787 Delhi Res 91-11-2361-6707 / 2362-0798 Cell 99-101-13228 rithint@ndf.vsnl.net.in</p>
<p>Ravi Khanna R.R. INTERNATIONAL Tel 91-11-5515-0357 / 2397-9467 / 2392-7874 Res 91-11-2433-7172 / 5515-0263 Fax 011-2392-7874 Mob 98-1002-7290 Delhi ramchandrajinderkumar@yahoo.com Afghan nuts, dry fruits, dates & spices</p>	<p>Manav Arora SHIRAJ INTERNATIONAL STAR IMPEX - SATYAM OVERSEAS shiraj@vsnl.com manav786@hotmail.com Tel 91-11-2392-7039 Fax 91-11-2399-4099 Cell 98-1063-5657 Res 91-11-5163-7299 Khari Baoli, Delhi</p> <p>Tel 254-4751 Res 222-1460 Fax 91-183-2546518 Majith Mandi, Amritsar</p>
<p>Dheeraj Sindhwani (Surinder, father) SINDHWANI (INDIA) MERCHANDISE Tel 91-11-2391-2965 / 2395-1256 / 2398-9301 Fax 91-11-2391-1404 Cell 91-98-9102-9255 Delhi Dheeraj@sindhwani.com Sidhwani@satyam.net.in</p>	<p>Tarun Kapoor, Director (Arun, father) O.A. ASSOCIATES Tel 91-11-2392-3616 / 2393-4728 Cell 93-1262-8711 Res 91-11- 274-9461 Delhi opak111@yahoo.com Dry fruit, kirana merchants/commission agent</p>
<p>Gunjan V. Jain, Director V.K.C. NUTS (P) LTD. Tel 91-1923-220292 / 222783 Fax 91-1923-220418 / 91-191-2433788 Cell 91-94191-86602 Jammu & Kashmir gunjan@vkcnut.com Walnut grower/packer; Importer, packaging</p>	<p>Kanwal Gakhar BIPAN TRADING COMPANY Tel (Res) 578-8657 Fax 91-11-291-5544 Cell 98-1006-3267 Delhi</p>

<p>J.S. Kataria HANS COMMERCE INTERNATIONAL Tel 91-11-2683-3385 New Delhi</p>	<p>Swaran Singh (Lucky) SUKHA SINGH SWARAN SINGH Tel 293-6577 Res 641-7386 Delhi</p>
<p>Mr. Uday chugh EXHILARON INDIA PVT. LTD Tel 91-11-2684-8095 New Delhi Info@exhilaron-india.com</p>	<p>Shyam Sunder Bansal NAF Khari Baoli, Delhi Tel 91-11-2395-4973 naf@vsnl.com</p>
<p>Puneet Gupta, Director L-COMPS & IMPEX (P) LTD. Tel 91-11-2628-7004 New Delhi puneet@lcomps.com</p>	<p>Mr. Satish Mehta MEHTA BROTHERS Tel 91-11-2371-2864 New Delhi</p>
<p>A.K Saigal SAIGAL TRADING CORPORATION Tel 91-11-2627-2240 / 5160-2202-5160-2201 / 2627-1227 Fax 91-11-2627-3975 Cell 98-1166-1191 Delhi saigalak@touchtelindia.net</p>	

Hong Kong & Guangzhou

<p>Ho, Ka</p> <p>SUN LIGHT COMMODITIES LIMITED SUN LIGHT TRADING CO. ESTER INTERNATIONAL LTD. Tel: 852-2880-0929 Fax: 852-2811-3711 Honk Kong sunlight@netvigator.com Nonp, Carmel, Peerless inshell Almonds Oregon Hazelnuts; Raisins</p>	<p>Chen, Hung Kay General Manager</p> <p>CHK TRADING CO. Ltd. Tel: 852-2850-8038 Fax: 852-2544-9288 Hong Kong hungkay@netvigator.com</p> <p>Importer; cleaning, cracking & sorting plants in Gunagzhou</p>
<p>Amy Wong</p> <p>AMY & SONS LTD. Tel: 852- 2568-7068 / 852-2976-0433 Fax: 852-2976-0199 / 852-2885-0030 Hong Kong amywong@driedfood.com.hk Dried Fruit & Nut import broker China Mobile: +86-13925156683 HK Mobile: +852-9818-1804</p>	<p>Chan Man Cheung Managing Director</p> <p>SUNWAY ENTERPRISES COMPANY Tel: 852-2548-8969 Fax: 852-2559-1835 Mob: 852-9189-6079 Hong Kong Exporter: Chinese Walnuts, Dried Ginger</p>
<p>Matilda CY Cheung Procurement Director</p> <p>Vivian C S Au Yeung Procurement Manager</p> <p>GARDEN Tel: 852-2360-3121 Fax: 852-2387-4344 Hong Kong Tel: 86-769-2464101 Fax: 86-769-2481731</p> <p>Southern China Office Tel: 86-514-7870750 Fax: 86-514-7865551 Eastern China Office yivianay@garden.com.hk mcycheung@garden.com.hk</p> <p>Commercial bakery; buy from importers</p>	<p>George P.Y. Chan Managing Director Mob: 86-137-0255-0911 gchan@leadingstarfood.com</p> <p>Kalvin Wong Import Manager Mob: 86-139-299-26260 86-137-274-24111 kalvin@pub.foshan.gd.cn</p> <p>LEADINGSTAR TRADING COMPANY Tel: 852-2803-7250 Fax: 852-2858-6734 Hong Kong www.leadingstarfood.com</p> <p>ZHONGXING FOODSTUFF HOLDING CO., LTD. Tel: (86-757) 86235722 / 86235766 Fax: (86-757) 86235766 www.zxnut.com , Foshan, Guangdong</p>

<p>Steven L. P. Wong Executive / Deputy General Manager</p> <p>WANJUN CORPORATION GROUP HUANG WEI FOOD LIMITED Tel: 020-82270085 020-31998101 Fax: 020 82295670 Mob: 13903000280 China www.shaber.com.cn stevenwong620315@hotmail.com</p> <p>Commercial bakeries; Shaber brand Feature USA ingredients; buy from importers</p>	
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Taiwan

<p>Richard Lee Import Manager</p> <p>SANSON PRODUCTS CO.,LTD. Tel: 886-2-2752-6422 Fax: 886-2-2752-6429 Mob: 0932398768 Taiwan snsn@ms22.hinet.net</p> <p>Import & distribution—Calif almonds</p>	<p>Scott Wang President</p> <p>SHENG HSIANG TRADING CO., LTD. Tel: 886-2-2515-0466 Fax: 886-2-2502-7900 Taiwan SHENGDIN@ms15.hinet.net</p> <p>Import & distribution to bakeries- Calif almonds & raisins</p>
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Dubai importers

<p>Shibu Mathews</p> <p>ABDULLA KHALIFA COMMERCIAL Tel: 2350972 Fax: 2350973 Mob: 050-4201268 Dubai akomme@emirates.net.ae Importers, Manufactures Representative, Commission Agents</p>	<p>Farid Habibi , Group Commercial Manager</p> <p>HASSANI GROUP OF COMPANIES Tel: +971-4-3471555 Ext: 203, 236 Fax: + 971-4-3474820 / 3475875 (Direct) Dubai Habibi@hassani.co.ae Roast, pack & distribution</p>
<p>Eng. Taha Freihat, Asst. General Manager</p> <p>BEST FOOD COMPANY L.L.C Tel: + 971-4-2857584 / +971-4-2859045 Fax: +971-4-2857976 Mob: +971-50-65-61506 Dubai www.bestfoodco.com factory_manager@bestfoodco.com Roast, pack, distribution</p>	<p>Naren Shrimanker</p> <p>RADSHRIMANCO L.L.C Tel: 221-2257 Fax: 221-1064 Mob: 050-645-3150 Dubai rad@emirates.net.ae Importer</p>
<p>Parsram Dhirani</p> <p>ROYAL GOLDEN TARDING Tel: +971-4-2263300 / Res 971-4-3598311 Direct: +971-4-2257657 Fax: +971-4-2263437 Mob: +971-50-64-51260 Dubai rgtdxb@emirates.net.ae Interest in Afghan dried fruits/nuts Importer, packaging</p>	<p>Riaz Hussain Bhojani, General Manager</p> <p>RASHWELL COMPANY L.L.C. Tel:+971-4-2262900 / 2262855 Fax:+971-4-2262337 Mob:+971-50-4590843 Res:+971-4-2211360 Dubai www.rashwell.com rashwell@emirates.net.ae Karachi & London offices</p>
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India Pricing model for California and Afghan Almonds:

Feb 2006 model	California Carmel Variety			Afghanistan Gorbandi/Sangi Variety		
	USD/lb	Rs/kg	Afs/kg	USD/lb	Rs/kg	Afs/kg
Grower price inshell				0.74	71	82
Grower price kernels	2.20	213	242	2.74	265	302
Processor price bulk	2.50	242	275			
Shipment to India	0.05	5	6	0.05	5	6
Indian duty & 4% CVD	0.69	67	76	0.33	32	36
Indian importer cost	3.24	314	357			
India wholesale market	3.34	330	367	4.18	405	462

Taipei, Taiwan Central Wholesale Market Prices

Calif Carmel Almonds	USD	12.81/kg
Rst /salted Inshell Nonp Alm		10.25
Rst/salted Inshell Pistachios		7.69
Cashews (Viet Nam)		8.45
Walnut halves (China)		7.17
Pepitas (pumpkin seeds)		4.61
Pine nuts (China)		16.91
Apricot kernels		4.10
Green raisins (China)		4.10
Sun dried raisins (Calif)		5.12
Dried Cranberries		12.30
Dried Cherries		11.27
4/4/2006		

DRAFT REPORT FILED BY TOM PAYNE

FR: Tom Payne
TO: Ned Ryan
RE: Afghan Almonds and Raisins
4/4/2006

During the month of March, I visited India, China and South Korea and devoted time to visit with traders and merchants concerning the potential for importation of Afghan almonds and raisins.

I will prepare a comprehensive report on this visit, but wanted to add the following brief observations:

India:

- Met with the old line traders in Delhi, Mumbai and Bangalore. I concur that they are well set in their dried fruit and nut supplies. In fact the domestic Maharashtra raisins are quite inexpensive (.35 per kg), and almonds far higher in price than the imported California almonds. In short, they know the way to Kandahar.
- A bright spot is the newly developing supermarket trade. I met with Food World and Milgiris in Bangalore as well as Big Bazaar in Mumbai. They are developing western style marketing systems, selling at western prices. They are re packing dried fruits and nuts under their own labels and selling to the affluent middle class. In fact, Nilgiris has just ordered their first load of dried blueberries and cranberries from the USA. They have the marketing savvy to differentiate products from Afghanistan and market at a premium. I will add these names to the end of this report.

Korea:

Traders are well set with raisins and almonds from California. But they also are curious and interested in Afghan products. There is a special relationship between Korea and Central Asia due to the large population of Koreans that live in the region since times when Stalin relocated them in Soviet times. Korean trading companies have an idea that Afghan products are superior and more pure than other regions. And, this can be exploited in marketing efforts.

China:

I visited dried fruit and nut importers as well as fresh fruit importers in Guangzhou South China. I believe there is potential for import of pomegranates, but they are already well served by Western Chinese suppliers of pomegranates. Inshell almonds are not a big deal yet in China, yet the roasting trade for almonds appreciates mainly larger sized almonds.

Contacts: See collection of business cards below.

CHANCHAL SINGH PARDHAN SINGH & CO.
 IMPORTERS OF DRY FRUITS, SPICES & BRONZE POWDER

CHARANBIR SINGH
"Raja"

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 Navi Mumbai - 400 705.
 Tel.: 2766 5019 / 2766 50 20
 Fax : 91-22-2766 5344
 Email : cspscsco@rediffmail.com



NAJMUS SHAHADAT HOSSAIN (Shamim)
 MBA.ACCA,
 Managing Director




NAJMUS COMPANY LTD.

Tel : 880-2-9880769, Fax : 880-2-8823356
 Cell : 880-189268013
 E-mail : najmuscompany@hotmail.com

Import. Export and Marketing Concern

Importer of foods to Bangladesh.

Deepak Gidwani
 (Managing Director)



JFC International

B-153, NEW FRUIT MARKET,
 AZADPUR, DELHI-110033
 TEL. (91-11) 27251665, 27446267
 FAX (91-11) 27408806
 M.P. (91) 9810099383 9873102223
 E-mail : ifcint@hotmail.com

Ajoy Krishnamurti
 Chief Executive Officer




Tel: 91-22-24914060
 91-22-24938127
 91-22-24937342
 91-22-24934634
 Fax: 91-22-24933204

sankalp retail value stores pvt. ltd
 108/109, nav neelam bldg, r. g. thadani marg,
 worli, mumbai - 400 030. india
 e-mail : ajoyk@mydollarstoreindia.com

Fruit importer
 packs.

Run retail outlets. Aggressive. Consumer



TAJIR PRIVATE LIMITED

Ali Asger Yusuf
Director & CEO

Adie Mansion,
334, M. Shaukatali Road,
Mumbai 400007 India.

Tel 91-22-23010446, 23078776, 23090244
Fax 91-22-23078761
Email aliasger@tajir.com

www.tajir.com

GOPAL RAI SRI RAM (P) LTD.

(Established : 1902)

Amit Jain
Director

Consultants for Procurement of Rice, Wheat &
Govt. Tenders

K33A, Green Park Main, New Delhi-16 (INDIA)
Tel. : 91+11+23978989, 23914744
Mob. : 91+9312280369 Fax : 91+11+26965269
E-mail : indgovt@hotmail.com

Blue Diamond importer.

FOOD BAZAAR

WHOLESALE PRICES

ARVIND CHAUDHARY
BUSINESS HEAD - COMMODITY FOODS

Knowledge House, Shyam Nagar, Off Jogeshwari-Vikhroli Link Rd.,
Jogeshwari (E), Mumbai - 400060, India.
Tel. : 022 56442200, 55531400 Fax: 022 - 56442201
Email : arvind.chaudhary@pantaloon.com Mobile : 9324029473

A PANTALOONS KNOWLEDGE GROUP COMPANY

Atul Khanna
Director Operations



Optimum Marketing Metrics Pvt. Ltd.

D-113, Okhla Industrial Area, Phase I,
New Delhi - 110 020
Tel. : +91-11-5100 0034-35-36 Cell : 9810059597 Fax : +91-11-5100 0037
Email: atul@ommindia.biz • atul.khanna@rediffmail.com
Website: www.ommindia.biz • www.ommindia.com

**PANTALOON
RETAIL (INDIA) LIMITED**



AVINASH JOSHI
SENIOR MANAGER - FOOD BAZAAR

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Tel. : 022 56442200, 55531400 Fax: 022 - 56442201
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C. GOPALAKRISHNAN
Managing Director

NILGIRIS FRANCHISE PVT. LTD.
ADMINISTRATIVE OFFICE : 404/A, 2nd CROSS, 8th MAIN, 3rd BLOCK,
KORAMANGALA, BANGALORE - 560 034, INDIA
☎ 2552 7124 / 2550 6705 (D) 2552 7440 Fax: 2552 7125
e-mail : nilgiris1905@vsnl.com ; cgopal@bgl.vsnl.net.in
WEBSITE : www.nilgiris1905.com ; www.nilgirisonline.com


Established chain store, bought USA berries.




Crystal Bangladesh Supports (Pvt.) Ltd.

EHETASAMUL HAQUE ZIA
Managing Director

9 Abbas Garden, Mohakhali
Dhaka-1206, Bangladesh.
Phone : 8753321, 8753409, 9895744
Fax : 88-02-9890164
Mobile : 011802228
E-mail : crystalbd@accessstel.net



G.S. Gill, Country Manager
+91(98113)09932
gsgill@deltapineindia.com



Deltapine India Seed Pvt. Ltd.
(A subsidiary to Delta and Pine Land Company, USA)
K-3/17 DLF Phase II, Gurgaon (HR)
New Delhi Metro, INDIA 122 002
Ph: +91(124)504-4401 • Fax: +91(124)504-4402

Dinesh R. Dang



KANDHAR TRADERS

Dry Fruits, Nuts & Spices

Mumbai Office :

Mulratna, Narshi Natha Street,
Ground Floor, Katha Bazar,
Mumbai - 400 009.

Tel.: (022) 2342 5786, 2342 8408.

Navi Mumbai Office :

Shop No. F - 51, APMC Market - 1, Phase - 2
Vashi, Navi Mumbai - 400 705.

Tel.: (022) 2766 5035, 2766 5059

Fax : (022) 2765 5910.

Email : dineshdang@hotmail.com

Active in Afghan for decades.

Dheeraj Sindhvani

SDM

SINDHWANI (INDIA) MERCHANDISE

An Import Export Enterprise

439, Katra Maidgren. Khari Baoli, Delhi-6 (India)

Ph.: +91-11-2391 29 65, 2395 12 56, 2398 93 01

Fax.: +91-11-23911404, Cell: 91-9891029255

E-Mail : Dheeraj@sindhvani.com

Sindhvani@satyam.net.in

FOODWORLD

**Dairy
Farm**

Dilpreet Singh Mehta

Category Manager

Foodworld Supermarkets Limited

No. 740, Eswari Industrial Estate
Gate No. 2, Hulimavu, Bannerghatta Road
Bangalore - 560 076, India
E-mail : dil@foodworld.in

Tel : +91 80 51109702-709

Fax : +91 80 51109710

Mobile : +91 98861 97887

A member of the Dairy Farm Group

SUNIEL CHABRIA



DOLATHRAM THIKAMDAS

F-45/46, A.P.M.C. MARKET-I,
PHASE - II, SECTOR-19,
NAVI MUMBAI - 400 705 (INDIA)

FAX : 2765 7118

TEL : 2766 6189 / 3098 3020

Email : nationexim@hotmail.com

EXPORTERS & IMPORTERS OF AGRI PRODUCTS

Gurdip Singh
Chief Executive



9911211999

GSI Associates
C - 8 / 8177 Ground Floor
Vasant Kunj, New Delhi - 110070, India
Phone : 91 11 51767444, 30913112
Fax : 91 11 26132375
Mobile : 9810268147
E-mail : asia@vsnl.net

Rajesh Poddar
Director



-

**R. R. TRADING
COMPANY**

108, Jolly Bhavan No. 1,
New Marine Lines,
Mumbai - 400 020 (INDIA).

Tel. : (91-22) 2200 1411 / 2200 7387
Fax : (91-22) 2200 7359
Email : rrtradingco@vsnl.net

Lalit Asrani



Rodaa Ji Company

1st Floor, GI-30, Main G.T. Karnal Road,
Industrial Area, Delhi-33 (INDIA)

Ph. : 91-11-30978964, 30988607, 91-98-100-16425
Fax : 91-11-27111906 Mobilefax : 91-98-181-42101
E-mail : rodaajicompany@yahoo.co.in

METRO

Cash & Carry India

Michael Keelan

Director
Buying & Merchandising - Food

METRO Cash & Carry India Pvt. Ltd. Survey No 26/3, 'A' Block Ward no 9, Industrial Suburbs, Subramanyanagar, Bangalore - 560 055. India	Tel 91-80-22192000 Extn.2241 Direct 91-80-22192241 Fax 91-80-22192240 Mobile 98451 38633 Email michael.keelan@metro.co.in
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Member of METRO Group

Fresh fruit importer.

Uday K. Chugh
MD



Exhilaron India Pvt. Ltd.
Exporters & Importers

211, Antriksh Bhawan, 22 K.G. Marg, New Delhi 110 001, INDIA


Ph. : +91 11 2373 0971, 3091 2063 (D) Fax : +91 11 2373 0972
Mobile : +91 98 100 16424 E-mail : info@exhilaron-india.com


Sara Carriere



SAKSHAM IMPEX PVT. LTD.
321-S, Ground Floor, Chirag Dilli,
New Delhi-110017. INDIA.
Tel : +91 11 51630336, 55657714.
Fax : +91 11 51664819.
Mobile: 9871176383
email : ashish@sakshamimpex.com
website : www.monin.com

Will be largest grocery chain in India. HK owned. Singapore managed. Good prospect for pomegranates, almonds.






S. Srinath
Operations Director

Foodworld Supermarkets Limited No. 740, Eswari Industrial Estate Gate No. 2, Hulimavu, Bannerghatta Road Bangalore - 560 076, India E-mail : srinath@foodworld.in	Tel : +91 80 51109702-709 Extn : 218 DID : +91 80 51503461 Fax : +91 80 51109710 Mobile : +91 98442 44044
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Robert Tjan
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A member of the Dairy Farm Group

Cell : +91-9820200884

SANJIV GULATI
GENERAL MANAGER



IG International

s.gulati@sify.com

Largest fruit importer in India. Apples,



Cash & Carry India

Sarangam Rameshmoorthy

Manager - Buying & Merchandising - Food
Fruits / Vegetables

METRO Cash & Carry India Pvt. Ltd. Survey No 26/3, 'A' Block Ward no 9, Industrial Suburbs, Subramanyanagar, Bangalore - 560 055, India	Tel 91-80-22192000 Extn.2255 Direct 91-80-22192255 Fax 91-80-22192249 Mobile 98806 43265 rameshmoorthy.sarangam@metro.co.in
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Member of METRO Group

Currently cannot import produce but will soon.
 Import almonds currently. Interested in inshell
 Afghan consumer pack.

Photos from ROP Trade Trip to Indian, China and Taiwan March 2006



Food Bazaar Hyper Store in Delhi



Dheeraj Sindhvani at Big Bazaar in Delhi



Food Store Food Bazaar in Delhi



Roasted Pistachios and Almonds



Green raisins from India



Cashews & Almonds at Food Bazaar Store in Delhi



Afghan almond kernels in India. Two varieties-- Khagzi & Ghorbandi



California almonds and Indian cashews in Indian food store.



Calif soft shell & Afghan hard shell almonds in Delhi



Green raisins with Afghan Almonds & Indian Cashews



Indian packager Haldiram's at Food Bazaar in Mumbai



Khari Baoli Wholesale Market Delhi at dusk



Kush Bhatia (center) with customers in Khari Baoli office of grandfather Sunder Lal Bhatia



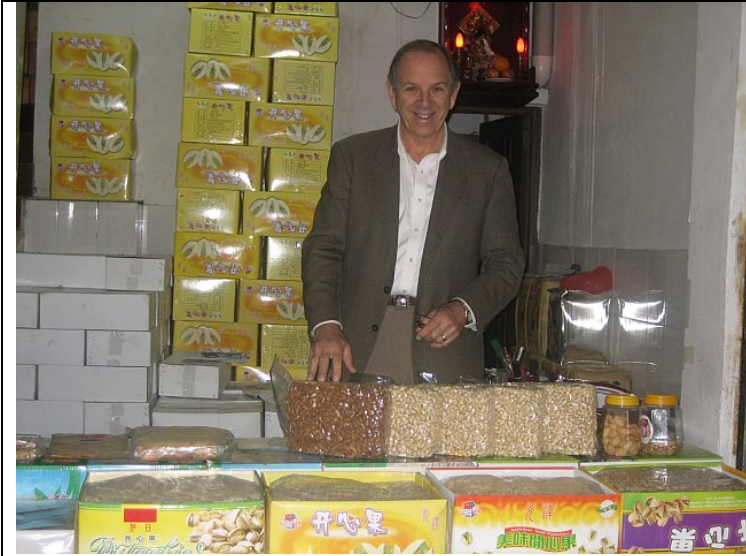
Ned with Manav Arora in Khari Baoli office



Hand shelled and sorted California almonds



D N Wadhwa (left), importer of Afghan nuts & dried fruit in Delhi



Wholesale shop in Guangzhou, China



Bulk Vietnamese cashews; vacuum packed roasted Calif almonds in Guangzhou, China



Roasted inshell Calif almonds wholesale pack



Vacuum packed roasted Calif almonds



Chinese green raisins, walnuts, pine nuts, Vietnamese cashews in Taipei, Taiwan wholesale market



Hand splitting Calif pistachios in China (Guangdong province)



Hand splitting Calif pistachios in Foshan, China (Guangdong province)



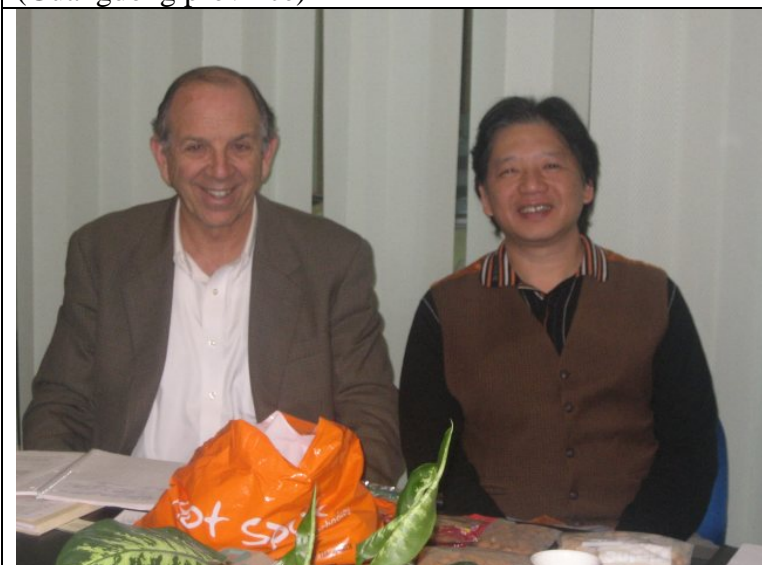
Hand splitting Calif pistachios in Foshan, China (Guangdong province)



Hand splitting Calif pistachios in Foshan, China
(Guangdong province)



Pistachio cleaning, drying, salting & roasting plant in
Foshan, China



Ned & George Chan of Leading Star Foods in Foshan,
China office



Ned Ryan, Tom Payne and 2 Indian importers
(Tony Singh on right) at USDA Mumbai Trade
Mission

ANNEX

Roots of Peace RAMP Grape Project, Afghan Almond Marketing Trade Mission to Asia

Scope of Work—Ned T. Ryan

Assignment: Make a trade mission to India (Delhi & Mumbai), China (Hong Kong & Guangzhou) and Taiwan for the purpose of expanding the markets for Afghan almonds.

Consultant: Ned T. Ryan
Affiliation: Agland Investment Services, Inc.

Level of Effort & Duration: Consulting days and expenses are within existing 9 month contract. Visit above markets from March 15 to 31, 2006.

Specific tasks & objectives: Visit specific, targeted nut importers and users to expand or introduce usage of Afghan almonds. Display photos of Afghan production, processing and packaging. Display samples of inshell and kernels available for export. Indicate prices and transportation options. Gather current usage and price information. Accumulate list of importers and users with contact and use information. Ascertain current market uses of similar products; calculate competitive advantages; determine best opportunities for Afghan almonds. Establish contacts with individuals who can supply local market information. File trip report with details of findings and opportunities. Trip report will include contact information from all meetings.

The primary objective of this trip will be to establish working relations between several international buyers and our nut marketing consultant. If prices and grades are such that the international buyers will be interested in purchasing almonds from Afghanistan, the actual deals will be made on the basis of the reputation of our nut marketing consultant. At this point, the presence of an Afghan exporter on the Trade Mission will not add significantly to winning a contract. In fact, since all of the Afghans exporters who are participating in the RAMP/ROP marketing program do not speak English, their presence at this point may detract from the possibility of winning new export contracts. At this point, our marketing consultant will be acting as a “salesman” for Afghan almonds.

Upon returning from this trip, our marketing consultant will “broker” (without a broker’s fee) deals between the international buyers and Afghan merchants participating in the RAMP/ROP nut marketing program. Our nut marketing consultant will guide the Afghans through the process of completing the international sale. This will likely not require a major effort on the part of the marketing consultant because our participating Afghan merchants are experienced at exporting to India and other regional markets. However, there may be some extra measures, required for export to these new export markets, requiring our marketing consultant’s assistance. Once an initial export transaction has occurred successfully, we expect that the international buyer and the Afghan exporter can continue to execute deals without assistance from our marketing consultant.

For the record, it should be noted that in planning this trade mission Mr. Ryan received guidance from Mr. Tom Payne who recently conducted a broad study of the SE Asian market for Afghan products funding by USAID/RAMP. Mr. Payne’s study is entitled: *Market Research for Afghan Products in SE Asia*. Mr. Ryan

will be relying on the contact information found in Mr. Payne's report to arrange meetings with prospective buyers. One particular finding from the study, namely, that there appears to be a promising market for almond in Taiwan, informed our decision to send Mr. Ryan to Taiwan.