



**ROOTS OF PEACE**

## **GRAPE Marketing and Development Final Report 2005**



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## INTRODUCTION

This is a report of Roots of Peace (ROP) fresh grape export promotion program activities during 2005. These activities were a continuation of similar, but smaller, efforts made in 2004. These activities were funded via USAID Contract No. 306-C-00-03-00502-00-ROP, Rebuilding Agricultural Markets in Afghanistan Program (RAMP), Job No. 29 Grape Revitalization for Afghanistan Productivity and Empowerment Project (GRAPE).

In essence, these activities represent an on-the-job training experience for the participating merchants. Through this experience, ROP assisted the participating merchants test the physical and financial feasibility of exporting fresh, chilled grapes to previously untried international markets. Previously, Afghan merchants had exported un-refrigerated grapes to India; but, this was the first time refrigerated grapes had been exported to India and the first time fresh, chilled grapes in commercial quantities had been exported to Dubai, Saudi Arabia, Kuwait and elsewhere.

The participating merchants were typical Afghan fresh fruit exporters. They had years of experience exporting un-refrigerated fresh grapes to relatively undemanding clients in Pakistan. However, they were inexperienced in preparing and exporting high-quality, fresh, refrigerated grapes.

ROP guided the participating merchants in purchasing, sorting and trimming the grapes prior to packaging. ROP demonstrated how the grapes must be packaged, pre-cooled and then placed in short-term cold storage, followed by transport either via land or air to the international market places. ROP led the merchants through the Customs procedures with the help of commercial clearing agents at both ends of the export channel. ROP also assisted the merchants locate and deal with the international buyers or commission agents handling the grapes in the international markets. ROP arranged for the domestic and international transport of the chilled grapes, setting in place procedures that the merchants will likely use in following years. However, it is important to state clearly that these grapes were not exported under the name of Roots of Peace. They were exported under the names of the participating Afghan merchants.

In addition to training, ROP facilitated this export marketing experience in other ways. The GRAPE project provided the equipment used to package, chill and store the refrigerated grapes prior to shipment. This equipment is contained in two packing houses or “market centers” that were built by the GRAPE project. One pack house is located near Kandahar. The second is located just north of Kabul in the Shamali Plain at Mirbachakot. These two market centers are being turned over at a subsidized rate to two associations of the participating merchants. The GRAPE project also provided some subsidy on packaging and operating expenses. For example, ROP provided approximately 50% of the value of the cartons in which the grapes were shipped. ROP advanced payment for transport. This money was returned to ROP when the grapes were sold.

The body of the report is divided into sections addressing the following subjects:

- ◆ A description of the conditions and activities associated with the two market centers: one at Kandahar and a second in the Shamali Plain. These sections

discuss the specific activities undertaken, the challenges faced and report the quantities of exports shipped.

- ◆ The next section discusses issues and considerations impacting the industry.
- ◆ Next is a section discussing ROP recommendations for improving the industry.

## KANDAHAR

### ***Fresh fruit exports from Kandahar***

Kandahar is one of the most well-known fruit-producing areas in Afghanistan. It produces very good quality fresh and dry fruits in large volumes for export to international markets.

Before the Russian invasion, Kandahari traders were exporting more than 70,000 MT of fresh/dry fruits annually from this area to different international markets. However, following the invasion, 25 years of war and internal disputes shut off all exports from Kandahar, resulting in damaged trade relations between Afghan exporters and international buyers and the loss of former and potential markets. Today Kandahar fresh fruits are exported almost exclusively to Pakistan. Pakistani buyers take advantage of the fact that they are the primary export market for Afghan produce and pay Kandahari traders low prices for grapes.

This area can once again be the source of much more foreign exchange for Afghanistan by producing more fresh/dry fruits, supplying quality produce, and strengthening trade relations between Kandahari traders and potential buyers in different potential international markets.

### ***Famous fresh/dry fruits of Kandahar***

Kandahari fresh produce with export potential includes grapes, pomegranates and muskmelons. Almonds, raisins and figs from Kandahar are in demand in international markets.

#### **Grapes**

Many varieties of grapes are grown in Kandahar but Shondulkhani (a seedless, green, longer-shaped grape variety) is a variety of grape good for exports and available in large volumes in Kandahar.



Kandahari Trader holding a bunch of Afghan grapes



Peer Muhammad (RoP Marketing)

## **Pomegranates**

Kandahar's pomegranates are very famous for their good taste, favorable appearance and bigger size. Kandahari pomegranates are in demand in Pakistan, India, Dubai, Saudi Arabia, and some other Middle Eastern countries.

## **Muskmelons**

There are many varieties of muskmelons grown in Kandahar. All varieties are very sweet in taste and the hard-skinned varieties, like Gemtor and Alkoni Musk Melons, are suitable for export. These varieties are preferred for export to international markets, as they are better suited for transportation and have a longer shelf life.

## **Almonds**

Afghan almonds from Kandahar are in very high demand in international markets. Most of the different varieties of almonds are of export quality. Afghan traders export almonds with shells and without shells depending on buyers' requirements.

## **Raisins**

There are many varieties of raisins: green raisins, red raisins, black raisins, etc.. The green (seedless) Shondulkhani Raisins have higher prices than other varieties because they face higher levels of demand in international markets.

## ***Security issues in Kandahar areas during 2005***

The 2005 grape harvest occurred just before the Afghan National Election for the Afghan Parliament and provincial Assemblies took place. The Taliban and other terrorist groups tried to stop the election by interfering more with security. The security in Kandahar was very bad during the harvest and the terrorists were targeting NGO's employees to kill them and prevent development activities in Kandahar. Many different NGO's employees were killed as a result. Moreover, it was very risky to travel by road between Kabul and Kandahar: bombs and rocket launchers targeted vehicles of NGOs or other US-related organizations on the road to stop their activities in Afghanistan.

In spite of these extremely dangerous conditions, it was very important for RoP to perform during the harvest for its GRAPE Project. It was very hard for RoP employees to work to facilitate exports of fresh fruits from Kandahar without risking their own lives during the grape harvest. It was also risky for the refer truck RoP hired to transport grapes from Kandahar to Kabul by road.

RoP Marketing was well aware of their responsibility to facilitate exports from Kandahar. The marketing team, exercising caution at all times, started their activities in Kandahar during the harvest and was able to implement a modified Pilot Marketing Program for year 2005 for the RoP GRAPE Project.

## ***RoP Marketing Activities in Kandahar areas during harvest 2005***

RoP Marketing played three major roles during harvest 2005 to facilitate exports from Kandahar. To begin, RoP Marketing worked with the Fresh Fruits Exporters Association of Kandahar (FFEAK). Next, the team worked with the operation and supervision of the Marketing Center. Finally, the team worked with international buyers willing to purchase produce from Afghan exporters.



Peer (RoP Marketing) discussing exports with Kandahari traders.



Mohammad (RoP Marketing) helping traders with paperwork for exports

Because of following problems and issues, achieving the goals set by RoP Marketing Program 2005 was not easy:

- ◆ **Risk-Averse Traders.** Traders didn't want to take a risk on exporting their grape produce to test new markets, as they could lose in these test-marketing experiments.
- ◆ **Disregard for Quality.** Traders are accustomed to exporting produce to Pakistan, where the quality of produce is less important than it is in potential new markets. If traders intend on making a profit from exports to potential new markets they need to provide quality produce. Traders don't pay farmers enough to serve as an incentive to supply the best grapes for exports; as a result farmers supply both good and bad quality grapes to traders.
- ◆ **Security.** Security was poor and the RoP Marketing Team was not able to go into the vineyards to supervise the harvest to ensure that the highest quality grapes were harvested for exports.
- ◆ **Uncertain Airline Shipment Capacity.** Ariana Airline could not provide exact dates and times for loading grape consignments on planes. They also couldn't announce the space available for air shipment for more than one day in advance.
- ◆ **Skeptical Buyers.** Potential buyers in different potential markets were not willing to buy grapes at fixed prices even, after looking at the samples. As the export procedure was not satisfactory to the buyers and the grapes were new in the market, the potential buyers wanted to import grapes to sell on a commission basis to test import procedures, quality, and the market.
- ◆ **Insufficient Trader Participation.** Traders were not playing their role in export-related logistics and sales process. They hoped to rely on RoP Marketing and were not willing to assume responsibility for the process, hoping that if this year's exports to new markets were profitable then they could use the information RoP gathered about logistics and exports for next year's exports to the markets.
- ◆ **Expensive Packing.** Traditionally, grapes are usually packed in crates. However, the packing imported from India was suitable for exports but was expensive. Afghan traders needed cheaper packing suitable for export to reduce expenses.

Because of the problems mentioned above, implementing the RoP Marketing Program was not easy but the Marketing Team put all of its energy and skills into action. The Team facilitated exports to different potential international markets, including India,

Saudi Arabia, Dubai and Kuwait, to test those markets' demand and potential for Afghan grapes.

### **Fresh Fruit Exporters Association of Kandahar (FFEAK)**

Working with individual traders on grape exports is generally easier than working with a group or association of Afghan traders. However, RoP's priority was to work with as many people as possible. Furthermore, entering and capturing market share in new markets bears a degree of risk and may not be initially profitable. Forming a consortium would diffuse the risk and potential losses, as the risk would be shared by all of the members of the group who participated in the marketing and export experiments. For these reasons FFEAK was designated as an association for RoP Marketing to work with on exports during grape season 2005.

### **RoP Market Center located in Kandahar**

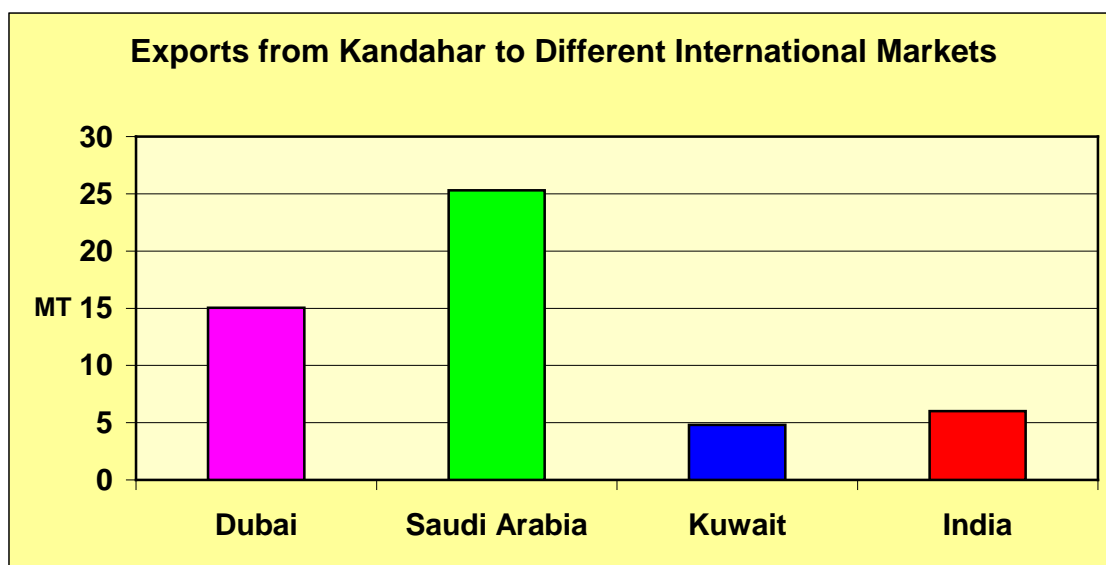
RoP wanted to establish a facility to clean, sort, store and chill grapes before international shipment to buyers to facilitate Kandahari grape exports in 2005 and beyond.

RoP built a market center in Habib City in Kandahar to be utilized by FFEAK for grape exports during and after the 2005 season. Construction delays and security problems prevented the use of the Market Center for season 2005. In the meantime a Temporary Market Center was created. The temporary center was created by renting a warehouse in a main area in Kandahar and then installing cold rooms and a pre-cooler and providing other related things like packing tables, floor washer, proper lightening, etc.

### ***Exports to International Markets***

During 2005, RoP Marketing supported the following exports from Kandahar to different international markets exhibiting potential for Afghan grapes and other fresh fruits:

<b>Exports from Kandahar to Different International Markets</b>			
<b>Date exported</b>	<b>Fruit name</b>	<b>Exported to</b>	<b>Quantity (MT)</b>
11-Aug-05	Grapes	Dubai	8
12-Aug-05	Grapes	Delhi	3
21-Aug-05	Grapes	Jeddah	10
29-Aug-05	Grapes	Kuwait	4.8
30-Aug-05	Grapes	Riyadh	5
1-Sep-05	Grapes	Jeddah	5.3
3-Sep-05	Grapes	Dubai	2.51
4-Sep-05	Grapes	Dubai	1.52
12-Sep-05	Grapes	Dubai	1
13-Sep-05	Grapes	Dubai	2
13-Sep-05	Grapes	Delhi	3
22-Sep-05	Grapes	Jeddah	5
<b>Total Exported Grapes from Kandahar Areas</b>			<b>51.13 MT</b>
<b>Dubai</b>	<b>Saudi Arabia</b>	<b>Kuwait</b>	
15.03MT	25.3MT	4.8MT	



### ***Lessons Learned From Kandahar Grape Season 2005***

To achieve the RoP Marketing Program's objective of finding new potential markets for grapes from Afghanistan, RoP provided the Market Center facility for cleaning, sorting, packing and storing grapes, along with other assistance in logistics, customs, shipping, and marketing. To some extent RoP Marketing achieved this objective, but getting positive results from most of the exports to various markets was difficult for a number of reasons. Following are some of the major reasons behind shortfall in export exportations to various potential international markets and recommendations to mitigate these shortfalls:

- ◆ **Risk-Averse Traders.** Traders should be informed and encouraged to participate in these test-marketing experiments, as exporting to potential international markets other than Pakistan is an investment in their future.
- ◆ **Disregard for Quality.** Traders need to be further educated about quality requirements for other potential markets.
- ◆ **Security.** Government and authorities responsible for security should provide a peaceful working environment for the extension services, processing and marketing experts to oversee the progress on extension services, processing and marketing components of the program and be able to provide guidance wherever required.
- ◆ **Uncertain Airline Shipment Capacity.** Air shipping authorities with Ariana Airline should be contacted to address the problems of the cargo section of their company.
- ◆ **Skeptical Buyers.** This problem needs productive work on the part of the extension department, processing, packaging, logistics, customs, and all other export-related procedures and formalities.
- ◆ **Insufficient Trader Participation.** Traders should make use of the programs available to learn how to execute profitable exports to various potential



- international markets. After the completion of the projects the traders must be self-sufficient and self-sustaining.
- ♦ **Expensive Packing.** Domestic packing was inadequate and packing imported from India was expensive. A factory in Afghanistan should be created that can produce the packaging demanded by the importer or customer in the potential international markets at a reasonable cost for Afghan exporters.

## SHAMALI

### *Fresh fruit exports from Shamali*

The fertile valley just north of Kabul is known as the Shamali Plain or simply, Shamali. Shamali is famous for fresh and dried fruits such as grapes, muskmelons, cherries, mulberries, almonds, and raisins. Most of Shamali has grape vineyards and grapes are the main produce export. Muskmelons, almonds and raisins are the other main sources of farmers' income.

Shamali was the war zone during internal disputes between some Afghan militant groups after the Russians retreated. During this time most of the grape-growing areas were destroyed, vines were uprooted, and farmers could not care for their vineyards. After the Taliban regime the farmers started working on their vineyards in Shamali areas again.

Shamali has very fertile land but doesn't have enough export-quality grapes. Shondulkhani grapes that are suitable for export are only available in a few areas in Shamali. Taifi is a good, export-quality grape available in Shamali but no farmer has an adequate number of vines to produce enough grapes to fill one 40 ft. container from a single vineyard. As a result, the traders must collect Taifi grapes from different farmers to get enough grapes to make a consignment. This is problematic because it increases the expense of transferring grapes from vineyards to the Market Center and increases the transfer time, which results in grapes that are less fresh.

This area is very fertile and suitable for growing most fresh fruits. Shamali's farmers and traders can increase Afghan earnings from exports by growing the fruits most demanded in potential international markets for export, and can thereby reduce the unemployment rate by promoting export and export-related business opportunities.

Following are the famous fresh/dried fruits of Shamali areas.

#### **Fresh fruits**

Includes grapes, apples, cherries, apricots, pears and mulberries etc.

#### **Dried fruits**

Includes almonds, raisins, walnuts and dried mulberries etc.

#### **Grapes**

Shamali areas are very famous for grapes. Many varieties of grapes are available here, such as Shondulkhani, Taifi, Hussaini, Kishmishi (green, round, seedless grapes) and Kata etc.. Shondulkhani and Taifi are suitable for international export.

## Other fruits

Apples, cherries, apricots, and pears are also very tasty and profitable. These fruits are currently being sold in local markets and are exported to Pakistan. Low prices in local markets and in Pakistan result in poor profits for farmers.

## Raisins

There are several varieties of raisins available in large volumes in Shamali areas, such as red raisins, green raisins and black raisins.

## *RoP Marketing in Shamali during 2005*

In Shamali most grape-growing farmers have small vineyards and are not organized into a farmers/traders association. Since each grape-growing farmer produces only a small volume of grapes, exporting a greater volume of grapes from Shamali entails working with a large number of farmers. This greatly increases the amount of work to be done before harvest. Furthermore, without a central association to work with, increasing awareness about international markets' requirements and educating farmers was slow-going. Because of following problems and issues, achieving RoP Marketing Program 2005's goals was not easy:

- ◆ **Lack of Farmers' and Traders' Associations and Cooperation.** There was no Farmers' and Traders' Association in Shamali. Every farmer and trader was working individually, which made extension and export work difficult.
- ◆ **Unavailability of Export-Quality Grapes.** Most of the grapes were not export quality. There were only two village areas in Shamali near Kabul that had export quality grapes.
- ◆ **Improper Use of Inputs.** Agro-inputs were used improperly or were never used to yield quality produce and larger berry size.
- ◆ **Improper Packing.** Available packing in Afghanistan was not suitable for exporting to potential international markets and the packing imported from India was more expensive and eroded potential profit margins.
- ◆ **Inadequate Shipping.** There was no shipping company to provide refer shipping services and the shipping companies providing shipping services in Afghanistan were charging a lot more than the services actually cost.

Following are the details of RoP Marketing Team's work in Shamali:

### Market Center in Mirbachakot in Shamali

This Market Center is a good model of grape processing, packing, chilling and cold storage for Northern Afghanistan and all Afghans. In the Market Center, exporters/farmers can learn about preparation and requirements for export of their fresh produce to international markets. Here exporters/farmers learn practical skills, like proper packing, sorting, and cleaning for export, as well as proper application of refer technology to keep grapes fresh during transfer to the customer.

During season 2005, RoP Marketing hired 60 women in the Marketing Center to clean, sort, and pack grapes. The women were trained to process and pack grapes—skills that will enable them to work in the Market Center in the future and help address issues of financial needs and independence.

## Export-quality grapes

Having export-quality produce available is essential to exporting Afghan fresh/dried fruits—otherwise efforts to find opportunities in international markets would be futile. In grape season 2005, only 20% of Shondulkhani and Taifi export-quality grapes were grown in Shamali areas near Kabul in the villages of Guldara and Shakardara. In Feroz-e-Nakhchi (in Samangan) 60% of Taifi grapes were export quality. Although arrangements had been made for grape exports from both Shamali and Samangan, exports were made only from Shamali because grapes from Samangan had been damaged from freezing before they could be harvested.

### *Exports During Year 2005*

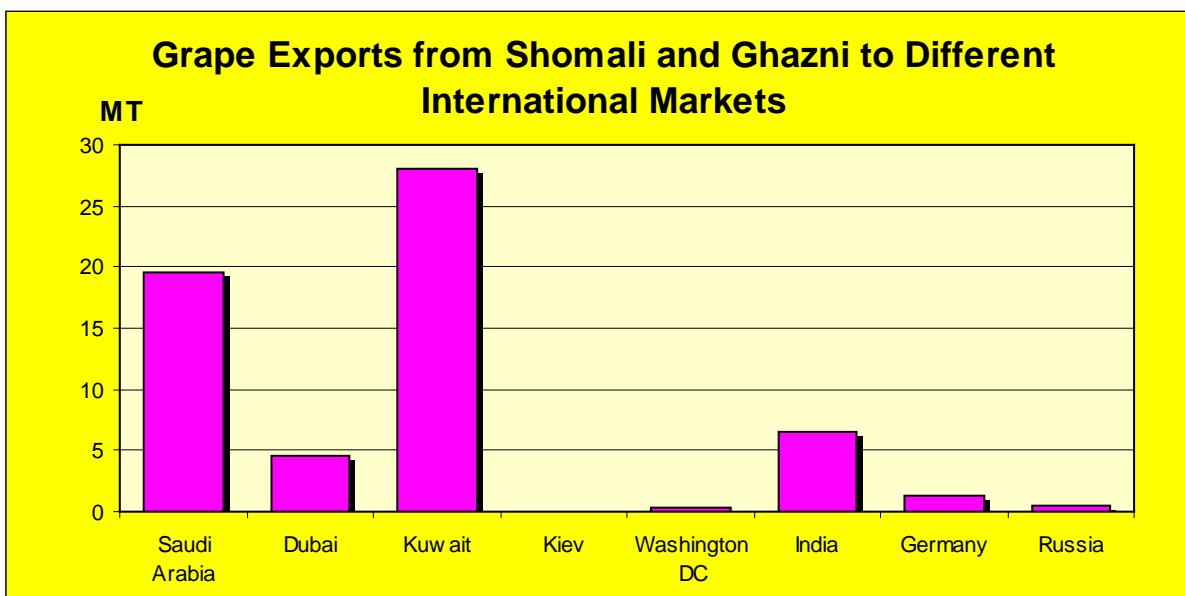
Shamali is located near the Kabul Airport, which makes exports by air much more feasible from Shamali areas than from Kandahar. Given Shamali's proximity to Kabul Airport, RoP Marketing was expecting a large volume of exports from Shamali areas. However, as most of the grapes from Shamali did not meet the level of quality demanded by international buyers, actual exports did not meet the volume anticipated. RoP Marketing facilitated exports of 60.71 MT from Shamali to different international markets (for more information please see the spreadsheet on the following page).

## Exports Year 2005

Exports from Shamali and Ghazni to International Markets					
Date exported	Fruit name	Exported to	Quantity (MT)	Boxes	Shipment status
27-Sep-05	Grapes	Jeddah	5.1	919	Air shipping Ariana
29-Sep-05	Grapes	Jeddah	5.6	1000	Air shipping Ariana
2-Oct-05	Grapes	Dubai	2	400	Air shipping Ariana
4-Oct-05	Grapes	Dubai	2	400	Air shipping Ariana
10-Oct-05	Grapes	Kuwait	2.05	210	Air shipping Ariana
13-Oct-05	Grapes	Jeddah	5.10	910	Air shipping Ariana
14-Oct-05	Grapes	Kuwait	6.50	650	PIA Via Peshawar, Pakistan
16-Oct-05	Grapes	Jeddah	3.77	674	Air shipping Ariana
17-Oct-05	Grapes	Kuwait	6.50	650	PIA Via Peshawar, Pakistan
19-Oct-05	Grapes	Kuwait	6.50	650	PIA Via Peshawar, Pakistan
21-Oct-05	Grapes	Kuwait	6.50	650	PIA Via Peshawar, Pakistan
26-Oct-05	Grapes	Kiev (Ukraine)	0.06	10	Air shipping Ariana
27-Oct-05	Grapes	Dubai	0.50	99	Air shipping Ariana
1-Nov-05	Fresh/Dried fruits and Vegetables	Washington DC	0.26	44	TNT
6-Nov-05	Grapes	Delhi	6.5	1274	Land shipping Pyramid Co
13-Nov-05	Grapes	Frankfurt (Germany)	1.27	253	Air shipping Ariana
15-Nov-05	Grapes	Moscow (Russia)	0.51	100	Air shipping Ariana
<b>Total Exported Grapes from Kandahar Areas</b>			<b>60.71</b>	<b>8893</b>	

Total Exports from Shamali to International Markets							
Saudi Arabia	Dubai	Kuwait	Kiev	Washington DC	India	Germany	Russia
19.57	4.50	28.05	0.06	0.26	6.5	1.27	0.51

Note: In the spreadsheet above, 26 MT of grapes were exported from Ghazni and the rest of all other grapes consignments are exported from Shamali.



### *Lessons Learned From Shamali Grape Season 2005*

RoP Marketing had high expectations for grape test-marketing exports from Shamali grape-growing areas to international markets. The area does not have the security issues that Kandahar does and is close to Kabul Airport, which allows relatively easy access for air shipment. However, the season fell short of expectations for several reasons:

- ◆ **Lack of Farmers' Associations and Cooperation.** There should be a traders and farmers' association responsible for investigating market information and member education and coordination. The association should educate their members about the need to export to potential markets and international markets' requirements and quality demands. The association should also implement the changes required to promote profitable exports from Afghanistan.
- ◆ **Unavailability of Export-Quality Grapes.** Export-quality grapes (Shondulkhani and Taifi) are not grown in high volume in Shamali near Kabul. Shondulkhani and Taifi grapes are almost 20% of the grapes grown in Shamali, while the other 80% of grapes are varieties unsuitable for export. Farmers are need to grow the varieties of grapes demanded in potential international markets to promote exports.
- ◆ **Improper Use of Inputs.** Proper use of agrochemicals and fertilizers could produce grapes that are bigger in size and more attractive in appearance. The extension department needs to educate farmers about the use of agrochemicals, fertilizers, pesticides and insecticides so that farmers can grow higher quality grapes in their vineyards.
- ◆ **Improper Packing.** Grapes must be packed in packing suitable for export. Grapes should be packed in packaging according to customer demand or market requirements. A factory should be made in Kabul that could make quality packaging suitable for Afghan fresh grapes and other fruits, as imported packing is expensive.
- ◆ **Inadequate Shipping.** There is no Afghan shipping company providing refer containerized shipping in Afghanistan for shipment to other countries. Some

Pakistani shipping companies are providing refer shipping services in Afghanistan for international shipments but are very expensive. The Afghan Government should encourage the private sector to provide the required refer shipping services.

## **ISSUES AND CONSIDERATIONS**

This section discusses some of the specific issues facing the fruit industry and future opportunities.

### ***Agricultural Inputs***

Early in 2005 RoP extension decided to assist farmers in the area by finding low-cost inputs and a finance package so that the farmer could pay for the inputs at the end of the season. Two things did not happen: financing did not come through and the agricultural inputs did not arrive in Afghanistan at the proper time.

### ***Agriculture Credit for Small Farmers***

Ag credit is very much-needed, hard to find, and has impossibly high interest rates. I was optimistic last February that I would find credit for 200 farmers because I had a list of 8 different microcredit lending institutions that appeared to meet our needs. In the end only BRAC applied to our RoP grape farmers and would consider going into some of our areas.

BRAC required that RoP would supply them with a list of prescreened interested farmers, their names, fathers' names and village. BRAC would go to the village and interview each loan applicant, which was close to 200 farmers in many different villages. They would make the survey, collect the needed information, and make the loan. This 10-month, \$200 to \$400 loan required monthly payments and a compound interest rate of 22 to 26% depending on monthly payments and when the farmers paid it back.

There is a great need for farmer credit and lending institutions that can handle microcredit. This situation needs attention by aid groups and hopefully things will change in time for the 2006 crop year.

### ***Afghan Box and Carton Factory***

One of the biggest concerns of Afghan traders involved in international fresh fruit sales is the shipping carton. A new Afghan box factory that is able make an international-quality carton at an affordable price is a must if Afghanistan is to compete in the world market. Cost, availability and quality are all major considerations (see Grape Manual for packing and packaging). The factory must be flexible to make cartons or boxes for all fresh and dry fruit, nuts and other Afghan products to be sold in the foreign market.

There are a few small functioning box factories in Kabul but they only can make raisin boxes with single color printing. Most of the box factories have equipment from the early 1970's and cannot be upgraded to make international-quality boxes and cartons.

If the follow-on project (ASAP) or other institutions would promote a box factory by granting and/or offering a low interest loan of \$50,000 for a new building and or equipment I'm sure this could be reality by the 2006 fruit season.

### ***Market Centers and Associations***

RoP Marketing has four Market Centers (MC) in Afghanistan. Three are in Shamali and the other is in Kandahar. According to the program these Market Centers will be given to grapes Farmers' Associations in the areas where the Market Centers are located. The Mirbachakot MC is ready for Association setup and Kandahar. The two remaining centers in Laghmani and Bagram are just buildings with no cold facilities; without these facilities it is much more difficult to show the potential benefits to Farmers'/ Growers' Associations.

Mirbachakot is fully equipped with a training facility, loading dock, cool rooms, pre-cooler, manager office and generator. RoP Marketing worked closely with Bedak Farmers Association in developing the Association into a legal entity. Mr. Sayed Idris, Vice President of Bedak Farmers'/Traders' Association, is registered.

Security and construction delays in Kandahar prevented the use of the Habib city market center for the 2005 grape harvest season. The Kandahar MC could be fully loaded with cool rooms and generator but FFEAK has not yet produced the \$20,000 needed to buy one cool room and get one free.

The Laghmani market center is nothing more than an open shed with a guardhouse and no well. The only possibility I have going is to work with Bagram Food Packing Company to form an Association around their farmers and traders that bring in raisins and or grapes to the Charekar plant. They are interested but not until the new grape juice factory is started in a few months.

Bagram Market Center is very complicated with all of the extension activities going on. The Extension Department has a complete grape nursery at the same site so it is imperative to create an association that is pro-RoP Extension and their activities. The leading possible is The Kabul Fertilizer and Ag Inputs Association.

In terms of Association development, I'm finding it very important to have a couple of strong leaders with some money to avoid problems similar to those occurring in Kandahar. We are doing what we can to form these Associations.

### **RECOMMENDATIONS**

RoP's main work task with farmers and traders is to open international markets for Afghan fresh (especially grapes) and dried fruits. The following are some recommendations to make progress towards this objective:

#### ***Security***

There are two kinds of security issues that must be taken into account by the government and NGOs to accomplish marketing tasks. Both are very important and play a considerable role in implementing marketing programs together with Afghan farmers and traders.

- ◆ NGOs should consider the security situation and should facilitate their employee's travel to places and plan accordingly where security is a problem.

- ◆ NGOs should inform government authorities in detail about their programs and ask for Government assistance in ensuring security where the program will be implemented.

### ***Extension Services***

Having export-quality produce is critical to finding a good market for grapes. The extension department is responsible for achieving the goal of growing quality grapes in vineyards by training the farmer and educating the farmer about current technology. The extension department should work with the farmers supplying grapes to the exporters exporting under RoP programs. Grapes grown in vineyards are dirty because vines are not on trellises and are lying on the ground. In Shamali and Kandahar, extension workers should encourage Afghan farmers to upgrade their vineyards with the varieties of grapes most demanded in international markets and they should put the vines on the trellises.

### ***Good Export-Quality Grapes***

The markets targeted for Afghan produce exports are accustomed to high quality products. Good quality grapes is very important for entering and capturing market share in international markets. Good export quality means a good-looking cluster with healthy, clean, longer and fat berries like the Shondulkhani and Taifi varieties feature. Traders and farmers need to be further educated about quality requirements of their potential markets.

### ***Workers for Processing Grapes***

Trained workers are required to process grapes in the Market Center so that they can clean, sort and the pack grapes properly; untrained workers do not know about the quality levels demanded in international markets. An experienced supervisor is required. Permanent, trained workers can be trusted more for her/his quality of work as compared to daily hired workers.

### ***International Trips for Marketing and Supervising Sales***

International trips are very important for marketing purposes and for troubleshooting problems found in the export process. While exporting to new markets it's important to travel to the receiving market to see that everything is going well with sales and handling. The person(s) traveling should be an NGOs' employee and the exporter. It is important for the RoP employee to travel so that he can report on the receiving market and better know and understand the buyers and their demands.

### ***Uncertain Airline Shipment Capacity***

Air shipping authorities of Ariana Airlines should be contacted and should address their problem so that they will be able to confirm space for cargo in advance to facilitate exports of fresh fruits.

### ***Inadequate Shipping***

Private sector should be encouraged to develop shipping companies to provide refer and non-refer containerized shipping services in the country for international shipments to enable the transportation of exports.

### ***Long-Term Projects and Jobs***

Certain complex problems require long-term projects and involvement of community organizations willing to promote Afghanistan, such as NGO's, the private sector and Afghan Government organizations. These projects include upgrading vineyards with varieties of quality grapes demanded in international markets, educating and updating farmers' technology, capturing international market share, and solving logistical problems. Short-term projects can't achieve all of these important goals. As such, long-term projects of 10+ years should be designed for that purpose.

Employees working on the marketing side of export promotion should have long-term positions to ensure continuity and build on former experience and relations. As they work they gain invaluable experience with traditional systems of production, processing, handling, logistics, and exports. In the process they are exposed to problems that need to be addressed to better promote exports and achieve exportation goals.



## ANNEXES

### *Annex A: Weekly Grape Prices in Afghanistan*

Weekly Grape Prices in Afghanistan										
Shondulkhani and Taifi Grapes, extra grade, per kilogram pricing, selling price quoted										
Quotation date	Location	Wholesale (Afs)		Wholesale (USD)		Retail Price (Afs)		Retail Price (USD)		Remarks
		Low	High	Low	High	Low	High	Low	High	
06-Aug-05	Kandahar	21	22	0.43	0.45	25	27	0.5	0.55	Shondulkhani Grapes
13-Aug-05	Kandahar	24	25	0.48	0.5	27	30	0.55	0.6	Shondulkhani Grapes
20-Aug-05	Kandahar	25	26	0.5	0.52	28	31	0.57	0.62	Shondulkhani Grapes
27-Aug-05	Kandahar	26	27	0.53	0.55	30	32	0.60	0.65	Shondulkhani Grapes
03-Sep-05	Kandahar	29	30	0.58	0.6	32	35	0.65	0.70	Shondulkhani Grapes
10-Sep-05	Kandahar	29	30	0.58	0.6	32	35	0.65	0.70	Shondulkhani Grapes
17-Sep-05	Kandahar	34	35	0.68	0.7	37	40	0.75	0.80	Shondulkhani Grapes
24-Sep-05	Kandahar	34	35	0.68	0.7	37	40	0.75	0.80	Shondulkhani Grapes
01-Oct-05	Shamali	24	25	0.48	0.5	27	30	0.55	0.60	Shondulkhani Grapes
08-Oct-05	Shamali	24	25	0.48	0.5	27	30	0.55	0.60	Shondulkhani Grapes
15-Oct-05	Shamali	26	27	0.53	0.55	30	32	0.6	0.65	Shondulkhani Grapes
	Shamali	30	31	0.60	0.62	33	36	0.67	0.72	Taifi Grapes
22-Oct-05	Shamali	29	30	0.58	0.6	32	35	0.65	0.70	Shondulkhani Grapes
	Shamali	31	32	0.63	0.65	35	37	0.70	0.75	Taifi Grapes
29-Oct-05	Shamali	29	30	0.58	0.6	32	35	0.65	0.70	Shondulkhani Grapes
	Shamali	34	36	0.68	0.72	37	39	0.74	0.78	Taifi Grapes
05-Nov-05	Shamali	30	31	0.60	0.62	33	36	0.67	0.72	Shondulkhani Grapes
	Shamali	35	37	0.70	0.75	38	40	0.77	0.80	Taifi Grapes
12-Nov-05	Shamali	34	35	0.68	0.7	37	40	0.75	0.80	Shondulkhani Grapes
19-Nov-05	Shamali	35	36	0.70	0.72	38	41	0.77	0.82	Shondulkhani Grapes

*Annex B: Profit and Loss Summary*

<b>Grape Exports to Saudi Arabia</b>			
<b>Total Net Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
1000 boxes	Shondulkhani variety fresh grapes	4.5	4,500.00
<b>Total Gross Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
1000 boxes	Shondulkhani variety fresh grapes	5.1	5,100.00
<b>Total Gross Weight Accounted</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
1000 boxes	Shondulkhani variety fresh grapes	5.1	5,100.00
<b>Expenses in Kabul</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
4500 Kgs	Grapes procurement	\$0.50	\$2,250.00
1000 boxes	Paper work plus custom duty		\$180.00
1000 boxes	Boxes	\$0.60	\$600.00
1000 boxes	Cooling expenses in Kandahar	\$0.14	\$140.00
1000 boxes	Transportation from Kandahar to Kabul	\$0.32	\$320.00
1000 boxes	Customs clearing	\$0.22	\$180.00
5100 Kgs	Freight charges for shipping the grapes to Saudi Arabia via Ariana Airlines	\$0.25	\$1,275.00
<b>Total</b>			<b>\$4,945.00</b>
<b>Expenses in Saudi Arabia</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
1000 boxes	Custom duty paid	\$0.23	\$225.00
1000 boxes	Cold storage cost in Saudi Arabia	\$0.15	\$150.00
1000 boxes	Commission on sales	\$0.64	\$640.00
<b>Total</b>			<b>\$1,015.00</b>
<b>Income</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
800 boxes	Sales in Saudi Arabia	\$8.00	\$6,400.00
<b>Total</b>			<b>6,400.00</b>
	Total sales		6,400.00
	Total expenses		5,960.00
<b>Total Income</b>			<b>\$440.00</b>

<b>Grape Exports to Fresh Fruit Company, Dubai (UAE)</b>			
<b>Total Net Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
1111 boxes	Shondulkhani variety fresh grapes	4.5	4,999.50
<b>Total Gross Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
1111 boxes	Shondulkhani variety fresh grapes	5	5,555.00
<b>Total Gross Weight Accounted</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
1022 boxes	Shondulkhani variety fresh grapes	5	5,110.00
<b>Expenses</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
4999.5 kgs	Grapes procurement	\$0.50	\$2,499.75
1022 boxes	Boxes	\$0.60	\$613.20
1022 boxes	Cooling expenses in Kandahar	\$0.14	\$143.08
1022 boxes	Transportation from Kandahar to Kabul	\$0.32	\$327.04
1022 boxes	Customs clearing	\$0.09	\$91.98
5110 Kgs	Freight charges for shipping the grapes to Dubai via Ariana Airlines	\$0.35	\$1,788.50
<b>Total</b>			<b>\$5,463.55</b>
<b>Income</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
1022 boxes	Sales in Dubai	\$6.00	\$6,132.00
1022 boxes	Less expenses incurred by importer for cleaning and sorting		(\$300.00)
<b>Total</b>			<b>5,832.00</b>
	Total sales		5,832.00
	Total expenses		5,463.55
<b>Total Income</b>			<b>\$368.45</b>

<b>Grape Exports to Jaleel Trading L.L.C., Dubai (UAE)</b>			
<b>Total Net Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
666 boxes	Shondulkhani variety fresh grapes	4.5	2,997.00
<b>Total Gross Weight exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
666 boxes	Shondulkhani variety fresh grapes	5	3,330.00
<b>Total Gross Weight Accounted</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
261 boxes	Shondulkhani variety fresh grapes	5	1,305.00
<b>Expenses</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
2997 Kgs	Grapes procurement	\$0.50	\$1,498.50
261 boxes	Boxes	\$0.60	\$156.60
261 boxes	Cooling expenses in Kandahar	\$0.14	\$36.54
261 boxes	Transportation from Kandahar to Kabul	\$0.32	\$83.52
261 boxes	Customs clearing	\$0.09	\$23.49
1305 Kgs	Freight charges for shipping the grapes to Dubai via Ariana Airlines	\$0.35	\$456.75
	Commission on sales		\$61.47
	Expenses in Dubai		\$94.26
<b>Total</b>			<b>\$2,411.13</b>
<b>Income</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
155 boxes	Sales in Dubai	\$6.50	\$1,007.50
106 boxes	Sales in Dubai	\$2.01	\$213.06
<b>Total</b>			<b>1,220.56</b>
	Total sales		1,220.56
	Total expenses		\$2,411.13
<b>Total Income</b>			<b>-1190.57</b>

<b>Grape Exports to KLG Imports and Exports, Delhi</b>			
<b>Total Net Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
600 boxes	Shondulkhani variety fresh grapes	4.5	2,700.00
<b>Total Gross Weight Exported</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
600 boxes	Shondulkhani variety fresh grapes	5	3,000.00
<b>Total Gross Weight Accounted</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Kgs</b>	<b>Total Kgs</b>
436 boxes	Shondulkhani variety fresh grapes	5	2,180.00
<b>Expenses in Kabul</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
2700 Kgs	Grapes precurement	\$0.50	\$1,350.00
436 boxes	Boxes	\$0.60	\$261.60
436 boxes	Cooling expenses in Kandahar	\$0.14	\$61.04
436 boxes	Transportation from Kandahar to Kabul	\$0.32	\$139.52
436 boxes	Customs clearing	\$0.09	\$39.24
2,180 Kgs	Freight charges for shipping the grapes to Dubai via Ariana Airlines	\$0.25	\$545.00
<b>Total</b>			<b>\$2,396.40</b>
<b>Expenses in India</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
436 boxes	Duties in India		\$248.00
436 boxes	Handling in Delhi airport		\$623.00
436 boxes	Plant & Quarantine		\$93.00
436 boxes	Speed money		\$116.00
436 boxes	Transportation from airport to market		\$37.00
436 boxes	Repacking and Misc		\$51.00
436 boxes	Replacement of 300 boxes		\$105.00
436 boxes	Clearing agent charges and speed money		\$465.00
436 boxes	Cold storage charges		\$88.00
<b>Total</b>			<b>\$1,826.00</b>
<b>Income</b>			
<b>Quantity</b>	<b>Description</b>	<b>Unit Rate</b>	<b>Total</b>
100	Sales in Delhi	\$8.60	\$860.00
200	Sales in Delhi	\$5.39	\$1,078.00
136	Sales in Delhi	\$3.67	\$499.12
<b>Total</b>			<b>2,437.12</b>
	Total sales		2,437.12
	Total expenses in Kabul and Delhi		4,222.40
<b>Total Income</b>			<b>-435.28</b>

<b>Grape Exports to KBS Fruits Pvt. Ltd, Delhi (Refrigerated Land shipping)</b>			
<b>Total Net Weight Exported</b>			
Quantity	Description	Unit Kgs	Total Kgs
1270 boxes	Shondulkhani variety fresh grapes	4.5	5,715.00
<b>Total Gross Weight Exported</b>			
Quantity	Description	Unit Kgs	Total Kgs
1270 boxes	Shondulkhani variety fresh grapes	5.1	6,477.00
<b>Total Gross Weight Accounted</b>			
Quantity	Description	Unit Kgs	Total Kgs
1270 boxes	Shondulkhani variety fresh grapes	5.1	6,477.00
<b>Expenses in Kabul</b>			
Quantity	Description	Unit Rate	Total
5715 Kgs	Grapes procurement	\$0.50	\$2,857.50
1270 boxes	Boxes	\$0.60	\$762.00
1270 boxes	Custom Formalities and paper work in Kabul		\$71.00
1270 boxes	Refer Transportation from Kabul to Wagah		\$2,600.00
1270 boxes	Custom Clearing at Torkham on Afg side		\$53.00
1270 boxes	Custom Clearing at Torkham on Pak side		\$79.00
1270 boxes	Custom Clearing at Dry Port in Peshawar		\$68.00
1270 boxes	Custom Clearing and Handling at Wagah border on Pak side		\$176.00
1270 boxes	Custom Clearing and Handling at Wagah border on India side		\$739.00
1270 boxes	Non-refer transportation from Wagah border to Delhi		\$219.00
<b>Total</b>			<b>\$7,624.50</b>
<b>Expenses in India</b>			
Quantity	Description	Unit Rate	Total
1270 boxes	Total Customs Duty Paid		\$276.80
1270 boxes	Transportation cost from Wagah Border to Delhi.		\$213.68
1270 boxes	Handling costs at Wagah border		\$451.11
1270 boxes	Cold storage costs		\$193.50
1270 boxes	Sorting & Handling cost in Delhi market		\$31.84
1270 boxes	Repacking and Misc.		\$35.25
1270 boxes	Telephone/dd charges		\$22.23
1270 boxes	Area Agent cost		\$126.98
1231 boxes	Commission on sales		\$380.93
<b>Total</b>			<b>\$1,732.32</b>
<b>Income</b>			
Quantity	Description	Unit Rate	Total
1231 boxes	Sales in Delhi		\$6,349.00
<b>Total</b>			<b>6,349.00</b>
	Total sales		6,349.00
	Total expenses from Kabul to Wagah border (on Pak side)		7,624.50
	Total expenses on Wagah border (on India side ) and in Delhi		1,732.32
<b>Total Income</b>			<b>US\$(3,007)</b>

## ***Annex C: Observations on Specific Markets***

### ***Dubai***

Fresh Fruits Company has been the most professional and up-front about the Afghan grape shipments.

- ◆ A person representing the buyer that understands international standards and quality should oversee the packing or training for packing the Afghan grapes.
- ◆ Each Afghan owner or trader working with RoP should go to Dubai to see their product being sold and to better understand the market.
- ◆ Shelf life needs to be improved. Some of the grapes were overripe and roughly handled, which makes it very difficult to get them to the international market in good condition.
- ◆ The need for more consistent bunches and larger berry size.
- ◆ Better overall quality and consistency
- ◆ Pre-cooling is a must; without pre-cooling shipment should not occur.
- ◆ Breaks in the Cold Chain (cool room to airport to cool room)
- ◆ Only ship varieties that are in demand in the international market; pilot test other varieties of “good quality” grapes

Even after all of the challenges Fresh Fruit was optimistic for next year by giving ideas for labeling and branding AF Grapes in the UAE market. These ideas included:

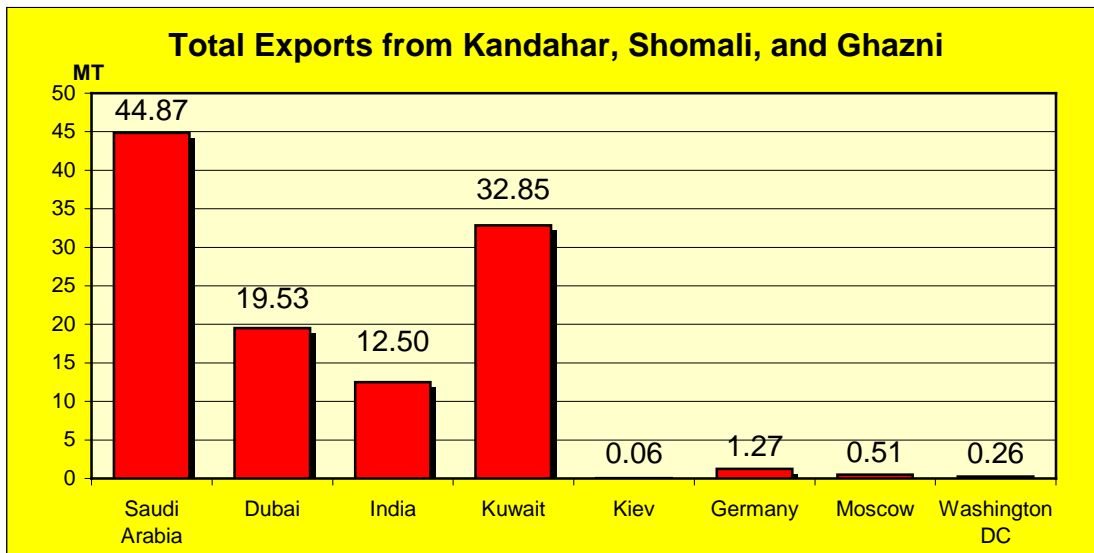
### ***Ukraine- Supermarkets/ other***

I see a good possibility in Ukraine for raisins (red and green) and almonds (see the December trip report). The Former Soviet Union pays European prices for good quality without all of the restrictions related to food security. This market does not reject lower quality produce—it just gets sold at a lower price. This is an ideal market for Afghanistan as it goes through the growing pains of establishing quality and a consistent supply.

### **Summary: High Potential Markets**

- 1- Saudi Arabia. They like the Afghan products, have money, and want to help their Moslem brother!
- 2- The former Soviet Union. They pay European prices for good quality without all of the restrictions and regulations
- 3- Bangladesh. For Kandahar and Samangan grapes

These markets need to be explored and exploited. The way to start is with trade missions, and then a lot of follow-up.



In the chart above we can clearly see that Saudi Arabia tops the list of importers of Afghan grapes, followed by Kuwait and Dubai. These three countries exhibit considerable market potential for Afghan grapes. In 2005 shipments to these countries were only test shipments. Next season holds great promise in the international markets if we build upon our efforts and development of export-quality grapes and learn from our experiences. Also, efforts should be made to understand and resolve the problems in the markets where marketing efforts had less of a payoff. With time and efforts these underlying issues may be resolved to increase profit and volume of Afghan grapes exported to those countries that are currently less responsive



**Annex D: International and Afghan Merchants Participating in the ROP Program 2005 Grape Season**

From	Program participated		Name of Participant	Designation	Institute/company	
Afghanistan	Pilot Exports		Mr. Mohammad Nader	Fruits Exporters	Nader Naseri Ltd	
			Mr. Zabihullah	Fruits Exporters	Zikhullah Momenzada Ltd	
			FFEAK Traders	Fruits Exporters	Fresh Fruits Exporters Association of Kandahar	
			Hajji Sabet	Fruits Exporters	Hajji Sabet Trading Company	
			Mr. Shukoor	Fruits Exporters	Ash. Co. Ltd	
			Mr. Sayed Idris	Fruits Exporters	Kabul Trading Company	
			Mr. Shahzada Khan	Fruits Exporters	Badri Super Market	
	Trade missions	To India	FFEAK Traders	Fruits Exporters	Fresh Fruits Exporters Association of Kandahar	
			Mr. Shukoor	Fruits Exporters	Ash. Co. Ltd	
			Mr. Muhammad Zia	Fruits Exporters	Zia Aziz Trading Co. Ltd	
		To Moscow/Ukraine	Mr. Mohammad Nader	Fruits Exporters	Nader Naseri Ltd	
			Mohammad Kabir Hakimi	Fruits Exporters	Khalid Khyber Ltd	
			Mr. Azim Wardak	President, International Trade, MoC	Ministry of Commerce	
			Mr. Saddat Hashimi	Former President, Board of Dried Fruits and Raisin Export	Ministry of Commerce	
			Mr. Sayed Jamal Muntazer	Incharge Russia and Ukraine Section Ministry of Foreign Affairs	Ministry of Freign Affairs	
		To Kuwait/Dubai	Mr. Farahi	Former Deputy Minister, MoC	Ministry of Commerce	
			Mr. Azim Wardak	President, International Trade, MoC	Ministry of Commerce	
			Mr. Abdul Salam Munir	Former President, Export Promotion, MoC	Ministry of Commerce	
		Out of Afghanistan	From India	Mr. Kishan Lal Gaba	Fruits importer	KLG Imports/Exports
				Mr. Sujinder Singh	Fruits importer	K.B.S. Fruits Pvt. Ltd
			From Dubai	Mr. Khalil-ur-Rehman	Fruits importer	Mr. Khalil-ur-Rehman
Mr. James Varghese	Fruits importer			Jaleel General Trading L.L.C		
Mr. Shahzada Khan	Fruits importer			Badri Super Market		
From Moscow	Mr. Zahir		Fruits importer	000 (Agros) 105120 Moscow city Melneskee Per. D1/3 Str 1		
From Ukraine	Mr. Mohammad Rahim		Fruits importer	UKRPODIMPEX-91 Imports/Exports		