



Uzbek Dry Fruit Exports: Prospects, Problems and Potential



© 2021, United Nations Conference on Trade and Development

The findings, interpretations and conclusions expressed herein are those of the authors and do not necessarily reflect the views of the United Nations or its officials or Member States.

The designation employed and the presentation of material on any map in this work do not imply the expression of any opinion whatsoever on the part of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

This publication has been edited externally.

UNCTAD/DITC/COM/INF/2021/5

ABSTRACT

This study analyses the current status and future prospects of Uzbek dried fruit exports, with a focus on three issues. First, it reviews the global trade in dried fruit and the position of Uzbekistan within that trade. Second, it uses data from a purpose-built field survey conducted in five regions of Uzbekistan to show the connection between the value chain of dried fruit in Uzbekistan and the quality of the country's dried fruit. Third, it discusses the various trade standards that influence the export of dried fruit from Uzbekistan, with a focus on the European Union. On the basis of analysis of the connection between trade and the quality of the value chain, and on discussion of trade standards for dried fruit, a series of policy measures are proposed to foster the value of Uzbek dried fruit exports.

ACKNOWLEDGEMENTS

This document was prepared by Rodrigo Cárcamo-Díaz, UNCTAD Commodities Branch, Division on International Trade and Commodities, Julian Roche, UNCTAD Consultant, and Jasurbek Rustamov, UNCTAD Consultant.

The authors would like to thank Justin Van de Ven, Sandra Cárcamo-Obrecht, Janvier Nkurunziza, and Furkat Alimukhamedov for their very valuable comments on earlier versions of this paper.

The authors also thank Aktam Azizov, UNCTAD Consultant, for implementation of a field survey of the dried fruit value chain in five regions of Uzbekistan in May-June 2019, as well as Danièle Boglio for desktop publishing and Catherine Katongola for administrative assistance.

This document has been edited by Mr. David Einhorn.

This document is part of the project Integrating Landlocked Commodity-Dependent Developing Countries into Regional and Global Value Chains (<https://unctad.org/project/integrating-landlocked-commodity-dependent-developing-countries-regional-and-global-value>), which is funded under the 2030 Agenda for Sustainable Development Sub-Fund of the United Nations Peace and Development Trust Fund (UNPDF).

Material in this publication may be freely quoted or reprinted, but acknowledgement is requested, together with a copy of the publication containing the quotation or reprint to be sent to the UNCTAD secretariat.

Contacts:

UNCTAD

Division on International Trade and Commodities

Commodities Branch

Geneva, Switzerland

Email: commodities@unctad.org

Tel: +41 22 917 6286

ACRONYMS

BRC	British Retail Consortium	GAP	Good Agricultural Practices
CBI	Centre for the Promotion of Imports	GDP	Gross domestic product
CIS	Commonwealth of Independent States	HACCP	Hazard analysis critical control point
EFSA.....	European Food Safety Authority	IFS.....	International Featured Standards
EU	European Union	ISO	International Organization for Standardization
FAO	Food and Agriculture Organization	ITC	International Trade Centre
FRUCOM	European Federation of the Trade in Dried Fruit, Edible Nuts, Processed Fruit and Vegetables and Processed Fishery Products, Honey and Similar Foodstuffs	RASFF	Rapid Alert System for Food and Feeds
		SDG.....	Sustainable Development Goal
		USDA	United States Department of Agriculture

NOTES

Use of the term “dollar” (\$) refers to United States dollars.

The term “billion” signifies 1,000 million.

The term “tons” refers to metric tons.

Use of a dash between years (e.g. 2000–2001) signifies the full period involved, including the initial and final years.

An oblique stroke between two years (e.g. 2000/01) signifies a fiscal or crop year.

CONTENTS

1.	Introduction and background.....	1
2.	The international market for dried fruits.....	3
2.1	Global production, exports, imports and consumption	4
2.1.1	Dried grapes.....	7
2.1.2	Prunes	9
2.1.3	Dried apricots.....	10
2.2	The role of prices	12
2.3	The current role and recent evolution of Uzbekistan exports of dried fruit	15
3.	Key characteristics of the export value chain for international competitiveness.....	21
3.1	Producers.....	24
3.1.1	Producer size and location.....	24
3.1.2	Fruit production and drying.....	25
3.1.3	Farmer sales.....	28
3.2	Fruit buyers and quality	30
4.	Logistics and export procedures.....	33
5.	Trade standards	39
5.1	Regulatory standards for dried fruit	40
5.2	Commercial standards for dried fruit	41
5.3	Uzbekistan and international standards for dried fruit	42
5.4	Fostering the capacity of Uzbek dried fruit exporters to meet standards.....	43
5.5	Export promotion strategy for dried fruits.....	44
6.	Conclusions.....	47
Appendix 1.	International Trade Centre world dried fruit trade data	50
Appendix 2.	United States Department of Agriculture world dried fruit trade data.....	58



1. Introduction and background

The agricultural sector plays a key role in the Uzbek economy. The World Bank has estimated that agriculture constituted 31 per cent of Uzbek growth in value-added per employee in the two decades up to 2016. Recognizing that raising agricultural productivity by accelerating market reforms in agriculture is an important medium-term goal to increase growth and reduce poverty – and thereby meet Sustainable Development Goal (SDG) 8 (“Decent Work and Economic Growth”) and SDG 1 (“No Poverty”) – the World Bank points to expanding access to markets and accelerating the shift from cotton and wheat cultivation to horticulture and other higher-value crops as instrumental in this process.¹ Additionally, development of the fruit value chain can also foster incomes of women. A survey conducted by the United Nations Conference on Trade and Development (UNCTAD) for this study indicated that 58.6 per cent of the workforce of surveyed fruit farmers were women, employed in particular as temporary workers. Temporary female workers constituted 49.7 per cent of the workforce of the fruit farmers surveyed, but only 8.9 per cent of permanent workers.

Dried fruit constitute an important part of the agricultural sector of Uzbekistan in terms not only of current production and export, but also potential. The international dried fruit market notably includes dried grapes, which account for most of the global market of dried fruit and dominate Uzbek exports, and all other fruits, principally apricots, prunes and apples, but also including peaches, pears, papaws, papayas, tamarinds and other edible fruits.² The fruit sector overall is the sixth largest sector in Uzbekistan’s export profile,³ earning the country US\$644 million in 2019. Edible fruits accounted for 4.5 per cent of Uzbekistan’s total exports of US\$14.3 billion in 2019.⁴ Within edible fruit exports, dried grapes accounted for US\$105 million, or 16.3 per cent, and other dried fruits, notably including prunes, dried apricots and dried apples, accounted for US\$40 million, or 6.2 per cent. Together, therefore, in 2019 dried fruit accounted for 1 per cent of the entire export value of Uzbekistan. Thus, it is clear that dried fruit exports, and developing appropriate methods to increase them, is important for the development of the Uzbek economy.

The findings in this paper and their associated policy implications build upon, complement and reinforce previous research findings by other development partners working in the horticultural and fruit sectors in Uzbekistan, such as the World Bank and the Food and Agriculture Organization (FAO) of the United Nations.⁵ Specifically, this study considers the current status and future prospects of Uzbek dried fruit exports.

Section 2 of the study reviews global trade in dried fruits and the position of Uzbekistan within that trade. Section 3 analyses data from a purpose-built field survey conducted in five regions of Uzbekistan to show the importance of the value chain of dried fruit for the quality of the country’s exportable dried fruit. Section 4 discusses some important aspects of the logistics of dried fruit exports from Uzbekistan. Section 5 reviews the various trade standards that influence the export of dried fruit from Uzbekistan. Section 6 concludes by suggesting some pathways to improve both the volume and value of Uzbek dried fruit exports. These pathways are structured around four main ways to increase Uzbekistan’s share of the global dried fruit market. The first is a process to thoroughly foster quality along the entire fruit value chain, including dried fruit, that involves all stakeholders in the export value chain. The second is to improve logistics and export procedures. The third is to more actively engage with trade standards. And the fourth is to take an innovative, targeted and brand-focused approach to marketing. Turkey successful undertook such an approach for apricots (including dried apricots), and Uzbekistan, with patient effort, could potentially reproduce that approach for dried grapes.

预览已结束，完整报告链接和二维码如下：

https://www.yunbaogao.cn/report/index/report?reportId=5_8589

