



Food and Agriculture
Organization of the
United Nations



Agricultural value chain study in Iraq

**Dates, grapes,
tomatoes and wheat**



Agricultural value chain study in Iraq

Dates, grapes, tomatoes and wheat

Food and Agriculture Organization of the United Nations
Bagdad, 2021

Required citation:

FAO. 2021. *Agricultural value chain study in Iraq – Dates, grapes, tomatoes and wheat*. Bagdad. <https://doi.org/10.4060/cb2132en>

The designations employed and the presentation of material in this information product do not imply the expression of any opinion whatsoever on the part of the Food and Agriculture Organization of the United Nations (FAO) concerning the legal or development status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. The mention of specific companies or products of manufacturers, whether or not these have been patented, does not imply that these have been endorsed or recommended by FAO in preference to others of a similar nature that are not mentioned.

The views expressed in this information product are those of the author(s) and do not necessarily reflect the views or policies of FAO.

ISBN 978-92-5-133634-2

© FAO, 2021



Some rights reserved. This work is made available under the Creative Commons Attribution-NonCommercial-ShareAlike 3.0 IGO licence (CC BY-NC-SA 3.0 IGO; <https://creativecommons.org/licenses/by-nc-sa/3.0/igo/legalcode>).

Under the terms of this licence, this work may be copied, redistributed and adapted for non-commercial purposes, provided that the work is appropriately cited. In any use of this work, there should be no suggestion that FAO endorses any specific organization, products or services. The use of the FAO logo is not permitted. If the work is adapted, then it must be licensed under the same or equivalent Creative Commons licence. If a translation of this work is created, it must include the following disclaimer along with the required citation: "This translation was not created by the Food and Agriculture Organization of the United Nations (FAO). FAO is not responsible for the content or accuracy of this translation. The original [Language] edition shall be the authoritative edition."

Disputes arising under the licence that cannot be settled amicably will be resolved by mediation and arbitration as described in Article 8 of the licence except as otherwise provided herein. The applicable mediation rules will be the mediation rules of the World Intellectual Property Organization <http://www.wipo.int/amc/en/mediation/rules> and any arbitration will be conducted in accordance with the Arbitration Rules of the United Nations Commission on International Trade Law (UNCITRAL).

Third-party materials. Users wishing to reuse material from this work that is attributed to a third party, such as tables, figures or images, are responsible for determining whether permission is needed for that reuse and for obtaining permission from the copyright holder. The risk of claims resulting from infringement of any third-party-owned component in the work rests solely with the user.

Sales, rights and licensing. FAO information products are available on the FAO website (www.fao.org/publications) and can be purchased through publications-sales@fao.org. Requests for commercial use should be submitted via: www.fao.org/contact-us/licence-request. Queries regarding rights and licensing should be submitted to: copyright@fao.org.

Cover photograph:

(from top left to bottom right clockwise):

©Nakd Khamis (wheat), ©FAO (tomatoes), ©FAO (dates with a boy) and ©REACH initiatives (grapes)

CONTENTS

Acknowledgements	VI
Abbreviations and acronyms	VII
Executive summary	IX
1. Introduction	1
1.1 Background of the study and objectives	1
1.2 Methodology	2
1.3 Limitations of the study	6
1.4 Brief overview of the agricultural sector in Iraq	7
2. End-markets	11
2.1 National market	11
2.2 Export markets	11
3. Value chain analysis	13
3.1 Wheat	13
3.2 Tomatoes	26
3.3 Grapes	36
3.4 Dates	44
4. Systemic constraints and upgrading opportunities	55
4.1 Trade	58
4.2 Value chains' governance	58
5. Vision and strategy for improved competitiveness and growth	61
5.1 Strategic issues synthesis	61
5.2 Value chain competitiveness strategy	62
5.3 Proposed strategy components	66
5.4 Next steps	66
References	67

FIGURES

Figure 1. Fluctuation of the contribution of the primary sector to GDP and variation of GDP growth by year (Elab. of World Bank data)	7
Figure 2. Availability and quality of extension Services	8
Figure 3. Wheat production in Iraq, 2000-2019 (FAOSTAT, " Data ," accessed June 2019)	13
Figure 4. Map of the wheat value chain	15
Figure 5. Source of water for the wheat farmers in each agro ecological zone (Elab. on primary data)	17
Figure 6. Climate change affecting wheat producers	17
Figure 7. Productive assets owned, and investments needed and planned by farmers in the wheat value chain.	19
Figure 8. Wheat - area harvested, production and yield 2015-2018, -FAO Data	21
Figure 9. Application of GAPs for wheat production.	22
Figure 10. Satisfaction of the government support	22
Figure 11. Tomatoes - area harvested, production and yield 2015-2018, -FAO Data	27
Figure 12. Tomatoes value chain map	28
Figure 13. Key factors for success or failure in the tomato value chain according to survey respondents.	29
Figure 14. Applied GAPs in tomato production (Elab. on primary data)	31
Figure 15. Grapes - area harvested, production and yield 2015-2018, FAO Data	37
Figure 16. Perception of grapes VC's actors about the status of business compared to the previous year	37
Figure 17. Value chain map of grapes	38
Figure 18. Used GAPs in grapes value chain	39
Figure 19. Dates production and yields in Iraq, 2000-2017 – FAO DATA	44
Figure 20. Dates value chain map	45
Figure 21. Key factors for the development of the dates value chain	49
Figure 22. Dates - area harvested, production and yield 2015-2018, -FAO Data	50
Figure 23. Challenges, irrigation technologies, source, quality, and availability of water in dates value chain in Baquba	051

TABLES

Table 1. Reference Crops against Selection Criteria (Elaborated by the VC's team based on secondary data and KIIs)	3
Table 2. Interviews by governorate	4
Table 3. Detailed record of interviews.	5
Table 4. Location and gender of FDGs	6
Table 5. Use of land for wheat cultivation	20
Table 6. Land Ownership	21
Table 7. Price of wheat by grade in 2019 and 2018.	23
Table 8. Distribution of the actors interviewed along the tomatoes value chain	26
Table 9. Geographic distribution of land (dunums) cultivated in the tomato value chain	26
Table 10. Irrigation techniques for tomatoes	29
Table 11. Percentage of losses in the tomatoes value chain (Elab. on primary data)	32
Table 12. Establishments of tomato processing (Source: Gain Report, March 2011, Iraq Food Processing Sector)	33
Table 13. Composition of the panel for the value chain of grapes	36
Table 14. Consumption and production of grapes Iraq and World (2016)	36
Table 15. Source of water and Irrigation technologies in grapes production	39
Table 16. Percentage of losses along the supply chain of the product as reported by the interviewed value chain actors.	41
Table 17. Distribution of the interviewed in the dates VC)	46
Table 18. Applied GAPs in the dates value chain	46
Table 19. Percentage of losses in the dates value chain	51
Table 20. SWOT analysis	62

ACKNOWLEDGEMENTS

The Food and Agriculture Organization of the United Nations (FAO) in Iraq would like to thank a number of partners for their support in generating this very informative report on the value chains of dates, grapes, tomatoes and wheat in Iraq that is to be used by members of the Food Security Cluster, the Donor Coordination Group on Agriculture and Water, the Government of Iraq as well as the private sector. In particular, thanks is due to:

- the REACH Initiative team for conducting the assessment, covering survey instrument design, data collection, analysis and report writing. A special thanks to Mr Gianluca Nocera, as the lead consultant on the project;
- the Ministry of Agriculture (MoA) and the respective governorate directorates for connecting the research team with farmers and value chain actors for this assessment;
- many thanks to the World Food Programme in Iraq (WFP) for their financial support as well as technical support from their VAM and M&E team led by Fawad Raza for reviewing the report and providing valuable feedback. Thanks also to Saman Ahmed, Mosa Dahab, Najla Suhail, Khansaa Ghazi and Neiaz Ibrahim for coordinating the key informant discussions with the government officials and other stakeholders;
- farmers, value chain actors and key informants who informed this exercise and for whom this research aims to deliver benefits;
- Jozimo SantosRocha and Jennifer Smolak from the Agribusiness and Value Chains team in Cairo (FAO's Regional Office for the Near East and Northern Africa) for their detailed comments; and finally
- the team from FAO-Iraq itself - under guidance of Dr. Salah Hajj Al Hassan (FAO Representative) a core team of experts contributed to the design, data collection, analysis, review and editing of the report: Rene Verduijn (lead), Sarah Barnhart, Sami Bilal, Khalid Shlash, Nakd Khamis and Farooq Malazada.

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_1929

