

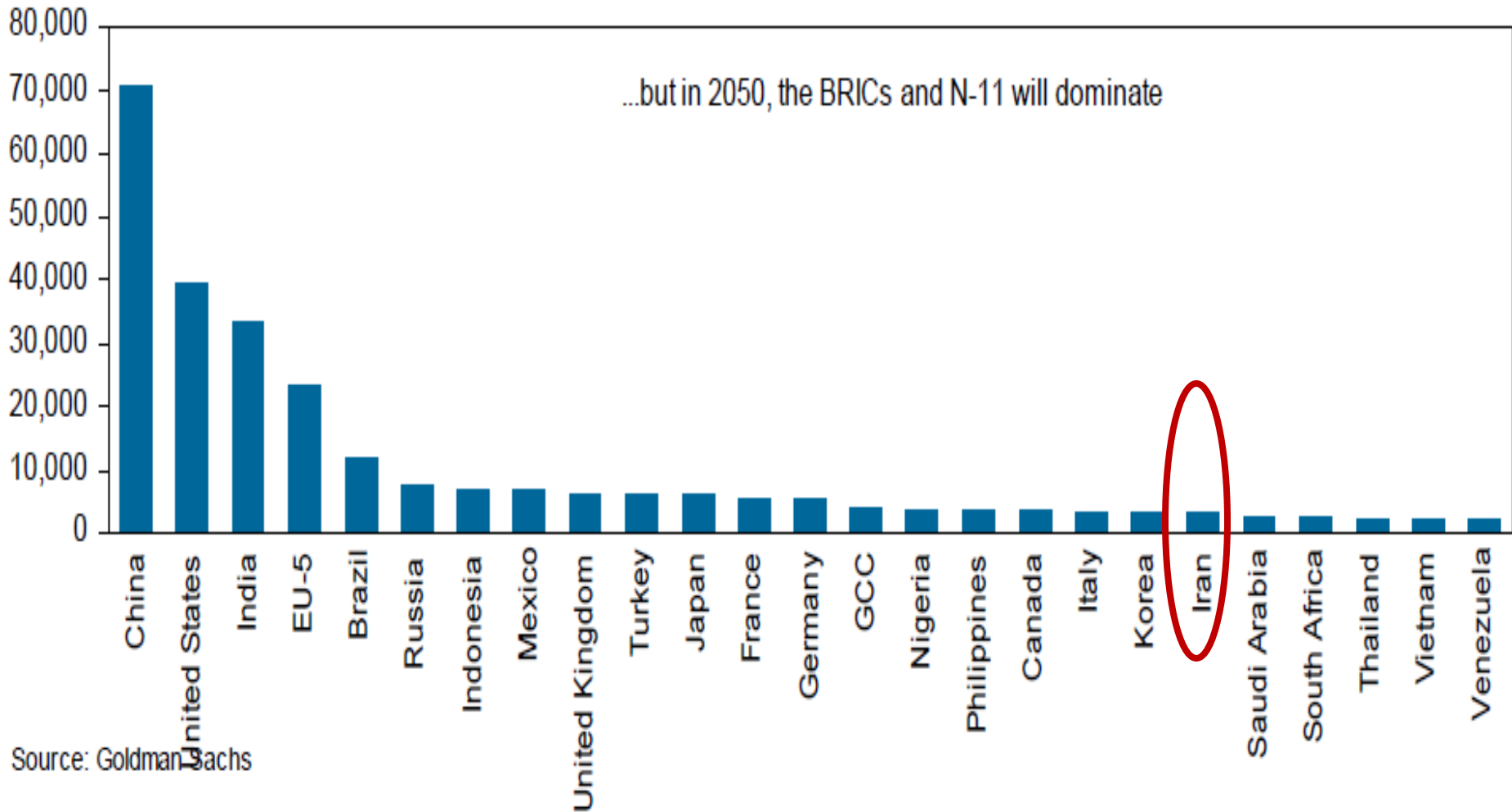
IRAN AGRI TRADE PROSPECRIVE

DEC. 7, 2014

Iran in 2050

GDP 2007 US\$bn

The World in 2050



Source: Goldman Sachs

Iran at a Glance: Economy 2014

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- **GDP:** ~\$ 987.1 trillion (2013 est.)
 - **GDP per Capita:** \$9,207
 - **GDP per Capita (PPP):** \$12,986
 - **GDP Growth:** -1.5% (2013 est.)
 - **Inflation(CPI):** 42.3% (February 2013)
 - **Unemployment Rate:** 16% (2013 est.)
 - **Exports:** \$ 61.22 billion (2013 est.)
 - **Imports:** \$ 64.42 billion (2013 est.)
 - **Foreign Reserves:** ~\$ 69.86 billion (31 December 2013 est.)

Source: CIA WORLD FACTBOOK
February 21, 2014

Geography and Main Industrial Regions

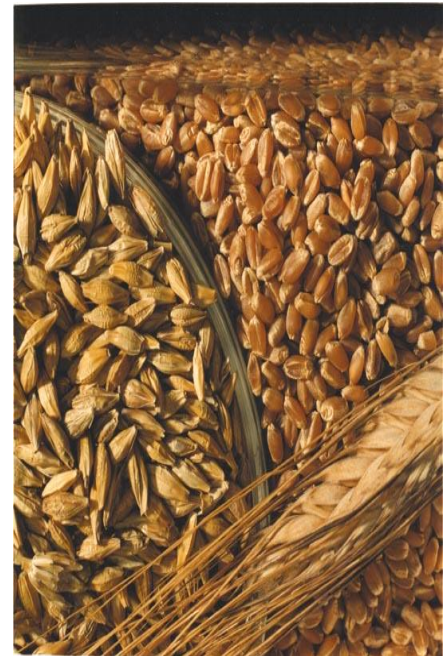


- Land: 1,648,195 km²
- Coastline: 2440 km
- Land Borders:
 - Turkey
 - Iraq
 - Afghanistan
 - Pakistan
 - Turkmenistan
 - Azerbaijan
 - Armenia

- Number of Provinces: 30
- Largest Cities:
 - Tehran
 - Mashhad
 - Tabriz
 - Isfahan
 - Shiraz
 - Ahvaz

Iran's Advantages & Grain Trade

- Iran neighboring **15** countries (by land & sea)
- **9** of landlocked countries would be able to reach international waters through Iran
- Iran has undeniable geopolitics advantages to connect East to West & North to South
- Wheat production around Iran: **33** million ton



Iran's agricultural Characteristics

- Access to 37 million hectares of productive land
- 102.4 million hectares of forests and grasslands
- 2700 kilometers of water border

Iran's agricultural Sector

- Roughly one-third of Iran's total surface area is suited for farmland, but because of poor soil and lack of adequate water distribution in many areas, most of it is not under cultivation.
- About 12 percent of the country's total land area of 1,636,000 km² is cultivated.
- 185,000 km² of the present farms are being used with 50 to 60% capacity.
- It accounts for almost 11% of Iran's GDP
- 23% of the employed population
- 15% of foreign exchange revenues (from non oil exports),
- 82% of domestically consumed food stuff
- 90% of raw materials used in the food processing industry

Iran's agriculture

- In 2012 Land use: arable land: 10.5%, irrigated land: 87,000 Sq Km
- As of 2013, The amount of cultivated land that is irrigated increased to 8 million hectares, while 10 million hectares remain rain-fed.
- The country provides about 70% of the total agri-food products still it is a large importer of agricultural products, in addition to the technology and equipment required for this sector

Iran's agricultural Characteristics

- Climatic diversity - Iran produces a wide range of agricultural products, such as;
 - Pulses
 - Citrus fruits
 - Sugar cane
 - Wheat
 - Barely
 - Rice
 - Tea
- Benefiting from a substantial portion of the cultivated lands, and government & guaranteed purchase, wheat accounted for about **53%** of the cultivated lands in Iran

Agricultural Facts Iran

- Iran holds the first ranking in the world in production of Pistachio, Saffron, Caviar; second in Dates and third in Cherries.

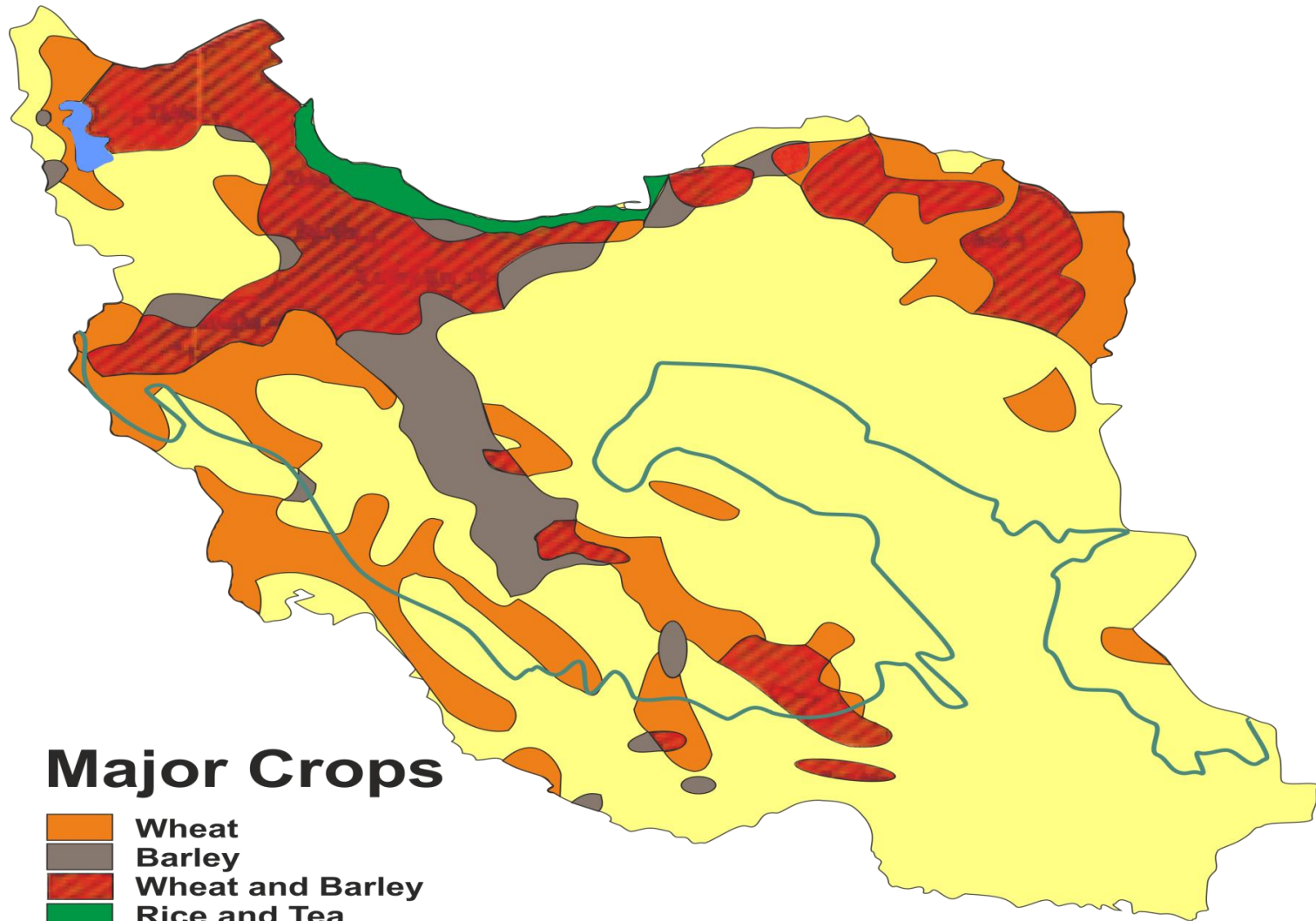


Export

- In 2013 total export amounts were \$61.22 billion.
- In 2013 total exports of agricultural products were \$3.1 billion – mainly fruit and nuts.
- Close to 8 million tons of agricultural products are exported annually
- The growth rate of the export of agricultural products is about 33%
- Pistachio, saffron, caviar & dates are the first four exported products
- Iran also exports some other important agricultural products, such as, medical plants, decorative flowers and plants, as well as livestock products

Import

- The main imported products are:
 - Refined sugar
 - Rice
 - Soybean
 - Sunflower oil
 - Corn
 - Palm oil
 - Barley
 - Wheat
 - Fish & animal feed
 - Additives
 - Fertilizers & fertilizer raw materials
 - Agricultural equipment



Major Crops

- Wheat
- Barley
- Wheat and Barley
- Rice and Tea
- Dates

Wheat in Iran

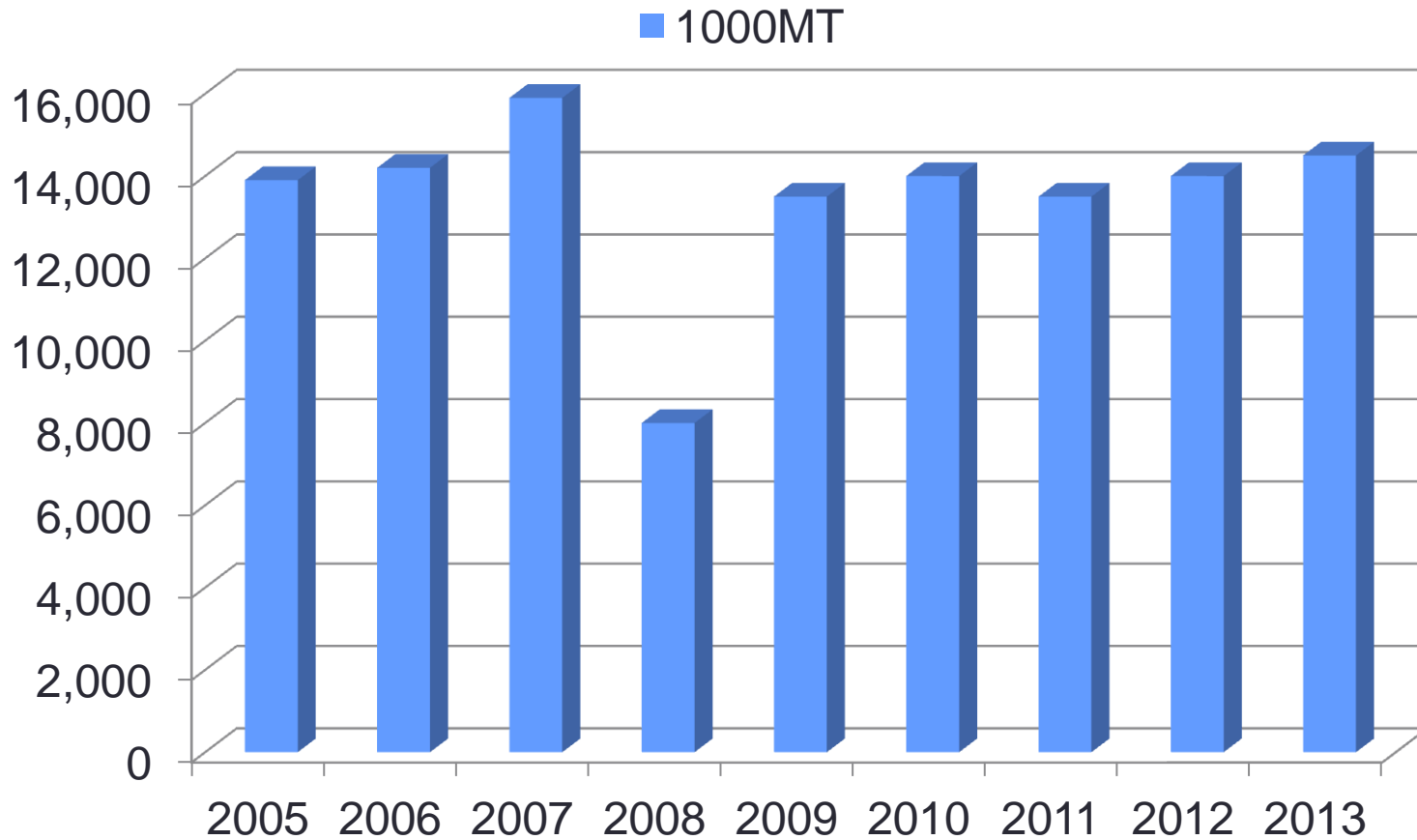
- Iran produced 14 million tons of Grain in 2010 and 13 million tons in 2014
- Iran achieved self-sufficiency in 2004
- In 2009 Iran was the largest importer of wheat in the world from 15 countries around 6 million tons because of drought in 2008
- 60% of production grown in dry land
- Annual consumption is 10.8 million tons (all purposes)
- Country's stock is about 4.0 million tons
- Annual Average Import growth rate
 - 1996-2003: 5.2 million tons
 - 2004-2013: 1.9 million tons
- Annual Average Exports
 - 2010: 770,000 tons
 - 2013: 200,000 tons



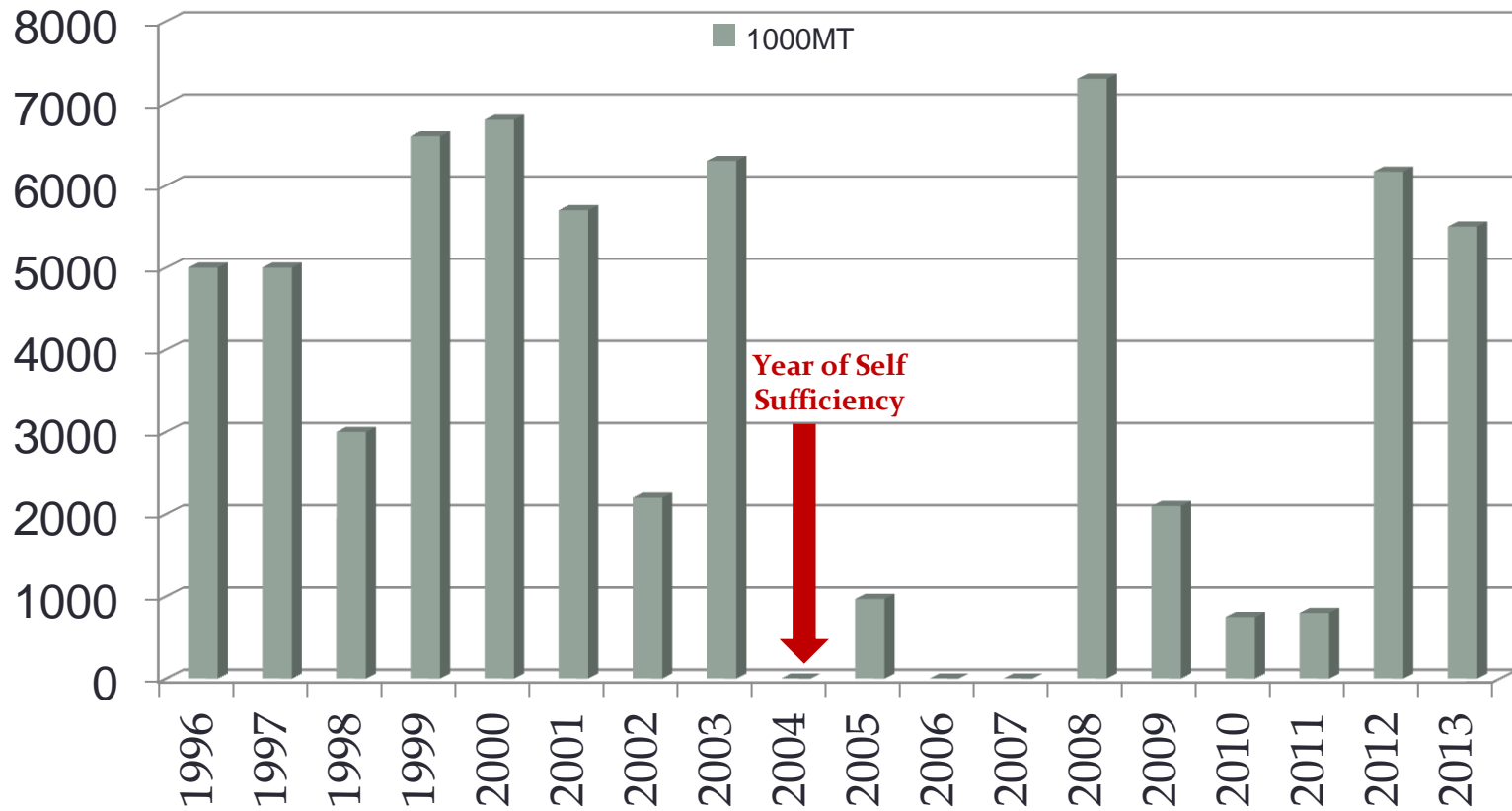
Land Under Cultivation – Wheat

- In 2012-2013 harvested wheat was estimated around 7 million hectare of which:
 - 36.75 % irrigated
 - 63.25% dry farming
- Wheat performance per hectare
 - Irrigated 3772.46 kg
 - Dry farming 1073.30 kg

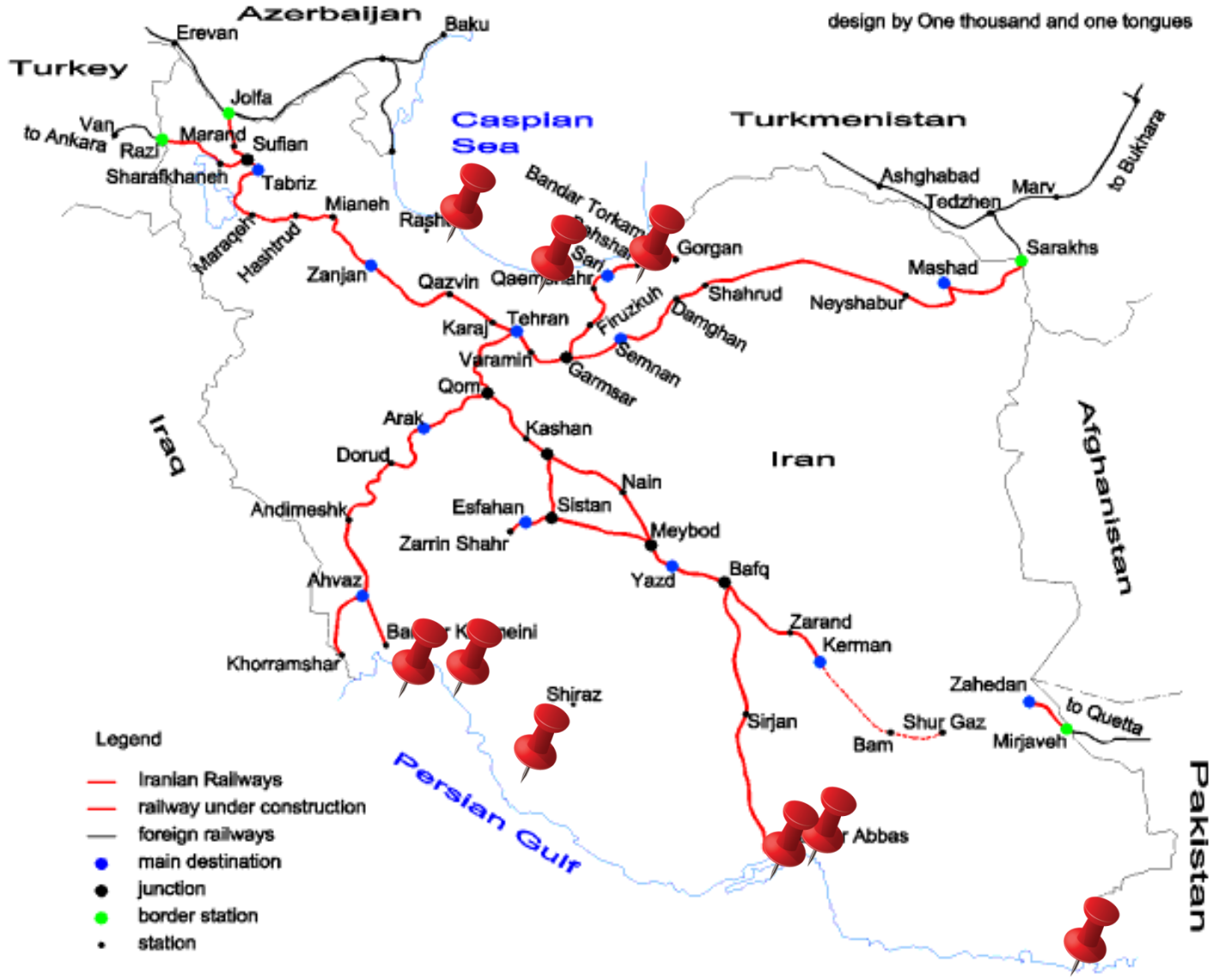
Wheat in Iran – Production



Wheat in Iran - Imports



Iran Railways & Ports Map



Iran Ports

- **South Ports: 10** (Imam Khomeini, Shahid Rajaei, Shahid Bahonar, Bushehr, Chabahar,, Khoramshahr, Abadan, Lengeh, Kharg, Assaluyeh)
- **North Ports: 3** (Anzali, Nowshahr, Amirabad, Fereydoon Kenar)



Flour Fortification in Iran

- Flour Fortification initiated by WHO in later 1990's
 - Iran's Milling Industry was first evaluated in 2001.
 - Government of Iran passed in 2005, requiring wheat flour fortification.
 - The first Pilot Project was done in Bushehr, and KFF Mills in Shiraz
 - More than 335 Mills were required to have fortification equipment and staff training.
 - Results from a study has shown a 30% reduction in NTD rates after fortification.
 - Iran's sustainable fortification system and an effective monitoring system has become a noteworthy example for other countries considering improved health.

THANK YOU

