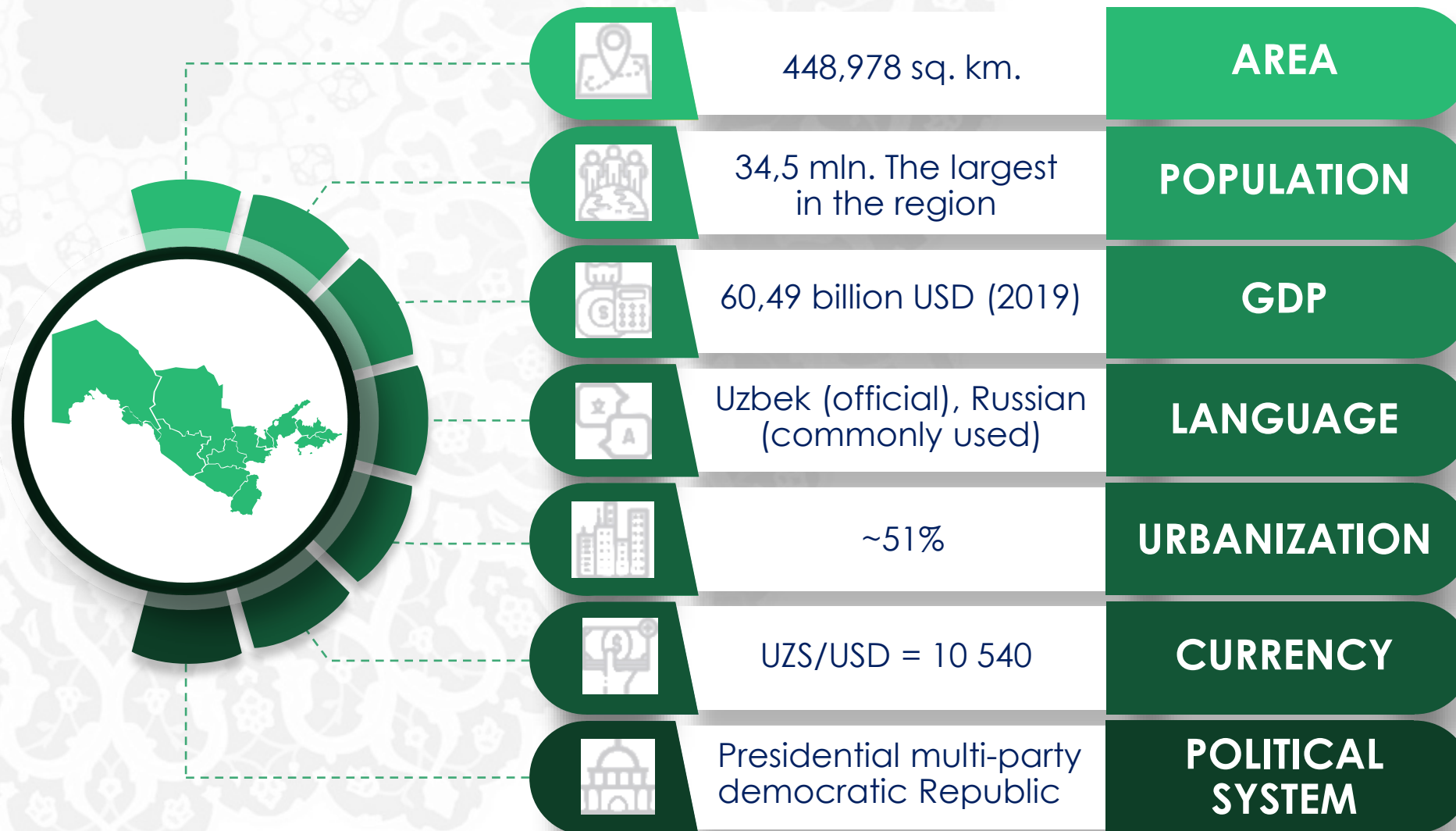
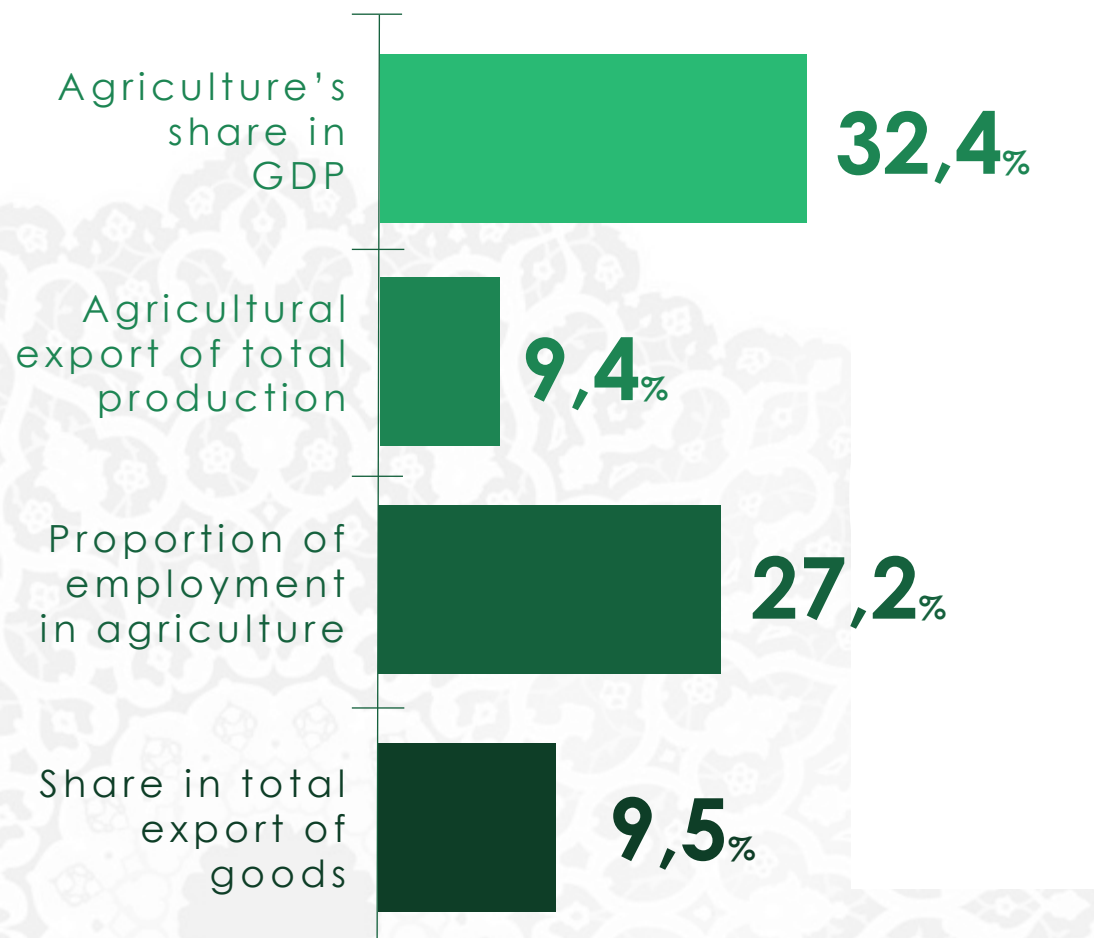


AGRICULTURE POTENCIAL OF UZBEKISTAN

COUNTRY OVERVIEW



SHARE OF AGRICULTURE IN GDP



THE AGRICULTURAL SECTOR OF THE COUNTRY



REFORMS IN THE AGRICULTURAL SECTOR



Agriculture development strategy for 2020-2030

Government removed order of setting price of wheat

Rejection of raw cotton

Digital agriculture



Agriclusters

Ensuring a full production cycle

Increasing production, storage, processing and export of agricultural products

Clusters for:

- Grain
- Livestock
- Fish
- Poultry
- Horticulture



Cooperatives

Agricultural enterprises

Farm and dekhkan households

Owners of household plots



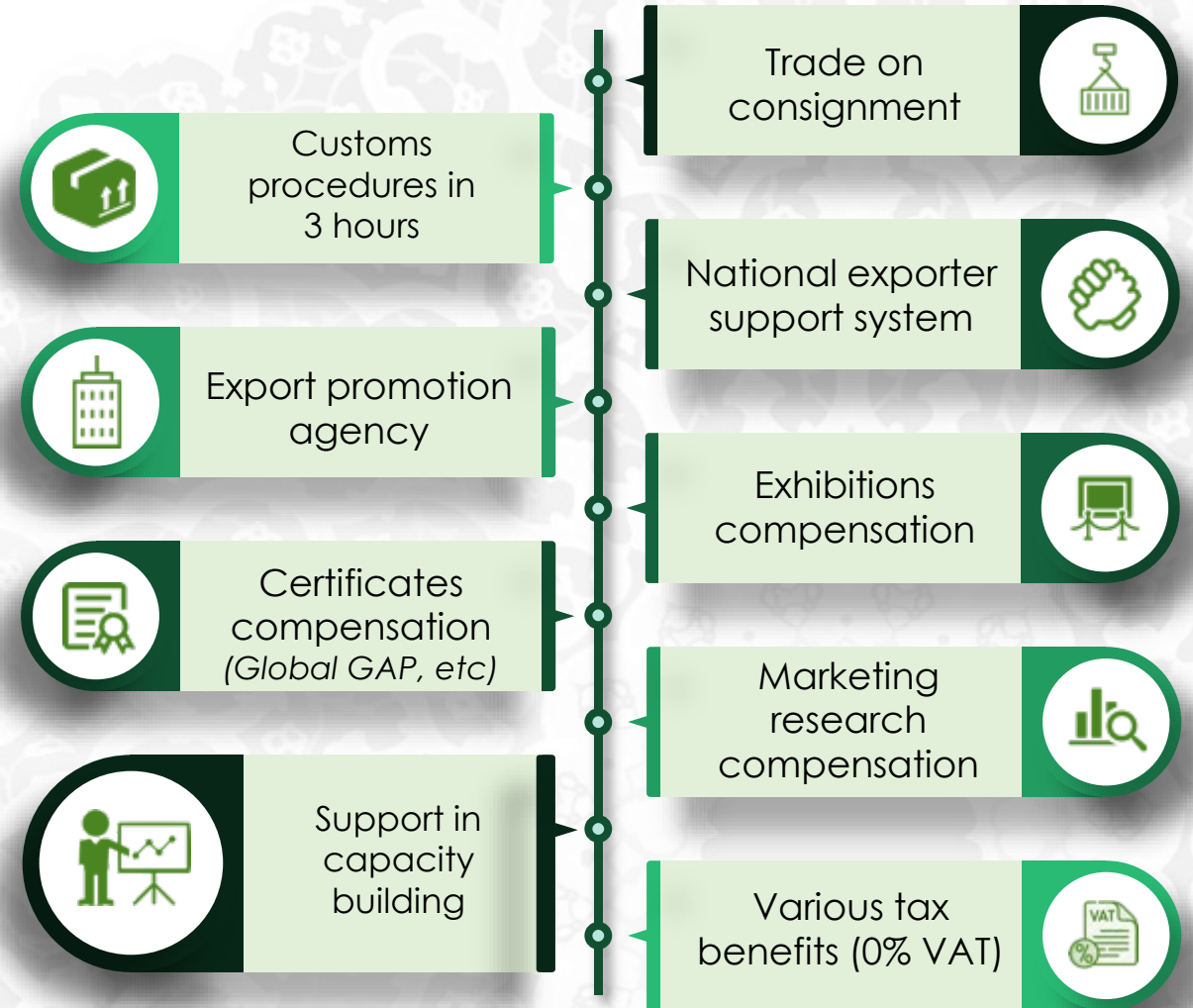
Development of wholesale distribution centers (WDC)

8 large and 37 small WDC

3,4 mln. tons
Total capacity

545,8 mln. USD
WDC cost

EXPORT LIBERALIZATION



ROLE OF MINISTRY IN DEVELOPMENT OF AGRICLUSTERS



EXPORT OF AGRICULTURE

2nd

Dried apricot

3rd

Persimmon

4th

Dried grapes

4th

Apricot

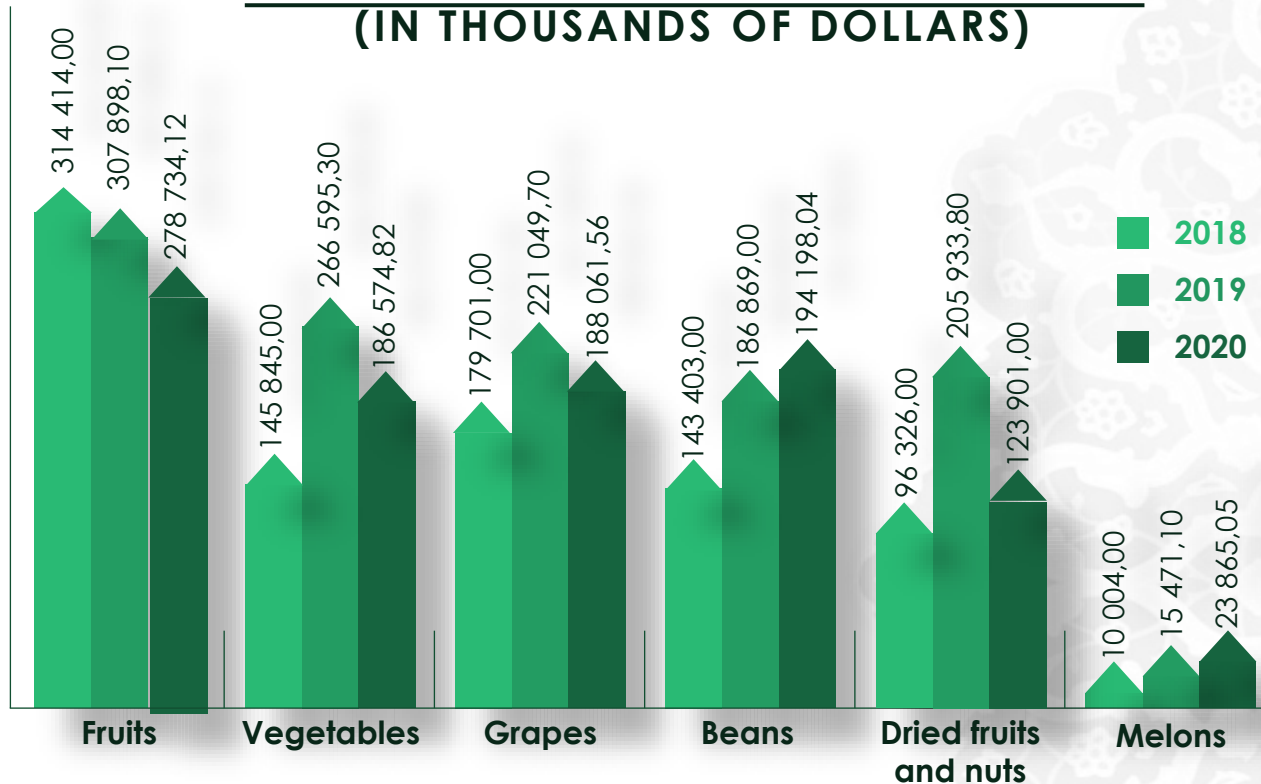
5th

Dried plum

5th

Cherry

EXPORT OF FRUITS AND VEGETABLES (IN THOUSANDS OF DOLLARS)



Grapes – 132 948,68 USD

Cabbage - 34,11USD

Beans – 194 198,04 USD

Persimmon – 48 592,9 USD

Dried grapes – 55 112,88 USD

Walnut – 14 782,31 USD

Apricot – 49 089,50 USD

Almond – 9 651,35 USD

Onion – 34 353,6 USD

Greens – 20 498,62 USD

Tomato – 65 976,48 USD

Plum frozen - 22 109,9 USD

Pepper - 666,41 USD

Carrot – 7 086,03 USD

Cherry – 60 477,63USD

Apple – 8 771,45 USD

Peach – 65 247,55 USD

Peas - 976,44 USD

Mung beans – 85 494,67 USD

Cucumber – 6 419,13 USD

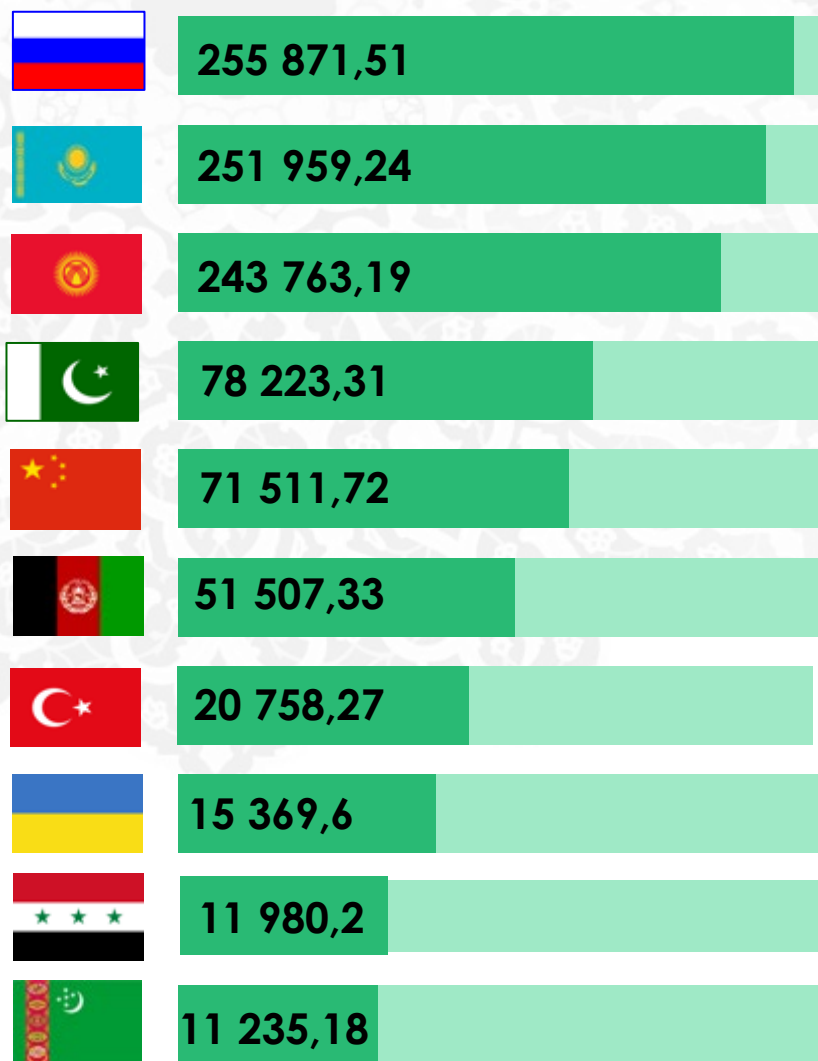
Plum – 13 919,86 USD

Lemon – 8 543,71 USD

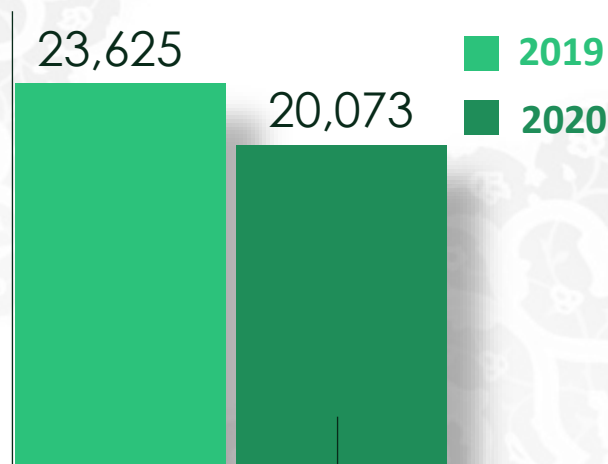
Pomegranate – 18 525,94 USD

EXPORT GEOGRAPHY

TOP IMPORTERS (mln. USD)



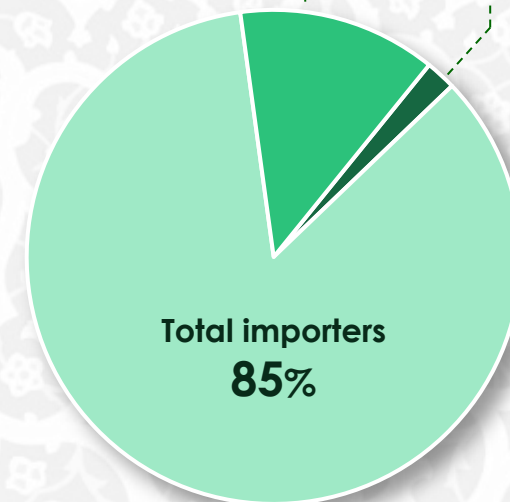
EXPORT TO EUROPEAN COUNTRIES (mln. USD)



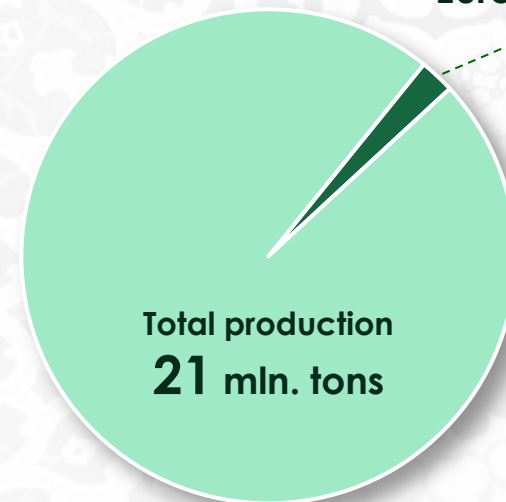
TOP EUROPEAN IMPORTERS (in thousands of dollars)

GERMANY – 6 785,99
 LATVIA – 2 397,71
 LITVA – 1 544,28
 POLLAND – 1 398,94
 FRANCE – 1 314,47
 ITALY – 1 254,08

Other countries 13% European countries 2%



European countries >0,1%





Global GAP

2 certificates in **2018**

39 certificates in **2019**

More than **10** exhibitions annually in the EU countries, including **3** in Germany.



More than **50** marketing research reports

Almonds

General Information:

The almond is a traditional deciduous tree for Uzbekistan.

Almonds begin bearing an economic crop in the third year after planting. Trees reach full bearing five to six years after planting.

Average yield 16 t/ha

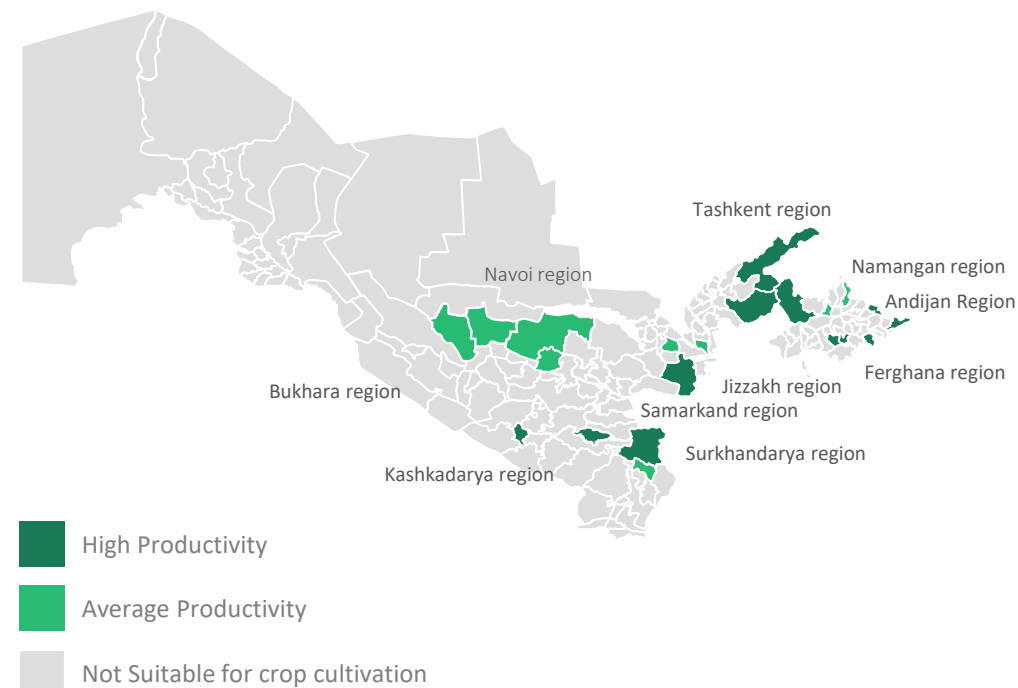
Farm Production Costs

Orchard establishment costs
fertilizers, pest management,
irrigation

Establishment costs 4900\$/ha

Return on investment
47000-50000 \$/ha

Agriculture Map for Decision Making



Almond Export Potential by 2030 1,5-1,6 billion USD

Main Export Markets:

- EU 800 million USD
- Gulf States 120-140 million USD
- China and CIS countries 40-50 million USD

Cherry (sweet and sour)

General Information:

Cherry is a traditional perennial crop, commercially grown in Uzbekistan.

Cherry producers in Uzbekistan have an advantage over producers in other regions as they produce fruit from late April to late June, which arrives first to export markets.

Average yield 20-22 t/ha

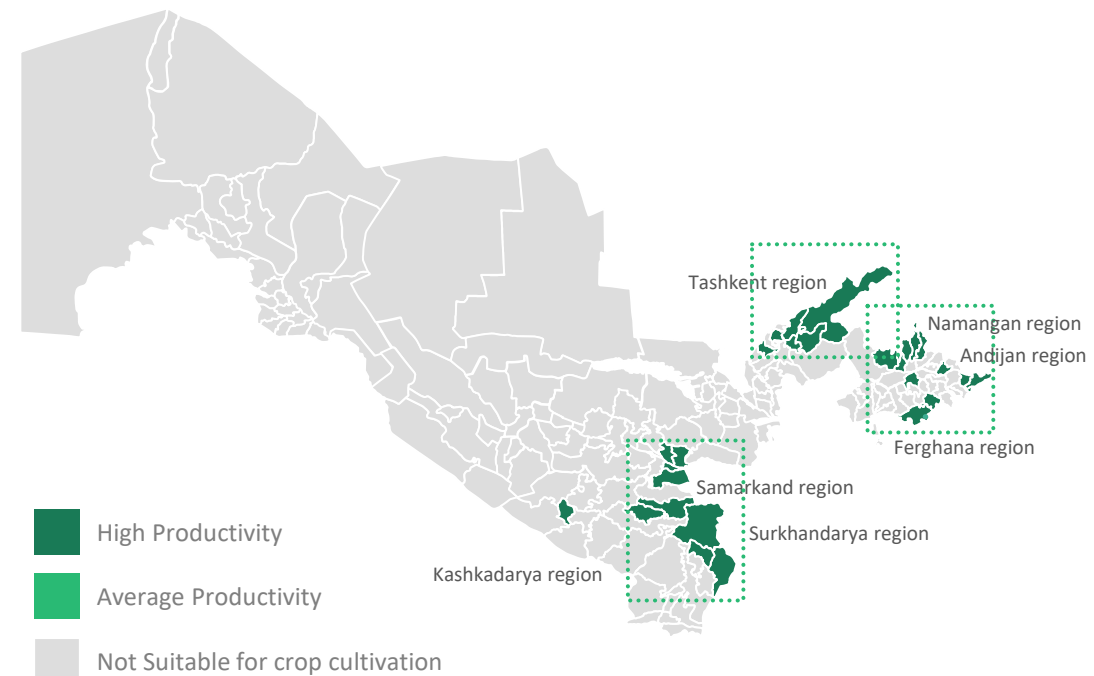
Farm Production Costs

Orchard establishment costs
fertilizers, labour, irrigation

Establishment costs 45000\$/ha

Return on investment
60000-65000 \$/ha

Agriculture Map for Decision Making



Almond Export Potential by 2030 400-500 million USD

Main Export Markets:

- South Korea 55-75 million USD
- China 90-120 million USD
- EU 70-85 million USD
- CIS countries 70-80 million USD

Walnut

General Information:

Walnut is a traditional perennial crop exported both peeled and unrefined.

Walnuts are fast growing trees that develop broad canopies reaching 18 m width and 30 m in height.

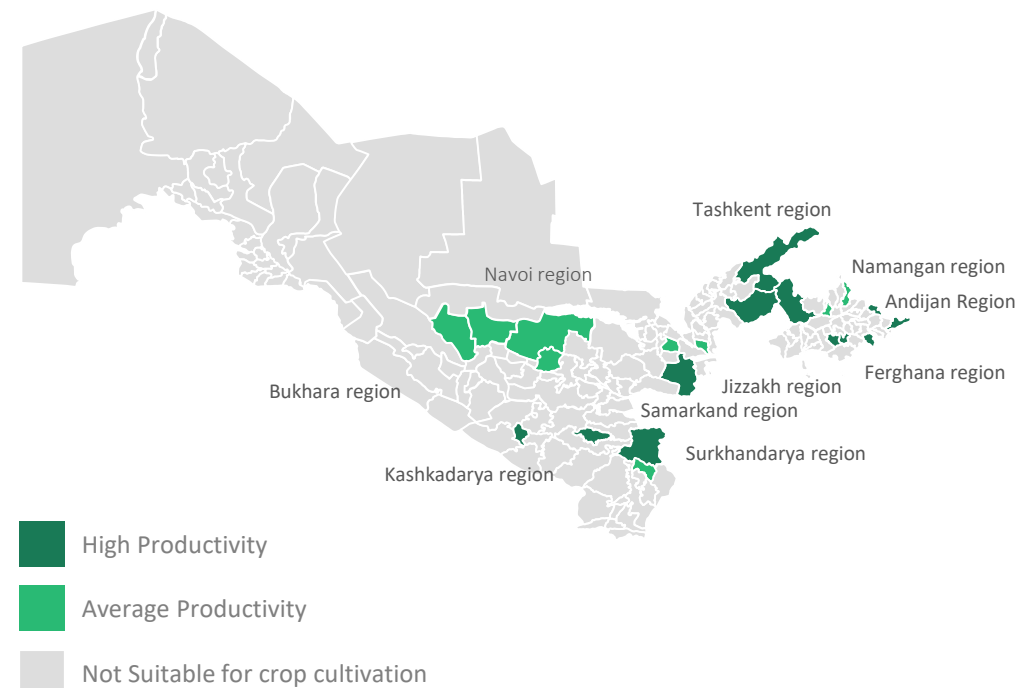
Average yield 7-8 t/ha

Farm Production Costs

During the first years after the orchard establishment, the investor can have an income from cereals or other crops that are often cultivated between walnut trees.

Return on investment
43000-47000 \$/ha

Agriculture Map for Decision Making



Walnut Export Potential by 2030 700-800 million USD

Main Export Markets:

- EU 350-450 million USD
- Gulf States 30-50 million USD
- South Korea 50-70 million USD
- Turkey 35-55 million USD

Pistachio

General Information:

The pistachio tree is native to regions of Central Asia.

The trees take approximately seven to ten years to reach significant production. Peak production is reached around 20 years.

Average yield 17-20 t/ha

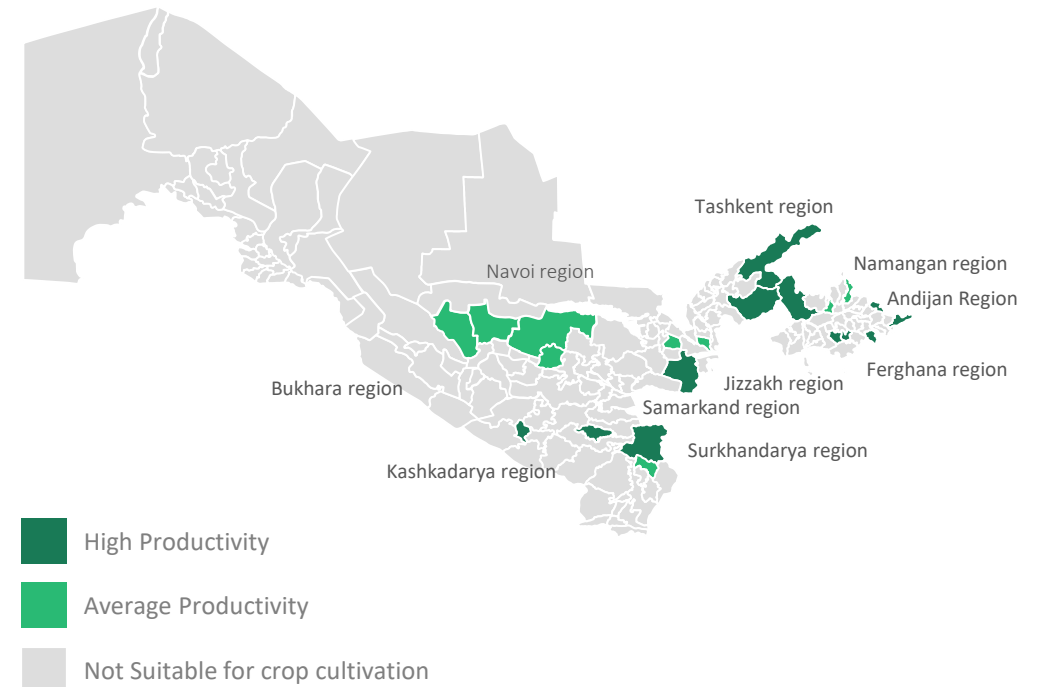
Farm Production Costs

fertilizers, pest management, irrigation

Establishment costs 2000\$/ha

Return on investment
100000 \$/ha

Agriculture Map for Decision Making



Pistachio Export Potential by 2030 720-750 million USD

Main Export Markets:

- EU 350-450 million USD
- CIS countries 25-35 million USD
- China 75-100 million USD

Peach

General Information:

Peach is a traditional perennial crop, commercially grown in Uzbekistan.

Typical peach cultivars begin bearing fruit in their third year.

Average yield 20-25 t/ha

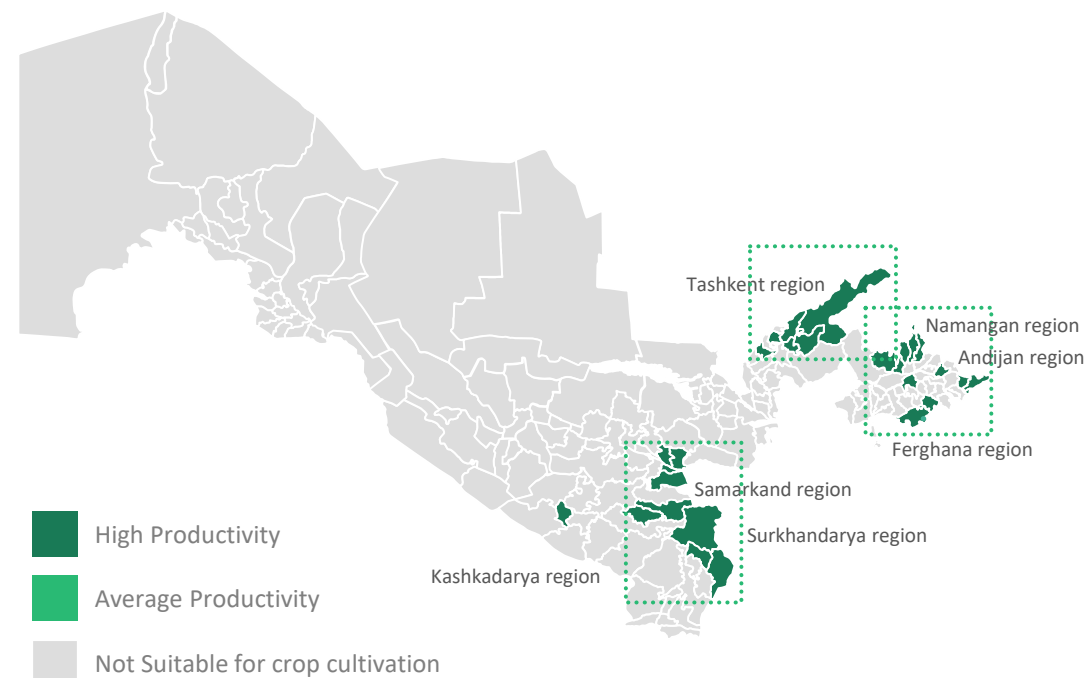
Farm Production Costs

Orchard establishment costs
fertilizers, labour, pest
management, irrigation

Establishment costs 10000\$/ha

Return on investment
18000-20000 \$/ha

Agriculture Map for Decision Making



Peach Export Potential by 2030 80-100 million USD

Main Export Markets:

- EU 25-30 million USD
- CIS countries 50-65 million USD

Plum

General Information:

Plums are a perennial crop with harvest season in June-August.

Typical peach cultivars begin bearing fruit in their third year.

Average yield 20-24 t/ha

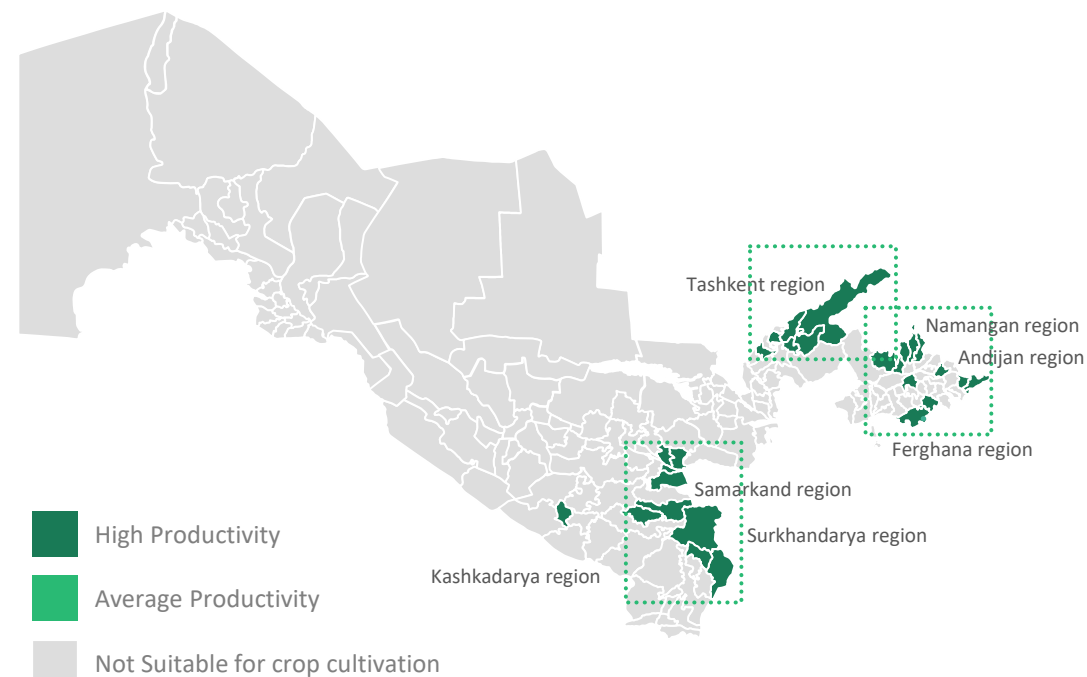
Farm Production Costs

Orchard establishment costs
agricultural machinery
fertilizers, labour, pest
management, irrigation

Establishment costs 10000\$/ha

Return on investment
15000-20000 \$/ha

Agriculture Map for Decision Making



Plum Export Potential by 2030 80-100 million USD

Main Export Markets:

- China 25-40 million USD
- CIS countries 45-55 million USD

Grapes

General Information:

Grapes are traditional perennial commercially grown product in Uzbekistan.

Grapes vines takes about 1.5 to 2 years after planting to bear the first crop

Average yield 21-24 t/ha

Farm Production Costs

Orchard establishment costs fertilizers, labour, pest management, irrigation

Establishment costs 4000\$/ha

Return on investment
25000-27000 \$/ha

Agriculture Map for Decision Making



Grapes Export Potential by 2030 480-510 million USD

Main Export Markets:

- EU 180-220 million USD
- China 30-50 million USD
- CIS countries 120-140 million USD

Raisins

General Information

Raisins are traditional commercially grown export oriented products.

There are 3 export oriented types of raisins: Sultanas, Currants, Raisins

Production Costs

Vineyards establishment costs:
~3300 \$/ha

- Purchase of full processing line (processing per 1 ha):
~1500 \$

Markets and Competitors

Raisins imports ~1,8 billion \$

Large importers EU, Japan, India, USA and Russia

Large exporters Turkey, USA, South Africa, Chile and Argentina

Uzbekistan exports ~75 million \$ (~5% of global imports),

Primary export markets China, EU and Russia

Raisins Export Potential by 2030
422 million USD





Peanut processed

General Information

Peanut are processed by dry roasting and for peanut butter production

Production Costs

Dry roasting line (221 tons)

~161000 \$

- Peanut butter production line (158tons): ~67000 \$

Markets and Competitors

Processed peanut imports ~1,7 billion \$

Large importers EU, Japan, and USA.

Large exporters Netherlands and China.

Uzbekistan exports ~1,6 million \$

Processed Peanuts Export Potential by 2030
153 million USD





Dried Apricots

General Information

Dried apricots are traditional commercially grown export oriented products.

Production Costs

- Orchard establishment costs
~2600 \$/ha
- Dried Apricot processing line
(312 tons annually) ~34500 \$

Markets and Competitors

Dried Apricots Imports ~390 million \$

Large importers EU, USA, India and Russia

Large exporters Turkey

Uzbekistan exports ~7 million \$ (~2% of global imports)

Raisins Export Potential by 2030
97 million USD



Prunes

General Information

Prunes are traditional commercially grown export oriented products.

Production Costs

Orchards establishment costs:

~1900 \$/ha

Purchase of full processing line
(production capacity 312 tonned
per year) ~34500 \$

Markets and Competitors

Prunes imports ~510 million \$

Large importers EU, Japan and Russia

Large exporters USA, Chile and Argentina

Uzbekistan exports ~17 million \$ (~4% of global imports),

Prunes Export Potential by 2030
125 million USD



Dried paprika peppers

General Information

Dried peppers are sold as ground or whole. There are several types of pepper, the most popular varieties are hot and sweet.

Production Costs

Purchase of full processing line(~312 tonnes annually)
~34500. \$

Markets and Competitors

Dried pepper imports ~1,6 billion \$

Large importers EU,USA and Thailand.

Large exporters India, China, Peru, Mexico.

Uzbekistan exports ~11 million \$

Primary export markets Russia, Kazakhstan, Germany and Turkey

Dried paprika pepper export Potential by 2030
249 million USD



The background is a solid green color. It features several geometric shapes: a dark green trapezoid in the top-left corner, a light green trapezoid in the top-right corner, a white trapezoid in the bottom-left corner, and a dark green trapezoid in the bottom-right corner. A thin white horizontal line runs across the middle of the image, starting from the left edge and ending at the right edge.

**THANK YOU
FOR ATTENTION**