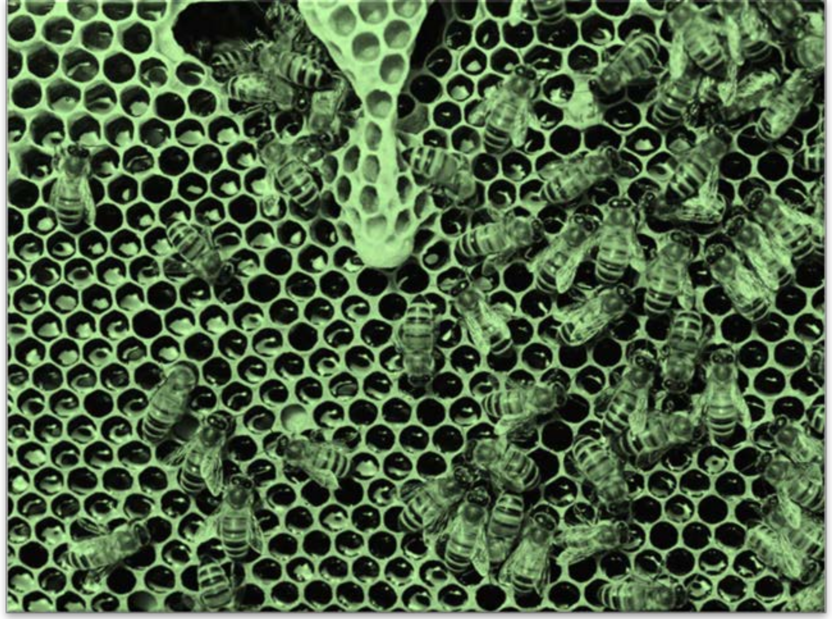
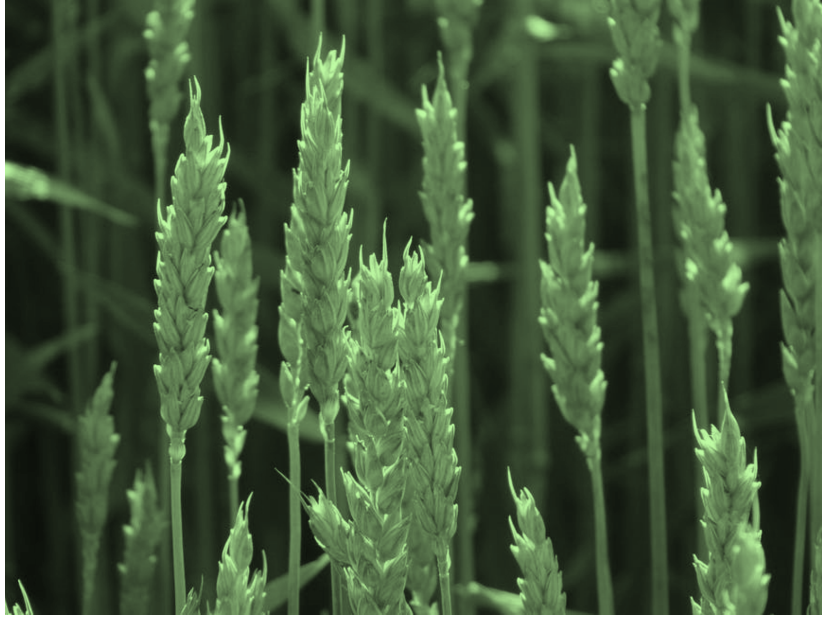
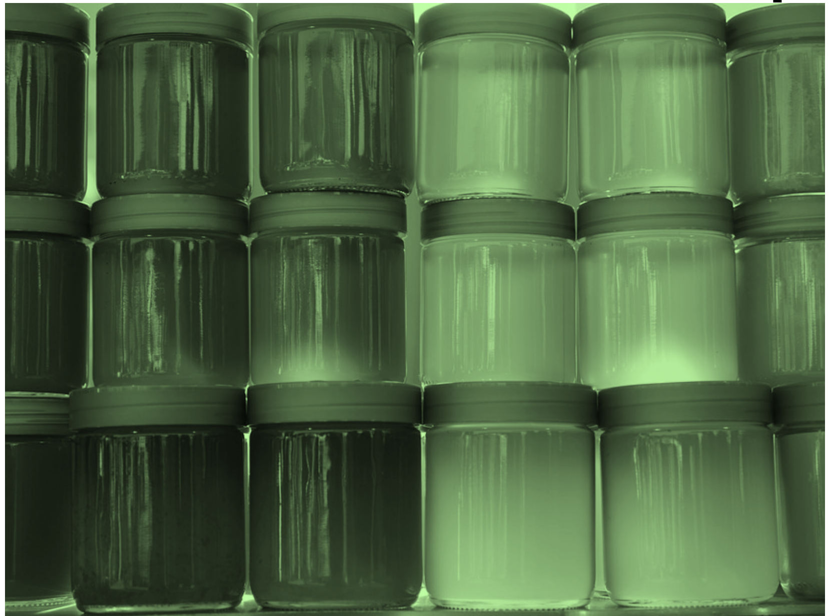




National Green Export Review – Moldova
2nd stakeholder workshop – 17.04.18

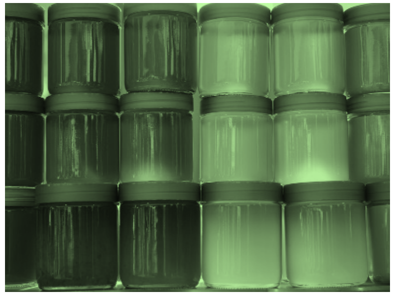
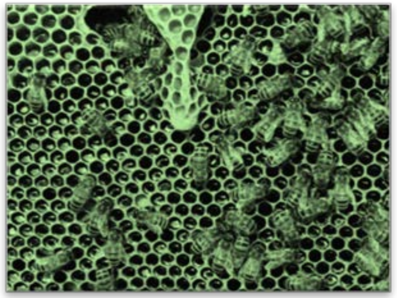
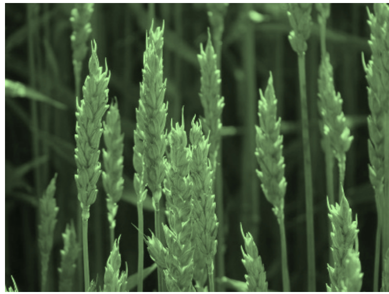



National Green Export Review – Moldova
2nd stakeholder workshop – 17.04.18

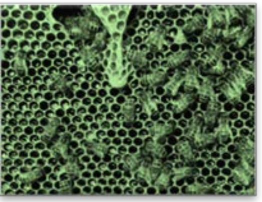
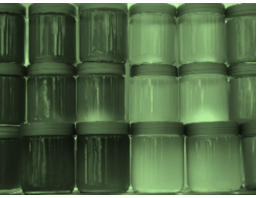


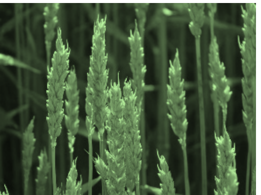
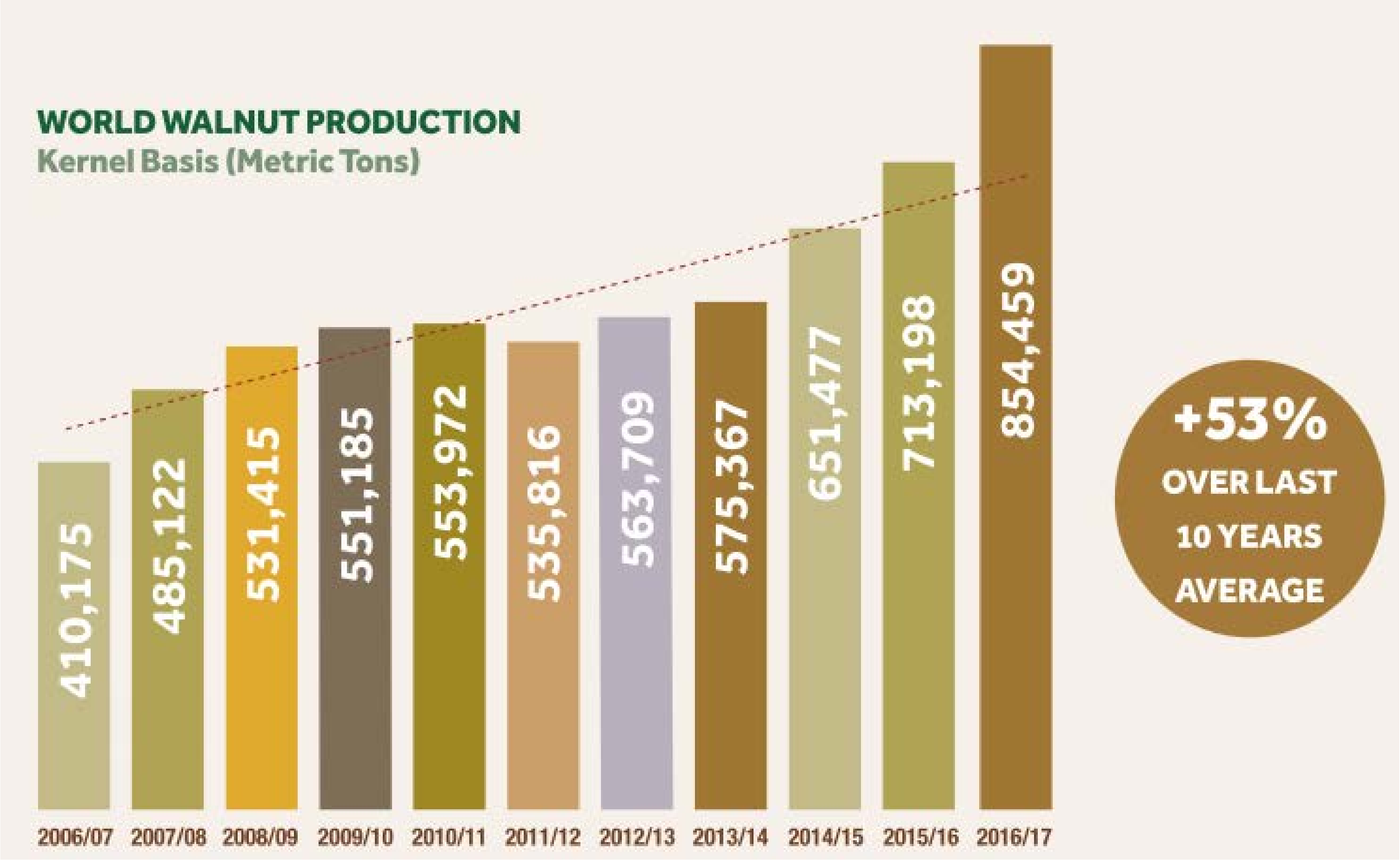
The walnut sector

Walnuts - Global trends

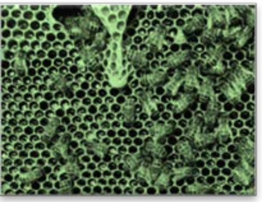
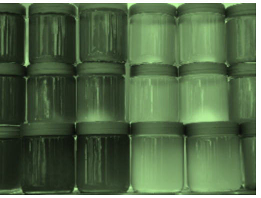


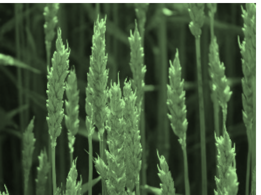



World Walnut Production 2006-2017 (Source: INC 2017)



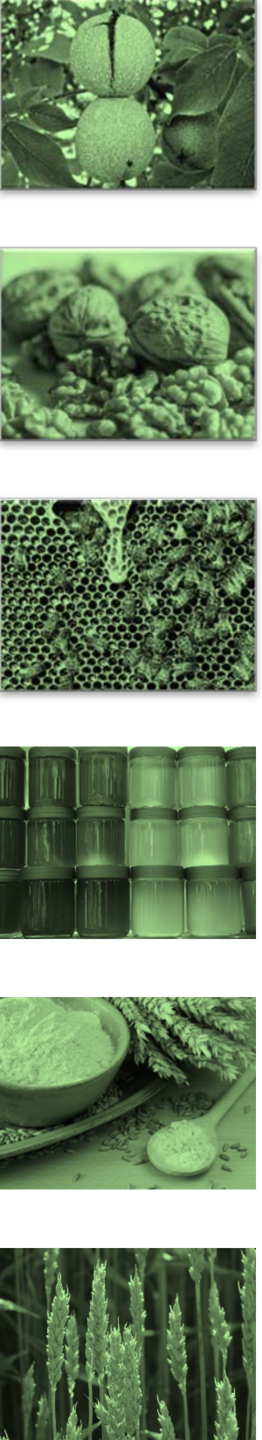


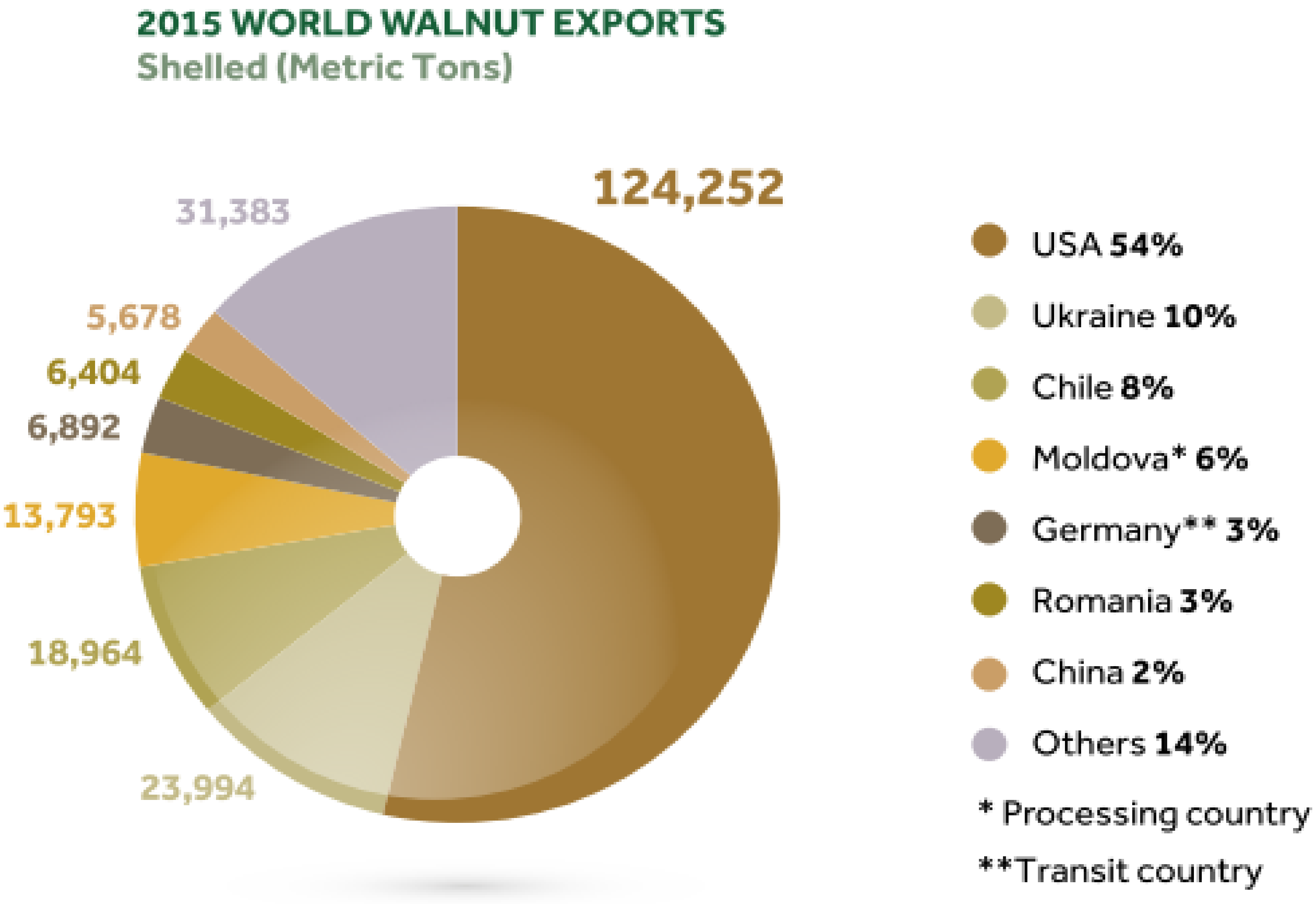
Production of walnuts by countries 2012-2017

Metric Tons, In-shell Basis

	2012/13	2013/14	2014/15	2015/16	Oct 2016/17	Feb 2016/17
Production						
China	720,000	780,000	900,000	1,000,000	1,060,000	1,060,000
United States	450,871	446,335	518,003	547,030	607,814	607,814
European Union	110,000	110,000	107,900	116,000	113,000	113,000
Ukraine	96,940	115,790	102,740	115,080	100,000	110,000
Chile	53,000	60,000	81,634	80,000	100,000	100,000
Turkey	85,000	75,000	40,000	60,000	63,000	63,000
Moldova	22,700	23,100	32,000	30,000	32,000	31,000
Other	44,300	50,700	43,500	43,500	39,000	39,000
Total	1,582,811	1,660,925	1,825,777	1,991,610	2,114,814	2,123,814

Production of walnuts by countries 2012-2017 (Source. USDA 2017)





World Walnut Production 2006-2017 (Source: INC 2017)

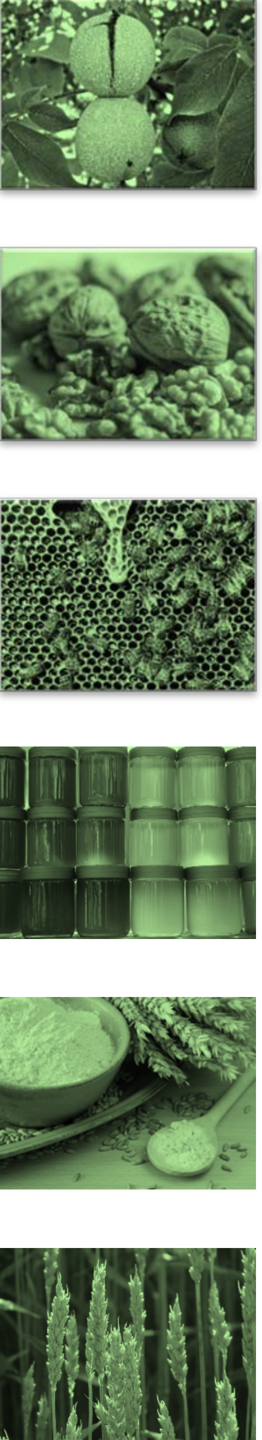
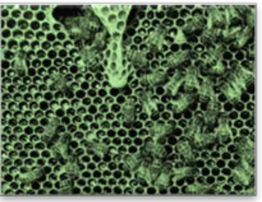
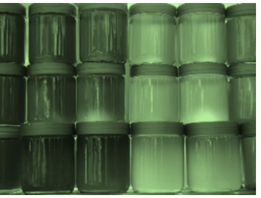
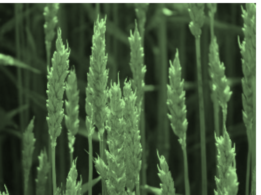


Figure 6 - Top 12 world importers of walnuts in 2016 - cumulatively in-shell and shelled. (Source: own representation based on UN Comtrade Database, 2017)





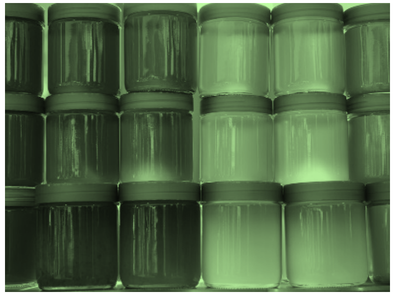
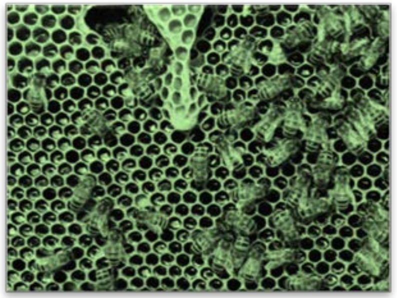
EU-28 Imports of Walnuts by Origin im MT

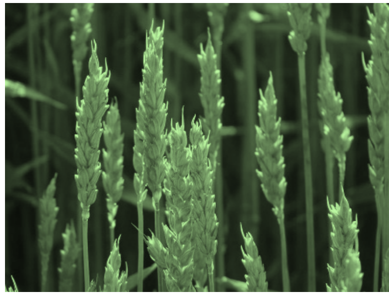
Country of origin	**2012/13**	**2013/14**	**2014/15**	
United States	72,552	84,839	97,651	
Moldova	21,262	23,280	24,452	**→ 14% of EU import**
Chile	16,464	21,710	24,041	
Ukraine	18,041	19,855	22,206	
China	3,617	5,014	3,404	
Others	10,138	11,126	10,267	
Total	133,350	156,408	175,317	

EU-28 Imports of Walnuts by Origin im MT - Inshell Basis (Source USDA Tree Nuts Annual 2016)

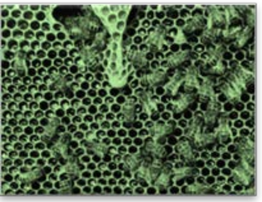
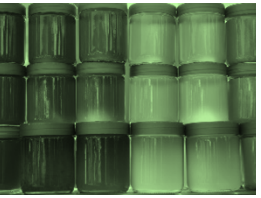
Walnuts – Moldova – key facts

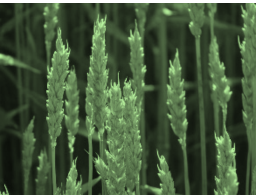






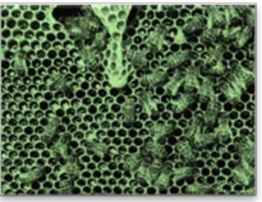
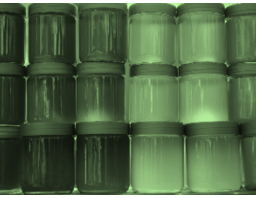



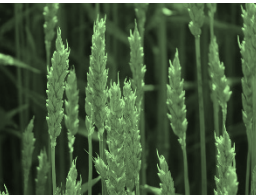


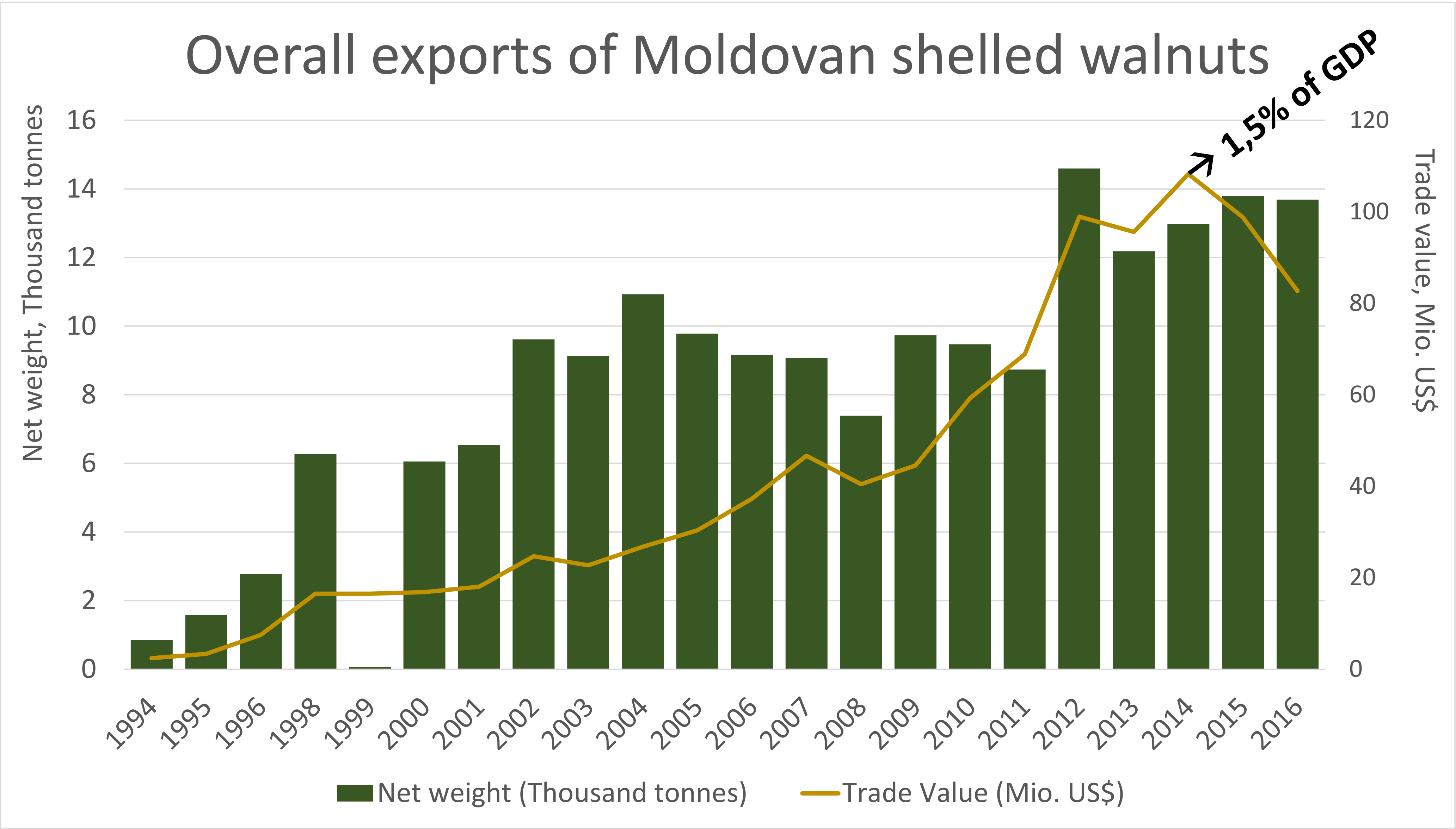
Walnuts – Moldova – key facts

- We’re in those lucky 7% of the world territory best for Juglans regia
- Walnut – a ubiquitous and traditional culture in Moldova
- Road plantations: ca. 100.000 ha – 60% of national production
- Orchards: ca 24.000 ha (16.000 ha – yiedling in 2017)



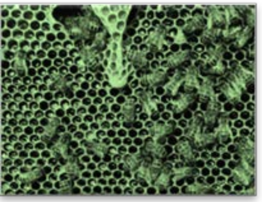
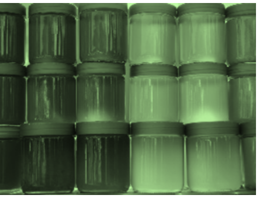



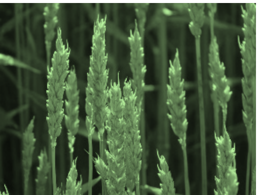


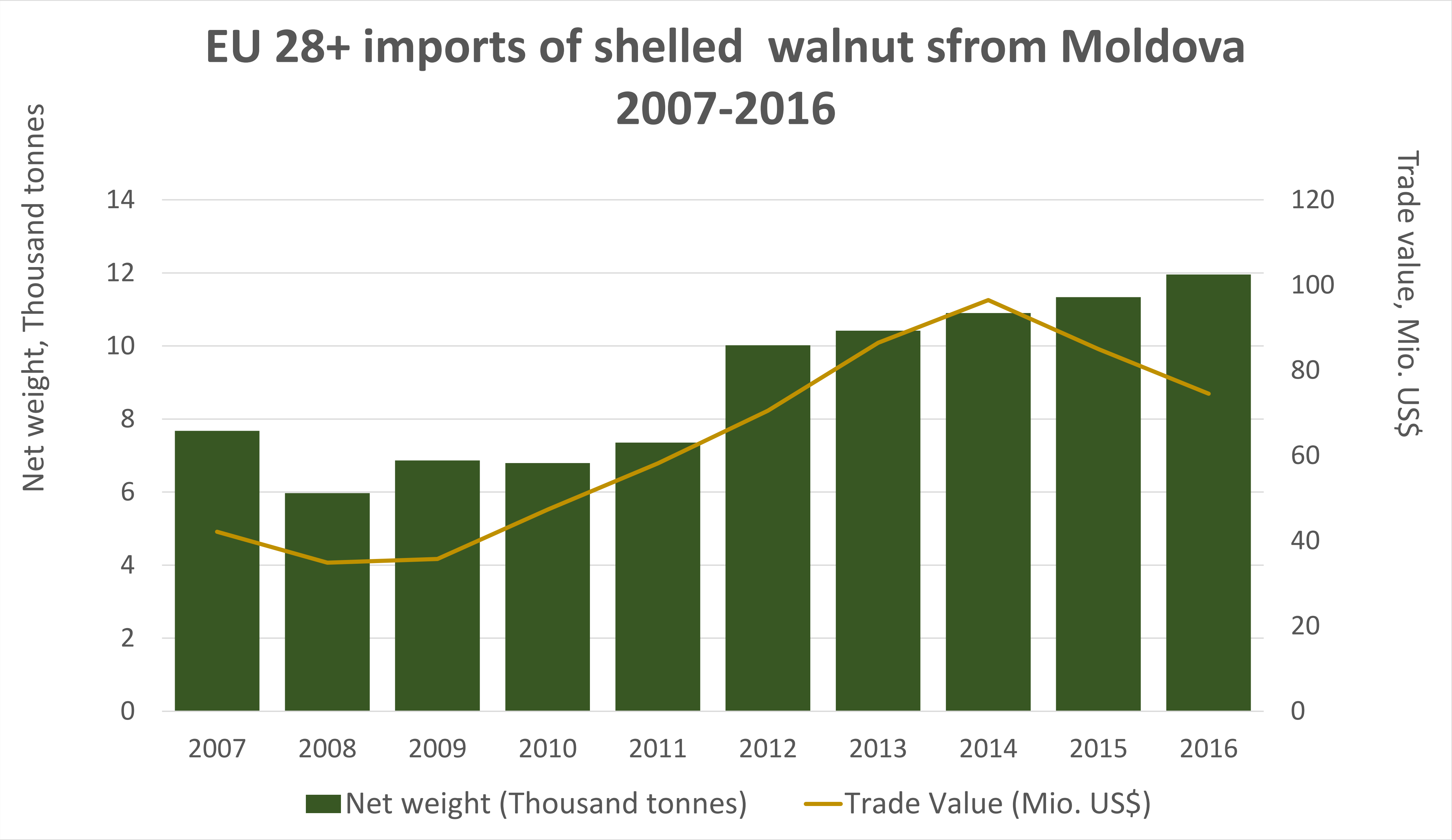


Overall exports of Moldovan shelled walnuts (1994-2016), (Source: Own representation based on UN Comtrade Database, 2017)

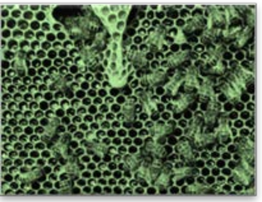


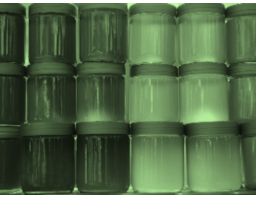



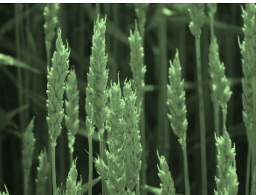


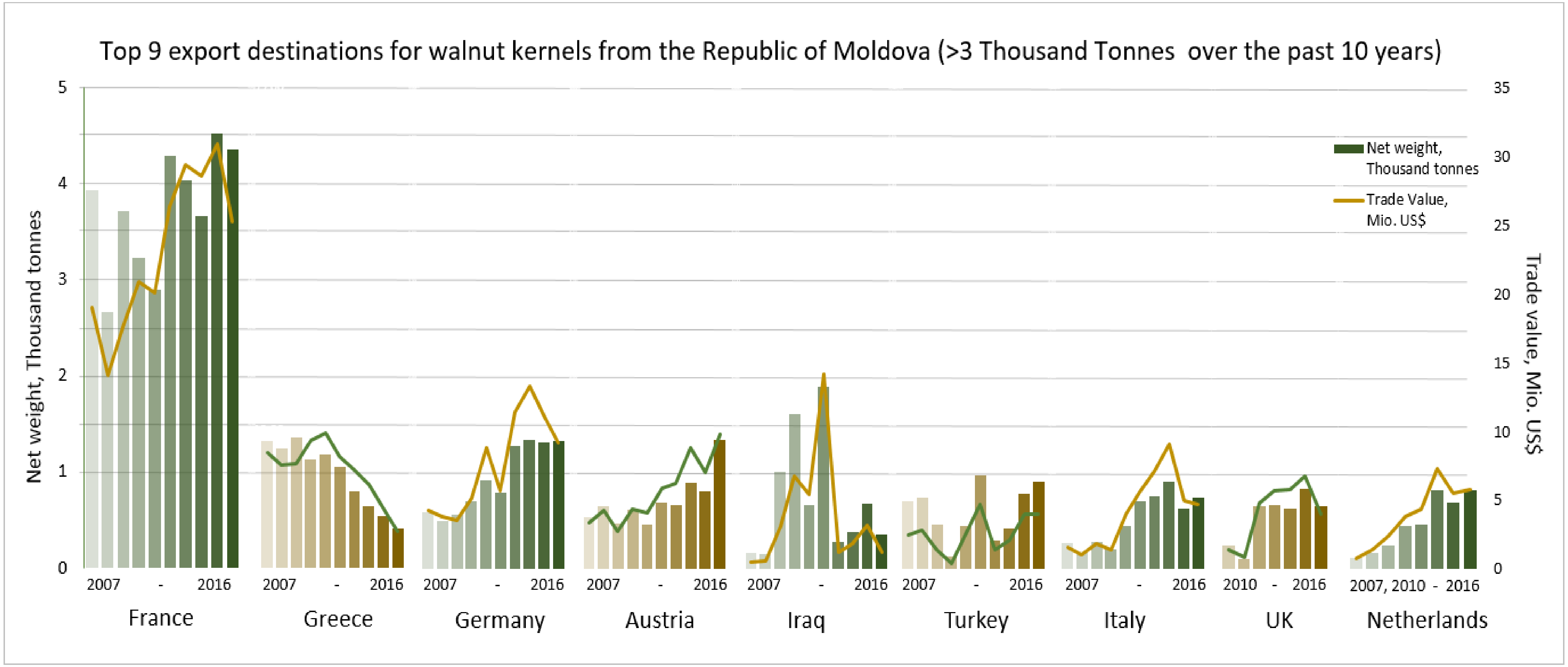


(Source: Own representation based on UN Comtrade Database, 2017)



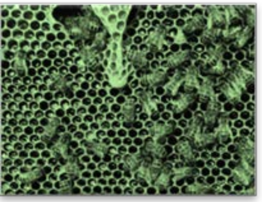
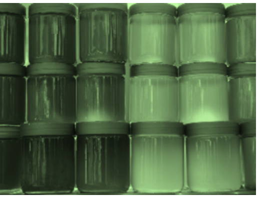


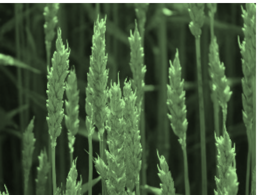




Top 9 export destinations for walnut kernels from the Republic of Moldova (Source: own representation based on UN Comtrade 2017 data)



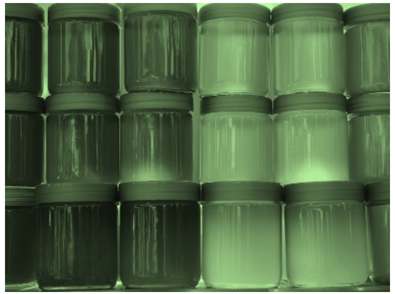
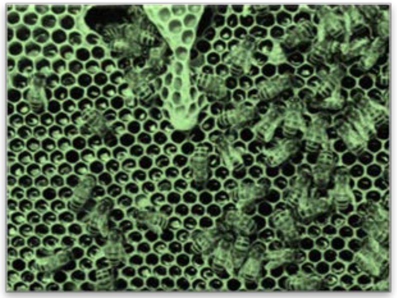


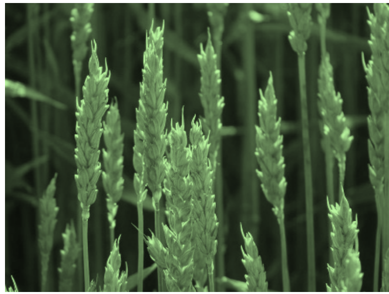
Adding value and divesification

- Organic walnut consumption is growing.
  - Selling price conventional: 1,50 to 2,00 EUR per 100 g,
  - Selling price organic and premium segment: up to 3-4 EUR per 100 g → 30-50% more value addition according to CBI
- Added-value products (walnt oil, flower, trail mix, etc.)
- Market niche diversification:
  - Middle-East ethnic minorities in the EU
  - Small, natural, artisanal market channels and consumer cooperatives
- Geographic diversification: more EU targeting, Middle East, Asia Pacific

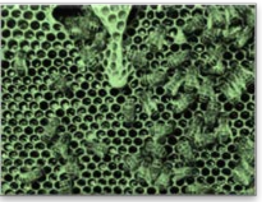
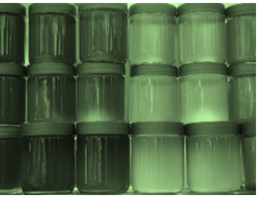
SWOT Analysis for the Walnut Sector

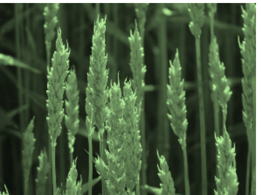






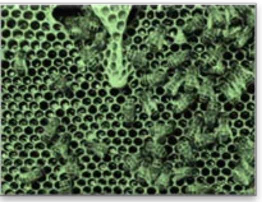
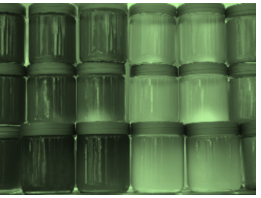



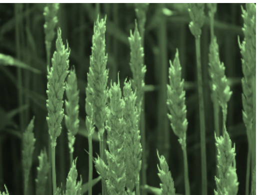


Walnut sector - strengths

- Favorable climate and fertile soils
- Abundance of established trees and scientifically selected varieties suited to local conditions
- Suited to intercropping due to large spaces between the trees
- Walnut planted by majority of rural households – long tradition of knowledge in horticulture
- Orchard management low maintenance costs
- Agricultural subsidies for walnut orchards
- Well-developed processing (kernel extraction industry)
- Nearness to EU, world’s biggest importer of walnut kernels
- Benefits from FTAs with many importing countries
- Existing contracts for non-organic produce with foreign distributors
- Existance of the National Walnut Growers Association, and a recently established National Organic Value Chain Association
- Existence of organically certified producers
- Growing walnut consumption due to proven health benefits



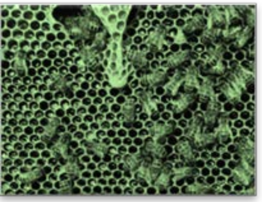
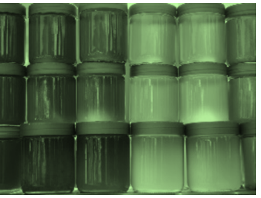



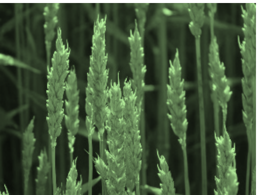


Walnut sector - weaknesses

- Limited value-added production, reliance on raw commodities exports to foreign markets for processing
- Insufficient infrastructure for storage for smallholders and small intermediaries
- Lack of finance availability for smallholders (or Limited availability of micro-financing for small farmers)
- Rural youth leaving farms and farming for cities and abroad
- Low performance of the peripheral service sectors (packaging, consulting)
- Non-existence of Moldovan walnut brands and little recognition for the origin.
- Occasional poor quality of walnuts, especially those harvested along the roads too early
- Lack of understanding of technological necessities of walnut plantations
- Lack of post-harvest processing management (at least washing and drying)



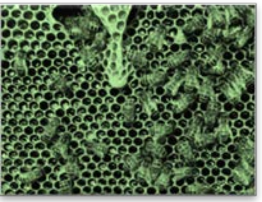
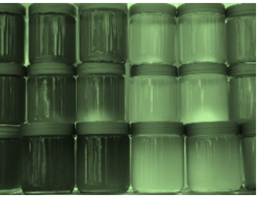



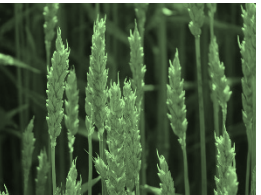


Walnut sector - opportunities

- By creating jobs, development of the organic agriculture sector could significantly reduce rural unemployment
- Training program for farmers can bring new farms into organic production
- Higher margins can attract youth to entrepreneurship opportunities in the sector
- A national organic label can enhance visibility and demand for organic produce
- Target higher value buyers with more value and convenient products
- Improve linkages to tourism sector to tap local market for artisanal walnut products
- Improve quality and food safety to meet growing world quality standards
- Add value across entire value chain
- Harvest senile trees for furniture production
- Expand the organic certification

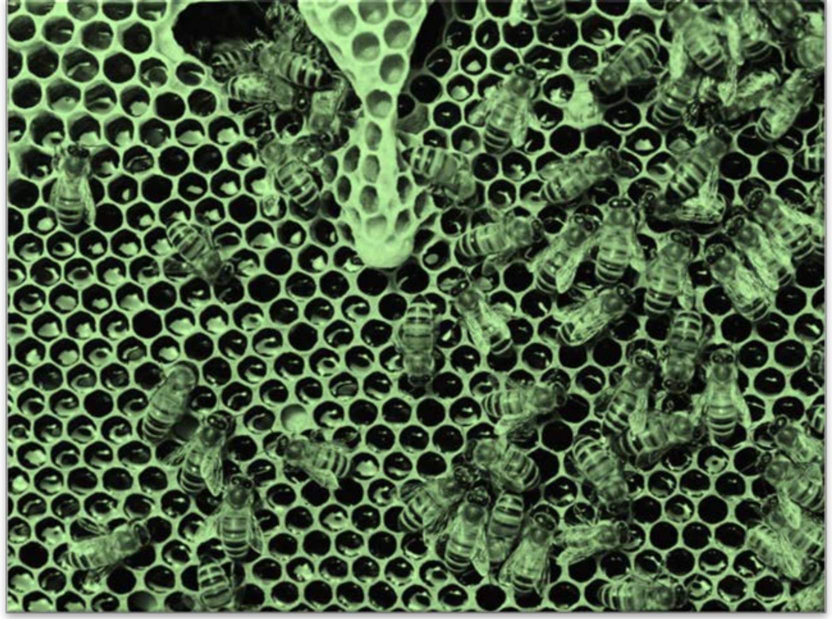
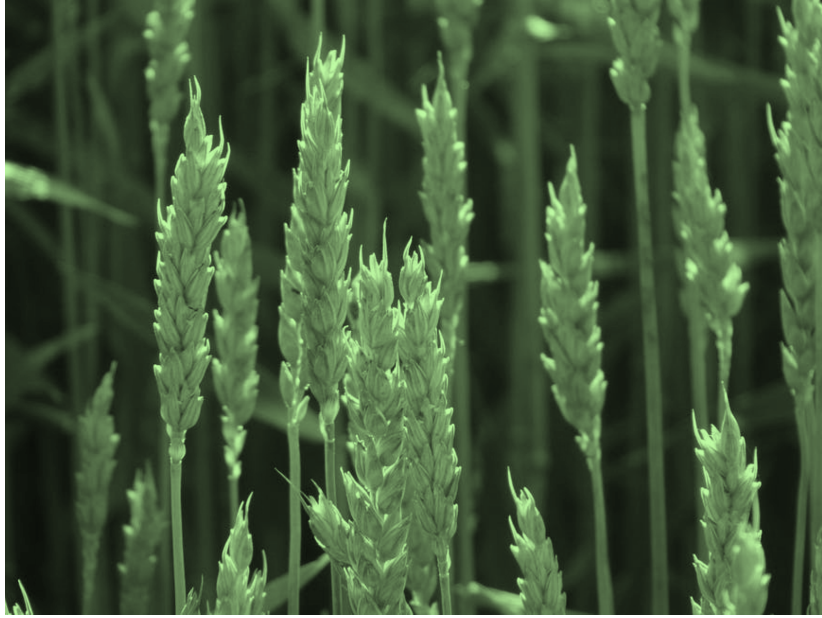


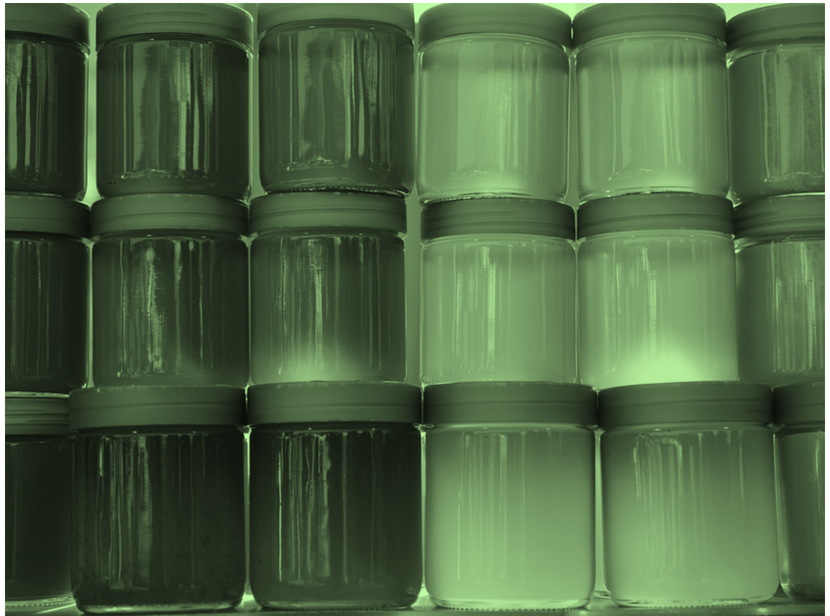


Walnut sector - risks

- Climate change consequences with less predictable frosts and drought periods
- Poor tree management promoting pests and disease
- Uncontrolled and too early harvesting of walnuts growing along the roads.
- Change in government policy
- Increasing supply worldwide
- Further price fall
- Rising quality standards of markets and competing countries

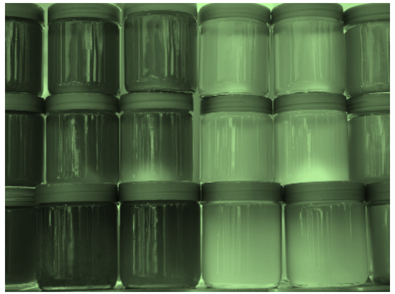
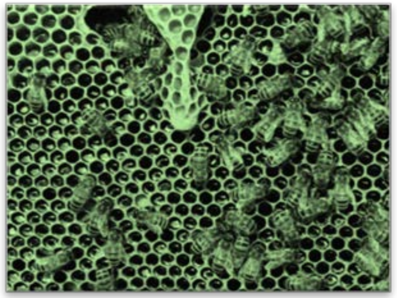




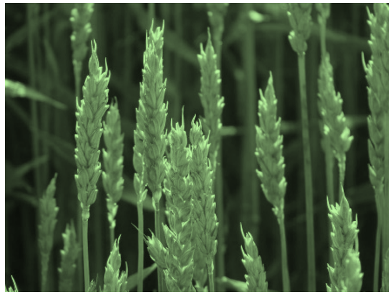
Thank you for attention! – valeria@ecovisio.org

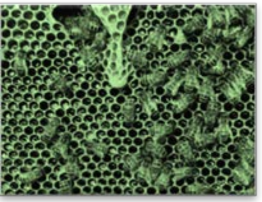
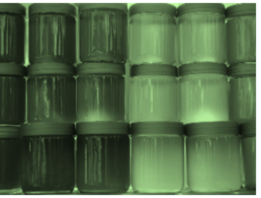

National Action Plan for the Honey sector

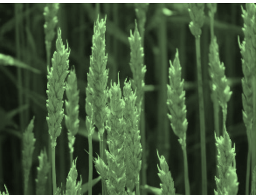








National Action Plan – Walnut Sector

- Creation of a strong National Walnut brand (incl. organic edition)
- Support in creation of effective small producers cooperatives in order to ensure scale effects and quality management
- Capacity Development and Institutional strengthening of the main National Association of Walnut Growers
- Large-scale Trainings on Good Agricultural Practices, Organic Walnut Production and Post-harvest management
- Instituting a minimum export tax of 0,2% for sector development
- Support in Market research and creation of effective trade partnerships for the added-value products (e.g. Walnut Oil)