

# Beyond Potential

The Realities and Future of Iran's Pistachio Industry

# PISTACHIO



**Title: Beyond Potential:** The Realities and Future of Iran's Pistachio Industry

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**Executive Summary:** This report provides a comprehensive overview of Iran's pistachio industry within the broader context of the nation's agricultural sector. It begins by examining the current state of Iranian agriculture, highlighting its strengths and key areas. The focus then shifts to pistachios, a cornerstone of Iranian agricultural exports. The report explores the various types of pistachios cultivated in Iran, analyzes current production levels, and examines Iran's position as a major player in the global pistachio market. Finally, the report identifies and profiles some of the most successful Iranian companies operating within the pistachio industry, showcasing their contributions to the sector's growth and international recognition.

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## Introduction

Standing at the crossroads of East and West, Iran boasts a rich history, diverse resources, and a strategic geographical location that holds immense potential for its global trade landscape. This report delves into the heart of this potential, exploring the strengths and capabilities that position Iran as a valuable player in the international market. From its vast reserves of natural resources to its vibrant industrial sector, we unveil the factors that contribute to Iran's competitive edge. We will meticulously analyze specific export sectors with high growth potential, highlighting the opportunities that await both domestic and international actors. This report serves as a valuable resource for businesses, policymakers, and investors seeking to explore the untapped potential of the Iranian market. As we delve deeper, you will gain a comprehensive understanding of the factors shaping the future of trade and export in this dynamic nation.

The food industry in Iran plays a significant role in the country's economy, contributing to both domestic consumption and export markets. The sector encompasses a wide range of products, including dairy, nuts, fruits and vegetables, grains, and processed foods. With a rich agricultural heritage and diverse climate zones, Iran has the potential to produce a wide variety of food products to meet the needs of its population. Despite facing challenges such as water scarcity and international sanctions, the food industry in Iran has shown resilience and growth in recent years. The government has implemented policies to support domestic production and reduce reliance on imports, leading to increased investment in food processing facilities and infrastructure. Additionally, Iran's strategic location between Europe and Asia provides opportunities for trade partnerships and export markets for its food products. By providing a comprehensive overview of Iran's agriculture and food industry, this report aims to offer valuable insights into its current status and future potential.

This report was prepared with the support of the promotion organization of Iran (TPO). TPO stands as a pivotal force in fostering trade between Iran and other nations. Established in 1966, it carries the crucial mission of promoting and developing Iran's non-oil trade through a comprehensive set of initiatives. The TPO role extends far beyond simply being a mediator. It actively engages in various endeavors to cultivate a thriving trade environment. Iran Expo Exhibition is one of the TPO plan to facilitate trading with Iran. Iran Expo is a global platform dedicated to showcasing the achievements and exceptional products of Iran, held in Tehran, serves as a bridge, connecting the world with the rich heritage and dynamic industries of this captivating nation.



# Structure of the Report

## Topics

<b>Report Specifications</b>	<b>Mission Statement</b>
	<b>Purpose of the Report</b>
	<b>Scope of the Report</b>
	<b>Research Methodology</b>
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<b>An Overview of Iran</b>	<b>Iran at a Glance</b>
	<b>GDP</b>
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	<b>Iran's Exports</b>
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<b>Iranian Pistachio</b>	<b>Scientific and Technological Opportunities</b>
	<b>Challenges and Risks</b>
	<b>Types of Iranian Pistachio</b>
	<b>Pistachio Production in Iran</b>
<b>International Regulatory Frameworks</b>	<b>Iran's Pistachio Export</b>
	<b>The Future of Pistachio in the Global Market</b>
<b>Iranian Prominent Companies in Pistachio Industry</b>	<b>SWOT Analysis</b>





## Report Specifications

### Mission of the Report

Empowering Iran's Agriculture and Food industry for Global Excellence is the main mission of this report. This mission is driven by a commitment to:

- Access to critical market insights
- Direct Access to Potential Partners
- Establish Valuable and Strategic Connections
- Minimize trade Risks

### Purpose of the Report

The primary purpose of this report is to serve as a comprehensive resource for foreign businesses and investors interested in exploring export opportunities in Iran's Agriculture and Food industry. It aims to provide a holistic understanding of the sector current status, strengths, opportunities, challenges, and future prospects.

### Scope of the Report

The report encompasses a broad scope, covering various aspects of the Iranian Agriculture and Food industry export potential. It delves into the following key areas:

- Key Export Products
- The most attractive Target Markets
- Trade Promotion and Investment Opportunities
- Industry Challenges

### Research Methodology

This report analyzes the export potential of

Iran's Agriculture and Food industry for international traders. It employs a three-step approach:

### Macroeconomic Analysis

Secondary Data Collection: Data on Iran's GDP, trade volume, and major trading partners was gathered from reputable sources such as the World Bank, International Monetary Fund, and International Trade Center (ITC). This data was analyzed to draw a big picture of the overall economic landscape, highlighting market size, growth potential, and relevant consumer trends.

### Industry-Specific Research

Information on Iran's Agriculture and Food industry exports, key product categories, and major competitors was collected from specialized databases like Trade Map, FAOSTAT, and COMTRADE. Based on this data, specific Agriculture and Food industry segments with high export potential were identified for further study.

### Primary Data Collection & Company Profiling

Company Interviews: Semi-structured interviews were conducted with representatives of prominent Iranian Agriculture and Food industry export companies within the chosen segments. Company Profiles were created for key players, highlighting their strengths, target markets, and export capabilities.

### Limitations

It is important to acknowledge that this study has limitations. Access to certain primary data, particularly within specific industry segments, might be restricted due to market competitiveness or data availability. Additionally, the dynamic nature of the global economy and trade regulations necessitates continuous updates to maintain the report accuracy.

### Target Audience

The report is primarily tailored to foreign businessmen and investors seeking opportunities to collaborate or invest in Iran's Agriculture and Food industry. It aims to cater to a diverse range of stakeholders, including:

- Agriculture and Food industry producers and processors
- Agriculture and Food industry technology companies
- Investment firms and financial institutions
- Consulting firms and advisors



# Overview of Iran

## Iran at a Glance

Area: 1,648,195 square kilometers  
Population: 88,860,005 people  
Capital: Tehran  
Official religion: Islam  
Official language: Farsi (Persian)  
Currency: Rial  
Number of provinces: 31  
Number of industrial parks: 824  
Number of science & technology parks: 54  
Number of technology incubators: 264  
Number of high-tech companies: 9620  
Number of industrial companies: 30400  
Number of universities: 2183  
Number of ports: 12  
2023 GDP: 368 billion USD  
The export volume in 2023: 81 billion USD  
The import volume in 2023: 59 billion USD

Iran boasts a rich history and a strategic location, fostering a dynamic and diverse economy. This report delves into the nation's flourishing industries, showcasing its vast potential for international collaboration and growth. With a skilled workforce and a strong entrepreneurial spirit, Iran is poised to play a significant role in the global marketplace. Iran's economy is underpinned by a robust mix of industries. This report explores the strengths of each sector, highlighting the unique investment opportunities they offer. Iran possesses a strategic location and well-developed infrastructure, making it a key player in international trade. This report examines the country's trade landscape, showcasing the opportunities for foreign businesses to partner with Iranian companies and reach new markets.

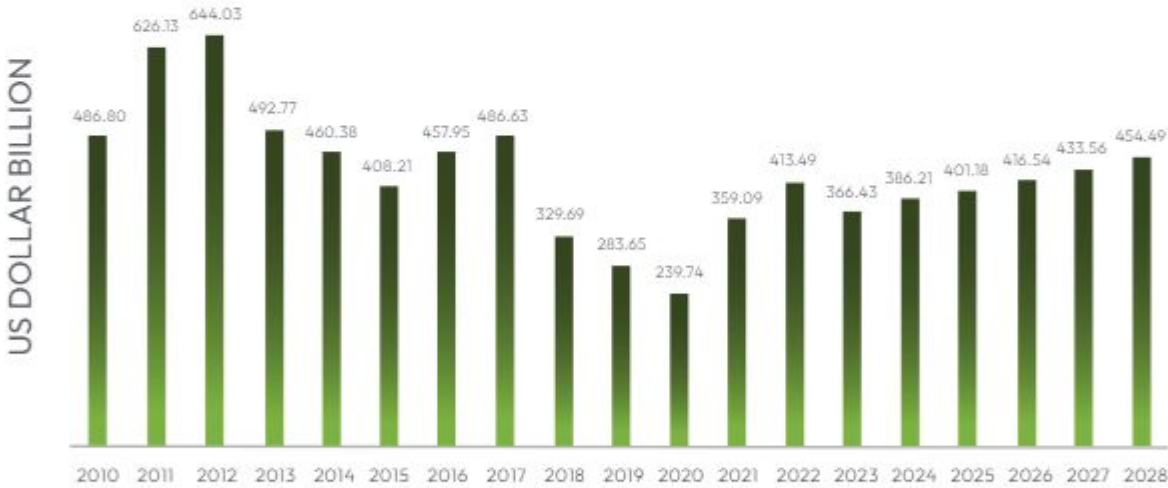
Iran possesses a diverse and dynamic economy exhibiting both strengths and challenges that influence its overall economic performance and the prospects for its Agriculture and Food industry exports. This section will provide a comprehensive overview of Iran's economic indicators, including GDP, exchange rates and trade volumes. By exploring these key areas, this report provides a comprehensive overview of Iran's dynamic economy, emphasizing its potential for future growth and collaboration. It serves as a valuable guide for businesses seeking to navigate the exciting opportunities the Iranian market presents.

# GDP

The Exhibit 1 shows the GDP (current USD) of Iran from 2010 to 2028, with projections for 2023 to 2028. The GDP is a measure of the total value of goods and services produced within a country in a given period. The graph shows that the GDP of Iran has been growing steadily in recent years, with an average annual growth rate of around 2%. In 2022, the GDP of Iran was

estimated to be around 414 billion USD. According to the graph, the forecast for Iran's GDP growth between 2023 and 2028 is for modest growth, in the range of 2% to 3% per year. This means that the Iranian economy is expected to grow slowly but steadily over the next few years.

Exhibit- 1- GDP (USD) of Iran from 2010 to 2028 (Source: World Bank)





## Exchange Rate

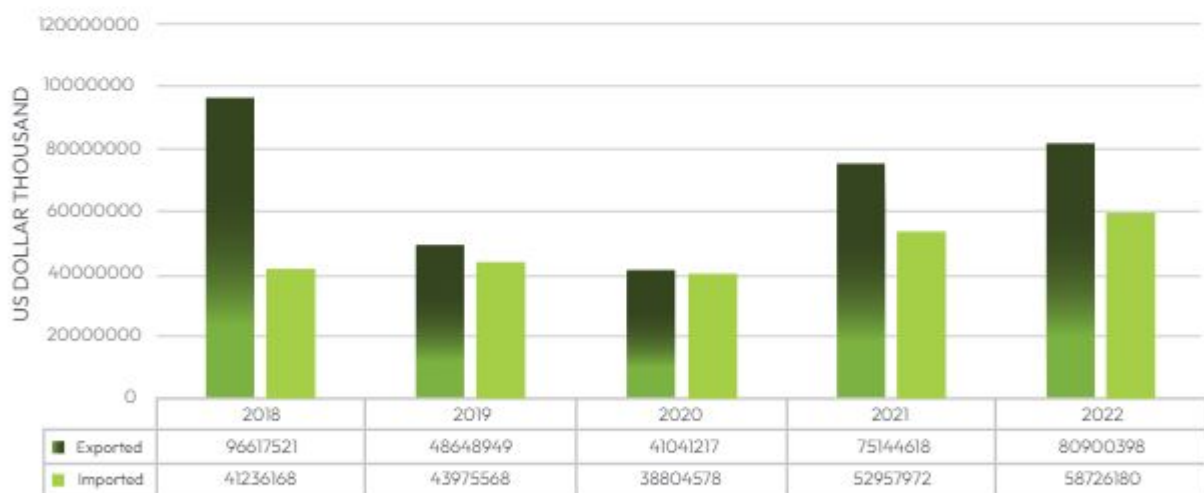
The Iranian Rial has weakened against the US dollar in recent years. This weaker exchange rate, meaning more rials are needed per dollar, can make Iranian exports cheaper on the global market. This could potentially lead to increased demand and production due to lower labor costs (in dollar terms) and a decrease in the unit cost of goods.

## Trade Statistics

Iran's overall import statistics have experienced an approximate growth of 40% during the last four years. Iran's largest imports in 2022 are from the United Arab Emirates (UAE) accounting for 30.7%, followed by China at 26.5%, Turkey at 10.4%, and India at 4.6%.

Iran's overall export statistics are also going through an upward trend, especially in the last two years. Exports from 2020 to 2022 have grown by 100 percent. Iran's largest export in 2022 is to China with 27.7%. The reason for the drop in exports in 2019 is the withdrawal of the United States from the JCPOA signed by Donald Trump, the former president of this country, and the return of sanctions in 2018, which resulted in a significant drop in Iran's oil exports. This trend reached its lowest level in 2020 regarding the impact of the Corona pandemic. After that and under the same conditions, Iran was able to increase its exports.

Exhibit 2- Value of Iran's Export and Import from 2018 to 2022 (Source: TRADE MAP)





## Agriculture and Food Industry in Iran

Iran boasts a rich agricultural heritage and a vibrant food industry, contributing significantly to its economy and cultural identity. This report delves into the current state of this sector, exploring its market dynamics, trade activities, and the unique position Iran holds.

Iran's diverse climate allows for a vast array of agricultural products. From staple crops like wheat, rice, and barley to an abundance of fruits, nuts, and vegetables like pistachios, saffron, dates, and watermelons, Iran ranks among the top five global producers of many of these items. The agricultural sector plays a crucial role in Iran's economy, contributing significantly to both Gross Domestic Product (GDP) and non-oil exports. The government prioritizes self-sufficiency in food production, making it a stable and reliable supplier.

Roughly 28.5% of the total land area of Iran, or 47 million hectares, is dedicated to cultivated agriculture. This allows Iran to be self-sufficient in many staple crops and a major producer of various fruits and nuts. Additionally, forests cover approximately 6.5% of the country, with

the Caspian region boasting the most commercially valuable woodlands. These forests provide valuable timber and contribute to Iran's overall environmental health.

(Source: World Bank)

 Land area(sq. km) - Iran	1,648,195
 Agricultural land(sq. km) - Iran	470,670
 Forest area(sq. km) - Iran	107,656,3

Despite its achievements, Iran's agriculture and food industry possess significant potential for further growth. Modernization efforts, improved water management practices, and collaboration with international partners can unlock even greater productivity and export capacity. Iran recognizes the importance of international trade and actively seeks partnerships with other players. This report explores the opportunities available for foreign companies to invest in Iran's food processing, packaging, and distribution sectors.

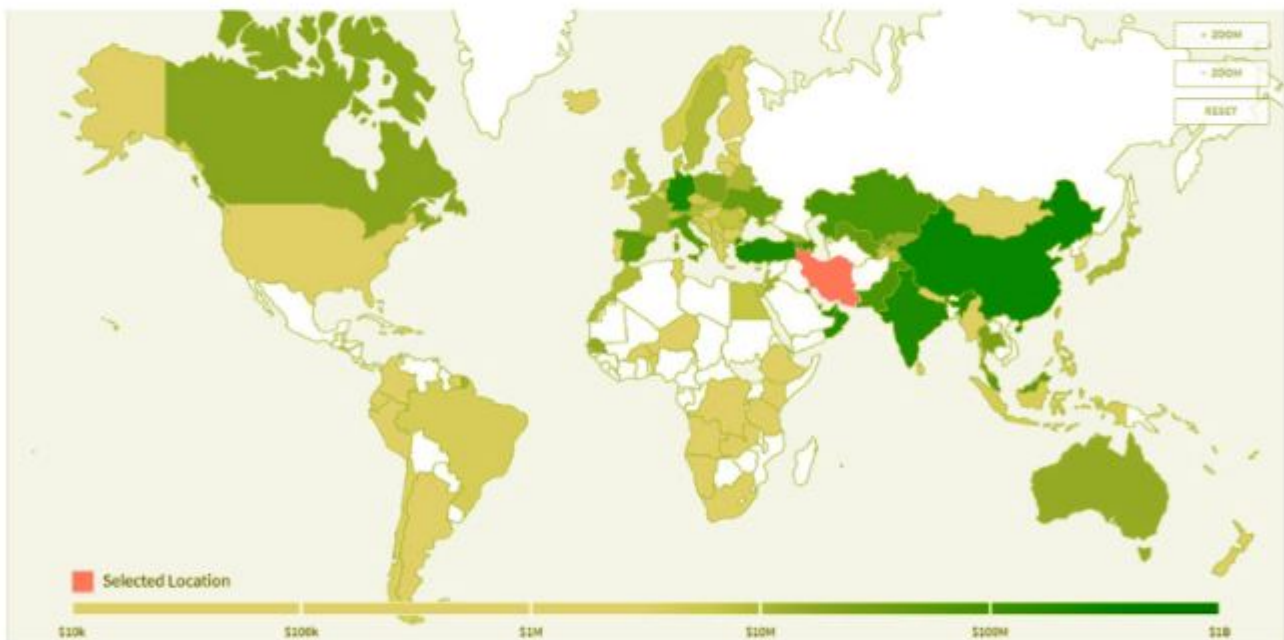


## Iran's Agricultural Trade

Iran exported a total of 2.888 billion USD worth of agricultural goods in 2021. Iran's top export partners for agricultural goods in this year were:

China (477 million USD)  
United Arab Emirates (266 million USD)  
Germany (243 million USD)  
Turkey (225 million USD)  
India (223 million USD)

Exhibit 3- Destination of Iran's Exports of Agricultural Goods in 2021  
(Source: Atlas Harvard)



## Agricultural Production and Trade of Iran (Source: Atlas Harvard, FAO)

Selected Indicators		2010	2015	2021
Share of Agriculture, Forestry and Fishing Value Added In Total GDP (USD 2015 prices) (PERCENT)		8.1	10.1	11.0
AGRICULTURAL LAND (CROPLAND) BY USE (THOUSAND HA)		17 062.4		17 590.0
Top 3 Trade Partners	Export Value	China (16.53%), United Arab Emirates (9.24%), Germany (8.43%)		
	Import Value	Brazil (22.30%), United Arab Emirates (11.15%), India (10.85%)		
Gross Agriculture Production Value (current thousand USD)		33,073,822	45,087,918	122,702,354

The share of agriculture, forestry, and fishing value added to total GDP increased from 8.1% in 2010 to 11.0% in 2021. This indicates that agriculture is becoming an increasingly important sector of the Iranian economy.

Iran's top 3 trade partners for agricultural exports are China, the United Arab Emirates, and Germany.

Iran's gross agricultural production value increased from 33,073,822 thousand USD in 2010 to 45,087,918 thousand USD in 2015 to

122,702,354 thousand USD in 2021. This indicates that Iran's agricultural production is growing rapidly.

According to the research conducted on the major non-oil export products of Iran, the 5 products including saffron, dates, pistachios, caviar, and dried grapes are among the high-quality products with export potential, which are also very important at the global level.

## Global Rank of Iran in Export of the Agricultural Products

Product	Global Rank of Iran in Export		
	2020	2021	2022
Fresh or Dried Dates	1st	3rd	3st
Saffron	1st	1st	1st
Fresh or dried pistachios	2nd	2nd	2nd
Caviar	12th	14th	14th
Dried Grapes	2nd	3rd	3rd

(Source: Trade Map)

- Iran has a strong position in the global market for dried fruits, particularly dates. In 2022, Iran was the world's third-largest exporter of dates.

- Iran is also a leading exporter of saffron,

holding the top spot in global exports for the past three years.

- Iran's pistachio exports have been consistently ranked among the top two globally for the past three years.





According to the data published by the International Trade Center (ITC) in the field of caviar exports:

- Iran has experienced an upward growth in caviar exports since 2019, which is more than 25% in 2021-2022. In the same year, however, the big exporters of caviar such as Germany, Netherlands, and Spain experienced a downward trend.
- The unit value of Iranian caviar is about 4 times the average global unit value, which indicates the high quality and grade of Iranian caviar in the world.

### Scientific and Technological Potential and Opportunities

- More than 50 publications from two of the country's most authoritative scientific quarterly journals are dedicated to publishing new research in the field of agriculture and the food industry.
- A total of 113 universities are active in the field of the food industry. They offer programs in fields like Food Science and Industry, Food Industry Science and Engineering, and Food Industry Machinery Engineering, equipping graduates with the knowledge and skills to drive innovation and growth in this vital sector.
- During the last three years, 5 Iranian researchers with h-index rank higher than 57 were in the food industry.
- By 2023, Iran had a remarkable 9,620 knowledge-based companies, a 17% increase from the previous year. Among them, around 400 companies specifically focus on biotechnology, agriculture, and the food industry, fostering innovation and propelling the sector forward.

### Challenges and Risks

While Iran's food industry holds immense promise for export growth, it's crucial to acknowledge the challenges and risks that can potentially hinder its progress. Understanding these issues is essential for foreign investors and businesses seeking to enter the Iranian agriculture and food market.

#### Impact of Sanctions

International sanctions have undoubtedly restricted Iran's access to global markets, limiting the presence of Iranian products on the world stage.

#### Climate Change

Like many countries, Iran faces the challenges of climate change, which can affect the production levels of some agricultural products. Mitigating these effects will be crucial for long-term food security and export potential.

#### Raw Material Focus

Currently, a significant portion of Iran's agricultural exports consist of raw or semi-raw materials. While these exports hold value, there's an opportunity to increase the export of higher value-added processed food products.

By acknowledging these challenges and working towards solutions, Iran can further unlock the vast potential of its food industry and become a major player in the global food market.





## Iranian Pistachio

Iranian pistachios are a globally recognized symbol of quality and taste. Renowned for their vibrant green shells and rich, nutty flavor, they have earned the moniker "emerald gem." This report provides a comprehensive analysis of the Iranian pistachio industry, exploring its unique characteristics, robust domestic production, and prominent position in the international market.

This analysis will delve into the diverse varieties

of Iranian pistachios, each offering distinct flavor profiles and characteristics prized by consumers worldwide. We will examine the current state of the industry including production levels. Finally, the report will provide a detailed examination of Iran's position in the global pistachio market. We will analyze export trends, identify key trading partners, and explore the factors that solidify Iran's position as a leading supplier of this highly sought-after nut.



## Types of Iranian Pistachio

Iran boasts a rich diversity of pistachio varieties, with dozens developed by farmers through small-scale experimentation. These efforts have led to the selection of superior varieties offering specific advantages. Over time, some of these varieties have achieved stability and widespread adoption, becoming the foundation of Iran's commercial pistachio production. Commercially cultivated Iranian pistachios fall into two primary categories based on their shape: round and long. Pistachios are classified as "long" when their length-to-diameter ratio exceeds 1.5, while those with a ratio below 1.5 are considered "round." Currently, four main commercial varieties dominate Iranian production, each possessing unique characteristics and properties that are explored in detail below.

**Fandoghi:** Fandoghi reigns supreme among Iran's round pistachio cultivars. Extensively cultivated in traditional pistachio-growing regions, it currently makes up roughly 50% of the country's total pistachio production. Despite its dominance, Fandoghi cultivation faces a challenge: its yield is lower compared to other varieties. This factor discourages widespread planting in new orchards.



**Kalleh Ghouchi (Jumbo):** Once a commercially dominant variety, Jumbo pistachios are prized for their large size and excellent kernel quality. However, their production is highly susceptible to water scarcity, salinity fluctuations, and climatic variations.



**Akbari:** As for the long cultivars, Akbari is a long variety with increasing acreage and higher yields with a large nut size. This is the variety with the largest kernel to in-shell weight ratio and thus an exceptional value for money.



**Ahmad Aghae:** is an increasingly popular commercial long variety. Resembling the Kerman variety from the US, its production is growing as it has become very popular in export markets like India due to its exceptional taste and appearance.





Iranian pistachios have a world-famous taste that is unrivaled. The following list details the five major attributes of Iranian pistachios:

**Higher Kernel to In-Shell Ratio:** The most significant of these attributes from the consumers' perspective is a high edible portion that offers the best value for money in the pistachio market. On average, Iranian pistachios have a ten percent advantage on the edible part of the in-shell nut, when compared to pistachios from other origins.

**Variety:** Another significant attribute of Iranian pistachios that makes them adjustable to different markets is that they come in many different varieties and sizes: from 18/20 nut counts per ounce, to 36/38. Each variety has its own differing properties and flavors.

**Taste:** The many pistachio nut varieties of Iranian origin have an unrivaled taste-profile resulting from their higher oil content. All four commercial varieties of Iranian pistachios each have a rich, unique and distinctive flavor.

**Roastability:** Due to their higher unsaturated oil content, Iranian pistachios have the capacity to be roasted at between 160 to 180°C (hot air stream temperature).

**Tradability:** The large number of producers, buyers, exporters, and importers of Iranian pistachios makes for conditions of perfect competition in the market. As a result, fairer trading opportunities present themselves to those engaged in buying and selling Iranian pistachios.





## Pistachio Production in Iran

Traditionally, Iran's pistachio production centered around five key provinces: Kerman, Razavi Khorasan, South Khorasan, Yazd, and

Semnan. These regions boast fertile soil, hot and dry summers, and moderately cold winters – the perfect recipe for growing pistachios.

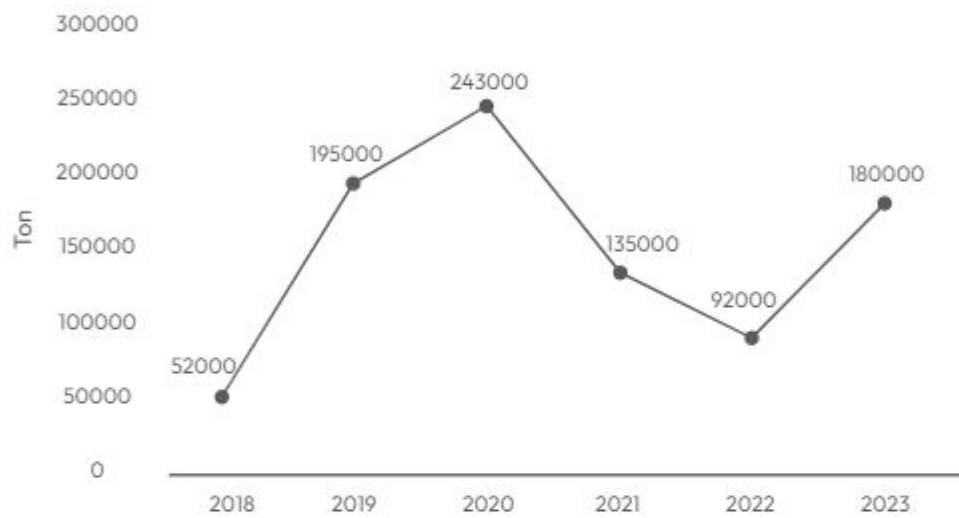
Exhibit 4: Provinces Producing Pistachios in Iran



However, production in these provinces has declined over the past decade due to persistent drought and dwindling water resources. World Bank data indicates Iran's annual rainfall has dipped below 150 mm since 2021. Despite these challenges, Iran's overall pistachio production is unlikely to plummet. Farmers in other provinces with higher average

rainfall and more favorable climates have begun cultivating pistachios. This diversification is expected to boost and then stabilize Iran's pistachio production at around 200,000 MT within the next five years. The Iran Pistachio Association's post-harvest estimate for the 2023 crop suggests a yield of 180,000 MT of dried in-shell pistachios.

Exhibit 5: Annual Pistachio Production in Iran



In recent years, Iran has prioritized the development of pistachio-specific technologies. This technological surge has significantly impacted both the quantity and quality of pistachio yields across the industry.

Iran, a longstanding leader in pistachio production and export, is prioritizing the development of pistachio-specific technologies to address historical shortcomings and further strengthen its position in the global market. These advancements aim to achieve a two-fold benefit: enhancing pistachio quality by reducing aflatoxin levels through initiatives like the Green Corridor project and HACCP,

and minimizing environmental threats like biennial bearing, frost damage, and pests through sustainable practices. This technological surge is expected to significantly boost both the quantity and quality of Iran's pistachio yields, solidifying its position as a global leader in the industry.

According to FAO Stat data, by 2022, the US, Iran, and Turkey were the top three pistachio producers globally. With increasing production, the race for the top spot intensifies. Combined, these three countries account for a staggering 90% of global pistachio production, leaving the remaining 10% to Syria, Afghanistan, Spain, and a few other producers.



## Iran's Pistachio Export

Iran has firmly established itself as a major player in the global pistachio market. Over the past few years (2019-2022), it consistently ranked among the top three pistachio exporters by both value and weight, holding the coveted position of the world's second-largest exporter in 2019, 2021, and just behind the United States in 2022.

While global leadership fluctuates slightly year-to-year, Iran's dominance in terms of weight is undeniable. In 2020, they were the undisputed champion, exporting a staggering 181,000 tons of pistachios to a remarkable 77 countries.

Market Size and Major Destinations for Exported Iranian Pistachio Products in 2022

Product Category	Average Annual Export Weight (1000 Tons)	Share from Total Export Weight (%)	Target Markets in order of Imported Volume
Open in-Shell	39	70%	CIS, Indian Subcontinent, Middle East, EU
Natural Kernel	11	20%	Indian Subcontinent, Middle East, EU
Closed Shell	3	5%	Far East, EU
Green Kernel	3	5%	EU, Middle East
Total	56	100%	World

Russia, Iraq, Pakistan, China, and Kazakhstan represent Iran's key pistachio import partners in 2022. Notably, Pakistan boasts an exclusive market with a concentration factor of 0.99, meaning Iran supplies a staggering 99.3% of their pistachio imports - a testament to the strength of their export network. China and Kazakhstan also show similar trends, highlighting Iran's dominance in these markets.

While weight remains an important measure, Germany has emerged as the world's leading pistachio import market in 2022, and Iran is a key player here, ranking as the second-largest exporter to Germany. This highlights Iran's ability to cater to diverse markets beyond sheer volume. Notably, China consistently held the second position for Iranian pistachio imports between 2018 and 2022 (except for 2020 when Iran was the leader importer), demonstrating the strength of this trade relationship. Additionally, Iran holds the top exporter position for Russia, Iraq, and Pakistan.

The annual growth rate in the quantity of Iranian pistachio exports between 2018 and 2022 stands at a steady 7%, indicating a promising trajectory for the future.

Iran's pistachio exports boast a diverse range of products, catering to various consumer preferences:

**Naturally Open In-Shell Pistachios:** These account for the lion's share of Iran's exports, reaching roughly 70%. Their convenience makes them a popular choice in the Commonwealth of Independent States (CIS) region and other markets.

**Natural Pistachio Kernels:** These shelled pistachios comprise approximately 20% of Iran's exports. They offer versatility for consumers who prefer to incorporate pistachios into various recipes or snacks.

**Other Products:** Iran also exports green peeled pistachio kernels (GPPK), pistachio oil, and pistachio paste, catering to specialized culinary needs and further adding value to their pistachio industry.

# The Future of Pistachio in the Global Market

The global pistachio market is projected to be a powerhouse industry, with a current estimated size of 4.70 billion USD in 2024. Analysts predict this market to experience

significant growth, reaching a staggering 15.85 billion USD by 2029. This translates to a compound annual growth rate (CAGR) of 4.47% over the forecast period (2024-2029).

Exhibit 6- Projected Growth of the Global Pistachio Market  
(Source: Mordor Intelligence)



Exhibit 7- Global Pistachio Market by Region  
(Source: Mordor Intelligence)





# SWOT Analysis

## Strengths

**High Kernel Content:** Iranian pistachios are renowned for their high percentage of edible kernel compared to shell, offering better value for money.

**Favorable Growing Conditions:** Iran's climate and soil are ideal for pistachio cultivation, naturally producing pistachios with desirable flavor and texture.

**Leading Producer:** Iran consistently ranks among the top three pistachio producers globally, with a strong track record of high yields.

**Diversified Export Network:** Iran exports pistachios to over 70 countries, establishing strong trade relationships and market presence.

**Experience and Expertise:** A long history of pistachio cultivation and export has fostered deep industry knowledge and expertise within Iran.

**Investment in Research & Development:** Iran is prioritizing the development of pistachio-specific technologies aimed at improving yield, quality, and sustainability.

**Focus on Sustainability:** New technologies are being developed to address challenges like biennial bearing (alternate years of high and low yields) and minimize environmental threats.

**Processing Efficiency:** Modern processing techniques are being implemented to improve efficiency and reduce waste.

**Competitive Pricing:** Iran is known for offering competitive prices for its pistachios, making them attractive to a wider range of buyers.

**Strong Government Support:** The Iranian government actively supports the pistachio industry through research funding, infrastructure development, and export promotion initiatives.

## Weaknesses

**Drought and Water Scarcity:** Iran's arid climate and limited water resources pose a significant threat to pistachio production, potentially impacting yields and quality.

**Biennial Bearing:** Pistachio trees naturally exhibit cycles of high and low yields, leading to fluctuations in production and export volumes.

**Outdated Infrastructure:** Some aspects of Iran's pistachio processing infrastructure may require modernization to improve efficiency.

**Limited Storage Capacity:** Inadequate storage facilities can lead to post-harvest losses.

**Limited Investment in R&D:** Compared to some competitors, Iran may need to increase investment in research and development to stay at the forefront of technological advancements.

**Limited Marketing Budget:** Compared to major competitors, Iran might have a smaller marketing budget, hindering brand recognition and market penetration efforts.

**Focus on Bulk Exports:** While Iran excels in bulk exports, there may be opportunities to expand into higher-value, branded products requiring stronger marketing strategies.



# SWOT Analysis

## Opportunities

**Rising Health Awareness:** Consumers are increasingly recognizing the health benefits of pistachios, driving a surge in demand.

**Expanding Markets:** New markets in Asia, particularly China and India, are presenting significant growth potential.

**Product Innovation:** Developing new value-added products like flavored pistachios or pistachio spreads can cater to evolving consumer preferences.

**Precision Agriculture:** Utilizing technologies like drones for monitoring and irrigation optimization can improve efficiency and yield.

**Enhanced Processing Techniques:** Advanced technologies like automated sorting and packaging can streamline processing and reduce costs.

**E-commerce Expansion:** Leveraging online platforms can facilitate direct sales to consumers and expand reach to new markets.

**Building Brand Recognition:** Investing in targeted marketing campaigns can build brand recognition and loyalty in key markets.

**Collaboration with International Companies:** Partnering with international food processing and distribution companies can increase market access and reach.

**Joint Research & Development:** Collaborating with other pistachio producing nations on research initiatives can benefit the entire industry.

**Participation in Trade Shows and Events:** Actively participating in international trade shows and events can showcase Iranian pistachios and foster new business relationships.

## Threats

**Emerging Producers:** New players in the global market like Turkey, California (USA), and Afghanistan are increasing production, posing a competitive threat to Iran's market share.

**Price Pressure:** Intensified competition can lead to price wars, potentially reducing profit margins for Iranian producers.

**Disease and Pests:** Climate change and increased global trade can facilitate the spread of new pests and diseases, impacting pistachio tree health and yields.

**Extreme Weather Events:** More frequent droughts, floods, and heat waves can disrupt production cycles and lead to crop losses.

**International Sanctions:** International sanctions can disrupt trade flows and make it challenging to access vital resources like fertilizers and pesticides.





## International Regulatory Frameworks

The global pistachio industry operates within a framework of international standards and licenses designed to ensure product quality and safety. Understanding these regulations is crucial for successful participation in the pistachio trade.

### Essential Standards:

#### Food Safety

A range of health standards play a critical role in the pistachio industry. These include ISO 9001 (Quality Management), Halal (Islamic dietary law compliance), HACCP (Hazard Analysis and Critical Control Points), GMP (Good Manufacturing Practices), GAP (Good Agricultural Practices), SSOP (Sanitation Standard Operating Procedures), IFS (International Featured Standards), BRCGS (Brand Reputation Compliance Global Standards), ISO 22000 (Food Safety Management Systems), FSSC 22000 (Food Safety System Certification), KOSHER (its production adheres to all Kosher Law requirements), BRC (British Retail Consortium), ISO 14001 (Environmental Management Systems (EMS)), OHSAS 18001 (Occupational Health and Safety), ISO 10004 (Focus on customers external to the organization), SMETA (Sedex Members Ethical Trade Audit) and ISO 17025 (Testing and Calibration Laboratory Accreditation).

These standards mandate a series of tests to ensure the physical characteristics, microbiological safety (absence of harmful bacteria), pest residue control, proper use of preservatives and food additives in pistachio.

### Global Guidelines:

**UNECE Standard DDP-08:** The United Nations Economic Commission for Europe (UNECE) has established the UNECE Standard for pistachios (DDP-08). This framework provides clear guidelines concerning quality requirements, including minimum maturity, size, moisture content, freedom from defects (blemishes, insect damage, foreign matter), and proper packaging. Meeting these standards allows pistachio producers and exporters to cater to a wider international market.

### Sanitary and Phytosanitary Measures (SPS):

**SPS Agreement:** The World Trade Organization (WTO) Agreement on the Application of Sanitary and Phytosanitary Measures (SPS Agreement) establishes the framework for SPS measures. These measures aim to protect human, animal, and plant health from risks associated with the import and export of food products.

**A140 Special Authorization:** Certain SPS requirements necessitate a Special Authorization (A140) for importing pistachios. This entails prior import authorization and stringent regulations regarding the import, export, transport, and handling of potentially hazardous materials like genetically modified organisms (GMOs) and irradiated foods. A permit from the Genetic Engineering Approval Committee is required for GMOs, while irradiated food necessitates a license from the Department of Atomic Energy.

Understanding and adhering to these standards and licenses is paramount for pistachio industry participants. By ensuring the quality and safety of their products, pistachio producers and exporters can navigate the global market with confidence and contribute to a flourishing international pistachio trade.

A top-down view of a wooden bowl filled with pistachios. The bowl is centered in the frame, and the pistachios are scattered throughout it. The background is a light, textured surface, possibly a tablecloth, with more pistachios scattered around the bowl. The entire image has a semi-transparent green overlay.

## Some Iranian Prominent Companies in Pistachio Industry

Iran's Pistachio industry thrives due to the efforts of a multitude of companies, each contributing its expertise to various segments of the value chain. Here, we highlight a few prominent companies.



# Kian Chrysolite Pistachio Company



## Brief Overview

Kian Chrysolite Pistachio Company utilizes modern equipment and expert leadership throughout its production processes.

The company offers a wide variety of pistachio types and forms, including Round, Long, Kernels, Closed, and more. Their products are sold in both domestic and international markets.

Kian Chrysolite Pistachio Company is a proud member of the International Nut and Dried Fruit Association.

## Products/Services

Types of pistachios and pistachio kernels

## Achievements

Participation in Exhibitions:

- Gulfood Dubai 2018, 2017
- Alimentaria Spain 2016
- HKTDC Food Expo 2017

## Certificate and Standards

- HALAL
- GMP
- ISO 22000
- ISO 10004
- ISO 9001
- HACCP

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# Karvan Tandis Toos Company



## Brief Overview

Karvan Tandis Toos Company has been established in Mashhad's commercial landscape since 1994 under "Narmak" trademark. The company continues to increase and expand our range of high-quality healthy dried fruit and nuts products. Company's goal is to provide our customers with the highest quality nuts and dried fruits. Company's team is committed to service to international and domestic customers in order to achieve complete satisfaction of their needs

## Certificate and Standards

- Halal
- HACCP
- ISO 9001
- ISO 22000
- ISO14001
- BS OHSAS 18001

## Products/Services

Pistachios, Seed kernels, Pistachio Kernels, Dates, Raisins, Nuts

## Achievements

Participation in Exhibition

- Mihas Malaysia: 2013
- Sial France: 2012

Markets of Middle East including Iraq, UAE and Yemen, Europe including Spain and Turkey

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# Nazari Company



## Brief Overview

Nazari Pistachio Company has been known as one of the main exporters of pistachios since 1973. Their ancestors named and reproduced a new type of pistachio "MOMTAZ". They constructed Pistachio orchards in Ravar, Zarand, and Rafsanjan. The company also built various stocks intending to develop export activities and expand the factory. Meeting the standards is a must when the company competes on an international level to supply the demands globally from the Middle East to Europe. This company cooperates with their quality control experts have been able to satisfy their customers' demands in terms of quality and safety standards all around the world.

## Certificate and Standards

- KOSHER certificate
- IFS FOOD certificate
- HALAL

## Products/Services


Types of in-shell pistachios and pistachio kernels

## Achievements

- The company is able to detect Aflatoxin with the method of HPLC in its laboratories. The company has the most up-to-date and advanced production machines. In the years 2014-2015, Nazari Pistachio was recognized as the largest exporter of green kernels in the world.

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# Green Diamond Tree Company



GREEN DIAMOND TREE  
FINEST PISTACHIOS

## Brief Overview

Green Diamond Tree Company, based in Tehran, is producer and exporter of Iranian pistachios to all over the world for long period of time and started in 1935. The company offers bulk packaging to over thirty foreign markets and our many years of experience allow us to react daily to changing market conditions. The environment and healthy pistachio have always been a value of Green Diamond Tree.

## Certificate and Standards

- ISO 17025
- SMETA
- BRC FOOD
- FSSC 22000
- HALAL
- HACCP

## Products/Services

Types of Pistachios from In shells to Kernels, Processed Pistachios to Pistachio Oil.

## Achievements

- Groundbreaking research and development has led the way to pioneering advances in agriculture and orchard management, including control of aflatoxin and reduction of chemicals and pesticides. Using innovative techniques not only conserve water and preserve our natural resources, but ultimately allow the orchard to produce healthier nut more efficiently.
- The company has regular researches to minimize risk of aflatoxin in its pistachios and their success in high quality market of Japan is the result of this research.



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# Rasha Pistachio Company



## Brief Overview

Rasha Pistachio has been founded in 2004. This company located in Sirjan (Kerman province of Iran). As Rasha Pistachio Company works as a wholesaler its packaging can be used for both re-packers and retailers.

Rasha Advantages:

- Applied drip irrigation for our pistachio farms, which saves up to 30% of water.
- Rasha Pistachio Company has modernized the processing and sorting machineries and this company has been updating our system on a monthly basis.
- Is equipped with sorting, laser, and color sorting machines

## Certificate and Standards

- ISO 22000
- ISO 9001
- HACCP
- FSCC

## Products/Services

Types of pistachios and dates

## Achievements

Exporting to more than 20 countries including to European countries, India and Persian Gulf countries



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# Viraman Company



## Brief Overview

Viraman Company (Private Joint-stock) was established in 1982. From the beginning, the company started its activity, in processing, sorting, packaging and export of different types of saffron, pistachio in shell and pistachio kernel. Viraman has gradually succeeded to promote its performance by considerable investments and employing efficient and experienced managers. The central office is located in Tehran. Viraman has 2 plants for dry and wet Pistachio processing in Kerman and Khorasan Provinces.

## Products/Services

Types of Pistachios, Pistachio kernels, and Saffron

## Achievements

- Top National Exporter (2020)

## Certificate and Standards

- ISO 22000
- ISO 9001
- HACCP
- FSCC 22000
- ISO 2010

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# Pariz Nam Gostaran Tejarat Pars Company



## Brief Overview

Pariz Nam Gostaran Tejarat Pars Company, known by its brand name "Pariz Nuts," was established in 2014 in Sirjan, Kerman province, Iran. Our mission is to deliver pistachios directly from our gardens to international markets.

The company combines the wisdom of our ancestors in pistachio production with cutting-edge processing facilities, ensuring it stays at the forefront of technological advancements. Pariz Nuts is synonymous with premium quality and service. Pariz Nuts takes great care to maintain the land and its environment, ensuring the orchard and surrounding ecosystem thrive for generations to come.

## Products/Services


Pistachio, date

## Achievements

- This company has two modern processing lines.
- Pariz takes samples from whole product according to European standard guideline and send it to a laboratory in Rafsanjan which is confirmed by EU standard organization. This test is for recognition of the level of Aflatoxin.

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# Kerman Commerce Development (KCD) Company

## Brief Overview

Kerman Commerce Development Company (KCD) was established in Kerman, Iran in 1991. KCD lunched the first full automatic pistachio processing line in 1993. Pistachio Planting, harvesting, processing, storage, grading, packing & export all are done in KCD using the most modern techniques guarantying that its pistachios meet the highest quality and food safety standards.

This company aspire to provide our customers with consistently superior quality, food safety and service by holding ourselves to standards far beyond our direct competition. KCD strive for environmental sustainability in our processes, technologies and packages by conserving energy, water and other resources.

## Certificate and Standards

- HACCP
- ISO 22000
- HALAL
- ISO 9001

## Products/Services

Pistachio in shell, Kernels with skin & green kernels with different grades

## Achievements


- This company has 5 specific fully automatic production lines in 6 different production areas including: Hygienic sun drying field, naturally open in shell pistachios line (NO), Mechanically open in shell pistachios line (MO), pistachio kernel line (PK), green peeled pistachio kernel (GPPK) and pistachio cracking line.

- Exports its products to the Persian Gulf & neighbor countries such as Iraq, Saudi Arabia, Kuwait, UAE & India and has a big market share in Europe, Canada & Russia and planning to export and earn market share in Japan & Australia in near future.

KCD build strong relationships in the fast growing markets of India and China, as well as maintaining established routes to markets in Asia, Europe and the Middle East.

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# Middle East Products Export (MEPE) Company



## Brief Overview

Middle East Products Export (MEPE) Company was founded in 1950. Over the past seven decades, MEPE has become one of the major dried fruits producers in the region while pioneering and leading the dried fruits trading industry in Iran. Throughout the years, the company has been instrumental in introducing solutions that transform unsustainable farming methods caused by numerous small-scale farms and outdated trading practices in Iran. These solutions promote modernized and sustainable agricultural practices.

## Certificate and Standards

- ISO 9001
- ISO 22000
- HACCP
- HALAL

## Products/Services


Pistachio, Pistachio kernels, Dates, Raisins

## Achievements

- 8-Time Award Winner: Best Iranian Dried Fruits Exporter in the years 2000, 2001, 2003, 2006, 2007, 2010, 2011 and 2013
- Exporting to more than 45 countries across five continents, while facilitating convenient shipping and services.
- Participation in the Gulfood 2024 Dubai exhibition

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# Middle East Senate Exporting Company



## Brief Overview

Middle East Senate Exporting Co. is one of the leading manufacturers and exporters of dried fruits and nuts in Iran and Unique is their Trade-mark. their slogan is "actions speak louder than words" which will achieve the vision of "Unique in MiddleEast". Their philosophy is to deliver high quality products, competitive pricing, valuable services and support to its customers all around the world. The development of innovative production methods, emphasis on product quality and individualized customer services all together have provided company a huge growth over the last 15 years.

## Certificate and Standards

- ISO 9001
- ISO 22000
- HACCP
- HALAL
- KOSHER

## Products/Services

Dates, Pistachio, Raisins

## Achievements

Modern & Hygienic Technology:

- X-RAY SCANNED
- LASER SORTED
- METAL DETECTED

Participation in exhibitions:

- SIAL Paris 2014
- World Food Moscow 2014

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# Majd Pistachios Company



## Brief Overview

Majd Pistachios is an Iranian benchmark producer and exporter of pistachios that was founded in 1872. This company carries out every step of the process under the same supervision from growing to exporting, which makes them one of the very few companies in the industry capable of controlling all standards and quality measures. Majd's technicians prepare the products for each of its producers, taking into account each of the parameters that are important including varieties, sizes, and types. Pistachios are offered in bulk or packaged in different formats. This company has customers from all over the world and has the capacity to produce 10,000 tons of pistachio a year.

## Products/Services

Types of Pistachios and Pistachio Kernels

## Achievements

- This company uses the latest and most modern machinery to peel, dry and sort the pistachios

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## Brief Overview

Padideh Pistachio company founded 45 years ago in Sirjan, Kerman province. This company do all the pistachios processing including packaging, roasting, and laboratory testing. Padideh pistachio company is one of the leading exporters of Sirjan pistachio in which we can provide different varieties of pistachio nuts in different sizes. Pistachio kernels are also available, graded by color, size and quality.

## Certificate and Standards

- ISO 22000
- ISO 9001
- HACCP

## Products/Services

Types of pistachios and pistachio kernels

## Achievements

- Participation in the DUBAI GULFOOD exhibition in 2021
- Participation in relevant exhibitions in Hong Kong / Paris / Shanghai, China / India and Russia
- Import to China and the Persian Gulf countries

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# Beyond Potential Pistachio

This report sheds light on Iran's dominance in the global date industry. We begin with a concise examination of Iran's food and agriculture sectors. We then delve into the distinctive qualities of Iranian dates and explore the country's remarkable production capacity. Following this, the report analyzes Iran's position in the global date export market and the industry's overall structure. Finally, we showcase prominent Iranian companies that are instrumental to the sector's success. This report equips businesses and investors with valuable insights for navigating the opportunities within Iran's thriving date industry.