



ANALYSIS OF MARKET STRUCTURE, COMPETITIVENESS AND TRADE-FLOW DETERMINANTS OF AFGHANISTAN'S GRAPES IN GLOBAL STAGE

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SUMMARY

WALID QARAR. Analysis of Market Structure, Competitiveness and Trade-Flow Determinants of Afghanistan's Grapes in the Global Stage. Supervised by NIA ROSIANA, and RITA NURMALINA.

Grapes are one of the most important agricultural commodities for Afghanistan, playing a crucial role in rural livelihood, exports, GDP, and revenues. Both fresh and dried grapes have been produced and exported by Afghanistan to regional and global markets. Together with a long cultivation history and favorable conditions for grape production in Afghanistan, the country remains limited in its exports to a small number of higher-value markets and is mostly concentrated on regional markets such as India and Pakistan. The global grape market is characterized as a highly competitive market among major exporters, with increasing quality and trade standards, which creates challenges for the country while expanding its export markets and enhancing its competitiveness in the global markets.

This study is designed to analyze the global market structure for grapes and specify the position and role of Afghanistan in it, study the Afghanistan grape exports competitiveness in comparison to the major global grape exporters, and identify the factors that affect the Afghan grape exports in the global market, together with untapped markets for Afghan grapes. The study employed a qualitative approach and obtained data from international trade databases for multiple years, in different periods between 2008 and 2024, in different analyses. In market structure analysis, the study used Concentration Ratio and Herfindahl–Hirschman Index to evaluate the concentration ratios and levels. The grapes export competitiveness is measured by using Revealed Comparative Advantages and Dynamic Revealed Comparative Advantages in succession. for determining the trade affecting factors the study used gravity model of PPML methods in which the study analyses economic size of partner countries as GDP and Population, Economics distance for study distance proximity between Afghanistan and partner countries, partner exchange rate, Afghanistan RCA value, Partner SPS, Common border, common language and importer landlocked status for other helping indicators and trade barriers.

The results showed that global grape market exports are moderately concentrated, with several major exporters dominating the global grape markets, but still, countries like Afghanistan play a crucial role in mostly niche markets. Major exporting countries, such as China, Italy, Spain, the USA, and Turkey, generally account for a large share of global grape exports, indicating an oligopolistic market structure. These countries maintain their position through an advanced system of production, modernized logistic technologies, and a well-developed market network. Afghanistan's share remains relatively small in comparison to these countries, despite the country having favorable conditions and a long history of grape cultivation.

The RCA result showed that Afghanistan possesses a strong comparative advantage in grape exports, , which are well-known around the globe for quality and traditional production methods of raisins. The RCA of fresh grapes was very low compared to dried grapes; it may be due to post-harvest loss, perish ability, limitation in storage, and higher transportation cost. The results also showed that



the export of Afghanistan's grapes is very concentrated on a few regional markets, especially for fresh grapes, Pakistan, and India. Both of these account for a big portion of Afghan grape exports, which are associated with fluctuations due to policy changes, border disruption, and political tension.

The Afghan grapes demonstrate a higher comparative advantage over the period in comparison to global major exports, especially in dried grapes, which are well-known around the globe for quality and traditional production methods of raisins. The RCA of fresh grapes was very low compared to dried grapes; it may be due to post-harvest loss, perish ability, limitation in storage, and higher transportation cost. The results also showed that the export of Afghanistan's grapes is very concentrated on a few regional markets, especially for fresh grapes, Pakistan, and India. Both of these account for a big portion of Afghan grape exports, which are associated with fluctuations due to policy changes, border disruption, and political tension. The dynamics comparative advantages results showed that the country could not successfully reconstruct its exports for many periods, as they lost global pace.

The gravity estimation further revealed that the economic size of the partner country, distance, trade barrier, and influence play a significant role in determining exports for Afghanistan, while their effects vary in different types of grapes due to perish ability. Larger GDP and population of the importing country are affecting the grapes export positively because of the larger GDP and population, creating more demand for importing commodities. Distance negatively affects the export, as the larger the distance between Afghanistan and the importer, the smaller the amount of grapes exported to that country, particularly in fresh grapes, as it is mostly concentrated on regional markets. Common language was not a factor that influenced the grape exports, as it is customary that common languages do not affect the export of agricultural products. The importer exchange rate was also a significant factor in some types of grapes, especially dried grapes. The landlocked status of the importer was also a significant factor for total and dried grapes; the Afghan RCA was also a factor influencing exports, especially in fresh and dried grapes. In general, each factor had a different result for each grape type. The estimation shows that many high-value markets, specifically in Europe, are waiting as an untapped potential market for Afghanistan grapes, especially dried grapes. While fresh grapes remain on the market due to their perish ability..

The study suggests that improving trade infrastructure, strengthening product quality, and diversifying markets are needed for Afghan grapes to enhance their competitive position in the global markets. The country should prioritize dried grapes for diversification. The country should address institutional constraints effectively. The country should develop cold chain facilities and manage post-harvest stems to reduce losses. For enhancing competitiveness, the country should work on quality and certification.

Keywords: Afghanistan, export competitiveness, global grape market, gravity model, market structure



RINGKASAN

WALID QARAR. Analisis Struktur Pasar, Daya Saing, dan Determinan Arus Perdagangan Anggur Afghanistan di Pasar *Global*. Dibimbing oleh NIA ROSIANA dan RITA NURMALINA.

Anggur merupakan salah satu komoditas pertanian utama Afghanistan yang berperan strategis dalam mendukung mata pencaharian pedesaan, ekspor, Produk Domestik Bruto (PDB), serta pendapatan nasional. Baik anggur segar maupun kering telah diproduksi dan diekspor ke pasar regional maupun global. Meskipun Afghanistan memiliki sejarah panjang budidaya anggur dan kondisi agro-klimat yang menguntungkan, ekspor negara ini masih terbatas pada sejumlah pasar bernilai tinggi dan terkonsentrasi di pasar regional seperti India dan Pakistan. Pasar anggur global bersifat sangat kompetitif di antara eksportir utama, dengan standar kualitas dan perdagangan yang semakin ketat, sehingga menimbulkan tantangan signifikan bagi Afghanistan dalam memperluas pasar ekspor dan meningkatkan daya saing globalnya.

Penelitian ini dirancang untuk menganalisis struktur pasar anggur global dan memposisikan peran Afghanistan di dalamnya, mengevaluasi daya saing ekspor anggur Afghanistan dibandingkan eksportir global utama, serta mengidentifikasi faktor-faktor yang memengaruhi ekspor anggur Afghanistan sekaligus mengungkap peluang pasar potensial yang belum tergarap. Pendekatan kualitatif diterapkan dengan memanfaatkan data dari basis data perdagangan internasional periode 2008-2024. Analisis struktur pasar menggunakan *Concentration Ratio* dan Indeks *Herfindahl-Hirschman* (HHI), sedangkan daya saing ekspor diukur melalui *Revealed Comparative Advantage* (RCA) dan *Dynamic RCA*. Faktor penentu perdagangan dianalisis menggunakan model gravitasi dengan metode *Poisson Pseudo-Maximum Likelihood* (PPML), yang mencakup variabel ukuran ekonomi mitra dagang (PDB dan populasi), jarak ekonomi, nilai tukar mitra, nilai RCA Afghanistan, standar *Sanitary and Phytosanitary* (SPS) mitra, perbatasan bersama, bahasa bersama, serta status daratan importir.

Hasil penelitian menunjukkan bahwa ekspor anggur global bersifat moderat terkonsentrasi, didominasi oleh eksportir utama seperti Tiongkok, Italia, Spanyol, Amerika Serikat, dan Turki yang menguasai pangsa pasar besar melalui sistem produksi canggih, teknologi logistik modern, dan jaringan pasar yang mapan, mencerminkan struktur pasar oligopolistik. Afghanistan berperan penting di segmen pasar niche meskipun pangsa pasarnya relatif kecil. Analisis RCA mengungkapkan keunggulan komparatif kuat Afghanistan dalam ekspor anggur, khususnya anggur kering yang terkenal secara global berkat kualitas dan metode produksi tradisional kismis. RCA anggur segar jauh lebih rendah akibat kerugian pasca-panen, daya tahan terbatas, kendala penyimpanan, dan biaya transportasi tinggi. Ekspor anggur Afghanistan terkonsentrasi di pasar regional Pakistan dan India yang fluktuatif akibat perubahan kebijakan, gangguan perbatasan, dan ketegangan politik, sementara keunggulan komparatif dinamis menunjukkan ketidakmampuan negara mempertahankan momentum ekspor global.

Estimasi model gravitasi mengungkapkan bahwa ukuran ekonomi mitra dagang, jarak, hambatan perdagangan, dan pengaruh geopolitik berperan signifikan dalam menentukan ekspor Afghanistan, dengan efek yang bervariasi

antar jenis anggur akibat perbedaan daya tahan. PDB dan populasi importir yang lebih besar mendorong ekspor positif melalui permintaan yang tinggi, sementara jarak berpengaruh negatif, terutama pada anggur segar yang terkonsentrasi di pasar regional. Common language tidak berpengaruh signifikan, sebagaimana lazim pada produk pertanian, sedangkan nilai tukar importir, status daratan, dan RCA Afghanistan memengaruhi ekspor anggur kering dan segar secara berbeda. Hasil estimasi mengidentifikasi pasar bernilai tinggi di Eropa sebagai *untapped potential market* utama, khususnya untuk anggur kering, sementara anggur segar terhambat oleh kerentanan pasca-panen.

Penelitian merekomendasikan penguatan infrastruktur perdagangan, peningkatan kualitas produk, dan diversifikasi pasar untuk meningkatkan posisi kompetitif anggur Afghanistan. Prioritas strategis meliputi pengembangan anggur kering untuk diversifikasi pasar, penanganan kendala institusional, pengembangan fasilitas cold chain, pengelolaan pasca-panen, serta sertifikasi kualitas untuk daya saing global.

Kata Kunci: Afghanistan, daya saing ekspor, pasar anggur global, model gravitasi, struktur pasar

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ANALYSIS OF MARKET STRUCTURE, COMPETITIVENESS AND TRADE-FLOW DETERMINANTS FOR AFGHANISTAN'S GRAPES IN GLOBAL STAGE

WALID QARAR

Thesis

Of Master's Degree submitted to the Master of Science in Agribusiness Program
in partial fulfilment of the requirements for the degree of Master of Science

**MASTER OF SCIENCE IN AGRIBUSINESS
FACULTY OF ECONOMICS AND MANAGEMENT
BOGOR AGRICULTURAL UNIVERSITY
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PREFACE

Praise and gratitude are expressed to Almighty God for His blessings and mercy, allowing the author to complete this thesis entitled *“Analysis of Market Structure, Competitiveness and Trade-Flow Determinants of Afghanistan’s Grapes in the Global Stage”*. This thesis is prepared as a requirement for obtaining a Master's degree in the Agribusiness Science program. This research focuses on the international trade in the field of agribusiness of Afghanistan vs. major exporter nations in the globe and major importing destination for afghan grapes and raisins, in which the study will compare the international agribusiness trade related dynamics of latest years for competitive purposes, also will study trade determining factors influence Afghanistan grapes flows to major destinations than will bring some potential markets for Afghan total , fresh and dried grapes in current markets .

The author realizes that the completion of this thesis would not have been possible without the support and assistance of many parties. Therefore, the author would like to express the deepest gratitude to the (IPB University , Economics and Management Faculty , Agribusiness Science Department related heads, lecturers and staffs) and special thanks to my both supervisors (Dr. Nia Rosiana, S.P., M.Si and Prof. Dr. Ir. Rita Nurmalina, M.S) for supervising me in this these .Also my family specially my Mom and sweet wife , my brothers and sisters and uncle together with their families and colleagues who have provided support, suggestions, and motivation throughout the research and writing process. The author hopes that the results of this research can contribute positively to the agribusiness trade policies related organs in Afghanistan and help the sector stockholders .

Hopefully this scientific paper will be useful for those in need and for the advancement of science.

Bogor, July 2026

Walid Qarar

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