

Export potential of Armenia's agro-food sector on the global market: top-10 destinations for top-20 products

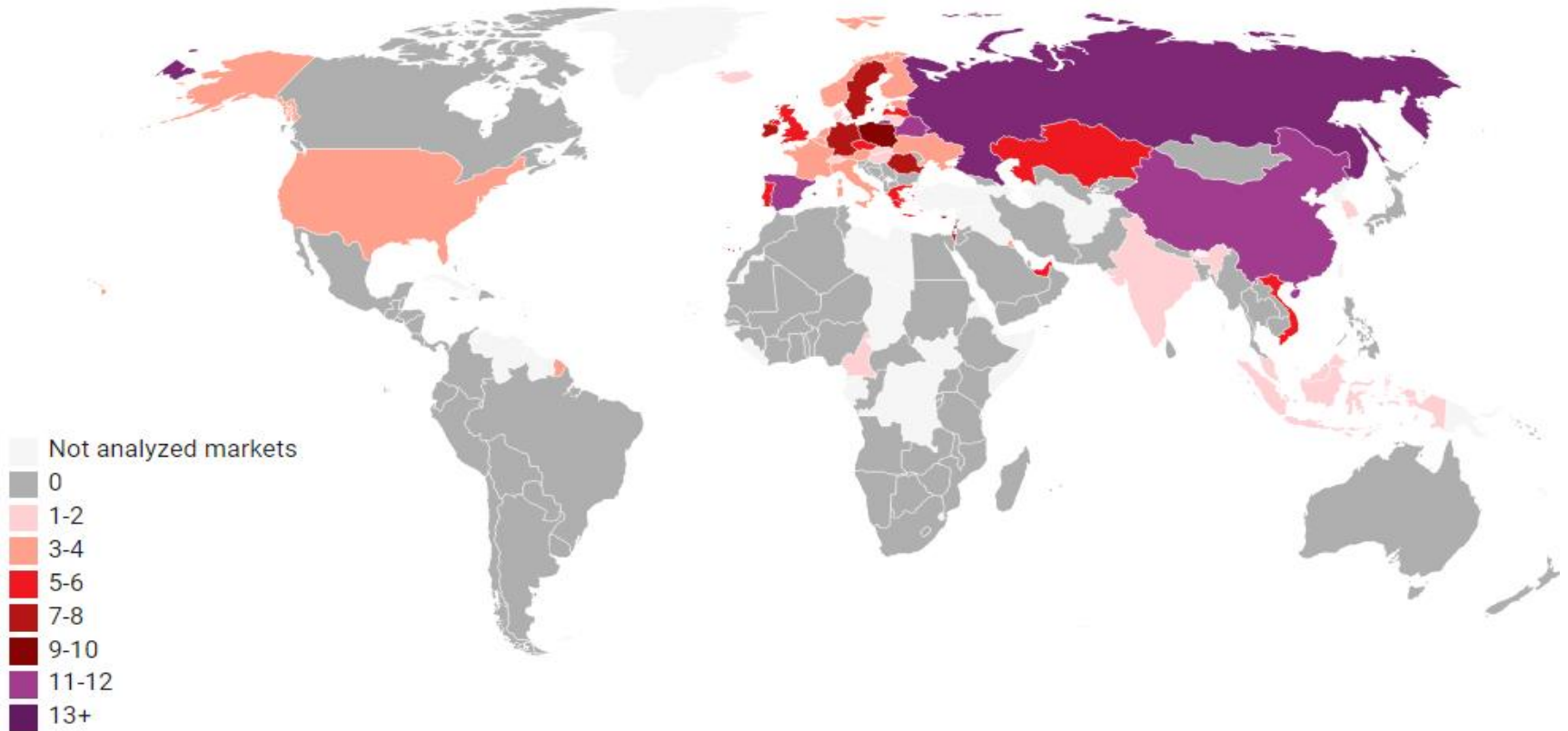
Berlin/Yerevan, October 2019

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Explanatory note

- This technical note accompanies **Policy Briefing PB/01/2019 “Export potential of Armenia’s agro-food sector on the global market”**
- Aim of PB/01/2019: identification of ARM agro-food products with the highest export potential globally
- Export potential assessment is done in two stages:
 - Stage I: Identification of top-20 products with the highest potential*
 - Stage II: Identification of top-10 export destinations for each of top-20 products*
- Here, we present **results of Stage II assessments**

Map of the world with the highest export potential for Armenia's agro-food products



Sources: Own estimates

Note: The value assigned to each country refers to how often the country was mentioned in the Top-10 destinations calculated for each of the Top-20 products

No.1: HS 220820 “Spirits obtained by distilling grape wine or grape marc”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	77	Russia	385	38%	yes	yes	yes
2	73	Latvia	57	70%	no	no	yes
3	72	Cyprus	2	2%	yes	no	yes
4	70	China	875	25%	yes	yes	no
5	70	UAE	29	279%	yes	no	yes
6	67	Sweden	12	5%	no	no	yes
7	65	Israel	7	30%	yes	no	yes
8	64	Belarus	27	19%	no	yes	yes
9	64	Greece	3	38%	no	no	yes
10	63	Netherlands	59	-19%	no	no	yes

Sources: Own estimates

No.2: HS 200899 “Fruit, prepared or preserved: grapes, plums, figs”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	80	Portugal	15	11%	yes	yes	yes
2	77	Norway	17	5%	yes	yes	yes
3	76	UK	136	0.2%	yes	yes	yes
4	76	Germany	197	3%	yes	yes	yes
5	76	France	191	5%	yes	yes	yes
6	76	Switzerland	24	6%	yes	yes	yes
7	74	Greece	13	21%	yes	yes	yes
8	74	Poland	44	22%	yes	yes	yes
9	74	China	190	10%	no	yes	yes
10	74	Sweden	30	5%	no	yes	yes

Sources: Own estimates

No.3: HS 200819 “Nuts and other seeds, incl. mixtures, prepared or preserved”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	83	China	130	5%	yes	yes	yes
2	77	France	280	9%	no	yes	yes
3	76	Cyprus	3	18%	yes	yes	yes
4	76	Spain	60	25%	no	yes	yes
5	75	Italy	73	14%	no	yes	yes
6	75	Germany	537	10%	no	yes	yes
7	75	Ukraine	14	61%	yes	yes	yes
8	75	Netherlands	145	5%	no	yes	yes
9	74	Switzerland	69	15%	no	yes	yes
10	74	Sweden	76	6%	no	yes	yes

Sources: Own estimates

No.4: HS 070200 “Tomatoes, fresh or chilled”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	76	Russia	559	12%	yes	yes	yes
2	73	Kazakhstan	56	51%	no	yes	yes
3	69	Belarus	218	-10%	no	yes	yes
4	65	Austria	94	0.3%	no	no	yes
5	64	Romania	93	0.2%	no	no	yes
6	64	USA	2,272	0.1%	no	no	yes
7	63	Ireland	56	3%	no	no	yes
8	62	Israel	17	18%	no	no	yes
9	61	Spain	134	30%	no	no	yes
10	61	Iceland	4	23%	no	no	yes

Sources: Own estimates

No.5: HS 060311 “Fresh cut roses and buds”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	85	Belarus	107	178%	yes	yes	yes
2	83	Finland	21	6%	yes	yes	yes
3	83	Cyprus	2	34%	yes	yes	yes
4	77	China	8	84%	yes	yes	yes
5	72	Russia	180	17%	yes	yes	yes
6	70	Norway	56	3%	yes	yes	yes
7	70	Kazakhstan	21	33%	yes	yes	yes
8	68	Czech Republic	26	3%	yes	yes	no
9	68	Sweden	34	13%	no	yes	yes
10	66	Spain	43	4%	yes	yes	yes

Sources: Own estimates

No.6: HS 220830 “Whiskies”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	81	Russia	307	23%	yes	yes	yes
2	67	Belarus	21	32%	yes	yes	no
3	67	Cameroon	17	108%	yes	no	yes
4	67	Poland	164	10%	yes	no	yes
5	66	UAE	229	647%	yes	no	yes
6	64	Israel	64	31%	yes	no	no
7	63	Ukraine	60	2%	yes	yes	yes
8	61	Slovak Republic	21	42%	no	no	yes
9	61	United Kingdom	285	23%	yes	no	no
10	60	Hungary	20	16%	yes	no	yes

Sources: Own estimates

No.7: HS 071080 “Vegetables, uncooked or cooked by steaming or by boiling in water, frozen”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	81	Cyprus	5	8%	yes	yes	yes
2	77	Romania	27	14%	no	yes	yes
3	76	Kuwait	5	34%	yes	no	yes
4	74	Kazakhstan	1	3%	yes	yes	yes
5	73	Spain	83	-1%	yes	yes	yes
6	71	Italy	171	95%	yes	yes	yes
7	71	Austria	29	1%	no	yes	yes
8	69	Belarus	34	-3%	yes	yes	yes
9	69	Greece	19	11%	no	yes	yes
10	69	Ireland	15	11%	no	yes	yes

Sources: Own estimates

No.8: HS 080810 “Fresh apples”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	82	China	116	3%	yes	yes	yes
2	81	Vietnam	67	25%	yes	yes	yes
3	71	India	308	34%	yes	no	yes
4	67	UAE	194	-8%	yes	no	yes
5	67	Russia	407	4%	yes	yes	yes
6	67	Ireland	76	1%	yes	no	yes
7	65	Indonesia	300	21%	no	no	yes
8	65	Belgium	149	17%	yes	no	yes
9	63	Kazakhstan	53	32%	yes	yes	yes
10	62	Belarus	268	-19%	no	yes	yes

Sources: Own estimates

No.9: HS 220890 “Ethyl alcohol of an alcoholic strength of < 80% vol, not denatured”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	79	Italy	34	16%	yes	yes	yes
2	77	Russia	99	26%	yes	yes	yes
3	76	Germany	296	6%	no	yes	yes
4	76	Latvia	37	102%	no	yes	yes
5	74	Czech Republic	34	21%	no	yes	yes
6	73	UAE	56	123%	yes	no	yes
7	73	Israel	10	18%	yes	no	yes
8	72	Belgium	51	11%	no	yes	yes
9	72	Sweden	26	30%	no	yes	yes
10	71	Spain	139	11%	no	yes	yes

Sources: Own estimates

No.10: HS 200799 “Jams, jellies, marmalades”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	87	China	63	32%	yes	yes	yes
2	81	Greece	11	11%	yes	yes	yes
3	79	UK	162	30%	no	yes	yes
4	75	Austria	38	10%	no	yes	yes
5	74	Sweden	35	1%	no	yes	yes
6	74	Netherlands	126	12%	no	yes	yes
7	74	Germany	222	7%	no	yes	yes
8	72	Finland	17	13%	no	yes	yes
9	71	Romania	10	31%	no	yes	yes
10	71	Poland	18	4%	no	yes	yes

Sources: Own estimates

No.11: HS 220600 “Cider, perry, mead and other fermented beverages”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	77	Poland	10	67%	yes	yes	yes
2	68	Israel	5	6%	yes	no	yes
3	68	Cyprus	3	14%	yes	yes	no
4	68	United States	221	0.3%	no	no	yes
5	67	Hong Kong	42	5%	no	no	yes
6	65	China	30	-6%	no	yes	yes
7	63	Spain	32	6%	no	yes	no
8	63	Latvia	13	22%	no	yes	no
9	63	Malta	2	8%	no	yes	yes
10	62	UK	213	8%	no	yes	no

Sources: Own estimates

No.12: HS 210390 “Preparations for sauces and prepared sauces”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	78	Poland	138	9%	no	yes	yes
2	76	Estonia	29	15%	no	yes	yes
3	76	Sweden	142	4%	yes	yes	yes
4	74	Ireland	122	19%	no	yes	yes
5	74	Russia	167	12%	yes	yes	yes
6	74	Spain	135	17%	no	yes	yes
7	74	Cyprus	11	9%	yes	yes	yes
8	73	Romania	66	25%	no	yes	yes
9	73	Vietnam	44	10%	no	yes	yes
10	72	Denmark	102	8%	no	yes	yes

Sources: Own estimates

No.13: HS 070690 “Fresh or chilled salad beetroot, salsify, celeriac, radishes and similar”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	79	Ireland	9	24%	no	yes	yes
2	76	Latvia	3	19%	no	yes	yes
3	76	Russia	27	15%	yes	yes	yes
4	74	Estonia	2	81%	no	yes	yes
5	74	Spain	5	36%	no	yes	yes
6	73	Belarus	4	-3%	yes	yes	yes
7	70	Portugal	2	3%	no	yes	yes
8	70	Kuwait	3	12%	yes	no	yes
9	69	Romania	12	2%	no	yes	yes
10	69	Poland	19	-4%	no	yes	yes

Sources: Own estimates

No.14: HS 220421 “Wine of fresh grapes, incl. fortified wines, and grape must”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	84	China	2,555	14%	yes	yes	yes
2	71	UAE	208	121%	yes	no	yes
3	69	Malaysia	79	26%	yes	no	yes
4	69	Korea	164	3%	yes	no	yes
5	68	Israel	26	15%	yes	no	yes
6	68	Vietnam	18	5%	yes	yes	yes
7	67	Latvia	69	30%	yes	no	yes
8	65	Russia	752	40%	yes	yes	no
9	64	United States	4,566	2%	no	no	yes
10	64	Poland	239	11%	yes	no	yes

Sources: Own estimates

No.15: HS 200190 “Vegetables, fruit, nuts, prepared or preserved by vinegar or acetic acid”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	80	Norway	5	16%	yes	yes	yes
2	78	China	7	40%	yes	yes	yes
3	76	Germany	162	5%	yes	yes	yes
4	75	Ireland	33	5%	no	yes	yes
5	73	France	45	2%	no	yes	yes
6	73	Belarus	4	26%	yes	yes	yes
7	72	Netherlands	58	12%	no	yes	yes
8	72	Romania	21	19%	no	yes	yes
9	70	UK	134	3%	no	yes	yes
10	66	Portugal	7	26%	no	yes	yes

Sources: Own estimates

No.16: HS 081010 “Fresh strawberries”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	87	Belarus	62	23%	yes	yes	yes
2	78	Lithuania	24	99%	no	yes	yes
3	76	Latvia	3	61%	no	yes	yes
4	74	Czech Republic	24	9%	no	yes	yes
5	74	Romania	12	1%	no	yes	yes
6	73	Russia	50	63%	yes	yes	yes
7	71	Portugal	30	6%	no	yes	yes
8	71	Spain	50	19%	no	yes	yes
9	68	Finland	12	6%	no	yes	yes
10	67	Bahrain	6	24%	yes	no	yes

Sources: Own estimates

No.17: HS 080910 “Fresh apricots”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	82	Poland	14	146%	no	yes	yes
2	80	Czech Republic	13	106%	no	yes	yes
3	80	Austria	22	50%	no	yes	yes
4	80	UK	24	34%	no	yes	yes
5	79	Romania	7	102%	no	yes	yes
6	78	Slovak Republic	3	67%	no	yes	yes
7	78	Belgium	17	16%	no	yes	yes
8	78	Sweden	3	43%	no	yes	yes
9	77	Hungary	2	48%	no	yes	yes
10	76	Russia	45	58%	yes	yes	yes

Sources: Own estimates

No.18: HS 080940 “Fresh plums and sloes”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	82	Germany	76	7%	yes	yes	yes
2	80	Poland	29	273%	yes	yes	yes
3	79	Ireland	5	25%	yes	yes	yes
4	77	China	104	-9%	yes	yes	yes
5	76	Hong Kong	95	14%	yes	no	yes
6	76	Kuwait	10	39%	yes	no	yes
7	74	Belgium	22	2%	no	yes	yes
8	73	Norway	9	-5%	yes	yes	yes
9	72	Spain	11	-2%	yes	yes	yes
10	71	Italy	15	14%	yes	yes	yes

Sources: Own estimates

No.19: HS 080830 “Fresh pears”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	73	Belarus	125	1%	yes	yes	no
2	73	Germany	238	2%	yes	no	yes
3	71	Vietnam	20	44%	no	yes	yes
4	71	China	12	-8%	yes	yes	yes
5	70	Israel	9	10%	yes	no	yes
6	67	Cyprus	3	4%	yes	no	yes
7	66	Ukraine	2	7%	yes	yes	yes
8	66	Russia	186	11%	yes	yes	no
9	64	UAE	43	-9%	yes	no	yes
10	64	United States	128	-11%	no	yes	yes

Sources: Own estimates

No.20: HS 080610 “Fresh grapes”

Rank	Composite score (max=100)	Country	Import value, 2017, USD m	Import growth, % volume, 2017/2016	Distance advantage vs average supplier, yes/no	Import duty advantage vs applied duty, yes/no	Price advantage vs average import price, yes/no
1	80	Czech Republic	81	5%	yes	yes	yes
2	79	Russia	398	98%	yes	yes	yes
3	77	Poland	170	14%	yes	yes	yes
4	77	Kazakhstan	69	23%	no	yes	yes
5	75	Estonia	10	12%	yes	yes	yes
6	75	Spain	82	72%	yes	yes	yes
7	73	Germany	721	2%	yes	yes	yes
8	73	Vietnam	59	27%	yes	yes	yes
9	73	Portugal	54	5%	no	yes	yes
10	73	Belarus	38	-60%	yes	yes	yes

Sources: Own estimates

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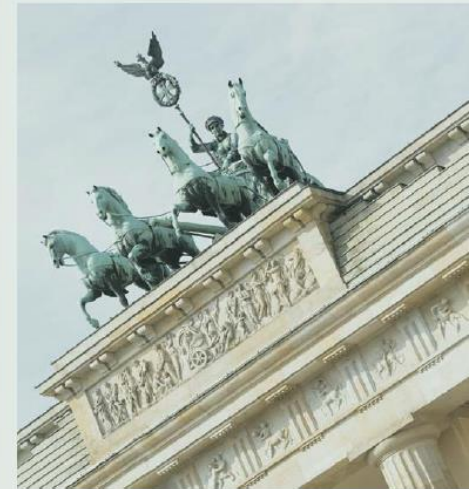
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