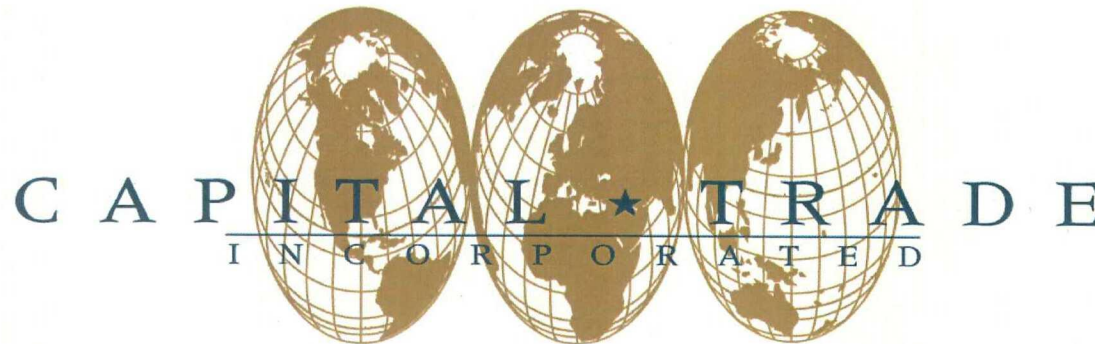


# **Raw In-Shell Pistachios from Iran**

**Inv. No. 731-TA-287 (2<sup>nd</sup> Review)**

**April 27<sup>th</sup>, 2017**

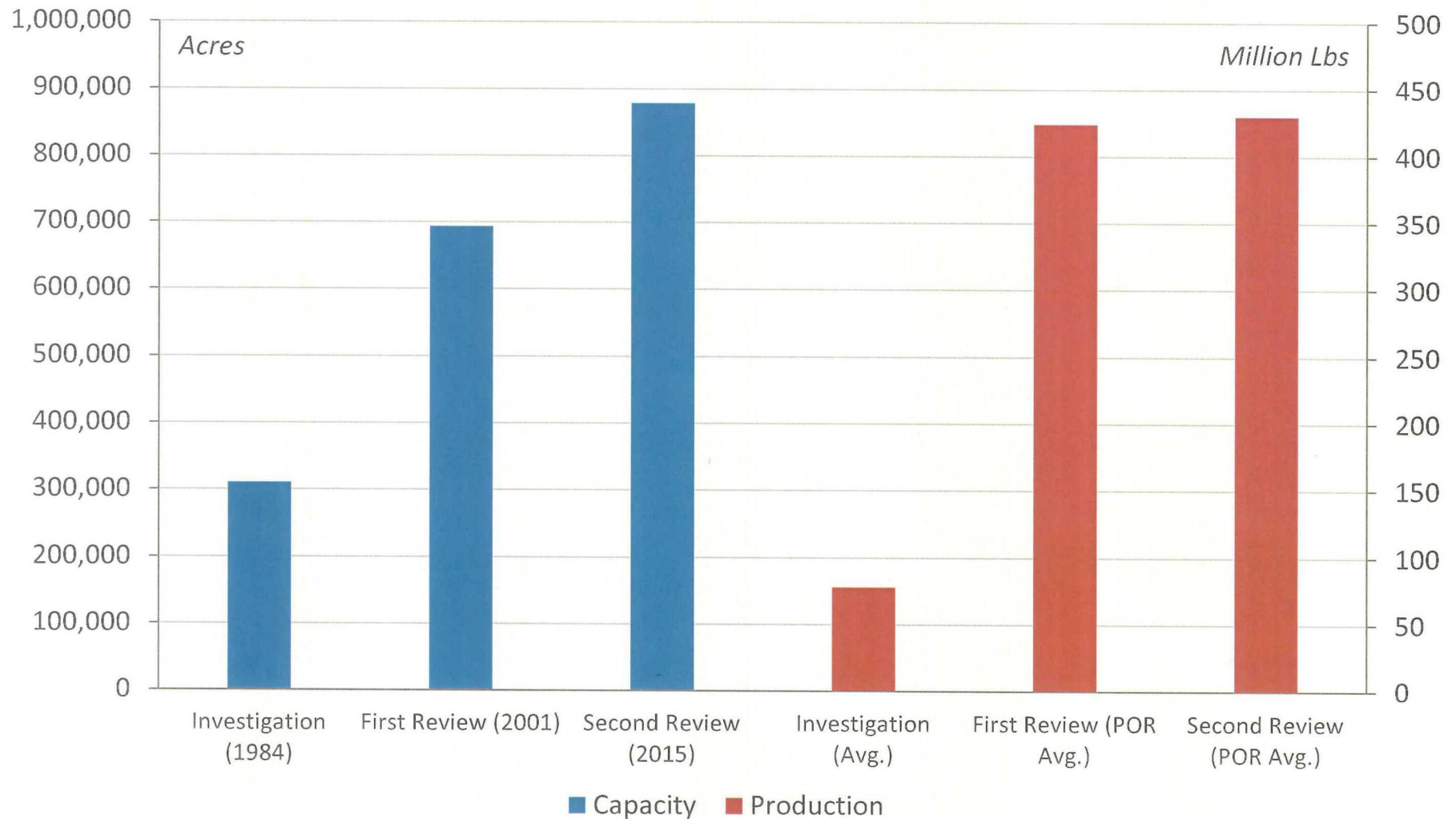
**United States International Trade Commission**



**Daniel Klett**

## Iranian Capability

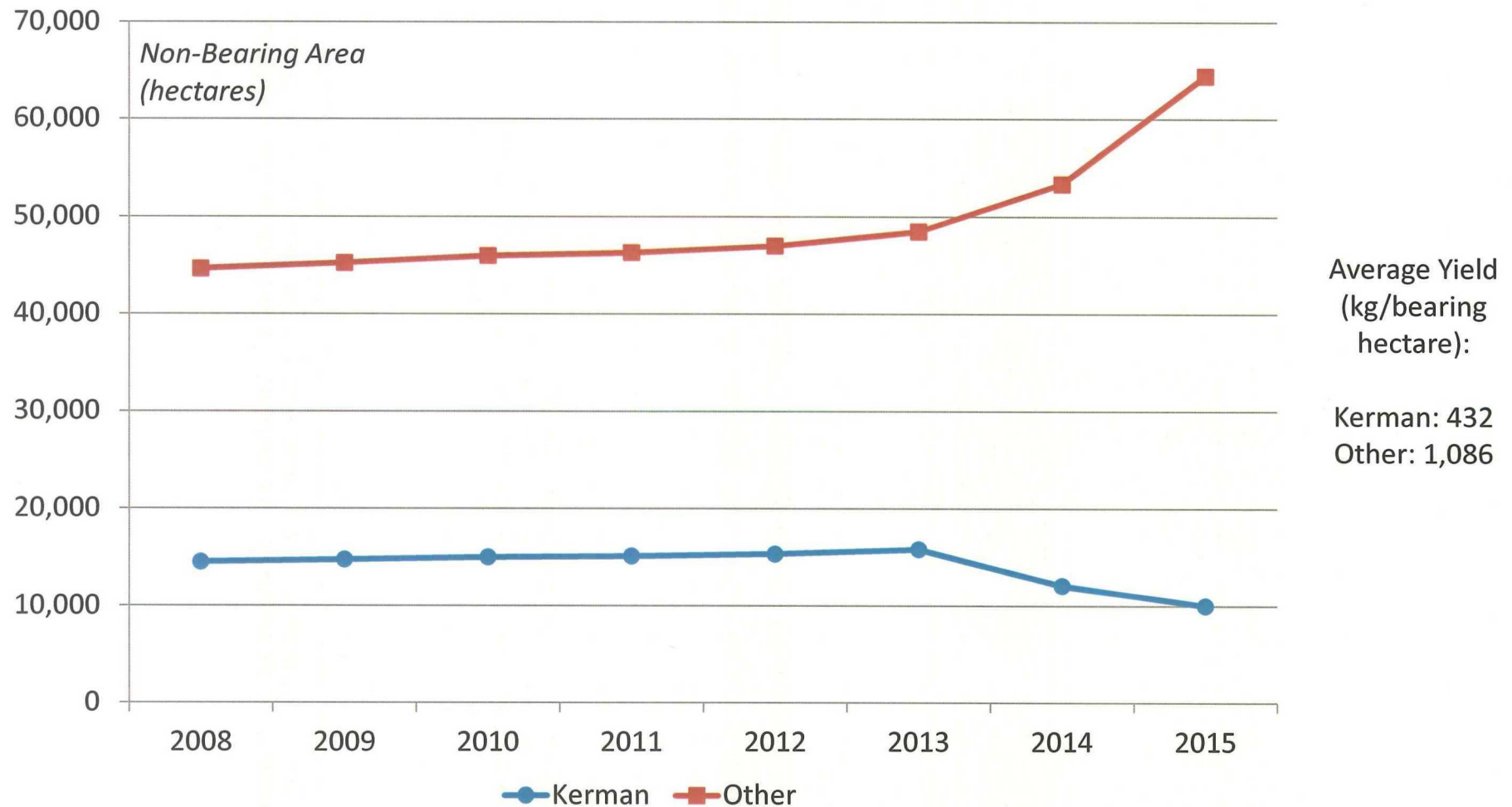
### Iran's Pistachio Growing Area and Production Have Increased



Sources: *Pistachios Inv. Staff Report*, at A-36, note 1; *Pistachios 1<sup>st</sup> Review Staff Report*, at IV-5, IV-6; *APG Prehearing Brief*, Exhibits 5, 11.

## Iranian Capability

### Iran is Diverting Pistachio New Growing Area to Higher-Yield Provinces



Source: Iranian Ministry of Agriculture data, included in *APG Prehearing Brief*, Exhibit 11.

## Iranian Capability

### Pistachio Production in Iran Will Increase—Projection Methodology

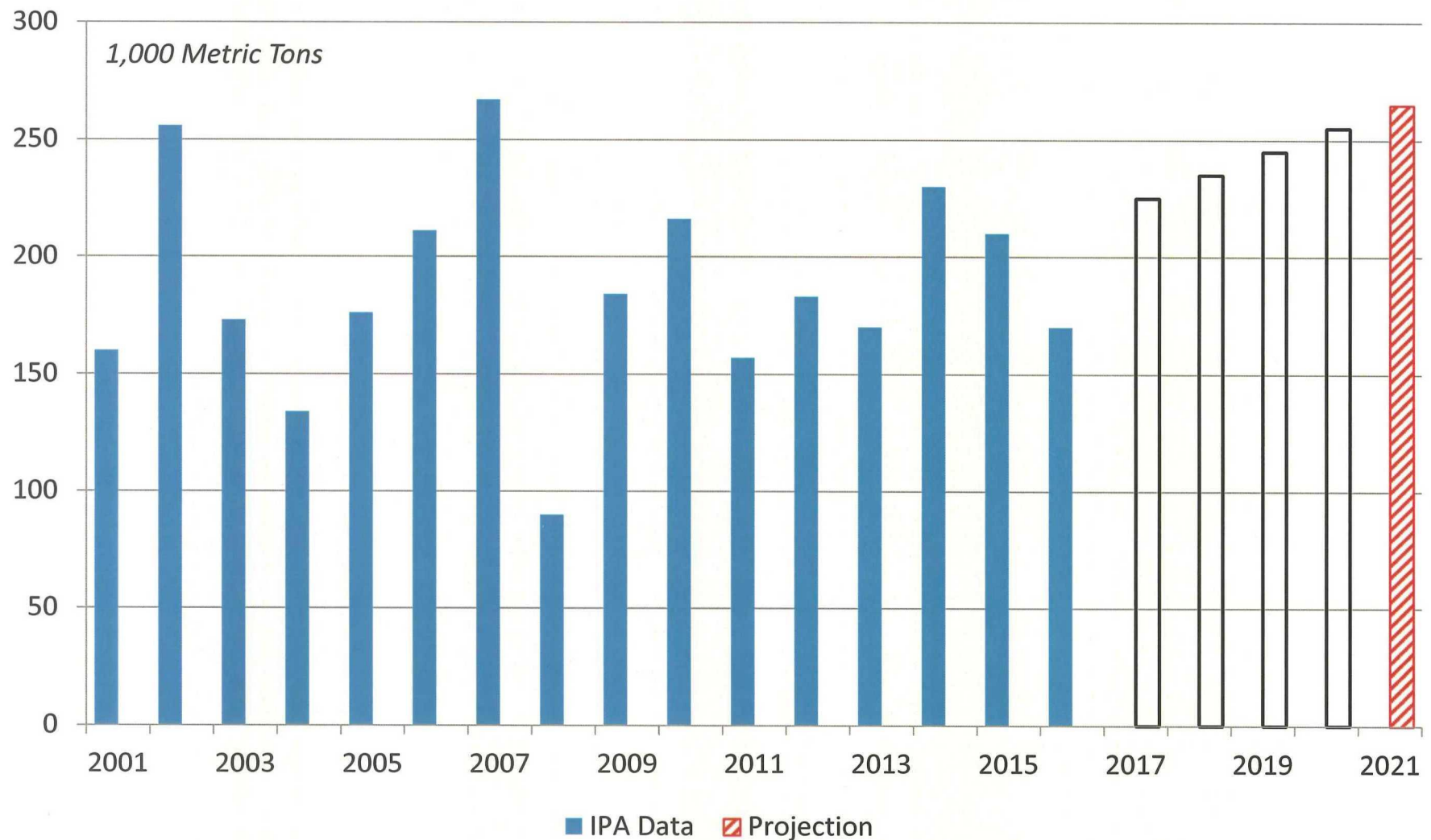
Projection of Iran Pistachio Production 2021		
Baseline = Bearing area in 2015 x average yield 2013-15	327,000 ha x 643 kg per ha =	210,000 MT
24,000 ha of non-bearing trees in 2011 that were not producing in 2015, but should be fully mature in 2021	24,000 ha x 836 kg per ha =	20,100 MT
37,000 ha of non-bearing trees in 2011 that were producing, on average, at about 50% of potential in 2015 and should be producing at full potential in 2021.	37,000 ha x 418 kg per ha =	15,500 MT
50,000 ha of non-bearing trees in 2012-15 that were not bearing in 2015 but should be bearing at an average of 50% of potential in 2021.	50,000 ha x 418 kg per ha =	20,900 MT
<b>Total Projected 2021 Production</b>		<b>266,500 MT</b>

Source: APG Prehearing Brief, Exhibit 11—corrected by Mr. Missiaen on April 18, 2017.



## Iranian Capability

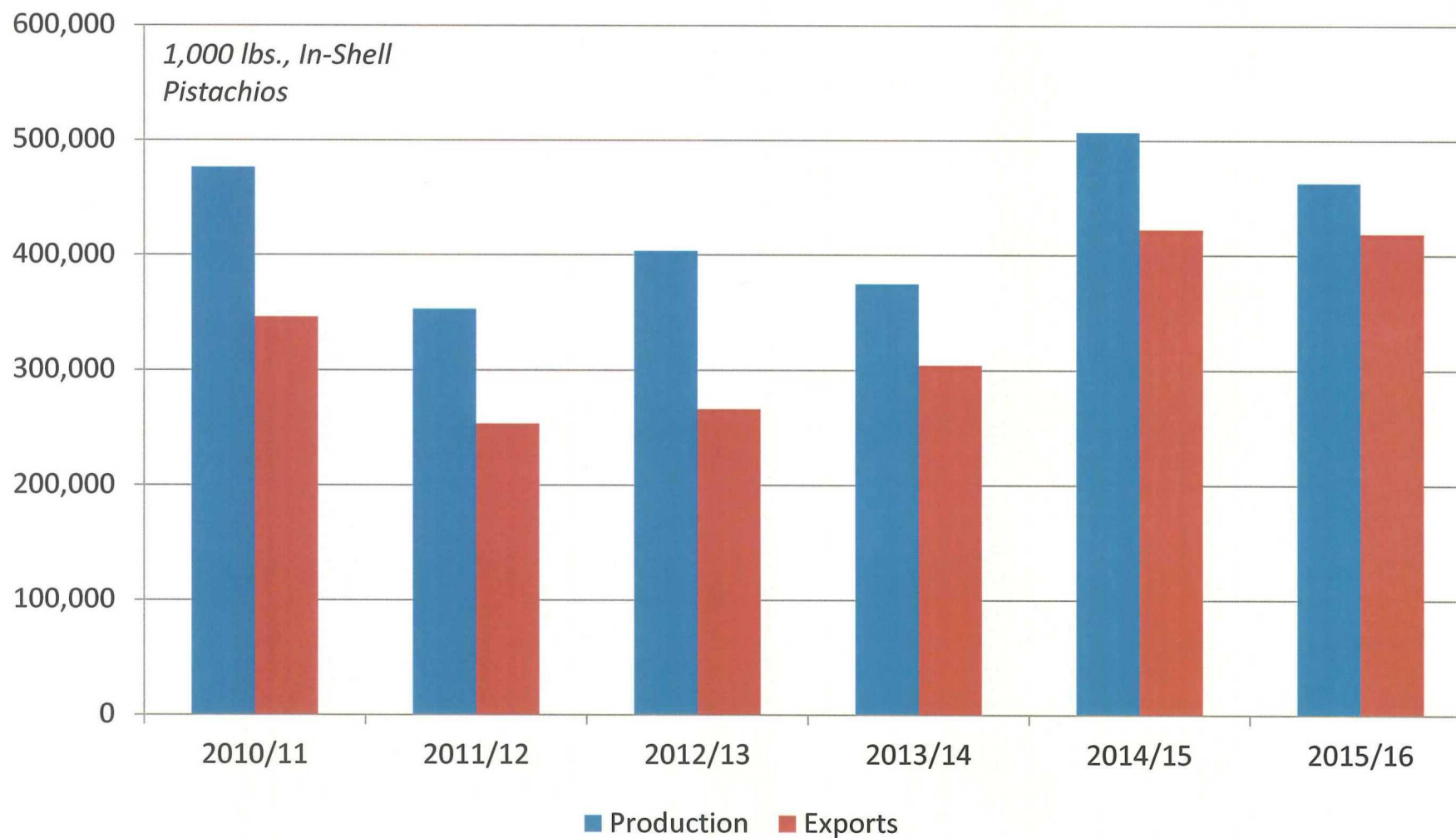
### Iran's Pistachio Production Will Increase



Source: Iranian Ministry of Agriculture data, included in *APG Prehearing Brief*, Exhibit 11.

## Iran's Exports

### Iran's Pistachio Industry Remains Export-Oriented

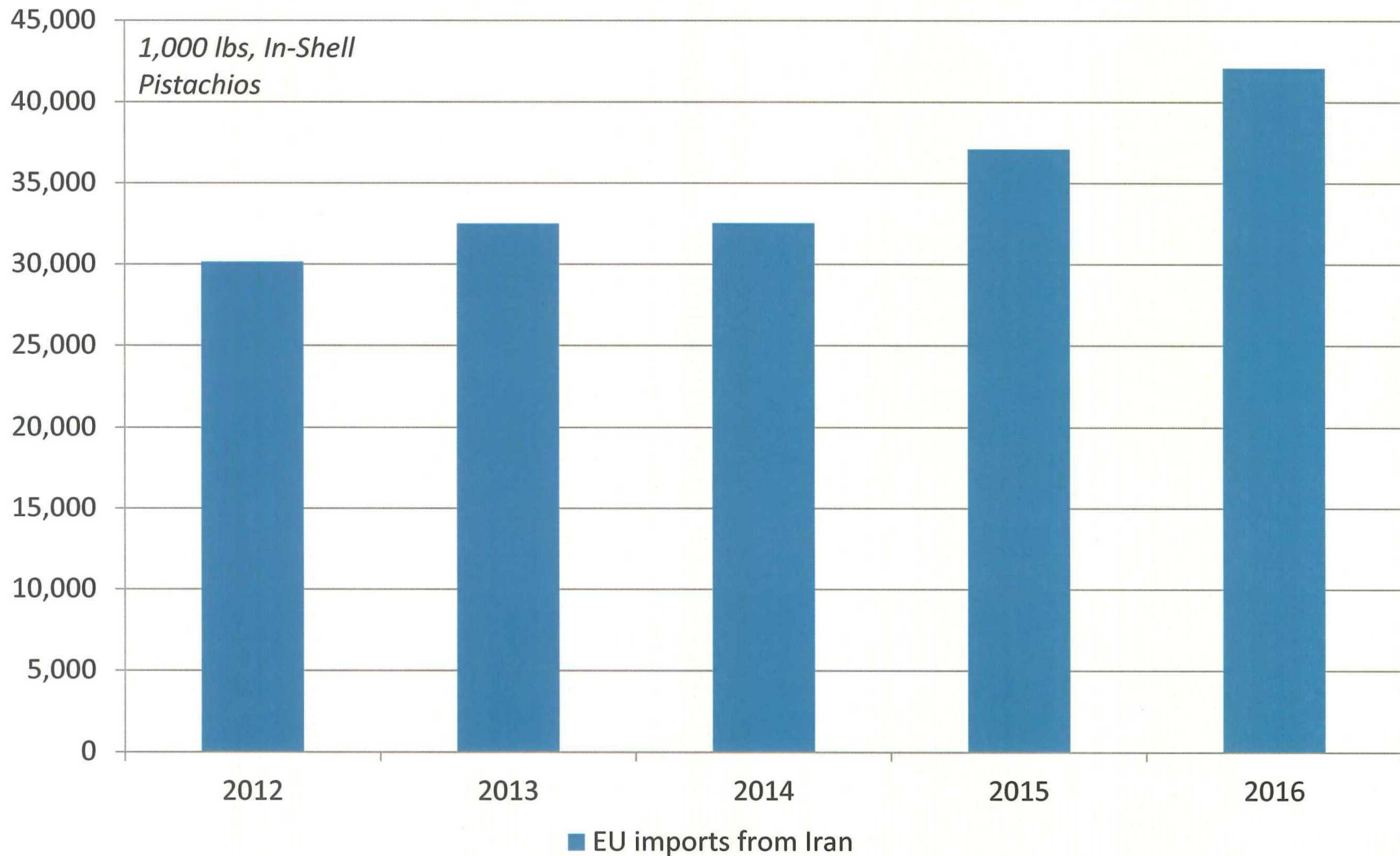


Source: U.S. Foreign Agricultural Service, *APG Prehearing Brief*, Exhibit 9.

Prepared by CapTrade 5

## Iran's Exports

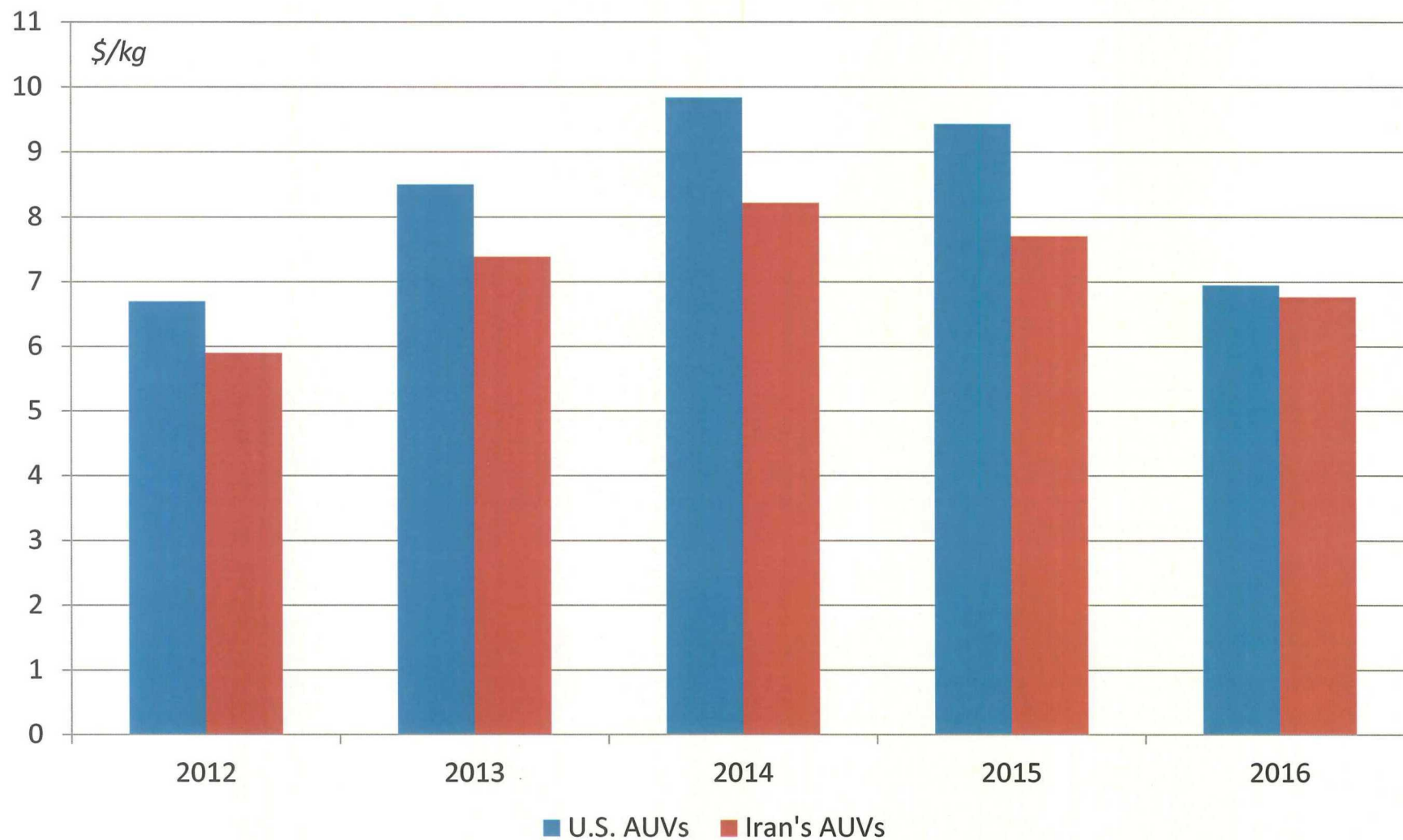
### Iran Exports to Countries or Regions with High-Quality and Regulatory Standards, Such as the EU



Source: APG Prehearing Brief, Exhibits 8 and 16.

## Iran Underselling

### Iran Undersells U.S. Producers in the Hong Kong Market

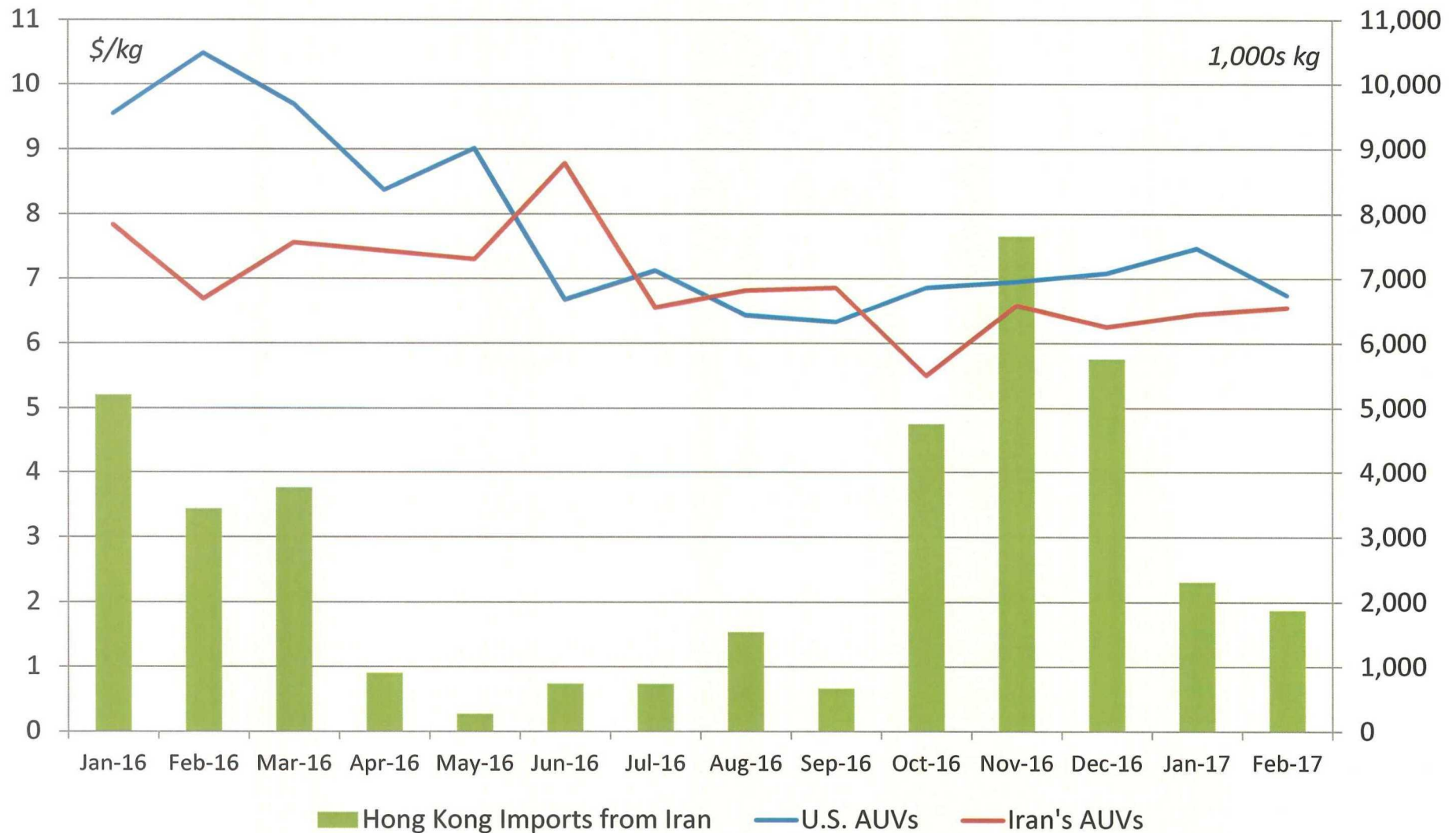


Source: APG Prehearing Brief, Exhibit 14.



## Iran Underselling

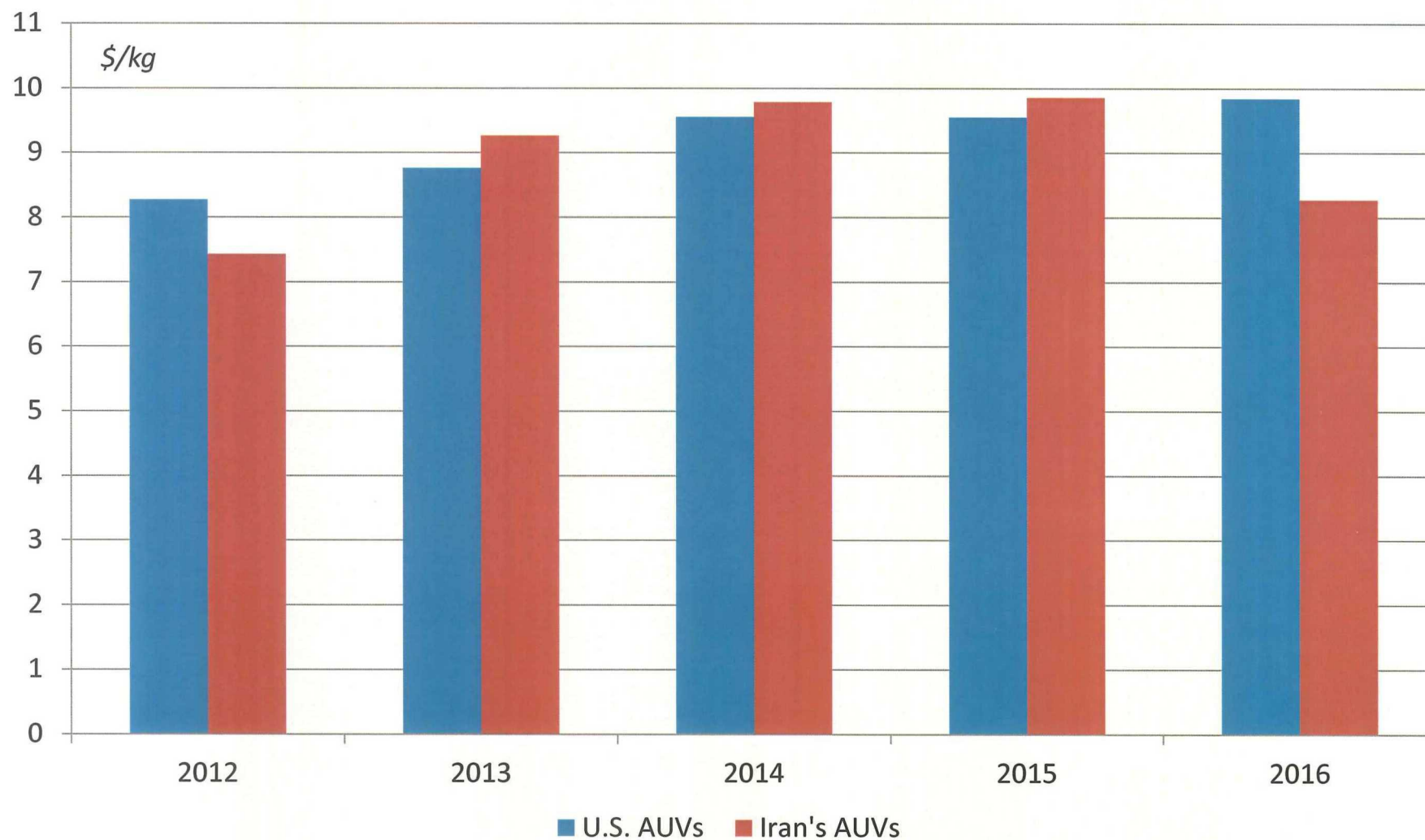
### Iran Undersells U.S. Producers in the Hong Kong Market



Source: APG Prehearing Brief, Exhibit 14 updated with January and February 2017 data.

## Iran Underselling

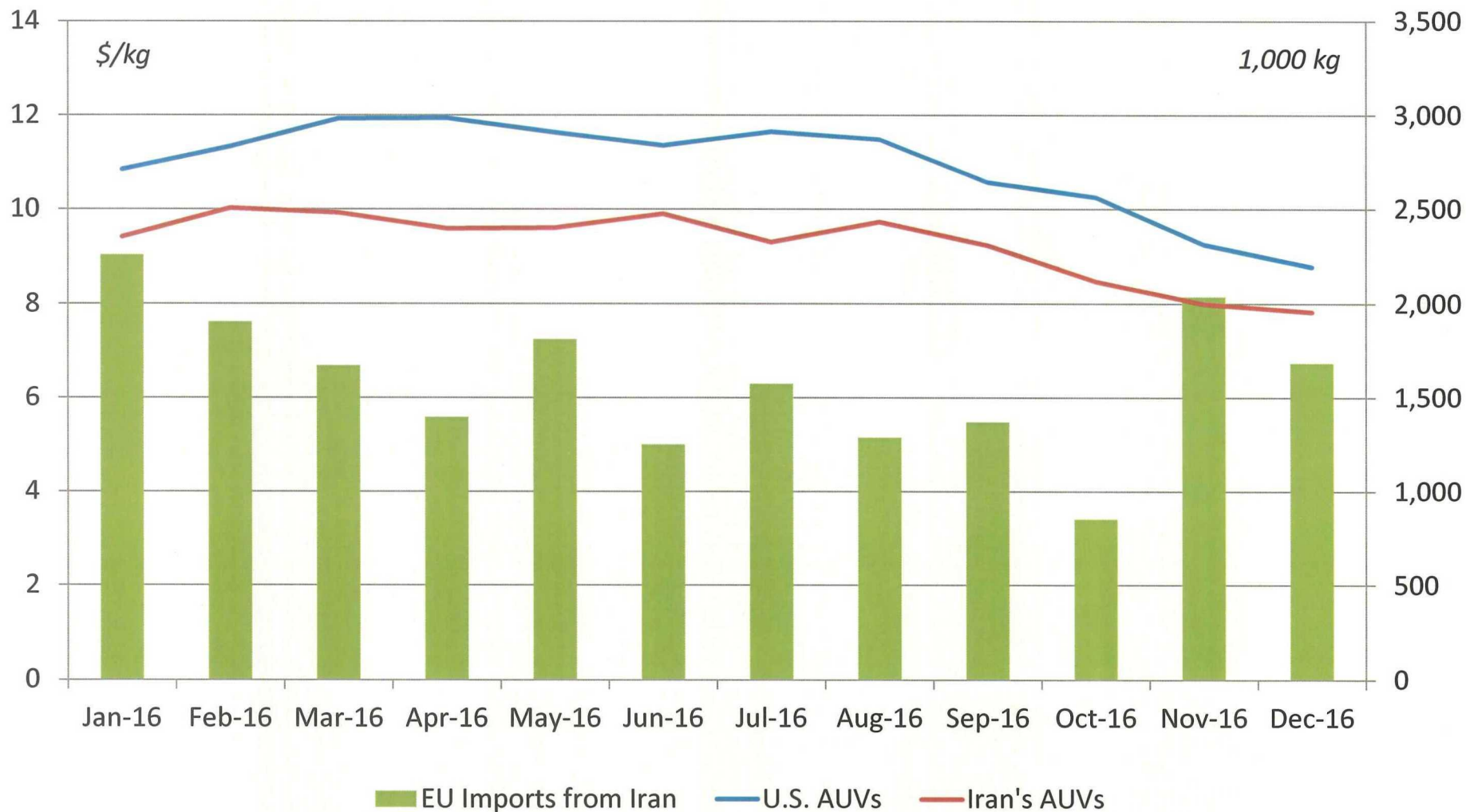
### Iran Undersells U.S. Producers in the EU Market



Source: Calculated from APG Prehearing Brief, Exhibit 15.

## Iran Underselling

### Iran Undersells U.S. Producers in the EU Market



Source: APG Prehearing Brief, Exhibit 16.

Prepared by CapTrade 10