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COMPOSITIONAL CHANGES IN IRANIAN TRADE BASKET OF LIVESTOCK SECTOR

MASSOUMEH N. ZADEH
RESEARCH SCHOLAR
NATIONAL DAIRY RESEARCH INSTITUTE
KARNAL

BITAN MONDAL
ASST. PROFESSOR
VISVA BHARATI
SANTINIKETAN

RAKA SAXENA
SR. SCIENTIST
NATIONAL CENTRE FOR AGRICULTURAL ECONOMICS AND POLICY RESEARCH
NEW DELHI

SMITA SIROHI
PR. SCIENTIST
NATIONAL DAIRY RESEARCH INSTITUTE
KARNAL

ABSTRACT

The export and import trends of livestock products and inputs in Iran show notable changes in the traded commodity profile. The changing import basket towards livestock inputs indicates development priority towards boosting domestic livestock production. On the export side, Iran mainly traded in livestock by-products like hides and skins, guts, bladders and stomachs of animal, but by quinquennium ending (QE) 2006, meat & edible offals and dairy products became more visible in export basket. The growth momentum in exports (83.22 percent increase in export value during QE2001 and QE2006), offer higher income opportunities for the livestock farmers and product manufactures in Iran, and the import growth in vaccines for veterinary purpose, animal feed, milking and dairy machines provide the necessary support for livestock development.

KEYWORDS

Exports, Imports, livestock products, livestock inputs.

1. INTRODUCTION

Livestock is an important national resource in Iran. More than half of the rural population depends at least in part on livestock for their livelihood. Livestock plays a key role in the lives of the rural poor, generating employment and often providing about 80% of their cash income. The livestock sector accounts for about 32% of the gross value of agricultural production (Kamalzadeh et al., 2008) and food from animal origin constitute a significant proportion of the Iranian diet. Although the dietary habits in Iran are predominantly non-vegetarian, yet dairy products are also consumed by the population. According to the 4th Five-year National Development Plan (2004-2009), the Iranian government, aims to increase the per capita consumption of dairy products from 95 kg in 2003 to 163 kg (Milkindustry.net, 2008). Together with rising demand of livestock products their supply has also increased, the livestock production index of Iran, that includes meat and milk from all sources, dairy products such as cheese, and eggs, honey, raw silk, wool, and hides and skins rose from 24 in 1961 (base 1999-00) to 142 in 2009.

Besides the domestic demand, the economic potential of any livelihood option is also conditioned by international demand. Hence, encouraging non-oil exports, particularly agri-exports have been made a development priority in Iran (Agence France Presse, 2010). Since 2001, several policy measures have been taken in this direction such as providing for export subsidy and export bonus. The latter policy was first introduced for the leather exporters and then extended to the exporters of agricultural products such as, raisins, eggs, chicken meat, tea, prawn, etc. In light of the empirical evidence from Iran that increasing trend in trade had positive impact on surplus value and growth of agricultural sector (Koshteh and Karbasi, 2003), realizing the untapped export potential of Iranian livestock products can have far reaching implications for livelihood security of the livestock producers and processors. Additionally, as the domestic supply of livestock products would continue to respond to the increasing demand, the derived demand for quality genetic materials, pharmaceuticals and feed materials shall further increase. Given the demand-supply gap of inputs (Nordblom and Shomo, 2005), Iran will continue to resort to large imports of livestock inputs required for enhancing livestock production in the country.

In this backdrop, this paper presents a detailed analysis of Iranian trade trends in livestock products and inputs that would have implications for the development of the livestock sector in the country and strengthening trade relations between Iran and other countries.

2. DATABASE

This study is based on Iranian trade data on value and volume of exports and imports of livestock products and inputs pertaining to years 1997-2006¹, taken from three sources viz; UN Comtrade Database (United Nations Commodity Trade Statistics Database), Statistics Center of Iran and Ministry of Jihad- e-Agriculture. The analysis was carried out for the overall period 1997-2006 and two sub-periods, i) 1997-2001, i.e., quinquennium ending 2001 (QE2001) and ii) 2002-2006, i.e. QE2006. The livestock products and inputs considered in the study are spread over 10 Chapters of Harmonised System (HS) of Trade nomenclature².

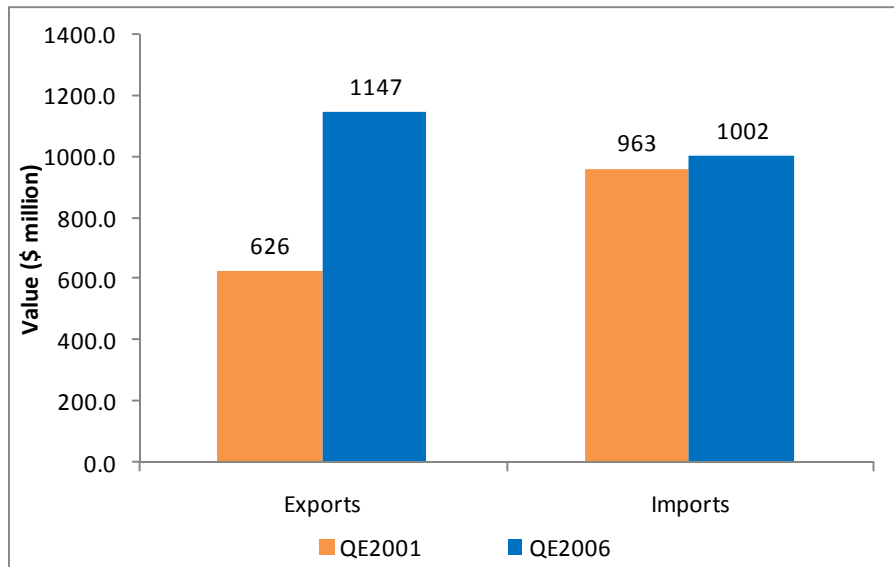
¹ The direct trade data for Iran was available only till 2006. For the later years, 2007-10, the mirror data was available but as the mirror data for the earlier years did not compare well with the corresponding direct data, the analysis was confined to 1997-2006

² The Harmonized Commodity Description and Coding System generally referred to as "Harmonized System" or simply "HS" is a multipurpose international product nomenclature developed by the World Customs Organization (WCO). The system is used by more than 177 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics. Moreover 98 per cent of the merchandise in international trade is classified in terms of the HS.

3. TRADE TRENDS

Total exports and imports: The total exports of livestock products and inputs, considered in the study was \$1147 million during QE2006, nearly 0.12 percent of the total Iranian export value of all commodities during this period. Between the first (QE2001) and second (QE2006) quinquennium, the total value of livestock exports registered a tremendous increase of 83.22 per cent (Fig. 1). The total imports of livestock products and inputs that accounted for 0.15 percent share in the Iranian import basket (QE2006) were largely stable during the study period, showing a marginal increase of 4.04 per cent from \$963 million in QE2001 to \$1002 million in QE2006. A faster growth of exports and slower increase in imports despite of rising demand, indicates a strong trend towards the development of domestic livestock sector in Iran. Also, it shows a welcome trend of rise in non-oil exports from Iran.

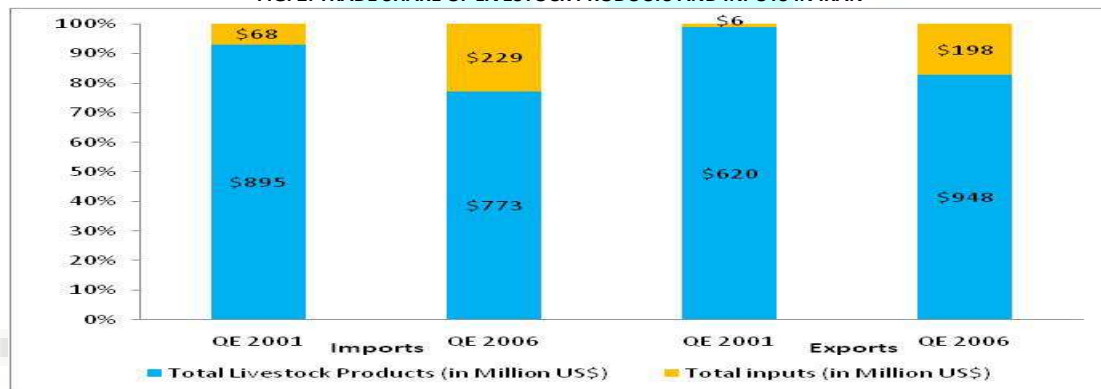
FIG. 1: EXPORT AND IMPORT VALUE OF IRANIAN LIVESTOCK SECTOR TRADE



Livestock Products and Inputs: The Iranian import and export basket comprises of both, livestock products and inputs, with predominant share of former. In QE2001, livestock products had 92.9 per cent share in total value of livestock imports, the remaining 7.1 per cent being attributable to livestock inputs (Fig. 2). In the later period, 2002-2006 (QE2006), the share of livestock products declined to 77.2 per cent while that of inputs increased to 22.8 per cent. The importance of livestock products in the Iranian imports declined not only in relation to livestock inputs, but also there was an absolute decline in the total value of imports of livestock products from \$894.73 million in QE2001 to \$773.21 million in QE2006, while the value of inputs increased from \$67.91 million to \$228.69 million during the same period. This indicates that the development priority in Iran is increasingly shifting towards developing the domestic livestock sector through higher imports of livestock inputs rather than livestock products.

Interestingly, in relative terms, the export basket showed similar pattern of change over time. The livestock products occupied lions share in the total exports (99 per cent) and the share of livestock inputs was negligible (1 per cent) in QE2001. However, the share of livestock inputs increased rapidly to 17.3 per cent in QE2006 (Fig. 2). But unlike in case of imports, there was an increase in total value of exports of both, products and inputs value from \$ 619.53 million (QE2001) to \$ 948.50 million (QE2006) and from \$6.26 million (QE2001) to \$198.48 million (QE2006), respectively.

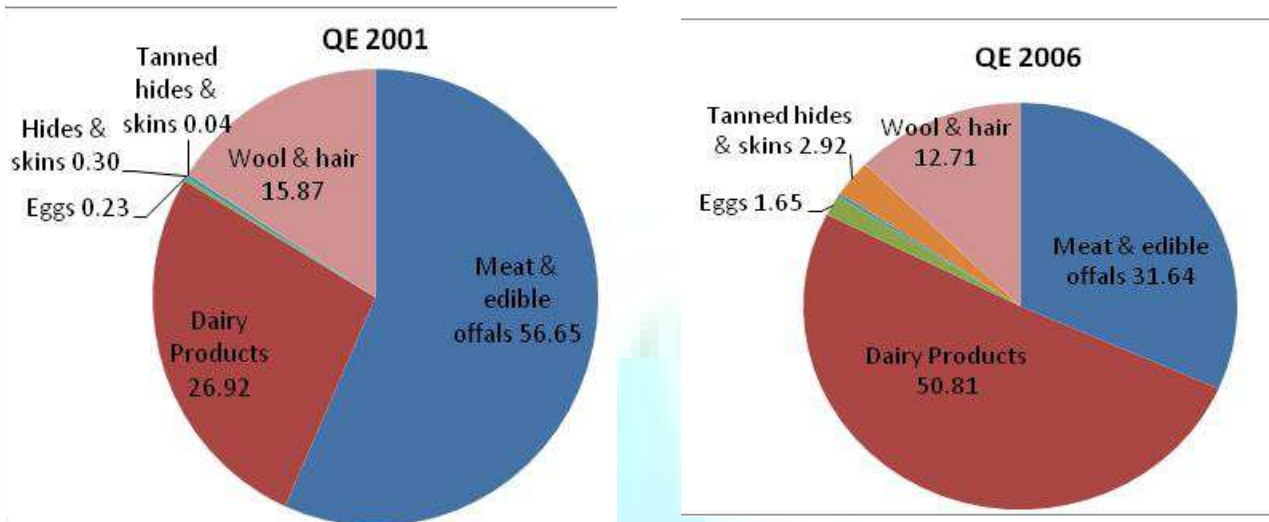
FIG. 2: TRADE SHARE OF LIVESTOCK PRODUCTS AND INPUTS IN IRAN



Import Basket of Livestock Products: The livestock products that appear in the trade basket have been grouped into 9 broad categories, viz.: meat & edible offals, meat preparations, dairy products, eggs, wool & hair, hides & skins, tanned hides & skins, prepared leather and other livestock products (e.g., guts, bladders and stomachs of animals).

Meat & edible offals and dairy products occupied more than 82 per cent share in the total livestock product imports in both the time-periods (Fig. 3). Over the period of time, there was a notable change in the share of these two products. In QE2006, the dairy products replaced meat & edible offals as the most important import product group, as the share of later reduced drastically to 31.64 per cent in QE2006 from 56.65 percent in QE2001, while that of dairy products almost doubled.

FIG. 3: COMPOSITION OF LIVESTOCK PRODUCT IMPORTS



The share of meat and edible offals in the import basket declined as the value of imports of this product group decreased by about 52% in QE2006 as compared to QE2001 (Table 1). Nevertheless, the domestic production of meat (lamb, chicken, beef and goat) of over 2 million tonnes annually is not sufficient to meet domestic demand and therefore, Iran has to import about 100,000-150,000 tons of meat and live animals every year (Jadoon, 2010). The imports of various types of *Halal* meat are usually regulated by government agencies and/or industry associations/co-operatives. In FY 2007-08, the country had to import nearly 100,000 tons of meat worth \$238 million, in order to reduce the local prices. The Brazil Livestock and Products Semi-annual Report (2010) also reported Iranian imports of meat from Brazil, 81,202 metric tons in 2008 and 88,996 metric tons in 2009, primarily due to insufficient domestic meat production to meet the demand.

TABLE 1: CHANGES IN LEVEL OF IMPORT OF LIVESTOCK PRODUCTS

| Commodity | Import Values (million \$) QE2006 | % change in QE2006 over QE2001 |
|--------------------------|-----------------------------------|--------------------------------|
| Meat & Edible Offals | 244.60 | -51.74 |
| Dairy products | 392.85 | 63.10 |
| Eggs | 12.77 | 522.39 |
| Meat Preparations | Neg. | @ |
| Hides & Skins | 2.07 | -22.61 |
| Tanned hides & Skins | 22.58 | @ |
| Prepared leather | Neg. | @ |
| Wool & Hair | 98.27 | -30.77 |
| Other Livestock Products | Nil | @ |

Notes: @ Not computed as either nil or negligible imports made in QE2001
 Neg. < \$0.05 million

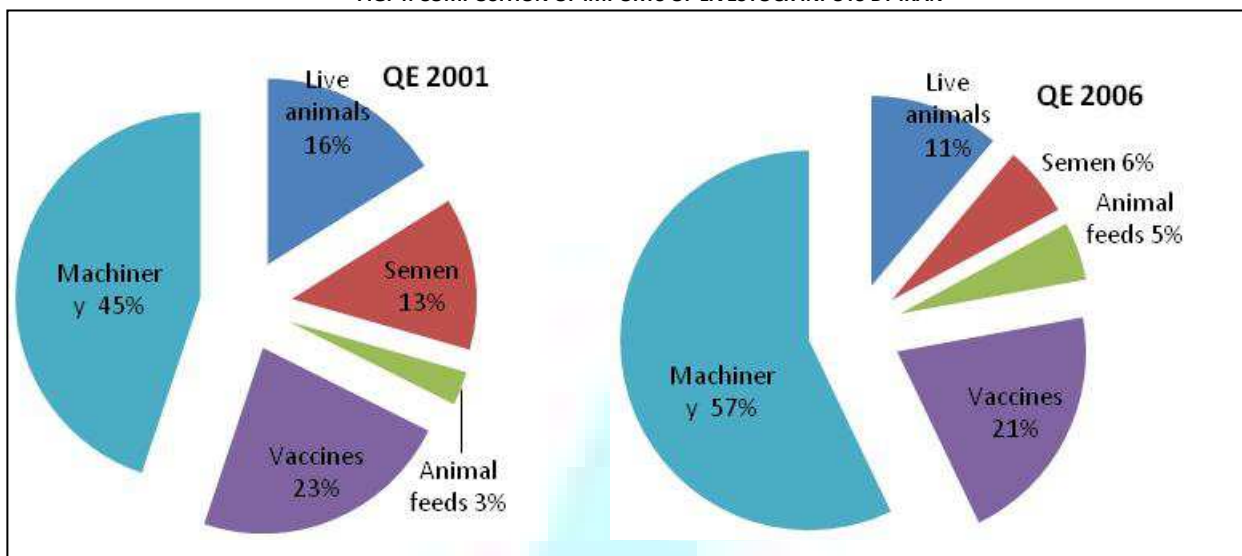
The rising demand of dairy products and eggs in Iran was clearly reflected in the high and positive percent change in QE2006 vis a vis QE2001. Dairy products had registered firm growth in import value, increasing continuously from \$50.63 million in 2002 to \$126.45 million in 2005. Although, during 2005-2006, the imports declined in value terms by more than 50%, by and large, the observed trends indicate rise in import demand of dairy products in Iran. The initiative of Iranian Government to facilitate public access to milk and dairy products led to rapid increase in imports of these products. In the 4th Five Year National Development Plan (2004-2009), the Iranian Government aimed at increasing the annual consumption of dairy products to 163 kg, around 72 per cent higher than the consumption level of 95 kg in 2003. Higher production targets were set for meeting these consumption levels, but the immediate solution was to meet the demand through imports.

Unlike dairy products, the import demand of eggs has been highly volatile during 2002-2006, increasing from \$2.03 million in 2002 to \$5.01 million in 2003, declining to \$1.28 in 2004, rising once again to \$4.18 million in the subsequent year to fall once again to nearly \$0.27 million in 2006. Similarly, the imports of tanned hides and skins were very volatile during 2002-2006 although their absolute value in this period was much higher than in earlier period of 1996-2001.

Import Basket of Livestock Inputs

The imports of livestock inputs are confined to broadly five types of inputs in the following order of importance; machinery, vaccines, live animals, semen and animal feeds (Fig. 4).

FIG. 4: COMPOSITION OF IMPORTS OF LIVESTOCK INPUTS BY IRAN



Iran was importing milking machinery, dairy machinery and machinery for preparing animal feeding stuffs. There was a more rapid growth in the import of former (milking machines & dairy machinery) than the later, since Iranian Government has been encouraging private investment in dairy sector, the machinery was imported to facilitate the establishment of dairy processing units. Next to machinery, vaccines for veterinary medicine were the important item of input import. The inter-quinquennium period showed more than double increase in the import value.

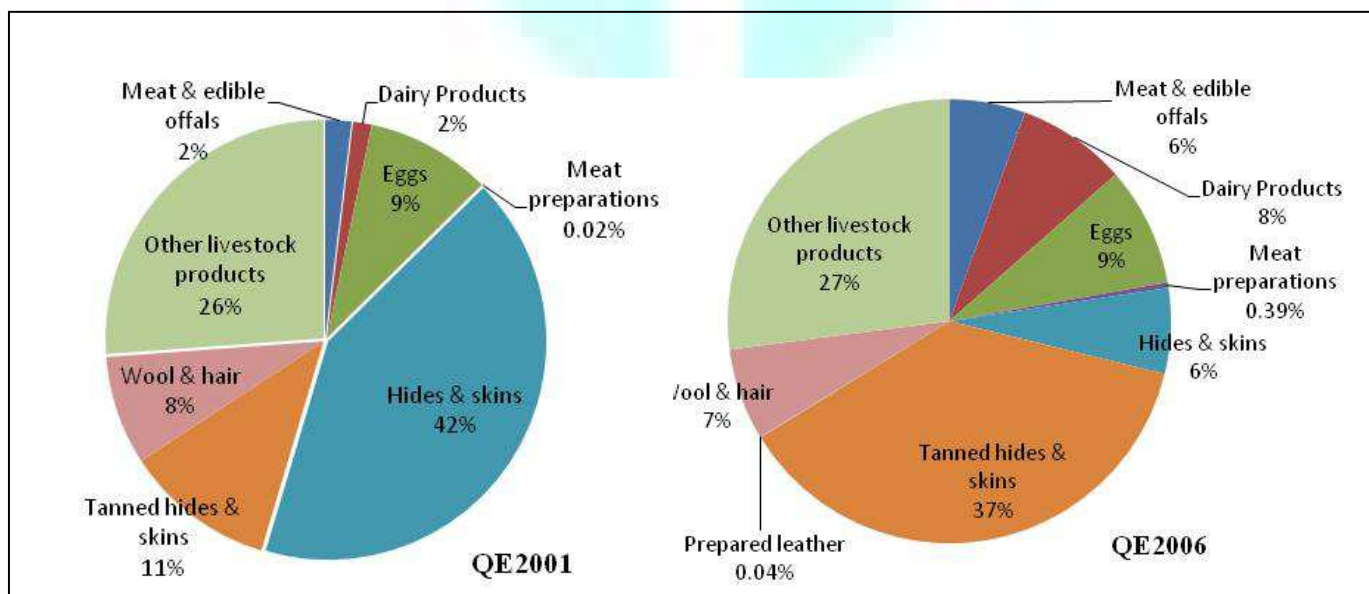
Iran had also imported live animals worth \$25.41 million in QE 2006, up from import value of \$10.91 million in QE 2001. Among the live animals, the import of bovine animals was quite small, except in 2006 when their trade value exceeded \$1.6 million. There was a good demand for live cattle imports (mainly dairy cattle) in Iran in early 1990s and Canada was one of the leading exporters to Iran at the time, but the imports of live cattle were banned by the Government later. The droughts of 1998-2001 forced a number of dairy cattle farmers to send their cattle to the slaughter houses, which caused a shortage of dairy cattle in the country. Hence, the Iranian Government’s plan for increasing local milk production from the 6.5 million tons in 2008 to 12 million tons within the next 8 years, led to lifting of this ban (Zanganeh, 2008). The major import of live animals was that of live poultry in Iran. In order to increase the production potential of its dairy animals, large doses of semen amounting to over \$13.5 million were imported by Iran during 2002-2006. In the earlier period (1997-2001) also, bovine semen of about \$9 million was imported.

The information on two types of items used for animal feed was looked into; vegetable materials etc and prepared animal feeds. Iran’s imports second type of feed and like other inputs, the import demand of this commodity also showed very sharp increase in QE2006 over QE2001. The intra- quinquennium growth rates have also been worked out for the inputs. Kamalzadeh et al. (2008) also substantiated that due to shortages of feed in Iran, about 47% of the required feed ingredients for the poultry sector were imported.

Export Basket of Livestock Products

After examining the trends in imports of livestock products and inputs, this section analyses the composition of exports and export trends of livestock products and inputs. The Iranian exports of livestock products (Fig.5) were mainly of by-products like hides and skins, tanned and raw (43% value share in QE2006) and other livestock products comprising guts, bladders and stomachs of animals (27% share). These products together accounted for about 80% value share of exports in QE2001 as well. Wool & hair also had a sizeable share (7.8%) in Iranian exports of livestock products.

FIG. 5: COMPOSITION OF LIVESTOCK PRODUCT EXPORTS



Other than these by-products, Iran also exported eggs worth \$ 82.31 million during 2002-2006 (Table 2). The share of eggs in the export basket has stagnated at about 9% during the study period. However, meat & edible offals and dairy products became more visible in the export basket in the latter half of the study period. By and large, as in case of import of livestock products, a trend towards diversification of exports emerged in the QE2006 as compared to QE2001.

Changes in level of Exports

During the two sub-periods, 1997-2001 and 2002-2006, except for exports of raw hides and skins, the export value of the livestock products had increased in the later period. The intra-quinquennium growth rates had also been positive for the commodity groups indicating that in consonance with the opening-up policy of Iranian economy, the livestock products increasingly made in-roads in the markets of other nations.

TABLE 2: EXPORTS OF LIVESTOCK PRODUCTS

| Commodity | Export Values (million \$) QE2006 | % change in QE2006 over QE2001 | Compound Annual Growth Rate (%) | |
|--------------------------|-----------------------------------|--------------------------------|---------------------------------|--------|
| | | | QE2001 | QE2006 |
| Meat & Edible Offals | 52.74 | 339.6 | 22.45 | 27.26 |
| Dairy products | 75.52 | 778.4 | 144.31 | 96.62 |
| Eggs | 82.31 | 43.7 | 153.86 | 21.84 |
| Meat Preparations | 3.72 | @ | 5.05 | 92.18 |
| Hides & Skins | 58.76 | -77.4 | -14.62 | -33.77 |
| Tanned hides & Skins | 355.33 | 413.5 | 83.66 | 23.44 |
| Prepared leather | 0.41 | @ | # | 173.43 |
| Wool & Hair | 63.27 | 26.8 | 28.82 | 12.57 |
| Other Livestock Products | 256.40 | 58.3 | -5.94 | 27.42 |

Notes: @ Not calculated as value in QE2001 was nil or negligible

insufficient information for computing cagr

Export Basket of Livestock Inputs

The Iranian exports were confined to three inputs: live animals, animal feeds and machinery (Table 3). Among the live animals, the exports were principally that of sheep and poultry. Bovine animals worth \$1.83 million in export value were exported in the recent quinquennium. Interestingly, for two input items viz. animal feed preparations and dairy machinery, the export value in QE2006 ranges from \$3.36 million to \$5.56 million, respectively. It may be recalled that Iran relies heavily on the imports for catering to the domestic demand of these inputs. However, growth in exports of these items indicates that part of the import demand was for the purpose of re-exports.

TABLE 3: IRANIAN EXPORTS OF LIVESTOCK INPUTS

| Commodity | Export Values (million \$) | | Compound Annual Growth Rate (%) | |
|-----------------------------|----------------------------|--------|---------------------------------|--------|
| | QE2001 | QE2006 | QE2001 | QE2006 |
| Live animals | 4.66 | 189.53 | 25.35 | 138.52 |
| Animal feeds | 1.51 | 3.36 | 700.46* | -29.36 |
| Vaccines for veterinary use | 0.01 | 0.02 | # | # |
| Machinery | 0.08 | 5.56 | -19.45 | 617.40 |

Notes: *pertains to 1998-2001, # insufficient information for computing cagr

Trade Balance

The net trade balance, that is, the difference in export and import value shows that considering the entire study period from 1997-2006, Iran was net importer of livestock products and inputs (Fig. 6). However, in QE 2006, the livestock sector trade registered a positive net trade balance, i.e., the export value exceeded the import value by \$ 145.1 million (Table 4). As per the trends in second half of decade period from 1997 to 2006, Iran was net importer of meat & edible offals, dairy product, wool & hair, semen, animal feeds, vaccines & machines used for livestock sector. For the other commodities, the country was a net exporter; the trade balance was particularly favorable for tanned hides and skins, other livestock products and live animals.

FIG. 6: NET TRADE BALANCE OF IRANIAN LIVESTOCK SECTOR: 1997-2006

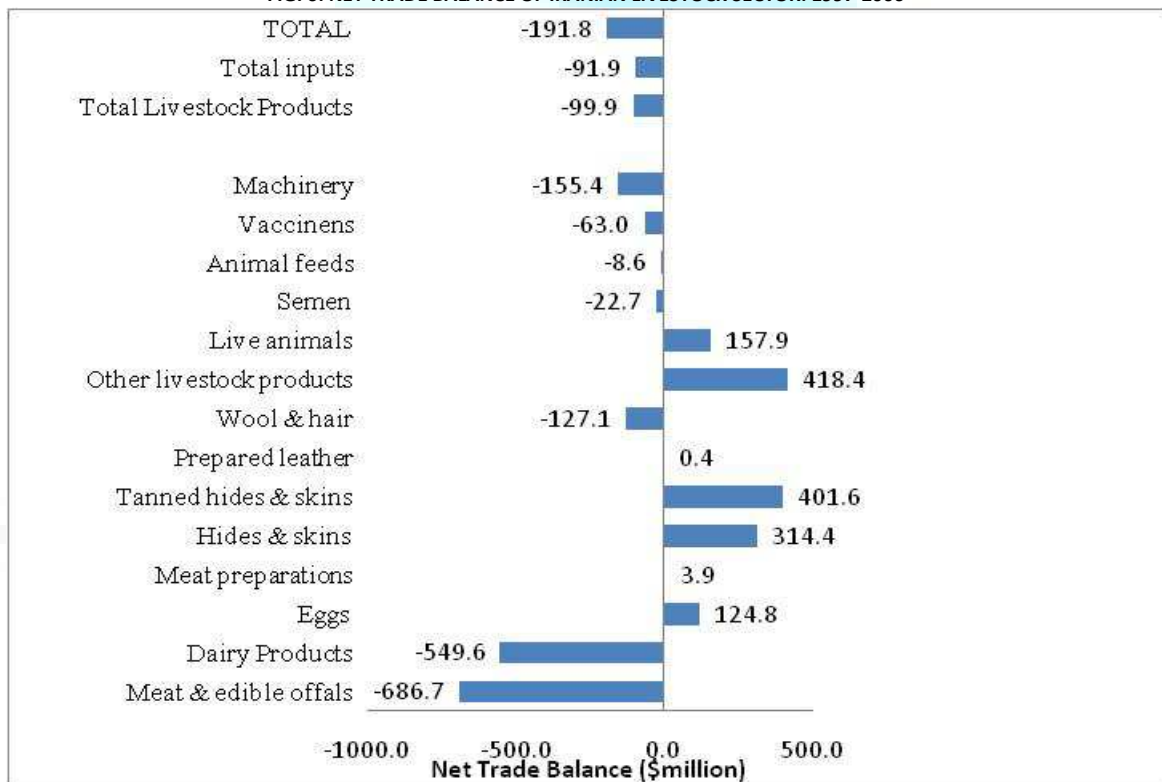


TABLE 4: NET TRADE BALANCE OF IRANIAN LIVESTOCK SECTOR: QE2001 AND QE2006

| Commodity Groups | Net Trade Balance(\$ million) | |
|---------------------------------|-------------------------------|--------------|
| | QE2001 | QE2006 |
| Meat & edible offals | -494.8 | -191.9 |
| Dairy Products | -232.3 | -317.3 |
| Eggs | 55.2 | 69.5 |
| Meat preparations | 0.1 | 3.7 |
| Hides & skins | 257.7 | 56.7 |
| Tanned hides & skins | 68.9 | 332.7 |
| Prepared leather | 0.0 | 0.4 |
| Wool & hair | -92.0 | -35.0 |
| Other livestock products | 162.0 | 256.4 |
| Live animals | -6.3 | 164.1 |
| Semen | -9.1 | -13.7 |
| Animal feeds | -0.5 | -8.1 |
| Vaccines | -15.4 | -47.5 |
| Machinery | -30.4 | -125.0 |
| Total Livestock Products | -275.2 | 175.3 |
| Total inputs | -61.6 | -30.2 |
| TOTAL | -336.8 | 145.1 |

4. CONCLUSIONS

In both, the import and export basket, the share of livestock products was more predominant than livestock inputs but overtime the relative importance of livestock inputs increased. Among various livestock products, dairy products were most important item of import followed by meat and edible offal, wool and hair, tanned hides & skins, eggs and hides & skins. The composition of livestock inputs import was confined to machinery, vaccine, live animal, semen & animal feed in order of importance. Iran exported mainly livestock by-products, such as, tanned and raw hides & skins, guts, bladders and stomachs of animals and wool & hair. Live animals, principally sheep and poultry were also exported by Iran. Iran was net importer of meat & edible offals, dairy product, wool & hair, semen, animal feeds, vaccines & machines used for livestock sector. For the other commodities, the country was a net exporter; the trade balance was particularly favorable for tanned hides and skins, other livestock products and live animals.

Though the present level of livestock trade between the India and Iran is low, there is good potential of enhancing bilateral trade between India and Iran for a number of livestock products. There is possibility of enhancing trade in livestock products between Iran and India. Initiatives like, increasing the exportable surplus, improving transportation infrastructure, and regional trade agreement with West Asian countries could be few important options for India for strengthening its trade ties with Iran for the livestock sector.

5. ACKNOWLEDGEMENT

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