This deck shows Afghan founders which businesses to start, who to contact first to test each idea cheaply, and how to stay ahead once other firms start to copy them.

“Afghanistan Net Export Value Creation” showed where Afghanistan can earn more from trade. This deck turns those findings into businesses a founder can start.

What each business page answers

1. The opportunity: what you sell, to whom, and how big the market is.
2. Customers: who pays and how you reach them.
3. Economics: prices, costs, and where the profit is.
4. What it takes to start: equipment, money, skills, time to first sales.
5. Competition: who already does this.
6. Strategy: how to stay ahead (middle panel).
7. Risks: and how to manage them.

How to stay ahead

First, reach export standard. In Afghanistan, simply working to international quality puts you ahead of most competitors, often for years.
Then choose a position. Certain products, a customer need, or customers others cannot reach.
Make trade-offs. Decide what you will NOT do, so copying you is costly.
Build activities that fit. A rival must copy the whole system, not one machine.
Copying helps Afghanistan. When others follow a pioneer, the industry grows; each page shows how the first mover stays ahead long enough to profit.

Based on Michael E. Porter, “What Is Strategy?” (HBR, 1996).

What is in this deck

SECTORS

1. **Dried fruit & nuts** — 4 business ideas
2. **Food milling & processing** — 4 business ideas
3. **Medicinal plants & spices** — 3 business ideas
4. **Carpets & textiles** — 3 business ideas
5. **Building materials** — 3 business ideas

BIG BETS

A. **Energy** — big bet
B. **Transit & trade hub** — big bet, incl. cold storage
C. **People as exports** — big bet

Sectors chosen by the selection test (slide 6). Market figures come from “Afghanistan Net Export Value Creation” (Harvard Growth Lab Atlas of Economic Complexity; CEPII BACI 2024). Costs marked “indicative” are estimates for founders to check with suppliers.

We filtered every Afghan export product down to seventeen businesses in five sectors, plus three big bets on energy, transit, and people that make all of them stronger.

HOW WE GOT HERE

1. **Start from the first deck** — "Afghanistan Net Export Value Creation" scored every 6-digit product on market size, growth, value per kg, complexity, current strength, and imports we could replace.
2. **Pick five sectors** — Score each sector on five tests: size, already competitive, close to us, founder-feasible, local raw material. Plastics failed and was dropped.
3. **Turn products into businesses** — Keep products a founder can start with modest money; check when processing raw material pays (Hausmann); give each a way to stay ahead (Porter).
4. **Add three big bets** — Power, transport, and skills hold back every sector. Built on the UNDP Private Sector Mapping (2025), Harvard Growth Lab, and Exporters Without Borders.

#	Sector or big bet	Businesses to start	Horizon
1	**Dried fruit & nuts**	Grading & packing house · Testing lab · Export brand · Pine nut processing	Short
2	**Food milling & processing**	Flour mill · Oil pressing & feed · Packaged foods & packaging · Fruit & veg processing	Short–medium
3	**Medicinal plants & spices**	Spice cleaning & grading · Extracts & essential oils · Saffron brand	Short–medium
4	**Carpets & textiles**	Washing & finishing hub · Direct carpet brand · Tufted carpets & bedding	Short–medium
5	**Building materials**	Marble & stone processing · Insulated windows · Radiators & castings	Medium
A	**Energy**	Factory solar "power as a service" · Solar cold rooms · Mini-grids · Installer academy	Medium–long
B	**Transit & trade hub**	Cold storage & packhouse · Refrigerated trucking · Forwarding & customs · Bonded warehouses	Medium–long
C	**People as exports**	Placement agency · Returnee skills bank · Remote-services studio · Diaspora investor group	Short–long

Product selection from "Afghanistan Net Export Value Creation" (Harvard Growth Lab Atlas; CEPII BACI 2024). Sector tests on slide 6; method on slides 3–5.

How the pieces fit

Energy powers the sectors: mills, cold rooms, finishing plants, and foundries all need reliable power.
Transit moves the goods: cold storage and new routes carry fruit, stone, carpets, and spices to buyers.
People bring the know-how: diaspora founders, returnee skills, and diaspora money run through every business.
Shared services cut costs: the testing lab, packaging, and export desk serve every exporter.
Learning adds up: each pilot shows the next missing piece.

Method · How business ideas are chosen

Each idea starts from a product chosen in “Afghanistan Net Export Value Creation” for strong demand, growth, and good prices, and must be small enough for one founder to start.

Step 1 · Start from a product that passed one of these filters

1A — **Existing exports, new buyers:** Afghanistan already competitive (RCA ≥ 10); top-5 buyers outside India and Pakistan import over $50M; their imports are growing; not a low price per kg.

1B — **Existing exports, more value:** Exports over $2M where Afghanistan is paid less than others, or buyers resell for much more.

1C — **New exports:** Close to what Afghan firms already make; world market over $1B, growing, at least $2/kg.

2 — **Buy less from abroad:** Large imports that Afghan firms could make (rated High or Medium); machinery, medicines, fuel, and crops Afghanistan cannot grow removed.

Step 2 · Add one test of our own

Founder-feasible: can start for about $1M or less, sell within 24 months, and use inputs found in Afghanistan.

Step 3 · Group into businesses

Products that need the same work (buying, processing, selling) become one business.

Example: dried fruit & nuts

Product	6-digit code	Page	Why it passed	Becomes idea
Pistachios	080250	1A	$1,725M buyers	**3 Brand**
Almonds	080212	1A	$1,400M buyers	**1 Packing · 3 Brand**
Raisins	080620	1A, 1B	$587M; $41M lost	**1 Packing house**
Pine nuts	080290	1A	$587M buyers	**4 Pine nuts**
Walnuts	080232	1A	$533M buyers	**1 Packing house**
Figs	080420	1A	$258M buyers	**1 Packing · 3 Brand**
Dried apricots	081310	1A, 1B	$172M; $72M lost	**1 Packing · 3 Brand**

What is a 6-digit code? The product code customs offices use worldwide. 08 = fruit & nuts; 0802 = other nuts; 080250 = pistachios. It ties every idea to one real product.

Result: 4 ideas. Packing house (five products, same work) · testing lab · export brand · pine nut processing. Each sector gets 3 to 5 ideas.

Filters and figures from “Afghanistan Net Export Value Creation”: CEPII BACI v202601 (2024) and Harvard Growth Lab Atlas (2024). RCA (revealed comparative advantage) above 1 = already competitive. A few products marked “added” on sector pages are already competitive and flagged by the UNDP mapping.

Processing a raw material at home only pays in two cases; we tested every raw material behind our five sectors, starting with food, where all pass except raw hing.

Why it matters

Raw materials cost about the same everywhere, plus transport, and any factory abroad can buy them. Owning them is rarely an advantage by itself.

Case 1

The raw material is most of the cost of the finished good.

Case 2

The finished good is cheaper to ship than the raw material (logs cut into planks; fruit dried).

If neither

Export the raw material as it is, and put effort into skills instead.

Sector	Raw material → finished good	Case 1: raw material is most of the cost?	Case 2: cheaper to ship once processed?	Verdict
Dried fruit & nuts	**Grapes, apricots → raisins, dried apricots**	Yes: fruit is most of the cost	Yes: drying removes most of the weight (about 4 kg of grapes make 1 kg of raisins)	**Process: dry, sort, grade, and pack here**
	Pine nuts, almonds in shell → kernels	Yes	Yes: the shells stay home	**Process: crack and grade here**
Food processing	**Fresh fruit and tomatoes → pulp, paste, concentrate**	Yes	Yes: paste and concentrate are several times lighter	**Split: sell the best fruit fresh when a route is open; process second-grade and surplus fruit**
	Wheat → flour	Yes: wheat is most of the cost of flour	Partly: the bran stays home as animal feed	**Process, for the home market ($640M of flour imports)**
	Cottonseed, sunflower → cooking oil and oilcake	Yes	Partly: the oilcake is sold at home as feed	**Process, for the home market**
Medicinal plants & spices	**Wild herbs, roses → essential oils, extracts**	Yes: the plant is the main cost	Yes: distilling removes over 95% of the weight	**Process: distill and extract here**
	Cumin → cleaned, sterilized cumin	Yes	Partly: dirt and stones stay home	**Process: clean, sterilize, and grade**
	Saffron → retail packs	Yes: saffron is almost all the cost	Same weight either way	**Pack and brand here**
	Raw hing resin → compounded hing	Yes, but the buyer adds cheap flour and gum	No: compounding makes it heavier	**Export raw, graded by type; India compounds near its shoppers**

Rule: Ricardo Hausmann, Harvard Growth Lab, on when adding value to raw materials pays. Import figure: CEPII BACI v202601 (2024). Weight ratios are typical industry yields; founders should confirm them with suppliers.

In textiles and building materials, the test says spin no cotton yet, cut and polish stone at home, and back carpets for the skill of their weavers, not for their wool.

Sector	Raw material → finished good	Case 1: raw material is most of the cost?	Case 2: cheaper to ship once processed?	Verdict
Carpets & textiles	**Wool → hand-knotted carpets**	No: weaving labor, not wool, is most of the cost	No	**Carpets win on skill, not on wool; the carpet ideas rest on weaving know-how**
	Seed cotton → cotton lint (ginning)	Yes	Yes: about two-thirds of the weight is seed, which goes to oil mills	**Gin here, as Afghanistan already does**
	Cotton lint → yarn and fabric	Partly: cotton is around half the cost of yarn	No: yarn weighs about the same as lint	**Export lint as it is for now; spinning needs big plants and steady power (revisit after big bet A)**
	Cotton → wadding, quilts, bedding	Yes	No: wadding is bulky, so it is made near buyers	**Make for the home market only (idea 3), not for export**
Building materials	**Marble blocks → slabs and tiles**	Partly: the block is a large share	Yes: 30–50% of a block is cut away, and the waste stays home	**Process: cut and polish here; stop selling rough blocks**
	Scrap iron → radiators, castings	Partly	Yes for the home market: scrap is bulky and cheap to sell abroad	**Process, for the home market**
	Limestone → cement	No: fuel and power are most of the cost	No: cement is heavy and sold close by	**Not now: needs a large plant and cheap power**

Export as it is: raw hing (graded) and cotton lint. Not now: cement. For wool, the test does not apply: carpets are a skill business.

What the test does not cover: testing labs, packing services, and export brands. They add skills, not processing, and are judged on whether many exporters will use them.

Rule: Ricardo Hausmann, Harvard Growth Lab. Ginning, sawing and spinning ratios are typical industry figures. Cotton lint and spinning feasibility: “Afghanistan Net Export Value Creation” (cotton yarn 5205, rated not founder-feasible).

Using the same measures, five sectors are chosen for detailed study; plastics is dropped because Afghanistan lacks the skills and the raw material.

The six sectors from "Afghanistan Net Export Value Creation" are scored with the same measures that built them, plus founder feasibility. Each test gives 0, 1, or 2 points; the five highest totals get a deep-dive.

Test	How points are given	Dried fruit & nuts	Food milling & processing	Medicinal plants & spices	Carpets & textiles	Building materials	Plastics, packaging & household
1 Size of opportunity Buyer markets (1A) + prizes (1B) + import bills rated High/Medium (2), from "Afghanistan Net Export Value Creation"	2 = $1B+ · 1 = $0.2–1B · 0 = under $0.2B	$5.4B **2 points**	$1.4B **2 points**	$1.8B **2 points**	$0.4B **1 point**	$0.1B **0 points**	$0.04B **0 points**
2 Already competitive Products Afghanistan already exports competitively (RCA ≥ 1)	2 = 5+ products · 1 = 1–4 · 0 = none	5 **2 points**	0 **0 points**	6 **2 points**	9 **2 points**	5 **2 points**	1* **1 point**
3 Close to know-how How near the sector is to what Afghan firms already make (Atlas distance; lower = nearer)	2 = 0.92 or less · 1 = 0.92–0.94 · 0 = above 0.94	0.901 **2 points**	0.928 **1 point**	0.910 **2 points**	0.929 **1 point**	0.946 **0 points**	0.949 **0 points**
4 Founder-feasible Share of the sector's products a founder could start for ~$1M or less	2 = 75%+ · 1 = 40–75% · 0 = under 40%	7 of 7 **2 points**	7 of 8 **2 points**	3 of 3 **2 points**	3 of 10 **0 points**	4 of 5 **2 points**	4 of 5 **2 points**
5 Local raw material Is the main input produced in Afghanistan? (slides 4–5)	2 = yes · 1 = partly · 0 = no	Fruit, nuts **2 points**	Partly: wheat, oilseeds **1 point**	Herbs, spices **2 points**	Cotton, wool **2 points**	Stone, limestone, clay **2 points**	No: resin imported **0 points**
Total (out of 10)		**10**	**6**	**10**	**6**	**6**	**3**
Result		**Deep-dive**	**Deep-dive**	**Deep-dive**	**Deep-dive**	**Deep-dive**	**Dropped**

Why plastics drops out: Afghanistan exports no plastic products competitively (*its one competitive product here is aluminum kitchenware), the sector is the furthest from current know-how, its home-market prize is the smallest, and every kilo of raw plastic (about $39M a year) is imported. Packaging for food exporters returns as an idea inside the food sector.

Order of the deep-dives follows "Afghanistan Net Export Value Creation" so the two decks match. For reference, nearby new-export markets (1C) are large for plastics ($154B) and building materials ($18B), but none is yet within reach of Afghan know-how at scale.

Sources: Harvard Growth Lab Atlas of Economic Complexity (2024): export and import values, RCA, and distance by 4-digit product; closeness is the trade-weighted average distance of each sector's products. CEPII BACI v202601 (2024). Sectors mapped to 4-digit product codes; pipeline counts products named on pages 2–5 of "Afghanistan Net Export Value Creation".

Sector 1: Afghanistan grows excellent dried fruit and nuts, but sells most of it unsorted and in bulk.

$1.38 vs $5.44
average price per kg: Afghan vs Turkish dried apricots (2024)

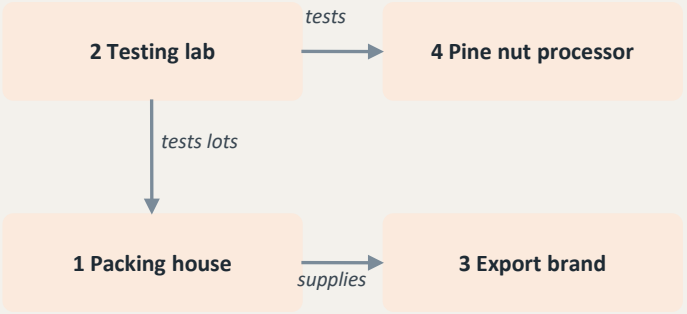
$0.49 vs $3.00
per kg Afghan raisins fetch in Pakistan vs India (2024)

~205,000 t
Kandahar grape harvest, about half dried into raisins (2025)

$1.00–1.20/kg
air freight Kabul–Delhi after Ariana cut rates (2025–26)

#	Business	What it sells	Start-up capital (indicative)	Time to revenue	Main source of a moat
1	**Grading & packing house**	Cleaned, sorted, graded raisins and apricots, packed to buyer spec	$0.3–0.6M	6–12 months	Locked-in grower supply + traceable, spec-consistent lots
2	**Food-safety testing lab**	Accredited aflatoxin, sulfite, moisture, and pesticide tests	$0.3–0.5M	6 months (tests); 12–24 (accreditation)	Trust: accreditation, independence, buyer recognition
3	**Afghan export brand**	Retail packs of heirloom Afghan varieties for Gulf, India, and diaspora	$0.05–0.15M + stock	3–6 months	Distinct varieties and story + retail relationships
4	**Pine nut processing & export**	Cracked, graded, roasted kernels sold direct, not in-shell to China	$0.1–0.25M + seasonal stock	One harvest season	Forest-community sourcing + quality + direct buyers

How the four businesses connect



Each one is a stand-alone business, but they are stronger together: the lab's certificates make the packing house's lots sellable, and the packing house gives the brand consistent product.

Why now

Surplus to process: with the Pakistan border closed, Kandahar farmers are drying more grapes, and raisin prices have slumped.
New routes: air corridors to India (from $1/kg) and China, plus Gulf food fairs, open buyers beyond Pakistan.
Buyers want consistency: Europe sources Afghan raisins mainly as low grades today; graded, tested lots can move up.

Workforce note

Sorting, stemming, and packing are traditionally done by women. Women can work in some factories with official permission (about 200,000 have it), and dried-fruit plants in Kabul and Mazar-i-Sharif employ many women. Plan for permits and separate work areas from day one.

Sources: CEPII BACI v202601 (2024 unit values); Pajhwok (Sept 2025, Kandahar harvest); Ariana Afghan Airlines via Pajhwok and WION (2025–26); Commodity Board raisin market reports (2026); AP (2024, women's work permits); AFP (July 2026, Mazar dried-fruit factory); GAFSP/IFC (Rikweda). Capital ranges are indicative.

Buyers pay up to six times more for the same raisins once they are sorted and graded, so a grading business brings that value home to Afghan farmers and exporters.

MARKET	START-UP CAPITAL (INDICATIVE)	TIME TO REVENUE	FIRST CUSTOMERS
Afghan raisins $128M, apricots $26M (2024)	$0.3–0.6M starter line	6–12 months (one drying season)	Indian, Gulf, and EU packers and importers

Price per kg Afghan exporters get, by buyer, vs competitors (2024)



■ Afghan exports ■ competitor average. **Buyers who get sorted, consistent lots (India, Germany) pay 6–9x what bulk buyers pay.**

What you would build

Receiving & testing: moisture and quality check of every farmer lot before payment.
Cleaning line: destemming, washing, de-stoning, drying back to 13–16% moisture.
Optical color sorter + metal detector: Indian-made 1–2 t/h sorters cost roughly $6–17k; used European units about $100k.
Packing & traceability: buyer-spec cartons and retail packs, each lot coded back to the grower.
Power: industrial zones get ~12 hours of grid power a day (business tariff ~$0.10/kWh), so budget for solar plus diesel backup.
Scale reference: large new plants cost $8–10M for 10,000–15,000 t a year (Samon, Kabul; Rikweda, GAFSP/IFC).

Strategy & moat

Position (needs-based): serve buyers who need consistent, tested, spec-matched lots (Indian premium packers, Gulf and EU importers), not spot bulk buyers.
Trade-offs: do not buy every lot that arrives; do not sell ungraded bulk into Pakistan; specialize in 2–3 products (e.g. green kishmish, apricots).
Fit: grower contracts with drying protocols → cleaner input → higher sorter yield → consistent lots → repeat buyers who pre-finance the next season.
Easy to copy (fine at first): the optical sorter itself. Anyone can buy one; the contracted, trained grower base and buyer track record are what rivals cannot copy quickly.

Main risks

Border closures and transit shocks; EU sulfite and mold rejections (Afghan apricots flagged in 2024–25); power gaps; cash tied up prepaying growers.

Real example

Tuğrul Tarım (Manisa, Türkiye) automated sorting and went from ~3 to 13 t/h, now 45,000 t a year. Türkiye's EU-registered Malatya apricot origin label adds an estimated 30–50% in value.

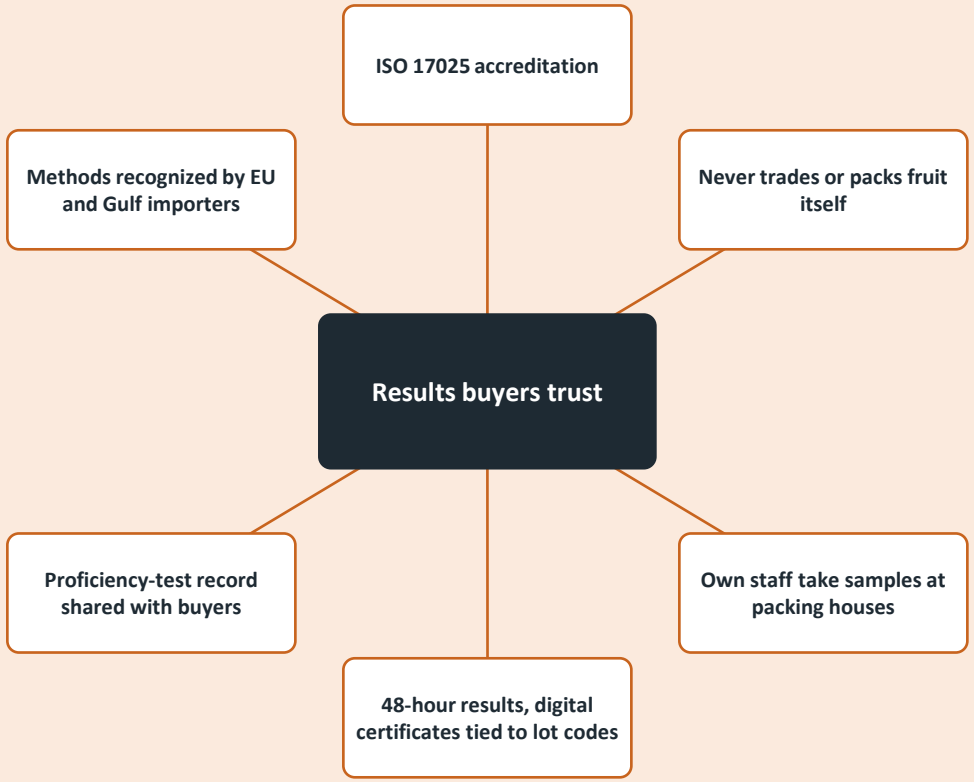
Sources: CEPII BACI v202601 (2024 unit values by buyer); IndiaMART supplier listings (sorter prices, 2026); Surplus Record (used Tomra listing); Pajhwok and DPMEA (Samon plant, July 2025); MIGA and GAFSP (Rikweda); DABS via Pajhwok (Nov 2025) and GlobalPetrolPrices (tariff); RASFF monthly summaries (2024–25); TOMRA customer story (Tuğrul Tarım); Istanbul Chamber of Commerce (GI value uplift). Capital is indicative.

A food-testing lab sells trust, which rivals cannot easily copy, and every exporter needs it.

The problem it solves

Strict limits: for dried fruit and most nuts sold to consumers, the EU allows only 2 µg/kg of aflatoxin B1 and 4 µg/kg in total (higher for almonds, pistachios, and figs), and 8 µg/kg of ochratoxin A in raisins and figs.
Afghan lots get flagged: EU alerts in 2024–26 named Afghan dried apricots and figs (sulfites) and apricot kernels (cyanide). Mold toxins dominate EU dried-fruit alerts.
Little local capacity: public labs exist (Ministry of Public Health in Kabul and Nangarhar; Ministry of Agriculture), but exporters need fast, independent, internationally recognized results.
Demand is growing: dried fruit and nut exports exceeded $500M a year; the health ministry trained 30 processors on export food-safety rules in July 2026.

Strategy & moat: an activity system built around trust



Trade-offs: no trading, no consulting-for-pass, no discount tests that skip proper sampling.
Easy to copy (fine at first): owning an HPLC machine. A rival can buy the same machine; it cannot buy two years of accreditation and buyer acceptance.

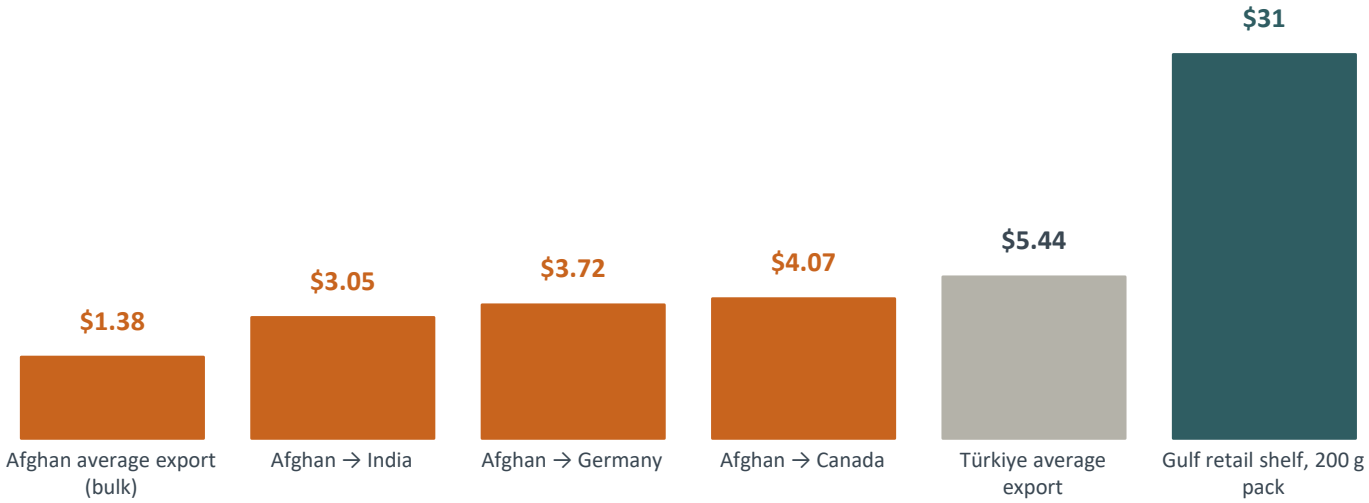
Business model & economics

What you sell: per-test fees, pre-shipment certificates, annual testing contracts with packing houses and exporters.
Price benchmarks per aflatoxin test: Pakistan university lab ~PKR 6,000 (~$21); Thailand ~$91; US ~$50.
Equipment: an HPLC system costs roughly $85–105k; start with HPLC, rapid test kits, sulfite, and moisture testing. Full pesticide testing (LC-MS/MS) can reach ~$2M.
Illustration: 20 tests a day × $35 × 250 days ≈ $175k revenue a year, before contracts.
Start-up capital: $0.3–0.5M (indicative), including accreditation by a foreign body.
Main risks: slow accreditation; price competition from labs in Pakistan, Uzbekistan, or Iran; trained chemists are scarce.
Real example: US almond and pistachio exporters ship to the EU on results from USDA-approved labs, which is what makes buyers accept them.

Sources: EU Regulation 2023/915 (maximum levels); RASFF notifications via Danish Agriculture & Food Council monthly reports and Wikifarmer weekly summaries (2024–26); GAIN lab assessment (Afghan public labs); Air Cargo Week (export value); Ministry of Public Health (July 2026 training); UVAS Lahore and Mahidol University rate lists; University of Arizona; Michigan lab budget (HPLC cost); STDF (LC-MS/MS lab cost); USDA AMS (approved-lab programs). Revenue is an illustration, capital is indicative.

Dried apricots sell for $1.38/kg in bulk but about $31/kg in Gulf supermarkets; an Afghan brand that packs and sells direct can keep more of that price at home.

Where the value sits: price per kg along the chain (dried apricots, 2024–26)



Bar heights on a square-root scale so small values stay visible. Shelf price: UAE retail, AED 22.55 per 200 g (2026). Figs show the same pattern: Afghan figs fetch $5.81/kg in India but $11.07/kg in Kuwait.

The business

What you sell: retail packs (200 g–1 kg) of distinctive Afghan varieties: green shade-dried kishmish, Shakarpara apricots, Kandahari figs, pale pistachios, mixed gift boxes.
Customers & channels: Gulf supermarkets (Lulu, Carrefour, Spinneys), Afghan and South Asian diaspora online, Indian premium retail via the air corridor; peaks at Ramadan, Eid, and Nowruz.
Model: asset-light. Buy graded product from a packing house (idea 1); pack in Afghanistan or a UAE free zone, whichever is cheaper; own the brand, certifications, and buyer relationships.
Start-up capital: $50–150k (indicative) for packaging, certifications, samples, and trade fairs, plus 3–6 months of stock and receivables.
Proof it can work: Afghan brands are already on Gulf shelves (Mira in Spinneys UAE; King Saffron in talks with Carrefour); five Afghan firms debuted at the Saudi Food Show in Sept 2026.

Strategy & moat

Position (variety-based): sell what Turkish and Californian brands cannot: Afghan heirloom varieties with a verifiable origin story, for buyers who pay for taste, gifting, and heritage.
Trade-offs: no unbranded bulk or private label; a narrow range of hero products; premium price, no discounting war with Turkish commodity packs.
Fit: exclusive grower and packer partners → consistent hero products → retailer trust and repeat listings → diaspora word of mouth → seasonal gift sales that fund next season's buying.
Easy to copy (fine at first): nice packaging or a website. Those are copied in weeks; exclusive supply of the best lots plus retailer relationships are not.

Main risks & how to manage them

Retailer terms: listing fees and 60–90 day payment; start with diaspora e-commerce and one Gulf distributor.
Inconsistent product: one bad batch loses a listing; contract a packing house and test every lot (idea 2).
Payments and banking: plan collections through a Gulf-based partner company.
Freight: air to India ~$1–1.20/kg is affordable for packs worth $20–30/kg.

Sources: CEPII BACI v202601 (2024 Afghan unit values by buyer); Talabat UAE listing (Bayara dried apricots, AED 22.55/200 g, 2026; brand shown only as a shelf-price benchmark); Spinneys UAE (Mira brand); TOLOnews (King Saffron at Gulfood); UNDP (Saudi Food Show 2026); Ariana via Pajhwok (freight). Capital is indicative.

Pine nuts leave Afghanistan in the shell; cracking, grading, and packing them here would keep at home the profit that now goes to processors in China and Pakistan.

Who earns what along the chain today (peach = done in Afghanistan, gray = done abroad)

Forest collectors

Paktia, Khost, Nangarhar

Farm-gate prices fell sharply in 2026 despite a strong crop

›

Afghan traders

in-shell, by air to Shanghai

~$15–20/kg export; ~90% goes to China

›

Chinese / Pakistani processors

crack, grade, roast, pack

Sold on to Europe; Afghan nuts often sold as "Pakistani"

›

Retail buyers

Europe, India, Gulf

India retail ≈ $50–60/kg in shell; Europe imports growing ~10%/yr

What the business does in Afghanistan (steps now done abroad)

1. Buy cones / in-shell from contracted villages
2. Clean & dry to safe moisture
3. Soak & crack (specialized machines)
4. Separate kernels, grade by size
5. Color-sort, test for mold toxins
6. Roast (optional), vacuum, or nitrogen pack

Key facts

Market: Afghan exports ~1,031 t worth ~$15M in 2025 (BACI recorded $38M in 2024); China net-imported $88M of in-shell pine nuts in 2023.
Start-up capital: $0.1–0.25M (indicative) for cracking, grading, roasting, and packing, plus cash to buy the whole harvest in Sept–Nov.
Time to revenue: one harvest season.

Strategy & moat

Position (access-based): long-term buying agreements with forest communities that outsiders, including Chinese buyers, cannot easily reach, plus direct sales of kernels to India, the Gulf, and European importers.
Trade-offs: no spot sales of in-shell nuts to Chinese traders; fewer, bigger buyers who pay for size grade and test results; slower growth, higher margin.
Fit: pre-season finance for villages → first pick of the best cones → size-graded, tested kernels → direct buyers who pay more → cash to pre-finance again.
Easy to copy (fine at first): the cracking machine (cheap, widely available). The village relationships and buyer track record are.

Main risks

Price swings: 2026 farm-gate collapse; hedge with forward contracts.
Buyer power: China dominates; diversify early to India and the Gulf.
Sustainability: overharvesting forests; pay for responsible collection.
Logistics: air corridors can stop, as they did in 2021.

Sources: Commodity Board (Afghan pine nuts, 2026: exports, farm-gate prices); Xinhua (90% to China); MERICS (processing value captured in China); IWPR (Afghan nuts sold as Pakistani); IndiaMART (Indian chilgoza retail prices, 2026; converted at ~₹88/$); CBI (European pine nut market); OEC (China net imports, 2023); CEPII BACI v202601; TOLOnews (2021 export drop). Capital is indicative.

A founder in dried fruit and nuts can test every idea in 90 days by talking to the exporters, buyers, and regulators who already exist, before buying any machines.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Dry Fruit Exporters Union and Kandahar Chamber of Commerce and Investment** Kandahar alone shipped 182,000 t of fruit worth $429M in 2025/26. Visit the chamber office in Kandahar and ask for its member list; most large exporters are members.	Introductions to 10 exporters. Ask each: how much less do you get for ungraded, untested lots, and how many shipments were rejected or cut in price last year?	Exporters lose enough on ungraded fruit that they will pay a fee per ton for grading, packing, and a lab certificate.
Weeks 2–6	**The five firms UNDP took to the Saudi Food Show 2026** New Yaqoobi, Afghan Red Pomegranate, Amin Mohammad Pure Dry Fruit, King Khan, and Wasela met 80 buyers and signed 11 agreements for 1,350 t. Reach them through UNDP Afghanistan's private-sector team.	Which buyers asked for certificates, retail packs, or a brand that the firms could not supply? Would they buy that service from you?	Gulf buyers will pay more for packed, certified Afghan product, and the exporters know who they are.
Weeks 4–8	**Buyers in Dubai and Delhi** Gulf importers at Gulfood (Dubai, every February) and dry-fruit wholesalers in Delhi's Khari Baoli market. Ask the Afghan Business Council in the UAE for warm introductions.	A sample order of graded raisins or pine nuts at a stated price above today's ungraded price.	The price gap on the idea pages is real and buyers will pay it in writing.
Weeks 6–12	**Afghanistan National Standards Authority (ANSA) and the Ministry of Agriculture** Request a meeting through the chamber; ask for the list of tests that labs in Kabul can and cannot do today.	Can a private lab be approved to issue certificates? Which tests (aflatoxin, pesticide residue, moisture) are missing?	A private testing lab is legal, and its certificates will be accepted by buyers abroad.

By day 90 you should know: the price premium for graded and certified product, the fee exporters will pay, and whether a private lab can issue accepted certificates. If all three are positive, pilot one packing line.

Sources: FreshPlaza (2026) Kandahar Chamber export figures; UNDP Afghanistan (Oct 2026) Saudi Food Show 2026; Gulfood exhibitor lists (Afghan firms); ACCI archive (Afghan Business Council, Dubai); ANSA (2025).

Sector 2: Afghanistan imports about $1.3B a year of basic foods, such as flour and cooking oil, that its own mills and presses could make from Afghan wheat, cottonseed, and fruit.

Wheat flour imports (2024)	Flour needed vs. made at home	Edible oil imports (2024)	Pakistan border
$640M	~6M t vs. ~3.5M t	~$61M	Closed since Oct 2025

Products from "Afghanistan Net Export Value Creation", and the founder test

Product	6-digit code	Page	Why it passed	Founder-feasible	Becomes idea
Wheat flour	110100	2	$640M import bill; rated High	✓	1 Flour mill
Rice, milled	100630	2	$362M import bill; rated Medium	✗	Paddy supply not local enough
Food preparations	210690	2	$82M import bill; rated Medium	✓	3 Packaged foods
Oilcake / animal feed	230400	2	$34M import bill; rated Medium	✓	2 Oil & feed
Flour-based foods	190190	2	$29M import bill; rated High	✓	3 Packaged foods
Sunflower & cottonseed oil	151219	2	$29M (+$32M related oils); Medium	✓	2 Oil & feed
Dried beans, prepared	071339	1B	$42M prize (canned beans 1.8x)	✓	4 Fruit & veg processing
Soft drinks	220210	1B	$76M prize	✗	Needs bottling scale and brand

Plastics, packaging & household goods was dropped as a sector (slide 6); food packaging returns here as part of idea 3.

Result: 4 business ideas

1. **Modern flour mill**
   Buy Kazakh and Afghan wheat, mill near a rail link, sell consistent flour to bakeries; bran goes to feed.
2. **Oil pressing & animal feed**
   Press cottonseed, sunflower, and safflower: bottled cooking oil plus oilcake for dairy and poultry.
3. **Packaged foods & food packaging**
   Biscuits, noodles, ready mixes, plus cartons and pouches for dried-fruit exporters.
4. **Fruit & vegetable processing**
   Turn extra harvest fruit into tomato paste, fruit pulp, pickles, and canned beans.

Sources: CEPII BACI v202601 (2024 imports); "Afghanistan Net Export Value Creation" page 5 (ability ratings); Amu TV via Daryo (Aug 2025: ~6M t flour need, ~3.5M t made locally, ~200 factories); FAO GIEWS (2025–26); NPR (Feb 2026, border closure).

Uzbek mills turn Kazakh wheat into flour and sell it to Afghanistan; an Afghan mill can do this at home.

Today: Kazakh wheat
grown and sold to Uzbek mills
raw material crosses one border

›

Uzbek mill
~1.1M t of flour in 2024, $322M
99.9% of it goes to Afghanistan

›

Truck to Afghanistan
flour crosses a second border
bran stays in Uzbekistan

›

Afghan bakeries
blend imported and local flour
for protein and price

›

Instead: Afghan mill
Kazakh + Afghan wheat milled at home
flour to bakeries; bran to local feed

What the data says

Import bill: $640M of wheat flour in 2024, almost all from Uzbekistan ($322M) and Kazakhstan ($317M).
Not enough milling: FAO says Afghanistan imports flour even in good harvest years because domestic milling capacity is short.
Room to grow: ~200 flour factories make about 1M t a year; the country needs ~6M t.
Passes the raw-material test: wheat is most of the cost of flour, and bran (a fifth or more of the grain) stays home as animal feed.

The business

What you sell: branded bread and baking flour in 50 kg sacks, made to a fixed protein spec.
Customers: bakeries (naan), wholesalers, and later food makers (idea 3).
Where: next to a rail or border link (Hairatan–Mazar, Herat) to receive wheat in bulk.
Start-up capital: $0.6–1.0M for a 60–100 t/day mill (indicative), plus wheat stock.
Time to revenue: 6–9 months after equipment order.

Strategy & moat

Position (access-based): long-term wheat contracts with Kazakh traders and Afghan farmers, and a rail-side site rivals cannot easily copy.
Trade-offs: serve bakeries that pay for consistent baking quality; do not chase the cheapest-flour price war.
Fit: grain lab tests protein → blending recipe → consistent naan → loyal bakeries → steady volume to negotiate wheat prices.
Easy to copy (fine at first): the roller mill itself; second-hand mills are cheap and available.

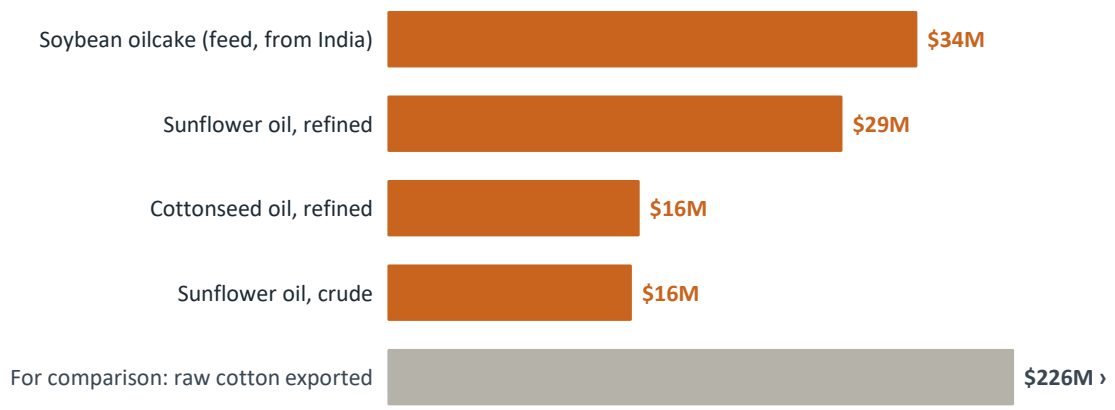
Main risks & how to manage them

Power: industrial parks get about 12 hours a day; plan solar plus a generator from day one.
Wheat price swings: buy forward in harvest season; hold 2–3 months of stock.
Import competition: Uzbek mills are subsidized by scale; win on freshness and service.
Payments: settle wheat purchases through Gulf or Central Asian partners.

Sources: CEPII BACI v202601 (2024); Uzbek flour exports 1.1M t, $322M, 99.9% to Afghanistan (BACI 2024); UkrAgroConsult and Kun.uz (2026: Uzbek mills run on Kazakh wheat); FAO GIEWS (milling capacity); Daryo/Amu (Aug 2025: ~200 factories, ~1M t); Pajhwok (Nov 2025: 12 h power in industrial towns). Capital indicative.

Afghanistan grows cottonseed and sunflower but imports cooking oil and animal feed; one press can make both, and sell them to the grocers and farms that buy imports today.

Afghan imports, $M (2024)



Raw cotton exports bar is cut off (actual $226M). Afghanistan exports the cotton and, with it, the chance to press the seed. UNDP notes the country was once nearly self-sufficient in edible oil.

The business

What you sell: bottled cooking oil (1–5 L) and oilcake for dairy and poultry farms.
Inputs: cottonseed from ginneries in the north, sunflower and safflower from contract farmers.
Customers: grocery wholesalers; feed mills and large poultry farms.
Start-up capital: $0.3–0.8M for expellers, filtration, and a bottling line (indicative).
Time to revenue: one harvest season.

Strategy & moat

Position (access-based): supply contracts with ginneries and oilseed farmers in Balkh, Kunduz, and Takhar that newcomers cannot quickly replicate.
Trade-offs: sell oil and cake together; skip cheap palm-oil blending and imported-oil trading.
Fit: seed contracts → steady press runs → both oil and cake sold → better seed prices → more farmers sign up.
Easy to copy (fine at first): the expeller press; anyone can import one.

Main risks & how to manage them

Cottonseed cake: contains gossypol; sell to cattle first, treat before poultry use.
Imported oil prices: Kazakh oil is cheap; compete on freshness and local trust.
Seasonality: store seed properly to run the press all year.
Packaging: bottles and caps are imported; buy in bulk.

Sources: CEPII BACI v202601 (2024 imports: sunflower oil 151219 and 151211, cottonseed oil 151229, oilcake 230400; raw cotton exports 520100); UNDP Private Sector Mapping in Afghanistan (2025) on oilseeds and edible-oil self-sufficiency. Capital indicative.

Pakistan used to supply most packaged foods; with the border closed, Afghan makers can take its place.

$111M
packaged-food imports (flour-based foods + food preparations), 2024

60%
of those came from Pakistan

Almost none
of Afghan imports now come through Pakistan (World Bank data, June 2026)

6,500
factories now operating in Afghanistan, up from ~3,000 (2021)

The business

What you sell: biscuits, noodles and pasta, ready mixes and spice blends for the home market.
Second line: cartons, labels, and pouches for dried-fruit and spice exporters (sector 1 and 3 ideas).
Customers: wholesalers serving neighborhood shops; exporters for packaging.
Inputs: local flour (idea 1) and oil (idea 2).

What it takes to start

Equipment: a biscuit or noodle line, or a carton and printing line.
Capital: $0.3–1.0M per line (indicative).
Skills: food technologist; packaging designer.
Licenses: food-safety registration; industrial park plot.
Time to revenue: 6–12 months.

Main risks & how to manage them

Border reopens: Pakistani brands return; lock in shelf space and distributor contracts now.
Imported packaging film: buy forward; design for local cartons.
Power: plan for 12-hour grid supply.
Food safety: use the testing lab (sector 1, idea 2).

Strategy & moat

Position (access-based): direct relationships with the wholesalers who serve thousands of small shops, plus brand trust built while imports are scarce.
Trade-offs: focus on a few fast-moving staples at local price points; do not chase premium imported brands.
Fit: own flour and oil inputs → stable cost → reliable supply to wholesalers → shelf space → volume.
Easy to copy (fine at first): a modern production line; competitors can buy the same machines.

Sources: CEPII BACI v202601 (2024: 190190 $29M, 210690 $82M; Pakistan $67M of $111M); World Bank data via Arab News Pakistan (June 2026 import routes); Pajhwok (Aug 2026, factory count); NPR (Feb 2026, border closure). Capital indicative.

When borders close, fruit rots or sells very cheaply; a processing plant can turn extra fruit into paste, pulp, and pickles that keep for months and are lighter to ship.

Too much fruit at harvest
grapes, tomatoes, apples, pomegranates
sold for as little as 5 AFN/kg

›

Sort & wash
reject fruit goes to pulp
women can work in separate lines

›

Process
pulp, concentrate, pickle, can
removes water: lighter to ship

›

Pack
aseptic drums, jars, cans
6–24 months shelf life

›

Sell
home market, Central Asia, India
paste, pulp, pickles, canned beans

What the data says

Price collapse: one Kabul grower sold 560 kg of grapes for AFN 4,000, against AFN 20,000–30,000 when routes to Pakistan were open.
Losses: traders in Kabul say over half their produce spoiled or sold cheaply during the closures.
Already exported: Afghan tomato paste sells at $2.62/kg, above the world average of $1.41/kg (small volumes).
Raw-material test (slide 4): process second-grade and surplus fruit, since pulp and concentrate are far lighter to ship; sell the best fruit fresh when a route is open.

The business

What you sell: tomato paste, fruit pulp and concentrate (B2B), pickles and canned beans (retail).
Customers: food makers, juice bottlers, wholesalers; Central Asian buyers for pulp.
Model: a multi-fruit plant that runs from June to November.
Start-up capital: $0.4–1.0M (indicative).
Time to revenue: one harvest season.

Strategy & moat

Position (needs-based): serve food makers who need steady, tested pulp and paste year-round rather than retail brand battles.
Trade-offs: sell B2B first; no consumer juice brand war with imports.
Fit: fruit calendar (apricot → tomato → grape → apple → pomegranate) keeps the plant busy → low cost per kg → reliable supply.
Easy to copy (fine at first): the evaporator or canning line itself.

Main risks & how to manage them

Power for evaporators: pair with solar or biomass boilers.
Food safety: HACCP from day one; lab testing.
Packaging costs: drums and cans are imported; size orders carefully.
Fruit prices recover: that is good for farmers; keep contracts flexible.

Sources: FreshPlaza (2026, Koh Daman grape prices); Hasht-e-Subh via Environmental Peacebuilding (Nov 2025, losses); FreshPlaza (2025 fresh fruit exports 317,517 t, ~$142M); CEPII BACI v202601 (tomato paste 200290 unit values); UNDP Private Sector Mapping (2025) on jams, juices, tomato paste, pickles. Capital indicative.

In food milling, the World Food Program is a large buyer that already purchases flour from Afghan mills, so a new mill should start by qualifying as its supplier.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**World Food Program (WFP) Afghanistan, procurement unit** WFP bought 13,100 t of flour from Afghan millers in one month of 2025 and now pays mills to grind imported wheat. Register as a supplier on the UN Global Marketplace (ungm.org) to see its tenders.	Specifications, volumes, and shortlist rules. WFP plans to mill about 100,000 t of wheat in 2026/27; its tender asks for 60 t/day capacity and three years of fortified-flour experience (documents to Kabul.Logistics@wfp.org).	A new or upgraded mill can win an anchor customer before it sells a single retail bag.
Weeks 2–6	**Flour Mills Union (head: Mohammad Yousuf Shahbaz) and the 25 large mills** About 200 mills grind 1M t a year, yet Afghanistan was the largest buyer of Russian flour in 2024. Large mills include Bakhtar and Khoshe Gandom (Kabul), Amir Faisal and Mustafa Jamal (Mazar), and Arya and Barakat Hariwa (Herat).	Why do you run below capacity: power, wheat supply, or buyers? Would you sell a share or a production slot?	The fastest route may be upgrading an idle mill, not building a new one.
Weeks 4–8	**Wheat and oilseed sellers in Kazakhstan and Uzbekistan** Contact through traders at Hairatan port and the Termez International Trade Center, where Afghan traders pay no tax.	Delivered price of wheat grain and sunflower seed compared with ready flour and oil.	Grinding here leaves a margin per ton after power and transport.
Weeks 6–12	**Omaid Bahar and Gulzad Group** Omaid Bahar runs a multi-fruit processing plant in Kabul certified to HACCP and ISO 22000; Gulzad sells Afghan flours, oils, and fortified foods at Gulfood. Both know local packaging suppliers and buyers.	Would they buy your oil, flour, or packaging, or contract you to pack for them? What do they import that they would rather buy here?	Established food firms will be the first customers for local packaging and ingredients.

By day 90 you should know: the margin per ton of grain milled here against imported flour, and one letter of intent from an institutional buyer. Without both, do not buy equipment.

Sources: WFP Afghanistan Situation Reports (June–Oct 2025; Feb 2026); UNGM notice 310265 (WFP milling services EOI); Daryo (2024) Termez tax exemption for Afghan traders.

Sector 3: Afghanistan is a leading exporter of hing, saffron, and cumin, but sells them mostly raw.

Asafoetida (hing) exports
$123M, 99% to India

Saffron export price
$735/kg vs. $311 world

Cumin: sell vs. buy back
$1.39 vs. $3.17 per kg

Medicinal plants export price
$1.15/kg vs. $4.03 world

Products from "Afghanistan Net Export Value Creation", and the founder test

Product	6-digit code	Page	Why it passed	Founder-feasible	Becomes idea
Medicinal & aromatic plants	121190	1A, 1B	$1,040M buyer market; $132M prize	✓	2 Extracts & oils
Cumin seeds	090930	1A, 1B	$422M buyer market; $66M prize	✓	1 Spice house
Saffron	091020	1A	$65M buyer market	✓	3 Saffron brand
Asafoetida (hing)	130190	added	Afghanistan's largest spice export; India the only big buyer	✓	1 Spice house (add-on)
Essential oils	330129	added	already sold at ~$3,400/kg to Germany and France	✓	2 Extracts & oils

"Added" rows: Afghanistan is already highly competitive (RCA well above 10) but these failed the 1A buyer-diversity filter because India dominates; they enter as add-ons.

Result: 3 business ideas

1. **Spice cleaning & grading house**
   Clean, sort, sterilize, and grade cumin and hing to buyer specs; sell direct to Gulf, Turkish, and Indian buyers.

2. **Botanical extracts & essential oils**
   Distill medicinal plants and Damask rose into oils and extracts that sell for many times the raw herb.

3. **Saffron brand & direct export**
   Lab-graded, traceable Herat saffron sold in retail packs and to Gulf and Indian brands.

Sources: CEPII BACI v202601 (2024 exports and unit values: 130190, 091020, 090930, 121190, 330129; Afghan cumin imports from India); "Afghanistan Net Export Value Creation" pages 2–3 (buyer markets, prizes).

Afghanistan sells cumin for $1.39/kg and buys cleaned Indian cumin for $3.17/kg; cleaning and grading at home can close much of that gap for Afghan exporters.

Cumin seeds (090930), price per kg, 2024



Afghanistan exported $18.9M of cumin and imported $15.1M, mostly cleaned Indian cumin. Hing shows the same pattern: India imports about 1,500 t a year, mostly Afghan, and its firms grade, compound, and re-export it.

The business

What you sell: cleaned, destoned, sorted, and steam-sterilized cumin, plus graded raw hing by type.
Customers: spice packers in the Gulf and Türkiye; Indian hing compounders who buy direct by grade.
Not compounding: mixing hing with flour adds weight, so it fails the raw-material test (slide 4); grade here, compound near the buyer.
Start-up capital: $0.3–0.7M (indicative).
Time to revenue: one harvest.

Strategy & moat

Position (needs-based): serve buyers who need tested, spec-matched lots (moisture, purity, microbes) rather than spot traders buying ungraded seed.
Trade-offs: no blending, no retail brand at first; fewer products, done to export spec.
Fit: grower contracts → clean intake → steam sterilization → lab certificate → repeat buyers who pre-pay.
Easy to copy (fine at first): the cleaning line; the buyer track record and certificates are the moat.

Main risks & how to manage them

Residue and microbe tests: use the testing lab (sector 1, idea 2).
India routes: air corridor and Iran routes can close; keep Gulf buyers.
Price volatility: cumin prices swing with Indian harvests; contract part of volume.
Seasonality: add other seeds (coriander, fennel) to fill the plant.

Sources: CEPII BACI v202601 (2024: Afghan cumin exports $18.9M at $1.39/kg, imports from India $15.1M at $3.17/kg, world average $3.18/kg); India Sea Trade News (2026: India imports ~1,500 t of hing); Business Standard (85% of India's hing from Afghanistan). Capital indicative.

Medicinal plants leave Afghanistan at $1.15/kg; distilled into oils and extracts, they sell for many times more, and Afghanistan already sells a little oil at ~$3,400/kg.

Collect & grow
wild herbs, Damask rose, lavender, mint
village collectors, contract growers

›

Dry & sort
clean, dry to spec, record origin
traceability from day one

›

Distill / extract
steam distillation, solvent extraction
removes >95% of the weight

›

Test & certify
purity, organic, cosmetic standards
the price step

›

Sell
EU and Gulf cosmetics, pharma, aromatherapy
oils, extracts, rose water

What the data says

Raw today: $29M of medicinal plants exported at $1.15/kg, mostly to India; the world average is $4.03/kg.
The next step pays 4x: extracts and essential oils sell for about four times the raw-plant value ("Afghanistan Net Export Value Creation", page 3).
Proof it works: Afghanistan already exports small amounts of essential oils at a recorded ~$3,400/kg, mainly to Germany and France.
Passes the raw-material test: the plant is the main cost and distillation removes almost all the weight, so oils are far cheaper to ship.

The business

What you sell: rose oil and rose water, herbal extracts, other essential oils.
Customers: EU and Gulf cosmetics and natural-health brands; ingredient traders.
Model: one distillery serving many growers; buy flowers and herbs by weight.
Start-up capital: $0.2–0.6M per distillery (indicative).
Time to revenue: one flowering season (roses: May–June).

Strategy & moat

Position (variety-based): sell what others cannot: Afghan varieties and wild-harvested herbs with verified origin and certification.
Trade-offs: focus on 2–3 oils with certification; no bulk dried-herb trading.
Fit: grower network → fresh flowers distilled same day → higher oil yield and quality → certification → premium buyers.
Easy to copy (fine at first): the stills; the certified, traceable supply network is the moat.

Main risks & how to manage them

Certification costs: start with buyers who accept lab tests; add organic later.
Banking with EU buyers: use a Gulf-based trading partner.
Harvest labor: many collectors are women; organize women-only collection points.
Over-harvesting: pay for sustainable wild collection.

Sources: CEPII BACI v202601 (2024: 121190 exports $29.4M at $1.15/kg, world $4.03/kg; 330129 exports $0.8M at ~$3,400/kg to Germany and France); "Afghanistan Net Export Value Creation" page 3 (extracts 4.0x); UNDP Private Sector Mapping (2025) on Damask rose and essential oils. Capital indicative.

Afghan saffron already sells for more than twice the world price; packing it and selling direct to buyers keeps more of that money in Afghanistan instead of with traders.

$59.9M
saffron exported in 2024

$735/kg
Afghan export price vs. $311/kg world average

57% · 25%
share bought by India and Saudi Arabia

50–70 t
production potential with better cultivation and certification (UNDP)

The business

What you sell: lab-graded saffron in 1–5 g retail packs and 100 g–1 kg trade packs.
Customers: Gulf supermarkets and spice brands, Indian premium brands, diaspora online.
Model: buy from Herat cooperatives, grade by ISO 3632 lab test, pack, ship by air.

What it takes to start

Equipment: drying room, lab testing contract, packing line.
Capital: $50–200k plus stock (indicative).
Skills: grading, export documents, brand design.
Licenses: food-safety registration; organic later.
Time to revenue: one harvest (Oct–Nov).

Main risks & how to manage them

Adulteration scandals: test every lot and print the result on the pack.
Iranian competition: compete on traceability and grade, not price.
Air freight: tiny weight makes air affordable; keep two routes.
Payments: Gulf partner company.

Strategy & moat

Position (variety-based): top-grade, traceable Herat saffron with a lab certificate on every pack, for buyers who pay for purity.
Trade-offs: no bulk sales to traders; no blending of grades; a narrow range of pack sizes.
Fit: farmer contracts → careful drying → lab grade → certificate on pack → retailer trust → repeat orders.
Easy to copy (fine at first): nice packaging or a website; rivals copy those in weeks.

Sources: CEPII BACI v202601 (2024: saffron 091020 exports $59.9M at $735/kg; India $33.9M, Saudi Arabia $14.8M; world average $311/kg); UNDP Private Sector Mapping in Afghanistan (2025) on production potential and the National Saffron Development Program. Capital indicative.

For spices and saffron, the Pakistan border closure makes new buyers urgent, and the saffron union and Indian traders are the first calls a founder should make.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Afghanistan National Saffron Union** Head: Ibrahim Adil. Exported 38 t worth $67.5M in 2025; 95% grown in Herat; main markets India, Saudi Arabia, and the UAE. Then meet the leading Herat firms: Aryana Saffron, Pashton Zarghon Saffron Women's Company, and Afghan Chashni Food Industry (a women-led firm that won a two-year contract at an Oman expo).	Prices by grade; which buyers want retail packs or a brand; who already packs in Herat.	A branded, packed saffron earns clearly more than bulk, and growers will supply a new brand.
Weeks 2–6	**Cumin and hing exporters in Herat, Kandahar, and Kabul** About 89% of Afghan cumin went to Pakistan, and that border has been closed since October 2025. Reach them through the provincial chambers.	Where are you selling now? What would buyers in India, the Gulf, or Türkiye require (cleaning, sterilizing, testing)?	Exporters cut off from Pakistan will pay for cleaning and grading that opens other markets.
Weeks 4–8	**Spice buyers in Delhi (Khari Baoli) and hing processors in India** India is the main buyer of raw hing. Ask Afghan traders in Delhi or the Afghanistan International Trade Council in Dubai for introductions.	Specifications and a sample order for cleaned cumin and graded hing.	Indian buyers pay more for cleaned, graded product shipped by air or via Iran.
Weeks 6–12	**Arwin Pharma (Herat Industrial Park) and ACCI trade delegations** Arwin makes 78 medicines and plans 150; ask whether it buys plant extracts. ACCI regularly takes delegations to Türkiye, Indonesia, and Central Asia.	Which extracts and oils it imports today, in what purity and volume; a seat on the next delegation to meet extract buyers.	A small extraction or distilling unit has a buyer at home before it looks abroad.

By day 90 you should know: which markets replace Pakistan, the price for cleaned spice, and the saffron brand premium. Then pilot one cleaning line or one saffron pack.

Sources: Bernama/Xinhua (Jan 2026) saffron exports; Arab News (2024) Saffron Union markets; "Afghanistan Net Export Value Creation" (cumin destinations, BACI 2024); WFP (Feb 2026) border closed since 12 Oct; ACCI archive.

Sector 4: carpets are woven in Afghanistan but finished in Pakistan; the closed border is a chance to do the washing, finishing, and selling here instead.

Hand-knotted carpet exports (2024)
$11.7M at $17.75/kg

Share once sent to Pakistan
~80% (weavers' union)

Türkiye: buys vs. resells
$8.77 vs. $24.47 per kg

Raw cotton exports (2024)
$226M

Products from "Afghanistan Net Export Value Creation", and the founder test

Product	6-digit code	Page	Why it passed	Founder-feasible	Becomes idea
Hand-knotted wool carpets	570110	1A, 1B	$323M buyer market; $8M prize	✓	**1 Finishing hub · 2 Direct brand**
Tufted carpets	5703	1C	$7.2B world market, nearby	✓	**3 Tufted carpets & bedding**
Textile wadding	5601	1C	$3.0B world market, nearby	✓	**3 Tufted carpets & bedding**
Cotton yarn (from raw cotton)	5201→5205	1B	$24M prize	✗	Export lint as is for now (slide 5)
Cotton fabric	520811	2	$36M import bill; Medium	✗	Weaving mill scale
Polyester fabrics	540752 etc.	2	~$400M imports; rated Low	✗	Imported yarn, big mills

Result: 3 business ideas

1. **Carpet washing & finishing hub**
   Wash, clip, repair, and certify Afghan carpets at home, the step Pakistan used to do.

2. **Direct-to-buyer Afghan carpet brand**
   Sell finished carpets direct to designers, rug stores, and online buyers in the US, Europe, and the Gulf.

3. **Tufted carpets & bedding**
   Machine-tufted carpets and quilts with wadding for returnee households and the region.

Sources: CEPII BACI v202601 (2024); "Afghanistan Net Export Value Creation" pages 2–5; Amu TV (Afghan Carpet Weavers' Union: ~80% of production exported to Pakistan); "Afghanistan Net Export Value Creation" page 3 (Türkiye unit values).

With the Torkham border closed, Afghan workshops can wash and finish carpets, the work Pakistan used to do, and sell them abroad as “Made in Afghanistan.”

Weaving
home looms, many women weavers
Afghan wool and dyes

›

Washing
wash, rinse, dry in the sun
needs clean water and wastewater care

›

Finishing
clip, repair, stretch, fringe
the step done in Pakistan

›

Certify & photograph
origin tag, size, knot count
ready for online and B2B

›

Export
Türkiye, US, Europe, Gulf
as “Made in Afghanistan”

What the data says

The old route: semi-finished Afghan carpets went to Pakistan for final processing and were exported under Pakistani labels.
It is broken: Pakistani exporters warned in Oct 2025 that the border closure stalled their raw supply; Pakistan’s carpet exports fell over 20% in 2025–26.
The margin: Pakistani traders earned a 10–15% premium re-exporting Afghan carpets; finished value is much higher.
Space exists: a dedicated carpet industrial park is planned in Aqcha (Jawzjan), the carpet belt.

The business

What you sell: washing and finishing as a service (per m²), and finished carpets bought from weavers.
Customers: carpet traders and exporters who used to ship to Pakistan; idea 2.
Where: Kabul, or Aqcha/Andkhoy in the north.
Start-up capital: $0.3–0.8M incl. water treatment (indicative).
Time to revenue: 3–6 months.

Strategy & moat

Position (needs-based): serve exporters who need consistent, export-grade finishing at home now that Pakistan is out of reach.
Trade-offs: finish to one high standard; no raw-carpet trading.
Fit: trained finishers → consistent quality → certified origin → exporters bring volume → lower cost per m².
Easy to copy (fine at first): washing pools and tools; the skilled finishers and exporter relationships are the moat.

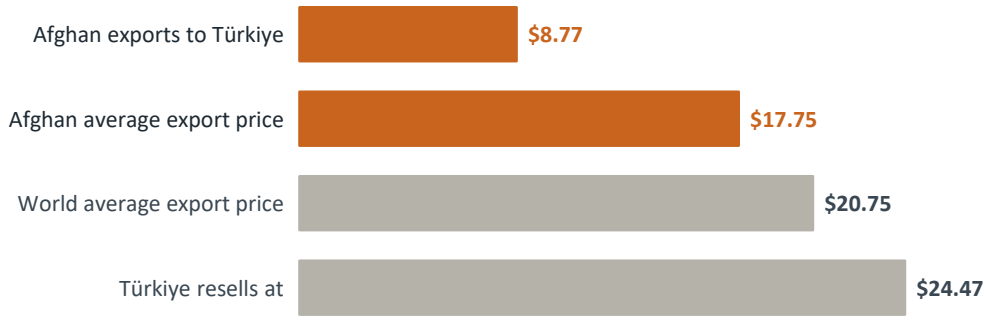
Main risks & how to manage them

Water and wastewater: recycle water; treat dye effluent.
Border reopens: Pakistan competes again; lock in exporters with quality and price.
Power: drying and pumps need reliable power; use solar.
Buyer access: trade fairs cost $15–20k per stand; share stands.

Sources: INP-WealthPK (Oct 2025, semi-finished carpets finished in Pakistan); Express Tribune (Nov 2024; Oct 2026, Pakistan carpet exports down >20%); Daily Times (10–15% re-export premium); UNDP Private Sector Mapping (2025: Aqcha carpet industrial park planned; trade fair costs). Capital indicative.

Türkiye buys Afghan carpets for $8.77/kg and sells them for $24.47/kg; an Afghan brand selling direct to foreign buyers keeps more of that difference at home.

Hand-knotted carpets (570110), price per kg, 2024



Afghanistan exported $11.7M of hand-knotted wool carpets in 2024; the US ($3.7M) and Türkiye ($2.7M) were the largest buyers.

The business

What you sell: finished, certified hand-knotted carpets, including custom sizes and colors.
Customers: interior designers, independent rug stores, and online buyers in the US, Europe, and the Gulf.
Channel: partner showrooms abroad plus online; one Kabul maker already sells via its own showrooms in Australia, the UK, and Germany.
Start-up capital: $100–300k, mostly inventory (indicative).
Time to revenue: 3–6 months.

Strategy & moat

Position (variety-based): a named-origin collection (weaving village, natural dyes, knot count) with custom orders that factory rugs cannot match.
Trade-offs: no machine-made rugs; no discounting; a curated collection.
Fit: own finishing (idea 1) → consistent quality → designer trust → custom orders → steady work for weavers.
Easy to copy (fine at first): a website or Instagram account; anyone can open one.

Main risks & how to manage them

Payments: sell through a Gulf or Turkish partner company.
Long cash cycle: pre-sell custom orders with deposits.
Reputation: prove fair pay for weavers with simple audits.
Freight: ship by sea via Türkiye; carpets keep.

Sources: CEPII BACI v202601 (2024: 570110 unit values and destinations); “Afghanistan Net Export Value Creation” page 3 (Türkiye buys at $8.77/kg, resells at $24.47/kg); Daily Times (Kabul maker’s showrooms abroad); Pajhwok (May 2025, Kabul–Ankara carpet export cooperation). Capital indicative.

Machine-made carpets and bedding are close to what Afghan firms already make, and the millions of families returning from Iran and Pakistan need them now.

$7.2B
world market for tufted carpets, a nearby product (1C)

$3.0B
world market for textile wadding (quilts, bedding fill)

2.6M
Afghans returned from Iran and Pakistan, Jan–Nov 2025

97%
of recorded tufted-carpet imports came from Uzbekistan

The business

What you sell: machine-tufted carpets and rugs; quilts and comforters with cotton or polyester wadding.
Customers: bazaar wholesalers, housing developers, aid buyers for returnee kits; later Central Asia.
Model: a small tufting line plus a quilting line under one roof.

What it takes to start

Equipment: tufting machine, backing and finishing; carding and quilting machines.
Capital: $0.4–1.0M (indicative).
Inputs: imported yarn at first; local cotton for wadding.
Skills: machine technicians, designers.
Time to revenue: 6–9 months.

Main risks & how to manage them

Imported yarn prices: start with cotton wadding, which uses local cotton.
Uzbek and Turkish competition: compete on fast delivery and local designs.
Power: plan solar and a generator.
Demand swings: aid-buyer contracts can smooth early sales.

Strategy & moat

Position (needs-based): serve buyers who need fast, local delivery of affordable carpets and bedding in Afghan designs and sizes.
Trade-offs: mid-price only; no luxury hand-knotted lines here (that is idea 2).
Fit: local designs → short delivery times → wholesaler loyalty → steady runs → lower cost.
Easy to copy (fine at first): the tufting machine; it is widely available.

Sources: “Afghanistan Net Export Value Creation” page 4 (1C world markets: tufted carpets 5703, wadding 5601); CEPII BACI v202601 (2024: tufted carpet imports 570330, $3.2M, 97% from Uzbekistan); UN Afghanistan Returnees Overview (2.6M returns Jan–Nov 2025). Capital indicative.

Carpet founders can start with the exporters' union and Turkish buyers, who have already said they want to work with Afghan producers directly.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Afghanistan Carpet Producers and Exporters Union, and ACCI's new carpet committee** The union reports carpets sold to 37 countries in 2025 and says washing and finishing now happen at home. Meet it at ACCI in Kabul.	Where are washing and finishing slow, poor, or expensive? Which exporters would send carpets to a new hub?	There is enough unmet demand for washing and finishing to fill a hub.
Weeks 2–6	**Istanbul Carpet Exporters Association** Its president visited Kabul in May 2025 and offered support; it has about 500 members. Ask the Afghan union, which invited them, for the contact.	Would members buy finished Afghan carpets directly, and share washing know-how?	Turkish buyers will order finished carpets from Afghanistan instead of via Pakistan.
Weeks 4–8	**Aqcha carpet park (Jawzjan) and Herat Bakhtar Carpet Company** Aqcha is a weaving center where many weavers are women working at home. Herat Bakhtar ($5M plant, 3,500–4,000 m² a day) shows the machine-made market for idea 3.	What do weavers earn per square meter today, and would they weave to a buyer's design for more?	A direct brand can pay weavers more and still earn a margin.
Weeks 8–12	**DOMOTEX Hannover (January) and DOMOTEX Middle East (Dubai)** The union organizes Afghan participation; ask to share a stand.	Meetings with 10 importers; a trial order for a small direct collection.	Foreign importers will buy under an Afghan label.

By day 90 you should know: whether exporters will pay for finishing, whether Turkish or Gulf buyers order direct, and what weavers need to switch. Then rent washing space and run one batch.

Sources: Atlas Press (2026) Carpet Union exports; Pajhwok (May 2025) Istanbul Carpet Exporters Association visit; ACCI (carpet committee); Amu TV (Pakistan resale); UNDP Private Sector Mapping (2025) Aqcha park; DOMOTEX.

Sector 5: millions of returning Afghans need homes, which can be built with Afghan stone and locally made windows, radiators, and other building products.

Returnees, Jan–Nov 2025	Cement imports (2024)	Marble reserves	Stone exports vs. potential
2.6M	$85M, 93% from Pakistan	1.3B t, 400+ varieties	$9M vs. ~$60M

Products from "Afghanistan Net Export Value Creation", and the founder test

Product	6-digit code	Page	Why it passed	Founder-feasible	Becomes idea
Marble & decorative stone	680291 / 251512	added	RCA 13; UNDP: $50M export gap	✓	1 Stone processing
Insulating glass units	700800	1C	$2.4B world market, nearby	✓	2 Insulated windows
Central-heating radiators	7322	1C	$3.8B world market, nearby	✓	3 Radiators & castings
Cast iron & steel articles	7325	1C	$6.7B world market, nearby	✓	3 Radiators & castings
Plastic baths & sanitary ware	3922	1C	$5.3B world market, nearby	✗	All resin imported (slide 4)
Portland cement	252329	2	$85M import bill; Medium	✗	Needs a large plant

"Added" row: marble is already competitive (RCA 13) and the UNDP mapping flags a ~$50M export gap, but it was not on the pages of "Afghanistan Net Export Value Creation".

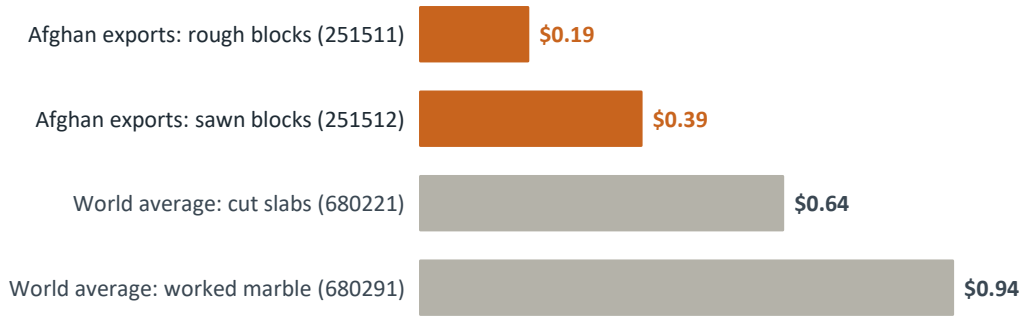
Result: 3 business ideas

1. **Marble & stone processing**
   Cut and polish Afghan marble into slabs and tiles instead of selling rough blocks.
2. **Insulated windows**
   Assemble double-glazed units and aluminum or uPVC frames for new homes.
3. **Radiators & castings**
   Steel and cast-iron radiators, stoves, and castings from local scrap.

Sources: UN Afghanistan Returnees Overview (returns, Jan–Nov 2025); CEPII BACI v202601 (2024 cement imports); UNDP Private Sector Mapping in Afghanistan (2025: marble reserves, stone export gap); Growth Lab Atlas (RCA); "Afghanistan Net Export Value Creation" pages 4–5.

Afghan marble leaves as rough blocks for under $0.40/kg; cut and polished stone sells for more than twice that, so the cutting and polishing should happen here.

Marble, price per kg (2024)



Pakistan, Italy, China, and India buy Afghan blocks, then cut and sell the slabs. 14 marble factories in Herat's industrial park already export to China, Iran, and the UAE.

The business

What you sell: polished slabs, floor and wall tiles, and cut-to-size stone for builders.
Customers: Afghan housing and mosque builders first; then Central Asia and the Gulf.
Passes the raw-material test: cutting leaves the waste at home, so slabs are cheaper to ship per useful m² than blocks.
Start-up capital: $0.5–1.0M for a block cutter and polishing line (indicative).
Time to revenue: 6–9 months.

Strategy & moat

Position (variety-based): rare Afghan colors (onyx, white, green) sold as named collections with consistent finish.
Trade-offs: do not sell rough blocks; focus on a few premium stones.
Fit: quarry supply contracts → modern cutting → consistent finish → architects specify the stone → repeat projects.
Easy to copy (fine at first): the saws and polishers; competitors can buy the same.

Main risks & how to manage them

Quarry access: concessions are politically allocated; partner with licensed quarry owners.
Power: cutting is power-hungry; site in Herat park with better grid access.
Heavy freight: sell regionally first; rail to Central Asia where possible.
Quality: train cutters; inspect every slab.

Sources: CEPII BACI v202601 (2024 Afghan export unit values 251511, 251512; world unit values 680221, 680291); UNDP Private Sector Mapping (2025: Herat marble factories, 1.3B t reserves, Dara-e-Noor Turkish lease, stone export gap). Capital indicative.

New homes need insulated windows, and they are cheaper to assemble in Afghanistan than to import.

$2.4B
world market for insulating glass units, growing 3.2% a year (1C)

$6.2B
world market for aluminum window and door structures

3M
residents planned for Kabul New City

2.9M
Afghans returned in 2025 and need housing

The business

What you sell: double-glazed units and finished windows and doors, installed.
Customers: housing developers, builders, families extending homes, schools, and clinics.
Why local: glass units are bulky and fragile to import assembled; local assembly is protected by freight cost.

What it takes to start

Equipment: glass cutting table, spacer and sealing line, frame saws, and crimpers.
Capital: $0.3–0.6M (indicative).
Inputs: float glass and profiles imported from Iran, Türkiye, China, or Uzbekistan.
Skills: installers; a technician trained by the machine supplier.
Time to revenue: 3–6 months.

Main risks & how to manage them

Imported inputs: keep two glass suppliers on different routes.
Construction slump: UNDP records four straight years of contraction (2020–24); target returnee housing and public buildings.
Installation quality: train and certify installers.
Payment delays: take deposits.

Strategy & moat

Position (needs-based): serve builders who need windows delivered and installed fast, in local sizes, with a warranty.
Trade-offs: installed windows only; no glass trading.
Fit: own installers → fewer callbacks → builder referrals → steady orders.
Easy to copy (fine at first): the assembly machines; the installer network and builder relationships are the moat.

Sources: “Afghanistan Net Export Value Creation” page 4 (1C: insulating glass 7008); CEPII BACI v202601 (2024 world trade, aluminum structures 761010); Ministry of Urban Development and Housing (2024: Kabul New City, ~3M residents); UNDP Private Sector Mapping (2025: construction contraction); UNHCR (2.9M returns in 2025). Capital indicative.

Radiators and metal castings build on skills Afghan workshops already have, and every new home needs heating, which today mostly means burning coal and wood in old stoves.

Scrap steel & iron
collected locally
cheap, abundant input

›

Foundry / press
induction furnace or sheet press
the key equipment

›

Make
radiators, stoves, manhole covers, fittings
heavy goods: costly to import

›

Test & finish
pressure test, paint
warranty matters

›

Sell
builders, households, municipalities
home market first

What the data says

Nearby products: central-heating radiators ($3.8B world market) and cast-iron articles ($6.7B) were both top-scoring new exports on "Afghanistan Net Export Value Creation".
Know-how exists: Kabul workshops already make tin stoves, and Kabul Folad Steel operates in Herat's industrial park.
Heat demand: winter heating today relies on coal and wood stoves; Afghanistan exports $71M of coal.
Raw material: scrap is local and heavy finished goods are expensive to truck in.

The business

What you sell: steel panel radiators, efficient stoves, castings (manhole covers, pipe fittings).
Customers: builders and developers, households, municipalities.
Start-up capital: $0.3–0.8M (indicative).
Time to revenue: 6–9 months.

Strategy & moat

Position (needs-based): serve builders who need reliable, pressure-tested heating products delivered on time with a warranty.
Trade-offs: a narrow range of standard sizes; no custom one-offs.
Fit: scrap contracts → steady furnace runs → tested products → builder trust → volume.
Easy to copy (fine at first): the furnace itself.

Main risks & how to manage them

Power: induction furnaces need heavy power; site where the grid is strongest, add solar.
Scrap supply: contract scrap dealers; pay on delivery.
Quality: pressure-test every radiator.
Imports: Turkish radiators are strong; compete on price and delivery.

Sources: "Afghanistan Net Export Value Creation" page 4 (1C: radiators 7322, cast-iron articles 7325); UNDP Private Sector Mapping (2025: Kabul Folad Steel in Herat Industrial Park); Arab News (2025: Kabul tin-stove workshops); Growth Lab Atlas (2024 coal exports, 2701). Capital indicative.

In building materials, 45 stone factories in Herat and the first stone shipment to the United States show where a founder can start, and which buyers and chambers to call first.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Herat Chamber of Industries and Mines** Head: Mohammad Naser Amin. 45 decorative-stone factories work in Herat Industrial Park, among them Doost Marble and the plant of Akram Najibi. Ask the chamber for introductions.	Which plants have idle cutting and polishing lines? Do you get the best blocks, or are they sold raw to Iran?	A founder can rent or share an existing line instead of buying machines, and secure good blocks.
Weeks 2–8	**Stone buyers abroad** Afghan stone went to the US for the first time in July 2026 ($100,000). Main buyers are Pakistan, Italy, China, and India. Meet them at Marmomac (Verona, September) or the Xiamen Stone Fair (March).	Sample orders for polished slabs and tiles in sizes buyers use.	Buyers will pay the processed price for Afghan stone if quality and size are right.
Weeks 4–10	**UNHCR, IOM, and Kabul builders** UNHCR and IOM build shelters for families returned from Iran and Pakistan; their tenders are listed on ungm.org.	How many windows and radiators they buy, from where, and at what price.	Local insulated windows and radiators can beat imports on price and delivery time.
Weeks 6–12	**Park managers and DABS** Ask about reliable power for cutting lines and furnaces (see big bet A).	Hours of power per day and cost per kWh in each park.	Power cost does not kill the margin.

By day 90 you should know: the price gap between raw and polished stone, a source of good blocks, and power cost per unit. Then run one container of polished stone.

Sources: Pajhwok (Jul 2026) Herat stone factories; Daryo (Jul 2026) first stone shipment to the US; “Afghanistan Net Export Value Creation” (stone buyers, BACI 2024); UNDP Private Sector Mapping (2025).

Big bets · Beyond the four-test method

The sector ideas are small steps; three big bets could help every Afghan business at once.

Afghanistan has few capabilities and few nearby products to jump to. Countries in that position cannot rely on short jumps alone: they also need a few strategic bets that remove a constraint for many firms at once. These bets are longer-term and riskier, so they are run as portfolios of small, cheap experiments that each reveal what is missing.

A Energy

Power is the hurdle named on almost every sector page. Factories get about 12 hours a day; 80% of electricity is imported.

Unlocks: Mills, cold storage, finishing, foundries, extract plants

B Transit & trade hub

Pakistan's border has been shut since October 2025. Trade has moved to Central Asia and Iran; the cold chain is missing.

Unlocks: Fresh and dried fruit, stone, carpets; Central Asian transit

C People as exports

5–6M Afghans live abroad and 2.9M returned in 2025. Skills, remittances, and diaspora networks are under-used.

Unlocks: Every sector: founders, buyers, know-how, capital

Each bet is laid out the same way: 1 the prize and the seed · 2 the hurdles, tested · 3 the first businesses · 4 who to contact first · 5 the path, with stop signals · 6 the learning engine. The path follows the Exporters Without Borders playbook: find the gap, back a founder, fund a cheap pilot, connect buyers and capital, hand off to investors.

Framework: Harvard Growth Lab, "strategic bets" for countries with low complexity and few nearby products; Exporters Without Borders (2026). Figures: DABS (2025); NPR (2026); UNDP (2025); UNHCR (2026).

Big bet A: Afghanistan imports 80% of its electricity, yet it has some of the strongest sunshine in the region, and firms already spend ~$190M a year on their own power equipment.

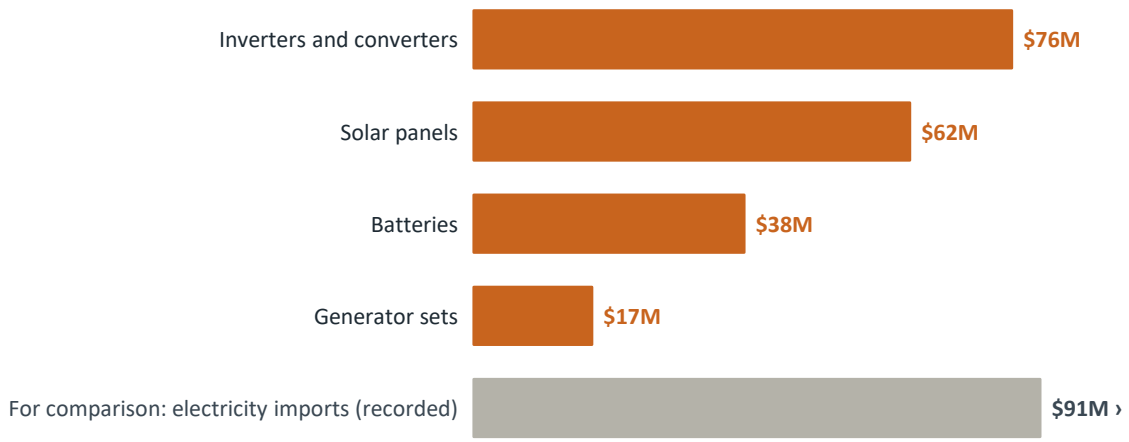
80%
of electricity is imported, mainly from Uzbekistan, Tajikistan, Turkmenistan, and Iran

~250 MW
made at home vs. ~800 MW imported; demand is ~1,500 MW

40%
of people get power from the grid

12 h/day
power for industrial towns; Kabul faces long daily cuts

Afghans already spend ~$190M a year working around the grid



Afghan imports, $M, 2024 (partner-reported). DABS puts the full cost of imported power at $250–280M a year. The equipment bill shows homes and firms already paying for their own power: a market waiting for better, financed solutions.

The seed: why Afghanistan could win this

Sun: about 300 sunny days a year and 6.5 kWh/m² a day of solar radiation, among the best in the region.
Potential: 222,000 MW of solar, 67,000 MW of wind (Herat–Farah–Nimroz) and 23,000 MW of hydro, mostly untapped.
Momentum: private solar plants now operate near Kabul; DABS has signed deals for hundreds of MW of solar with Afghan firms.
Connections: CASA-1000 is due to start in 2027, adding up to 300 MW and transit fees.

The prize

Replace imports: a $250–280M yearly import bill, paid in scarce dollars.
Power industry: 6,500 factories employing ~450,000 people, plus the mills, cold rooms, and foundries in this deck.
Lower costs: Afghan industry pays $0.096/kWh against $0.01–0.05 in Central Asian neighbors.
New capabilities: installation, grid services, and equipment assembly skills that other industries can reuse.

Sources: Daryo (Nov 2025) and Pajhwok (Jul 2025): 80% imported, 40% grid access; Times of Central Asia (Aug 2025): ~250 MW / ~800 MW, $250–280M; Kun.uz (demand ~1,500 MW); Pajhwok (Nov 2025, 12 h); CEPII BACI v202601 (2024 equipment imports); World Bank (2018) solar resource; UNDP (2025) potential and tariffs; Xinhua and Pajhwok (2026) private solar deals; Interfax (Apr 2026) CASA-1000; Pajhwok (Aug 2026) factories.

Electricity passes all four tests of a real block to growth; once power is fixed, the next problems are getting paid, a weak grid, and long-term finance.

Four checks for whether a problem is really what holds growth back: if it is, all four should show up in the evidence.

1 Is its price high?

Shows up

Afghan industry pays $0.096/kWh, against $0.01–0.05 in Central Asian neighbors. DABS says its diesel power costs AFN 35/kWh but it sells at AFN 2.5–14, so supply is rationed rather than priced.

2 Do changes in supply move output?

Shows up

When Uzbekistan cut supplies, factory owners in Nangarhar reported about 400 factories closed. Kabul industrial parks have reported only eight hours of power a day.

3 Who thrives, who struggles?

Shows up

Low-power activities (trading, sun-dried fruit, hand-woven carpets) keep growing; power-hungry ones (mills, cold storage, foundries) struggle or run generators. That is the pattern a power constraint predicts.

4 Are people working around it?

Shows up

Yes, at scale: ~$190M a year of solar panels, inverters, batteries, and generators; factories installing their own solar; DABS running diesel plants at a loss.

What blocks next, once this is fixed

Getting paid: DABS sells below cost; private plants that sell to DABS face payment risk. Selling directly to factories avoids this.
The grid: DABS says the grid is poorly built and cannot carry more load; 7–8 provinces are off-grid.
Long-term money: no correspondent banking or SWIFT access makes equipment imports and long loans hard.
Quality: cheap panels and batteries fail early, which erodes trust in solar.

What we do not know yet

Willingness to pay: what will factories pay for guaranteed 24-hour power, and will they sign multi-year contracts?
Real diesel spend: how much do firms actually spend on generators per kWh?
Permission: can a private company sell power to its neighbors inside a park?
Payment record: how reliably has DABS paid existing private plants?

Sources: UNDP Private Sector Mapping (2025): tariffs, off-grid provinces, banking; ANI via Lokmat Times (Aug 2025): DABS cost AFN 35/kWh vs. tariffs AFN 2.5–14; Amu TV (factory closures in Nangarhar); TOLOnews (8 hours in Kabul parks); CEPII BACI v202601 (2024); UNDP (2025) solar-powered paper factory; Pajhwok (Nov 2025) grid structure. Four tests: Harvard Growth Lab growth diagnostics.

So the energy bet starts with small power businesses that sell to factories, not with giant power plants.

Each venture earns revenue on its own and teaches the next one something. Gray rows are later-stage, once earlier ventures prove the model.

#	Business	First customers	Start capital	First revenue	"Labor plus one": the extra edge
1	**Factory solar + battery "power as a service"** Install, own, and operate solar with batteries inside a factory; sell the power by the kWh.	Factories in the 11 operating industrial parks (34 planned or built)	$0.3–1M per MW (indicative)	6–12 months	Cuts diesel bills by selling below generator cost; no reliance on DABS payments
2	**Solar cold rooms** Off-grid cold storage for fruit traders and farmer groups.	Traders and orchards near Kabul, Herat, Kandahar	$50–150k per room (indicative)	One harvest	Pays for itself by ending harvest-time fire sales (links to big bet B)
3	**Bazaar and town mini-grids** Solar-battery grids selling power to shops and workshops in off-grid districts.	Shops, mills, and clinics in the 7–8 off-grid provinces	$0.2–0.5M (indicative)	~12 months	Prepaid mobile meters; customers already pay more for generator power
4	**Installer academy & after-sales** Train, certify, and equip installers; sell quality-tested kits with a warranty.	Households, installers, ventures 1–3	$50–100k	3–6 months	Fixes the quality problem that hurts every solar business
5	**Grid-scale plants (10–100 MW)** Solar, wind, or small hydro selling to DABS or industrial zones.	DABS; park power companies	$10–80M, investor-financed	3+ years	Only after ventures 1–4 build a track record

Where to start: venture 1 in one industrial park. Power-hungry factories are easy to find, the saving is measurable from day one, and the contract does not depend on DABS paying. Ventures 2 and 4 support sectors 1, 2, and 4 directly.

Sources: UNDP Private Sector Mapping (2025): 34 industrial parks, 11 operating; 7–8 off-grid provinces; park-level power proposals. "Labor plus one": Exporters Without Borders screening test (low labor cost plus a second advantage). Capital indicative.

The first energy venture needs six relationships, and each one tests a part of the plan.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Factory owners in industrial parks** About 600 factories sit in Kabul's parks alone. Start where private solar is already being planned: Hisar-e-Shahi (Nangarhar), Mohammad Agha (Logar), Kabul Green Industrial Park. Reach owners through the Afghanistan Chamber of Industries and Mines.	Diesel bills for the last 12 months; a letter of intent to buy power below that cost.	Factories pay more for diesel than solar with batteries would cost them.
Weeks 2–6	**DABS and the Ministry of Energy and Water** DABS has started 15 solar projects (721 MW) and signed deals with private firms. Ask for a meeting through the chamber or a park administration.	A written answer: may a private firm sell power to factories inside a park? On what terms can it connect to the grid?	Selling power privately is legal and will stay legal.
Weeks 2–6	**Pamir Energy (Aga Khan Fund for Economic Development)** Already sells Tajik hydropower across the border to about 41,000 people in Afghan Badakhshan, and has been invited to copy its model there.	Share its contracts, billing, and how it collects payment; consider a joint pilot.	A private power company can collect payments and run safely in Afghanistan.
Weeks 4–8	**Afghanistan Renewable Energy Union and Kabul's solar market** The union of solar firms works with the standards authority (ANSA). Visit the solar bazaar in Kabul.	List of trusted installers; real prices for panels, batteries, and inverters.	Good local installers exist and equipment can be bought at a known price.
Weeks 6–12	**First money: UNDP, Aga Khan Foundation, development lenders** UNDP has put solar on 30 health centers and 15 schools; IFC piloted pay-as-you-go solar with the mobile operator AWCC.	Grant-like money for the first 1 MW pilot so the price beats diesel from day one.	Funders will pay for a pilot whose results are published.
Ongoing	**Afghan engineers and investors abroad** Engineers at solar firms in Germany, the UAE, and Türkiye; Afghan business councils in Dubai.	A founder for venture 1 and first equity.	Diaspora talent and money will commit when there is a concrete plan.

By day 90 you should know: the true cost of diesel per kWh in 30 factories, whether private sale is allowed, and who will fund the first 1 MW.

Sources: TOLOnews (600 factories in Kabul parks); Pajhwok (Hisar-e-Shahi 40 MW plan); pv magazine (2025) Mohammad Agha; Amu TV (Kabul Green Industrial Park); Xinhua (Feb 2026) DABS 15 projects; AKDN and Oxfam (Pamir Energy); ANSA (2025); UNDP (2023) solarization.

The energy bet can grow from one factory roof to a power company in seven years, if each step proves itself with paying customers before the next one starts.

0 · Learn 0–6 months

Playbook: find a business Afghanistan should have but does not

- **Measure what factories really pay for power.** Put fuel logs and meters on generators in 30 factories in one park. This single number decides the business: if diesel costs near the AFN 35/kWh DABS reports, solar with batteries can undercut it comfortably.
- Lab-test 20 panels and batteries bought in Kabul bazaars.
- **Ask the rule-makers first.** Get a written answer from DABS and the energy ministry on whether a private firm may sell power inside a park.
- Recruit a founder: ideally an Afghan engineer who has built solar projects abroad.

Move on when: 10 factories sign letters of intent at a price below their diesel cost.

1 · Pilot 6–18 months

Playbook: back one founder with a small, cheap pilot

- **Install 1 MW of solar with batteries in one park.** Fund it with grant-like money so the founder can charge less than diesel from the first day, and factories have nothing to lose.
- One standard 5-year contract; monthly payment by mobile money.
- Add one solar cold room for a fruit trader.
- Publish the results, good or bad.

Move on when: factories pay on time for 6 months and save at least 20% against diesel.

2 · Prove 18–36 months

Playbook: connect the business to buyers and investors

- **Repeat the same contract at 10 sites.** Identical contracts can be bundled into one portfolio that a lender can price; this is what turns a pilot into an investable business.
- Start the installer academy, training returnees from Iran.
- First loan from an impact investor or development bank.

Move on when: lenders accept the contract and the cost per MW falls.

3 · Scale 3–7 years

Playbook: hand over to investors and move on

- Power companies that serve whole industrial parks.
- 10–100 MW plants selling to DABS, once its payment record is clear.
- **Make the bulky parts locally.** Mounting frames and battery packs are heavy to import; assembling them here is a natural next business.
- Success is other founders copying the model without help.

Move on when: investors fund new sites without the incubator.

Stop signals (if one appears, pause, publish what went wrong, and move the money): factories will not sign at or below their generator cost; panels and batteries cannot be imported or paid for; the authorities forbid private sale of power; DABS takeovers of private assets. Any of these means pausing, publishing what was learned, and shifting money to ventures that still work.

Cheap tests answer the open questions before large amounts of money are spent.

What we do not know	Cheapest way to find out	Cost & time	What the answer changes
What do factories really pay for power?	Put meters and fuel logs on 20 generators for one month	~$10k · 6 weeks	Sets the price the power-as-a-service venture can charge
Will factories sign multi-year contracts?	Offer a 12-month prepaid power contract to 10 factories	Staff time · 2 months	Shows whether the model can be financed
Will DABS pay private plants on time?	Interview operators of existing private plants (Kabul, Kandahar)	~$2k · 1 month	Decides when grid-scale plants make sense
How bad is bazaar panel quality?	Lab-test 20 panels and batteries bought in Kabul	~$5k · 1 month	Sizes the installer-academy and warranty business
Can private power be sold inside a park?	Ask for a written ruling for one pilot park	Staff time · 3 months	Unlocks or blocks ventures 1 and 3

Who is already working around it

Factories on solar: a UNDP-supported paper recycling factory replaced diesel with solar and cut costs.
Private plants: solar plants built by private firms near Kabul (Surobi) now supply the grid.
First private solar IPP: a 10 MW plant in Kandahar has sold to DABS since 2019.
Households: millions already run solar home systems; installers and sellers exist in every bazaar.

How we measure success

Hours of power: per factory per day, and the cost per kWh against diesel.
Activity crowded in: new sites built by others, installers trained, firms copying the model, not just money spent.
Jobs and output: in factories that gained reliable power.
Lessons published: every failure written up and shared, as Exporters Without Borders does.

Sources: UNDP (Jan 2025) solar paper factory; Xinhua (Feb 2026) Surobi private solar; USAID (2019) Kandahar 10 MW plant, the first private renewable investment; World Bank (2020) energy diaries on solar home systems. Learning approach: Harvard Growth Lab ("you need an organization, not a slide deck"). Costs indicative.

Big bet B: since the Pakistan border closed, trade has moved north and west; Afghanistan can become a trade route between Central Asia, Iran, and South Asia.

Oct 2025
Torkham, Chaman, and other Pakistan crossings shut, still closed in 2026

48% · 46%
of imports now come via Central Asia and via Iran (World Bank, June 2026)

~$13.9B
total Afghan trade in 2025

317,517 t
of fresh fruit exported in 2025, worth ~$142M

Corridors that now carry, or could carry, Afghan trade

Corridor	Status	Note
Torkham / Chaman to Pakistan	**Closed**	shut since October 2025
Hairatan–Mazar rail to Uzbekistan	**Operating**	new terminal opened in 2026
Khaf–Herat rail to Iran	**Operating**	links to the Iranian rail network
Chabahar port, Iran	**Operating**	war risk in 2026
Lapis Lazuli: Turkmenistan to Türkiye	**Operating (road)**	long and costly
Trans-Afghan railway to Pakistan	**Feasibility study**	$4.6–8.2B estimates; UAE joined financing (Oct 2026)
Herat–Mazar railway	**Planned**	Iran-backed talks (2026)

The shift away from Pakistan worked: imports kept flowing. But World Bank monitoring notes route diversification raised transport costs, and perishables suffered most.

The seed: why Afghanistan could win this

Geography: Afghanistan borders six countries; Central Asia needs a southern route to the sea.
A forced experiment: traders already learned new routes through Iran and Central Asia in 2025–26.
Portage-site logic: towns grow where cargo has to change mode (rail to truck, warm to cold); Hairatan, Herat, and Kabul are those points.
Neighbors investing: Uzbekistan, Iran, and now the UAE are putting money into rail links through Afghanistan.

The prize

Stop the losses: traders say over half of perishable produce spoiled or sold cheaply during closures.
Earn from transit: handling, storage, and forwarding fees on Central Asia–South Asia trade.
Lower costs for every exporter: fruit, stone, carpets, and spices in this deck.
New capabilities: cold chain, logistics IT, and customs know-how reusable across industries.

Sources: NPR (Feb 2026) and Express Tribune (Feb 2026) border closures; World Bank data via Arab News Pakistan (June 2026); The Friday Times citing Reuters (2025 trade ~$13.9B); FreshPlaza (2025 fruit exports); Trend, Daryo, Interfax, Eurasianet (2026) on the Trans-Afghan railway; UNDP (2025) corridors; World Bank Afghanistan Economic Monitor (Jan 2026) on route costs; Hasht-e-Subh (Nov 2025) losses.

Missing cold storage and unreliable routes pass all four tests; once they are fixed, visas, banking, and regional conflict are the next problems to solve.

Four checks for whether a problem is really what holds growth back: if it is, all four should show up in the evidence.

1 Is its price high?

Shows up

Private cold storage is so expensive that growers sell at harvest; one grower got AFN 4,000 for grapes that fetched AFN 20,000–30,000 when routes were open. Trade-fair stands cost $15–20k.

2 Do changes move output?

Shows up

When Pakistan's crossings shut in October 2025, perishable exports collapsed and fruit prices fell; dried goods kept moving.

3 Who thrives, who struggles?

Shows up

Light, dry, high-value goods (saffron, nuts, hing) travel by air or long routes; perishables and heavy goods (fresh fruit, stone) suffer. The pattern points to logistics.

4 Are people working around it?

Shows up

Traders rerouted through Chabahar and Central Asia, used air cargo and natural cold stores in the Salang pass. Uzbekistan opened a new terminal at Hairatan in 2026.

What blocks next, once this is fixed

Visas and travel: Afghan traders struggle to get visas to meet buyers (UNDP Herat visit).
Banking: no SWIFT access; payments run through hawala and Gulf partners.
Regional conflict: the 2026 Iran war and Pakistan airstrikes put routes at risk.
Rail breaks: gauge changes and transshipment at Hairatan add cost and time.

What we do not know yet

Price for cold storage: what will traders pay per ton per month, and for how long do they store?
Real route costs: door-to-door cost and days via Hairatan, Herat–Iran, and Chabahar.
Transit demand: would Uzbek and Kazakh shippers use Afghan dry ports and forwarders?
Rules: can bonded warehouses and free zones operate inside industrial parks?

Sources: FreshPlaza (2026) grape prices; UNDP Private Sector Mapping (2025): trade-fair costs, Herat visa problems, Salang natural cold storage, bonded warehouses; World Bank Afghanistan Economic Monitor (Oct 2025, Jan 2026); Daryo (May 2026) Hairatan terminal; Modern Diplomacy (Nov 2026) regional conflict; Oilprice (2026) Iran war context.

The trade-hub bet should start with cold stores and transport services that earn money from the first harvest, not with a large dry port that needs years of traffic to pay off.

Each venture solves a problem traders face today. Gray rows come later, once routes and early ventures are proven.

#	Business	First customers	Start capital	First revenue	"Labor plus one": the extra edge
1	**Cold storage & packhouse** Pre-cooling, sorting, packing, and cold storage near orchards and border crossings.	Fruit traders and growers near Kabul, Herat, Kandahar	$0.3–1M (indicative)	One season	Stops fire sales at harvest; links to sector 1 (packing house) and big bet A (solar cold rooms)
2	**Refrigerated trucking & consolidation** Small reefer fleet collecting from many growers for Central Asia and Iran.	Fresh-fruit exporters	$0.2–0.5M for 3–5 trucks	~3 months	Lets small growers reach buyers without their own trucks
3	**Freight forwarding & digital customs** Book routes, handle TIR and customs papers, and track shipments.	Importers and exporters, diaspora traders	$50–200k	Months	Knowledge of new routes is scarce and valuable right now
4	**Bonded warehouse & dry-port services** Storage, consolidation, and customs inside a park at Hairatan, Aqina, or Herat.	Afghan, Uzbek, and Kazakh traders	$0.5–2M (indicative)	1–2 years	Earns transit fees as Central Asian trade grows
5	**Logistics zone on the new rail lines** Transshipment and processing where the Trans-Afghan or Herat–Mazar railways meet roads.	Regional shippers	Investor-financed	5+ years	Only once rail links are funded and built

Where to start: a cold store and packhouse near one fruit hub, run with five to ten traders who commit volume before building. It pays from the first harvest and feeds the packing-house idea in sector 1.

Sources: UNDP Private Sector Mapping (2025): dry ports (Aqina, Hairatan, Torkham), cold chain, and bonded warehouses; FreshPlaza (2025–26) cold storage shortages; Trend and Daryo (2026) rail projects

The hub can start with fruit unions, cold rooms that already exist in Termez and Kabul, and Afghan traders in Dubai who have money and want storage for their own goods.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Fresh Fruit Exporters Union (Herat, Kabul) and Kandahar Fresh Fruits Union** Afghanistan exported 317,500 t of fresh fruit in 2025, and the unions say lack of cold storage is the main problem. The Herat union has offered to buy railway wagons for fruit.	Written volume commitments for a first season of storage; what fee per ton per month they would pay.	Traders will commit fruit and pay storage fees before the store is built.
Weeks 2–6	**Termez International Trade Center (Uzbekistan)** Afghan traders pay no tax there and can stay 15 days without a visa; 40% of the space is reserved for Afghans. Uzbekistan offered cold rooms and packing for Afghan fruit until Afghanistan builds its own.	Rent cold rooms or space for a pilot; prices for packing and forwarding to Kazakhstan and Russia.	Fruit stored and packed in Termez reaches northern buyers at a profit.
Weeks 2–6	**Owner of Kabul's largest private cold store** A 5,000 t store built for about $5M. Ask the Fresh Fruit Exporters Union for the contact.	How full is it through the year? What do traders pay? Would you partner on a second site?	Storage fees cover costs, and the best location is known.
Weeks 4–8	**Association of Afghanistan Freight Forwarding Companies (AAFFCO) and Pamir Horizon** AAFFCO sits on the regional forwarders' board; Pamir Horizon has offices in Kabul, Hairatan, Islam Qala, and Nangarhar. Termez Cargo Center, a UN-approved hub, is 2 km past the border.	Prices and days for refrigerated trucks to Tashkent, Almaty, and Moscow.	Refrigerated transport north is affordable and reliable enough.
Weeks 6–12	**Afghan traders abroad** Afghan Business Council in the UAE and the Afghanistan International Trade Council (Dubai); exporters have publicly asked them to invest in cold storage at home.	Co-investment in the first cold store in return for equity and first use of space.	Traders abroad will put in money when they also get storage for their own goods.

By day 90 you should know: how much fruit is committed, the storage fee traders will pay, and the cost per ton to reach Almaty. Then rent a 500 t store for one season.

Sources: FreshPlaza (2026) fruit exports and cold storage; Pajhwok (May 2026) Herat union wagons; VOA and Daryo (2024) Termez center; TCA (Termez cold rooms); MENAFN (2024) Kabul 5,000 t store; UNHCR (2025) Termez Cargo Center; ACCI archive.

The trade-hub bet can grow from one cold store into a regional hub as the new railways are built.

0 · Learn 0–6 months

Playbook: find a business Afghanistan should have but does not

- **Measure the losses.** Weigh how much fruit spoils or is sold cheaply in one fruit hub through a season, and what traders would pay to store it. This sets the size and price of the first store.
- Ship one test load each via Hairatan, Herat–Iran, and Chabahar; record cost and days.
- Interview 30 Uzbek and Kazakh freight forwarders about using Afghan routes.
- Recruit a founder from the Afghan trading community abroad.

Move on when: 10 traders commit volume in writing.

1 · Pilot 6–18 months

Playbook: back one founder with a small, cheap pilot

- **Rent or build a 500 t cold store and run one season.** Only with traders who committed volume beforehand, so the store is full from the start.
- Open a small freight-forwarding desk.
- **Publish real route costs.** Traders lack this information today; sharing it builds trust and brings customers.

Move on when: the store is at least 70% full and traders sign up again.

2 · Prove 18–36 months

Playbook: connect the business to buyers and investors

- Open a second cold store at a border hub.
- **Run refrigerated trucks to Tashkent and Almaty.** Regular weekly trips matter more than size: buyers pay for reliability.
- Test a bonded warehouse inside an industrial park.
- Take a first investor loan.

Move on when: regular paying shipments run on two routes.

3 · Scale 3–7 years

Playbook: hand over to investors and move on

- **Offer dry-port services at Hairatan or Herat.** Storage, sorting, and customs for traders from Uzbekistan and Kazakhstan, earning transit fees.
- Build a logistics zone where the new railways meet the roads.
- Others copy the cold-store model across fruit regions.

Move on when: investors fund new sites without the incubator.

Stop signals (if one appears, pause, publish what went wrong, and move the money): cold stores stay under half full for a season; corridors close repeatedly with no alternative; bonded zones are refused; costs on new routes stay above what buyers pay. Pause, publish, and shift to the routes and services that work.

Path structure follows the Exporters Without Borders operating model (2026). Timings and milestones are indicative.

Test shipments and a trial cold store show the real costs before anyone builds a large dry port.

What we do not know	Cheapest way to find out	Cost & time	What the answer changes
What will traders pay for cold storage?	Rent a 200 t cold room for one season and sell space to 10 traders	~$30k · one season	Sets the price and size of the first purpose-built store
What does each route really cost?	Ship one refrigerated load each via Hairatan, Herat–Iran, and Chabahar	~$25k · 2 months	Picks the corridor for the first trucking venture
Would Central Asian shippers use Afghan services?	Survey 30 forwarders in Tashkent and Almaty; offer a trial rate	~$5k · 1 month	Decides whether dry-port services are worth it
How much fruit is lost after harvest?	Weigh losses at 20 orchards and 10 traders through one season	~$8k · one season	Sizes the cold-chain prize for investors
Can bonded zones run in parks?	Request a written ruling for one park	Staff time · 3 months	Unlocks or blocks venture 4

Who is already working around it

Natural cold stores: traders already use the cold of the Salang pass to keep produce.
Route switchers: exporters moved to Chabahar, Central Asia, and air cargo within months of the closure.
New terminals: Uzbekistan and Afghanistan opened a new port terminal on the Hairatan–Mazar line in 2026.
Small processors: women-led drying and packing groups already add value at village level.

How we measure success

Spoilage and price: losses after harvest and farm-gate prices at harvest time.
Days and dollars: door-to-door time and cost per ton on each corridor.
Activity crowded in: new cold stores and forwarders opened by others.
Transit volumes: tons handled for Central Asian and Afghan clients.

Sources: UNDP (2025) Salang natural cold storage; Arab News Pakistan (2026) route shifts; Daryo (May 2026) Hairatan terminal; ODI (2023) post-harvest field studies. Costs indicative.

Big bet C: Afghanistan's people are its least-used strength: millions abroad and millions returning home.

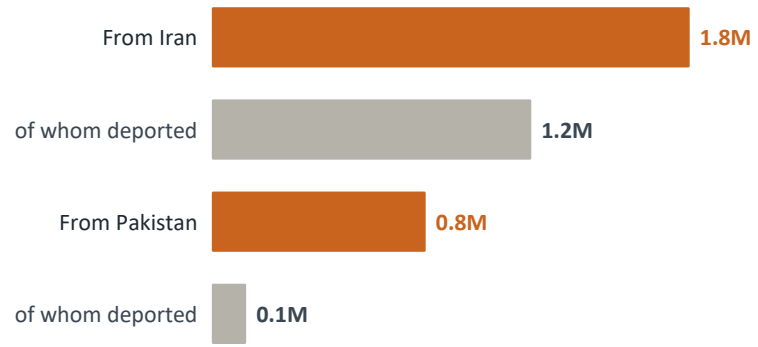
5–6M
Afghans living abroad

2.6M
returned from Iran and Pakistan, Jan–Nov 2025

$5B+
a year flows through informal hawala networks

63%
of the population is under 25

Returns to Afghanistan, Jan–Nov 2025 (millions of people)



Many returnees bring skills learned abroad: construction, tailoring, farming, driving, trades. Research on Albanian and Mexican return migration found that returnees raised local industry growth without lowering local wages.

The seed: why Afghanistan could win this

Demand abroad: Qatar signed the first labor deal (700 jobs, raised to 3,100, plus 1,800 visas for returnees in 22 job types); talks are under way with Saudi Arabia, the UAE, Oman, Türkiye, and Russia.
Online work: young Afghans already sell freelance services to clients abroad.
A diaspora with know-how: engineers, doctors, traders, and managers across the Gulf, Europe, North America, and Central Asia.
Phones: 70% of people own a mobile phone, a base for digital payments.

The prize

Remittances as exports: like the Philippines, earnings sent home pay for imports the economy needs.
Know-how flowing back: diaspora and returnees carry skills that are hard to learn any other way.
Founders and capital: diaspora entrepreneurs know both the local context and foreign markets.
Jobs at home: placing, training, and serving workers abroad creates firms in Afghanistan.

Sources: UNDP Private Sector Mapping (2025): 5–6M abroad, $5B+ hawala, 63% under 25, 70% mobile ownership; UN Afghanistan Returnees Overview, IOM and UNHCR (returns Jan–Nov 2025: 1.80M from Iran, 0.80M from Pakistan); UNHCR one-year recap (2.9M in 2025); Arab News, Dawn, and AP (2025) Qatar labor deal; AFP via Ahram Online (2025) freelancers. Return-migration evidence: Hausmann & Nedelkoska (Albania); Diodato (Mexico), Harvard Growth Lab.

Workers lack skills that employers abroad recognize and safe ways to find jobs; after that, internet shutdowns and banking are the next problems.

Four checks for whether a problem is really what holds growth back: if it is, all four should show up in the evidence.

1 Is its price high?

Shows up

Sending money through hawala costs more than formal banking (UNDP), and migrants without recognized skills tend to land the lowest-paid jobs abroad.

2 Do changes move output?

Partly

When millions were deported in 2025, families lost the money relatives sent home (World Vision, 2026). The link between jobs abroad and income at home is direct.

3 Who thrives, who struggles?

Shows up

Workers with recognized skills placed through formal channels earn far more than unskilled, undocumented migrants who are deported first.

4 Are people working around it?

Shows up

Yes. Young freelancers keep selling services online through VPNs and satellite links; families pool savings to send one member abroad; money comes home through hawala because banks cannot do it.

What blocks next, once this is fixed

Internet shutdowns: a nationwide blackout of about 48 hours in Sept–Oct 2025 and a fiber ban in several provinces; online work needs backup links.
Women's work and study: restrictions limit who can train and work; home-based and women-only options are needed.
Payments: no SWIFT access; earnings come home through hawala and Gulf partners.
Passports and visas: slow and costly for many workers.

What we do not know yet

Employer demand: which Gulf, Turkish, or Russian employers will hire Afghans at scale, in which jobs?
Returnee skills: what share of returnees have skills that can be certified quickly?
Online reliability: can a remote-services team deliver to clients through shutdowns?
Ethics: can placement be run with employer-paid fees and no debt for workers?

Sources: UNDP Private Sector Mapping (2025) hawala costs; World Vision (Mar 2026) "Compounding Returns"; UN briefing (Oct 2025), IODA, and HRW (2025) on internet shutdowns; AFP via Ahram Online (2025) freelancers. Four tests: Harvard Growth Lab growth diagnostics.

Employers abroad pay for proof of skill, so the first businesses certify what returnees already know and charge the employer, not the worker, as fair recruitment rules require.

Each venture earns fees from employers or clients, not from workers. Gray rows come later.

#	Business	First customers	Start capital	First revenue	"Labor plus one": the extra edge
1	**Skills-to-jobs placement agency** Train, test, and certify workers to employer standards; place them abroad with employer-paid fees.	Gulf, Turkish, and Central Asian employers (construction, hospitality, driving)	$100–300k (indicative)	6–9 months	Afghan workers plus certified skills and safe, legal placement
2	**Returnee skills bank** Assess and certify returnees' skills; match them to Afghan firms and to venture 1.	Builders, factories, the sector businesses in this deck	$50–150k	3–6 months	Turns returnees from Iran into a known, hireable workforce
3	**Remote-services studio** Bookkeeping, data labeling, design, translation (Dari, Pashto, Farsi) with backup satellite links.	Diaspora businesses and foreign clients	$50–200k	3–6 months	Low cost plus languages and diaspora client networks
4	**Diaspora investment syndicate** Pool diaspora money to co-invest in the incubator's ventures, with regular reporting.	Diaspora professionals and business owners	$30–80k to set up	6–12 months	Brings capital and mentors together
5	**Women-only digital and training hubs** Training and remote work in women-only spaces, as the UNDP mapping proposes for economic zones.	Clients abroad; Afghan firms	Investor-financed	2+ years	Only where rules allow; start small and home-based

Where to start: venture 2 and venture 1 together. Certifying returnees builds the talent pool, and the first employer contracts (for example in Qatar, where a government deal already exists) prove the model.

Sources: Arab News, Dawn, and AP (2025) Qatar labor deal and 22 job categories; UNDP Private Sector Mapping (2025) on women-only zones and home-based digital work.

A placement agency can start from the Qatar agreement that already exists, then add remote work for clients abroad and investment from the Afghan diaspora.

When	Who to contact, and how to reach them	What to ask for	The hypothesis this tests
Weeks 1–4	**Ministry of Labor and Social Affairs** Signed the Qatar deal in 2025: 3,100 workers in the first round and 1,800 more visas for returnees across 22 job types. Placement runs through licensed private Afghan employment firms. Talks continue with Saudi Arabia, the UAE, Oman, Türkiye, and Russia.	How to license a private employment firm; which job types and countries come next.	A new private agency can place workers legally and fairly.
Weeks 2–6	**The private Afghan employment agencies that signed with Qatar** The ministry's foreign-workers department supervises them and holds the list.	Where do placements fail: skills, documents, or medical checks? Would they buy trained, certified candidates from you?	The real bottleneck is skills and certificates, which a training-and-placement business can fix.
Weeks 2–8	**IOM and UNHCR returnee programs** They meet returnees at the Islam Qala and Torkham crossings and record their skills.	Anonymized skills data; help to test and certify returnees.	Many returnees already have skills that employers abroad want.
Weeks 4–10	**Remote-work programs: Aseel and Kiron** Aseel runs a paid remote IT fellowship for 50 Afghan women; Kiron's THRIVE program matched 28% of participants to jobs.	Share trained candidates and clients; co-run the first remote team.	Afghan remote teams can win paying clients abroad.
Weeks 6–12	**Diaspora networks** Afghanistan International Business Council (global), Afghan-American Chamber of Commerce (MoU with ACCI), and the Danish Refugee Council's Afghan Diaspora Engagement program in Europe.	Employers who will hire, and investors for the agency.	Afghan-owned firms abroad will be the first employers.

By day 90 you should know: how to get licensed, where current placements fail, and which three employers will sign letters of intent.

Sources: Arab News, AFP, AP (Jul–Aug 2025) Qatar labor deal; Dawn (2025) talks with other countries; Aseel and ACBAR (2025); Kiron THRIVE Afghanistan; AIBC; ACCI archive (AACC MoU); diasporafordevelopment.eu (DRC program).

The people bet can grow from 20 certified workers into Afghan skills that employers abroad trust.

0 · Learn 0–6 months

Playbook: find a business Afghanistan should have but does not

- **Find out what returnees can already do.** Survey and test 500 returnees from Iran. Many worked on building sites, farms, and workshops there; certifying those skills quickly is the fastest win.
- Meet 20 employers abroad, starting with Afghan-owned firms.
- **Set the ethical rule first.** Employers pay all recruitment fees; workers pay nothing.
- Recruit a founder with recruitment experience.

Move on when: 3 employers sign letters of intent.

1 · Pilot 6–18 months

Playbook: back one founder with a small, cheap pilot

- Train and certify 50 workers.
- **Place 20 with one employer.** Qatar is the natural first market because a government agreement already exists.
- Start a remote-services team of 10 with backup satellite internet.
- Publish outcomes and any complaints.

Move on when: 90% of placed workers are still employed after 6 months.

2 · Prove 18–36 months

Playbook: connect the business to buyers and investors

- Expand to three countries.
- **Open the returnee skills bank to Afghan firms.** The same certificates help Afghan builders and factories hire with confidence.
- Diaspora investors make their first investments.

Move on when: employers order again and the agency covers its costs.

3 · Scale 3–7 years

Playbook: hand over to investors and move on

- Thousands of workers placed each year.
- **Make "Afghan certified" a mark employers ask for.** Like Filipino seafarers or nurses, a trusted skill label raises wages for everyone who carries it.
- The remote-services studio serves many clients.

Move on when: investors and employers pay for growth.

Stop signals (if one appears, pause, publish what went wrong, and move the money): workers end up paying fees or in debt; employers break contracts or abuse workers; repeated internet shutdowns make remote work unreliable; host countries close to Afghan workers. Pause, publish, and fix before growing.

Path structure follows the Exporters Without Borders operating model (2026). Ethical recruitment principle (employer pays) follows ILO and IOM standards. Timings and milestones are indicative.

Small trial placements and skills surveys show which jobs, employers, and skills to focus on.

What we do not know	Cheapest way to find out	Cost & time	What the answer changes
Which skills do returnees bring?	Skills survey and quick trade tests for 500 returnees	~$15k · 2 months	Picks the first trades to train and certify
Which employers will hire at scale?	Pitch 20 employers, starting with diaspora-owned firms	~$10k travel · 3 months	Sets the first destination and job types
Can placement be fee-free for workers?	Run the first 20 placements on employer-paid terms	Pilot budget · 6 months	Proves the ethical model is viable
Can remote work survive shutdowns?	Run a 10-person team with satellite backup for 3 months	~$20k · 3 months	Decides whether to scale the studio
Will the diaspora invest?	Ask 50 diaspora professionals for pledges to one venture	Staff time · 2 months	Sizes the syndicate

Who is already working around it

Freelancers: young Afghans already sell services online despite shutdowns.
Workers abroad: millions found work in Iran and the Gulf through informal networks.
The Qatar deal: thousands applied within days for the first government-backed placements.
Traders abroad: Afghan merchants run businesses from Dubai to Moscow.

How we measure success

Placements that last: workers employed after 6 and 12 months, and their wages.
Money home: formal remittances per worker.
Know-how back: returnees and diaspora who start or join firms at home.
Activity crowded in: other agencies and studios copying the model ethically.

Sources: Dawn and AP (2025) Qatar deal and applications; AFP via Ahram Online (2025) freelancers; UNDP (2025). Learning approach: Harvard Growth Lab. Costs indicative.

Before buying a single machine, a founder should cost the business against the world's cheapest supplier, as Exporters Without Borders did for lychee in Madagascar.

Their example: freeze-dried lychee

The question: can Madagascar make freeze-dried lychee more cheaply than China, the market leader?
The extra advantage: Madagascar grows about 100,000 t a year but exports only about 20,000 t; the rest sells locally for very little. Cheap labor plus cheap surplus fruit is their "labor plus one."
The model: 10 kg of fresh fruit makes 1 kg of product. Machines are paid off over 7 years, power equipment over 10, and solar panels over 25. Two power cases: solar with a backup generator, and biomass.
Honest limits: land, shipping, exchange rates, and politics are left out, and they say so.
The answer: at full scale, from $1/kg more to $14/kg less than China. A small pilot cannot beat China on cost, so it should sell small batches to specialty buyers first.

Read it: exporterswithoutborders.substack.com: "Costing spreadsheets and assumptions"

Do the same for your Afghan idea: one line per cost, with a real Afghan number

Cost line	Where to get the Afghan number
Raw material	Prices from 10 traders, checked against the Kandahar or Herat chamber; note good and bad years.
Yield	How many kg in for 1 kg out. Ask an existing processor (for example Omaid Bahar for fruit) and the machine supplier.
Power	Your own generator fuel log, per kWh, against a solar quote from a member of the Afghanistan Renewable Energy Union.
Labor	Wages paid in the Herat or Kabul industrial parks.
Machines	Quotes from suppliers in Türkiye, China, and Iran, spread over the machine's life.
Testing and packing	Lab fees and certificate costs (ANSA); carton and bag prices.
Transport	A quote from an AAFFCO forwarder to the buyer's city, by the route that is open today.
The competitor	Its price per kg at the buyer's border, from the unit values in "Afghanistan Net Export Value Creation."

How this deck uses Exporters Without Borders

Labor plus one: the raw-material test and sector scorecard (slides 4–6).
Their playbook: find the gap, back one founder, run a cheap pilot, connect buyers and capital, hand over. It shapes every big-bet path.
Costing first: this page. No pilot without a cost sheet.
Publish failures: the learning engine and the incubator.

Source: Exporters Without Borders, "Costing spreadsheets and assumptions" (Technical Note, June 2026) and exporterswithoutborders.com. Their figures are described by the authors as rough and preliminary.

How the incubator works

The incubator itself must keep learning: many small, cheap trials instead of one big plan.

1 Find the gap

Products and bets from "Afghanistan Net Export Value Creation" that should exist in Afghanistan but do not yet.

2 Back a founder

Afghan, diaspora, or returnee entrepreneurs who own one gap each.

3 Fund a cheap pilot

Small, concessional money; a failure costs little and teaches a lot.

4 Connect buyers & capital

Introductions to buyers abroad, suppliers, and lenders that founders cannot reach alone.

5 Hand off

Once a business can raise money on its own, investors take over and the incubator moves on.

Playbook adapted from Exporters Without Borders, which incubates founders to start export industries in low-income countries (first venture: freeze-dried fruit in Madagascar).

Learn like a factory floor

Log every problem: founders report each obstacle they hit (a permit, a power cut, a missing lab test), the way Toyota workers stop the line.
Fix the class of problem: solve it once for all founders, often by asking government for a specific fix.
Publish failures: every venture that stops gets a short public write-up.

A portfolio, not a single bet

Many small bets: 15–20 ventures across the five sectors and three big bets.
Mixed horizons: quick-revenue sector ideas fund patience for the big bets.
Shared services: testing lab, packaging, export documents, and buyer introductions used by all.
Diaspora pipeline: a standing register of diaspora founders, mentors, buyers, and investors.

Measure what is crowded in

Not money disbursed: but businesses started and still running after two years.
Copycats count: new firms entering a sector after a pioneer shows it works.
Exports and imports replaced: in dollars, per product code.
Jobs: including for women and returnees.

Sources: Exporters Without Borders, operating model and "How to start an export boom" (2026); Harvard Growth Lab lectures on high-bandwidth policymaking (Toyota-style problem solving; development banks judged by activity crowded in) and technological diffusion (pioneer firms and spin-offs).