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Afghanistan: Agricultural and Economic Profiles

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Afghanistan: Agricultural and Economic Profiles

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ABSTRACT: This report provides brief overviews of the state of agriculture and economy in Afghanistan. In addition, this report lists available value chain literature for Afghanistan and provides information on donor SME and private sector programs in the province of Herat, Afghanistan.

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Map of Afghanistan



Agricultural Profile of Afghanistan

*Agriculture in Afghanistan*¹

Indicator	2008	2009
Agriculture, value added (% of GDP)	28.5	32.5
Agriculture, value added (% annual growth)	-11.7	49.1
Crop Production Index (1999-2001=100)	167 (2007)	.
Food Production Index (1999-2001=100)	122 (2007)	.
Livestock Production Index (1999-2001=100)	87 (2007)	.
Agricultural Raw Materials Exports (% of merchandise exports)	5.03	7.56
Food Exports (% of merchandise exports)	52.52	54.68
Food Imports (% of merchandise imports)	17.37	18.29

Agricultural Overview

Afghanistan is an agricultural economy; however productivity in the agricultural sector is low, contributing only 37 percent to the GDP.² About 55 percent of households are involved in farming and 68 percent have some type of livestock, 2.3 million out of 3.4 million Afghan households. The 2007/08 National Risk and Vulnerability Assessment (NRVA) indicated that access to land increased by 8 percentage points from the 47 percent reported in the 2005 NRVA. According to this report, 10 percent of Afghan households are engaged in growing opium and there is opium production in 13 out of 34 provinces in Afghanistan. But most of the production occurs in six provinces, with Urozgan and Helmand having the highest proportion of households producing opium, with 82 and 67 percent, respectively. 2007/08 NRVA report mentions that “poppy cultivation is reported by 6 percent of all households and it is the main crop of 12 percent of households using irrigated land in summer.”³

Fertilizer, Pesticide and Herbicide Usage

According to the NRVA 2007/08, about 62 percent of the households who reported cultivation in last summer season (mainly rural households) use fertilizers. However,

¹ USAID Economic Analysis and Data Services (EADS) <http://esdb.eads.usaidallnet.gov/data/country/>

² National Risk and Vulnerability Assessment (Full Report) 2007/2008, A Profile of Afghanistan <http://nrva.cso.gov.af/NRVA%202007-08%20Report.pdf>

³ Summary of the National Risk and Vulnerability Assessment 2007/2008, A Profile of Afghanistan (brochure version) <http://nrva.cso.gov.af/>

only 17 of farmers used pesticides and/or herbicides in the last summer season, “which might adversely affect agriculture production in the country.”⁴

Vulnerabilities of the Agricultural Sector:

- Only ten percent of farming households receive information on agricultural production, and only 15 percent of households with livestock obtain veterinary services.⁵
- In general, farmland is small and productivity is hampered by water shortage, due to poor irrigation systems and lack of rain water, lack of credit, little mechanization, insufficient outreach of agricultural and veterinary extension services, and poor accessibility of markets and communities.⁶
- The Asian Development Bank (ADB) in its 2003 report indicated that Afghanistan suffers from: Inadequate and outdated dryland farming technology, availability of drought-resistant cereal, legume and fodder varieties, fertilizer distribution, inadequate farm power, plant protection against selected major pests, poor on-farm water management, badly damaged horticulture industry, inadequate market knowledge, inappropriate institutions with large members of staff, capacity building and a lack of agricultural credit⁷

Afghanistan’s Agricultural Geography

The 2003 Asian Development Bank report indicates that arable land in Afghanistan is divided into rainfed and irrigated land. Total arable land resources base is about 7.5 Mha, of which 5 Mha is the potential irrigable area. As of the 2003 report, only around 2.6Mha of the potential irrigable land was developed. Also, “the relatively low and variable rainfall regime places a premium on irrigated land. It is estimated that 85 percent of all agricultural output is derived from the irrigated areas.”⁸ The 2003 agricultural report indicates that “the principal output of the irrigated systems is wheat, accounting for about 80 percent of production, and a range of horticultural crops.”⁹ The rainfed areas are located in the Northern provinces and their principal output is cereal production.¹⁰

⁴ Ibid,

⁵ Ibid

⁶ Ibid

⁷ ADB (2003). Rebuilding Agriculture in Afghanistan, p.17

<http://www.cfr.org/afghanistan/nourishing-afghanistans-agricultural-sector/p19478>

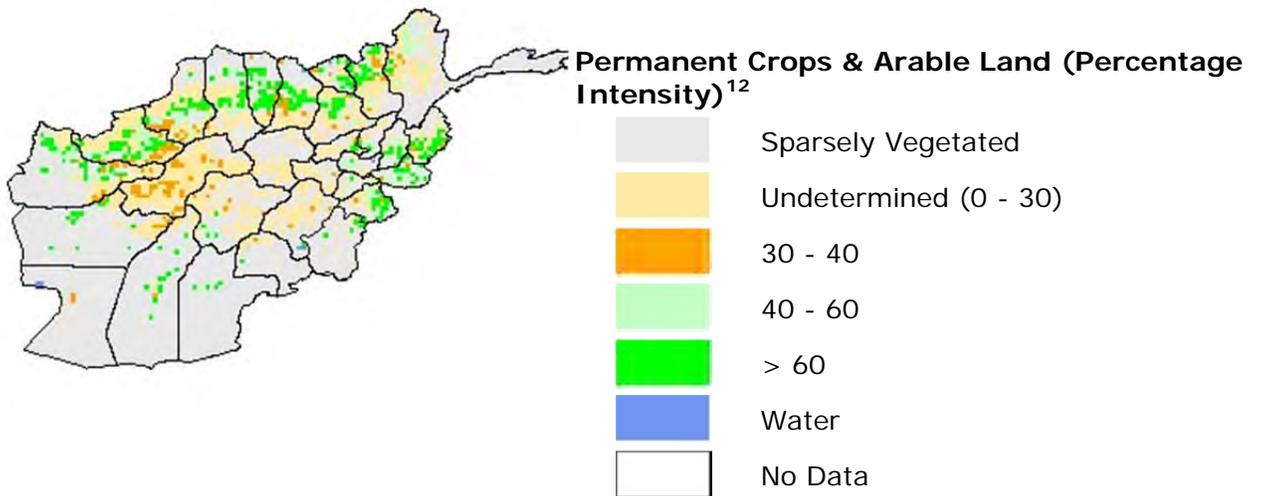
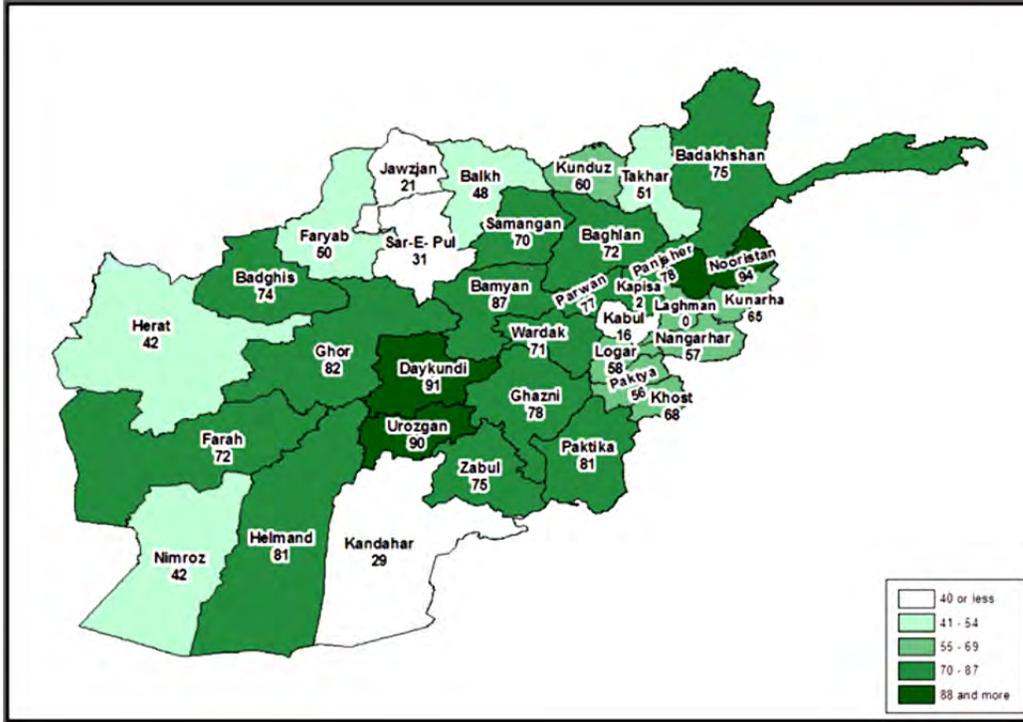
⁸ ADB (2003). Rebuilding Agriculture in Afghanistan

<http://www.cfr.org/afghanistan/nourishing-afghanistans-agricultural-sector/p19478>

⁹ Ibid

¹⁰ Ibid

Percentage of Rural Households with Access to Land, by Province¹¹



¹¹ The National Risk and Vulnerability Assessment (Full Report) 2007/2008, A Profile of Afghanistan, p.42
<http://nrva.cso.gov.af/NRVA%202007-08%20Report.pdf>

¹² FAO Afghanistan Agricultural Maps
<http://www.fao.org/countryprofiles/maps.asp?iso3=AFG&lang=en>

Commodity Overview

The NRVA 2007/08 provides a comprehensive treatment of the agricultural landscape in Afghanistan. The following table provides the three most important crops of households cultivating irrigated land in summer, irrigated land in winter and rain-fed land and garden plots.¹³

Percentage mentioned	Irrigated land in summer	Irrigated land in winter	Rain-fed land	Garden plots
Most	Wheat (77)	Maize/ sorghum (53)	Wheat (94)	Fruit / nut trees (39)
Second most	Opium (12)	Rice (15)	Cotton (1)	Grapes (33)
Third most	Potatoes (3)	Other (10)	Barley (1)	Other (15)

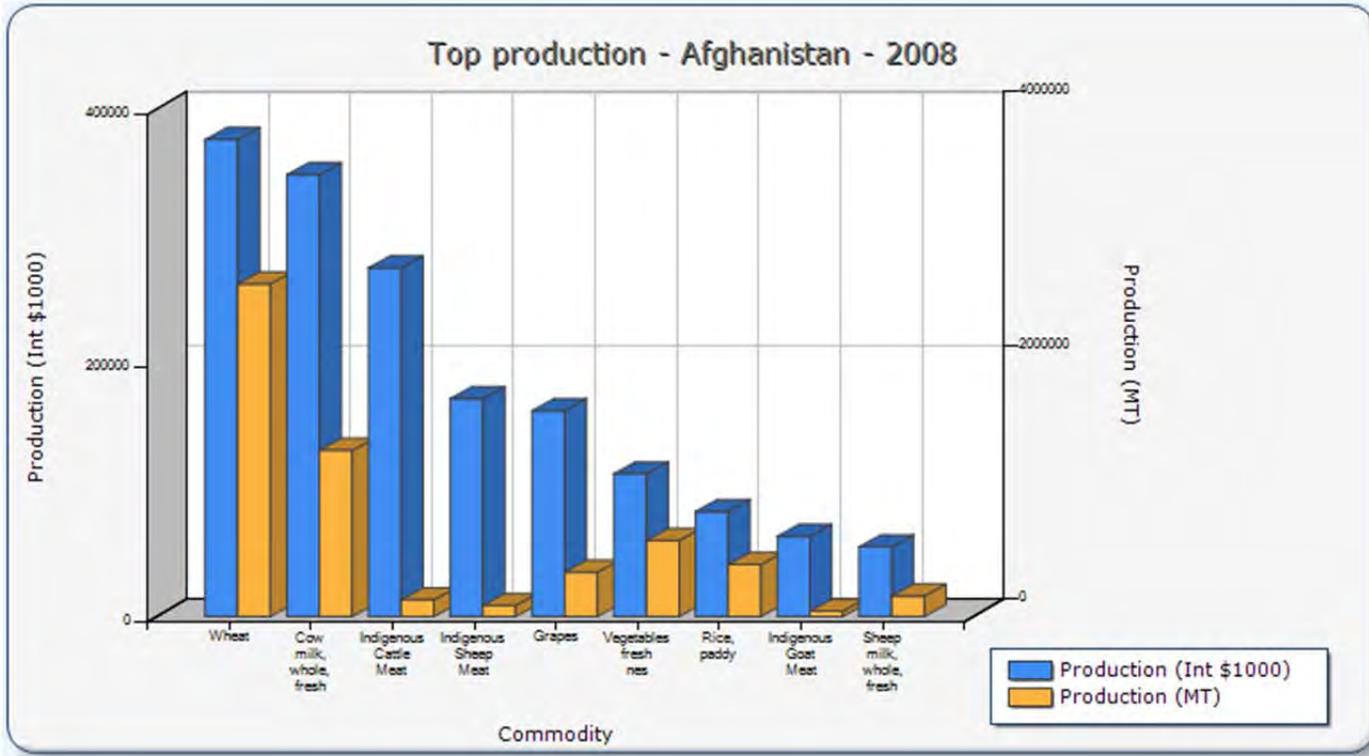
The Food and Agriculture Organization of the United Nations provides the top 20 commodity production in Afghanistan sorted by value and quantity.

Top 20 Commodity Production in Afghanistan—sorted by value¹⁴

¹³ Summary of the National Risk and Vulnerability Assessment 2007/2008, A Profile of Afghanistan (brochure version), p.8

<http://nrva.cso.gov.af/>

¹⁴ FAO STAT <http://faostat.fao.org/site/339/default.aspx>



Rank	Commodity	Production (Int \$1000)	Flag	Production (MT)	Flag
1	Wheat	375989	*	2623000	
2	Cow milk, whole, fresh	348328	*	1309800	
3	Indigenous Cattle Meat	274966	*	132944	Fc
4	Indigenous Sheep Meat	171872	*	86880	Fc
5	Grapes	162365	*	350000	F
6	Vegetables fresh nes	112590	*	600000	F
7	Rice, paddy	82860	*	410000	
8	Indigenous Goat Meat	63338	*	41600	Fc
9	Sheep milk, whole, fresh	54976	*	162000	Fc
10	Almonds, with shell	43872	*	42000	
11	Berries Nes	39153	*	57000	F
12	Potatoes	37713	*	280000	
13	Goat milk, whole, fresh	34002	*	112800	
14	Sesame seed	27683	*	32000	F
15	Cotton lint	27462	*	18500	*
16	Indigenous Chicken Meat	24185	*	20735	Fc
17	Barley	23338	*	333000	
18	Maize	22216	*	280000	
19	Watermelons	20854	*	200000	
20	Wool, greasy	16170	*	9600	F

*: Unofficial figure

[]: Official data

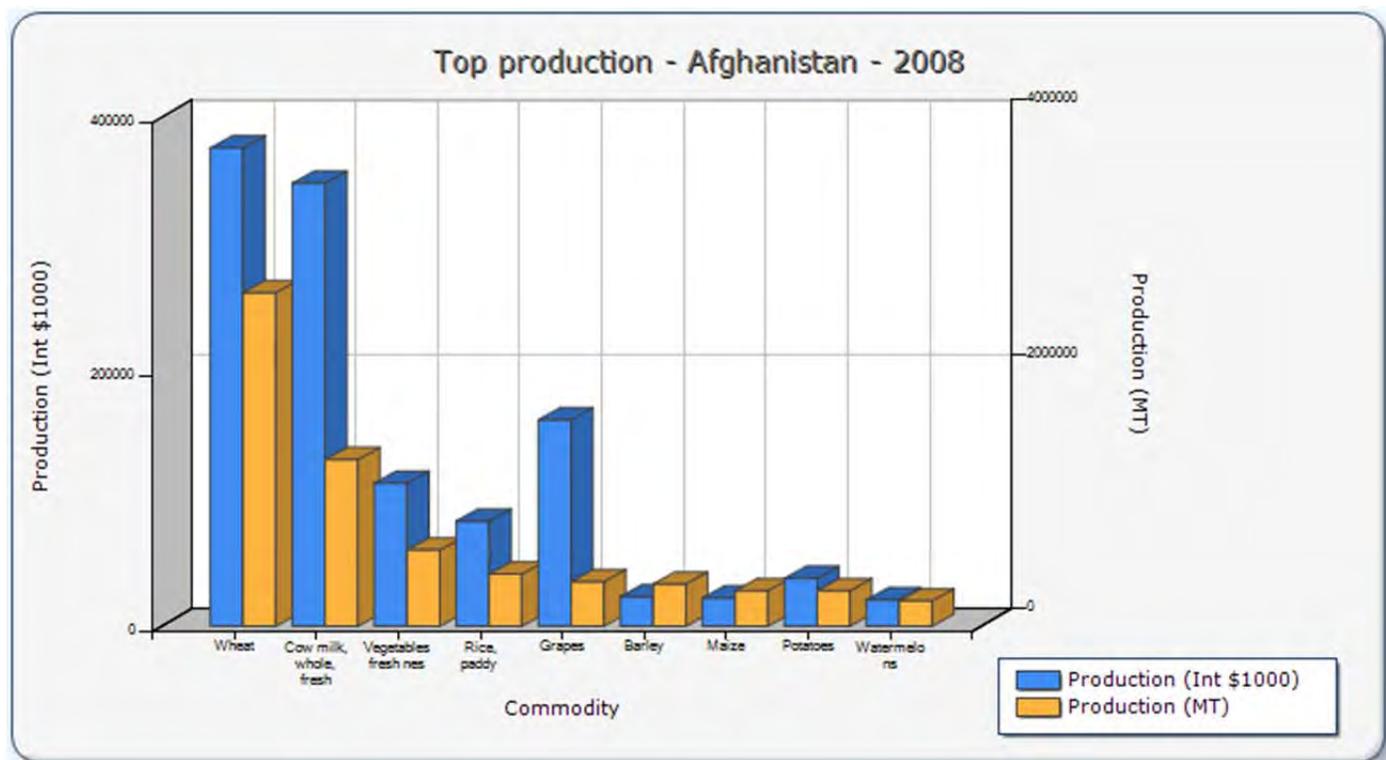
F: FAO estimate

Fc: Calculated data

Top 20 Commodity Productions in Afghanistan—Sorted by Quantity¹⁵

¹⁵ FAO STAT <http://faostat.fao.org/site/339/default.aspx>

Note: The FAO does not have any CountrySTAT information on Afghanistan and available statistics do not include figures for pesticides trade or consumption.



Rank	Commodity	Production (Int \$1000)	Flag	Production (MT)	Flag
1	Wheat	375989	*	2623000	
2	Cow milk, whole, fresh	348328	*	1309800	
3	Vegetables fresh nes	112590	*	600000	F
4	Rice, paddy	82860	*	410000	
5	Grapes	162365	*	350000	F
6	Barley	23338	*	333000	
7	Maize	22216	*	280000	
8	Potatoes	37713	*	280000	
9	Watermelons	20854	*	200000	
10	Sheep milk, whole, fresh	54976	*	162000	Fc
11	Indigenous Cattle Meat	274966	*	132944	Fc
12	Goat milk, whole, fresh	34002	*	112800	
13	Fruit Fresh Nes	15951	*	100000	F
14	Indigenous Sheep Meat	171872	*	86880	Fc
15	Sugar cane	186	*	62960	
16	Berries Nes	39153	*	57000	F
17	Pulses, nes	10070	*	42500	F
18	Almonds, with shell	43872	*	42000	
19	Indigenous Goat Meat	63338	*	41600	Fc
20	Cottonseed	5912	*	37000	*

* : Unofficial figure

[]: Official data

F : FAO estimate

Fc: Calculated data

Afghanistan, Country Rank by Commodity

2008, by value¹⁶

Rank	Commodity	Rank	Commodity
6	Berries Nes	33	Fruit Fresh Nes
7	Pistachios	33	Olives
9	Almonds, with shell	35	Watermelons
10	Silk-worm cocoons, reelable	36	Wool, greasy
10	Anise, badian, fennel, corian.	37	Cottonseed
10	Linseed	39	Peaches and nectarines
11	Figs	39	Millet
13	Sheep milk, whole, fresh	40	Cotton lint
15	Camel milk, whole, fresh	42	Sunflower seed
15	Pulses, nes	43	Rice, paddy
16	Sesame seed	44	Other melons (inc.cantaloupes)
17	Indigenous Camel Meat	47	Sugar beet
19	Indigenous Goat Meat	50	Nuts, nes
20	Goat milk, whole, fresh	51	Natural honey
21	Indigenous Sheep Meat	55	Cow milk, whole, fresh
24	Walnuts, with shell	58	Indigenous Cattle Meat
26	Apricots	62	Pears
26	Wheat	65	Maize
27	Grapes	73	Apples
28	Citrus fruit, nes	77	Oranges
29	Game meat	78	Potatoes
29	Vegetables fresh nes	89	Sugar cane
30	Barley	112	Hen eggs, in shell
31	Plums and sloes	113	Indigenous Chicken Meat

The following table is provided by the Afghanistan Statistical Yearbook. The table reflects the latest data.

Fruit Area and Production by Provinces and Regions - 2008-09¹⁷										
Area Hectare) Production (MT)										
Provinces	Peaches		Almond		Pomegranate		Apple		Grape	
	Prod	Area	Prod	Area	Prod	Area	Prod	Area	Prod	Area
Total	24960	1920	42000	12000	96000	8000	77000	7000	864000	57600
Region -NORTH	1560	120	15925	4550	24000	2000	1969	179	188745	12583
Samangan	260	20	14000	4000			770	70	3795	253
Balkh	1300	100	1750	500	24000	2000	990	90	13500	900
Sar-e-Pul	0	0	0	0	0	0	0	0	138150	9210
Juzjan	0	0	175	50	0	0	0	0	4800	320
Faryab	0	0	0	0	0	0	209	19	28500	1900

¹⁶FAO STAT <http://faostat.fao.org/DesktopDefault.aspx?PageID=339&lang=en&country=2>

¹⁷ Afghanistan Statistical Yearbook Data: <http://www.cso.gov.af/economics/agriculture.html>

Region -NORTH-EAST	3003	231	1323	378	144	12	3795	345	10725	715
Baghlan	1235	95	56	16	144	12	1320	120	3750	250
Badakhshan	663	51	350	100	0	0	880	80	0	0
Takhar	325	25	350	100	0	0	715	65	3300	220
Kunduz	780	60	567	162	0	0	880	80	3675	245
Region- WEST	1872	144	109	31	4560	380	1958	178	76500	5100
Badghis	130	10	0	0		0	330	30	0	0
Herat	1742	134	109	31	4560	380	1210	110	66000	4400
Farah	0	0	0	0	0	0	418	38	10500	700
Region- WEST-CENTRAL	598	46	214	61	0	0	1155	105	0	0
Bamyan	130	10	214	61	0	0	495	45	0	0
Ghor	468	36	0	0	0	0	660	60	0	0
Region- CENTRAL	11024	848	1855	530	9600	800	38632	3512	270180	18012
Kabul	7540	580	0	0	0	0	2200	200	108000	7200
Kapisa	195	15	630	180	9000	750	990	90	10500	700
Parwan	3250	250	875	250	600	50	2750	250	138750	9250
Wardak	0	0	350	100	0	0	27500	2500	0	0
Logar	0	0	0	0	0	0	4642	422	11235	749
Panjsher	39	3	0	0	0	0	550	50	16950	113
Region- SOUTH	442	34	3325	950	540	45	17270	1570	124500	8300
Ghazni			2100	600			13200	1200	121800	8120
Paktika	156	12	0	0			1870	170	0	0
Paktia	130	10	1225	350	300	25	2200	200	2700	180
Khost	156	12	0	0	240	20			0	0
Region-EAST	117	9	0	0	432	36	0	0	0	0
Nangarhar	0	0	0	0	360	30	0	0	0	0
Laghman	0	0	0	0			0	0	0	0
Kunarha	117	9	0	0	60	5	0	0	0	0
Nooristan	0	0	0	0	12	1	0	0	0	0
Region-SOUTH-WEST	6344	488	19250	5500	56724	4727	12221	1111	193350	12890
Daikundy	0	0	350	100	0	0	990	90	0	0
Urozgan	0	0	0	0	0	0	506	46	0	0
Zabul	0	0	18900	5400	720	60	1320	120	175500	11700
Kandahar	6084	468	0	0.0	56004	4667	9273	843	17850	1190

Helmand	260	20	0	0	0	0	0	0	0	0
Nemroz	0	0	0	0	0	0	132	12	0	0

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Afghanistan Statistical Yearbook data on agriculture.

<http://www.cso.gov.af/economics/agriculture.html>

Economic Profile of Afghanistan

Afghanistan Economic Indicators¹⁸

<i>Indicator</i>	<i>2008</i>	<i>2009</i>
Population	28,021,099	29,802,724
Population growth (annual %)	2.7	2.7
GDP Growth (annual %)	2.3	40.8
GNI Per Capita, atlas method (current US\$)	310	486 (2010)*
Inflation, GDP deflator (annual %)	20.9	15.5
Manufacturing, value added (%GDP)	17.4	13.3
Agriculture, value added (%GDP)	28.5	32.5
Trade (% of GDP)	63.2	.
Imports of goods and services (% of GDP)	47.7	.
Exports of goods and services (% of GDP)	15.6	.

* World Bank Databank

Afghanistan Principal Exports and Imports¹⁹

<i>Principal Exports 2006/2007</i>	<i>Principal Imports 2006/2007</i>
<ul style="list-style-type: none"> • Carpets • Dried Fruits • Fresh Fruits • Skins • Medicinal Plants 	<ul style="list-style-type: none"> • Machinery and Equipment • Household Items • Food • Metals • Petrol and Petroleum Products

The World Bank 2010 Afghanistan economic update indicates that “the composition of exports changed and dry fruits and seeds have become the largest official Afghan export. It accounts for half the total exports.”²⁰

Afghanistan Economic Overview

In October of 2010, the World Bank published an update on the economic state of Afghanistan²¹. According to this report, in 2009/10 the Afghanistan’s real GDP grew 22.5 percent. Private consumption is the driver behind the economic growth. This compares with real GDP growth of just 3.4% in 2008/09, when economic output was curtailed by

¹⁸ USAID Economic Analysis and Data Services (EADS) <http://esdb.eads.usaidallnet.gov/data/country/>

¹⁹ Afghanistan January 2011 Report, Economist Intelligence Unit

²⁰ The World Bank (2010). Afghanistan Economic Update, October. http://siteresources.worldbank.org/AFGHANISTANEXTN/Resources/305984-1264608805475/Afghanistan_Spring_Brief_April.pdf

²¹ The World Bank (2010). Afghanistan Economic Update, October. http://siteresources.worldbank.org/AFGHANISTANEXTN/Resources/305984-1264608805475/Afghanistan_Spring_Brief_April.pdf

drought, which depressed agricultural growth. The report states, “behind consumption growth, is the security economy that generates demand for goods and services, equipment, operations, maintenance of the national army, as well as higher spending by donors and their large off-the-budget contributions.”²² Contributing factors to the Afghani GDP include private consumption, government spending and investment. During the 2009/10 year, “private consumption contributed 22.1 percentage points of the 22.5 percent real growth (while net exports represented -5.7 percentage points).”²³ Government spending contributed a modest 3 percentage points to the GDP. Investment shows moderate growth over the years and contributed around 4 percentage points to GDP growth, mostly from the external budget capital spending and private investment in the security economy.²⁴

Significant sectors include services, “which contributed about half output (and over 10 percentage points of the 22.5 percent real growth). The most dynamic services subsectors have been communications (45 percent annual growth), finance and insurance (27 percent annual growth) and transport (22 percent annual growth), with wholesale and retail trade lagging at a marginal 4 percent growth.”²⁵ Agriculture contributed 7.3 percentage points; the contribution was fuelled by “a good cereal harvest and livestock. The sector’s output has been volatile because Afghanistan’s arable land and most irrigations systems depend on seasonal rain and snow.”²⁶ Industry did not fare as well during the 2009/2010 year, “industry contracted by 3 percent over the last year, due largely to weaker manufacturing, that contracted by 12 percent. In addition, construction contributed 1.86 percentage points, while mining added only a marginal 0.11 percent of last year’s GDP growth.”²⁷

According to IMF data, inflation peaked at 43 percent year on year in May 2008 due to surging global food and fuel prices. During 2009, strong domestic harvests caused prices to drop rapidly, however inflation is likely to average above 5 percent in the medium term, owing to rapid economic growth and supply constraints. After 14 consecutive months of year on year falls, price levels began to rise again in June 2010.²⁸ Also, wheat prices surged due weak harvests during the previous year.²⁹

Trade as a share of GDP significantly declined in 2009/10. During 2006/07-2009/10, imports as a percent of GDP declined from 87 percent to 64 percent and exports decline from 23 percent to 15 percent of GDP.³⁰

The banking sector in Afghanistan remains weak. The 2010 World Bank update provides the following summary:³¹

²² Ibid

²³ Ibid

²⁴ Ibid

²⁵ Ibid

²⁶ Ibid

²⁷ Ibid

²⁸ Ibid

²⁹ Ibid

³⁰ Ibid

³¹ Ibid

New macroeconomic risk has emerged in the domestic banking sector. The biggest private sector bank, Kabul Bank, which is used for payment of salaries to civil servants, had a run on its deposits and lost all its liquidity in a week in September 2010. This shows limited capacity of the central bank in ensuring regulatory oversight.

The opium economy gained some ground in 2009/10. Although declining since 2007, “illegal opium revenues surged because of reduction in production due to plant disease, which has halved the crop but more than doubled the price. Though farmers with damaged crops might be expected to experience a sharp drop in income, the overall opium revenues at farms would jump by 38 percent, in nominal terms, or 5 percent of GDP.”³² Although illegal, cultivation of poppies for heroin and opium production remains the largest industry in Afghanistan.

Afghanistan’s natural resources may provide the economy with the boost it needs. In July 2010, “the World Bank asserted that Afghanistan’s natural resources, and its mineral resources in particular, offer the best opportunity for the country to achieve sustainable economic growth. The Bank noted that there had been progress in the exploration of the Hajigak and Aynak mines and the Shiberghan gasfield. But it warned that the timeframe for moving from exploration to tendering and finally to operation of projects would be at least eight years.”³³

Economic Forecast

During 2010/11, Afghanistan’s economy is predicted to grow by 8.5-9 percent, with inflation around the government’s target of 5 percent, assuming banking sector losses are contained.³⁴

Economic expansion will be buttressed by “strong construction investment (much of which will be linked to donor-led development projects) and by private consumption.”³⁵

Industrial growth may also be boosted by improved electricity supplies during the forecast period. A transmission link to Uzbekistan has boosted power supplies in the Afghan capital, Kabul, and the rehabilitation of hydroelectric projects at Mahipar and Kajaki will provide further support to generating capacity, provided that rainfall is adequate.³⁶

Harvests are expected to be good for 2010/11; however official agricultural production may be affected by the conversion of land from cereals to illicit crops. Prices for cereal crops have fallen, making opium production more attractive, but a fungus affecting opium poppies may yet deter farmers from switching.³⁷

³² Ibid

³³ Ibid

³⁴ Ibid

³⁵ Ibid

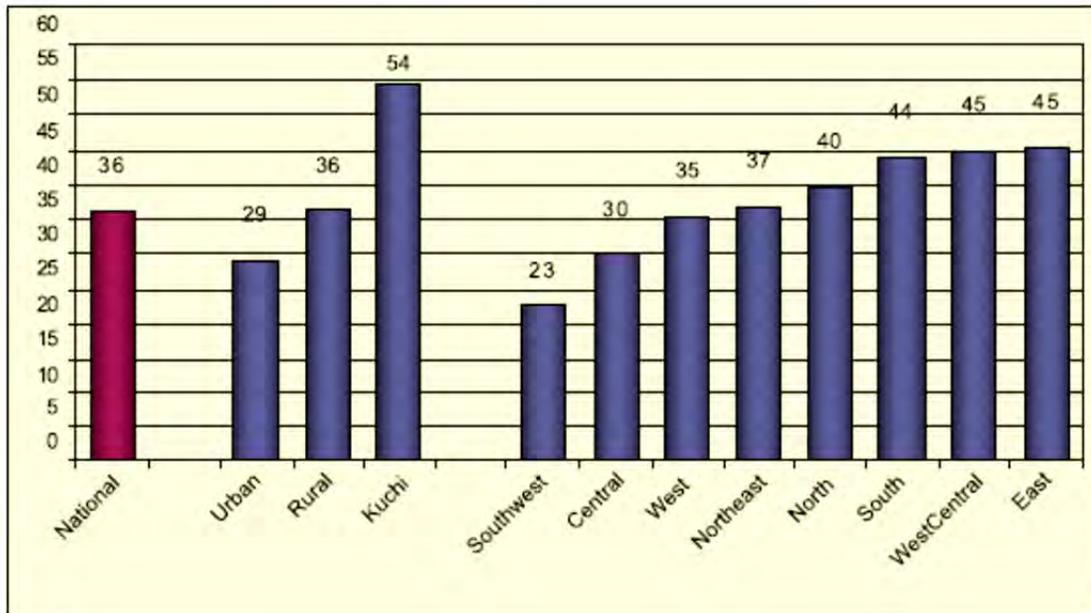
³⁶ Ibid

³⁷ Ibid

Poverty Profile

The poverty profile is provided by the 2007/2008 National Risk and Vulnerability Assessment (NRVA) report.³⁸

Poverty Headcount Rate, by Residence and Major Region³⁹



According to the NRVA 2007/08, the overall poverty headcount rate for Afghanistan is around 36 percent of the total population and indicates that about 9 million Afghans cannot meet their basic needs. The average per-capita monthly consumption expenditure of poor Afghans is only 950 Afghanis or about \$22 USD and the corresponding figure for the non-poor is less than 2,100 Afs, or about \$49 USD.⁴⁰

Poverty incidence is high in any part of the country. Poverty in the rural population is close to the national average, the incidence in the urban population is relatively low (29 percent) and in Kuchi population very high (54 percent). The corresponding figures for major regions range from 23 percent in Southwest to 45 percent in East and West-Central.⁴¹

A large share of the population has a consumption levels that is only little above the poverty threshold, implying that they are vulnerable to falling into poverty with small adverse shifts in their livelihoods. Also, there is a correlation between household size and poverty, the larger the family the greater likelihood of poverty. The face of poverty is

³⁸ The National Risk and Vulnerability Assessment (Full Report) 2007/2008, A Profile of Afghanistan, p.56
<http://nrva.cso.gov.af/NRVA%202007-08%20Report.pdf>

³⁹ Ibid

⁴⁰ Ibid

⁴¹ Ibid

furthermore revealed in poor access to basic services like safe drinking water, improved sanitation and electricity.⁴²

On average, poverty is more widespread in the rare cases that households are female-headed than in male-headed households (38 versus 33 percent). Underlying factors could be that women have less access to the labor market for employment or that widows lack the support of a partner for income generating.⁴³

Literature: Afghanistan Economy

List of all World Bank literature on Afghanistan.

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<http://www.alticonsulting.com/sme-reports.html>

For USAID: study of 9 sectors: Cakes and Candles, Cashmere, Edible Vegetable Oil, Flour, Gemstones, Metal Working, Milk and Yogurt, Renewable Energy and Energy Efficiency and Retail.

For UNDP: study of 7 sectors: Poultry, Cumin and Saffron, Wheat Based Products, Cashmere, Construction, Detergents and Gemstones.

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USAID

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Duration: October 2006- October 2011

Implementing Partner: DAI

http://afghanistan.usaid.gov/en/USAID/Activity/32/Afghanistan_Small_and_Medium_Enterprise_Development_ASMED

Agriculture, Rural Investment and Enterprise Strengthening (ARIES).

Duration: September 2006- December 2009

Implementing Partner: AED

<http://www.acdivoca.org/site/ID/afghanistanARIES>

Mentions involvement in Herat:

http://www.microlinks.org/ev_en.php?ID=42642_201&ID2=DO_TOPIC

ARIES: MISFA-SME Program Brief No. 2.

http://pdf.usaid.gov/pdf_docs/PNADT985.pdf

UNDP

Trade and Private Sector Development Programme (TPSDP).

Duration: July 2008-April 2010

Implementing Partners: Afghanistan Investment Support Agency (AISA) and Ministry of Commerce and Industries

http://www.undp.org.af/WhoWeAre/UNDPinAfghanistan/Projects/psl/prj_psdp.htm

MRRD (MRRD is the implementing partners, there are many donors)

Afghanistan Rural Enterprise Development Program (AREDP).

Duration: 2007- On-going

Implementing Partner: Ministry of Rural Rehabilitation and Development (MRRD)

<http://www.mrrd.gov.af/aredp/>

Afghanistan Ministry of Commerce and Industry

The Provincial Economic Development Project (PEDP).

Duration: 2007- Ongoing

<http://www.commerce.gov.af/psdd%20website/improvingthebusinessclimate2.aspx>

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