

PN ABY975

91305

Opportunities for Additional Airline Exports of Fresh Produce for Jordan

Prepared for
Agricultural Marketing Organization
and the
Jordan Exporters Association
for Fresh Fruit and Vegetables
Amman - Jordan

At the request of
Agricultural Marketing Development Project
Amman - Jordan

Under contract to the
US Agency for International Development

■
November, 1994
Prepared by



الجمهورية الاستشارية للتنمية والاعمار

COMMUNITY DEVELOPMENT GROUP /CDG/ ENGINEERING + MANAGEMENT ASSOCIATES
P.O. BOX 850994 AMMAN JORDAN, TEL 962-6-863861/ FAX 962-6-863861/ TLX 21227 DRILCO JO

PREFACE

This report was prepared in close cooperation between Mr. Raed Hattar of the Agricultural Marketing Organization, Mrs. Maha Shawareb Nimri of the Jordan Exporters Association for Fresh Fruit and Vegetables, and Mr. Richard Peters of the Agricultural Marketing Development Project and the Study Team of the Community Development Group which was comprised of Ms. Seham Cyrani, Ms. Sereen Juma as the Principal Researchers, and Mr. Ramzi N Kawar as the Project Manager.

ACKNOWLEDGEMENTS

CDG would like to express its gratitude and appreciation to the following individuals who have graciously contributed their time, insight and expertise, and without whom this study would have been incomplete:

Haddadin, Karim	Jordan Exporters Association
Haddadin, Wael	Jordan Exporters Association
Maayah, Ramy	JEDCO
Masri, Said	JORICO
Momani, Awni	International Relations, Civil Aviation
Murtada, Mohammad Hashem	Air Cargo Division, Royal Jordanian
Ospital, Phillippe	French Cultural Attache
Pierard, Jean Pierre	European Commission in Amman
Ragabi, Nabil	Samih Ragabi & Sons
Samandar, Augustine	Eastern

Special thanks go to Mr. Raed Hattar of Agricultural Marketing Organization, the library staff at AMO for their guidance and extra time spent in assisting us with this study.

CDG acknowledges the contribution of Mr. Riad Al Khouri of MEBA, Ltd. especially in the construction of the rating system used in the methodology.

ABBREVIATIONS

Abbreviation	Full Name
AMO	Agricultural Marketing Organization
APEC	Asia-Pacific Economic Co-operation
ASEAN	Association of South East Asian Nations
ATPA	Andean Trade Preference Act
CEFTA	Central European Free Trade Area
ECO	Economic Cooperation Organization
EEA	European Economic Area
EFTA	European Free Trade Association
EU (EC, EEC)	European Union (European Community, European Economic Community)
FAO	Food & Agricultural Organization
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
GNP	Gross National Product
IATA	International Air Traffic Association
JEAFFV	Jordan Exporters Association for Fresh Fruit and Vegetables
MCC	Maximum Cargo Capacity per Week
MT	Metric Tons
NAFTA	North African Free Trade Agreement
OECD	Organization of Economic Co-operation & Development
RJ	Royal Jordanian Airline
SAARC	South Asian Association for Regional Co-operation

TABLE OF CONTENTS

	Page Number
Chapter 1 General Outlook	1
Chapter 2 Methodology	6
Chapter 3 Market Profiles	12
Chapter 4 Airlines and Cargoes	40
Chapter 5 Strategy and Recommendation	45
Appendix 1 Selected Regional Trade Arrangements	48
Appendix 2 EU Customs Tariff	49
Appendix 3 Airlines Winter Schedule	50
Appendix 4 Airlines Summer Schedule	58
Appendix 5 Annual Jordanian Exports of Fruit and Vegetables	66
Selected Bibliography	70

CHAPTER 1

GENERAL OUTLOOK

1.1 Introduction

CDG engineering + management associates was commissioned by the Agricultural Marketing Organization (AMO) and Jordan Exporters Association (JEA) to conduct a comprehensive study on the potential of exports of Jordanian fresh fruit and vegetables to new markets via national and international passenger and cargo carriers, and to assess the possibility of further expansion in existing markets. The study takes a look at airline export markets of Jordan, focusing on current cargo capacities for fresh fruit and vegetables, and on international market potentials for three classifications of fruit and vegetables based on the following information:

1. Comprehensive and detailed schedules of Royal Jordanian Airlines and international airlines whose flights depart from Amman.
2. Available cargo space on all passenger and scheduled cargo flights originating in Amman.

1.2 Jordan and Agriculture

As a developing country, Jordan's policy has been to promote export-oriented industries to stimulate economic growth. In this context, the agricultural sector is considered an important element of this policy. In 1992, agriculture constituted 7% of the total share of GDP.

Apart from scarcity of water supply and cultivable land, a major problem in Jordan's agriculture lies in the absence of a proper marketing strategy, and consequently an inconsistent supply of fresh fruit and vegetables, both within the country and for export.

Until recently, agricultural marketing efforts were directed mostly towards Europe, especially during the winter seasons, and the Gulf countries. With the depreciation of its currency in 1988 and 1989, Jordan's products became more competitive in international markets, and exports of fresh fruit and vegetables increased during this period. The Gulf Crisis in 1990 and 1991, however, affected trade, and fresh produce exports to the Gulf region was reduced drastically.

Today, there is a renewed effort to revive this sector through capital investment, government policies, and international assistance. Areas of focus include improving marketing strategy, identifying alternative markets, and targeting seasonal demand for various vegetable and fruit items.

1.3 Jordanian Agricultural Exports

Traditionally, Western Europe and Arab countries have been Jordan's main customers for fresh fruit and vegetables. However, tightening EU regulations and increased competition in the European market, and political instability and saturated markets in the Gulf region, has led Jordan to seek new export destinations. Recent statistics show that Jordan has begun to penetrate markets in Eastern Europe and the Former Soviet Union as well as Southeast Asia.

Jordan's exports of fruit to foreign countries between 1990 and 1993 increased fivefold, reaching 1,662.1 mt. in 1993. Fruit exports to Arab countries, on the other hand, fluctuated, registering a 29% drop in 1991 from the previous year, and affecting the overall fruit export. Fruit exports to Arab countries account for over 98% of Jordan's total fruit exports. This included exports by land.

Jordanian Export of Fresh Fruit (in metric tons)

	1990	1991	1992	1993
Foreign Countries	257.8	715.3	976.8	1,662.1
Arab Countries	103,431.0	72,846.0	76,464.0	93,589.7
Total	103,688.8	73,561.3	77,440.8	95,215.8

Jordan's export of vegetables to foreign countries dropped from 1990 to 1992 by 75%, and then rose again in 1993, exceeding 1990's level. Exports to Arab countries alternated between decreases and increases. Export level in 1993 dropped to nearly half of what it was in 1990. In spite of a downturn, Jordan's total exports of vegetables are about two to four times greater than its fruit exports.

Jordanian Export of Fresh Vegetables (in metric tons)

	1990	1991	1992	1993
Foreign Countries	5,915.8	4,229.3	1,454.6	6,332.3
Arab Countries	457,505.6	256,899.4	308,366.5	242,449.0
Total	463,421.4	261,128.7	309,821.1	248,781.3

1.4 Jordan's Advantages

Jordan enjoys several advantages in terms of agricultural production and export in comparison to other countries:

1. low labor costs.
2. moderate temperatures in the Jordan Valley during winter months enabling it to grow certain produce during the off-season.
3. strategic location in terms of proximity to the European continent, Former Soviet Union, and the Near East.

1.5 Jordan's Restricting Factors

There are two types of restricting factors, on the other hand, which Jordan's agricultural production and exports is facing. First, those factors which could not be controlled by Jordan including tariffs and quotas imposed by the importing country. Second, those which could be controlled such as improving labor efficiency, quality standards, production capacities, and post-harvesting techniques.

One aspect that would increase Jordan's chances of improving its exports to existing foreign (especially the EU) is a greater adherence to quality standards as set out in the Protocol of 1976 and as required by GATT. It is not yet clear whether Jordan's joining of the GATT will represent a clear cut advantage for its fruit and vegetable export. This requires further research.

1.6 International Market Situation

When the world economy fell into a recession in 1990, induced in part by major political changes occurring in Eastern Europe and the Former Soviet Union, it left a severe

impact on international trade. Economic growth in industrialized countries slowed down, which in turn affected developing countries that rely on their markets for exports of goods. Agricultural goods in particular, comprise as much as 13% of total exports from developing countries. This illustrates the importance of economic stability in international markets for the promotion of Jordanian agricultural exports, and the necessity of taking into account economic factors when selecting markets for exports.

1.7 Former Communist Countries and the EU

Trade with the countries of central and Eastern Europe before the collapse of communist rule in 1988-90 was hampered by the lack of normal trading relations and by the inherited inefficiencies of command economies. A mutual recognition agreement was reached in June 1988 with Comecon, the Soviet-dominated organization for economic cooperation, which was wound up in 1991. This opened the way to the establishment of diplomatic relations between the EU (then EC) and individual East European countries as well as Cuba. Trade and cooperation agreements were subsequently signed with Poland, Hungary, Czechoslovakia, Bulgaria, Romania and the Soviet Union. At the same time, considerable economic and technical aid was made available to the first three countries, and humanitarian aid was given to Bulgaria, Romania and the Soviet Union.

1.8 Association Agreements

Negotiations began in 1990-91 with a view to concluding far-reaching association agreements (known as Europe Agreements) with the new democracies of central and Eastern Europe, which would provide tariff-free access for most of their manufacturing goods while maintaining restrictions on their free export of textiles and agricultural products. EU association agreements exist for the following countries: Albania, Bulgaria, the Czech Republic, Hungary, Poland, Romania, the Slovak Republic, Slovenia and the Baltic states - the remaining former Yugoslav republics may qualify for comparable treatment in the future.

Bulgaria has recently concluded agreements with the EU and EFTA reducing trade barriers for some Bulgarian exports. This reveals a building of close ties with the EU that will lead to a familiarization of the EU standards and regulations.

1.9 EU Enlargement - Central and East European Countries

At the Copenhagen summit in June 1993, it was specifically affirmed that any central or East European country that so wished could become a member of the EU "once it was able to fulfill the obligations associated with membership and meet the economic and political requirements." However, applications are not expected to be given serious attention until after 1996.

1.10 Reform Programs of Central and Eastern European Countries

The start of the 1990s heralded a new economic era for central European and Eastern European countries (former USSR) who broke off from the Soviet bloc and declared themselves independent states; most developed ambitious reform programs (some supported by the World Bank and the IMF) to transfer their command economies to market economies. The aim was to adopt restrictive monetary and fiscal policies that included sharply higher interest rates. The reforms included price liberalization, realigning the exchange rate and measures to increase competition.

However, the characteristic economic consequences of the collapse of the Soviet trading and payments bloc were a decline in output due to a sharp drop in input

materials which, up until then, had come from the Soviet Union bloc, and a parallel decline in incomes. Other causes of such reductions were the impact of the embargo on Iraq and Yugoslavia (now Slovenia, Croatia, Bosnia, Serbia) and the failure, often, of the stabilization policies of new governments.

The medium-term prospects for these new states are encouraging. Generally, they are advantaged by the absence of debts that can allow them to use foreign borrowing to transform productive capacity and by the existence of a literate and skilled workforce earning wages that are relatively low by international standards.

1.11 Drought in Central Europe

Drought in 1990 to 1991 affected all of central Europe and led to serious crop losses of as high as 25%. This is an important fact to take into account when approaching central European states who rely substantially on agriculture to contribute to their annual GDP. Their overall economic growth will have been seriously decreased by reductions in crop output and will reflect in the GNP per capita. Therefore, some countries' financial capabilities to import may be significantly diminished. On the other hand, there will be a higher than usual demand for imported goods, particularly agricultural produce.

1.12 Competition

In Europe, particularly EU members, Jordan's competitors are many and strong. However, it is not within the scope of this study to analyze the present competition. It suffices to give them mention as traditional suppliers to Western Europe: Brazil, Chile, Israel, Jamaica, Mexico, Morocco, Venezuela and EU members themselves.

In the case of central and Eastern European countries, competition is generally more moderate but, with association agreements and prospects of joining the EU, competition in some of these countries will develop rapidly along with standards and regulations.

1.13 Asia and Oceania

The increased tendency towards regional cooperation and protectionism (similar to EU), have led to East Asia and Southeast Asia, one of the fastest growing regions in the world, to follow suit. In the Pacific region, APEC was formed in 1989 with the aim of creating a free trade zone, which includes the United States, Mexico, Canada, Australia and New Zealand in addition to Asian countries. Similarly, ASEAN was created for countries in Southeast Asia to ensure free flow of goods among member countries and to eventually change the region to a free trade zone.

Countries to watch for in this region include China, which is making a transition towards a market-based economy, Indonesia, which is successfully implementing an economic reform program, and Thailand and Korea which have achieved impressive economic growth.

1.14 Impact of Peace Treaty with Israel

According to exporters and economic observers, following the Peace Treaty signed between Jordan and Israel, Israel holds great potential as a new market for Jordan's fresh produce. However, the likelihood of fresh produce being shipped over to Israel by refrigerated trucking facilities, puts this market out of the scope of this study. Conversations with diplomatic sources indicate that business prospects and ventures are likely to develop swiftly, especially once trading channels are established.

In the medium term, the Peace Treaty is expected to encourage passenger flights from other countries to accommodate the influx of tourists as Jordan's tourism industry is promoted. This inevitably places before Jordan the potential use of more cargo space as well as causing an increase in Jordan's consumption of imports to meet the needs of tourists and that of the Jordanian people's acquired tastes and needs.

However, there will be little opportunity for competition between RJ and other carriers because foreign passenger carriers must abide by the regulations set by the Jordanian Authorities including the price rates. Ultimately, RJ takes priority, i.e. their spaces must be filled up first; the excess may be allowed to be transported on other carriers upon obtaining permission.

CHAPTER 2

METHODOLOGY

2.1 Fruit/Vegetable Selection Criteria

Fruit and vegetable items were selected from statistics indicating that Jordan has grown and exported these items in the past. However, the scope of this study is by no means limited to items grown in Jordan only. Rather, it is based on the assumption that given the appropriate climate and agricultural technology, Jordan is capable of growing a wide range of fruit and vegetable. This study looks at three categories of fruit and vegetables, classified according to the following definitions:

Priority fruit and vegetables: items that Jordan produces and exports most of or items that are imported most in international markets.

Specialty fruit and vegetables: items that are produced and exported in small quantities by Jordan and not imported extensively in international markets because they are not considered part of the daily food diet.

Ethnic fruit and vegetables: items that are native to Jordan and the Middle East and which are consumed by Middle Eastern ethnic communities abroad.

Vegetables

PRIORITY	SPECIALTY	ETHNIC
cabbage capsicum cauliflower cucumber eggplant green bean lettuce onion potato tomato squash	asparagus broccoli mushroom pumpkin	coriander garlic hot Turkish pepper Jew's mallow mint okra olive parsley thyme vine leaf

Fruit

PRIORITY	SPECIALTY	ETHNIC
apple grape grapefruit lemon, lime orange, mandarin, clem peach pear plum pomelo watermelon	avocado banana cherry guava melon mango papaya strawberry	almond apricot date fig pomegranate

2.2 Market Selection

Based on the scores each country received (see Rating System), export markets were divided into two categories: those with marginal potential and those with strong potential. In Chapter Three, the expansion potential of Jordanian fresh produce exports in these markets is discussed in detail.

2.3 Analyses

Various authorities were unable to provide information about how much demand there is for specific fruit and vegetable items in any one given country. Therefore, it was necessary to resort to other market indicators such as very recent studies, articles in specialist periodicals, and knowledge-through-experience of exporters and agricultural economists.

Jordanian specialty items constitute a new addition to Jordanian horticultural exports, and as such, information regarding the demand of them in international markets was almost non-existent. Where possible, information was drawn from statistics of international country imports, from reports and articles about particular specialty items, and from oral sources such as fruit and vegetable exporters.

Statistics quoted are from two main sources, unless otherwise stated. Information about how much Jordan exported from 1990 to 1993 was drawn from Yearly Statistical Reports of the Jordanian Agricultural Marketing Organization. Information about how much countries (other than Jordan) imported of various vegetables and fruit items from 1990 to 1992 was drawn from the United Nations Food and Agriculture Organization Trade Yearbooks.

It is important to note here that country statistics from FAO Yearbooks is limited to data on the following fruit:

PRIORITY	SPECIALTY	ETHNIC
apple grape lemon, lime orange, mandarin, clem peach pear	banana	date

and the following vegetables:

PRIORITY	SPECIALTY	ETHNIC
potato tomato onion		

Because of the unavailability of statistics on additional fruit and vegetables, this study will only make observations for the above-mentioned items. Statistics for these fresh produce items have been incorporated into matrices and, where possible, show how much Jordanian fruit/vegetable item accounts for that country's overall import of that particular item.

Where figures are available, analyses of each market includes:

1. Economic background information
2. Total country population
3. Ethnic population
4. Maximum cargo capacity per week on passenger and cargo flights from Jordan during winter and summer seasons
5. Memberships in regional trade arrangements.

2.4 Weekly Cargo Capacity

Based on a government policy that promotes agricultural exports, Royal Jordan Airlines may allocate as much as 2/3 of the aircraft's total cargo capacity for agricultural products, should the need arise. Maximum cargo capacity per week (MCC) is therefore calculated by taking 2/3 of total cargo capacity of all RJ passenger and cargo flights per week to a given destination.

2.5 Rating System

2.5.1 Initial Criteria: Medium-term supply

Fruit and vegetables were selected from statistics indicating that Jordan grows these items. The scope of this study is to cover the medium-term; this means, in the case of most fruit and vegetables, items currently grown in Jordan. In the long-term, given the appropriate agricultural technology and other factors, Jordan is capable of growing a wider range of fruit and vegetables.

2.5.2 Initial Criteria: Medium-term demand

Consumers in potential and actual markets are assumed to have fixed tastes over the medium-term. In the longer term, this could easily change, but in a smaller time period, tastes do not change drastically.

2.5.2 Demand Rating

Three factors were considered in rating demand, as follows:

2.5.2.1 Demand Rating: GNP per capita

This criteria is based on the reasoning that a high annual income would enable consumers to be more selective with their purchases and spend more on high quality goods. The GNP per capita of each country for 1992 is taken into account and given a numerical score according the World Bank scale below. In Chapter Three, the sections "Economic Indicators", a rough guide to quality demand, is given in details where available for each country, on health and education levels.

<u>GNP per capita (US \$)</u>	<u>Rating</u>	<u>Score</u>
\$8,356 and above	high	3
\$2,696 - 8,355	upper middle	2
\$676 - 2,695	lower middle	1
\$675 and below	low	0

2.5.2.2 Demand Rating: Population

This determines the total number of consumers in the market, an important factor in measuring overall demand. The population of each country for 1992 is taken into account and given a numerical score according to the scale below:

<u>Population</u>	<u>Rating</u>	<u>Score</u>
Above 100 million	high	3
35 - 100 million	upper middle	2
10 - 35 million	lower middle	1
Below 10 million	small	0

2.5.2.3 Demand Rating: Market Openness

Memberships in regional trade arrangements, strictness in imposing import regulations and other special factors limiting imports of fruit and vegetables are taken into account according to the following scale:

<u>Rating</u>	<u>Score</u>
Open market	3
Some restrictions	2
Many restrictions	1
Closed market	0

Adding up factors 1, 2 and 3 of demand yields a score for each market from zero to nine.

2.5.3 Supply Rating

Air freight costs from Jordan are a major supply criterion to be taken into account. Competition or other circumstances may impose a low air freight rate. Destinations for which RJ offers subsidized freight rates such as Western Europe and to which RJ and foreign carriers each operate two flights per week are given a score of three. Destinations which only RJ or only a foreign carrier flies to, or which both RJ and foreign carriers fly to but operate less than two flights per week are given a score of two. Destinations which have no flights operating from Jordan but are relatively close so that alternative air freight can be arranged at reasonable costs, are given a score of one. This would include Europe and continental Asia. Finally, destinations which have no flights operating from Jordan and are relatively far, are given a score of zero. This would include countries in the Pacific, North, South and Central America and Africa.

These points are added on to the demand tally.

2.5.4 Overall Rating

Combining all the factors in this rating system gives a score from zero to twelve. Markets ranking zero to four are dismissed as too weak and have not been discussed in the study. Those markets ranking from eight to twelve are potential export markets for Jordan. Markets ranking from five to seven will then have to be examined for special factors which might make them attractive or otherwise. For example, the presence of severe political instability or the absence of any ethnic demand for products from the Middle East could be grounds for dismissing an "intermediate" market ranking from five to seven and is not considered in the medium term as a potential export market for Jordan.

2.6 Market Potential Rating

2.6.1 Markets with Marginal Potential (scores 5-7)

Country	GNP per capita	Population	Market openness	Air freight	Rating
Australia	3	1	2	0	6
Austria*	3	0	1	3	7
Belgium*	3	0	1	2	6
Czech Republic	1	1	2	1	5
Denmark	3	0	1	1	5
Finland	3	0	1	1	5
Hong Kong	3	0	2	1	6
Hungary	2	1	2	1	6
Indonesia*	0	3	2	2	7
Iran	1	2	2	1	6
Ireland	3	0	1	1	5
Korea	1	2	2	0	5
Malaysia*	2	1	2	2	7
Norway	3	0	1	1	5
Pakistan*	0	3	2	2	7
Poland	1	2	2	1	6
Romania*	1	1	2	2	6
Singapore*	3	0	2	2	7
Sweden	3	0	1	1	5
Switzerland*	3	0	2	2	7
Thailand*	1	2	2	2	7

Arab Countries

Lebanon*	1	0	3	3	7
----------	---	---	---	---	---

2.6.2 Markets with Strong Potential (scores 8 and over)

Country	GNP per capita	Population	Market openness	Air freight	Rating
Canada*	3	1	2	2	8
France*	3	2	1	3	9
Germany*	3	2	1	3	9
Italy*	3	2	1	3	9
Japan	3	3	2	0	8
Netherlands, The*	3	1	1	3	8
Russia*	1	3	2	2	8
Spain*	3	2	1	2	8
Turkey*	1	2	2	3	8
United Kingdom*	3	2	1	3	9
United States*	3	3	1	2	9

Markets with Strong Potential (cont'd)

Country	GNP per capita	Population	Market openness	Air freight	Rating
Arab Countries					
Bahrain*	2	0	3	3	8
Oman*	2	0	3	3	8
Qatar*	3	0	3	3	9
Saudi Arabia*	2	1	2	3	8
U.A.E.*	3	0	3	3	9

* - Flights to this destination currently operating from Jordan

CHAPTER 3

MARKET PROFILES

This chapter takes a look at the markets identified as having strong potentials and marginal potentials, inclusive of already existing markets for Jordan's fresh fruit and vegetables. Following a short discussion of the overall produce situation, there is a list of market profiles of the identified countries, each including a section on "economic indicators".

Economic indicators are followed by data on Arab populations and total country population figures, plus maximum cargo capacity figures per week for the winter season and the summer season. There also follows information regarding a country's membership in any trade arrangements. Then there follows an analysis of past market performances and a look at the potential items for marketing for fruit and for vegetables individually since the markets tend to differ for each. This analysis has depended on the limited availability of information. Where a country is an existing market for Jordanian fruit and/or vegetables, this is indicated in parentheses in appropriate sections.

When discussing agricultural produce, the economic indicators may give a breakdown which could include meat and dairy produce - produce that has no relevance with this study. Therefore these figures must be treated carefully and are no more than a rough guide to that country's dependence on agriculture as a whole. Information regarding health and education standards are provided where possible to give an intuitive indication of the demands of produce quality.

3.1 Foreign Markets with Marginal Potential

AUSTRALIA

Rating: 6

Economic Indicators

Australia has experienced an average real growth rate of 0.7% from 1985 to 1992. The GNP per capita in 1991 was \$17,120 falling slightly to \$17,070 in 1992. The share of agriculture in GDP 1992 was about 3%.

1989 Arab population: 210,100
1992 total population: 17,529,000
MCC Winter: 0
MCC Summer: 0
Flights are planned for 1995
Membership: APEC

Fruit

This market's import of priority fruit items is moderate (under 10,000 mt per fruit). Imports between 1990 and 1992 are characterized by alternating drops and rises. Top three priority fruit imports in 1993 were oranges (5,615 mt), lemons (1,850 mt) and peaches (1,750 mt). Insignificant amounts of apples and grapes entered the market in 1993 as well. Imports of dates (ethnic item) however, increased steadily from 1990 to 1992, reaching 3,831 mt in 1992. Jordan should enter this market by targeting market window for priority items and ethnic community.

Vegetables

FAO statistics indicate Australia is small importer of priority vegetables (0.1 - 1,031 mt), with imports of onions and potatoes decreasing. RJ's plans to fly to Australia, mean that exports of fresh produce will be facilitated, and Jordan could look into supplying this market with ethnic vegetables for its small Arab Community.

AUSTRIA

Rating: 7

Economic Indicators

Austria has experienced an average real growth rate of 2.4% from 1985 to 1992. The GNP per capita in 1991 was \$20,200 rising to \$22,110 in 1992. The share of agriculture in GDP 1992 was about 3%.

1989 Arab population: very little presence

1992 total population: 7,884,000

MCC Winter: 3 RJ passenger flights to Vienna, MCC 5000 mt
2 OS passenger flights to Vienna, MCC 5,333.3 mt

MCC Summer: 3 RJ passenger flights to Vienna, MCC 7666.6 mt
2 OS passenger flights to Vienna, MCC 5,333.3 mt

Membership: EFTA; EU and EEA in 1995

Fruit

Austria has been considered as a new market with regard to fruit because Jordan has not exported any fruit to Austria since 1990. Jordan should perhaps begin exporting priority fruit item such as apples, oranges and grapes that sell very well in the EU market. Although Austria's ethnic population appears to be small in comparison to other European countries, there is potential for certain ethnic fruit item such as dates which it imported an average of 572 tons between 1990 and 1992.

Vegetables (existing market)

This market appears to be a priority vegetable market. However, exploration should be made of certain specialty items also such as asparagus, broccoli and mushrooms since they are items that appeal to Austrian cuisine. At this stage, the fact that there is very little Arab presence is a rough indication that a market for ethnic vegetable items barely exists. Austria's import standards in terms of quality of produce is already high and will be further streamlined upon joining the EU in January 1995.

BELGIUM

Rating: 6

Economic Indicators

Belgium, a founder member of the EU, had GDP of \$192 billion in 1989 with an increase in its revenue due to the presence of many international organizations. In 1990, after one and a half decades of strong and sustained average growth, the GDP is estimated at 3.7% with per capita GDP of \$21,275. Agriculture, forestry and fishing accounted for only 1.9% of GDP (1990) compared to the EU average share of 13.5% (1988-1990).

1989 Arab population: 150,000

1992 total population: 9,998,000

MCC Winter: 2 RJ passenger flights to Brussels, MCC 2,666.6 mt

MCC Summer: 2 RJ passenger flights to Brussels, MCC 9,333.3 mt

Membership: EU, EEA

Fruit (existing market)

Since 1990, Jordan's export of grapes peaked at 53.3 mt in 1992, and then dropped to 1.5 mt the following year. No other fruit item was exported. However, Belgium has steadily increased its imports of grapes, oranges, and lemons between 1990 and 1992. This indicates increased opportunities for Jordan to expand into this market by targeting the market window for these priority fruit products and export quality items only.

Vegetables (existing market)

Jordan's main priority item exports have diminished in quantity over the past four years (1990-93) due to increased competition that supplies high quality produce. The large exports of cucumber (97 mt), eggplant (265 mt), green bean (245 mt), capsicums (437 mt) and squash (59 mt) in 1990 indicate that a market exists for priority items. Exports in 1993 of the mentioned items did not exceed 50 mt (except for green beans at 105.5 mt). Although competition is high and quality standards are stringent, Jordan could try to recapture this market more fully. There is also a good potential for specialty item exports as well as ethnic items, like Jew's mallow and okra, especially given the presence of a significant Arab population in Belgium.

CZECH REPUBLIC

Rating: 5

Economic Indicators

In Czechoslovakia agriculture, which traditionally comprised the bulk of the economy in the pre-communist period, accounted for 7% of the GDP in 1991 and 6% in 1992 (and employing 11% of the total workforce in 1991). The country, after breaking away from the Soviet bloc, preserved international agreements such as the Association Agreement with the EU (which was later replaced by two separate agreements), GATT membership, and inherited membership in international organizations. Before separating to become independent states, the Czech and Slovak governments reached agreements on a customs union and a currency union. However, although the latter fell apart in early February 1993 due to heavy capital outflows in both republics, particularly in the Slovak Republic. New market reforms in both countries are expected to increase international trade, and regulations for fresh produce imports should be relatively lenient in comparison to EU countries.

In the medium-term, the Czech Republic's strong industrial tradition and the government's macroeconomic and structural policies augur well for a successful transition to a privatization based economy and for economic growth once the industrial restructuring has been completed. Low wages and a competitive exchange rate have created an environment conducive to foreign investment.

1989 Arab population: very little presence

1992 total population: 15,731,000

MCC Winter: 0

MCC Summer: 0

Membership: CEFTA

Fruit (existing market)

Jordan supplied only 0.04% (29.3 mt) of Czechoslovakia's total imports of oranges in 1991 and 1992. FAO statistics indicate demands for other fruit: lemons and limes, apples, grapes, and increasing amounts of peaches.

Vegetables

There were no exports of Jordanian vegetables in 1990, 1991 and 1992. 1993 saw the import of 20 mt of Jordanian tomatoes. It is difficult to draw much of a conclusion about vegetable demands in the Czech Republic other than there has been fluctuating imports of onions, potatoes and tomatoes (1990-92).

DENMARK

Rating: 5

Economic Indicators

Denmark joined the EU in 1973 and is renowned as having the toughest environmental legislation in the world. In 1990, its GDP increased by 2.1% reaching over \$108 billion with inflation remaining below 2% in 1991. The GNP per capita in 1991 was \$23,760 rising to \$25,930 in 1992. Agriculture constituted 4.3% of the GDP (1991) while using 65% of the land area and employing 5.7% of the total workforce. Agricultural produce made up 21.1% of exports. Denmark's trading partners in exports and imports (in order of importance) include Germany, Sweden, and the United Kingdom.

1989 Arab population: very little presence

1992 total population: 5,170,000

MCC Winter: 0

MCC Summer: 0

RJ plans to start flying to Copenhagen in 1995.

Membership: EU, EEA

Fruit (existing market)

Jordan supplied this market erratically with small quantities (0 - 2 mt) of priority, specialty and ethnic items scattered over a 4-year period. Priority items included lemons and peaches while specialty items included cherries and sweet melons, and ethnic items included pomegranates, olives and almonds. There is demand in Denmark for mostly for the following priority items: grapes, oranges, tangerines and clementines, and apples. Other demands include pears, peaches and lemons and limes of priority items, and figs, olives and almonds of ethnic items.

Vegetables (existing market)

Jordanian priority and ethnic vegetable exports have been small with a peak in export in 1991; the biggest export in 1991 was of cucumber (33 mt) which dropped to 12.9 mt in 1993. Overall, exports have decreased by 40% over the past four years (1990-93). Jordan has exported cucumbers, eggplant, green beans, capsicums and squash of the priority items consistently; and of the ethnic items, coriander, Jew's mallow, mint, and okra (1990-93) and, most recently (1993), items such as parsley, thyme and vine leaves have picked up albeit in very small quantities each of less than 0.5 mt.

FINLAND

Rating: 5

Economic Indicators

Finland has experienced an average real growth rate of 0.7% from 1985 to 1992. The GNP per capita in 1991 was \$23,930 falling slightly to \$22,980 in 1992. The share of agriculture in GDP 1992 was about 5%. Finland is due to join the EU in January 1995, and Jordan will need to take this into account as it will adopt EU's stringent and protective import policies.

1989 Arab population: very little presence
1992 total population: 5,042,000
MCC Winter: 0
MCC Summer: 0
Membership: EFTA, EEA; EU in 1995

Fruit

Finland is a large importer (+50,000 mt) of apples and oranges from the priority items, and bananas from the specialty items. Between 1990 and 1992, imports of priority fruit remained fairly steady with slight drops in 1991. Import of bananas (specialty item) however, rose from 70,001 mt in 1990 to 86,145 mt in 1992. Imports of dates (ethnic item), though small also rose from 302 mt in 1990 to 405 mt in 1992.

Vegetables

According to FAO statistics, Finland's total imports of onions, potatoes and tomatoes increased from 1990 to 1992. Potatoes in particular saw a dramatic increase from 54 mt to 17,581 mt. Moderate potential exists for the introduction of Jordanian priority vegetables during market windows, and targeting ethnic communities for ethnic vegetables.

HONG KONG

Rating: 6

Economic Indicators

Hong Kong has experienced an average real growth rate of 5.6% from 1985 to 1992. The GNP per capita in 1991 was \$13,580 rising to \$15,380 in 1992. Hong Kong has no agricultural sector. In 1997, British rule of the colony expires, and Hong Kong will return to China. It is unclear yet as to how this will affect the island's prosperous market-based economy. With this in mind, Jordan should approach this market cautiously, identify niches and introduce priority or ethnic items during market windows. Jordan will have to consistently supply high-quality vegetables to compete with nearby Asian producers and exporters, and target market window period for priority fruit and vegetables and ethnic vegetables.

1989 Arab population: very little presence
1992 total population: 5,812,000
MCC Winter: 0
MCC Summer: 0
Membership: APEC

Fruit

Hong Kong experienced a minimal increase in its fruit imports. In 1993, its top three priority fruit imports were oranges (119,402 mt), apples (69,409 mt) and pears (60,984 mt). Average banana (specialty item) imports between 1990 and 1992 totalled 36,601 mt. Imports of dates (ethnic item) rose from 7,524 mt in 1990 to 9,917 mt in 1992.

Vegetables

FAO statistics indicate slight decreases in the imports of onions, potatoes and tomatoes (ranging from approximately 8,000 to 22,000 mt).

HUNGARY

Rating: 6

Economic Indicators

Hungary's economic reform program towards a market economy has brought about major upheavals in agriculture. The program includes increasing import competition

by decontrolling prices and eliminating formal entry barriers. Hungary's per capita GNP in 1992 was \$3,010 with agricultural production accounting for 7% of GDP in 1992 and employing 8% of the total workforce. The economy is a fairly open one - both imports and exports each represent around 35% of GDP. Conditional on successful implementation of the country's stabilization program, GDP growth is expected to resume at 3 to 4% a year from 1994 onwards.

1989 Arab population: very little presence
1992 total population: 10,324,000
MCC Winter: 0
MCC Summer: 0
Membership: CEFTA

Fruit

FAO statistics indicate that Hungary's imports of fruit have dropped with the exception of orange imports, which nearly doubled from 26,370 mt in 1990 to 53,800 mt in 1992. Jordan will have to target market windows for priority, specialty and ethnic items, and supply high quality fruit products.

Vegetables (existing market)

FAO statistics show a 97% rise in Hungary's tomato imports to 2,100 mt (1990-92). Jordan's only vegetable supply to this market was tomatoes which rose from 20 mt in 1991 to 20 mt in 1992 and again to 58 mt in 1993. Economic indicators go some way to suggest that agricultural produce is presently in high demand. It is difficult to make assumptions as to whether priority and specialty items are in high demand or not. The potential of ethnic items may not be worth exploring given the very little presence of an Arab population.

INDONESIA

Rating: 7

Economic Indicators

Made up of over 13,000 islands, Indonesia has a diverse resource base which includes a well-developed system of agricultural commodity production and exports. The activity of this sector is concentrated in the relatively less populated islands of Sumatra and Kalimantan where development programs in the agricultural sector are hoped to relieve much poverty that, in 1990, directly affected 15% of the population. The share of agriculture in 1992 GDP of \$122,825 million was 19%. Indonesia has experienced a steady growth within a stable macroeconomic framework. In the medium term the expected pace and pattern of growth would allow the country to absorb its expanding labor force at higher levels of productivity and income. It is expected that the country will be able to secure an increase in real GDP of almost 70% during the 1990s and raise per capita incomes by over 40% in real terms; per capita GNP rose from \$610 in 1991 to \$670 in 1992.

1989 Arab population: very little presence
1992 total population: 191,170,000
MCC Winter: 2 RJ passenger flights to Jakarta, MCC 8,000 mt
MCC Summer: 2 RJ passenger flights to Jakarta, MCC 8,000 mt
Memberships: ASEAN, APEC

Fruit (existing market)

Jordan supplied this market in 1993 only in small volumes, with exports consisting mainly of priority fruit items, one specialty item (1.4 mt of grapefruit) and one ethnic item (0.3 mt of apricots). Indonesia's total imports of priority fruit items has increased every year since 1990, and serves as a favorable alternative to the European market.

Since Indonesia is known for specialty fruits, Jordan could target the priority fruit market.

Vegetables

FAO statistics show increase in imports of onions, potatoes and tomatoes; potato and tomato imports were low to moderate (6 - 729 mt), while onion imports reached 21,450 mt in 1992. Issues to consider when entering this market is that Indonesia faces a population and poverty problem, and as an ASEAN member, it will prefer to trade with its regional neighbors. Jordan will need to ensure low-cost priority produce to compete. Norway is due to join the EU in January 1995.

IRAN

Rating: 6

Economic Indicators

Iran is facing a large backlog of investment needs arising from a combination of rapid population growth, fast pace of urbanization, especially the growth of Tehran, and the effects of natural disasters and war. The policy reforms, initiated by the government in recent years, focused on methods of strengthening the macroeconomic incentives framework while providing generalized food, fuel and other subsidies to the population, and on privatizing state-owned industries and services. A shift in relative prices towards tradables is one of the sources for growth that would help sustain agricultural and industrial growth; also, increased institutional support could benefit agriculture. In 1992, per capita income is estimated as being \$2,190 with the share of agriculture in GDP at 24% employing around 30% of the total workforce (15 million). Real GDP growth for 1993-97 could, if policies are carried out to plan, average 4-5% per fiscal year. Such a growth would help bring about a modest growth of real incomes and, therefore, consumption per capita. In the medium-term, Iran's import needs are expected to be high as the government further liberalizes the trade regime and undertakes reconstruction and growth-related investments.

1989 Arab population: 1.4 million

1992 total population: 56,964,000

MCC Winter: 0

MCC Summer: 0

Membership: ECO

Fruit

According to FAO statistics, this market's import of banana's (specialty item) rose considerably from 5,500 mt in 1990 to 30,000 mt in 1992. Information regarding priority and ethnic fruit is unavailable. With consideration to relative proximity of this market, Jordan may be able to introduce specialty items into this market.

Vegetables

FAO statistics show insignificant imports of onions, dwindling imports of potatoes to 1,500 mt in 1992, and steady imports of tomatoes at 8,000 mt in 1992. Jordan could enter this market with low-cost ethnic vegetables for Iran's large Arab population. Relative proximity will provide advantage in keeping prices low.

IRELAND

Rating: 5

Economic Indicators

Ireland ranks alongside Spain and Portugal in economic terms although unemployment (at 20% in 1991) remains a major problem. Ireland's agricultural sector concentrates production in meat, dairy and grain and plays a substantial role in the economy accounting for 24% of exports. In 1992, agriculture accounted for 10% of

GDP employing about 15% of the workforce. Principal exports are to the UK and comprise electronic goods, beef and dairy products. Imports from the UK include petroleum products, machinery and transport equipment and chemicals. Other major trading partners are the US, Germany and France. GNP per capita was \$11,150 in 1991 rising to \$12,100 in 1992.

1989 Arab population: very little presence

1992 total population: 3,548,000

MCC Winter: 0

MCC Summer: 0

Membership: EU, EEA

Fruit

FAO statistics indicate an increase of total imports of fruit across all categories. Top three 1992 imports were oranges (priority item) with 35,171 mt, apples (priority item) with 51,032 mt, and bananas (specialty item) with 54,551 mt. As an EU member, Jordan will have to contend with this market's fresh produce import regulations and restrictions. Jordan could introduce priority vegetables to this market, if it can ensure a consistent, high-quality supply.

Vegetables

FAO statistics show this market's imports of onions and tomatoes decreased only slightly. Potato imports rose from 55,228 mt in 1990 to 75,279 mt in 1992. Total imports of all three vegetables ranged from 11,000 to 75,000 mt, indicating a potential market for priority vegetables. As an EU member, Ireland will have strict import regulations, quotas, tariffs, etc., but by targeting market windows with seasonal priority vegetables, Jordan could compete in this market.

KOREA, Democratic People's Republic of

Rating: 5

Economic Indicators

Korea has become the world's eleventh largest trading nation whose exports are wide-ranging in the field of sophisticated industrial products. 1992 GNP per capita was \$6,790 - up 6.9% on 1991. The objective of the government's Five-Year Economic and Social Development Plan (1992-1996) is to establish the foundation necessary to make Korea an advanced country by the end of this century. GNP growth for the present Plan period is expected to range between 7 and 8%, and consumer price inflation is expected to decline to around 3% by 1997. Trade liberalization policies have been successful in all areas except agriculture and services. The government has planned a reduction of the ratio of restricted items for agricultural imports to 8% from about 17% by end-1994. This import liberalization has proved difficult because of the historical importance placed on food self-sufficiency; structural reform of the agricultural sector is seen to conflict with investment goals. The share of agriculture in GDP 1992 stood at 8%. In the medium-term, the main uncertainty for the Korean economy arises from prospects of reunification of the Korean peninsula which, irrespective of its timing, would impose high economic and social costs in the short and medium terms (similar to the German experience).

1989 Arab population: very little presence

1992 total population: 43,663,000

MCC Winter: 0

MCC Summer: 0

Membership: APEC

Fruit

FAO statistics are limited to imports of oranges only. Figures indicate an increase in imports of oranges by 5% from 1990 to 1991, and by 30% from 1991 to 1992. Total orange imports in 1992 reached 3,000 mt.

Vegetables

FAO figures are given for potato imports only, and indicate a 88% from 12,000 mt in 1991 to 1,500 mt in 1992.

MALAYSIA

Rating: 7

Economic Indicators

Malaysia is a multiracial society with 58% of the population Malay and other indigenous groups, 32% Chinese, and the remainder largely of Indian origin. Malaysia has experienced successful development that makes it a "second-generation newly industrialized country" with 1992 GNP per capita at \$2,790. Achievements include poverty alleviation, educational advancement and improved race relations. Previously, the deep division was shown up clearly by the imbalance in income distribution - the Chinese received incomes twice the amount received by Malays. Among its wealth of natural resources are ample reserves of cultivable land. Malaysia has given much attention to agriculture resulting in high productivity gains. These gains have offset the impact of occasional steep commodity price declines on agriculture.

Malaysia's sensitivity to external world political and economic developments is a result of being a small, very open economy - in the past trade shocks have led to recession and prolonged unemployment of an educated and disciplined labor force. The country's 1993 economic growth was expected to moderate to 7.5% as compared with the average of 8.4% over the last six years. Location and cultural ties with Singapore and Taiwan (China) have led to successes with regard to foreign investment in Malaysia. Japan, however, remains Malaysia's biggest trading partner and source of investment, and while Japan undergoes a recession, Malaysia will be significantly affected. Competition from Indonesia, Thailand, China and now Vietnam has increased; and the realization that a diversified market access is important to Malaysia's improved economy has encouraged the Malaysian government to begin improving relations with the EU and North America. In October, 1994, Jordan and Malaysia signed an agreement to mutually promote each others exports of fresh fruit and vegetables (and flowers). This agreement will facilitate Jordan's entry into the market once Jordan has familiarized itself with the cultural tastes of this market.

1989 Arab population: very little presence

1992 total population: 18,792,000

MCC Winter: 2 RJ passenger flights to Kuala Lumpur, MCC 8,000 mt

MCC Summer: 2 RJ passenger flights to Kuala Lumpur, MCC 8,000 mt

Membership: ASEAN, APEC

Fruit

Malaysia saw an overall increase in the imports of priority fruit items. In 1992, its top three priority fruit imports were oranges (53,963 mt), apples (28,154 mt) and pears (13,099 mt). Imports of bananas (specialty item), though small, jumped from 39 mt in 1990 to 88 mt in 1992. Dates imports (ethnic item) was reduced from 10,002 mt in 1990 to 7,787 mt in 1992. Following the agreement, Jordan can begin by supplying priority fruit and ethnic items. Specialty items could be introduced at a later stage, when Jordan becomes established in the market, and niche markets are identified.

Vegetables

According to FAO statistics, during the period 1990 to 1992 Malaysia's imports of onions increased by 22% to 152,969 mt. Its potato and tomato imports both dropped slightly in 1991 and rose again in 1992 to 66,056 mt and 5,417 mt respectively. Jordan exported insignificant amounts of cucumbers (0.6 mt) and green beans (0.5 mt) in 1992 only, and, as such, Malaysia should be treated as a new market.

NORWAY

Rating: 5

Economic Indicators

Norway has experienced an average real growth rate of 0.2% from 1985 to 1992. The GNP per capita in 1991 was \$24,090 rising to \$25,800 in 1992. The share of agriculture in GDP 1992 was about 3%. Norway is due to join the EU in January 1995.

1989 Arab population: very little presence

1992 total population: 4,286,000

MCC Winter: 0

MCC Summer: 0

Membership: EFTA, EEA; EU in 1995

Fruit

Norway saw a slight rise in its fruit imports between 1990 and 1992. Its top three priority fruit imports were oranges (58,111 mt), apples (35,915 mt) and grapes (18,647 mt). Banana (specialty item) imports rose to 61,243 mt and dates (ethnic item) imports rose to 209 mt in 1992. Jordan could target market windows for priority and specialty fruit items. A very small Arab community presents limited potential for ethnic fruit items.

Vegetables

FAO statistics show onions, potatoes and tomatoes imports increased by large margin: 7,240%, 553% and 17% respectively. Jordan must target market windows for priority and specialty vegetable items.

PAKISTAN

Rating: 7

Economic Indicators

A poor country suffering from inadequate implementation of compensatory policy measures. It relies greatly on financing from foreign currency deposits. This results in an economy vulnerable to external political and economic shocks. Overall, Pakistan's growth performance has been strong, with GDP growing about 6.5% a year in real terms for most of the 1980s. This performance is, in part, due agricultural production that averaged over 4% of GDP in the 1980s; by 1992 the share of agriculture in GDP had increased 26%. Despite this growth, poverty is widespread with per capita income at \$410 in fiscal 1992. The benefits of growth have been unequally shared and population growth of over 3% has increased pressures on the environment and constrained rapid improvements in living standards. Predictions for 1993 were that Pakistan's economic performance would be weaker than previous years. One of the reasons is the September 1992 floods which resulted in substantial loss of life, widespread damage to crops, infrastructure and property, with damages estimated at \$2.4 billion. GDP growth for 1993 was projected at only 3%, as opposed to the original expected growth of 4.6%. This mainly reflects losses in cotton rice, and sugar cane. Over the medium term growth is expected to remain strong and return to an average of 6% if policy reforms are adhered to and macroeconomic management improves.

1989 Arab population: 65,000
1992 total population: 119,107,000
MCC Winter: 2 RJ passenger flight to Karachi, MCC +5,333.3 mt
1 PK flight to Karachi, MCC 4,666.6 mt
MCC Summer: 1 RJ passenger flight to Karachi, MCC 5,333.3 mt
1 PK flight to Karachi, MCC 4,666.6 mt
Membership: ECO, SAARC

Fruit

Pakistan is being treated as a new market because Jordan has barely exported anything except for 0.1 mt of mango exports in 1993. FAO statistics reveal small volumes of priority fruit imports to Pakistan. However, 1990 import of 42,482 mt of dates indicate a potential opportunity for introducing Jordanian ethnic fruit items particularly given the presence of a small Arab community.

Vegetables

FAO statistics indicate this market imported 790 mt of onions in 1991 only, and that there were no tomato imports during 1990-1992. Potato imports increased by eleven times to 7,125 mt in 1992. Jordan can compete in this market by supplying it with seasonal priority vegetables and ethnic vegetables that are not consistently available in the market.

POLAND

Rating: 6

Economic Indicators

In 1989 Poland took the lead among Eastern European countries in transition toward an open market economy. Like other former members of the Soviet Union, the Polish economy experienced certain external shocks, notably the demise of the Soviet Union and Soviet bloc trading arrangements. After two very difficult years of adjusting, economic conditions in Poland improved during 1992; GNP per capita rose from \$1,790 in 1991 to \$1,960 in 1992. More sustained growth was expected for 1993 although it masked a sharp differential in the performance of the private sector (which took advantage of an opening economy) and the state-owned enterprise sectors. Overall, about half of Poland's GDP is produced by the private sector. The macroeconomic program for 1993 envisaged overall output growth of 3-4%, although the current account of the balance of payments were expected to deteriorate mainly as a result of the drought on agricultural exports and higher growth in imports. In 1991, agriculture accounted for less than 7% of GDP and employed about 26% of Poland's well educated and highly skilled workforce (which totals 19 million). In 1992, the share of agriculture in GDP had fallen again to 6%.

1989 Arab population: small community
1992 total population: 38,365,000
MCC Winter: 0
MCC Summer: 0
Membership: CEFTA

Fruit

Jordan's exports to this market which consisted of 4 - 5 mt of 2 priority items and one specialty item, disappeared completely by 1993. This has been the case while Poland's total imports of priority fruit items have increased between 1990 and 1992. The small Arab community could be explored with the view to supplying it with Jordanian ethnic fruit produce.

Vegetables (existing market)

In the past, Poland has been a Jordanian priority vegetable market only and in very small quantities; the biggest export was of capsicums (10.3 mt). During the period 1990 to 1993, the range of priority vegetables diminished from four items (eggplant, green beans, capsicums, tomatoes) to one (tomatoes). However, tomato exports have increased by 74.5% (1990) to 38 mt (1993). The small Arab community could be explored with the view to supplying it with Jordanian ethnic fruit produce.

ROMANIA

Rating: 6

Economic Indicators

Like Bulgaria and Poland, Romania has already started the process of transforming itself into a market economy. Although progress in large-scale privatization and financial discipline has been very limited, significant progress has been made in small-scale privatization including 65% of agricultural land. Romania has a wide range of natural resources of which a fertile agricultural base is one. Long a major food producer, the country was a net exporter of agricultural products until the early 1980s. The loss of Soviet trading and payments bloc led to a fall in 1992 GDP of 32%, and exports and imports have roughly halved in value since 1989. Romania has been facing serious difficulties in financing its energy, raw material, and food requirements. Although income levels have been declining (from \$1,400 in 1991 to \$1,090 in 1992), income is more evenly distributed than in most middle-income developing countries and chronic long-term poverty is not seen as a major problem. Growth in the medium-term is promising due to the absence of debt and a literate and skilled workforce earning moderately low wages. Therefore, assuming steady and effective reform implementation, output growth could increase to 4% a year by 1996 and stay at 4-5% thereafter.

1989 Arab population: very little presence

1992 total population: 22,748,000

MCC Winter: 1 RO passenger flight to Bucharest, MCC n/a

MCC Summer: 1 RO passenger flight to Bucharest, MCC 2,666.6 mt

Fruit (existing market)

Jordan began supplying this market in 1991 with exports increasing in leaps, peaking in 1992 (391.8 mt) and then falling to 287.2 in 1993. The main priority fruits in 1993 were: lemons (100.5 mt), oranges (36.5 mt), grapefruit (11.0 mt) and watermelons (139 mt). Other exports included smaller quantities of specialty fruit items: strawberries (0.2 mt). Romania's total imports of priority fruit are inconsistent, but they remain significant enough in volume for Jordan to consider it as a market for priority fruit items (11,000 mt of lemons and 39,277 mt of oranges in 1993).

Vegetables (existing market)

Jordan began supplying this market in 1992 at a total of 452.3 mt and rising by 15% to 530 mt. The best performing vegetables are of the priority vegetable category and include cucumbers, eggplant and tomatoes as well as cauliflower, capsicums and cabbage (eggplant and tomatoes being the two main exports 1991-92). Items of the ethnic category were only first exported in 1993 and constituted garlic (7 mt) and parsley (0.2 mt). This indicates that a market exists for ethnic items, however it is too early to decipher a trend.

SINGAPORE

Rating: 7

Economic Indicators

Singapore has experienced an average real growth rate of 5.9% from 1985 to 1992. The GNP per capita in 1991 was \$14,140 rising to \$15,750 in 1992. The share of agriculture in GDP 1992 was 0%.

1989 Arab population: very little presence

1992 total population: 2,818,000

MCC Winter: 2 RJ passenger flights to Singapore, MCC 8,000 mt

MCC Summer: 2 RJ passenger flights to Singapore, MCC 8,000 mt

Membership: APEC, ASEAN

Fruit

Fruit imports to Singapore between 1990 and 1992 rose for the most part. Top three priority fruit were oranges (75,192 mt), apples (42,398 mt) and pears (31,419 mt). Banana (specialty item) imports rose to 35,849 mt and date (ethnic item) imports dropped to 5,937 mt in 1992. Jordan will face competition in this market from East Asian countries which operate as a trading bloc and are more familiar with the cultural taste of their neighbor. Jordan would do best by entering the market with standard priority fruit items, and ethnic fruit items that are not available in Singapore.

Vegetables

FAO statistics indicate that between 1990 and 1992, onion imports rose by 4% to 67,302 mt, tomato imports rose by 23% to 6,234 mt. Potato imports, on the other hand, dropped by 16% to 12,905 mt. Although Singapore is a large importer in terms of volume in comparison to its neighbors, Jordan will face competition in this market from ASEAN member countries which have a free trade agreement in the region. Jordan would have to target market windows for priority and specialty fruit item, and price its vegetables competitively.

SWEDEN

Rating: 5

Economic Indicators

Sweden has experienced an average real growth rate of 0.4% from 1985 to 1992. The GNP per capita in 1991 was \$25,180 rising to \$26,780 in 1992. The share of agriculture in GDP 1992 was about 2%. Sweden is due to join the EU in January 1995.

1989 Arab population: very little presence

1992 total population: 8,668,000

MCC Winter: 0

MCC Summer: 0

Membership: EFTA, EEA; EU in 1995

Fruit (existing market)

The export of Jordanian fruit to Sweden, though small in volume (0.1-7 mt), increased in range from 1 product in 1990 to 6 in 1993, distributed evenly among priority (grapes, peaches), specialty (cherry, melon) and ethnic items (pomegranate, almond). For the most part, Sweden's demand for priority fruit (and ethnic item-dates) has increased steadily since 1990.

Vegetables (existing market)

Jordan supplies this market with a variety of priority and ethnic items in minimal quantities (0.1 - 50 mt). In 1993, top three priority exports were cucumbers (43.3 mt),

squash (31.7 mt) and eggplants (23.4 mt). Top three ethnic vegetable exports were okra (5.2 mt), Jew's mallow (4.8 mt) and coriander (3.9 mt). Having penetrated the market in varying degrees, Jordan could increase its market shares of already existent priority and ethnic vegetable exports.

SWITZERLAND

Rating: 7

Economic Indicators

Switzerland has experienced an average real growth rate of 1.1% from 1985 to 1992. The GNP per capita in 1991 was \$33,710 rising to \$36,230 in 1992. The share of agriculture in GDP 1992 was small.

1989 Arab population: very little presence

1992 total population: 6,875,000

MCC Winter: 2 RJ passenger flights, MCC 9,333.3 mt

MCC Summer: 2 RJ passenger flights, MCC 9,333.3 mt

Membership: EFTA

Fruit

This market's overall fruit imports remained steady between 1990 and 1992. Top three priority fruit imports were oranges (100,603 mt), grapes (36,514 mt) and peaches (33,304 mt). In 1992, banana (specialty item) imports rose to 78,781 mt, and date (ethnic item) imports rose to 1,406 mt. Jordan should target market windows for priority and specialty fruit.

Vegetables (existing market)

Jordanian vegetables appear in this market in 1991 only and in small amounts (1 - 19 mt). They include cucumber, green beans, capsicums and squash. According to FAO statistics, Switzerland's imports of onions increased by 69% between 1990 and 1992, reaching 4,523 mt. For the same period, tomato imports increased by 7% to 36,688 mt. Potato imports, after a slight rise in 1991 to 9,285 mt, dropped the following year to 8,649 mt. Jordan could increase its share of the priority vegetable markets, targeting market window periods.

THAILAND

Rating: 7

Economic Indicators

By the end of the 1980s, Thailand was one of the fastest growing economies in the world. The economy has been transferred from dependence on natural resources and agriculture to industrial production and services; agriculture's share has been overtaken by the manufacture sector and has now declined to about 12% (1992). This diversification has given the country a more stable base of economic activity that can better cushion it from external shocks; GDP growth in 1991/92 was 8% despite a deepening recession in the world economy. Rapid economic growth has led to improved income levels for most sections of the population, albeit unequally distributed; GNP per capita was \$1,650 in 1991 rising to \$1,840 in 1992. Many farm households are also facing increasing problems of access to principal factors of production: irrigation water (following a series of drought years in the north) and land. In the medium-term, prospects are good as a result of strong economic performance over the past five years and the creation of a fertile economic environment that should encourage private sector-led industrial growth.

1989 Arab population: very little presence

1992 total population: 57,760,000

MCC Winter: 3 RJ passenger flights to Bangkok, MCC 12,000 mt
MCC Summer: 3 RJ passenger flights to Bangkok, MCC 12,000 mt
Membership: ASEAN, APEC

Fruit

Apples were Thailand's most significant priority fruit imports, rising from 23,571 mt in 1990 to 26,230 mt in 1992. Imports of pears rose from 1,606 mt in 1990 to 1,821 mt in 1992. Remaining priority fruit items (grapes, peaches and oranges) fell under the 1,000 mt mark. Thailand's overall imports is small compared to its richer neighbors such as Singapore. Jordanian priority fruit can try to get a share of growing priority fruit imports, such as grapes which have nearly tripled from 317 mt in 1990 to 845 mt in 1992. Ethnic fruit may also be supplied to Thailand's very small Arab community. Distance is an important factor to consider.

Vegetables

FAO statistics show no imports of tomatoes, a drop in onion and potato imports to 50 mt and 7,369 mt respectively. Thailand is a relatively poor nation, and is likely to import vegetables from fellow ASEAN members. Jordan will need to identify specific product demand of priority vegetables and supply low-cost produce to this market. It can also address the needs of the large ethnic population, and introduce its ethnic vegetables.

3.2 Arab Markets with Marginal Potential

LEBANON

Rating: 7

Economic Indicators

Lebanon, which used to be one of the most economically prosperous countries in the Middle East until mid 1970's, has been torn apart by civil war which caused an estimated damage of \$25 billion. Prior to the war, Lebanon's economy, dominated largely by service industries, grew at an average of 6% per year. International banking, transit trade, tourism, (and to a lesser extent) exports of agricultural and manufactured goods contributed largely to the economic development. Violent fighting ceased in 1990, and the government was left with the difficult task of rebuilding both the physical and social infrastructure. In 1990, Lebanon's GNP per capita was only one-third of what it was in 1975. By 1991, the government managed to reduce inflation rate and currency depreciation in the short term. Other issues of priority include gathering private and official funds for reconstruction programs, rebuilding transport, power and telecommunication infrastructure, and improving health, sanitary and education standards.

Presently, agriculture constitutes 10% of GDP and 20% of exports. As it continues to develop this sector, Lebanon remains a net importer of agricultural and food products. Economic growth of this market will rely on economic, political and social stability, with active participation from both the public and private sectors.

1992 total population: 2,838,000

MCC Winter: 6 ME passenger flights, MCC 5,333.3 mt
4 RJ passenger flights, MCC 2,666.6 mt
MCC Summer: 1 AF passenger flight, MCC 5,000 mt
5 ME passenger flights, MCC 6,666.6 mt
6 RJ passenger flights, MCC 6,000 mt

Fruit (existing market)

Since 1990, Jordan's total fruit exports to Lebanon peaked at 20,665 mt in 1991 and was drastically reduced to 8,048 in 1993. The drop can be traced to a cut in watermelon (priority item) exports which stood at 20,361 mt in 1991, and at 7,675 in 1993. On the other hand, exports of melons (specialty item) increased sevenfold from 55 mt in 1990 to 353 mt in 1993. It appears that Lebanon is a market for select items only: oranges, tangerines, clementines, watermelons, melons, dates, olives and almonds.

Vegetables (existing market)

Mainly a market for Jordanian priority vegetables, and some ethnic vegetables. Total Jordanian exports to this market remained fairly steady, with little fluctuations, reaching 49,882 mt in 1993. Jordan's market share of onions, potatoes and tomatoes decreased slightly. Its supply of ethnic vegetables, however, fluctuated greatly. Favorite items include tomatoes, eggplant, cucumbers and squash of the priority items, and okra of the ethnic items. It is worthy of note that 805.6 mt of fava beans were exported to Lebanon in 1993.

3.3 Foreign Markets with Strong Potential

CANADA

Rating: 8

Economic Indicators

A stable economy with an average inflation rate of 3.7% (1985-1992) and a real growth rate of 0.3% (1985-1992). In 1992, its GNP was \$565,787 million and the share of agriculture in GDP was 2%. Distance, air freight costs and handling fees need to be born in mind with regard to exports from Jordan.

1989 Arab population: 80,000

1992 total population: 27,367,000

MCC Winter: 2 RJ passenger flights to Montreal, MCC 4000 mt
2 RJ passenger flights to Toronto, MCC 4,000 mt

MCC Summer: 2 RJ passenger flights to Montreal, MCC 4000 mt
2 RJ passenger flights to Toronto, MCC 4,000 mt

Membership: APEC, NAFTA

Fruit (existing market)

Fruit exports from Jordan to this market has been minimal with 0.1 mt of oranges in 1991 and two ethnic items in 1992 and 1993 (figs and pomegranate). FAO statistics (1990-92) indicate a demand for priority fruit (in order of imports by quantity): oranges, tangerines and clementines (214,035 mt), grapes, apples, peaches, pears and then lemons and limes (30,947 mt). Canada's Arab population, although small, is concentrated in Montreal and Toronto, and warrants exporting additional ethnic items. Canada has imported an average total of 5,899 mt of dates per year (1990-92). This ethnic item is presently produced by Jordan and, quality permitting, could enter the Canadian ethnic market.

Vegetables (existing market)

A little expanded market consisting primarily of priority vegetable items with Jordanian cucumber imports increasing by 13 mt over 4 years to 21 mt (1993). Two ethnic items in very small quantities were exported by Jordan in 1993: Jew's mallow (0.3 mt) and okra (0.9 mt). Jordanian priority vegetables could be improved while specialty and ethnic items could be introduced gradually.

FRANCE

Rating: 9

Economic Indicators

A founder member of the EU. Nearly 80% of the population is Roman Catholic with strong Muslim and Jewish communities in urban areas. Overall the French economy has proven itself strong; the GDP in 1990 at \$1,007 billion with agriculture providing 3.5% compared with industry which provided 30.6%; in 1992 agriculture's share of GDP fell by 0.5%. The main EU trading partner is Germany; others include Italy, Belgium, Luxembourg and the Netherlands. The GNP per capita was \$20,460 in 1991 rising to \$22,300 in 1992.

1989 Arab population: 2 million

1992 total population: 57,372,000

MCC Winter: 3 RJ passenger flights to Paris, MCC 7,333.3 mt
3 AF passenger flights to Paris, MCC 10,000 mt

MCC Summer: 3 RJ passenger flights to Paris, MCC 10,666.6 mt
3 AF passenger flights to Paris, MCC 15,000 mt

Membership: EU, EEA

Fruit (existing market)

Jordan's export of all fruit items has been consistently weak; the most that was exported was in 1991 totalling 6.2 mt of which pomegranate (ethnic item) was 5 mt. FAO figures show France as importing large amounts of priority fruit items plus increasing amounts of dates (19,106 mt in 1992). France has the largest Arab population in Europe, and as such, there is a significant potential for the export of ethnic fruit items.

Vegetables (existing market)

By 1993, Jordanian priority vegetable exports to France had decreased hugely since 1990; cucumber exports have fallen by over 51% (241.2 mt to 117.7 mt) and capsicum exports have decreased by over 96% (354.2 mt to 12.2 mt). Main priority items exported have been cucumbers, squash, green beans, capsicums and (in smaller quantities) eggplant. There were signs in 1993 of ethnic vegetable items gradually having penetrated the French market.: Jew's mallow (3.8 mt) and okra (2.3 mt) in 1993. Given the large Arab population in France, this ethnic market appears to have a better potential than the priority and specialty markets where competition is very high.

GERMANY

Rating: 9

Economic Indicators

The unification of the Federal Republic of Germany and the German Democratic Republic took place in 1990. The costs have been significant and will continue to have important ramifications for the EU economy; by the end of 1991, inflation was 4.5%. The overall trade balance has since steadied at around \$6 billion. In 1990, the GDP was \$1,744.5 billion with agriculture providing 1.8% and employing 3.9% of the total workforce. By 1992, the share of agriculture in GDP had fallen to 1%. The GNP per capita was \$20,510 in 1991 rising to \$23,030 in 1992. Its main export destination is France and its main import source is the Netherlands.

1989 Arab population: small community

1992 total population: 80,569,000

MCC Winter: 2 RJ passenger flights to Berlin, MCC 9,333.3 mt
4 RJ passenger flights to Frankfurt, MCC 10,333 mt

MCC Summer: 2 RJ passenger flights to Berlin, MCC 9,333.3 mt
4 RJ passenger flights to Frankfurt, MCC 13,000 mt

Membership: EU, EEA

Fruit (existing market)

A variety of priority, specialty and ethnic fruit from Jordan exist in the German market in small quantities (0.1-10 mt). They include grapes, lemons, oranges, peaches, grapefruits, and watermelons for priority items, cherries, guavas, papayas and melons for specialty items, and figs, pomegranates, olives and almonds for ethnic items. Although the volume remained small, the variety of exported fruit items doubled in 1993 from the previous year. Ethnic items increased slightly in 1993 from the previous year as well. Although there is a small Arab community in Germany, there also exists a substantially large Turkish presence that could be targeted on the grounds that Turkish societies and Arab societies share similar food tastes. The competition for exporting priority and specialty fruit items is tough, but Jordan could supply this market with high quality items during market windows.

Vegetables (existing market)

Jordanian priority and ethnic vegetables exist in the German market at a fairly steady rate, although there has been a significant decrease in Jordan's exports (1990-93) of eggplant (44%), beans (78.5%), tomatoes (99%), and capsicums (85.5%). With regard to tomatoes (1990-1992), while Jordan's exports to Germany have decreased by 98%, Germany's imports have increased by 13% to 569,608 mt. On the other hand, Jordanian ethnic exports to Germany have picked up greatly, especially exports of mint (0.2 to 5.1 mt), Jew's mallow (2.0 to 5.2 mt), okra (1.7 to 3.5 mt), and thyme (0.1 to 0.6 mt). Better quality produce could play a part in increasing exports of priority items and enhance exports of ethnic items. In the specialty item category, it is known that Germany is a large consumer of asparagus, both the white and green variety.

ITALY

Rating: 9

Economic Indicators

Reform of the public sector sits high on Italy's agenda since this sector accounts for 60% of the economy (which was saddled with a deficit of under \$1 billion due partly to growth in imports). The GNP per capita in 1992 was \$20,510; agriculture accounted for 3% of GDP 1992 employing 9.2% of the workforce.

Italy's main export destination and import source is Germany. Other main trading partners are France, the UK and the US. Its exports comprise of machinery and transport equipment, clothing and footwear, basic manufactures and chemicals. Principal imports include machinery and transport equipment and basic manufactures.

1989 Arab population: small community

1992 total population: 56,777,000

MCC Winter: 4 AZ passenger flights to Rome, MCC 16,666.6 mt
3 RJ passenger flights to Rome, MCC 10,666.6 mt

MCC Summer: 4 AZ passenger flights to Rome, MCC 16,666.6 mt
3 RJ passenger flights to Rome, MCC 7,333.3 mt
1 RJ passenger flight to Milan, MCC 2,000 mt

Membership: EU, EEA

Fruit

Between 1990 and 1992 Italy experienced an irregular pattern of drops and rises in its fruit imports. Its top three imports in 1992 were bananas (475,000 mt), pears (116,127 mt) and apples (59,056 mt). Imports of dates (ethnic item) was reduced by nearly half from 9,668 mt in 1990 to 5,131 mt in 1992. In supplying this market, Jordan will face

competition and protectionist policies. It would do best to target market windows for priority and specialty fruit.

Vegetables

FAO statistics show fluctuating imports of onions and potatoes ranging from 12,000 to 50,000 mt, and rapidly increasing imports of tomatoes. Potato imports, though down from the previous year, reached an impressive 412,347 mt in 1992. Italy is an EU member as well as a major supplier of fresh produce for Europe. To enter in this market, Jordan will need to supply competitively priced, high quality priority and ethnic vegetables during market window periods. Frequent flights and proximity provide an added advantage for Jordan.

JAPAN

Rating: 8

Economic Indicators

Japan has experienced an average real growth rate of 4% from 1985 to 1992. The GNP per capita in 1991 was \$26,840 rising to \$28,220 in 1992. The share of agriculture in GDP 1992 was about 2%. The average inflation rate (1985-1992) was low at 1.4%. Jordan should consider several issues in approaching this market: first, as an industrialized nation, Japan will enforce high quality standards towards agricultural imports; secondly, it is more likely to cooperate with fellow APEC members and neighbors for trade, as part of their regional policy; thirdly, in view of the distance involved, Jordan would need to ensure reasonably priced, high quality products (during market window periods) for this market in order to compete.

1989 Arab population: very little presence

1992 total population: 124,336,000

MCC Winter: 0

MCC Summer: 0

Flights are planned to begin in 1995.

Membership: APEC

Fruit

In 1992, Jordan's top three priority fruit imports were oranges (171,921 mt), lemons (93,416 mt) and grapes (7,732 mt). Out of the three, oranges were the only ones that registered an increase since 1990. Imports of bananas (specialty item) remained steady at 4,800 mt from 1990 to 1992. Imports of dates (ethnic item) jumped from 139 mt in 1990 to 606 mt in 1992.

Vegetables

According to FAO statistics, onions were the only significant imports out of the three listed priority vegetables. Even then, it rapidly decreased from 86,882 mt in 1990 to 35,442 mt in 1992. Exporting vegetables to this market will require careful assessment, adapting crops to suit its cultural tastes and supplying low-cost, high quality vegetables to compete with Asian producers in the region. Planned RJ flight to Japan in 1995 will facilitate vegetable exports.

THE NETHERLANDS

Rating: 8

Economic Indicators

The Netherlands, a founder member of the EU has experienced an increase in GDP of 4.3% to \$223.7 billion in 1989 which was followed the next year by a real growth rate of 3%. Agriculture constituted 7.7% of the GDP (1990) while employing 4.8% of the total workforce. By 1992, that share decreased to 4% of GDP. In an economy that

strongly relies on agriculture, the main crops produced are sugar beet, potatoes, cereals, vegetables and fruit. Horticulture accounted for 2.9% of export earnings in 1990. The GNP per capita was \$18,840 in 1991 rising to \$20,590 in 1992. Its main trading partner in exports and imports is Germany.

1989 Arab population: very little presence

1992 total population: 15,178,000

MCC Winter: 7 KLM passenger flights to Amsterdam, MCC 32,666.6 mt
2 RJ cargo flights to Amsterdam, MCC 33,333.3 mt
7 RJ passenger flights to Amsterdam, MCC +10,666.6 mt
2 RJ cargo flights to Maastricht, MCC 34,000 mt

MCC Summer: 7 KLM passenger flights to Amsterdam, MCC 32,666.6 mt
2 RJ cargo flights to Amsterdam, MCC 33,333.3 mt
7 RJ passenger flights to Amsterdam, MCC +10,666.6 mt
4 RJ cargo flights to Maastricht, MCC 67,333.3 mt

Membership: EU, EEA

Fruit (existing market)

Jordanian fruit exports to this market has been limited to small volumes of two priority items (grapes and pears) since 1990. Exports of grapes have increased by 93% to 121.4 mt in 1991-93, and most significantly in the last fiscal year. FAO figures indicate a growing demand for the following priority items: grapes, lemons and limes, oranges, tangerines and clementines, peaches, and pears. Little information can be drawn with regard to specialty items and ethnic items other than the Netherlands has imported consistent amounts of dates - an average of 1,461 mt 1990-1992.

Vegetables (existing market)

Jordan's exports to the Netherlands have almost disappeared. In 1993, Jordan's exports totalled 0.1 mt of cucumber and 3.9 mt of eggplant. There has never been any penetration into the Dutch market of Jordanian specialty or ethnic items. FAO statistics (1990-92) indicate increased total imports of potatoes by 30% to 1.23 million mt and of tomatoes by 38% to 137,371 mt but a decrease in total imports of onions by 33% to 52,585 mt.

RUSSIAN FEDERATION

Rating: 8

Economic Indicators

Following the collapse of the Former Soviet Union (FSU) and its dissolution into 15 independent states, the Russian government set about transforming the remnants of the command economic structure towards a market-oriented economy based on private property ownership. Progress in privatization has been made in medium and large state enterprises but privatization of farms made limited progress during 1992. Overall in the short to long term, the problems facing the government are many and the transformation process will be protracted in view of the large structural distortions in the economy and the \$12 billion (end-1992) accumulated arrears. In 1992, exports and imports with countries outside the former FSU fell by 22% and 17%, respectively. This decline led to a fall in real GDP by a further 19% in that year. The GNP per capita in 1991 was \$3,470 falling by 23% to \$2,680 in 1992. Rapid inflation and the continuing contraction of the economy have resulted in a significant number of people falling below the poverty line in late 1992. Gross agricultural output declined by about 8%, primarily reflecting a sharp drop in livestock production, whereas grain production increased by 20% due to good weather. The share of agriculture in GDP 1992 was about 12%. This market is new to the world of international trade and as such is facing problems adjusting to a suitable system for terms of trade. Monitoring of developments will help in assessing its potential as a market for fresh produce.

1989 Arab population: very little presence
1991 total population: 148,624,000
MCC Winter: 1 SU passenger flight to Moscow, MCC 2,666.6t mt
MCC Summer: 1 RJ passenger flight to Moscow, MCC 4,666.6 mt
1 SU passenger flight to Moscow, MCC 2,666.6t mt

Fruit (existing market)

Jordanian fruit exports only entered this market in 1993 with three priority items: 136.3 mt of lemons, 10.7 mt of oranges and 0.1 mt of pomelos. FAO statistics are incomplete and indicate only that in 1991, there was a demand for large volumes of apples, lemons and oranges.

Vegetables (existing market)

Jordan began exporting vegetable items to the Russian Federation in 1993. A relatively new market with small amounts of Jordanian priority vegetables reaching the Russian market the largest of which has been eggplant (4.3 mt in 1993). FAO figures show erratic imports of onions and imports of potatoes beginning in 1991 at 637,375 mt per year.

SPAIN

Rating: 8

Economic Indicators

Spain joined the EU in 1986. Having experienced an estimated growth of 3.6% in 1990, the country's GDP was \$524.4 billion in 1991. Unemployment stood at 15.4% in 1991 with gross external debt at \$43.8 billion in December 1990. In 1992, the share of agriculture in GDP was 4% employing about 13% of the workforce. The GNP per capita in 1992 was \$14,020. Spain's main export destination is France while its main import source is Germany. Other leading trade partners are Italy, the UK and the US. Exports include cars, machinery, agricultural produce and iron and steel goods, while imports include mineral fuels and petroleum products, machinery, electrical equipment, vehicles and chemical products. Morocco holds strategic and historical importance for Spain and, as a result, the two countries share many trading interests. Spain is a major fresh produce supplier to the EU, and is actually Jordan's competitor. Jordan can best enter this market during market windows, and would have to compete with other Mediterranean suppliers who usually supply Spain in terms of price, timing and consistency. To supply this market, Jordan will have to adhere to EU quality regulations on agricultural imports and target market windows for all categories of vegetables: priority, specialty and ethnic.

1989 population: small community
1992 total population: 39,085,000
MCC Winter: 2 RJ passenger flights to Madrid, MCC 9,333.3 mt
MCC Summer: 3 RJ passenger flights to Madrid, MCC 14,000 mt
Membership: EU, EEA

Fruit

Spain's imports of priority fruit increased significantly between 1990 and 1992. Top three priority fruit in 1992 were apples (211,482 mt), pears (44,439 mt) and peaches (7,127 mt). Date (ethnic item) imports averaged 2,812 mt during this period, and specialty fruit imports were insignificant (144 mt of bananas in 1992).

Vegetables

According to FAO statistics Spain is a huge market for potato growers, with total imports in 1992 reaching 358,425 mt in 1992. For the same year, onion imports totalled 43,838 mt and tomato imports 15,819 mt.

TURKEY

Rating: 8

Economic Indicators

Following its adjustment program of the 1980s, the major economic challenge facing Turkey in the 1990s include stabilization and acceleration of productivity growth. Turkey still has almost half of its workforce in agriculture, a high unemployment rate, and a rapidly growing population. However, the country is in a strong position to meet these challenges; it is endowed with a robust and outward-oriented economy with a dynamic private sector. The country has gained substantial market access and has succeeded in developing strong and broad-based trading links with its European and Middle Eastern trading partners. The OECD countries are Turkey's main trading partners, representing about two-thirds of both exports and imports. It is also actively exploring trade links with the new republics of Central Asia. Turkey has experienced an average real growth rate of 2.7% from 1985 to 1992. The GNP per capita in 1991 was \$1,790 rising to \$1,950 in 1992; however, income inequality is high. The share of agriculture in GDP 1992 was about 18%.

1989 Arab population: 670,000

1992 total population: 58,775,000

MCC Winter: 2 RJ passenger flights to Istanbul, MCC 2,666.6 mt

2 TK passenger flights to Istanbul, MCC n/a

MCC Summer: 5 RJ passenger flights to Istanbul, MCC 6,666.6 mt

2 TK passenger flights to Istanbul, MCC 10,666.6 mt

Membership: ECO

Fruit

Turkey's priority fruit imports have been erratic between 1990 and 1992. Apple imports jumped from 57 mt in 1990 to 24,356 mt. Orange imports rose to 6,737 mt (1991-92). On the other hand, ethnic fruit imports, dates in particular, dropped vastly from 20,441 mt to 5,048 mt in 1992. These fluctuations could be attributed to economic situations and Turkey's own crop production. Turkey is one of Jordan's competitor in the European market in terms of fresh produce exports. As an EU supplier, Turkey would be familiar with quality products. To export to this market, Jordan will have to identify market niches and target market windows with priority and ethnic fruit products.

Vegetables (existing market)

In 1990, Jordan supplied this market with eight priority vegetables, the top three exports being tomatoes (1131.7 mt), eggplants (165.3 mt) and capsicums (60.4 mt). Jordanian vegetable exports to Turkey dropped dramatically in 1992; the only items exported were eggplant (65 mt) and capsicum (28.8 mt). However, in 1993 imports of Jordanian priority vegetables picked up substantially, totalling 4065 mt - a 66% increase on total Jordanian imports of 1990. FAO statistics indicate, on the other hand, that Turkey's imports of onion, potatoes and tomatoes plunged in 1991 and increased slightly the following year (with the exception of tomatoes, which were not imported at all that year). But 1992 levels remained well below what they were in 1990. This market's vegetable imports is irregular, and Jordan will need to monitor the market situation in order to maintain its market share of priority vegetables. In regard to specialty vegetables, three of the items listed (asparagus, broccoli, mushroom) in this study are not indigenous to Turkey, and so would be difficult to market there. Taking

into consideration that Turkish food tastes are similar to that of Arabs, it is difficult to assess the demand for ethnic items by the small Arab community present in Turkey.

UNITED KINGDOM

Rating: 9

Economic Indicators

Since 1991, the UK economy has undergone a deep recession that has proved difficult to overcome given the state of the world market from 1991 to 1993. A major international center for business and financial services, while agriculture, forestry and fishing provided only 1.5% of 1990 GDP. In 1991, the GDP was \$1,077.4 billion with agriculture, forestry and fishing providing 1.5% employing 2.2% of the total workforce compared to the banking, finance and insurance sector which provided 18.3% of 1990 GDP. The share of agriculture in GDP 1992 was about 2%. Its main exports are various machinery and road vehicles, and main imports are road vehicles, various machinery, petroleum, paper, manufactures and textiles. Its main export destination is the United States and its main import source is Germany. Other trading partners include France, the Netherlands and Italy. The UK has experienced an average real growth rate of 1.5% from 1985 to 1992. The GNP per capita in 1991 was \$16,600 rising to \$17,760 in 1992.

1989 Arab population: 210,000

1992 total population: 57,848,000

MCC Winter: 6 RJ passenger flights to London, MCC 28,000 mt

2 RJ cargo flights to London, MCC 33,333.3 mt

MCC Summer: 5 RJ passenger flights to London, MCC +14,000 mt

2 RJ cargo flights to London, MCC 33,333.3 mt

Membership: EU, EEA

Fruit (existing market)

The UK is the single largest European importer of Jordanian fruit with a total of 564.1 mt in 1993. Lemons constituted over 90% of exports since 1993. Imports of priority fruit have increased steadily and Jordan's fruit imports has steadily increased as well. In 1993, insignificant amounts of specialty items (cherries and melons) and ethnic items (pomegranates and almonds) entered the market. As an EU market, Jordan will have to target market windows for priority and specialty items. A small Arab community exists in the UK to which Jordan could try to increase exports of ethnic fruit items.

Vegetables (existing market)

The UK is a major agricultural importer in Europe with onion, potato and tomato imports reaching 217,201 mt, 354,907 mt and 250, 486 mt respectively. It is one of Jordan's major European customers, although exports have decreased since 1990. In 1993, Jordan's top three priority vegetable exports were cucumber (143.6 mt), squash (37.3 mt) and cabbage (33 mt). In 1993, ethnic vegetables all fell under the 1 mt mark and included coriander, Jew's mallow, okra, parsley and thyme. The UK is a major consumer of eggplant (priority item) and asparagus (specialty item). There is a large demand also of good quality broccoli and mushroom (specialty items). The small Arab community could also be catered for, along with other communities of similar cultural food tastes.

UNITED STATES

Rating: 9

Economic Indicators

The US has experienced an average real growth rate of 1.1% from 1985 to 1992. The GNP per capita in 1991 was \$22,340 rising slightly to \$23,120 in 1992. The share of agriculture in GDP 1992 was about 2%. To enter this market, Jordan would have to compete with South American suppliers for cost and quality, and will face stringent regulations for fresh produce.

1989 Arab population: 700,000

1992 total population: 255,020,000

MCC Winter: 2 RJ passenger flights to Chicago, MCC 5,333.3 mt

2 RJ cargo flights to New York, MCC 33,333.3 mt

5 RJ passenger flights to New York, MCC 13,333 mt

MCC Summer: 2 RJ passenger flights to Chicago, MCC 5,333.3 mt

2 RJ cargo flights to New York, MCC 33,333.3 mt

5 RJ passenger flights to New York, MCC +10,666.6 mt

Membership: APEC, ATPA, NAFTA

Fruit

The US is one of the largest individual fresh produce market in the world. Its import of priority fruit item generally increased, while date (ethnic fruit) imports remained steady. Imports of bananas (specialty item) reached an impressive 3.7 million mt in 1992. Jordan needs to supply the US during market window with high quality fruit. With Arab communities scattered across the nation, Jordan could begin introducing ethnic fruit produce.

Vegetables

US imports of potatoes and tomatoes, though still large, saw a decrease between 1990 and 1992. Potato imports dropped by 51% to 182,156 and tomato imports dropped by 46% to 196,027 in 1992. Onion imports on the other hand, rose by 11% to 189,309 mt in 1992. The US's volume of imports is high, and Jordan could enter niche markets for seasonal specialty vegetables at a reasonable cost, and target the medium-sized Arab communities with ethnic vegetables that are not consistently available in the market.

3.4 Arab Markets with Strong Potential

BAHRAIN

Rating: 8

Economic Indicators

Bahrain has experienced an average real growth rate of -1.7% from 1985 to 1992. The GNP per capita in 1991 was \$7,150; figures for 1992 are not available. The share of agriculture in GDP 1992 was about 1%.

1992 total population: 533,000

MCC Winter: 2 GF passenger flights to Manama, MCC 4,000 mt

3 RJ passenger flights to Manama, MCC 4,000 mt

1 RJ cargo flight to Manama, MCC n/a

MCC Summer: 2 GF passenger flights to Manama, MCC 4,000 mt

5 RJ passenger flights to Manama, MCC 36,666.6 mt

1 RJ cargo flight to Manama, MCC n/a

Fruit (existing market)

Jordan's main exports to this market consists of priority fruit items, followed by ethnic items and then specialty. It has increased its market shares of priority items, even where the market's total imports held steady. Small quantities of specialty items (0.1 - 10 mt) such as cherries, strawberries and 1,016 mt of melons entered the market. Jordan could concentrate on increasing its exports of existing specialty items.

Vegetables (existing market)

Primarily a Jordanian priority vegetable market. This market's overall imports of Jordanian vegetables increased from a total of 21,368 mt in 1990 to 72,091 mt in 1992. However, Jordan's market share of certain priority vegetables (onions, potatoes, and tomatoes) decreased slightly, while Bahrain's total imports of these items increased. The potential exists for Jordan to increase its market share of both priority and ethnic vegetables.

OMAN

Rating: 8

Economic Indicators

Oman has experienced an average real growth rate of 1% from 1985 to 1992. The GNP per capita in 1991 was \$6,140 rising slightly to \$6,490 in 1992. The share of agriculture in GDP 1992 was about 4%.

1992 total population: 1,637,000

MCC Winter: 4 GF passenger flights to Muscat, MCC 6,000 mt
2 RJ passenger flights to Muscat, MCC 9,333.3 mt

MCC Summer: 4 GF passenger flights to Muscat, MCC 8,000 mt
2 RJ passenger flights to Muscat, MCC 9,333.3 mt

Fruit

Interestingly enough, Jordanian fruit does not appear in this market. According to FAO statistics, imports of priority fruit generally decreased with the exception of pears and apples. In 1992, apple imports reached 30,500 mt. Date imports (ethnic item) increased nearly six fold to 120 mt in 1992. Banana imports (specialty item) decreased from 1,942 mt in 1990 to 400 mt in 1992. Jordan could monitor import patterns and supply this market with priority and ethnic fruit.

Vegetables

FAO statistics show Oman registered a 40% growth for onion imports, 6% for potatoes, and a -23% for tomatoes. With frequent airline flights, relative proximity and similar cultures, Oman presents reasonable opportunity for Jordanian vegetables. Jordan could introduce its priority and ethnic vegetables first, and once familiar with the market, it could begin to supply specialty vegetables if potential is found to exist.

QATAR

Rating: 9

Economic Indicators

Qatar has experienced an average real growth rate of -6.9% from 1985 to 1992. The GNP per capita in 1991 was \$15,040 rising to \$16,240 in 1992. The share of agriculture in GDP 1992 was small.

1992 total population: 453,000

MCC Winter: 1 GF passenger flights to Doha, MCC 2,000 mt
1 Q7 passenger flight to Doha, MCC 4,666.6 mt
3 RJ passenger flights to Doha, MCC 4,000 mt

MCC Summer: 2 GF passenger flights to Doha, MCC 4,000 mt
1 Q7 passenger flight to Doha, MCC 4,666.6 mt
6 RJ passenger flights to Doha, MCC +/- 17,333.3 mt

Fruit (existing market)

Although Qatar is a small market in terms of total volumes of fruit imports, Jordan supplies a significant share of this market with respect to priority items. It accounts for an average of 33% of lemon imports, and 22% of orange imports. Supply of Jordanian melon (specialty item) increased steadily between 1990 and 1993. Figures indicate a small demand for guava and strawberries. Jordan can expand upon exports of ethnic items which is presently limited to small amounts (0.1 - 140 mt) of figs, pomegranates, olives and almonds.

Vegetables (existing market)

Jordanian priority and ethnic vegetable market. Total Jordanian exports to this market averaged 22,136 mt between 1990 and 1993. Jordan's market share of Qatar's onion imports disappeared, while the market's total imports increased about 15%. Market shares for potato imports remained somewhat steady, and tomatoes dropped. Pumpkin was the only Jordanian specialty item in the market with an average import of 12 mt between 1990 and 1993. However, the volume of Jordanian ethnic vegetables dropped during this period. Favorite priority vegetables include tomatoes, cucumbers and capsicums while favorite ethnic items are parsley and fava beans (5 mt and 15 mt respectively in 1993).

SAUDI ARABIA

Rating: 8

Economic Indicators

Saudi Arabia has experienced an average real growth rate of 1.3% from 1985 to 1992. The GNP per capita in 1991 was \$7,900 rising slightly to \$7,940 in 1992. The share of agriculture in GDP 1992 was about 6%.

1992 total population: 15,922,000

MCC Winter: 2 RJ passenger flights to Dhahran, MCC 10,666.6 mt
4 RJ passenger flights to Jeddah, MCC 18,666.6 mt
2 SV passenger flight to Jeddah, MCC +5,333.3 mt
2 RJ passenger flights to Riyadh, MCC 10,666.6 mt
1 SV passenger flights to Riyadh, MCC n/a

MCC Summer: 2 RJ passenger flights to Dhahran, MCC 10,000 mt
4 RJ passenger flights to Jeddah, MCC 20,666.6 mt
2 SV passenger flight to Jeddah, MCC 10,666.6 mt
2 RJ passenger flights to Riyadh, MCC 10,666.6 mt
1 SV passenger flights to Riyadh, MCC 10,666.6 mt

Fruit (existing market)

Saudi Arabia is Jordan's biggest Gulf customer in terms of fruit imports. Although Jordanian imports dropped slightly in 1991 during the Gulf Crisis, it rose from 28,714 mt in 1990 to 34,995 mt in 1993. This market's overall imports of priority fruit remained steady, with some items even experiencing a slight drop. Of the priority products from Jordan, lemons oranges and watermelons were the top three items. Grapefruit (priority item) imports from Jordan increased tenfold from 85 mt in 1990 to 869 mt in 1993. Imports of Jordanian ethnic items (figs, pomegranates, olives, almonds and apricots) were inconsistent alternating with increases and decreases in volumes. Improvements could be made with regard to Jordan's shares of priority items that are exported in small quantities such as apples, grapes, peaches and pomelos. Jordan

could also improve upon existing specialty items (cherries and guavas) and introduce new ones.

Vegetables (existing market)

A Jordanian priority and ethnic vegetables market. Saudi Arabia was one of Jordan's biggest customers until 1992, with total vegetable imports reaching 120,1823 mt. The following year, total Jordanian imports dropped to 1.3 mt, due to strained political relations following the Gulf War. Although Saudi Arabia's total imports of onions, potatoes and tomatoes remained steady, Jordan's market share decreased considerably. Jordan supplied specialty vegetable in 1990 only (20 mt of pumpkin). Pending improved relations with Saudi Arabia, Jordan should concentrate on increasing its market shares of priority vegetables, stabilize ethnic vegetables exports and introduce additional specialty items.

U.A.E.

Rating: 9

Economic Indicators

The U.A.E. has experienced an average real growth rate of 0.0% from 1985 to 1992. The GNP per capita in 1991 was \$22,180 rising slightly to \$22,220 in 1992. The share of agriculture in GDP 1992 was 0%.

1992 total population: 1,670,000

MCC Winter: 2 GF passenger flights to Abu Dhabi, MCC 4,000 mt
5 RJ passenger flights to Abu Dhabi, MCC 10,000 mt
1 PK flight to Abu Dhabi, MCC n/a
1 GF passenger flights to Al-Ain, MCC 2,000 mt
1 RJ passenger flights to Al-Ain, MCC n/a
3 EK passenger flights to Dubai, MCC 15,000 mt
6 RJ passenger flights to Dubai, MCC 14,333.3 mt
1 RJ cargo flight to Dubai, MCC +16,666.6 mt
1 AH passenger flight to Sharjah, MCC n/a

MCC Summer: 4 GF passenger flights to Abu Dhabi, MCC 8,000 mt
7 RJ passenger flights to Abu Dhabi, MCC 26,000 mt
1 RJ cargo flight to Abu Dhabi, MCC 16,666.6 mt
1 TK flight to Abu Dhabi, MCC n/a
2 GF passenger flights to Al-Ain, MCC 4,000 mt
2 RJ passenger flights to Al-Ain, MCC n/a
6 EK passenger flights to Dubai, MCC 21,000 mt
7 RJ passenger flights to Dubai, MCC 33,333.3 mt
1 RJ cargo flight to Dubai, MCC 16,666.6 mt
1 AH passenger flight to Sharjah, MCC n/a

Fruit (existing market)

U.A.E. is Jordan's second largest Gulf customer with Jordanian imports reaching 26,197 mt in 1993. Like Saudi Arabia, U.A.E.'s overall imports of priority fruit items have dropped slightly between 1990 and 1993. Jordan's top three priority items to this market were lemons (an average of 45% of the Emirate's overall imports), oranges (an average of 24% of overall imports) and watermelons which peaked at 1,290 mt in 1993. Major Jordanian specialty item consisted of 402 mt of melons in 1993. Jordanian ethnic items (figs, pomegranates, olives, apricots and almonds) exist in small amounts but fluctuate from year to year. As with Saudi Arabia, Jordan could improve exports of priority and specialty items that exist in small quantities, and introduce new specialty fruit.

Vegetables (existing market)

A Jordanian priority and ethnic vegetable market. This market's import of Jordanian goods fluctuated between 23,485 mt and 99,084 mt during 1990 through 1993. Total imports of onions, potatoes and tomatoes remained steady while Jordan's share dropped. Only one specialty item entered the market in 1990 and 1991, which was 9 mt and 5 mt respectively of pumpkin. Jordan's supply of ethnic vegetables decreased also, although consistent favorites include parsley (195.2 mt), vine leaves (41 mt) and fava beans (150 mt).

CHAPTER 4

AIRLINES AND CARGOES

4.1 Royal Jordanian's Fleet

RJ's fleet in 1994 was comprised of the following:

<u>Model</u>	<u>Quantity</u>
Airbus 310	4
Airbus 320	3
Boeing 707 Freighter	3
Boeing 727	2
Lockheed Tristar 10/15	5

The Airbus 310 aircraft are operated mainly on flights to Europe and the Indian Sub-Continent, while the noisier Airbus 320 and Boeing 727 models cover the Gulf and Middle East routes. This is because most European gateways strictly adhere to noise and safety regulations. Models L15 and A310 dominate operations to North America and the Far East. With regard to Iraq and Kuwait, RJ had hoped that by summer, 1994, it would reinstate the Baghdad and Kuwait operations (to 4 non-stop flights per week and 2 non-stop flights per week respectively) which had been suspended in August 1990 due to the Gulf Crisis and subsequent UN. sanctions. As political matters stand presently, there is no indication of such a resumption taking place.

4.2 Royal Jordanian's 5-Year Plan (1993-97)

The objectives RJ's 5-Year Plan are "to offer world class passenger and cargo services at competitive standards and to sustain efficient and commercially viable operations to produce a net profit, a satisfactory cash flow, and a generally sound financial standing." Other objectives include consolidating traffic on existing routes in order to improve seat/load factors and confine expansion to routes that would contribute significantly to overall revenue performance without requiring additional equipment.

The Planning Department at RJ does not envisage any increase in operating fleet size beyond 1993. However, slightly higher utilization rates are planned with an increase from 9.9 hours per day in 1993 to 10.0 hours per day by 1997. Passenger traffic is predicted to grow during 1993-97 on European routes (5%), Gulf (5.7%), North Africa (14.7%), Middle East (7.8%), Far East (5.9%), Indian Sub-Continent (2.5%), North America (5.2%), and Canada (2.1%).

4.3 Restricting Factors

RJ attributes a lack of real growth to the following factors:

- conflicts between deregulation and protectionist policies,
- slackening economic growth in the region,
- unpredictable traffic restrictions,
- severe seasonal fluctuations of passenger traffic to/from the Gulf States and Saudi Arabia, and
- an absolute directional imbalance of Jordan associated air cargo.

4.4 Destinations

RJ passenger planes currently fly to approximately 40 destinations, covering all the major cities as those serviced by foreign carriers flying out of Jordan. Three 707 cargo planes fly four times weekly to Europe (one flight via London), carrying roughly 35 tons of agricultural produce from Jordan. According to RJ Cargo Director, Mr. Mohammad Hashem Murtada, two additional flights can be scheduled with sufficient notice, if there

is a need for them. Maastricht serves as a hub for RJ cargo planes because of its efficient trucking facilities which allow fresh produce to be transported immediately to their destinations.

New routes are planned for 1995 to Copenhagen, Tokyo and Sydney using either the new 767 model or Airbus 340.

4.5 Cargo Planes

In order to assist Jordanian exporters of agricultural and other products, 3 Boeing 707 hushkitted aircraft were converted to all-cargo aircraft and operate cargo schedule and charter flights. The maximum cargo capacity of the Boeing 707 freighter is 40 mt, although the average used is 36-38 mt due to the curvature of the hold and the company's discretion.

The Boeing 707 tops the scale in terms of noise pollution, followed by the Boeing 727. Both these models, as well as being very uneconomical on fuel, are banned from landing at Western airports due to their stricter adherence to noise pollution regulations. Instead, these models are used on flights destined to Eastern Europe.

The norm when shipping is for Jordan to have agreements with the destination countries to allow RJ planes to set down at their airports. Where agreements do not exist, special permits for cargo shipments on charter flights are required.

4.6 Capacity

Cargoes are placed in pallets, an aluminum tray measuring 125 x 88 inches, with a contoured height of 190 cm and a capacity of 2.5 tons. Priority for space is always given to agricultural produce during the winter season for fruits and vegetables, which runs from mid-November to mid-March.

According to RJ officials, fresh fruits and vegetables are allocated as much as two-thirds of the total cargo capacity. RJ officials pointed out that present regulations prohibit the export of fresh fruits and vegetables on carriers other than RJ. However, exceptions may be applied on a case by case basis: if RJ does not fly to the desired destination, or is unable to provide cargo space or subsidized rates, then agricultural exporters may resort to other carriers. Transit cargo comprises 70% of RJ's cargo space, but this does not have any bearing on agricultural cargo as they are always given priority.

Jordan's total annual horticultural exports have not yet exceeded the available RJ cargo capacities on passenger and cargo planes; this has been the case even during the airline winter season (November to May) when the number of flights serving all destinations decreases slightly and when Jordan's exports are expected to be at the highest. (Please refer to Appendix 3 and 4 for a detailed winter and summer schedule of all airlines departing from Queen Alia International Airport). The following table illustrates the total Jordanian horticultural exports versus the available cargo capacity for each importing country:

Country	1993 Fruit Imports from Jordan (mt)	1993 Vegetable Imports from Jordan (mt)	Winter MCC for Fruit & Vegetables (mt)	Summer MCC for Fruit & Vegetables (mt)
Austria	0.0	39.9	10,333.3	12,999.9
Bahrain	14,910.0	72,091.7	8,000.0 +	40,666.6 +
Belgium	1.6	263.3	2,666.6	9,333.3
Bulgaria	95.9	246.3	0.0	0.0
Canada	0.3	25.7	8,000.0	8,000.0
Czech Republic	0.0	20.0	0.0	0.0
Denmark	1.9	52.4	0.0	0.0
France	1.6	180.7	17,333.3	25,666.6
Germany	11.5	207.5	19,666.6	22,333.3
Hungary	0.0	58.0	0.0	0.0
Indonesia	71.1	0.0	8,000.0	8,000.0
Lebanon	8,048.3	49,881.6	7,999.9	17,666.6
Macedonia	0.0	30.6	0.0	0.0
Netherlands	132.4	4.2	110,666.5	143,999.8
Pakistan	0.1	0.0	9,999.9	9,999.9
Poland	0.0	38.0	0.0	0.0
Qatar	9,304.0	26,219.1	10,666.6	25,999.9 +/-
Romania	342.1	538.3	n/a	2,666.6
Russia	147.1	10.8	2,666.6	7,333.2
Saudi Arabia	34,995.0	1.3	45,333.1	62,666.4
Sweden	7.1	159.6	0.0	0.0
Turkey	0.0	4,068.9	2,666.6+	17,333.2
U.A.E.	26,197.0	93,763.3	61,999.9 +	125,666.5 +
U.K.	564.1	251.8	61,333.3	47,333.3
Ukraine	247.7	44.6	0.0	0.0
Yugoslavia	37.6	91.7	0.0	0.0

Notes to Table

- 1- Figures for total Jordanian imports for fruit and vegetables were obtained from AMO's 1993 Yearly Agricultural Export Statistics.
- 2- Summer cargo capacity is based on RJ's 1994 summer schedule (June to October) and includes foreign carriers.
- 3- Winter cargo capacity is based on RJ's 1993 winter schedule (November to May) and includes foreign carriers.
- 4- n/a - figure not available.
- 5- + indicates figure is a minimum estimate based on available data.
- 6- +/- indicates figure is slightly above or below the given volume.

4.7 Cost

The Jordanian government provides cheap cargo rates for fresh fruits and vegetables at 420 fils/kg to Europe, 460 fils/kg to London. Cost for non-agricultural products is between 550 and 600 fils/kg - this would apply to exports such as flowers.

However, RJ cargo planes carrying agricultural exports to the former Soviet Union (FSU) charge 700 fils/kg since Jordan's high season (November to March) for fresh produce does not coincide with FSU's high season for meat exports (during the summer months) to Jordan. Therefore, the high rates for fresh produce are used to cover the cost of cargo planes returning empty. If the two seasons did coincide, cargo costs for agricultural exports could be reduced to as low as 25 fils/kg, creating great potential for export of fresh fruits and vegetables to the FSU markets during this period.

Privatization of RJ is not expected to have any significant effect, in the short to medium term, on current freighting charges for agricultural produce.

In comparison to RJ, other airlines' cargo cost for fresh fruit and vegetables from Jordan generally rate higher, as demonstrated by the following estimated price samples:

Airline	Destination	Cost (per kilogram)
Egypt Air	Amsterdam	400 fils
Egypt Air	Frankfurt	400 fils
Egypt Air	London	420 fils
Egypt Air	Paris	550 fils
Egypt Air	Zurich	600 fils
Austrian Airline	Amsterdam	560 fils
Austrian Airline	London	580 fils
Austrian Airline	Frankfurt	540 fils

In Egypt and Israel, agricultural exports are subsidized by their governments with EI AI charging 520 fils/kg and Egypt Air 550 fils/kg. Although these prices are higher than Jordan's, Israel produces enough to send 747 cargo planes fully loaded with agricultural products to Europe several times a week.

4.8 IATA

IATA sets the international cargo rates and these rates are used as guidelines by the Jordanian government and its Civil Aviation Department. Ultimately, the prices are subject to the Civil Aviation's approval. However, this seems to be a ceremonial technicality. The government's wish to encourage Jordanian exports to support the economy has a great bearing on the level of the prices which are low in comparison with the other rates in neighboring countries. The Jordanian government currently subsidizes 60% of IATA's charges. RJ has also requested other subsidies from the government and the Ministry of Agriculture to support agriculturists. Before the signing of the Peace Treaty with Israel and Jordan, RJ officials thought it unlikely that RJ will increase these rates in the short to medium term. Since then, economists and other observers hold the opinion that RJ will have to allow competition from foreign carriers in and adjust its rates accordingly.

4.9 Impact of Peace

In the event of the objectives of the Peace Treaty being met, it could become a reality that RJ will fly through Israeli air space but flying time will only be reduced by about 15 minutes, and, as such, no price reduction in air freight is expected. Similarly, should commercial planes be allowed to fly through the air space that converges over Israel, Lebanon and Syria, flying time may be reduced considerably by 45 minutes to one and a half hours. While this may save fuel costs for RJ, each country charges a fee for use of its air space, and therefore air freight costs will not be reduced.

A favorable political climate is expected to attract foreign carriers to the region. The question that poses itself is whether foreign carriers will choose to land in Israel, if they do not do so already, because of lower airport tariffs and higher passenger traffic that would make landing there more profitable. Should they land in Jordan, availability of cargo space and destination will increase, provided Jordanian regulations allow exporters to utilize this cargo space on non-RJ carriers.

4.10 Detailed Schedules

Detailed airline schedules of relevant destinations exist in Appendix 3 for the Winter Schedule and in Appendix 4 for the Summer Schedule. As much useful information as was available has been incorporated into these schedules. The type of aircraft given on a particular flight is subject to change upon fairly short notice and in which case the available cargo space may also be altered. Where certain information is not known or is not available, this is indicated by the abbreviation "n/a." A list of notes to the schedules appears at the end of each of the appendices 3 and 4.

CHAPTER 5

STRATEGY AND RECOMMENDATIONS

The purpose of this airline export strategy study was to produce an indicative guide to potential international markets for Jordan's fresh fruit and vegetable produce along with cargo space availability on Royal Jordanian airlines and foreign airline carriers. It is by no means a definitive guide to market opportunities, but rather a guide to the economic capacities and horticultural demands of the identified markets. The criteria for this study have been placed in the context of medium-term supply and demand - the period of six months to one and a half years from completion of this study. Therefore, the focus of this study are markets which are consuming what Jordan is producing. This section focuses on the markets that have been identified as having strong potentials for the Jordanian exporter. Markets with marginal potential are briefly discussed and exporters should consider them as alternative markets with growing potential.

5.1 Strong Potential Markets

Four of the higher rating countries (scoring 9 points) are already markets for Jordan's fresh fruit and vegetable produce: France, Germany, Qatar, U.A.E., and the UK. The agricultural share of the 1992 GDP of these countries was small ranging between 1-3%. Their stable economies allow for relatively sound medium-term predictions. Another factor to consider is the presence of small Arab communities in Germany and the UK, and the large Arab community that exists in France.

Italy and the US also rated highest (9 points) and hold strong potentials for Jordan as export destinations. The US is a more stable economy than Italy; nevertheless, the share of agriculture in both countries' GDP 1992 was low at 2% and 3% respectively. They both have significant Arab communities which exporters must consider: small in Italy and medium-sized in the US. The US (as a member of APEC, ATPA, NAFTA) and Italy (as a member of EU, EEA) have stringent import requirements and regulations to which Jordanian exporters must adhere if they are to experience successes.

Countries scoring 9 points are serviced by regular RJ and foreign airline flights with the exception of Germany, the UK and the US to which only RJ flies. The frequency of flights indicate that there is no shortage of cargo space and, as yet, exporters have not exceeded the cargo space available.

The countries scoring 8 points are Bahrain, Canada, Japan, the Netherlands, Oman, the Russian Federation, Saudi Arabia, Spain, and Turkey. Of these Canada, Japan, the Netherlands, Oman, Saudi Arabia and Spain have stable economies with agriculture contributing between 2% and 6% of the 1992 GDP. Both Canada and Spain have small Arab communities that are worth considering as potential consumers of Jordan's ethnic fruit and vegetable items. On the priority and specialty items front, exporters must take into account that Spain is a major fresh produce supplier to the EU and is actually Jordan's competitor.

Saudi Arabia is traditionally Jordan's biggest Gulf customer and, with improving relations as predicted in the business world, it looks to remain a market with strong potential. Although Bahrain has experienced an average real growth rate of -1.7% (1985-92), its agricultural sector is very small, contributing only 1% to the country's 1992 GDP. This is a positive indicator that there is a high demand for horticultural produce.

In the case of the Russian Federation, the rating criteria give it a high score of 8 points. However, when approaching this market, exporters must be aware that the country is experiencing problems in adjusting to a market economy. Progress in the privatization of farms has been very successful, and very recently there has been a shift from livestock farming to crop farming. These factors, with time, may prove to have negative repercussions for Jordanian fresh fruit and vegetable exports.

When considering Turkey as an export destination, exporters must look at the overall state of the Turkish economy as well as the share of agriculture in GDP 1992 which stood at a high 18%. Turkey's robust and outward-oriented economy with a dynamic private sector are factors that, for the purposes of trade, balance a high unemployment rate and a rapidly growing population. Its medium-sized Arab community is also a plus point.

All these countries (excepting Japan and Canada) are serviced by regular RJ and international airline flights with ample cargo space for fresh fruit and vegetable produce. Where exporters need to lobby for more regular cargo space are for the following destinations:

Canada: presently only RJ services this destination
Japan: presently no airline services Tokyo
Russia: only one flight per week by RJ and SU service Moscow, increased frequency is required

In the cases of Saudi Arabia and Turkey, exporters must address the possibility of cheaper transportation being available in the form of refrigerated trucks rather than planes due to their close proximity. However, in the case of certain items, it may become feasible to use air freight than land.

A further consideration with regard to markets that are non-existing but have strong potentials, is that exporters would do well to enlist the assistance of the government of Jordan as well as exporters' associations such as JEAFFV when approaching these countries. The role of the government and the associations would be that of mediators in establishing trade relations.

High quality produce is fundamental to any effective marketing strategy, particularly when aimed at countries with strong trade arrangements with neighboring countries and/or regions.

5.2 Marginal Potential Markets

The generalization that these are smaller markets which are becoming healthy is reasonable. A great deal more field research is required for these markets in order to be better armed when making an export decision. The need for this extra field work on behalf of the exporter is the result of the paucity of local information regarding international market demands. Exporters are advised to approach these markets with caution.

Malaysia has been a target of successful Jordanian field research and activity, and an example of the role of JEAFFV in establishing good trade relations. Exporters must make optimum use of such opportunities, and develop tried and tested marketing techniques backed by high quality and consistent supplies of fresh fruit and vegetables as a result of good pre- and post-harvesting methods.

The fostering of better relations with RJ - a fundamental link in the airline exporter's chain - will improve the chances of a lobby with parliamentary support and an exporters' bloc for a positive change in RJ. JEA and its members need an identity that

can be created by media activity and pronounced by visible successes in marketing strategies and export increases. This is particularly crucial in the light of the fact that agriculture has always been a neglected and declining sector in the Jordanian economy. JEAFFV's role is to educate exporters by providing information in the form of publications and seminars about government and international terms of trade policies and changes, RJ's regulations (such as the need for prior scheduling with RJ), aircraft capacities, tariffs and handling charges, exporting procedures in Jordan and import procedures abroad.

The lobbying for changes in RJ cargo space availability and destinations serviced is an important element to helping exporters increase their exports, which in turn would help boost the Jordanian economy. The countries that RJ does not presently service include Australia, the Czech Republic, Denmark, Finland, Hong Kong, Hungary, Iran, Ireland, Japan, (South) Korea, Norway, Poland and Sweden.

In order to take advantage of market opportunities in these (mostly marginal) potential markets, exporters need to negotiate suitable and practical additional flight routes, additional transits on existing flights, or special charter cargo plane flights with RJ and, if necessary, international airlines. RJ services the following destinations: Belgium, Canada, France, Germany, Indonesia, Malaysia, Singapore, Spain, Switzerland, Thailand, the UK and the US. Romania is an exception, presently there existed one flight per week to Bucharest but there are no RJ flights servicing this destination at all. Limited RJ and international airlines service the Russian Federation and Pakistan. In both these cases, should there appear an increased demand for Jordanian fresh fruit and vegetables, exporters must also negotiate with RJ and others for increased cargo space availability and/or flexibility in re-routing existing flights. Finally, the combination of airline flights and trucking should be seriously considered for expansion as a means of transport to European countries. It is already being used as is shown by the regular shipments by 4 flights in the summer and 2 flights in the winter to Maastricht and then on to further destinations by truck.

APPENDIX 1

Membership and Nature of Selected Regional Trade Arrangements in Europe, and Asia and Oceania (Reproduced in part from Commodity Review and Outlook, 1993-94)

Europe

- CEFTA** Central European Free Trade Area
Members (4): Czech Republic, Hungary, Poland, Slovak Republic
Nature of Arrangement: Free trade area
- EU** The European Union
Members (12): Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, United Kingdom
Nature of Arrangement: Regional integration including a Common Agricultural Policy and widened integration of members' policies in the European Union
- EEA** European Free Trade Association
Members (17): EU countries plus EFTA countries excluding Switzerland and Liechtenstein
Nature of Arrangement: Free trade area
- EFTA** European Free Trade Association
Members (7): Austria*, Finland*, Iceland, Liechtenstein, Norway*, Sweden*, Switzerland
Nature of Arrangement: Free trade area

* Country will become EU and therefore EEA member in January 1995.

Asia and Oceania

- APEC** Asia-Pacific Economic Co-operation
Members (17): ASEAN countries (6) plus Australia, Canada, China, China Province of Taiwan, Hong Kong, Japan, Republic of Korea, Mexico, New Zealand, Papua New Guinea, United States
Nature of Arrangement: Broad co-operation
- ASEAN** Association of South East Asian Nations
Members (6): Brunei Darrussalam, Indonesia, Malaysia, Philippines, Singapore, Thailand
Nature of Arrangement: Free trade area (AFTA)
- SAARC** South Asian Association for Regional Co-operation
Members (7): Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka
Nature of Arrangement: Preferential trade area (SAPTA)
- ECO** Economic Co-operation Organization
Members (10): Afghanistan, Azerbaijan, Islamic Republic of Iran, Kazakhstan, Kirghistan, Pakistan, Tajikistan, Turkey, Uzbekistan
Nature of Arrangement: Free trade area

APPENDIX 2

EU Customs Tariff

The following tariff schedule was extracted from a study entitled "Jordan's Comparative Advantage in EEC Horticultural Product Markets" prepared by Sigma One Corporation, 1991:

EU Common Customs Tariff Applied to Imports of Select Products from Spain & Jordan		
Product	Rate (%)	Applicable Dates
Asparagus	8.7	All Year
Eggplant	5.6	May - Sep
Green Beans	7.0	1 Jan - 30 Jun
Green Beans	9.0	1 July - 30 Sep
Green Beans	7.0	1 Oct - 31 Dec
Peppers	3.4	All Year
Table Grapes	5.4	1 Jan - 31 Mar
Table Grapes	10.8	1 Apr - 14 Jul
Table Grapes	13.2	15 Jul - 31 Oct
Table Grapes	10.8	1 Nov - 31 Dec
Melons	5.9	All Year
Strawberries	7.6	1 Jan - 30 Apr
Strawberries	8.7	1 May - 31 Jul
Strawberries	7.6	1 Aug - 31 Dec
Tomatoes	3.8	1 Mar - 14 May
Tomatoes	6.3	15 May - 31 Oct
Tomatoes	3.8	1 Nov - 31 Dec

APPENDIX 3

Winter Schedule (November to May) of all airlines from QAIA
 (Notes at end of chart)

AUSTRIA, Vienna

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
OS	00730	MD82	4000	20	01/11/93	31/05/94	26	1345	1705
RJ	00121	320	3000	30	01/11/93	31/05/94	25	1100	1410
RJ	00127	320	1500	10	01/11/93	31/05/94	7	1050	1400

BAHRAIN, Manama

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF	00972	320	3000	30	01/11/93	31/05/94	15	1330	1645
RJ	00606	727	2000	15	01/11/93	31/05/94	16	2015	2335
RJ	00606	727	2000	15	01/11/93	31/05/94	4	2045	0005
RJ*	00028	70F	n/a	n/a	01/11/93	31/05/94	5	0400	0730

BELGIUM, Brussels

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0	00103	L15	2000	20	01/11/93	31/05/94	26	1135	1745

CANADA, Montreal

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0ams	00265	L15	3000	15	01/11/93	31/05/94	24	1115	1720

CANADA, Toronto

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ00mon	00265	L15	3000	15	01/11/93	31/05/94	24	1115	1935

FRANCE, Paris (Orly)

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00115	310	7000	30	01/11/93	31/05/94	4	1150	1615
RJ	00103	L15	2000	20	01/11/93	31/05/94	26	1135	1600

FRANCE, Paris (Charles de Gaulle)

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AF0	08173	310	7500	30	01/11/93	31/05/94	2	0545	1155
AF0	08173	310	7500	30	01/11/93	31/05/94	5	0545	1155

GERMANY, Berlin

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00117	310	7000	30	01/11/93	31/05/94	35	1030	1410

GERMANY, Frankfurt

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0	00121	320	3000	30	01/11/93	31/05/94	25	1100	1615
RJ	00123	320	1500	10	01/11/93	31/05/94	1	1215	1615
RJ	00125	L15	8000	40	01/11/93	31/05/94	7	0835	1215

GREECE, Athens

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00131	727	1500	10	01/11/93	31/05/94	47	1200	1445

INDIA, Bombay

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*0	00028	70F	25000	160	01/11/93	31/05/94	5	0400	1500

INDIA, Calcutta

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*0	00022	70F	25000	160	01/11/93	31/05/94	2	0400	1900
RJ	00184	L15	6000	30	01/11/93	31/05/94	3	2130	0705

INDIA, Delhi

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00192	310	7000	30	01/11/93	31/05/94	35	2020	0515
RJ	00192	310	7000	30	01/11/93	31/05/94	7	2125	0620

INDONESIA, Jakarta

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0kua	00186	L15	6000	30	01/11/93	31/05/94	4	2205	1450
RJ0sin	00188	L15	6000	30	01/11/93	31/05/94	7	2205	1450

ITALY, Rome

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AZ	00719	MD80	7000/4000	30	01/11/93	31/05/94	35	1145	1520
AZ0	00741	MD80	7000	30	01/11/93	31/05/94	2	1015	1520
AZ	00761	MD80	7000	30	01/11/93	31/05/94	7	0710	1045
RJ	00101	727	n/a	n/a	01/11/93	31/05/94	3	0930	1245
RJ	00101	310	8000	40	01/11/93	31/05/94	47	1100	1415

LEBANON, Beirut

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
ME	00313	310	n/a	n/a	01/11/93	31/05/94	14	0815	0935
ME	00313	707	4000	30	01/11/93	31/05/94	5	0815	0935
ME	00313	310	n/a	n/a	01/11/93	31/05/94	36	0745	0905
ME	00313	707	4000	30	01/11/93	31/05/94	7	0745	0905
RJ	00401	320	1000	10	01/11/93	31/05/94	1467	0600	0730

MALAYSIA, Kuala Lumpur

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00182	L15	6000	30	01/11/93	31/05/94	2	2200	1250
RJ	00186	L15	6000	30	01/11/93	31/05/94	4	2205	1250

In 1992, RJ had planned an increase from 2 weekly services to 3 in 1994.

NETHERLANDS, Amsterdam

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
KL	00513	310	7000	30	01/11/93	31/05/94	2	0220	0640
KL	00515	310	7000	30	01/11/93	31/05/94	47	0020	0625
KL	00517	310	7000	30	01/11/93	31/05/94	15	0220	0640
KL	00519	310	7000	30	01/11/93	31/05/94	36	0020	0635
RJ*	00091	70F	25000	160	01/11/93	31/05/94	3	0900	1300
RJ*	00091	70F	25000	160	01/11/93	31/05/94	6	0815	1215
RJ	00261	L15	2000	10	01/11/93	31/05/94	2	0830	1230
RJ	00261	L15	n/a	n/a	01/11/93	31/05/94	3	1015	1415
RJ	00261	L15	2000	10	01/11/93	31/05/94	567	1130	1530
RJ	00263	L15	4000	20	01/11/93	31/05/94	14	1100	1500

NETHERLANDS, Maastricht

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*0	00051	70F	25000	n/a	01/11/93	31/05/94	1	1130	1855
RJ*	09051	70F	26000	160	01/11/93	31/05/94	3	0900	1300

OMAN, Muscat

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF00	01972	320	3000	30	01/11/93	31/05/94	1	1330	2125
GF00	04972	320	3000	30	01/11/93	31/05/94	3	1330	2045
GF0	05972	320	3000	30	01/11/93	31/05/94	7	1330	2010
RJ0dub	00600	310	7000	30	01/11/93	31/05/94	4	2130	0355
RJ0dub	00604	310	7000	30	01/11/93	31/05/94	1	2130	0400

PAKISTAN, Karachi

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
PK0	00764	310	7000	30	01/11/93	31/05/94	3	1545	0030
RJ0dub	00190	L15	8000	40	01/11/93	31/05/94	5	2030	0500
RJ0dub	00196	310	n/a	n/a	01/11/93	31/05/94	1	2030	0500

QATAR, Doha

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF	07972	320	3000	30	01/11/93	31/05/94	7	1330	1655
Q7	00602	310	7000	30	01/11/93	31/05/94	5	1600	2000
RJ0man	00606	727	2000	15	01/11/93	31/05/94	146	1945	0045

ROMANIA, Bucharest

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RO	00182	B15	n/a	n/a	01/11/93	31/05/94	3	0155	0510

RUSSIAN FEDERATION, Moscow

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ					planned 1995	planned 1995	35		
SU	00506	TU154	4000	25	01/11/93	31/05/94	7	1605	2110

Two RJ passenger flights are planned for 1995 (days 3 and 5) to replace this one flight.

SAUDI ARABIA, Dhahran

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00704	310	8000	40	01/11/93	31/05/94	15	2000	2320

SAUDI ARABIA, Jeddah

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00700	310	7000	30	01/11/93	31/05/94	2467	2030	2330
SV	00660	737	n/a	n/a	01/11/93	31/05/94	3	1130	1430
SV	00666	L15	8000	40	01/11/93	31/05/94	5	1200	1500

SAUDI ARABIA, Riyadh

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00702	320	8000	40	01/11/93	31/05/94	37	2000	2330
SV	00666	737	n/a	n/a	01/11/93	31/05/94	4	1400	1655

SINGAPORE, Singapore

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0kua	00182	L15	6000	30	01/11/93	31/05/94	2	2200	1445
RJ	00188	L15	6000	30	01/11/93	31/05/94	7	2205	1325

In 1992, RJ had planned an increase from 2 weekly services to 3 in 1994.

SPAIN, Madrid

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0	00105	310	7000	30	01/11/93	31/05/94	26	1145	1825

SRI LANKA, Colombo

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJUL	00194	310	7000	30	01/11/93	31/05/94	35	1930	0525

SWITZERLAND, Geneva

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00105	310	7000	30	01/11/93	31/05/94	26	1145	1545

THAILAND, Bangkok

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00180	L15	6000	30	01/11/93	31/05/94	57	2230	1130
RJocal	00184	L15	6000	30	01/11/93	31/05/94	3	2130	1145

TURKEY, Istanbul

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJank	00161	727	2000	15	01/11/93	31/05/94	5	1105	1500
RJ	00165	727	2000	15	01/11/93	31/05/94	3	1100	1330
TK	00803	737	n/a	n/a	01/11/93	31/05/94	15	0600	0845

UNITED ARAB EMIRATES (UAE), Abu Dhabi

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF0	01972	320	3000	30	01/11/93	31/05/94	1	1330	1945
GF	03972	320	3000	30	01/11/93	31/05/94	3	1330	1810
RJ	00602	320	2000	15	01/11/93	31/05/94	267	2130	0215
RJ	00604	320	2000	15	01/11/93	31/05/94	1	2130	0215
RJ	00614	727	7000	30	01/11/93	31/05/94	4	1105	1550
PK	00764	310	n/a	n/a	01/11/93	31/05/94	3	1545	2035

UAE, Al-Ain

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF0	02972	320	3000	30	01/11/93	31/05/94	3	1330	1920
RJ0	00614	320	n/a	n/a	01/11/93	31/05/94	4	1040	1655

UAE, Dubai

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
EK	00921	310	7500	30	01/11/93	31/05/94	4	1715	0015
EK	00923	310	7500	30	01/11/93	31/05/94	16	1915	0015
RJ*	00080	70F	25000	160	01/11/93	31/05/94	7	2000	0100
RJ	00190	L15	8000	40	01/11/93	31/05/94	5	2030	0115
RJ	00196	310	7000	40	01/11/93	31/05/94	1	2030	0115
RJ	00600	310	7000	30	01/11/93	31/05/94	4	2130	0215
RJ0abu	00602	320	n/a	n/a	01/11/93	31/05/94	267	2130	0340

UAE, Sharjah

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AH	04064	727	na	n/a	01/11/93	31/05/94	3	1520	1950

UNITED STATES OF AMERICA (USA), Chicago

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0ams	00263	L15	4000	20	01/11/93	31/05/94	14	1100	1755

USA, New York

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*0ams	00091	70F	25000	160	01/11/93	31/05/94	3	0900	1630
RJ*0ams	00091	70F	25000	160	01/11/93	31/05/94	6	0815	1545
RJ0ams	00261	L15	4000	20	01/11/93	31/05/94	2	0830	1540
RJ0ams	00261	L15	4000	20	01/11/93	31/05/94	3	1015	1725
RJ0ams	00261	L15	4000	20	01/11/93	31/05/94	567	1130	1840

RJ plans to increase NYC frequency up to 6 weekly (passenger) flights starting 1995 onwards.

UNITED KINGDOM, London

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*	00051	70F	25000	160	01/11/93	31/05/94	1	1130	1500
RJ*0	00051	70F	25000	160	01/11/93	31/05/94	3	0900	1445
RJMH	00111	310	7000	30	01/11/93	31/05/94	1246	1205	1545
RJ0bru	00117	310	7000	30	01/11/93	31/05/94	35	1030	1545

Notes to the Schedule

AF	Air France	*	Boeing 707 (Freighter)
AH	Air Algier	◊	1 stop (stop not known)
AZ	Alitalia	◊◊	2 stops (stops not known)
GF	Gulf Air	◊abu	stop in Abu Dhabi
KL	KLM, Dutch	◊ams	stop in Amsterdam
ME	Middle East Airlines	◊ank	stop in Ankara
OS	Austrian Airlines	◊bru	stop in Brussels
PK	Pakistan International Airline	◊cal	stop in Calcutta
Q7	Qatar Airlines	◊doh	stop in Doha
RJ	Royal Jordanian	◊dub	stop in Dubai
RO	Tarom Romanian Airline	◊hud	stop in Hdayda
SU	Aeroflot	◊kua	stop in Kuala Lumpur
SV	Saudia	◊man	stop in Manama
TK	Turkish Airlines	◊sin	stop in Singapore
UL	Air Lanka	◊◊mon	stop in Amsterdam & Montreal

Days

1	Monday
2	Tuesday
3	Wednesday
4	Thursday
5	Friday
6	Saturday
7	Sunday

Unit of measurement for volume (of cargo capacity) is metric tons.

APPENDIX 4

Summer Schedule (June to October) of all airlines from QAIA (Notes at end of charts)

AUSTRIA, Vienna

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
OS	00730	MD82	4000	20	27/03/94	29/10/94	26	1350	1710
RJ	00121	320	3000	30	01/06/94	31/10/94	2	1200	1510
RJ	00121	310	7000	30	01/06/94	31/10/94	5	1200	1510
RJ	00127	320	1500	10	01/06/94	31/10/94	7	1200	1500

BAHRAIN, Manama

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF	01972	320	3000	30	27/08/94	29/10/94	1	1430	1500
GF	05972	320	3000	30	27/08/94	29/10/94	5	1430	1500
RJ	00606	310	7000	30	01/06/94	31/10/94	1	2045	2315
RJ	00606	L15	8000	40	01/06/94	31/10/94	2	2145	2315
RJ	00606	727	2000	15	01/06/94	31/10/94	46	2045	2315
RJ	06064	310	7000	30	01/06/94	31/10/94	4	2045	0015
RJ*	00028	70F	n/a	n/a	01/06/94	31/10/94	5	0500	0730

BELGIUM, Brussels

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0	00103	310	7000	30	01/06/94	31/10/94	26	1255	1845

CANADA, Montreal

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0ams	00265	L15	3000	15	01/06/94	31/10/94	24	1215	1820

CANADA, Toronto

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ00mon	00265	L15	3000	15	01/06/94	31/10/94	24	1215	2035

FRANCE, Paris (Orly)

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00115	310	7000	30	01/06/94	31/10/94	24	1235	1700
RJ	00115	L15/320	2000	20	01/06/94	31/10/94	6	1235	1700

FRANCE, Paris (Charles de Gaulle)

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AF0	08167	310	7500	30	27/03/94	29/10/94	3	0545	1200
AF0	08173	310	7500	30	27/03/94	29/10/94	4	0555	1200
AF0	08173	310	7500	30	27/03/94	29/10/94	6	2355	0600

GERMANY, Berlin

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00117	310	7000	30	01/06/94	31/10/94	3	1135	1210
RJ	00117	310	7000	30	01/06/94	31/10/94	5	1135	1510

GERMANY, Frankfurt

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0	00121	320	3000	30	01/06/94	31/10/94	2	1200	1715
RJ0	00121	310	7000	30	01/06/94	31/10/94	5	1200	1715
RJ	00123	320	1500	10	01/06/94	31/10/94	1	1325	1715
RJ	00125	L15	8000	40	01/06/94	31/10/94	7	0945	1315

GREECE, Athens

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00131	727	1500	10	01/06/94	31/10/94	47	1300	1545

INDIA, Bombay

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*00	00022	70F	25000	160	16/08/94	31/10/94	2	0315	2000
RJ*0	00028	70F	25000	160	01/06/94	31/10/94	5	0500/0600	1500/2000
RJ*	09022	70F	25000	160	01/06/94	31/10/94	6	0530	1400

INDIA, Calcutta

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*0	00022	70F	25000	160	16/08/94	31/10/94	2	0315	1550
RJ*	00028	70F	25000	160	01/06/94	31/10/94	5	0600	1530

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00184	L15	6000	30	01/06/94	31/10/94	3	2200	0700
INDIA, Delhi									
RJ	00192	310	7000	30	01/06/94	31/10/94	35	2110	0515
RJ	00192	310	7000	30	01/06/94	31/10/94	7	2225	0630

INDONESIA, Jakarta

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0kua	00186	L15	6000	30	01/06/94	31/10/94	4	2245	1450
RJ0sin	00188	L15	6000	30	01/06/94	31/10/94	7	2245	1450

ITALY, Rome

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AZ	00719	MD80	7000/4000	30	27/03/94	29/10/94	35	1110	1535
AZ0	00741	MD80	7000	30	04/04/94	29/10/94	2	0940	1540
AZ	00761	MD80	7000	30	04/04/94	29/10/94	7	0620	1045
RJ	00101	320	1500	10	01/06/94	31/10/94	3	1030	1345
RJ	00101	320	1500	10	01/06/94	31/10/94	4	1200	1515
RJ	00101	310/L15	8000	40	01/06/94	31/10/94	7	1200	1515

ITALY, Milan

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00151	320	3000	20	26/07/94	31/10/94	1	1145	1545

LEBANON, Beirut

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AF	08167	310	7500	30	27/03/94	29/10/94	3	0545	0710
ME	00313	707	4000	30	27/03/94	29/10/94	13456	0915	1035
RJ	00401	320	1000	10	01/06/94	31/10/94	147	0645	0810
RJ	00401	727	1000	10	01/06/94	31/10/94	6	0645	0810
RJ	00403	320	1000	10	01/06/94	31/10/94	3	2035	2200
RJ	00403	310	4000	20	01/06/94	31/10/94	5	2035	2200

MALAYSIA, Kuala Lumpur

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00182	L15	6000	30	01/06/94	31/10/94	2	2250	1250
RJ	00186	L15	6000	30	01/06/94	31/10/94	4	2245	1250

In 1992, RJ had planned an increase from 2 weekly services to 3 in 1994.

NETHERLANDS, Amsterdam

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
KL	00513	310	7000	30	04/04/94	29/10/94	2	0230	0640
KL	00515	310	7000	30	04/04/94	29/10/94	47	0025	0640
KL	00517	310	7000	30	04/04/94	29/10/94	15	0225	0635
KL	00519	310	7000	30	04/04/94	29/10/94	36	0030	0635
RJ*	00091	70F	25000	160	01/06/94	31/10/94	3/4	1000	1400/1415
RJ*	00091	70F	25000	160	01/06/94	31/10/94	6	0915	1300/1330
RJ	00261	L15	n/a	n/a	01/06/94	31/10/94	25	0930	1330
RJ	00261	L15	n/a	n/a	01/06/94	31/10/94	3	1115	1515
RJ	00261	L15	2000	10	01/06/94	31/10/94	67	1230	1630
RJ	00263	L15	4000	20	01/06/94	31/10/94	14	1220	1620

NETHERLANDS, Maastricht

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*	00035	70F	25000	160	01/06/94	31/10/94	7	1000	1400
RJ*	00037	70F	25000	160	01/06/94	31/10/94	1	1200	1600
RJ*0	00051	70F	25000	n/a	28/08/94	31/10/94	1	0700	1430
RJ*	09051	70F	26000	160	28/08/94	31/10/94	3	1100	1500

OMAN, Muscat

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF00	01972	320	3000	30	27/08/94	29/10/94	1	1430	1700
GF00	04972	320	3000	30	27/08/94	29/10/94	4	1430	1700
GF0	05972	320	3000	30	27/08/94	29/10/94	5	1430	1600
GF0	07972	320	3000	30	27/08/94	29/10/94	7	1430	1600
RJ0dub	00600	310	7000	30	01/06/94	31/10/94	14	2230	0415

PAKISTAN, Karachi

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
PK0	00764	310	7000	30	01/06/94	31/10/94	3	1455	2350
RJ0dub	00190	L15	8000	40	01/06/94	31/10/94	5	2130	0500

QATAR, Doha

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GF	04972	320	3000	30	27/08/94	29/10/94	4	1430	1500
GF	07972	320	3000	30	27/08/94	29/10/94	7	1430	1500
Q7	00602	310	7000	30	01/06/94	31/10/94	5	1300	1500
RJoman	00606	727/310/L-15	2000/7000/8000	15/30/40	01/06/94	31/10/94	1246	2045/L15=2145	0045
RJ	00608	727	n/a	n/a	01/06/94	31/10/94	5	2300	0130
RJ	09606	310	7000	30	01/06/94	31/10/94	4	2100	0030

ROMANIA, Bucharest

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RO	00182	B111	4000	25	27/03/94	29/10/94	3	0105	0405

RUSSIAN FEDERATION, Moscow

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00177	310	7000	30	13/06/94	31/10/94	1	1435	1905
SU	00506	TU154	4000	25	27/03/94	29/10/94	7	1605	2110

Two RJ passenger flights are planned for 1995 (days 3 and 5) to replace this one flight.

SAUDI ARABIA, Dhahran

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00704	310/L15	8000	40	01/06/94	31/10/94	1	2100	2325
RJ	00704	L15	7000	30	01/06/94	31/10/94	5	2100	2325

SAUDI ARABIA, Jeddah

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00700	L15	8000	40	01/06/94	31/10/94	246	2130	2330
RJ	00700	310	7000	30	01/06/94	31/10/94	7	2130	2330
SV	00660	L15	8000	40	27/03/94	29/10/94	35	1200	1500

SAUDI ARABIA, Riyadh

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00702	310/L15	8000	40	01/06/94	31/10/94	3	2105	2315
RJ	00702	320/L15	8000	40	01/06/94	31/10/94	7	2105	2315
SV	00666	L15	8000	40	27/03/94	29/10/94	24	1430	1730

SINGAPORE, Singapore

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0kua	00182	L15	6000	30	01/06/94	31/10/94	2	2250	1440
RJ	00188	L15	6000	30	01/06/94	31/10/94	7	2245	1325

In 1992, RJ had planned an increase from 2 weekly services to 3 in 1994.

SPAIN, Madrid

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00105	310	7000	30	01/06/94	31/10/94	26	1430	1915
RJ	00107	310	7000	30	21/07/94	30/09/94	4	2045	0130

SRI LANKA, Colombo

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00194	310	7000	30	01/06/94	31/10/94	35	2030	0540

SWITZERLAND, Geneva

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00103	310	7000	30	01/06/94	31/10/94	26	1255	1655

THAILAND, Bangkok

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ	00180	L15	6000	30	01/06/94	31/10/94	57	2300	1130
RJ0cal	00184	L15	6000	30	01/06/94	31/10/94	3	2200	1140

TURKEY, Istanbul

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ0ank	00161	727/320	2000	15	01/06/94	31/10/94	5	1210	1600
RJ	00165	727/320	2000	15	01/07/94	30/09/94	36	1240	1500
RJ	00165	320/727	2000	15	01/07/94	30/09/94	7	1240	1500
RJ	00165	727	2000	15	01/10/94	31/10/94	3	1240	1500
TK	00803	DC-9	4000	25	27/03/94	29/10/94	15	0600	0845

UNITED ARAB EMIRATES (UAE), Abu Dhabi

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GFØ	01972	320	3000	30	27/08/94	29/10/94	1	1430	1600
GF	02972	320	3000	30	27/08/94	24/09/94	2	1430	1500
GF	03972	320	3000	30	27/08/94	29/10/94	3	1430	1500
GF	06972	320	3000	30	27/08/94	24/09/94	6	1430	1500
RJ	00602	310	7000	30	01/06/94	31/10/94	2367	2230	0225
RJØdoh	00604	320	2000	15	01/06/94	31/10/94	1	2230	0405
RJØdoh	00608	727	2000	15	01/06/94	31/10/94	5	2300	0415
RJ	00614	727/310	7000	30	01/06/94	31/10/94	4	1145	1530
RJ*DXB	00080	70F	25000	160	01/06/94	31/10/94	7	2100	0100
TK	00805	DC-9	n/a	n/a	18/06/94	28/08/94	7	0525	0710

UAE, Al-Ain

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
GFØ	02972	320	3000	30	27/08/94	24/09/94	2	1430	1600
GFØ	04972	320	3000	30	27/08/94	29/10/94	4	1430	1600
RJ	00604	320	n/a	n/a	01/06/94	31/10/94	1	2230	0230
RJØ	00614	727/310	n/a	n/a	01/06/94	31/10/94	4	1145	1655

UAE, Dubai

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
EK	00904	727	3000	30	01/06/94	31/10/94	134	2230	0230
EK	00921	310	7500	30	27/03/94	29/10/94	4	1745	0045
EK	00923	310	7500	30	27/03/94	29/10/94	16	1945	0045
RJ*	00080	70F	25000	160	01/06/94	31/10/94	7	2100	0100
RJ	00190	L15	8000	40	01/06/94	31/10/94	5	2130	0115
RJ	00600	310	7000	30	01/06/94	31/10/94	14	2230	0230
RJØabu	00602	310	7000	30	01/06/94	31/10/94	2367	2230	0350

UAE, Sharjah

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
AH	04064	C130	7000	30	05/04/94	29/10/94	3	1620	2050

UNITED STATES OF AMERICA (USA), Chicago

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJØams	00263	L15	4000	20	01/06/94	31/10/94	14	1220	1915

USA, New York

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*0ams	00091	70F	25000	160	01/06/94	31/10/94	4	1000	1730
RJ*0ams	00091	70F	25000	160	01/06/94	31/10/94	6	0915	1655
RJ0ams	00261	L15	4000/2000	20/10	01/06/94	31/10/94	25	0930	1630
RJ0ams	00261	L15	4000	20	01/06/94	31/10/94	3	1115	1815
RJ0ams	00261	310/L15	2000/4000	10/20	01/06/94	31/10/94	67	1230	1930

RJ plans to increase NYC frequency up to 6 weekly (passenger) flights starting 1995 onwards.

UNITED KINGDOM, London

AIRLINE	FLIGHT	AIRCRAFT	CAPACITY	VOLUME	START	END	DAYS	DEPT	ARRIVAL
RJ*	00051	70F	25000	160	28/08/94	31/10/94	1	0700	1030
RJ*	00051	70F	25000	160	01/06/94	31/10/94	3	1000	1545
RJ	00111	310	7000	30	01/06/94	31/10/94	14	1315	1645
RJ	00111	310	7000	30	01/06/94	31/10/94	26	1355	1725
RJ0bru	00117	310	7000	30	01/06/94	31/10/94	35	1135	1645
RJ	00157	310	n/a	n/a	24/09/94	29/10/95	7	0545	0915
RJ	00157	310	n/a	n/a	30/10/94	29/04/95	7	0510	0855

Notes to the Schedule

				<u>Days</u>	
AF	Air France	*	Boeing 707 (Freighter)		
AH	Air Algier	0	1 stop (stop not known)	1	Monday
AZ	Alitalia	00	2 stops (stops not known)	2	Tuesday
GF	Gulf Air	0abu	stop in Abu Dhabi	3	Wednesday
KL	KLM, Dutch	0ams	stop in Amsterdam	4	Thursday
ME	Middle East Airlines	0ank	stop in Ankara	5	Friday
OS	Austrian Airlines	0bru	stop in Brussels	6	Saturday
PK	Pakistan International Airline	0cal	stop in Calcutta	7	Sunday
Q7	Qatar Airlines	0doh	stop in Doha		
RJ	Royal Jordanian	0dub	stop in Dubai		
RO	Tarom Romanian Airline	0hud	stop in Hudayda		
SU	Aeroflot	0kua	stop in Kuala Lumpur		
SV	Saudia	0man	stop in Manama		
TK	Turkish Airlines	0sin	stop in Singapore		
UL	Air Lanka	00mon	stop in Amsterdam & Montreal		

Unit of measurement for volume (of cargo capacity) is metric tons.

APPENDIX 5

The following figures were obtained from AMO's Yearly Agricultural Export Statistics for the years 1990 to 1993. Please note volume is given in metric tons.

Annual Jordanian Fruit Exports (in metric tons)

1 9 9 0 F r u i t E x p o r t s			
Foreign Countries		Arab Countries	
Belgium	0.9	Bahrain	6,383.0
Denmark	3.0	Iraq	293.0
France	2.6	Kuwait	17,839.0
Germany	6.5	Lebanon	15,456.0
Poland	14.0	Qatar	6,877.0
Sweden	1.6	Saudi Arabia	28,714.0
U.K.	229.2	U.A.E.	27,869.0
Total	257.8		103,431.0
Grand Total	103,688.8		

1 9 9 1 F r u i t E x p o r t s			
Foreign Countries		Arab Countries	
Canada	0.5	Bahrain	7,859.0
Czech Republic	29.3	Iraq	1,978.0
Denmark	2.5	Kuwait	61.0
France	6.2	Lebanon	20,665.0
Germany	13.0	Qatar	5,487.0
Netherlands	8.0	Saudi Arabia	15,407.0
Romania	81.0	U.A.E.	21,389.0
Sweden	22.3		
U.K.	315.0		
Yugoslavia	237.5		
Total	715.3		72,846.0
Grand Total	73,561.3		

1 9 9 2 F r u i t E x p o r t s			
Foreign Countries		Arab Countries	
Belgium	53.3	Bahrain	7,917.1
Bulgaria	45.1	Lebanon	9,236.9
Canada	0.2	Qatar	6,898.0
Czech Republic	29.3	Saudi Arabia	31,214.0
Denmark	3.0	U.A.E.	21,071.2
France	0.5	Other	126.8
Germany	5.7		
Netherlands	15.6		
Romania	391.8		
Sweden	2.2		
U.K.	394.6		
Yugoslavia	35.5		
Total	976.8		76,464.0
Grand Total	77,440.8		

1 9 9 3 F r u i t E x p o r t s			
Foreign Countries		Arab Countries	
Belgium	1.6	Bahrain	14,910.0
Bulgaria	95.9	Lebanon	8,048.3
Canada	0.3	Qatar	9,304.0
Denmark	1.9	Saudi Arabia	34,995.0
France	1.6	U.A.E.	26,197.0
Germany	11.5	Other	135.4
Indonesia	71.1		
Netherlands	132.4		
Pakistan	0.1		
Romania	342.1		
Russia	147.1		
Sweden	7.1		
U.K.	564.1		
Ukraine	247.7		
Yugoslavia	37.6		
Total	1,662.1		93,589.7
Grand Total	95,251.8		

Annual Jordanian Vegetable Exports (in metric tons)

1 9 9 0 V e g e t a b l e E x p o r t s			
Foreign Countries		Arab Countries	
Austria	147.2	Bahrain	21,368.0
Belgium	1,113.1	Iraq	19.0
Canada	17.5	Kuwait	80,983.0
Denmark	107.4	Lebanon	45,832.0
France	986.0	Qatar	22,832.0
Germany	549.0	Saudi Arabia	187,387.3
Netherlands	134.3	U.A.E.	99,084.3
Poland	26.7		
Sweden	142.0		
Turkey	1,396.3		
U.K.	1,296.3		
Total	5,915.8		457,505.6
Grand Total	463,421.4		

1 9 9 1 V e g e t a b l e E x p o r t s			
Foreign Countries		Arab Countries	
Austria	42.0	Bahrain	25,362.1
Belgium	1,075.0	Iraq	105,692.4
Canada	18.3	Kuwait	461.0
Denmark	154.0	Lebanon	35,761.6
France	1,019.3	Qatar	16,009.0
Germany	390.2	Saudi Arabia	15,504.9
Hungary	20.0	U.A.E.	58,108.4
Netherlands	92.0		
Sweden	131.0		
Switzerland	28.0		
Turkey	484.0		
U.K.	681.5		
Yugoslavia	94.0		
Total	4,229.3		256,899.4
Grand Total	261,128.7		

1 9 9 2 V e g e t a b l e E x p o r t s			
Foreign Countries		Arab Countries	
Austria	67.8	Bahrain	37,404.8
Belgium	224.3	Lebanon	39,706.4
Canada	16.8	Qatar	23,485.0
Denmark	51.8	Saudi Arabia	120,182.7
France	186.0	U.A.E.	83,091.1
Germany	157.5	Other	4,496.5
Hungary	20.0		
Malaysia	1.1		
Netherlands	28.8		
Romania	452.3		
Sweden	42.3		
Turkey	71.4		
U.K.	134.5		
Total	1,454.6		308,366.5
Grand Total	309,821.1		

1 9 9 3 V e g e t a b l e E x p o r t s			
Foreign Countries		Arab Countries	
Austria	39.9	Bahrain	72,091.7
Belgium	263.3	Lebanon	49,881.6
Bulgaria	246.3	Qatar	26,219.1
Canada	25.7	Saudi Arabia	1.3
Czech Republic	20.0	U.A.E.	93,763.3
Denmark	52.4	Other	492.0
France	180.7		
Germany	207.5		
Hungary	58.0		
Macedonia	30.6		
Netherlands	4.2		
Poland	38.0		
Romania	538.3		
Russia	10.8		
Sweden	159.6		
Turkey	4,068.9		
U.K.	251.8		
Ukraine	44.6		
Yugoslavia	91.7		
Total	6,332.3		242,449.0
Grand Total	248,781.3		

SELECTED BIBLIOGRAPHY

1. Agricultural Marketing Organization, Annual Agricultural Statistics, AMO: Amman, for fiscal years 1990 to 1993 inclusive.
2. Boustani, R., and Fargues, P., "The Arabs in the World" in The Atlas of the Arab World: Geopolitics & Society, Bordos SA: Paris, 1990.
3. The Economist Intelligence Unit, Country Profile: Jordan 1994-95, EIU Ltd: London, 1994.
4. Food & Agricultural Organization of the United Nations, The Food & State of Agriculture 1992, UNFAO: Rome, 1992.
5. Food & Agricultural Organization of the United Nations, Trade Yearbook 1992, UNFAO: Rome, 1992.
6. Marks, Jon, Into the Single Market: A MEED Practical Guide to Business in the New Europe, Middle East Economic Digest: London, 1993.
7. Royal Jordanian, Past, Present, Future, (21st issue) Planning Department: Amman, 1993.
8. United Nations, Demographic Yearbook 1992, (44th issue), Washington DC, 1994. Table 5 "Estimates of mid-year population 1983-1992," p.128.
9. United Nations, World Economic and Social Survey 1994: Current Trends and Policies in World Economies, Department of Economic & Social Information & Policy Analysis: New York, 1994.
10. The World Bank, Trends in Developing Economies 1993, WB: Washington, DC, 1993.
11. The World Bank, The World Bank Atlas, Washington DC, 1994.