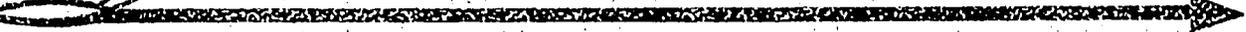




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KENYA EXPORT DEVELOPMENT SUPPORT



MIDDLE EAST MARKET SURVEY

FOR

SELECTED KENYAN FRESH

AND PROCESSED PRODUCE

**Development Alternatives, Inc.
USAID Contract No. 623-0249-C-00-2021-00
KEDS Project P.O. Box 40312 Nairobi, Kenya**

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Middle East Market Survey
for
Select Kenyan Fresh and Processed Produce

Prepared by: David Jones, Fintrac Inc.

AID Contract No. 623-0249-C-00-2021-00

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TABLE OF CONTENTS

	PREFACE	i
I.	BAHRAIN	
	OVERVIEW	1
	FRUIT	3
	VEGETABLES	6
II.	DUBAI	
	OVERVIEW	10
	FRUIT	13
	VEGETABLES	18
III.	SAUDI ARABIA	
	OVERVIEW	23
	FRUIT	25
	VEGETABLES	30
	APPENDIX A: REPRESENTATIVE LIST OF BAHRAIN IMPORTERS	
	APPENDIX B: REPRESENTATIVE LIST OF UNITED ARAB EMIRATES IMPORTERS	
	APPENDIX C: REPRESENTATIVE LIST OF SAUDI IMPORTERS	

PREFACE

This Middle East report covers Bahrain, Dubai, and Saudi Arabia. It is part of a country survey series for select Kenyan fresh and processed produce. Other country reports (Germany, France, Netherlands, U.K., U.S., Hong Kong and Singapore) utilize a "ranking" system to quickly clue readers into key product opportunities. We will not do that here because a lack of adequate statistical data makes a numerical analysis difficult, but the thumbnail "sketch" of potential opportunities provided below clearly underscores the merit of further on-site research and market development.

Best Product Opportunities in Middle East Markets			
Key Products	Bahrain	Dubai	Saudi Arabia
Mangoes	Good	Good	Good
Strawberries			Good
Avocados		Potential	
Fine Beans		Potential	Potential
Other Fresh Vegetables		Potential	
Other Fresh Fruit	Potential		Potential
Cut Flowers		Potential	
Fruit Juices			Potential
KEY: "Potential" - Possible market; on-site research warranted "Good" - Strong opportunity indicated by initial research			

Before any further examination is undertaken however, Fintrac does recommend that the KEDS team confer with HCDA and FPEAK to garner exporter feedback on trade to date with the Middle East. There are negligible figures showing up for a range of Kenyan produce on the markets in 1989 for example -- were these trial shipments, or simply the efforts of one small exporter? And with reference to the Ngowe mango, Kenya apparently had existing medium-sized markets in both Dubai and Saudi Arabia as of 1990 -- and yet in-country discussions with a KEDS horticultural specialist in August 1992 indicated recent problems with varietal preferences. (India and Pakistan do provide different varieties from Kenya, but their supply season is March through August, with Kenya's window from September - February, and our research shows that the Ngowe flavor might actually be preferred by some consumers.)

At any rate, these types of questions can only be answered through discussion with identified Kenyan exporters because there are no written sources providing explanations. Similarly, the

lack of Middle Eastern statistics, and formal grades and standards, means that accurate import information for the most part must be provided directly by the importers themselves. One of the main purposes of this document in fact is to present a fairly in-depth description of reputable importers in Bahrain, Dubai, and Saudi Arabia (based on the author's experience) so that professional trade discussions and negotiations can more easily commence.

One final note -- given its importance as a regional trade center, already existing and increasing markets for mangoes and fresh vegetables, and a network of speciality importers, we recommend focusing on Dubai in particular.

Section I: BAHRAIN

OVERVIEW

Country Profile

Bahrain is an archipelago of 33 islands, and, at 260 square miles, is about twice the size of Washington, D.C. It has a population of about 520,000 (1990 Census), which comprises approximately two thirds Bahraini's and one third expatriates, and is situated 15 miles off the coast of Saudi Arabia. The country is hot and humid from June to September but mild through the remainder of the year. English is the accepted language of commerce.

The country is overwhelmingly Islam (mostly Shi'a Muslim) though there are small enclaves of Catholics, Protestants and Jews. Literacy is high, at 80%, and per capita GDP in 1989 was about \$7,750. Bahrain is an independent Emirate and is not a member of the United Arab Emirates (UAE).

Domestic Economy

One of the first Gulf States to discover oil, Bahrain adopted the fortunate policy of pouring oil revenues into infrastructural development and economic diversification. While oil exports accounted for 75% of GNP in 1975, today they account for less than 20%, as the country has developed its banking and finance, transport and communication sectors.

The 1990 Gulf crisis badly damaged the country's banking sector, but Government and private sector support quieted the ensuing financial panic when Iraq invaded Kuwait, and today banking and finance have resumed their normal pace.

There has been a tourism "boomlet" in Bahrain, and the single most important economic development in the past several years has been the completion of the King Fahad Causeway linking Bahrain directly to Saudi Arabia and other Gulf countries. The causeway has also helped Bahrain become a hub for transport and finance.

Domestic Production

Only 1% of the GDP of Bahrain is accounted for by agriculture. Annual rainfall is less than 2" and is concentrated in Dec-March. Cucumbers, tomatoes, cauliflower, zucchini, lettuce and watermelon are all grown locally, however the market for imported fruit and vegetables is increasing. The value of imports has grown by 14% since 1985 (*See Figure 1*).

Figure 1: Bahrain Imports, US\$1000

	1985	1986	1987	1988	1989	1990
Fruits and Vegetables	63,402	59,215	59,741	62,731	64,926	72,077

Source: *FAO Trade and Commerce Directory, 1990*

Bahrain was formerly a major shipping point for goods into Saudi Arabia, especially the North-Eastern portion. With the Saudi Government's insistence on shipment of goods destined for Saudi through that country's own ports, this traffic has been virtually eliminated, and thus, the re-export segment, unlike Dubai, is non-existent. The market is now characterized by a small, upscale market for expensive imported goods for the hotel/restaurant trade and the wealthy Arab expatriate community, and a larger volume market for the remaining population.

Channels of Distribution

Bahrain has a combined wholesale and retail fruit and vegetable market which accounts for the major portion of all trade. The supermarkets tend to cater to the expatriate and upscale Arab community, with open markets serving the majority of the community.

Channels of distribution are similar to those in Dubai, though significantly smaller in size. A list of the major fruit and vegetable importers, wholesalers and retailers is supplied in Appendix A. The wholesale prices quoted for the items under review were provided during a telephone conversation with Mr. Ebrahim Alameer of Nader & Ebrahim S/O Hassan Co (W.L.L) on 3/11/92.

Terms of trade to the retailer are 15-30 days credit, and to the wholesaler/importer, 30 days. Wholesalers/importers work on a commission of 8-10% after expenses (labor, transport from airport, storage fees, etc). A few larger wholesalers buy for their own account and to their own specifications after the seller has built trust in the marketplace.

Quality Standards and Food Safety

There are no apparent established standards, other than that a health officer must certify that the product is suitable for human consumption. There are no pesticide checks.

FRUIT

Fresh Mangoes

There are no separate statistics for mangoes. These are included under the category 'other fresh fruit' (See Table 1) which accounted for US\$2.6 million in 1990. 42% of the volume of 'other fresh fruit' came from Pakistan but this accounted for only 35% of the value. Other major suppliers were India, Iran and Lebanon.

The importer, Nader & Ebrahim S/O Hassan. Co. (W.L.L), has expressed interest in receiving quotations for Kenyan mangoes. The current average wholesale price for a 6kg box of imported mangoes is US\$8-8.50. (Nader & Ebrahim is one of the larger Bahraini importers and was contacted because of their interest in mangoes and other exotic fruit.)

TABLE 1: Other Fresh Fruit

	W (Kg) 1990	V (US\$) 1990	W (K) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Lebanon	321,009	117,604	325,765	102,391	420,962	165,396
France	54,753	92,050	18,853	28,032	2,992	11,122
Spain	81,982	99,082	77,759	91,471	96,043	132,699
India	424,154	440,535	454,209	485,673	256,651	341,407
Iran	400,706	188,630	377,147	170,500	250,973	114,973
New Zealand	79,484	157,524	78,101	174,729	43,422	93,729
Egypt	109,037	117,285	70,876	85,231	91,421	91,848
Netherlands	9,299	53,625	8,621	35,005	11,460	48,207
Sri Lanka	53,308	59,731	69,384	77,646	52,623	64,644
Pakistan	1,317,741	926,747	510,407	409,258	421,680	393,375
Thailand	27,843	81,481	34,218	103,596	21,513	62,665
Australia	39,574	147,785	36,179	139,912	98,120	303,463
Kenya	12,003	16,101	8,108	11,819	1,711	3,420
Other	198,727	152,381	307,705	190,655	161,600	175,927
TOTAL	3,129,620	2,650,561	2,377,332	2,105,918	1,931,171	2,002,875

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

Strawberries

Again, there are no separate statistics for strawberries. These are imported under the general category of 'berries' (See Table 2). In 1990, the volume of imported berries was 60 tons valued at US\$ 240,370. The major supplier was the USA followed by Egypt. The current wholesale price quoted for a kilo of premium quality strawberries is US\$2.00.

TABLE 2: Berries, Fresh, Chilled

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
United Kingdom	240	1,008	345	1,630	264	1,407
Egypt	10,922	34,896	2,606	9,303	1,630	4,452
UAE	9,182	40,322	4,779	27,327	6,122	34,191
France	144	1,213	794	4,729	406	2,899
Netherlands	2,508	23,152	3,224	19,452	6,739	15,654
Cyprus	137	822	237	1,476	66	394
USA	32,255	105,750	54,022	136,141	32,428	129,803
Australia	3,450	23,835	8,751	43,181	59,867	130,654
New Zealand	1,507	8,008	0	0	0	0
Spain	0	0	2,776	14,878	980	6,040
Turkey	0	0	6,616	22,896	0	0
Kenya	0	0	400	1,178	0	0
Other	210	1364	26,617	10,213	6,041	28,384
Total	60,555	240,370	111,167	292,404	114,543	353,878

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

Passionfruit

No separate statistics exist for passionfruit. Again these would be included under the 'other fresh fruit' category.

Fruit and Vegetable Juices

No separate statistics exist for passionfruit juice or mango juice. In 1990, Bahrain imported 6,726 tons of fruit and vegetable juice valued at US\$5,397,019 (See Table 3). This market has increased in volume and value by approximately 10% since 1988. Major suppliers are Malaysia, the United Arab Emirates, the UK and the USA.

Frozen Fruit

The total market for imported frozen fruit was worth US\$46,577 in 1990 (See Table 4) which represents a decline of 28% since 1988. The main suppliers of frozen fruit are Denmark, the USA and the Netherlands.

Fresh Avocados

No separate statistics exist for fresh avocados. The current wholesale price for a 5kg box is US\$8.00.

TABLE 3: Fruit & Vegetable Juices

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Malaysia	809,534	348,452	711,885	320,282	354,754	163,229
UAE	325,579	22,061	209,140	123,407	44,500	19,434
UK	251,997	227,439	306,082	299,141	306,156	247,378
Denmark	234,908	465,633	303,641	466,947	272,877	450,226
Oman	76,581	52,577	14,312	10,551	29,349	21,955
Austria	43,447	78,625	21,740	42,343	20,181	26,516
France	65,236	78,391	18,200	21,231	34,521	28,290
Netherlands	32,495	76,194	52,363	87,242	121,225	97,380
Belgium	22,877	41,266	42,119	76,191	20,686	40,934
U.S.A.	237,798	272,372	365,230	374,258	392,202	421,043
Saudi Arabia	3,684,176	2,727,229	3,626,985	2,550,035	2,753,816	1,951,434
Kuwait	541,195	460,383	978,794	756,061	672,125	472,910
India	170	242	112,930	122,702	2,052	5,298
Singapore	116,916	127,601	96,992	135,862	321,608	326,646
Japan	11,430	11,418	59	138	67,460	82,226
S. Korea	0	0	0	0	532,120	440,418
Kenya	0	0	165	832	0	0
Other	271,789	407,136	174,639	161,873	121,255	135,752
Total	6,726,128	5,397,019	7,035,276	5,549,096	6,066,887	4,931,069

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

TABLE 4: Frozen Fruit

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Denmark	8,000	23,274	7,670	24,194	6,702	21,697
USA	3,537	11,295	4,172	10,819	8,497	18,684
Netherlands	3,000	5,965	80	335	7,000	12,718
France	6	35	105	543	306	713
U.K.	81	471	81	503	458	3,040
Germany	100	117	0	0	0	0
New Zealand	2,012	6,420	0	0	0	0
S. Korea	0	0	0	0	7,100	9,101
Total	16,736	47,577	12,108	36,394	30,063	65,953

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

VEGETABLES

Cherry Tomatoes

The current wholesale price for a kilo of cherry tomatoes is US\$1.50 - 2.00. No separate statistics are available. However, the total market for imported tomatoes is growing and reached 8,105 tons in 1990 valued at US\$1,869,899 (*See Table 5*). The majority of airfreighted tomatoes are supplied from the Netherlands.

TABLE 5: Tomatoes

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Jordan	7,361,300	1,541,338	3,812,440	805,356	2,802,890	655,359
Saudi Arabia	577,024	165,332	237,562	103,859	149,295	48,327
Netherlands	31,494	108,152	30,652	85,934	33,665	94,638
Lebanon	31,486	9,923	44,050	10,465	816,391	177,213
Syria	33,570	7,311	68,705	14,742	25,760	5,537
Swaziland	13,730	3,689	1,000	215	0	0
U.S.A.	0	0	0	0	76,203	62,981
Egypt	1,725	423	87,772	40,293	68,095	53,519
Turkey	4,250	1,069	1,266,893	279,678	1,479,906	326,495
Kenya	0	0	0	0	7	48
Other	51,265	32,662	5,292	15,083	8,989	16,096
Total	8,105,844	1,869,899	5,554,366	1,355,625	5,461,201	1,440,213

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

Fine Beans and Bobby Beans

All imported beans are classified under one category, 'beans, fresh'. The total market for fresh beans in 1990 was 547 tons valued at US\$163,609 (*See Table 6*). This represents an increase in volume of 53% on the level imported in 1988 and a decrease in value of 6%. The main suppliers of beans are Jordan and Saudi Arabia. The main suppliers of airfreighted beans are India, Egypt and Thailand.

Mangetout/Asparagus/Okra/Chilies

There are no separate statistics for these items. All are categorized under the heading 'other fresh vegetables'. 12,375 tons of 'other fresh vegetables' were imported into Bahrain in 1990 valued at US\$8,421,114 (*See Table 7*). Compared with 1988, the market has grown in volume by 17% but decreased in value by 6%. The current wholesale price for okra is US\$1.50 per

TABLE 6: Beans, fresh

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
India	6,841	6,537	9,806	9,854	15,709	19,878
Egypt	20,153	19,064	14,264	15,926	48,226	42,532
Thailand	2,157	7,832	450	1,513	2,065	7,985
Jordan	433,996	96,734	322,160	73,676	259,670	60,798
Saudi Arabia	72,332	17,707	3,165	676	0	0
Kenya	0	0	95	572	300	556
Other	11,742	15,735	5,921	11,267	31,692	42,604
Total	547,221	163,609	355,861	113,484	357,662	174,353

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

TABLE 7: Other Fresh Vegetables

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
U.S.A.	599,547	482,372	426,694	382,484	245,724	184,766
Australia	186,446	464,051	499,528	765,239	1,030,130	1,329,215
Indonesia	270,230	215,758	196,130	155,476	149,032	108,402
India	3,301,184	3,270,152	3,526,777	3,605,239	3,185,545	3,787,199
Egypt	543,992	481,056	442,105	386,872	271,022	242,120
Sri Lanka	321,544	373,489	423,680	509,992	455,957	563,029
Bangladesh	138,033	162,941	151,785	196,223	114,971	141,327
Thailand	75,983	118,987	98,797	117,612	102,234	134,277
Taiwan	5,547	4,471	28,638	24,574	66,050	56,245
Pakistan	289,418	211,691	597,223	447,415	511,557	470,886
Netherlands	121,578	539,931	142,462	490,894	194,165	522,404
France	19,409	50,303	130,363	130,277	9,652	57,614
Kenya	1,606	3,439	1,478	3,691	505	2,484
Jordan	2,385,102	517,181	1,914,438	434,332	1,847,687	450,279
Turkey	201,575	148,777	334,093	245,598	244,192	134,231
Cyprus	20,266	61,540	32,065	86,375	52,064	128,689
Iran	395,322	137,622	318,796	73,840	218,070	35,447
Saudi Arabia	2,184,111	750,293	896,971	341,947	640,373	146,553
Lebanon	1,225,643	325,854	1,033,234	242,008	1,127,880	304,415
Other	88,644	101,206	107,180	122,875	118,520	159,514
Total	12,375,180	8,421,114	11,302,437	8,762,963	10,585,330	8,959,096

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

In 1990, the market for frozen vegetables was worth US\$1.8 million (See Table 8). This has grown by 42% since 1988. No separate statistics are provided for individual products.

TABLE 8: Frozen Vegetables

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Netherlands	425,186	430,383	372,454	382,612	322,991	330,189
Belgium	233,451	251,455	166,248	159,040	124,094	129,936
Denmark	64,761	124,575	73,328	114,128	96,490	157,771
U.K.	208,342	459,008	152,979	324,872	122,739	244,221
U.S.A.	225,919	345,872	151,108	211,388	157,305	187,638
Canada	65,480	83,362	73,856	100,793	101,126	111,582
Other	138,901	148,614	94,883	125,744	109,399	139,434
Total	1,362,040	1,843,239	1,084,856	1,418,577	1,034,144	1,300,771

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

CUT FLOWERS AND BUDS

The market for cut flowers and buds in Bahrain was worth US\$889,181 in 1990 (See Table 9). This has decreased in value by 3% since 1988 and volume has decreased by 16%. The major supplier is the Netherlands although Saudi Arabia is quickly increasing its market share, reflecting the Saudi Government's push to increase production.

TABLE 9: Cut flowers and buds

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
SEA						
Netherlands	632	14,604	356	14,085	80	625
Sri Lanka	-	-	70	713	-	-
Singapore	-	-	150	5,221	-	-
AIR						
UAE	1,199	14,745	650	9,064	1,502	19,612
Netherlands	52,411	741,668	69,016	830,250	66,284	807,375
United Kingdom	-	-	160	3,255	-	-
Saudi Arabia	2,868	36,750	1,861	23,952	60	240
Sri Lanka	5,285	49,505	5,578	50,037	4,443	43,138
Cyprus	2,819	20,303	2,747	20,771	4,721	34,178
Malaysia	235	1,662	25	338	-	-
Singapore	218	2,508	100	2,306	56	1,093
Thailand	223	1,979	299	3,519	612	2,713
Kenya	-	-	50	909	35	162
LAND						
Saudi Arabia	205	3,391	-	-	-	-
Total	66,525	889,181	81,289	967,050	79,013	915,930

Source: State of Bahrain Central Statistics Organization, Directorate of Statistics

NOTE ON BAHRAIN MARKET: Very little information apart from cumbersome data was available in London on this relatively important market. Given its geographical location, further field research may be necessary.

OVERVIEW

Country Profile

There are 7 emirates which make up the UAE - Abu Dhabi, Dubai, Sharjah, Ras Al-Khaimah, Fujairah, Umm al-Qaiwain and Ajman. Dubai, with an area of approximately 1,500 square miles, has a population of roughly 500,000 people. The official language is Arabic; English is generally understood in business circles.

Domestic economy

The country's infrastructure was built up in a period of rapid growth in the 1970's, which halted with the fall in oil prices and the government's adoption of tight fiscal policies. Although existing projects are being completed, the government budget for development has been cut by a quarter. Falling rents and an estimated 10% contraction in the expatriate population reflect the current recession. Dubai's re-export trade has been affected by the Gulf war. The domestic economy is likely to remain depressed so long as the government retains tight control over expenditure. Abu Dhabi is financially dominant, providing almost 75% of federal revenues and grants to smaller emirates.

External trade

Dubai is the main trade center, and accounts for over 60% of UAE's imports (1985). Almost 40% of Dubai's re-export trade is accounted for by the neighboring countries of Iran, Saudi Arabia and Qatar.

Domestic Production

The UAE's harsh climate and sandy soil make self-sufficiency in food production unlikely, although locally grown tomatoes, cucumbers, cabbages, aubergines and other vegetables are produced in surplus during the winter months (December - February). Also, 80% of roughage and forage crops are supplied locally -- still overall production accounts for less than 30% of the total horticultural market.

Water supplies and distribution are a constant source of problems, and salinity also depletes productivity. Since the mid-eighties, the Government has attempted to rationalize production to encourage sectors such as livestock breeding and fishing and to discourage the cultivation of certain vegetables. Fruit production consists mainly of dates, citrus and mangoes. Ras Al-Khaimah, which has greater rainfall, has the best developed agricultural sector in the UAE.

Although the population in the Emirates is relatively small, Dubai acts as an entrepot for the distribution of produce throughout the Gulf and indeed the Middle East as a whole. Specifically it

supplies Oman, Saudi Arabia (the Eastern areas), Bahrain and Kuwait.

The UAE recognize that self-sufficiency can only be realistic for certain produce, and imports are still on the increase (See Figure 1). During the period from 1986 to 1990, total fresh vegetable imports have increased almost 60%, from 109,000 tons to 163,000 tons, while value has increased a similar amount. Imports of fruit have not risen as sharply and value has fallen.

FIGURE 1: Imports of Fresh Fruit and Vegetables

	1986		1987		1988		1989		1990	
	Q	V	Q	V	Q	V	Q	V	Q	V
Total Fresh Veg	109,087	32,534	152,500	33,209	131,480	32,877	146,304	41,617	163,132	50,900
Total Fresh Fruit	221,881	80,381	234,831	64,593	259,992	68,925	250,270	71,380	254,054	67,624
KEY: "(Q)quantity" = Tons, "(V)alue" = US\$ thousands (Converted at the rate of US\$1 = 3.687)										

Source: Dubai External Trade Statistics

Channels of Distribution

(Information for this section was compiled on site by the author.)

The market for fruit and vegetables in Dubai is dominated by, on the one hand, a few large companies selling directly from their cold stores and, on the other hand, the wholesale market itself, in which importers and commission agents operate.

By far the largest fruit and vegetable importing company in Dubai is Abbar & Zainy (See Appendix B). This company imports bulk produce from all over the world and sells directly to wholesalers and retailers in the Emirates. It is also involved in the re-export of produce to neighboring countries. It has two very large cold stores, its own fleet of refrigerated trucks, and a small fleet of refrigerated ships. It imports on a firm price basis and sells on the same basis to its customers, who physically trans-ship the produce from the cold store. Over 90% of its operations are in bulk produce and it is only interested in orders of a minimum size of 1,000 tons.

The wholesale market is a thriving daily means of exchange for fruit and vegetables from all over the world. The bulk of supplies come in by refrigerated truck from Turkey, Greece, Syria, Lebanon, and Jordan. Small ships also bring large quantities of produce from Iran, Pakistan and India. Fresh produce arrives every day by either of the above-mentioned forms of transport and is sold in the wholesale market either by importers or commission agents. Dubai has a preponderance of importers working on a fixed priced basis, rather than agents selling on commission. There are also hybrid

Although there are a very large number of companies working on the wholesale market, not many are reliable for distant trading. One with a reputation for honesty and efficiency among the ranks of the large importer/commission houses is Farzana Ltd (*See Appendix B*). This company is based in the Al Hamryia Wholesale Market. It has been in operation for over twenty years and imports produce from all over the world, sometimes working on a firm price basis, or sometimes selling on a consignment basis. Most of its consignment work is done for produce coming from nearby countries, whereas for more distant suppliers it agrees on a C&F price, paying a week after arrival. The company has, in the past, expressed interest in receiving airfreighted off-season supplies of strawberries, cherry tomatoes and mangetout.

Other reputable companies working on the wholesale market include Smart Trading Company (operating also under the name of Sandrilla Trading Company), Al Sughaiyer Trading Company, Iran-Dubai Company, the Jordanian Gulf Company, The Fruit and Vegetable Company and the Khamas Cold Store Company. Details of all these companies are provided in Appendix B.

There is another category of distribution channel existing in the Dubai market, namely the specialist importer. Although these specialist importers only cater for around 10% of the total Dubai market, they do concentrate almost exclusively on airfreighted produce from distant countries. They are responsible for distributing this produce to specialized market outlets, notably supermarkets, first-class hotels, restaurants, the catering trade and the airlines. Although the quantities involved are relatively small, this is a high-value trade.

The typical specialized importer in Dubai works on an agreed price basis, being in almost daily telex and fax contact with its suppliers throughout the world. Suppliers provide the specialized importer with weekly details of quantities, varieties and prices, CIF Dubai, of available produce. The specialized importer checks his own market outlets, compares prices and telexes or faxes his requirements through to suppliers. On average he receives supplies two to three days after placing his order. Payment is normally made on a monthly statement basis, i.e. thirty days after receipt, which means, given delays within the banking system, approximately 40 days before the supplier receives payment. Although this is the normal system of payment, some of the specialized importers would be prepared to commence on a letter of credit basis with a new supplier. They all feel, however, that a letter of credit system is not suitable for small quantities of airfreighted fresh produce.

Of the specialized importing companies based in Dubai, there are three which are superior to the others, and are the ones used almost exclusively by the main supermarkets (at present the supermarkets do not import directly in Dubai). The companies are: Greenhouse Supermarket Company (not a supermarket), Kibson's International, and Barakat Company. All three companies are major suppliers to specific retail and service outlets and all have similar set-ups in terms of ordering by fax or telex, receiving on a weekly basis and paying on a monthly basis. The company which appears to be the best informed, the most modern and the most specialized in terms of catering solely to supermarkets, hotels etc., is Greenhouse Supermarket, based in Sharjah. This company only trades with specialized outlets, whereas Kibson's International and Barakat also deal on the wholesale market.

Packaging and Labeling

While there are no specific requirements for fresh produce in general, what is desired is name of item, list of ingredients, net contents, name and address of producer/packer, and country of origin. The name of the importer, exporter, distributor or seller may also be included. In the case of imported goods, the requirement for pre-packaged foods is that Arabic must be among the languages used on the label, and it is recommended, though not required, that Arabic be used in labeling of fresh produce as well.

Quality Standards and Food Safety

Quality standards are imposed by the United Arab Emirates. The emphasis is on food safety, and imports are checked: shipments that reflect obvious spoilage, or that are mislabeled, etc, are rejected.

There are no specific written legal quality requirements pertaining to approved cultivars, size, shape, weight, color or count. The Food Control Unit of the Dubai Municipality state that there is a technical requirement for a phytosanitary certificate issued from a Government institution, and that checks are made for alar, a product used primarily on apples.

FRUIT

Fresh Mangoes

The major variety of mango available in the Dubai market is the small sweet Alphonso variety from India. There are also very small specialized markets for Kent, Haden and Sensation mangoes, and a medium-size market for the Ngowe flat yellow mango from Kenya.

In 1990, Dubai imported 13,775 tons of mangoes valued at US\$9,433,489 (*See Table 1*). This represents a 14% increase in volume and a 2% decrease in value on the level imported in 1988. Major suppliers were Pakistan, India, Kenya and Sri Lanka.

From March through to August, very cheap and reasonable quality mangoes coming from India and Pakistan dominate the market. However, a niche exists for Kenyan, airfreighted mangoes in the so-called off-season in September/October through to February.

TABLE 1: Mangoes, fresh

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
USA	-	-	113	203	-	-
India	6,359,957	5,735,235	8,565,934	6,619,337	4,915,993	5,117,258
W Germany	-	-	-	-	669	798
Netherlands	786	2,665	2,333	5,692	15,790	62,151
Iran	4,000	513	7,000	1,540	704	575
Australia	63,532	183,243	17,291	86,608	75,578	262,901
Pakistan	6,724,665	2,470,273	7,728,606	3,156,964	6,497,417	3,291,756
Malaysia	-	-	1,581	10,437	-	-
Thailand	1,375	4,230	2,914	7,783	27,536	74,114
Kenya	373,126	736,633	527,757	896,116	336,555	611,783
Brazil	-	-	2,456	7,325	930	2,967
Chile	-	-	-	-	15	15
Somalia	48,652	61,084	43,959	62,362	1,000	1,572
Sri Lanka	179,912	205,462	88,227	96,491	97,267	112,520
Swaziland	-	-	-	-	7,377	14,104
Egypt	8,425	15,864	689	1,075	-	-
Sudan	11,100	17,843	27,856	35,139	7,400	14,172
Tanzania	-	-	8,501	10,787	37,285	57,110
Bangladesh	-	-	17	31	1,480	4,672
Mexico	-	-	225	501	82	207
Ethiopia	-	-	-	-	2,214	3,701
Puerto Rico	113	444	1,706	5,396	10,802	29,363
Zambia	-	-	168	586	-	-
Peru	-	-	2,598	7,259	712	2,924
Costa Rica	-	-	200	472	-	-
Venezuela	-	-	120	301	90	322
Total	13,775,643	9,433,489	17,030,251	11,012,405	12,036,896	9,664,985

Source: Dubai External Trade Statistics

Strawberries, fresh or chilled

Imports of strawberries have only been reported since 1989. In 1990, 152 tons valued at US\$ 650,848 were imported primarily from the USA (See Table 2), with smaller volumes arriving from Australia and the Netherlands. The market did not increase in volume year-on-year but value increased by 7%. According to a local retailer, domestically grown strawberries are improving in quality and this probably accounts for the lack of growth in imports.

The major variety available in the market is the Chandler, coming from California and Florida. Purchases of Tioga, Selva and Senga Sengana hybrids are also made throughout the year. There is a steady specialized demand for strawberries by supermarkets, hotels, restaurants, the catering trade and the airlines.

In March 1992, the price offered FOB France for Spanish strawberries was US\$1.51 for 16 x 250g punnet. Wild strawberries from South America were quoted at US\$5.69 for 12 x 125g punnet.

TABLE 2: Strawberries, fresh or chilled

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg)V(US\$) 1988\1988
United Kingdom	48	192	-	-	--
USA	118,597	493,076	104,794	397,746	--
Netherlands	11,781	50,560	17,840	74,774	--
France	260	1,422	1,902	9,792	--
Australia	12,446	76,484	14,639	76,420	--
Belgium	505	944	-	-	--
Malaysia	-	-	55	127	--
Denmark	5,273	10,824	1,515	2,661	--
Spain	18	97	2,691	11,964	--
Greece	-	-	14	54	--
Thailand	-	-	1,835	6,372	--
Kenya	846	3,492	691	1,561	--
Cyprus	95	579	-	-	--
Ecuador	-	-	539	3,590	--
Sri Lanka	-	-	1,449	3,506	--
Egypt	158	215	180	490	--
Guatemala	2,112	12,963	-	-	--
Mexico	-	-	1,296	7,643	--
Costa Rica	-	-	2,246	13,376	--
Total	152,139	650,848	151,686	610,076	--

Source: Dubai External Trade Statistics

Passionfruit

No separate statistics are available for passionfruit. Imports of these items would be included under the "Other Fresh Fruit" category which is dominated by Iran, Pakistan and India (See Table 3). Overall, imports under this category have declined in volume and value since 1988.

TABLE 3: Other Fresh Fruits

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
UK	8,843	7,332	9,022	2,458	9,400	7,979
USA	160,348	505,034	148,778	450,051	224,479	710,548
India	1,007,051	1,696,485	1,122,881	1,258,167	1,051,266	1,326,063
West Germany	-	-	61	267	1,653	2,224
Netherlands	9,512	30,635	14,387	32,644	50,179	136,442
France	244,432	491,415	181,749	390,705	11,002	40,992
Iran	2,492,473	757,507	6,440,980	1,594,632	1,520,171	837,880
Italy	118,190	210,675	6,111	16,789	21,977	47,731
China	-	-	55	126	-	-
Singapore	-	-	-	-	1,104	3,417
Australia	556,552	1,497,825	344,339	1,061,077	392,201	1,109,763
Belgium	2,065	3,794	1,998	3,775	-	-
Pakistan	2,236,898	1,763,582	3,108,125	2,308,820	3,865,220	2,914,166
Malaysia	53,886	127,247	36,199	85,240	1,661	4,492
Romania	-	-	140	276	-	-
Denmark	1,830	4,747	-	-	670	1,674
Spain	1,093	3,835	7,846	21,812	37,510	66,943
Greece	2,513	8,361	7,798	19,438	5,226	11,871
Thailand	152,098	438,153	168,495	511,275	108,667	319,317
Poland	-	-	782	1,253	85	135
Kenya	52,032	104,063	73,729	108,958	208,605	300,388
Brazil	-	-	1,693	5,429	144,844	78,977
Cyprus	6,631	23,519	607	1,405	3,440	10,049
Canada	-	-	-	-	10	52
Ecuador	-	-	-	-	818	5,833
New Zealand	405,001	750,599	301,686	604,292	347,845	701,054
Chile	174	818	34,271	82,963	6,889	28,659
Somalia	1,015	1,168	10,511	9,281	2,400	2,641
Lebanon	8,509	37,311	1,738	7,680	9,867	31,886
Luxembourg	-	-	17,136	34,765	-	-
Sri Lanka	51,507	55,085	52,656	85,378	393,509	454,895
Swaziland	-	-	-	-	370	504
Malta	-	-	-	-	2,214	6,265
Egypt	12,270	18,471	47,012	65,532	22,716	28,882
Portugal	-	-	-	-	225	537
Sudan	3,500	2,860	-	-	-	-
Syria	1,005	3,198	-	-	-	-
Tanzania	1,000	1,147	-	-	-	-
Turkey	-	-	-	-	10,322	14,083
					175	409

Source: Dubai External Trade Statistics

(Continued on next page)

TABLE 3: Other Fresh Fruit continued ...

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Guatemala	25	176	7	93	78	406
Morocco	-	-	-	-	3,009	4,592
Jordan	13,225	11,165	2,000	1,782	-	-
Indonesia	-	-	570	1,624	1,999	6,178
Bangladesh	1,493	2,300	1,810	1,903	2,370	3,520
Jamaica	-	-	-	-	110	263
Mexico	353	1,287	438	1,863	963	6,169
Argentina	176	455	320	1,387	1,177	5,763
Madagascar	-	-	2,053	13,364	1,146	4,731
Tunisia	14,440	28,456	16,460	32,804	6,620	18,529
Uganda	-	-	-	-	56,402	75,823
Ethiopia	-	-	-	-	13,597	22,969
Libya	27,401	41,642	-	-	-	-
Ethiopia	-	-	-	-	1,015	1,925
Mauritius	1,995	5,157	3,186	11,276	89	437
Zambia	6	28	80	296	-	-
Colombia	118	716	274	1,596	789	3,953
Uruguay	-	-	-	-	66	128
Peru	-	-	-	-	180	1,121
Senegal	-	-	-	-	32	116
Maldives	-	-	6	37	-	-
Costa Rica	-	-	50	406	27	89
Zimbabwe	165	949	3,994	10,610	325	1,398
Venezuela	11	45	-	-	10,228	22,878
Canary Island	-	-	-	-	22	44
Total	7,659,836	8,637,242	12,165,317	8,843,530	8,556,964	9,387,783

Source: Dubai External Trade Statistics

Fruit Juices

Separate statistics do not exist for individual fruit juices but, for the category as a whole, 3,050 tons were imported into Dubai in 1990 valued at US\$2,504,320. Since 1986, the market has decreased by 50% in volume and value. The main supplier is the USA, followed by South Korea, Austria and Singapore.

Avocados

No separate statistics exist for avocados imported into Dubai and the market is small and specialized.

VEGETABLES

Mangetout

No separate statistics are available for mangetout in Dubai. The market is small and very specialized, mainly limited to supermarkets and first-class hotels. The product is in demand by specialist importers (See Appendix B).

Cherry Tomatoes

Similar to mangetout there is a small specialized demand for cherry tomatoes from supermarkets and hotels. They are mainly sold loose.

No separate statistics are available for Cherry tomatoes although the total market for imported fresh or chilled tomatoes has increased in both volume and value since 1988. Main suppliers of tomatoes are Iran, Libya and the Netherlands. In the wholesale market, cherry tomatoes from the USA, Canary Islands and Australia are available. The statistics show that imports direct from these countries are low but a large proportion of cherry tomatoes are re-exported to Dubai via the Netherlands. (See Table 5).

TABLE 5: Tomatoes, fresh or chilled

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Japan	-	-	-	-	3,340	2,729
United Kingdom	342	939	45	14	700	1,175
USA	276	961	106	358	37	127
India	20,997	23,102	67,455	75,724	82,568	87,211
Saudi Arabia	-	-	-	-	643	1,159
Netherlands	77,039	198,930	120,769	253,859	128,620	236,784
France	468	1,322	508	1,444	522	1,666
Iran	2,815,544	410,733	1,128,720	177,487	1,873,745	216,110
Australia	2,011	7,586	1,063	3,962	3,301	9,328
Pakistan	1,085	508	2,315	1,941	12,298	10,670
Spain	5,029	14,593	27,542	59,515	22,004	44,774
Greece	306	704	702	1,113	76	116
Kenya	-	-	25	123	-	-
Cyprus	2,726	6,786	36	88	18	45
Ecuador	105	642	-	-	-	-
Lebanon	289	1,119	-	-	269	1,268
Sri Lanka	-	-	-	-	103	183
Egypt	17,405	14,039	10,081	8,160	31,128	28,712
Portugal	-	-	210	554	2,845	4,505
Syria	-	-	-	-	6,802	6,049
Morocco	-	-	210	495	-	-
Jordan	529	577	-	-	-	-
Libya	191,529	183,544	-	-	-	-
Zambia	-	-	28	127	-	-
Senegal	-	-	31	167	26	169
Zimbabwe	-	-	-	-	29	194
Canary Is.	4,849	13,458	5,414	11,722	6,899	13,255
Total	3,140,529	879,743	1,365,260	596,987	2,175,973	666,229

Source: Dubai External Trade Statistics

Asparagus

The market for asparagus is again small and specialized. No separate statistics exist for the Dubai market. Thai asparagus is available all year round.

In March 1992, the price quoted FOB for French white asparagus (size 12+), packed in bulk, was US\$10.67 per kg for a 4 kg box.

No separate statistics are available. These items, together with asparagus and mangetou: will be included under the general category of 'vegetables - fresh or chilled' (See Table 6). Okra is available locally in May and the interest is mainly in the "off-season" when local produce is not available (Mar-Apr). Minimum quantities for a major retailer would be 500 kilo lots.

TABLE 6: Vegetables, fresh or chilled

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Japan	43,544	34,933	-	-	-	-
United Kingdom	1,744	3,206	18,718	25,396	5,088	9,638
USA	3,583,596	2,458,731	1,996,342	1,510,631	2,726,612	1,934,452
India	4,935,584	5,648,473	5,963,420	5,791,900	5,165,958	5,728,129
West Germany	2,658	3,109	3,229	6,164	2,931	5,093
Netherlands	239,821	640,381	322,217	717,028	820,579	1,516,855
France	23,523	68,008	155,697	187,495	68,037	172,506
Iran	5,937,751	1,414,401	3,501,004	1,007,494	1,989,083	569,311
Italy	6,998	14,712	18,930	39,861	32,678	72,059
Sweden	-	-	37	113	-	-
Hong Kong	-	-	-	-	66	2,108
China	26	98	9,027	5,776	250,000	101,737
Singapore	119	1,578	-	-	26	329
Australia	554,457	675,541	576,182	739,956	773,953	1,038,088
Switzerland	-	-	-	-	220	1,187
Belgium	9,319	9,876	770	2,128	24,599	24,816
Pakistan	2,394,709	1,946,678	2,518,341	1,989,263	1,881,761	1,497,427
Malaysia	4	23	14,173	9,755	12,206	7,769
South Korea	3,000	5,118	320	440	25,001	27,941
Denmark	41	183	36,258	46,643	-	-
Spain	1,012	3,117	72,660	89,547	70,401	147,529
Greece	626	1,747	1,730	3,296	4,106	9,336
Thailand	22,886	75,798	15,591	40,093	35,078	103,245
Kenya	8,146	12,004	15,476	18,547	30,751	45,777
Brazil	30	335	263	1,458	244	1,185
Cyprus	8,864	33,372	19,154	51,116	18,626	54,471
Canada	-	-	110	279	-	-
Ecuador	120	971	-	-	-	-
New Zealand	-	-	610	1,197	68	161
Chile	12	122	2,263	12,576	6,268	7,812
Lebanon	33,360	143,247	15,357	59,331	35,650	98,835
Sri Lanka	208,145	258,260	161,044	184,696	208,765	246,659
Swaziland	-	-	-	-	783	2,384

Source: Dubai External Trade Statistics

(Continued on next page)

TABLE 6: Vegetables, fresh or chilled continued

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Hungary	-	-	1,599	1,307	14	65
Malta	1,175	1,368	-	-	-	-
Egypt	1,385,235	1,330,037	1,047,559	959,880	1,443,630	1,323,726
Sudan	-	-	-	-	198	651
Portugal	-	-	-	-	661	1,401
Syria	-	-	1,279	5,450	-	-
Tanzania	-	-	-	-	654	651
Turkey	-	-	2,874	9,224	-	-
Guatemala	139	806	-	-	129	343
Bolivia	-	-	553	1,491	-	-
Morocco	-	-	-	-	744	1,493
Jordan	15,401	12,807	1,500	1,703	1,140	1,414
Indonesia	43	369	45,359	27,921	-	-
Bangladesh	620,144	694,814	564,996	664,145	646,266	873,731
Mexico	147	1,516	264	2,838	24	94
Argentina	11	76	261	1,503	443	1,944
Madagascar	-	-	1,085	567	679	2,653
Tunisia	-	-	2,150	5,076	-	-
Libya	134,227	150,924	-	-	-	-
Uganda	-	-	-	-	3,046	5,029
Ethiopia	-	-	-	-	5,540	7,233
Ivory Coast	-	-	-	-	22	46
Mauritius	31	61	-	-	10	46
Puerto Rico	-	-	-	-	20	139
Zambia	-	-	20	86	-	-
Colombia	183	1,139	307	2,892	209	1,405
Uruguay	102	977	-	-	118	843
Peru	18	191	-	-	78	472
Costa Rica	-	-	19	123	80	196
Zimbabwe	82	372	58	312	241	1,155
Total	20,177,033	15,649,479	17,108,806	14,276,697	16,293,484	15,651,569

Source: Dubai External Trade Statistics

Frozen Vegetables

Frozen vegetables are classified as one category. In 1990, the total volume of frozen vegetables imported was 3,740 tons valued at US\$4,412,374 (See Table 7). Compared with the figures for 1988, this represents an increase in volume of 27% and an increase in value of 21%. The main suppliers of frozen vegetables are Belgium, Denmark and the USA.

TABLE 7: Frozen Vegetables

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Japan	18,597	43,533	-	-	90	585
United Kingdom	232,578	442,907	297,115	560,656	408,777	786,357
USA	552,086	664,875	440,974	479,239	499,015	564,295
India	20,273	17,218	16,380	11,535	14,300	18,039
W Germany	-	-	1,142	1,756	-	-
Netherlands	773,936	729,859	561,480	499,952	525,161	469,997
France	-	-	17,760	13,389	372	2,389
Italy	63,880	28,776	-	-	39,400	24,002
Sweden	-	-	-	-	4,192	3,610
China	67,800	32,110	-	-	20,929	9,447
Singapore	-	-	7,900	15,881	38,025	134,819
Switzerland	21,584	18,448	-	-	-	-
Australia	-	-	-	-	7,331	12,803
Belgium	916,972	930,275	775,518	759,751	668,162	684,220
Kuwait	1,550	2,370	-	-	-	-
Pakistan	10,400	5,168	85,957	47,365	21,496	6,898
South Korea	-	-	-	-	11,000	8,179
Denmark	838,294	1,238,849	606,364	793,475	448,992	664,303
Spain	4,280	36,925	2,160	16,420	20,609	22,589
Thailand	-	-	21	165	162	685
Yugoslavia	98,685	82,045	-	-	-	-
Canada	30,718	36,915	26,924	55,027	45,466	58,483
New Zealand	27,143	45,800	27,245	33,579	149,759	136,284
Hungary	59,851	53,109	2,060	3,241	412	1,475
Egypt	2,090	3,165	14,587	22,960	23,097	35,214
Total	3,740,717	4,412,374	2,883,587	3,314,391	2,947,147	3,644,673

Source: Dubai External Trade Statistics

CUT FLOWERS

There are no data available on the market for cut flowers in Dubai.

NOTE ON DUBAI MARKET: Very little information apart from cumbersome data was available in London on this relatively important market. Given its geographical location, further field research may be necessary.

Section III: SAUDI ARABIA

OVERVIEW

Country Profile

Saudi Arabia covers over 70% of the Arabian Peninsula and has an area of approximately 920,000 square miles. It is bounded by the Red Sea to the west, Jordan, Iraq and Kuwait to the north. The population is estimated at approximately 7 million plus 3 million foreign workers and expatriates. Arabic is the official language, although English is widely understood in the main towns.

Domestic Production

Saudi Arabia has been the most successful of all Middle Eastern countries in boosting agricultural production. Fruit and vegetables is the sector which has experienced the most rapid growth in recent years (see Figure 1).

Figure 1: Agricultural Production in Saudi Arabia ('000 tons)

	1985	1986	1987	1988	1989	1990*
Vegetables	1,666	1,682	1,941	2,050	2,225	2,320
Fruit	640	646	751	773	807	795

* Estimates

Source: US Department of Agriculture

An important factor behind the growth of vegetable production has been the development of horticulture and greenhouse production. Capital intensive production units, equipped with up-to-date cooling technology and computer controlled operations, produce high value crops such as strawberries, tomatoes and cut flowers. The Government of Saudi Arabia believes that these high value crops have considerable potential for expansion given the high yields, export potential and economical use of water.

However, despite these developments in domestic production, Saudi Arabia still imports large quantities and values of fresh produce (see Figure 2). Imports of fruit and vegetables increased by 8% between 1985 and 1990.

Figure 2: Imports of Fruit and Vegetables into the Kingdom of Saudi Arabia, US\$ million

	1985	1986	1987	1988	1989	1990
Fruit and Vegetables	5,419	4,356	4,645	5,902	5,534	5,790

Source: *FAO Directory of Trade and Commerce 1990*

Industrialists in Saudi Arabia are increasingly putting money into food processing and agro industry. In 1990, a joint stock company called the Food Products Company was established specifically to process Saudi produce. Frozen vegetables have specifically been selected for investment.

Channels of Distribution

(Information for this section was obtained through primary interviews.)

The Jeddah market is dominated by two large companies, responsible for around 70%-80% of the importation of bulk produce. There is also a large wholesale market in which commission agents proliferate, selling their produce in daily auctions.

The two large companies involved in the trade in Jeddah are: Abbar & Zainy Ltd (the sister company to that situated in Dubai) and Mahammed Sharbatly Corporation. Full details are supplied in Appendix C.

The Abbar & Zainy company in Jeddah has a steady supply of produce from 'Swaziland' during the season, and also has its own plantations in various parts of the world. The minimum quantity of produce with which it would be tempted to trade would be around 1,000 tons.

The other company, the Sharbatly Corporation, has two enormous cold stores, a fleet of over 100 refrigerated trucks and its own fleet of 20 refrigerated ships. Furthermore it regularly charters vessels to supply produce. The company has been in operation for almost 40 years and is part of an even larger corporation which has diverse business interests throughout the Gulf. It trades mainly on a negotiated C&F price prior to shipment, with payment being made upon sound arrival of produce in the cold store. It is prepared to work on a draw-down letter of credit basis or even occasionally to make payments in advance.

Apart from the two 'giant' companies mentioned above, commission agents proliferate in Jeddah, selling produce at two daily auctions, one from 5 a.m.-7 a.m. in the morning and the other from 4 p.m.-6 p.m. in the evening. These commission agents deal mainly in bulk produce which comes either from within Saudi Arabia or from neighboring countries. They sell on behalf of their suppliers, extract a commission and handling charges and pay within eight to ten days of final sale of consignment.

and Al-Quraishi Est. All three companies work at the wholesale market in North Jeddah and all three have their own cold stores. These companies also facilitate visas for the representatives of suppliers to act as observers in the market. This is particularly the case for suppliers from Pakistan and India.

Although all three companies are respectable in terms of their position, experience and reputation, existing suppliers find it necessary to have their own observers in the market to watch over proceedings. It is a rough and ready, cut and thrust market and not one in which to base initial trading relationships from long distance.

For low volumes of airfreighted produce, an important sector of the market is that which caters to supermarkets, first-class hotels, the catering trade and the airlines.

Unlike Dubai, the supermarkets in Saudi Arabia buy direct from suppliers. They also use middlemen, but most of their purchases are done directly. These supermarkets receive weekly telexes and faxes from suppliers worldwide, notably Holland, France and USA, offering quantities and varieties of produce from all over the world. The supermarkets carry out a price analysis, i.e. comparing prices from different sources, prices of last week and price estimates of consumption in their stores. Following this, they fax an order through to the supplier and generally the produce is airfreighted within two or three days. They are accustomed to receiving fast and efficient service, a minimum of thirty days credit, and top quality fresh produce. For this they generally pay very high prices.

Names and addresses of some of the major supermarkets in Saudi Arabia are contained in Appendix C. As with most supermarkets, the ones in Jeddah tend to be extremely rigorous in their demands for quality produce and service and will reject produce if it does not meet those demands.

Two major suppliers to the supermarkets and hotels in Jeddah are Alajm Trading Est and Islam Commercial Enterprises (names and addresses are supplied in Appendix C) These importers mainly channel produce to the specialist outlets, but do have a good alternative market system in that they are able to channel rejected produce to those markets which would bring the best alternative prices.

These specialist importers, as in Dubai, are accustomed to receiving thirty days credit and usually pay by monthly statement - as do the supermarkets. Both groups could agree, however, to consider an initial goodwill placement of a letter of credit in the first few consignments. This would be a matter of negotiation for Kenyan exporters.

FRUIT

Fresh Mangoes

The major variety of mango available in the markets is the small sweet Alphonso variety which comes from India. There are also very small specialized markets for Kent, Haden and Sensation mangoes,

and a medium size market for the fruit because of its flavor and relatively low price.

In 1990, Saudi Arabia imported 5,556 tons of mangoes valued at US\$5,450,223 (*See Table 1*). This represents a decrease in volume of 29% and a decrease in value of 5% on the level imported in 1988. Major suppliers of the imported mangoes were Pakistan, India and Sudan.

For much of the year, mainly March through August, there is no real market for long distance imports of mangoes in the Middle East because of very cheap and reasonable quality mangoes coming from India and Pakistan. Despite the reduction in the level of imports, a niche still exists for airfreighted mangoes in the so-called off-season in September/October through February when some mangoes arrive from Kenya, South America, and South Africa.

TABLE 1: Fresh Mangoes

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Pakistan	1,948,507	2,347,257	1,069,016	593,236	1,862,631	868,002
India	1,218,615	1,250,738	1,715,590	1,201,948	2,003,931	1,843,263
Thailand	-	-	46,843	44,980	-	-
China Formosa	-	-	282,990	503,862	-	-
Egypt	72,257	58,551	96,346	46,936	-	-
Sudan	1,328,665	761,181	250,522	108,971	2,190,124	1,184,150
Nigeria	66,998	47,487	-	-	-	-
Somalia	351,796	215,563	167,950	97,365	-	-
Kenya	385,424	555,821	70,140	87,936	947,273	1,081,428
Australia	32,421	59,526	-	-	-	-
Others	152,314	154,098	100,968	107,072	860,763	785,203
Total	5,556,997	5,450,222	3,800,365	2,792,306	7,864,722	5,762,046

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Mango Juice

In 1990, 10,548 tons of mango and guava juice were imported into Saudi Arabia valued at US\$ 8,535,718 (*See Table 2*). This represents a decrease in volume of 21% and a decrease in value of 16% on the level imported in 1988. No separate statistics exist for mango juice alone. The main suppliers of mango and guava juice were India, Egypt and Cuba.

TABLE 2: Mango and Guava Juice

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Kuwait	149,442	105,331	924,968	449,493	250,4660	1,121,543
Bahrain	171,395	175,057	424,244	414,918	-	-
UAE	204,288	181,059	303,703	280,008	916,200	735,873
Pakistan	44,782	39,750	-	-	-	-
India	4,131,015	3,057,724	7,330,506	6,165,637	6,799,470	5,871,542
Egypt	3,444,726	3,387,933	3,112,659	2,738,217	2,652,933	2,054,413
USA	73,322	108,744	-	-	-	-
Cuba	1,388,239	776,791	-	-	-	-
Brazil	15,960	44,549	-	-	-	-
W Germany	37,480	70,441	108,226	84,863	-	-
Holland	379,554	271,233	-	-	-	-
Italy	266,677	139,046	-	-	-	-
Other Countries	241,749	178,060	151,883	85,823	477,821	372,248
Total	10,548,629	8,535,718	12,356,189	10,218,959	13,351,084	10,155,619

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Concentrated or Powdered Fruit and Vegetable Juices

There is a large market for concentrated or powdered fruit and vegetable juices in Saudi Arabia. In 1990 a total of 20,315 tons was imported valued at US\$33,409,405 (See Table 3). This represents an increase in volume and value of 2% on the level imported in 1988. The main suppliers of concentrated or powdered fruit and vegetable juices were the USA, Denmark and Holland.

TABLE 3: Fruit and Vegetable Juices, concentrated or powdered

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
All	20,315,867	33,409,405	19,093,337	28,953,100	19,848,382	32,821,834

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Fresh Strawberries

The major variety in the market is the Chandler variety, coming from California and Florida. It is believed that purchases are also made of Tioga, Selva and Senga Sengana hybrids.

In 1990, Saudi Arabia imported 1,038 tons of strawberries valued at US\$1,295,891 (See Table 4). The volume has increased by 19% since 1988 and the value has increased by 10%. Major suppliers of imported strawberries in 1990 were Spain, Egypt and the USA.

There is a steady specialized demand for strawberries by supermarkets, hotels, restaurants, the catering trade and the airlines. It is a small market yet the premium prices which can be attained for strawberries, particularly during the winter months, make it a lucrative and attractive market.

The US-style of packaging is preferred in the Middle East, rather than the European 250g or 125g punnet because the produce is sold loose in the supermarkets.

TABLE 4: Strawberries

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Egypt	172,185	113,700	58,974	51,511	-	-
Kenya	-	-	35,478	52,014	-	-
USA	123,484	257,776	84,145	186,430	-	-
Denmark	20,192	56,697	17,261	41,489	-	-
Holland	34,535	85,408	47,998	117,148	-	-
Italy	24,461	34,898	-	-	-	-
France	-	-	12,474	34,087	-	-
Turkey	98,026	42,410	182,262	86,703	-	-
Spain	370,143	531,202	637,597	852,704	319,653	415,700
Yugoslavia	20,000	27,954	-	-	-	-
Others	175,577	145,846	151,266	123,313	555,811	757,751
Total	1,038,603	1,295,891	1,227,455	1,545,399	875,464	1,173,451

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Passion fruit

Both purple and yellow varieties of passion fruit are present in the market, although the purple passion fruit has precedence. No separate statistics for passion fruit are available for Saudi Arabia. Imports of passion fruit would fall under the category of 'Other Fresh Fruit' (See Table 5) which has decreased in size from US\$4.01 million in 1988 to US\$1.20 million in 1990. Similarly, there are no separate statistics for passion fruit juice.

Avocados

The market for avocados is very small and specialized. Import statistics show that avocados have not been imported into Saudi Arabia in any volume since 1988 (See Table 6) and therefore existing demand is presumably being met by domestic production.

TABLE 5: Other Fresh Fruit

1990	W (Kg)	V (US\$)	W (Kg)	V (US\$)	W (Kg)	V (US\$)
	1990	1989	1989	1988 1988		
Philippines	13,937	34,323	-	-	-	-
Pakistan	-	-	421,211	176,631	1,158,121	562,548
India	-	-	844,922	601,385	1,070,349	1,096,476
Sri Lanka	-	-	28,448	40,528	-	-
Thailand	-	-	52,464	60,495	-	-
Indonesia	11,263	50,997	12,895	36,081	-	-
Egypt	-	-	55,060	35,030	-	-
Australia	72,319	169,609	158,585	348,104	195,041	411,979
New Zealand	122,000	139,492	117,393	202,503	162,229	334,819
USA	130,960	224,228	221,246	462,511	238,662	407,525
Holland	24,542	83,979	74,473	206,666	-	-
England	23,060	32,981	33,768	78,644	-	-
France	137,382	224,607	65,342	138,043	-	-
Italy	31,784	35,192	64,216	137,212	-	-
Others	244,336	209,081	98,894	129,945	1,141,319	1,201,340
Total	811,583	1,204,489	2,248,917	2,653,778	3,965,721	4,014,687

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

TABLE 6: Avocados

	W (Kg)	V (US\$)	W (Kg)	V (US\$)	W (Kg)	V (US\$)
	1990	1990	1989	1989	1988	1988
Different Countries	-	-	-	-	200,339	159,115
Total	-	-	-	-	200,339	159,115

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Frozen Fruit

In 1990, 531 tons of frozen fruit were imported into Saudi Arabia valued at US\$681,969 (See Table 7). The market has increased significantly since 1988, up 99% in volume and 111% in value. Spain was the largest supplier in 1990 followed by Turkey, Italy and the Dominican Republic.

TABLE 7: Frozen Fruit

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
India	-	-	44,000	39,738	-	-
Egypt	-	-	44,791	26,781	-	-
Holland	-	-	30,260	35,772	-	-
Dominican Rep	19,000	28,343	-	-	-	-
Italy	21,000	28,672	-	-	-	-
Turkey	52,624	42,417	69,736	44,402	-	-
Spain	368,751	490,653	-	-	-	-
Others	70,225	91,884	7,586	17,124	266,649	322,446
Total	531,600	681,969	196,373	163,817	266,649	322,446

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

VEGETABLES

The bulk of vegetables in the Middle East come either from domestic supplies or from nearby countries. In fact, some of the large importers who had previously imported fruit and vegetables have ceased importing vegetables because of the availability of good quality and low cost domestic produce.

The local season is normally December through June/July and at that time there is very little imported produce from distant sources. In the off-season, vegetables are received by air from Holland, France, and by reefer container from Australia. In most cases these are orders for specialized produce, especially salad items.

Mangetout

No separate statistics are available for mangetout in Saudi Arabia. The market is small and very specialized, mainly limited to supermarkets and first-class hotels. Mangetout from Guatemala and Zimbabwe is very often sourced via the Netherlands. Kenyan, Australian and Spanish mangetout are all available in the Saudi market.

Cherry Tomatoes

Similar to mangetout, there is a small specialized demand for cherry tomatoes from supermarkets and hotels. They are mainly sold loose.

No separate statistics are available but the total fresh tomato market in Saudi Arabia has increased by over 25% in both volume and value since 1988 (See Table 8). Cherry tomatoes from the USA,

TABLE 8: Fresh Tomatoes

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Syria	9,561,328	3,902,798	1,824,663	419,715	1,116,217	391,913
Lebanon	1,512,710	293,599	581,209	91,507	-	-
Jordan	110,560,399	17,854,857	90,769,790	14,610,186	42,777,281	7,314,187
Oman Musquat	-	-	89,984	31,968	-	-
UAE	-	-	205,169	78,568	-	-
Tunisia	-	-	293,635	50,470	-	-
Egypt	14,429,948	3,452,311	8,136,412	1,632,025	9,361,508	2,233,142
Holland	18,546	60,874	73,173	79,569	-	-
Italy	36,914	30,470	-	-	-	-
Turkey	19,606,623	3,187,615	40,939,265	6,512,240	65,497,518	10,222,933
Others	438,340	116,294	180,184	65,501	3,973,108	1,103,609
Total	156,164,808	28,898,818	143,093,484	23,571,751	122,725,632	21,265,784

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Asparagus

The market for asparagus is similar to that for cherry tomatoes and mangetout, namely small and specialized. No statistics for fresh asparagus are recorded for the years 1988-1990. However, in 1989, 38 tons of prepared or preserved asparagus was imported into Saudi Arabia valued at US\$94,586 (See Table 9). This was supplied mainly by Spain and China. It is impossible to say whether this is a growing market as no statistics are recorded for 1988 and 1990.

TABLE 9: Asparagus, prepared or preserved otherwise than by vinegar or acetic acid

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
China Formosa	-	-	12,354	31,006	-	-
Spain	-	-	19,760	42,072	-	-
Other countries	-	-	6,165	21,508	-	-
Total	-	-	38,279	94,586	-	-

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Fine Beans & Bobby Beans

No separate statistics are available. In 1990, Saudi Arabia imported 427 tons of fresh Fava beans

(green) valued at US\$182,298 (See Table 10) and 3,251 tons of fresh haricot and string beans valued at US\$4,501,931 (See Table 11). The fava bean market has grown in volume by 7% and value by 27% since 1988 but the haricot and string bean market has decreased by approximately 32%.

TABLE 10: Fresh Fava Beans (green)

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
China	133,392	73,201	-	-	-	-
Canada	-	-	400,000	149,833	-	-
Italy	74,170	32,804	-	-	-	-
Different Countries	220,258	76,293	431,123	129,579	401,665	143,413
Total	427,820	182,298	831,123	279,412	401,665	143,413

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

TABLE 11: Fresh Haricot Beans and String Beans

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Syria	67,245	30,159	-	-	-	-
Lebanon	-	-	424,352	79,542	-	-
Jordan	1,723,143	278,387	2,816,420	470,460	2,108,180	397,178
Thailand	-	-	210,481	123,605	-	-
India	90,050	35,756	-	-	-	-
China	87,951	50,884	-	-	-	-
Indonesia	48,461	30,825	-	-	-	-
Egypt	365,001	159,429	-	-	-	-
USA	-	-	78,918	44,930	-	-
Canada	-	-	42,176	34,911	-	-
Denmark	18,580	38,457	32,827	62,231	-	-
Holland	49,661	32,940	34,507	38,842	-	-
Belgium	49,532	44,683	237,814	151,980	-	-
England	161,598	92,200	-	-	-	-

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia
(Continued on next page)

TABLE 11: Fresh Haricot Beans and String Beans Continued ...

Italy	74,496	28,868	-	-	-	-
Turkey	86,778	29,137	246,023	38,885	-	-
Hungary	62,776	34,512	-	-	-	-
Bulgaria	86,400	33,972	156,342	59,465	-	-
Others	280,197	148,229	202,071	98,559	2,646,088	1,147,766
Total	3,251,869	1,068,438	4,501,931	1,203,410	4,754,268	1,544,944

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Chilies

No separate statistics are available for chilies although there is a steady off-season demand. Most chilies are supplied via France and the Netherlands.

Okra

The market for imported fresh okra has decreased significantly in Saudi Arabia (See Table 12). In 1990, 906 tons were imported valued at US\$358,802. This represents a decrease in volume of 59% and a decrease in value of 84%. The main suppliers were Egypt, Aden and Jordan.

TABLE 12: Fresh Okra

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Jordan	154,167	27,704	-	-	-	-
Yemen	-	-	601,353	133,624	1,269,315	668,884
Aden	177,282	76,556	265,740	102,413	-	-
India	93,655	56,687	-	-	463,105	334,760
Egypt	269,407	146,568	-	-	-	-
Others	211,847	51,286	223,837	81,875	500,382	230,819
Total	906,358	358,802	1,090,930	317,912	2,232,802	1,234,463

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

Frozen Vegetables

There are no separate statistics for individual frozen products. In 1990, 8,364 tons of frozen

vegetables were imported into Saudi Arabia valued at US\$7,810,410 (*See Table 13*). Since 1988, the market has increased in volume by 40% and increased in valued by 29%.

TABLE 13: Frozen Vegetables

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
China Formosa	25,000	28,866	-	-	-	-
South Korea	79,680	33,793	-	-	-	-
Egypt	2,039,228	1,490,863	3,208,275	2,182,448	2,122,511	1,756,214
New Zealand	54,360	62,224	36,000	48,045	-	-
USA	763,456	961,403	727,843	633,482	447,335	448,500
Canada	38,035	95,125	-	-	-	-
Denmark	128,980	175,660	126,683	185,849	184,923	540,377
W Germany	31,192	68,257	236,378	199,671	-	-
Holland	2,470,879	2,146,478	655,592	565,700	436,268	347,691
Belgium	448,797	454,877	1,004,412	872,445	752,510	631,824
England	453,502	855,974	782,629	1,003,698	831,708	1,519,166
France	185,167	147,111	41,800	38,979	-	-
Italy	-	-	190,050	59,619	-	-
Turkey	710,189	526,254	354,935	206,712	435,237	285,586
Hungary	847,636	676,539	63,650	42,168	-	-
Bulgaria	-	-	30,748	36,512	-	-
Yugoslavia	38,410	35,096	-	-	-	-
Other Countries	49,781	51,890	65,410	67,082	743,842	530,181
Total	8,364,292	7,810,410	7,524,405	6,142,410	5,954,334	6,059,539

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

CUT FLOWERS

In 1990, the market for imported cut flowers and buds in Saudi Arabia was 788 tons valued at US\$2,812,420 (See Table 14). This has decreased in volume by 51% since 1988 and by 37% in value as a result of the Government's drive to increase domestic production. Main suppliers of imported flowers were Holland, Iraq and the Yemen. Kenya had a presence in the market in 1989 but did not feature in 1990.

TABLE 14: Cut Flowers and Buds

	W (Kg) 1990	V (US\$) 1990	W (Kg) 1989	V (US\$) 1989	W (Kg) 1988	V (US\$) 1988
Iraq	203,065	113,884	181,845	128,875	-	-
Yemen	134,388	873,686	123,292	742,739	136,060	600,579
India	71,539	117,826	142,539	153,811	-	-
Egypt	19,100	37,259	40,766	128,410	-	-
Indonesia	-	-	58,200	64,330	-	-
W Germany	7,099	40,357	3,786	27,397	-	-
Holland	260,766	1,153,717	385,855	1,775,592	797,839	2,062,620
Kenya	-	-	5,403	49,891	-	-
USA	-	-	9,059	118,340	48,589	637,842
Belgium	23,859	208,386	18,812	62,948	-	-
France	7,201	52,081	13,543	63,848	-	-
Iceland	1,600	29,814	-	-	-	-
Cyprus	-	-	13,756	36,985	-	-
Others	59,586	185,410	76,469	151,020	641,535	1,161,887
Total	788,203	2,812,420	1,073,325	3,504,186	1,624,023	4,462,928

Source: Central Department of Statistics, Government of the Kingdom of Saudi Arabia

NOTE ON SAUDI MARKET: Very little information apart from cumbersome data was available in London on this relatively important market. Given its geographical location, further field research may be necessary.

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Appendix A

REPRESENTATIVE LIST OF BAHRAIN IMPORTERS

Al Qatary for Fruit and Vegetables Box 20242 Tel: 274142 Fax: 276008	Abdulla Habib Abdulnabi Shop 76, Al Zora Bed, Bldg. 14, Bldg. 51, Central Market Avenue, Manama 314 Tel: 275055 Fax: 271806 Telex: 9615 HHH BN
Nadar & Ebrahim S/O Hassan Co. (WLL) Box 20070 Tel: 241207 Fax: 233405 Telex: 9216 BTISAM BN	Abu Ahmed Vegetables & Fruits Store Box 20161 Tel: 742955 Fax: 715234
Abbas Mohd Ali Al-Saffar (Stores) Tel: 233885 S. Nasser S. Hamza A. Sharaf Box 20122 Tel: 257110	Ahmed Ali Al-Sediqi Box 26201 Tel: 700931
Abbas Abdulkarim Ali Hassan Box 2468 Tel: 251820	Alawi Sayed Ebrahim Alawi Box 30417 Tel: 690264
Abdul Ameer Al-Araibi Vegetables Box 32320 Tel: 641642	Al-Bayan Fruits & Vegetables Box 396 Tel: 257480 Fax: 276943 Telex: 8341 SHICCO BN
Abdul Jalil Essa Al-Khor Box 20187 Tel: 253843 Fax: 241076 Telex: 9514 AEK BN	Al Dana Fruits & Vegetables Center Box 2468 Tel: 251820/276986
Abdul Redha Ali Abdul Rasool Darwis Box 20125 Tel: 272735	Al-Khoor Trading Col Box 20187 Tel: 253843 Fax: 241076 Telex: 9514 AEK BN

Al-Khunaizi Foodstuffs Est
Box 20104
Tel: 256709

Vegetable Centre
Box 20298
Tel: 257677

Al-Rasalah Trading Co.
Box 20187
Tel: 231884/253843

Zahra Yar Mohammed
Shop 133, Road 635, Ma'ama 306
Tel: 713660

Al-Qatary Fruits & Vegetables
Box 20242
Tel: 274142/277260

Ali Juma Ali Mahmeed
Box 22099
Tel: 330460

Baqer Sayed Mohsin Sayed Naama Al-A'Aal
Box 111032
Tel: 241227
Telex: 9009 RED BN

Bu Bader fruits & Vegetables Merchants
Shop 314, Road 907, Riffa
Tel: 666140

Delmon Fish
Box 947
Tel: 246348/271081/263588

Fancy Crafts
Box 22057
Tel: 263535

Hassan Habib Abdulnabi Khalaf
Box 309
Tel: 275055
Fax: 271806

Mohammed Ali Mohammed Hassan Al-Daif
Tel: 631267/756334

Tiger Vegetables & Fruits Importers
Box 30037
Tel: 694563/691820

Appendix B

REPRESENTATIVE LIST OF UNITED ARAB EMIRATES IMPORTERS

Abbar & Zainy Annex

P.O. Box 6066

SHARJAH

U.A.E.

Tel: (Dubai) 665543

(Sharjah) 332793/94/95

Tlx: 68609 FRUTTA EM

Contact: Dr. Claudio Covezzi

Greenhouse Supermarket

P.O. Box 5927

Sharjah

U.A.E.

Tel: 9716 592218/9/591095

Tlx: 68441 GREENS EM

Contact: Petros Hadjipetrou, Manager

Farzana

Head Office: Central Veget. Market

P.O. Box 5188

Hamria

Dubai

U.A.E.

Tel: 662254/663075/660415/692815/661745

Tlx: 46092 FARZN EM

Fax: 692761

Contact: Mohamad Hassan Ali

Managing Director

Sandrilla Trading Company

P.O. Box 6928

Deira

Dubai

U.A.E.

Tel: 669078, 660758, 669077

Tlx: 48891 EM Fax: 661769

Contact: Abdullah Larry

Khamas Trading Company

P.O. Box 1375

Dubai

U.A.E.

Tel: 663411, 695906, 663022 Tlx: 46886

KAMAS EM

Contact: Abdul Karim

Kibsons International

P.O. Box 5313

Dubai

U.A.E.

Tel: 694559/222872

Tlx: 48026 IBSON EM

Contact: Ashok Ghandi

Manager

Jordanian Gulf Gen. Trdg. Co.

P.O. Box 13475

Dubai

U.A.E.

Tel: 660026, 695441, 694764

Tlx: 46414 NASER EM

fax: 662634

Contact: Neddal A. Agroug

Public Relations Manager

Barakat - Vegetables & Fruit

P.O. Box 11286

Deira

Dubai

U.A.E.

Tel: 662584/661768

Tlx: 45903 BARKAT EM

Fax: 691522

Contact: JAYARAMAN

General Manager

Iran Dubai Company
P.O. Box 1308
Hamriya Market
Dubai
U.A.E.
Tel: 667460, 662651, 664313
Tlx: 46147 FRESH EM
Contact: Ali Mohd. Arjomandi, Managing
Director

Gulf Express Freight
P.O. Box 2779
Dubai
U.A.E.
Tel: 457725
Tlx: 48939 GEF EM
Fax: 457202
Contact: Issa Baluch, General Manager

Dubai Chamber of Commerce & Industry
P.O. Box 1457
Dubai
U.A.E.
Tel: 224651, 221181, 221327
Tlx: 45997 EM
Telefax: 211646
Contact: Abdul Rahman G. Al Mutaiwee,
Director General

Appendix C

REPRESENTATIVE LIST OF SAUDI IMPORTERS

- Abbar & Zainy Cold Stores
P.O. Box 2495
Jeddah
Saudi Arabia
Tel: 6371315/6379076
Tlx: 601728 FRUTTA SJ
Fax: 6373012
Contact: Alessandro Mondin
- Mahammed Abdallah Sharbatly Corporation
Al-Safa District 11
N25 E Street
Abdallah Al-Sharbatly Street (2053)
P.O. Box 4150
Jeddah 21491
Saudi Arabia
Tel: 6910052 (4 lines)
Tlx: 603491 ELHANY SJ
605186 ELSAYD SJ
Fax: (02) 6910103
Contact: Emilio Renzi
Asst. Managing Director
- Arabian Trading Company
P.O. Box 1393
Jeddah
Saudi Arabia
Tel: 6364262/6371239
Tlx: 601065 RIJJAL SJ
Fax: 6363687
Contact: Abdul Aal A. Awad
Commercial Manager
- Al Nakheel - Mohammed Odai
P.O. Box 8546
Jeddah
Saudi Arabia
Tel: 6727321
Tlx: 400652 Hilali / 604107
Contact: Zamil Al-Raddady & Co. (no English)
Wasif Mahmood (some English)
(Tel: 6728527)
- Sahaim S. Ghandi Est.
P.O. Box 8546
Jeddah
Saudi Arabia
Tel: 6727321, 6728527
Tlx: 604107 SHILYA
- Jadallah Atiyah Al-Hijaili Est.
P.O. Box 3918 (21481)
Jeddah
Saudi Arabia
Tel: 6715213, 6719707, 6710230
Tlx: 601265 JAD SJ
- Adel J. Qurashi Est.
P.O. Box 6199
Jeddah 21442
Saudi Arabia
Tel: 6723385/6723779
Tlx: 402504 HALAGA SJ
Contact: A.J. Al-Qurashi

Group 4 Ltd
P.O. Box 12154
Al Andalus St
Jeddah 21473
Saudi Arabia
Tel: 6513364/6513360
Tlx: 602344 GIFOR SJ
Fax: 02 651 4640
Contact: John J. Hobeika
Deputy General Manager

Ibrahim A. Rahman
Islam Commercial Enterprises
P.O. Box 488
Jeddah-21411
Saudi Arabia
Tel: (02) 6474741/6481633
Riyad Branch (01) 4030124
Tlx: 601652 ISLAM
Fax: (02) 6475124

Tamimi & Fouad & Al Emam Food Co. Ltd.
P.O. Box 5636
Jeddah 21432
Kingdom of Saudi Arabia
Tel: 6690118/6690122
Tlx: 603846 SAFWAY SJ
Fax: 6606968
Contact: Gerry Cooley
Operations Manager
Ahmad M. Serry
Merchandising - Wholesale Manager

Arabian Stores Co. Ltd.
(Sarawat Superstores)
P.O. Box 5967
Jeddah-21432
Saudi Arabia
Tel: 6478038/6478373/6481286
Tlx: 600795 ASMOB SJ
Fax: 6476146
Contact: Richard Lester
Merchandising Manager

Alajm Trading Est.
P.O. Box 16560
Jeddah-21474
Saudi Arabia
Tel: 6423443, 6429442, 6433045
Tlx: 605559 FWAKEH SJ
Contact: Ahmed H. Kapadia