



ACCESS TO THE GCC FRUITS AND VEGETABLES MARKET

The Jordanian production of fruits and vegetables is considerable, estimated at almost 3 million tons annually, with existing market opportunities for expansion. Recent domestic and regional consumer trends show more and more appreciation and potential for high quality, healthy fresh produce and added value (convenience) products. The main export destinations are in the region as GCC countries continue to represent the most important market.

The Jordan Hydroponic Agriculture and Employment Development Project (HAED-Jo) supports farmers and exporters with market development, covering both domestic and export markets. Next to supporting Jordanian farmers with adopting innovation technology, knowledge transfer and post-harvest value chains, HAED-Jo also builds market intelligence and forges linkages with national and international markets.

Farmers and exporters are also supported in gaining that market knowledge, in developing their market strategy and action plans (either for individual businesses or for groups) and through study visits and business orientation tours to selected markets.

GCC: THE JORDANIAN NATURAL EXPORT MARKET - CHARACTERISTICS AND REQUIREMENTS

The key requirements have to do with high and consistent quality, competitive pricing and clear supply calendars. The GCC requires more and more food safety and requirements, mainly initiated by governments, but taken over rapidly by consumers and retailers.

CONSUMERS IN GCC MARKETS VALUE

Convenience of the product itself and its packaging

Fresh looking products

Promotional items

LOCAL AND INTERNATIONAL RETAIL CHAINS AND FOOD SERVICES IN THE GCC REQUIRE:

01

Prompt logistics

02

Quick communications with their local or international supplier

03

Competitive prices for commercial crops and regular prices in niche and seasonal products

THE GCC FOOD LAWS PRIORITIZE FOOD SAFETY:

Maximum Residue Levels (MRLs)

Phytosanitary and Microbial requirements

Authorized certificates of origin and packing list

Quality, maturity, sizes and tolerance: general and specific marketing standards set by municipalities or cities

PESTICIDE CONTROL IN GCC MARKETS

Exporters need to deliver lab analysis reports of products before shipping, done by an accredited laboratory (ISO 17025 certified)

PACKAGING:

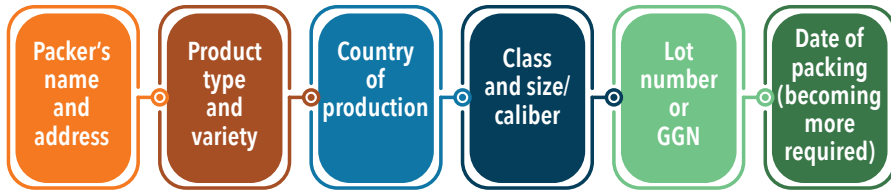
Packaging material must protect the product against contamination, leakage and dehydration **01**

Packaging material must secure products **02**

Wholesales prefer matching weight and count in the packs and on the pallet **03**

Retailers prefer standard weight packs for their inventory, consistent along the season or year **04**

LABELLING REQUIREMENTS:



GCC PRIVATE SECTOR REQUIREMENTS



For primary produce
GLOBAL G.A.P,
HACCP or
specific,
additional
requirements



For processed
produce Good
Manufacturing
Practices:
schemes based
on HACCP and
ISO 22000:
mainly BRC or
IFS, but also
other schemes,
such as (SQF),
FSSC 22000

GCC: SEASONAL IMPORT CALENDAR AND MARKETING WINDOWS

Crop	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec
Apples												
Stone Fruits												
Berries												
Cherries												
Melons												
Bananas												
Potatoes												
Tomatoes												
Cucumber												
Cabbage												
Carrots												
Herbs												
Other Vegetables												

Seasonal import calendar of fruits in GCC (orange = peak months)

CROPS AND POTENTIAL MARKET WINDOWS & COMPETITORS



Strawberries

- Import Window: **All year round**
- Competition: **Egypt, USA, Turkey and Spain**



Capsicum

- Import Window: **Summer (June-August)**
- Competition: **Europe, Turkey and Iran**



Tomatoes

- Import Window: **All year round**
- Competition: **Netherlands and local production**



Fresh herbs

- Import Window: **July - November**
- Competition: **Europe and local production**



Lettuce

- Import Window: **December - March**
- Competition: **Spain, Iran, Turkey, Lebanon and local production**

GCC: DIFFERENCES IN CONSUMER BEHAVIOUR, SPENDING POWER AND BUSINESS PRACTICES



+ Saudi Arabia (34 million consumers)

- Largest consumer market in the GCC
- Medium purchasing power
- Large and dominant retailers (at least 12) with high quality and food safety standards
- 2 main land ports (Jordan and Kuwait/ UAE/ Qatar)

+ United Arab Emirates (10 million)

- Largest trading market in the GCC
- Large and dominant retail chains (at least 5) with high quality and food safety standards
- 2 main land ports (Saudi Arabia and Oman)

+ Kuwait (4.7 million)

- Large malls and dominant retail chains (at least 3) with high quality and food safety standards
- 2 main land borders (Saudi Arabia and Iraq)
- 1 main airport (Kuwait City)

+ Qatar (2.8 million)

- High purchasing power
- 3 active retail chains
- Good prices for niche products
- One main land border (Saudi Arabia)

+ Bahrain (1.2 million)

- Lower fruit and vegetable consumption rates
- 1 airport and 1 land border with Dammam

+ Oman (5 million)

- Medium to high purchasing power
- Secured money for traders
- Medium to large and dominant retail chains (at least 3) with high quality and food safety standards
- 1 main land border (UAE)