



إتحاد جمعيات المزارعين الفلسطينيين
The Palestinian Farmers Union (PFU)



Anti-dumping Case Studies
in the Palestinian Market

Case Study 8

DRY MILK

PALESTINE

September 2021



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Background and justification

With the outbreak of Corona disease and the declaration of a state of emergency on the sixth of March of the year 2020 by the Palestinian Government, many economic problems have emerged in various productive sectors, whether industrial or agricultural. However, perhaps the most prominent of which; is the losses that the cow farmers and dairy products sectors are exposed to, as they are exposed to losses estimated by millions of dollars as a result of market closures for a period of more than three months or continuous weekly closures, which affected the market's ability to sell milk products. The failure of many factories to absorb milk from cow farms as a result of slow production and marketing exposed many of these farms to losses as a result of their need for daily expenses to purchase feed in addition to other operating expenses.

The fresh milk crisis also exacerbated, especially in the northern West Bank, as many small factory owners replaced fresh milk with powdered milk, which led to the accumulation of surplus quantities of fresh milk and their accumulation among farmers, as the closure of sweets shops and factories that used to consume an average of 200 Tons per day has stopped buying milk from small farmers, which led to the accumulation of milk quantities, as well as those factories began to introduce powdered milk in manufacturing, since the control over them is not at the same level of major factories.

On the other hand, these farms suffer from variations in the selling prices of raw fresh milk, 2.4-2.8 shekels at the latest, while the price of a kilo of powdered milk reaches 0.5 shekels. Moreover, another problem has recently emerged that is as important as the previous problems, which is Dairy companies resort to increasing their reliance on powdered (dried) milk, that is entered from the Israeli market as an alternative to fresh milk.

This study aims to deliver a message to the relevant government agencies on the issue of powdered milk and its effects on Palestinian farmers, especially small farmers.

In this paper, we will try to answer the following questions related to the situation of overflowing powdered milk in the Palestinian market: -

- What are the justifications for writing about this topic, why do we write on this topic?
- What is the main message/issue of the case study?
- How can the case study address the existing problem?
- What are the consequences of this situation on the farmers, what is the impact that the subject of the study can have, does this not lead to devastating results on the farmers?

Introduction

The dairy products industry is one of the old traditional industries in Palestine, which is still associated with what is known as the home economy, as it constituted an important part of the household needs that are provided at the home level, and many Palestinian families still depend on it as a main source of income. This industry continued to develop since the eighties of the last century through dairy factories.

The value of sales of milk products, according to the Palestinian Milk Council, is approximately 420 million shekels annually.

The quantity of liquid milk is considered one of the most important basic inputs in the dairy products industry in Palestine, as it is considered a raw material in the manufacture of milk and its derivatives. As the daily production of milk reaches 460,000 liters, with a total of 167,000 tons of milk annually. In other estimates, up to 189,000 tons from all farms in the West Bank provides 85% of the Palestinian market need of milk and its products of white cheese, yogurt and labneh, and this percentage decreases if we add other products such as yellow cheese, kashkaval and mozzarella because these products are not manufactured in Palestinian factories. Although there are attempts to produce mozzarella.

Palestinian factories produce an average of 450 tons of dairy products daily, while the market needs 550 tons of dairy products.¹

The average annual consumption of milk per person is 71 liters.

The dairy sector employs nearly a thousand workers in addition to thousands who work on small farms and also in the home economy associated with the manufacture of milk and cheese in homes.

The purpose of the study is to examine the flooding of the Palestinian market with powdered milk, because of this fact and its impact on fresh milk farmers and producers in the Palestinian market.

It also has a bad economic impact on farmers who supply fresh milk to factories, and consequently the inability of these factories to absorb quantities of milk, which sometimes leads to the farmer having to sell it at prices much lower than the cost because of the needs to cover the farm's operating expenses of feed and production inputs.

Objective of the study

This study, implemented by Human Resources and Development Company (HR&D) for the benefit of the Palestinian Farmers Association Union (PFU) studies the most important challenges facing Palestinian fresh milk farms, especially flooding the local market with powdered milk and working to solve it in order to support farms and the national economy, in addition to supporting the Palestinian product and mechanisms to put an end to flooding the market with powdered milk, and one of the objectives of the study is also to suggest recommendations to encourage the consumption of Palestinian milk.

The study also aims to develop a fact sheet with the aim of the Palestinian government adopting a policy to protect the market from flooding powdered milk, especially in light of the availability of abundant quantities of milk in order to protect the farms.

Importance of the study

This study is one of the studies specialized in examining the reality of the effect of using powdered milk on fresh milk industries, in order to ensure the ability to continue providing milk products and its derivatives to the Palestinian consumer on one hand, and researching the mechanism of protecting Palestinian farmers from flooding the market with competing products and reducing dependence on Israeli products on the other hand.

The Farmers Union will work with government agencies to reduce the competition of powdered milk for fresh milk, and thus achieve national self-sufficiency and food security, through an effective dialogue with the Palestinian government to adopt the study.



1 An interview with Bassam Abu Ghalioun, director of the Federation of Food Industries

Targeted segments

During the study, a group of stakeholders working in the milk sector and the manufacture of dairy products was targeted, with the aim of being guided by their role and contribution, this group included: The Ministry of National Economy, the General Federation of Food Industries, the Consumer Protection Association, the Palestinian Milk Council, experts in dairy processing, farmers.

Milk Paper Summary

Read figures related to fresh milk

Statistics	Fresh cow/goat milk	Notes
Annual milk production quantity bovine, sheep	172,000 tons per year 55% cow's milk up to 95,000 tons ²	The production of the Hebron governorate is up to 25%, the concentration of the Al-Junaidi and Al-Jebrini factories in the governorate. Al-Junaidi has 3 farms in Hebron in addition to a fourth farm in Jericho. The number of cows reaches 4000, while Al-Jebrini has 3000 heads.
Annual demand for dairy products	189,000 Tons	Fresh milk products, white cheese, milk, labneh.
Annual per capita milk	71 liters of milk	Fresh milk products, white cheese, milk, labneh.
Average per capita monthly spending on dairy products	18 shekels	
Percentage coverage of Palestinian farms of fresh milk	80-90% of the market need of fresh milk	
Average daily production of milk products	450 tons	
The average daily consumption of dairy products is up to	550 Tons	
A daily deficit of up to	100 Tons	The deficit in products that Arab factories do not produce, such as yellow cheese and cream, and is compensated by either the Israeli or the importer.
The number of dairy factories licensed by the Ministry of Economy	14-18 factories	

Statistics	Fresh cow/goat milk	Notes
The number of dairy workshops	50 workshops	It needs qualification and licenses, but it works in the market.
The volume of investment in the dairy industry sector	200 million dollars	
The amount of investment in cow farms	450 million dollars ³	
Number of workers in dairy factories	20004	Thousands of workers are also added within families in the unorganized sector in the manufacture of dairy products in homes and homes.
The number of cows in the northern provinces	25612	Cattle Survey 2013.
The number of cow farmers	1200 farmers	Of them, 750 are small farmers.
Annual fresh milk production value	110 million dollars	
Annual production value of dairy factories	450 million dollars	
Average price per liter of cow's milk sold to factories	2.4-2.8 shekel/litter	
Industrial Low Fat Annual Cotta Milk Powder ⁵	600 Tons	It is imported within the quota of Israel, where 20% for the Palestinians, compared to 80% for Israel Low-fat milk used in confectionery factories, wafers, ice cream, puddings and sweeteners. Packing in bags of 50 kg
Commercial Full Fat Cotta Milk	1400 Tons	It is not used in the manufacture of infant formula.

3 Kamel Mujahid Palestinian Milk Council

4 MAS develops competitiveness and increases the share of the national product in the Palestinian food industries sector 2019

5 From an interview with Manal Desouki, Director of the Import Department, Palestinian Ministry of National Economy

Summary of the quota for formula milk for 3 years 2019-2021

Company Name	2019		2020		2021	
	Declaration Quantity	License Amount	Declaration Quantity	License Amount	prepared Quantity	License Amount
Dairy factories						
Al Jebrini	100 Tons	100 Tons	100 Tons	100 Tons	50 Tons	50 Tons
Hamouda for industry	100 Tons	100 Tons	100 Tons	100 Tons	200 Tons	200 Tons
Ice cream factories						
Al Arz	330 Tons	330 Tons	242 Tons	242 Tons	154 Tons	154 Tons
Chocolate factories						
Sonokrot	100 Tons	100 Tons	200 Tons	200 Tons	200 Tons	200 Tons
El Hajjar Chocolate	25 Tons	25 Tons	25 Tons	25 Tons	40 Tons	
Abu Khorsik	-----	-----	-----	-----	70 Tons	
Total	665 Tons	665 Tons	653 Tons	467 Tons	714 Tons	604 Tons

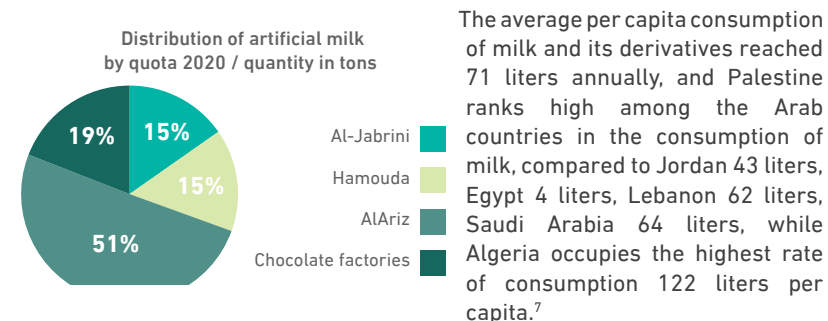
*The quantity of the declaration means the quantity imported from the customs declarations/ Customs data to be delivered by the end of 2021

Distribution of industrial milk quota by industry 2020



The reality of Palestinian milk

The annual demand for dairy products reaches 189,000⁶ tons, and sometimes the numbers reach 200,000 tons. The number of cows producing milk reached 25,612 in the northern governorates, and the value of milk production reached 208 million shekels, according to the 2013 census survey.



Palestinian dairy factories cover the market's need of yogurt, labneh, and cheese, in addition to yellow (table) cheese, kashkaval cheese, and mozzarella.

Cow's milk value chain

As for the value chain and markets for the dairy products sector for cow's milk, this sector usually includes two types of markets: -

- The traditional, which includes small and medium farmers, whose number is more than 750 farmers, according to the data of the Central Statistics. These farmers usually sell their products to dairy factories and dairy factories spread in the West Bank. Up to 55,000 tons are sold to factories, some of which are manufactured and sold by farms as dairy products and derivatives.
- Industrial, which is one of the total of 18 factories that absorb the quantities of milk from small cow farmers in addition to purchasing from more than 100 large farmers, in addition to some of these companies such as Al-Junaidi and Al-Jebrini. Currently, Al-Binar Company has its own farms that also produce milk.
- The relationship and its regulation between small farmers and dairy factories is one of the major challenges facing small farmers in discharging the quantities of milk produced and ensuring their continuity in this sector.

⁶ DAI 2011 A Roadmap for Agribusiness Development in the Occupied Palestinian Territories
⁷ <https://www.youtube.com/channel/UC7nD6M3vwJyn2SRgRElileQ>

Estimated production quantities of milk

According to the Ministry of Agriculture, milk produced from livestock of various kinds in Palestine in 2011 was estimated at about 171 thousand tons, compared to the production of 2010 estimated at 200 thousand tons, which constitutes 29.5% of the total livestock production in Palestine. It was valued at \$158 million, in addition to an annual increase of (9%) over previous years. Moreover, Cow's milk accounted for 56% of the total milk production in Palestine.

Dairy manufacturers use nearly 60 percent of domestic raw milk, which acts as a win-win strategy for both livestock owners and dairy manufacturers. Reliance on local raw milk instead of imported milk has helped dairy companies grow in size and numbers. The dairy sub-sector is growing to meet the needs of the local market as nearly 100% of its products pour into the local market, which represents about 80-85% of local consumption; The dairy industry is likely to maintain its focus on local markets in the near term as it is affected by transportation impediments caused by Israeli measures as well as difficulties in maintaining the cold chain.

The dairy sector serves two markets through which milk and its derivatives are marketed:

- The first market: production at the farmer's own level through the manufacture of milk and its derivatives and sale through a network of contacts and others.
- The second market: selling fresh milk to dairy factories.

Comparison of milk production to consumption

The data of the Palestinian Milk Council indicate that the Palestinian individual's share of milk annually amounts to 71 liters, and according to Mr. Kamel Mujahid, head of the Milk Council, the daily production of milk reaches 460,000 liters of milk, equivalent to 167,900,000 tons annually.

The attached table below shows the average monthly consumption of some dairy products and their derivatives according to the average monthly expenditure of the Palestinian family for the year 2011.⁸

Commodity	Quantity/month	unit
Fresh/ sterilized milk	4.807	Liter
Yoghurt cans	3.376	Liter
Buttermilk	0.162	Liter
Labneh cans	0.304	Liter
Soft white cheese	0.788	Kg
Boiled white cheese	0.056	Kg
Yellow cheese	0.377	Kg

Fresh milk processing

The dairy products industry can be defined as any industry in which milk is used as a raw and basic material in production, where fermented milk is one of the important products of milk. These varieties are varied and numerous, and include yoghurt, yogurt, cheese, labneh, buttermilk, cream milk, etc.

14-19 dairy factories work in the manufacture of dairy and its derivatives, accommodating approximately 230 tons per day from cow farms, and the rest is also manufactured through dairy factories and through the farmers themselves.

Cow farmers depend on factories and workshops to supply raw milk to these factories. The owners of milk farms in the West Bank usually market their products to dairy production factories, sweet shops, and workers in the field of cheese manufacturing, and these sectors used to absorb the entire milk production in the West Bank.

But in light of the emergency, this sector faced great losses, as factories reduced their production capacity by half, or less than half, and sweet shops were closed during the crisis.

The market share of dairy products increased from 45.8% in 2007 to 57% in 2017⁹, while the production value of those factories reached 110 million dollars.¹⁰

The percentage of dependence on dairy products imported from Israel decreased from 97.6% in 2007 to 88% in 2017.

The approximate table of the distribution of dairy processing by factories Distributed as follows:

Factory	Daily production rate	Notes
Al juned	200 Tons	Market share 30%
Al Jebrini	110-120	26%
Candia	100 Tons	22%
Hamouda	15 Tons	3%
Al Pinar	10 Tons	2%
Al Safa	5 Tons	Currently paused
Arab construction project	2 Tons	

⁹ MAS develops competitiveness and increases the share of the national product in the Palestinian food industries sector 2019

¹⁰ MAS develops competitiveness and increases the share of the national product in the Palestinian food industries sector 2019

The most important items produced by Arab factories include:

Item	Notes
Yogurt	2% is allowed to be added from powdered milk, but there is nothing written on the box that indicates the use of powdered milk
Buttermilk	
Labaneh	cans, nylon
fresh pasteurized milk	Plastic bottles, Tetra Pak cartons
UHF milk	
Flavored milk	Vanilla, chocolate
White cheese	Plastic cans
Mozzarella cheese	
kashkaval	
Chiment	2% powdered milk is allowed
Sweeteners and puddings	2% powdered milk is allowed

The volume of investment in the dairy sector

Estimates of the volume of investment in the sector amount to about 2.0 billion shekels¹¹, distributed between 700 million shekels, investment in dairy factories and 1.3 billion shekels in cow farms. The value of the annual production of milk for the year 2013, according to the Central Statistics Organization, amounted to 158 million shekels, while the sales of the dairy sector reached about 420 million shekels for 2019.

¹¹ Palestinian Milk Council estimates



Marketing of powdered milk

According to the Paris economic agreements, the Palestinian side has a 20% share of the powdered milk market under the name of the powdered milk quota. It is distributed between commercial use, which is used as infant formula, small packages and full fat, in addition to low-fat industrial milk, which is used in some dairy products and also in the chocolate industry. In 2013, the quota of powdered milk reached 1868 tons, while that quota reached in 2019 about 2000 tons between industrial 600 tons and commercial 1400 tons.

The use of powdered milk in Palestinian factories:

Powdered milk is used by:

- Ice cream factories and Ras al-Abed 330 tons, or 50% of the quota
- Chocolate factories
- Dairy factories

Artificial milk quota during the last three years¹²

See Appendix No. (1) for a detailed statement

Milk Type	Company's Name	2019		2020		2021	
		Prepared quantity	License Amount	Prepared quantity	License Amount	Prepared quantity	License Amount
Artificial Milk Powder	Al-Jabrini	100 tons	100 tons	200 tons	100 tons	50 tons	50 tons
	Al-Arz Ice-Cream	330 tons	330 tons	242 tons	242 tons	154 tons	154 tons
	Hamouda for industry	100 tons	100 tons	200 tons	100 tons	200 tons	200 tons
	Sinokrot	100 tons	100 tons	200 tons	100 tons	200 tons	200 tons
	El Hajjar Chocolate	25 tons	25 tons	25 tons	25 tons	40 tons	-----
	Abu Khorshik	-----	-----	-----	-----	70 tons	-----
Total		655 tons	655 tons	867 tons	467 tons	714 tons	604 tons

A reading of the amount of powdered milk for the three years 2019-2021

- Dairy factories that operate with industrial powdered milk are each of Al-Jabrini and Al-Hamouda Dairy Factory at a rate of 200 tons out of a total of 600 tons, which is equivalent to one third of the amount of powdered milk.
- Ice cream factories (such as Al-Arz) consume 330 tons, or 55% of the quantity.
- Chocolate factories consume 125 tons, or 20% of the quantity.

An important note to be mentioned, is that if powdered milk is included in dairy factories, sweeteners, puddings and yogurt with a percentage of no more than 2%, it remains important to calculate the sold quantities of pudding, sweeteners and yogurt to ensure that they are the same permitted quantities within the specifications of dairy.

Also, it is worth noting that the Palestinian side's share of the milk quota is 20% of the Israeli quota, and it is imported directly from abroad

The truth about the use of powdered milk and its competition with fresh milk in the Palestinian market

The competition of powdered milk for fresh milk appeared in the market with the Corona crisis, and the tendency of some factory and factory owners to replace fresh milk with powdered milk. This has led to the emergence of a severe problem, as cow farm owners who were supplying milk to these factories, whose daily consumption rate is approximately 180 tons of milk per day, suffered from it, as most of the milk was used in the manufacture of cheese for pastry shops and during the periods of market closure due to the emergence of Coronavirus and the suspension of cheese production for these stores. The issue of powdered milk has clearly emerged to the surface and has become a great danger to cow farmers who produce milk and sell it to factories, which in turn have switched to using powdered milk in manufacturing.



¹² Data from the Palestinian Ministry of National Economy for 3 years 2019-2021

The most critical problems and challenges facing Palestinian fresh milk production

Milk producers, especially small milk producers in Palestine, face many problems and challenges that will negatively affect this sector, which is trying without developing to invest in this sector, in addition to the farmers, especially small farmers, incurring accumulated losses due to the Corona crisis.

Milk Imported from Israel

The annual milk consumption per capita is 71 liters, or approximately 40%. Where 30 liters are consumed from Israeli products in the first place, in addition to those imported from abroad in a second degree, and the importer includes yellow cheeses and cream. For example, the "Tnuva" company, which earns between 52 to 65 million dollars annually from its sales in the Palestinian markets¹³.

A rising trend of powdered milk use

Although there are restrictions on the percentages of using powdered milk in the dairy industry, and despite the ministry's request to submit statements regarding the mechanism of using and marketing powdered milk in order to renew the quota for powdered milk, there are fears and doubts that the permissible percentages will be exceeded (2%-5%), this justifies the significant increase in the consumption of powdered milk in addition to the powder milk that comes smuggled from the Israeli side, which has had its consequences for the cow breeders, which inflicted heavy losses on them as a result of the decrease in the purchase of fresh milk by dairy factories, which were previously the consumers of the quantities of milk coming from farmers.

Some estimates indicate a daily use of powdered milk of up to 15% in the dairy industry at a rate of 80 tons per day, in other words, sales losses to cow farmers per day of milk at a rate of 200.00 shekels if we assume the price of a ton of 2500 shekels.

There are also suspicions that dry milk from Israel may not be within the Palestinian specifications.

Many factories, under the pretext of the low production capacity of their factories, resorted to stopping buying fresh milk that they were buying from farms and replacing it with dry milk. Moreover, it may cause small farmers to leave this sector and stop production due to the accumulation of losses.

Important note: Palestinian laboratories do not have the possibility to ascertain the percentage of powdered milk used and whether it is within the permissible percentage.

13 <https://bit.ly/3v0G847>

A decrease in the pattern of milk consumption for the Palestinian citizen



Work to raise the milk consumption rate per capita, as the consumption rate per capita is 71 liters annually is relatively low compared to some Arab countries such as Algeria 145 liters or Mauritania 165 liters, or some European countries, or Israel where the consumption rate reaches 175 liters per year.

Rising feed costs

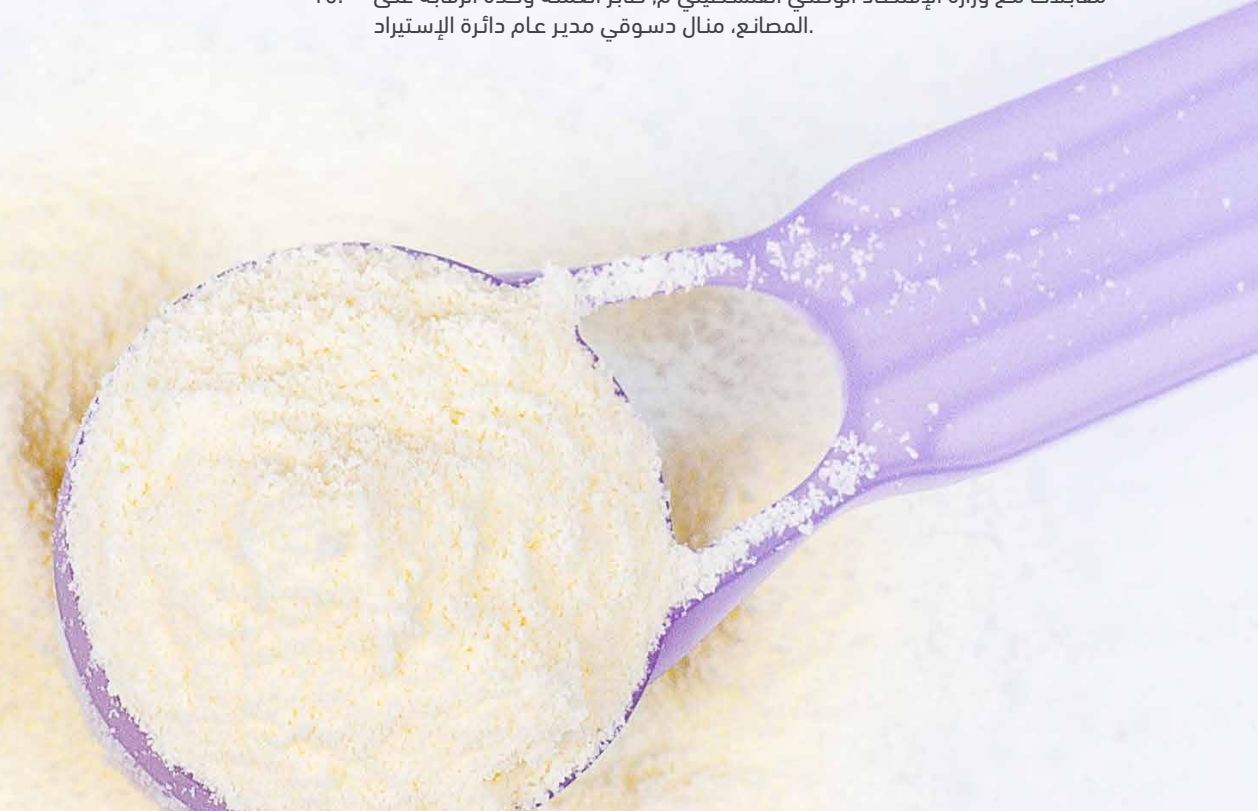
Which negatively affects the possibility of expansion in this sector and limits the possibility of expansion and increase in the number of cows, in addition to the high prices of fodder in addition to the lack of space for pastures, which may reduce the costs of production inputs. In addition, many factories have stopped discharging the agreed quantities of milk with farmers, which has worsened the ability of farmers, especially small farmers, to cover farm expenses, and consequently many farmers exited from raising cows and a decrease in the number of milk-producing cows.

Solutions and recommendations

1. Some dairy factories have stopped using “powdered” artificial milk in other than the area designated for it (we mean here sweeteners and puddings), which is widely used by many users in other varieties, especially dairy, exceeding the permissible percentage, as it contributes to solving a large part of the surplus milk, and constitutes a protection for small producers.
2. Pressurizing government agencies to control the use of powdered milk in the dairy industry and limiting the milk quota to ice cream and sweets factories.
3. Tightening control over dairy factories to control violators of the use of powdered milk outside what is permitted within the Palestinian standard.
4. Increasing the share of the dairy sector in the market through cooperation with consumer protection associations and government agencies and the Ministry of Education, to carry out systematic awareness campaigns for the consumer about the importance of fresh milk to raise the per capita consumption of fresh milk in addition to other dairy products.
5. Activating the role of the Palestinian Milk Council, so that it becomes the body that monitors milk products and supplies them to factories with high quality.
6. In addition to the role of the Institution for Standardization and Metrology in controlling compliance with the use of fresh milk in factories and within the Palestinian standards.
7. Tightening control over the use of powdered milk coming from the Israeli side, which in turn finds its way into the Palestinian dairy industry without any oversight.
8. Adding milk products in the food aid basket, whether those provided by the government to families or non-governmental organizations working in the relief sector in times of emergency.
9. Work to find a laboratory to test the amount of powdered milk used in the dairy industry to ensure that factories comply with the permissible percentage and not exceed that percentage.

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Indix

Appendix (1) Names of those interviewed for the study

Name	Position
Bassam Abu Ghalioun	President of the Federation of Food Industries
Kamel Mujahid	Chairman of the Board of Milk and Farms
Issa Al-Bituni	Food Processing Engineer
Saber Al-Imleh	Factory Control Unit - Ministry of National Economy
Mrs. Manal El Desouky	General Director of the Department of Foreign Trade, and the Ministry of National Economy
Mr. Salah Haniyeh	Consumer Protection Association
Hani Abu Hamada	Cow farms - Tel Nablus
Ahmed Ramadan	cow farms
Wassef Nazzal	Qalqilya cattle farms

Appendix (2) Palestinian Ministry of National Economy data for 3 years on the amount of formula milk¹⁴

importing company	2019			2020			2021&&	
	Prepared quantity	License Quantity	statement quantity	Prepared quantity	License Quantity	statement quantity	Prepared quantity	License Quantity
Al-Jabrini	100	100	99.975	200	100**	100	50	50
Al-Arz ice cream	330	330	330	242	242	242	154	154
Hamouda for industry	100	100	96	200	100**	96	200	200
Sinokrot	100	100	95.975	200	200	200	200	200
Al Hejaz Chocolates	25	25	15	25	25	15	40	
Abu Khorsik							70	
Total	655	655	636.95	867	467	653	714	604


** Quantity has not been completed due to the Corona pandemic (apology book is available)

&& Quantity granted until the end of the year to submit customs data

14 Source: Directorate of Foreign Trade, Palestinian Ministry of National Economy





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