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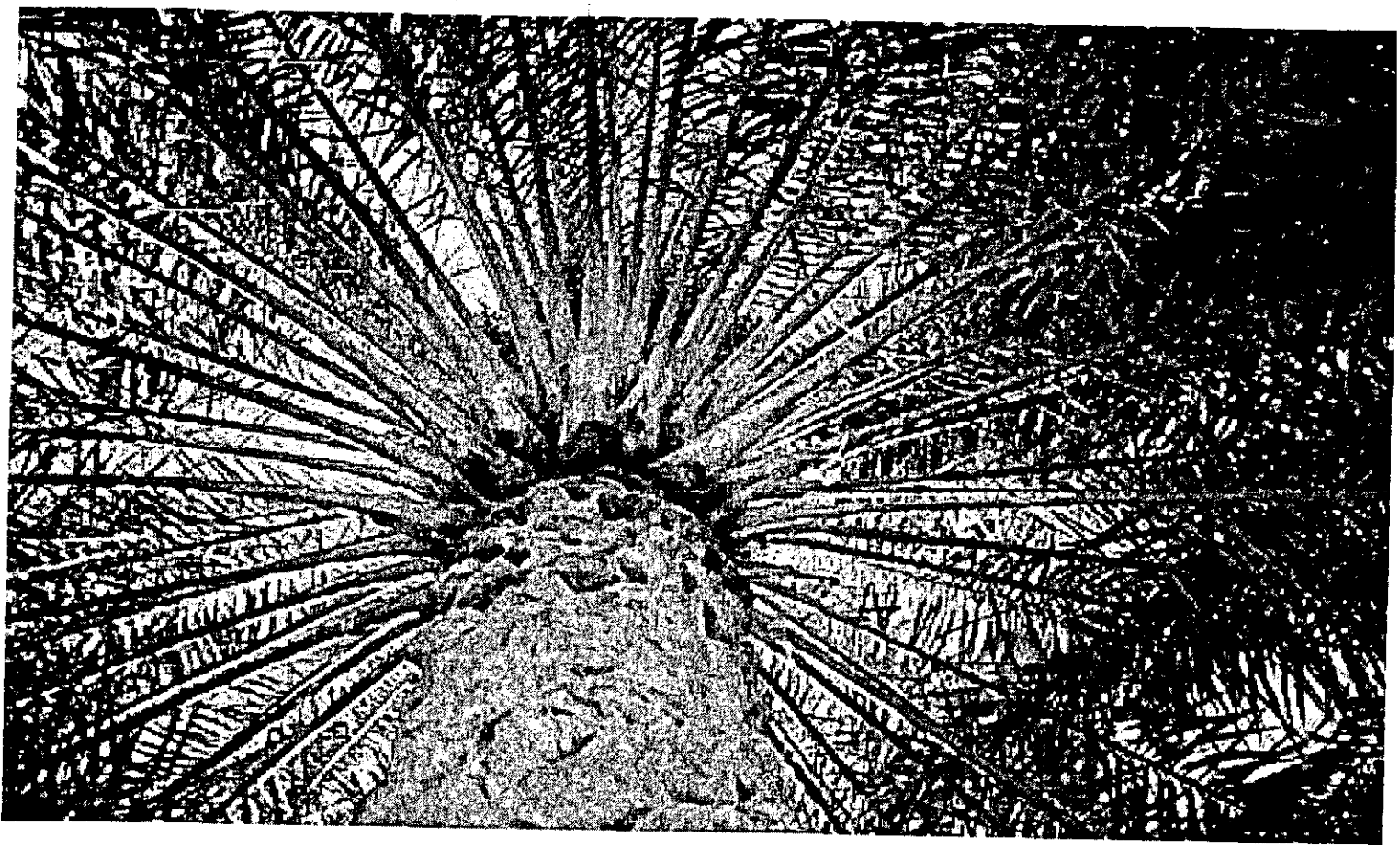

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REHABILITATION OF THE DATE PALM SECTOR IN IRAQ - SURVEY

FINAL REPORT

Submitted by

Coffey International Development – Middle East

14 August 2008

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SPECIALISTS IN DEVELOPING COMMUNITIES

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REHABILITATION OF THE DATE PALM SECTOR IN IRAQ – SURVEY

DRAFT REPORT

Submitted by

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1 EXECUTIVE SUMMARY

UNIDO and the FAO are supporting the Iraqi Government to rehabilitate the date palm sector. The broad aim of their joint project of support to the sector is to contribute to productive employment and improved food security in Iraq through increased agricultural production and productivity. The project will focus on building production, through improved agronomic and irrigation practices, and on building capacity in storage, processing, and packaging and marketing.

The first stage of the project is to make an assessment of the current status of the date industry. UNIDO, in support of the Iraqi Government, commissioned a survey to assist in determining the current status of production and processing facilities, marketing and general trade performance and constraints to industry development and operations.

Two surveys were conducted in December 2007 and January 2008, one focused on marketing and the other processing. A total of 36 date processing and marketing facilities in Baghdad, Basra, Al-Hillah, Diala and Karbala were reviewed, representing both the private and public sectors.

The surveys were conducted with full support from national counterparts at the MOA, MOT and COSIT in Iraq. Data collection was also coordinated with the National Program for Propagation and Improvement of Date Palm at Abu-Garib.

The surveys were conducted by Iraqi nationals who were trained in Jordan to administer the process to ensure data accuracy.

The world's date consumption has risen during the last three decades by almost 300%. The Indian market consumes almost 36% of the total world's date imports. The market is predicted to continue to increase at an annual rate of 5%.

The date palm industry has always been very important to Iraq, both culturally and economically. Up until the early 1990's, Iraq was the world's largest date exporter. The war has caused the fast decline of the industry. Not only has Iraq the task of rebuilding the industry it has now to face stronger competition from neighbouring and regional producers.

The survey results indicate several areas that Iraq will need to address in order to take address this.

Not only has the war made transport and timely export supply difficult, but it appears that during the years preceding the war, the industry was already sliding into disrepair. Many current facilities and equipment require considerable renovation and repair. Maintenance is very poor due to limited access to spare parts and finance. There is little to no continual improvement of equipment, or staff capacity. Where businesses had invested in forming management plans, they have not been followed. Marketing activities are ad hoc.

Obviously, reaching a peaceful conclusion to hostilities in Iraq would have the greatest impact on the industry. However, in the context of the current situation, to turn around

the industry a comprehensive long-term program of interventions are recommended which address the breadth of current issues affecting date processing and marketing. The Government of Iraq, with its partners UNIDO and the FAO have already identified the need to support a range of initiatives across production, processing and marketing.

One of these initiatives is to undertake the rehabilitation of one of the existing production facilities as a model for development. The report recommends that the facility at Al Shalchia be considered for rehabilitation. The reasons for this are:

- The plant is in a significant date production area and so services and provides easy access for the collection and transport of dates from surrounding area;
- The plant is also close to Baghdad and there are many benefits flowing from this including access to markets, ease of transport, access to labour and technical support, security, etc;
- The plant itself is in poor condition;
- There are already considerable existing technical capabilities and access to labour at the plant, which are not being utilised as they should given the status of the plant's condition; and
- The facility at has been a prominent plant in the past and, given this prominence and its proximity to Baghdad, we feel its rehabilitation would be a good sign for the Iraqi people that the date industry is re-emerging.

Although this survey's scope does not include the design of possible support programs a number of possible areas for consideration have emerged. These include:

- Supporting the upgrading of other public and private processing facilities to improve the quality of dates ready for export and to allow for quicker to-market time (option may be to offer low-interest/ no interest loans for equipment purchasing to allow for an overhaul of production equipment);
- Ascertain whether Iraq should open up direct supply lines with export markets rather than seeing its product re-exported through countries such as the UAE and Iran;
- Support to the development and implementation of a regional and international marketing campaigns;
- Support to the identification of niche export markets for date syrup and vinegar (currently only being sold domestically);
- The development of an 'Iraq date' brand for marketing purposes;
- Decentralisation of bureaucracy to allow independent and quick decision making by growers and producers;
- The provision of ongoing skill development for managers, marketers and technical across a range of related fields;

- The reinforcement of and support to the need for standards across production, processing and marketing and including farmer awareness of the need for and benefits of production of high-grade products;
- Incentivising the market and small suppliers to increase market competitiveness and weaken the power of the three major buyers; and
- Investing in improving the power supply and the grid to production facilities.

2 INTRODUCTION

The following comprises the Draft Final Report of the Assessment of the Date Palm Processing and Marketing Sector in Iraq (UNIDO Project No: FB/IRQ/07/003).

The aim of the report is to detail the findings of the survey carried out in Iraq of date processing and marketing, including data analysis, conclusions and recommendations.

3 BACKGROUND

The history of the date palm tree has always been linked to the history of the Iraqi people. Archaeological evidence demonstrates that the possible origin of the date palm might be Southern Iraq – Mesopotamia. Certainly there is clear evidence which indicates that the Sumerians, Akadians and Babylonians used palm tree trunks and fronds in building the roofs of their houses almost 4000 years ago[1].

The date palm tree has been a main source of food for the people of the Middle East and North Africa region. The fruits provided a concentrated energy food that could be easily stored and carried on long trips across the deserts and seas. On The by-products of the palm were important in providing the needed shelter, shade and protection from the desert sun and wind on these journeys.

Significant changes in the cultivation and production of date palms took place after the discovery of oil in the Middle East in the early 1930s and 40s. Increased wealth and the resulting industrialisation, together with improvement in transportation systems resulted in changes to date palm cultivation, processing and marketing within region.

Improvements in the standard of living within many parts of the region has also led to changing food consumption trends, including the introduction of many substitute fruits and substitute products. While the reliance on the date palm as a major staple in the region has declined somewhat with these changing trends, its position and place as a symbol of culture, heritage and the people has not. The date palm continues to dominate the rural and domestic landscape. This is particularly true in Iraq where the date palm is considered to be a national treasure and the health of the date industry is considered by many to be a reflection of the health of the country.

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[1] Date Palm Cultivation - FAO Plant Production and Protection Paper 156 Rev.1 Edited and compiled by Abdelouahhab Zaid, Chief Technical Adviser/Director UNOPS - Date Palm Research & Development Programme - United Arab Emirates

4 THE PROJECT - REHABILITATION OF THE DATE PALM SECTOR IN IRAQ

UNIDO and the FAO are supporting the Iraqi Government to rehabilitate the date palm sector. The broad aim of their joint project of support to the sector is to contribute to productive employment and improved food security in Iraq through increased agricultural production and productivity. The project will focus on building production, through improved agronomic and irrigation practices, and on building capacity in storage, processing, and packaging and marketing. It is expected that project assistance will include training and skill development, the introduction of enhanced processing and manufacturing methods and the provision of support to national and international marketing efforts. The project will also provide assistance to the rehabilitation of processing industries and marketing organisations.

4.1 The Survey – An Assessment of the Date Palm Processing and Marketing Sector

The first stage of the project is to make an assessment of the current status of the date industry. UNIDO, in support of the Iraqi Government, commissioned a survey to assist in determining the current status of production and processing facilities, marketing and general trade performance and constraints to industry development and operations. The survey will allow the Iraqi Government and its donor partners to more clearly focus project implementation initiatives in accordance with the real needs of the industry.

The two specific objectives of the survey were:

- to conduct an assessment of the date palm processing industries and factories (government-owned, semi-government and private) in the middle and south of the country; and
- to conduct a market assessment survey and analysis of the current status, constraints and opportunities of date marketing in Iraq, in the region and internationally.

4.2 Survey Implementation

The terms of reference related to the implementation of the survey are included as Appendix A.

4.2.1 Survey Methodology

The survey methodology used as its foundation the steps laid down in UNIDO's terms of reference. The survey followed a four-phased approach as follows:

Phase 1: Inception

The Inception Phase involved three main activities:

1. Project kick-off meeting with UNIDO and key counterpart implementing agencies
2. Mobilisation of the project team
3. A review of existing documentation and materials.

Phase 2: Survey preparation

Two surveys were conducted to achieve the objectives of this assessment:

1. A survey of the date palm industries/factories (Government-owned, government-private owned and private date processing factories); and
2. A market assessment survey

Phase 3: Survey implementation

Phase 4: Survey analysis and report preparation

4.3 Implementation by Phase

4.3.1 Inception

The consultant commenced mobilisation activities immediately upon receiving official confirmation of contract award from UNIDO. It was planned to have an initial project Kick-off meeting in Jordan with key stakeholders after one week of signing the contract. Jordan was proposed as the location for the meeting given the security situation in Iraq. However this timetable proved to be ambitious given the protocol requirements to mobilise Iraqi counterparts and meeting took place a month after the contract award.

In the interim period, the contractor prepared draft survey documentation for discussion and approval at the kick-off meeting and also commenced its desk study activities.

Proposed topics for the Kick-ff meeting included: confirmation of the terms of reference, a review of the situation in country, an understanding of any UNIDO priorities for attention, key contacts and communication protocols with stakeholder reporting protocols and other issues of relevance to carrying out the assignment. A copy of the agenda is included in Appendix B. Participants included representatives from UNIDO, MOT, MOA, COSIT, Iraq Date Processing & Marketing Company and the survey contractor.

The Kick-off meeting enabled extensive consultation among all parties and reviewed activities across all stages of study implementation. Considerable time was spent looking at the structure of the survey. It was important that the survey approach and documentation was in accordance with COSIT requirements and that there was consensus as to the wording of the survey instruments as the survey was to be undertaken in Arabic to ensure full understanding and consistency of response.

In addition, emphasis was given to determining the level of participation of each of the stakeholder groups involved and to their various roles and responsibilities in survey implementation.

1. Project Kick-off Meeting - Amman

COSIT, MOT and MOA were able to provide access to existing industry data and this, together with the already significant library of information available to the consultant (who had done previous work on the date industry in Iraq), made up a reasonably comprehensive base with which to compliment the survey information.

A copy of the minutes from the Kick-off meeting is included in Appendix C.

4.3.2 Survey preparation

Two surveys were conducted:

1. A survey of the date palm industries/factories (Government-owned, government-private owned and private date processing factories); and
2. A market assessment survey which covered the major stakeholders involved in the marketing of date palm in the middle and the south of Iraq including date producers (farmers) and marketers (mainly at the wholesale markets in the major cities: Baghdad, Karbala, Babylon and Basra).

Draft survey documentation was prepared and presented for discussion at the Kick-off meeting. Minor changes were made and approved by UNIDO and Iraqi counterparts. Copies of the final survey documents are included in Appendix D.

4.3.3 Survey implementation

Prior to commencing the survey, Iraqi enumerators were brought to Jordan to undertake 2 days of training in protocols for completing the survey instruments, to discuss outcomes of the Kick-off meeting and to finalise logistics of survey implementation. Given the importance of COSIT support in survey implementation it was also decided to bring two COSIT representatives to Jordan to participate in the pre-survey activities.

The survey commenced directly on return of the enumerators to Iraq and was carried out from December 2007 through to January 2008. Unfortunately, this period coincided with a major public holiday period involving a number of religious and other holidays including Eide al Adha, Christmas and New Year. These holidays- typically extended resulted in delays to the survey.

The in-Iraq survey team completed survey activities in the cities of Baghdad, Basra, Al-Hillah, Diala and Karbala. These five cities are considered the main date production centres in Iraq.

The survey team was able to survey:

- the main seven (7) date markets in the targeted governorates; and
- the major twenty nine (29) date processors in the targeted area of the study.

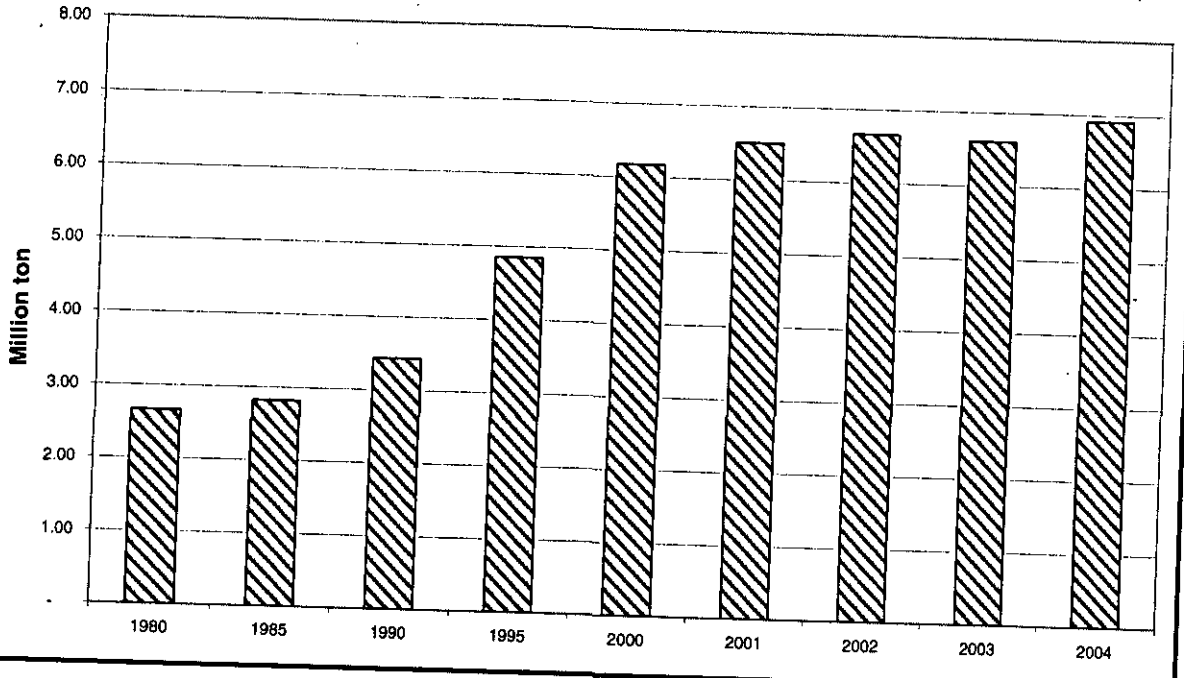
A total of thirty six (36) date production and marketing facilities from both the private and public sectors were surveyed.

The two surveys were conducted with full support from the national counterparts at the MOA, MOT and COSIT in Iraq. Data collection was also coordinated with the National Program for Propagation & Improvement of Date Palm stationed at Abu-Garib.

5 DATE PRODUCTION IN IRAQ

Since 1980, world date production has increased by more than 250%. During the period 1980-2004, world production increased from 2.7 million tons in 1985 to 6.91 million tons in 2004 as demonstrated in Figure 1 (FAO, 2006).

Figure 1 World Production of date (1980-2004) Million ton



Source: FAO, http://faostat.fao.org/site/408/DesktopDefault.aspx?PageID=408

Iraq was always one of the world's major producers and exporters of dates and date products. As indicated in Figure 2, despite the impact of war and insecurity, Iraq is still one of the major world producers. However, Iraq's share of the world production decreased from 22 percent in 1980 to 18 percent in 1995 and then to only 13 percent in 2004. According to FAO (2006) Iraq's date production was estimated at 0.88 million tons in 2004 compared to the world production of 6.9 million tons.

Figure 2 Iraq vs world date production 1980-2004

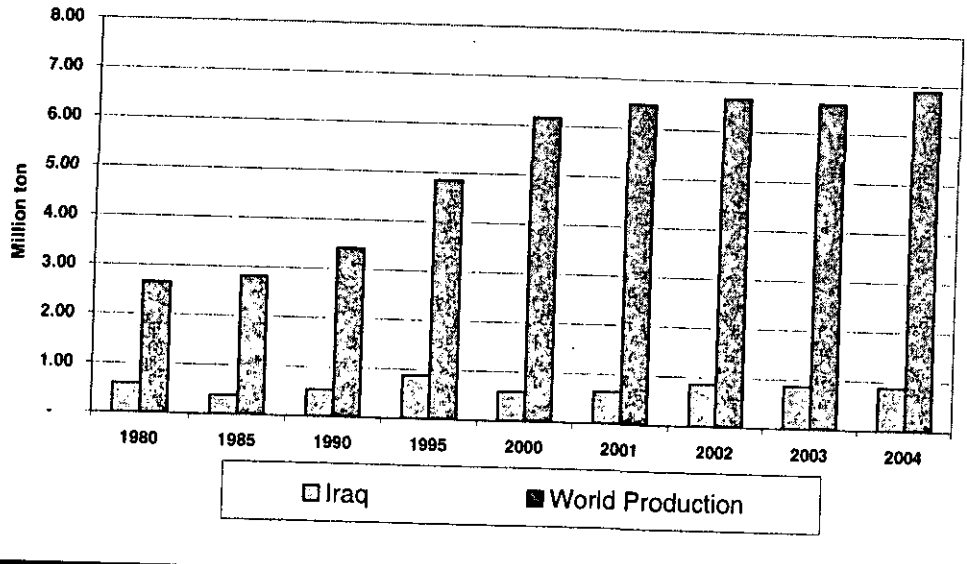


Table 1 shows the distribution by Governorate of the number of cultivated date palm trees in Iraq. It is clear from the table that palm cultivation is concentrated in the Governorates of Babylon, Karbala, Baghdad, Diala, Basrah, Thi-Qar, Al-Anbar and Al Najaf. Palm cultivation also occurs in other Governorates but to a lesser extent. The table shows that the dominant five Governorates are Babylon, Karbala, Baghdad, Diala and Basrah. More than 65 percent of date palms are cultivated in these. . Babylon is the leading Governorate and has 14.4 percent of Iraqi date palm trees.

Table 1 Distribution of date palm cultivation by governorate and by sex according to agriculture censuses results conducted in 2001 (number of palm trees)

Governorate	Number of Male Plants				Number of Female Plants				Total date
	Total	In Producti on Stage	Haven't reached Production Stage	Planted during the last year	Total	In production stage	Haven't reached production stage	Planted during last year	
Nineveh	21	1	20	-	9	1	4	4	30
Karkuk	133	105	25	3	982	583	304	95	115
Diala	55,585	49,325	5,896	364	1,124,207	966,709	124,292	33,206	1,179,792
Al-Anbar	21,370	20,478	817	75	563,527	500,237	53,689	9,601	584,897
Baghdad	73,530	64,524	6,958	2,048	1,134,131	896,397	181,557	46,177	1,207,661
Babylon	76,279	70,144	5,548	587	1,281,982	1,032,988	208,377	40,617	1,358,261
Kerbela	62,507	59,677	2,489	341	1,282,931	1,100,835	143,206	38,890	1,345,438
Wasit	28,471	24,728	3,338	405	461,619	344,543	91,909	25,167	490,090
Salah Al-Dean	13,417	11,119	1,978	320	164,665	111,667	40,961	12,037	178,082
Al -Najaf	34,809	31,293	3,112	404	499,062	419,951	64,028	15,083	533,871
Al-Qadisiya	31,897	28,372	2,407	1,118	387,371	334,201	50,212	12,958	429,268
Al-Muthanna	32,133	27,736	4,017	380	346,441	220,096	95,885	30,460	378,574
Thi-Qar	50,117	42,861	6,014	1,242	577,759	439,247	103,829	34,683	627,876
Maysan	9,272	8,386	659	227	132,168	106,952	19,322	5,894	141,440
Basrah	38,759	33,221	4,425	1,113	969,154	789,065	130,565	49,524	1,007,913
Kurdistan Region									
Duhouk	-	-	-	-	-	-	-	-	-
Arbil	-	-	-	-	-	-	-	-	-
Sulaimaniya	-	-	-	-	-	-	-	-	-
Total	528,300	471,970	47,703	8,627	8,936,008	7,263,472	1,318,140	354,396	9,464,308

Source: Iraq Central Organization for Statistics and Information Technology, 2006

Iraqi date experts believe that there are about 629 identified varieties of dates cultivated in the different regions of Iraq. Nevertheless, as indicated in Table 2 below, the main variety cultivated in almost all parts of Iraq is the Zahdi which represents 67% of the total date production in the country. The Zahdi is the most famous date variety produced in Iraq. It has a high content of total sugar which approaches up to 82% on a dry weight basis. Zahdi is also known for its high sucrose content as a percent of the dry weight - often up to 17 percent. Zahdi is considered to be a semi-dry variety based on its external qualities of texture and pliability at the tamr stage,

Table 2 shows that Khistawi is the second dominant date variety. Khistawi is a soft – early ripening variety with high level of sugar content. In terms of early marketability and texture, Khestawi is considered a higher quality variety than Zahdi.

Table 2 Distribution of date production by variety for the year 2005

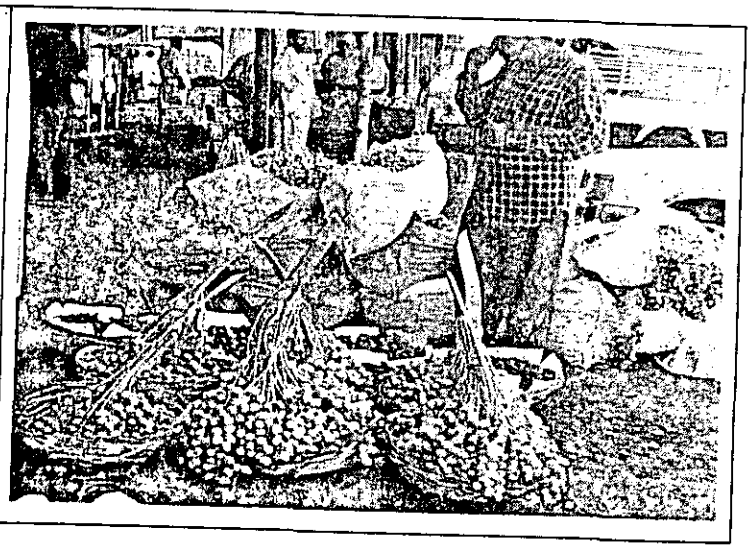
Variety	No. of female date-palms (000) tree	productive date – palms (000) tree	Average yield per productive tree/Kg.	Total Production (10 ton)
Zahdi	5,429	4,624	59	27,191
Sayer	358	289	45	1,314
Hillawi	397	317	56	1,758
Khadrawi	482	364	41	1,487
Khistawi	1,066	844	53	4,450
Deary	181	137	56	771
Others	1,023	639	54	3,432
Total	**8,936**	**7,214**	**52**	**40,403**

Source: Iraq Central Organization for Statistics and Information Technology, 2006

6 LOCAL MARKET ANALYSIS.

Dates have three stages of maturity: Khalaal, Rutab and Tamr. The development at each of these three stages determines the harvesting and marketing of the fruits. A farmer's decision for harvesting at any stage depends on the features of the variety, climatic conditions, prices and market demand. The Tamr stage is when most dates are marketed in Iraq.

Khalaal: At this early stage of maturity, the moisture content in the fruit is around 50 percent, hard and crisp, physiologically mature, highly perishable, and bright yellow or red in colour. Only some varieties are sweet at this stage and can be sold, such as the Osta, Omran and Barhi.



Rutab: Is the stage when the fruit is left on the tree to mature. In this stage the fruit turns into half brown and half yellow or red. Dates in the Rutab phase have lower moisture content, increased sucrose content, and tannins will start to precipitate and lose their astringency.	
Tamr: This is the final stage of fruit maturation. It is achieved when the fruit is left on the tree (if climatic conditions are favourable). Dates turn brown in colour, and the moisture content is at a self-preserving maximum of 25%. Most of the dates are harvested in the "tamr" stage. At this stage the fruit has about 60 to 80% sugar content depending on location and variety. The majority of Iraqi dates sold at the local wholesale markets or to traders are marketed in the form of Tamr.	

A recent study by the USAID program, *Agricultural Rehabilitation Development Iraq, (ARDI) (2004)* concluded that 80 percent of marketed dates in Iraq are sold as Tamr. They flow through several marketing channels from producers until they reach consumers in the local and international markets. Most dates are purchased by a few big buyers who buy the fruit direct from the farm. These dates then are taken to packing houses (also owned by the few big buyers) and packed in different types and package sizes and then exported, typically to UAE or/and India.

The Iraqi Dates Processing and Marketing Company (IDPMC) is a company jointly owned by the public and the private sectors. IDPMC was the major date purchaser and exporter until the 2002/2003 production season. The company remains the legal body for issuing quality control certificates for exported dates in Iraq. As explained later in this document, the company owns a large number of facilities in both Baghdad and in other governorates.

The role of 'petty traders', the small retailers scattered around the country is significant. Some are linked to wholesalers, traders and big buyers. They play an important role in packing and packaging small quantities at their shops mainly for local consumers. Other petty traders buy small quantities of fruit directly from farmers and sell it either at the local markets or to shops or directly to consumers. The majority of petty traders or retailers still use traditional methods in processing dates. No data or detailed information is available on this group of marketers

7 EXPORT MARKET ANALYSIS.

The Middle East and North Africa (MENA) region is produces and exports more dates than anywhere else in the world. Table 3 details average annual exports (in tons) of the major date exporting countries in the world for the period 1980-2005. The table demonstrates that United Arab Emirates is the leading exporter followed by Iran. It is clear from the table that Iraq used to be the world's largest exporter during the eighties and early nineties. The table indicates that, following the first Gulf war, UAE and Iran became the leading exporters. This is because much of the Iraqi date production was and is still exported through these two countries. Much of the date production exported from Iraq to Iran and UAE is in raw and bulk form.

Table 3 Leading world exports of dates during 1980-2005 (000 tons)

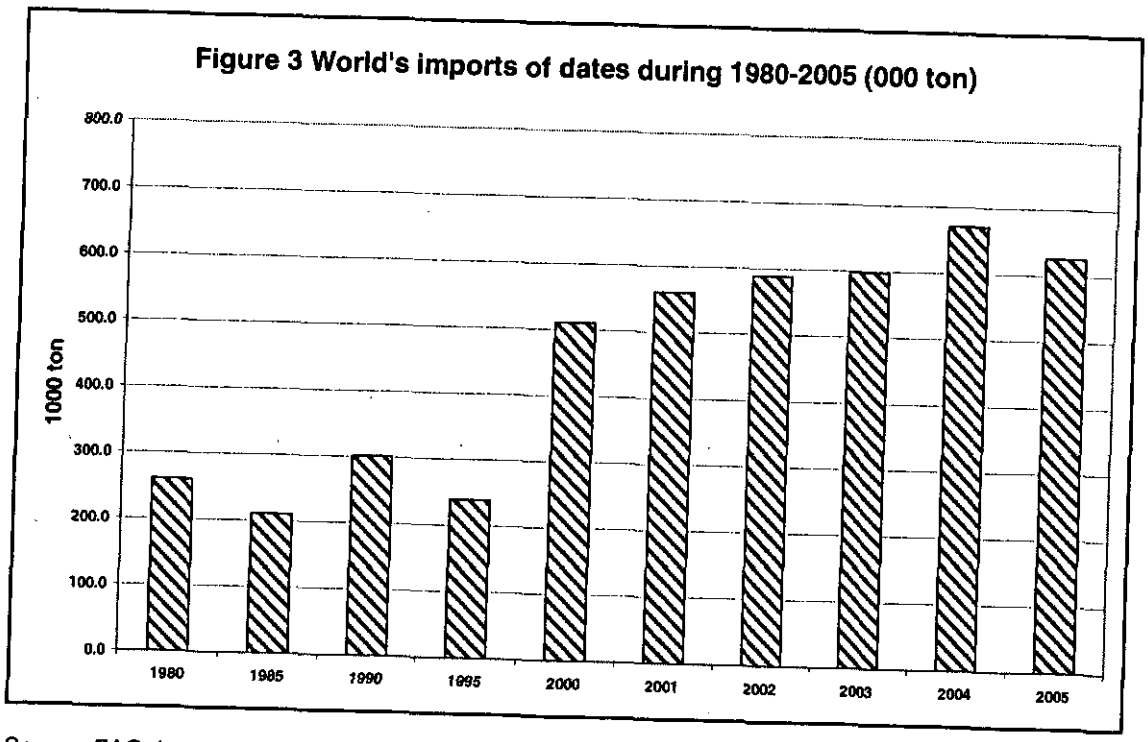
Country	1980	1985	1990	1995	2000	2001	2002	2003	2004	2005	Average
United Arab Emirates	2.7	1.7	67.6	32.0	65.9	359.8	259.4	256.6	62.1	23.9	171.3
Iran, Islamic Rep of	0.6	15.1	20.4	100.4	107.9	119.4	113.5	120.1	94.6	117.1	112.1
Pakistan	0.2	20.6	50.9	34.3	78.7	69.4	77.5	71.2	65.4	84.1	74.4
Tunisia	5.4	15.2	18.0	20.9	22.4	47.0	41.9	37.1	40.4	50.2	39.8
Saudi Arabia	12.7	27.4	12.5	15.0	30.9	31.9	33.9	35.3	47.6	51.5	38.5
Iraq	228.0	110.0	126.6	0.2	0.6	4.0	7.8	13.9	23.5	22.9	12.1
Algeria	1.3	6.7	8.6	21.9	10.8	7.9	11.0	10.2	8.1	10.9	9.8
France	5.6	6.2	7.2	5.5	9.6	8.5	7.6	8.4	8.4	9.0	8.6
Oman	2.4	3.7	2.7	5.7	8.4	13.0	5.0	4.7	4.8	4.1	6.7
Israel	1.9	1.5	4.3	7.4	1.3	1.4	3.5	8.6	6.4	9.1	5.1
United States of America	7.6	1.5	5.3	5.8	3.2	4.1	3.4	4.1	4.2	4.3	3.9
Egypt	0.1	0.8	1.7	2.5	2.7	0.6	4.6	1.8	2.9	8.9	3.6
Total World Exports	297.2	232.0	358.1	271.9	359.3	688.0	588.5	601.6	384.6	416.7	

Source: FAO, http://faostat.fao.org/site/408/DesktopDefault.aspx?PageID=408

7.1 Market window opportunities for Iraqi dates in world markets

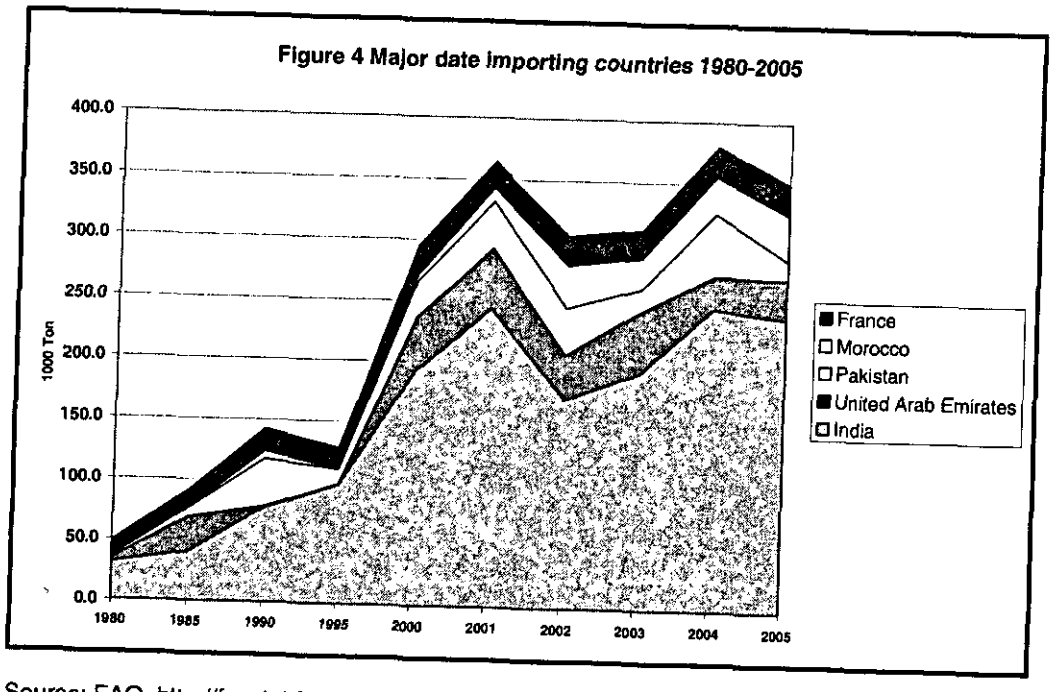
World date consumption has been increasing during the last three decades. Trade figures for this period show that world's date imports and exports have increased by almost 300% as detailed in figure 3. India is the leading world importer of dates, based on the average imports during 2000-2005.

Figure 3 World's imports of dates during 1980-2005 (000 ton)



Source: FAO, http://faostat.fao.org/site/408/DesktopDefault.aspx?PageID=408

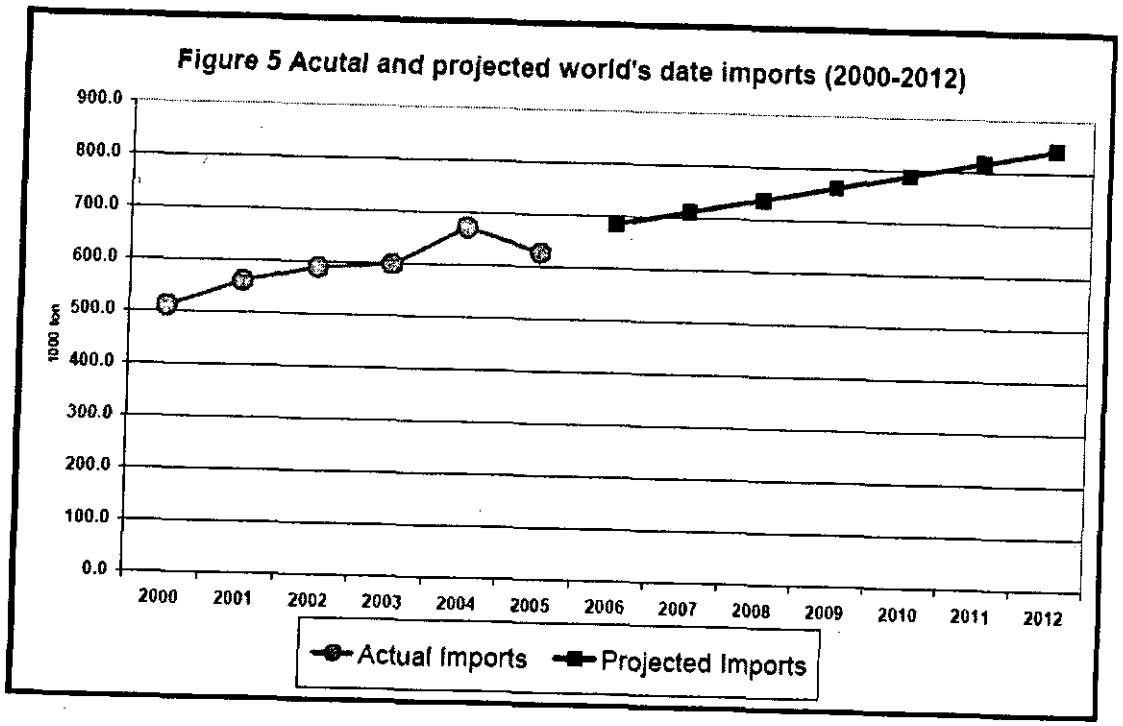
The Indian market has absorbed an average of 36% of the world's imports of dates followed by the UAE market which imported about 7 percent (Figure 4). As indicated above, the UAE is also a major exporter of dates. According to date traders in Iraq, the UAE acts as a regional hub for the date business through exporting and importing much of the traded date in the region.



Source: FAO, http://faostat.fao.org/site/408/DesktopDefault.aspx?PageID=408

Figure 5 below provides a projection for future world date imports. Based on trade data during 2000 to 2005, the future import trend for the years 2006-2012 is projected as shown.

The projected world market for date imports is promising. The trend indicates that, if the current market situation continues, the world trade imports will increase at an annual rate of 5 percent. Based on this estimate, the world imports of date will approach around 850 thousand (850,000) tons in the year 2012. This indicates that there is a significant future opportunity for exporting Iraqi dates even to traditional markets like India, Pakistan and Morocco.



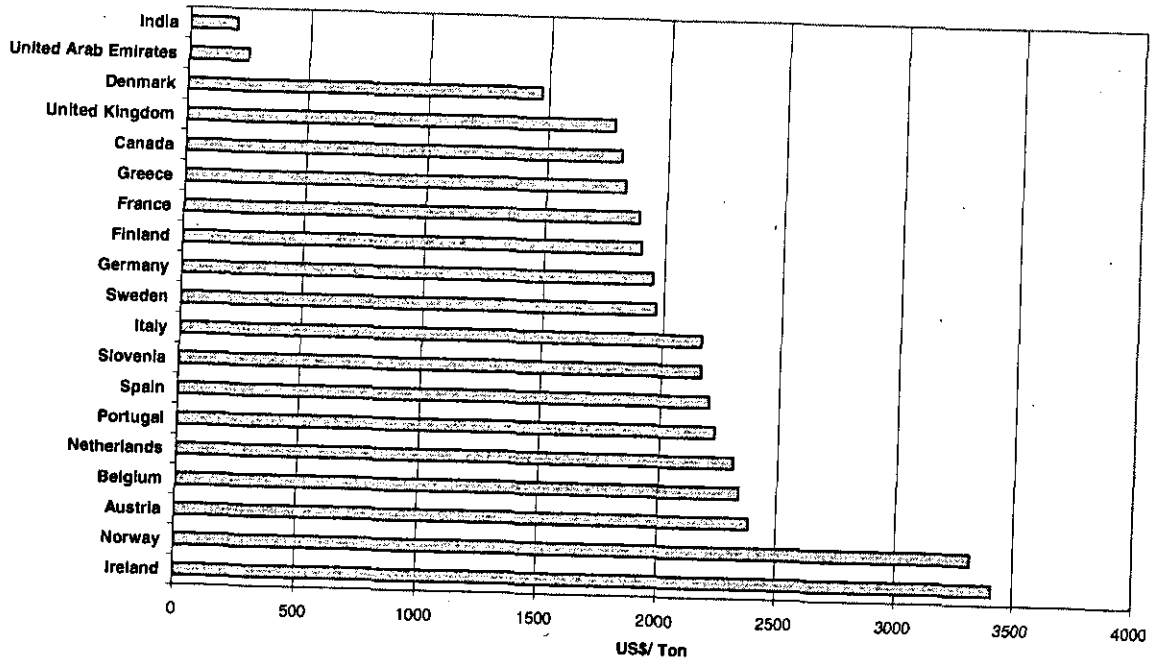
Source: FAO, http://faostat.fao.org/site/408/DesktopDefault.aspx?PageID=408

7.2 Opportunities for improving the Iraqi dates system

Despite the fact that India and UAE are the world's major importers in volume (metric tons), the unit value of imports (US$/ton) is low when compared to the other importing countries. This indicates that the two countries are importing the lower quality dates available in the market or importing raw dates for processing. Interviews with date marketers in Iraq revealed that much of the Iraqi date product is exported raw to UAE and Iran. It is also believed that a large portion of the exported date to UAE is re-exported to India and Pakistan, especially prior to the Muslim holy month of Ramadan.

Figure 6 shows the significant difference in prices (or unit value in US$/ton) of imported date to EU countries, UAE and India. Higher prices imply higher or premium quality of produce. Exports to the EU markets must comply with the minimum quality standard set by the EU or by chain store organizations such as the EUROGAP (EURO Good Agricultural Practices).

Figure 6 Unit value of imported date by country (average of 2000-2005) in US$/Ton



To further explain the implications and the opportunities of exporting high quality dates, Figure 7 shows the trend of date import values at the global level, the EU level, India and UAE. As mentioned earlier, in terms of quantity of imports, India and UAE are the major world importers (their share together is about 41 percent). However, in terms of value the two countries import only 16%, while the EU imports some 41% of the total imports by value. This indicates an opportunity to increase the amount of high quality date exports. This would require a rethink of current export strategies. It would necessitate value adding to production in Iraq through modernization of the current equipment, improved packaging materials, processing and storage facilities, etc.

8 SURVEY FINDINGS

The following details the quantitative analysis of the two surveys. During the period December 2007 and January 2008, the study team in Iraq surveyed the main date processing plants in the cities of Baghdad, Basra, Al-Hillah, Diala and Karbala. The five cities are considered the main date production centres in Iraq. The two analyzed questionnaires were prepared to develop a comprehensive understanding of the industry's processing and marketing sector and to inform a potential program of support to the industry. The first questionnaire targeted the date processors and the second targeted marketers of processed dates and date products. The two questionnaires were completed by a team of Iraqi enumerators through face to face

interviews. The interviews were conducted at the processing plants or at the offices of the marketers.

8.1 Marketer's Questionnaire

This questionnaire consisted of eight sections as follows:

Section A: Company Information
Section B: Marketing Outlets of the Company
Section C: Marketing Mechanisms adopted by the Company
Section D: Trade Performance Issues of Processed Dates
Section E: Trade Performance Issues of Unprocessed (Raw) Dates
Section F: Processed Dates by Variety
Section G: Identification of the Main Constraints
Section H: Identification of Training Needs

8.1.1 Section A: Company Information

The survey team interviewed 7 major marketers of dates in the country. These include

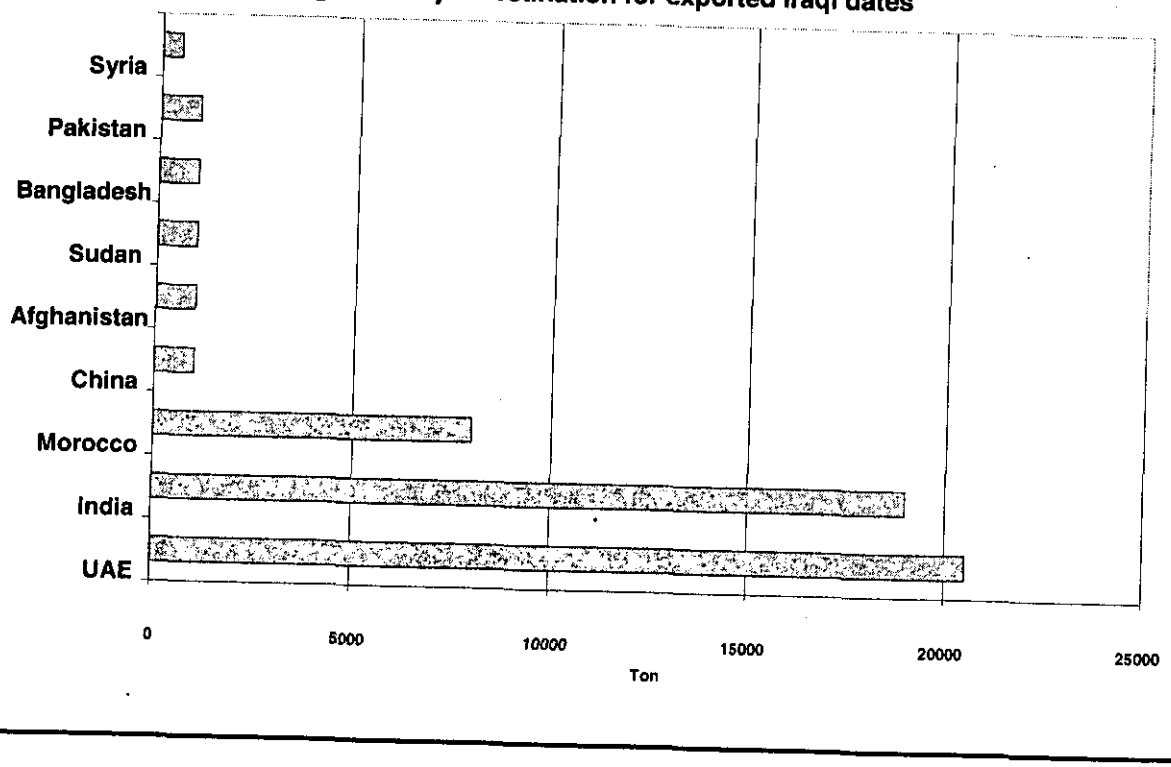
1. Hazeer Kathem/Marketer (private) located in Al-Khalis
2. Khaleel Ibrahim/Marketer (private) located in Al-Khalis
3. Al-Barari Company (private) *in located in* Al-Hendia
4. Al-Barari Company (private) in located in Karbala
5. Al-Krar Company (private) located in Karbala
6. Iraq Dates Processing and Marketing Company (mixed) located in Al-Kazmeiah which also has the processing plants in Baghdad, Karbala, Basra, Babel and Baqubah
7. Kareem Zmeazem Company (private) located in Karbala

- These marketers, as demonstrated later, exported the majority of Iraqi dates in the year 2005. According to FAO trade data, Iraqi official exports in 2005 were around 22 thousand tons. However, one of the interviewed marketers advised that his company had exported over 20 thousand tons themselves, appearing to contradict FAO's figures.
- The educational level of the managers of marketing firms interviewed was as follows: 4 managers held high school degrees; one held a university degree and one had a middle school degree.
- Only one firm is a partnership between the private and public sector while all other firms are private.
- The seven marketers are marketing only dates.

8.1.2 Section B: Marketing Outlets of the Company

- During the 2005/2006 season the seven marketers marketed a sum of 64 thousand tons of dates. According to COSIT the total date production of the different varieties in 2005 amounted to about 404 thousand tons. Therefore, the interviewed marketing groups marketed 16 percent of the total national production of dates.
- The average marketed quantity per firm was 9,147 tons. The minimum marketed quantity was 2,000 ton while the maximum marketed quantity per firm amounted to 20,000 tons.
- Two firms marketed a sum of 6,470 tons of dates in the local market (only) while the rest were exported to different destinations as demonstrated in figure 8 below.
- As shown in Figure 8, the UAE was the main destination for the export of Iraqi dates (40%) by the companies interviewed, followed by India (36%) and then Morocco (15%).
- The average price of exports generated by the surveyed companies was reported only for UAE and Morocco. The average export price to UAE was US$405/ton and to Morocco was US$500/ton
- The average selling price of dates at the local market was US$ 227/ton

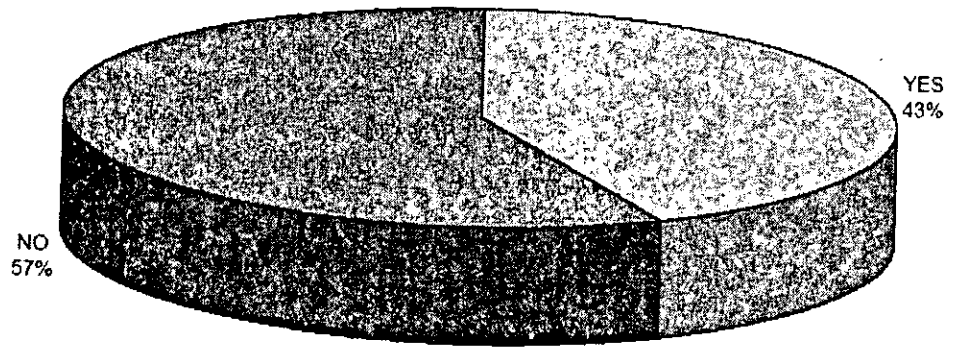
Figure 8 Major destination for exported Iraqi dates



8.1.3 Section C: Marketing Mechanisms adopted by the Company

- None of the interviewed companies apply any type of grades and/or standards in relation to the dates or to their marketing approach.
- Figure 9 shows that 3 out of the 7 marketers (43%) use a pre-contracting system with producers to secure their supplies of dates.
- None of the companies follow any type of sales campaign or promotion using modern information and telecommunication technologies and services.
- None of the companies hold seminars and workshops as a method of marketing.
- One firm out of seven marketers participated in local and international trade shows. This company participated in trade shows in Amman, Cairo, Dubai and Damascus during the last three years.
- None of the companies followed any other marketing techniques such as advertising in local and international newspapers or media, using posters in national and international fairs, mail shots and seminars, personal contacts at the local and the international levels or integration with other local companies.

Figure 9 The use of pre-contacting to secure supplies



8.1.4 Section D: Trade Performance Issues of Processed Dates

This section includes an analysis of trade performance issues of processed dates at local, regional and international levels. The level of processing of dates specified included fumigation and bulk packing in 10, 15 and 25 KG packs.

- Table 4 demonstrates that the interviewed companies sold an average of 15,415 ton annually during the period 2003-2006 to the local market at an average price of US$206/ton. It is worth mentioning here that the Shalchia processing plant in Baghdad sold a total of 45.5 thousand ton of dates in 2006 to the local market. (Shalchia is one of the major branches of the Iraqi Date Processing and Marketing Company (IDPMC), the major date exporting body in the country).
- The table also shows that regional exports have increased during 1992-2006. In 1992 15,000 tones of dates were exported regionally compared to 42,000 tons being the average volume of exports during 2003-2006 period.
- The average price of regional exports has increased changed significantly in the period 2002 – 2006 from US$355 to US$466 respectively.
- As indicated in the table, the only acknowledged exports were to the regional markets, mainly Dubai. It is also believed that there is a significant quantity exported to Dubai and also Iran that is not counted or acknowledged by COSIT.

Table 4 Trade performance of exported processed and packed dates during 1992-2006

Year	Local Market		Regional Exports		International Exports	
	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton
1992	-		15,000.00		-	
1993	-		15,000.00		-	
1994	-		16,000.00		-	
1995	-		20,000.00		-	
1996	-		45,000.00		-	
1997	5,848.00		47,000.00		-	
1998	4,761.00		50,000.00		-	
1999	5,715.00		50,000.00		-	
2000	4,008.00		30,000.00		-	
2001	3,623.00		50,000.00		-	
2002	11,457.00		44,000.00	350.00	-	-
2003	2,476.00	200.00	44,000.00	350.00	-	-
2004	11,471.00	225.00	22,000.00	433.33	-	-
2005	6,221.00	200.00	52,500.00	433.33	-	-
2006	45,452.00	200.00	47,100.00	466.67	-	-
Average (2003-2006)	**15,415.40**	**206.25**	**41,920.00**	**406.67**	**-**	**-**

- None of the companies exported date syrup during the last 15 years.

- None of the companies exported date vinegar during the last 15 years.
- None of the companies exported alcohol during the last 15 years.
- Table 5 shows that for the companies surveyed, the UAE is the main destination of Iraqi-exported dates. The interviewed companies reported that in 2005 and 2006, the total amount of exported dates to UAE reached to 48 thousand ton and 43 thousand ton, respectively. The average export price during the last four years was US$400/ton.
- None of the interviewed firms has imported any dates from abroad for processing or reselling at the local markets.

Table 5 Exported processed and packed dates by destination during 1992-2006

Year	UAE/Dubai					
	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton
1992	19,000.00				-	
1993	-				-	
1994	-				-	
1995	-				-	
1996	25,000.00				-	
1997	25,000.00				-	
1998	25,000.00				-	
1999	20,000.00				-	
2000	-				-	
2001	15,000.00				-	
2002	12,000.00				-	
2003	12,000.00	400.00			-	
2004	10,000.00	400.00			-	
2005	48,000.00	400.00			-	
2006	43,000.00	400.00			-	
Average (2003-2006)	25,000.00	400.00			-	-

8.1.5 Section E: Trade Performance Issues of Unprocessed (Raw) Dates

Table 6 below indicates that for the companies surveyed, the UAE is also the main destination for unprocessed dates. In 2006, a sum of 82 thousand ton of unprocessed dates were exported to UAE of which 45 thousand ton were from the Shalchia processing plant in Baghdad.

- The other market for unprocessed dates is Syria. Only small quantities of date exports to Syria have been reported.

- The table also shows that the average price of unprocessed dates to UAE market is US$171/ton which is much lower than the price of processed dates (US$405/ton). This situation calls for improving the infrastructure for processing and proper handling and packaging especially in the Shalchia processing facility. This action would value add to the cost of exported unprocessed dates.

Table 6 Exported unprocessed dates by destination during 1992-2006

Year	UAE/Dubai		Syria		?	
	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton
1992						
1993						
1994						
1995						
1996	25,000.00					
1997	25,000.00					
1998	25,000.00					
1999	20,000.00					
2000						
2001	18,623.00					
2002	23,457.00					
2003	14,476.00	125.00				
2004	21,471.00	112.50				
2005	47,721.00	225.00	500.00	225.00		
2006	81,922.00	225.00	500.00	225.00		
Average (2003-2006)	**37,809.40**	**171.88**	**500.00**	**225.00**		

8.1.6 Section F: Processed Dates by Variety

Table 7 demonstrates the quantities of raw date used for direct consumption year round and the quantities used for export and processing distributed by date variety.

Table 7 Quantities and prices of raw dates purchased for processing from the different varieties in 2006

Year	Annual purchase of raw dates		Annual exports		Annual sales in local market	
	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton	Quantity ton	Price US$/ton
Zahdi	31,000.00	250.00	30,000.00	500.00	-	
Khestawi	10,250.00	310.00	7,050.00	533.00	3,000.00	250.00
Sayer						
Khadrawi						
Hallawi						
Dayeri						
Other varieties (1)	75.00	400.00				
Other varieties (2)	25.00	500.00				
Other varieties (3)	25.00	500.00				
Other varieties (4)	25.00	500.00				

8.1.7 Section G: Identification of the main constraints

In this part of the questionnaire, the marketers were asked to identify the main constraints facing the Iraqi date industry. They identified what they considered to be the main problems. Many of these related to the impact on the export of dates to regional and international markets. The constraints identified were as follows:

- Lack of financial resources for building storage facilities
- Diseases affecting date palm trees
- Security issues
- High transport cost
- Closure of borders
- High taxes by some importing countries
- Tough competitiveness of markets
- Lack of high quality packaging material

8.1.8 Section H: Identification of Training Needs

Training is a critical aspect to development of a robust industry. The interviewees were asked to identify the most needed training skills, related to the marketing of dates, necessary to boost the industry. The following summarizes those areas considered to be of most importance:

- General marketing courses
- International marketing – marketing approaches, international trade shows, *etc.*
- Laboratory management and operations
- International standards and accreditation
- International Food Safety Requirements

8.2 Manufacturers' (processors') questionnaire analysis

The processors' questionnaire consisted of ten sections covering the following issues:

Section A: Basic Data
Section B: Production Issues
Section C: Raw Materials Issues
Section D: Total Production Data
Section E: Storage Facilities
Section F: Management and Classification of the Workforce
Section G: Power Utilization
Section H: Factory buildings
Section I: Identification of the Main Constraints
Section J: Identification of Training Needs

8.2.1 Section A: Basic Data

Determining the total number of date manufacturing factories in Iraq is difficult, given the current situation in the country. During the Kick-off meeting COSIT representatives put forward a figure of 150 firms involved date manufacturing activities. COSIT defines manufacturers in terms of Large (Labour >30) Medium (Labour >10 and <30) and small (labour <10). The survey team found that according to these classifications there are a total of 10 large firms involved in manufacturing. However it is not clear how many medium and small firms exist. Currently many of the medium and small firms are inactive due to issues such as security, lack of, or high cost of, power and low returns.

According to COSIT's most recent survey (2005), of the 19,177 registered small firms (employing less than 10 workers), there are:

- 39 small registered establishment processing date syrup;
- No registrations for small date processing factories
- 67 small sweet factories registered, some using dates in their products;
- No alcohol factories registered.

The information provided to the team by COSIT's for small and medium firms was not definitive and was not able to be used to clearly identify all the locations or numbers of medium and small firms.

While the team was able to visit all the larger factories and some medium-sized factories when they tried to visit the small factories they found most were not functioning due to the reasons mentioned above.

During the survey, the team was able to visit twenty nine production facilities in the five major date production cities in Iraq. A list of those processors surveyed and their location is provided in Appendix E.

The largest number of questionnaires was completed in Basra due to the concentration of date processing activities in this city (see Table 8.)

Table 8 Distribution of completed processors' questionnaires

Governorate	Frequency	Percent	Cumulative Percent
Baghdad	2	7	7
Basra	11	38	45
Diyala	2	7	52
Karbala	6	21	72
Al-Hillah	8	28	100
Total	29	100	

Table 9 shows that 50 percent of the owners/managers of the date processing plants surveyed hold a university degree. Of the other, 43 percent had completed secondary or middle school and 7 percent were illiterate.

Table 9 Distribution of educational levels of processing plant owners

Education Level	Frequency	Percent	Cumulative Percent
Illiterate	2	7	7
Middle school	11	39	46
Secondary	1	4	50
University	14	50	100
Total	28	100	
System	1		
	29		

Table 10 demonstrates that 76 percent of the interviewed date processors are from the private sector while the rest are jointly owned by the public and private sectors.

Table 10 Distribution of company's type of processing plants owners

Company type	Frequency	Percent	Cumulative Percent
Private	22	76	79
Combined	6	21	100
Total	28	97	
System	1	3	
	29	100	

Table 11 shows that 55 percent of the processors specialized in date production, 28 percent of the plants produce date syrup and 14% produce both syrup and vinegar. No alcohol production was reported.

Table 11 Distribution of company's activities by marketed products

Marketed products	Frequency	Percent	Cumulative Percent
Dates	16	55	57
Syrup	8	28	86
Syrup & Vinegar	4	14	100
Total	28	97	
System	1	3	
	29	100	

8.2.2 Section B: Production Issues

Table 11 details the Total production capacity in tonnes of each of the factories surveyed.

Table 11 Total production Capacity (Tonnes)

	Plant Name	Productive Capacity				
		dates	Syrup	Vinegar	Alcohol	Nawa (seeds)
1	Al-Mossoi Dates compressor	650				141
2	Al- hadi syrup factory		365			
3	Al-Basra dates and palms compressor	1000	-			150
4	The Iraq date processing and marketing company	7300				
5	The Iraqi company for manufacturing dates- Karbala'	50000				
6	Dejla syrup factory	2190				
7	Al-Badawea dates compressor	650				
8	The Iraqi company for manufacturing dates- Babel	3650				
9	Ishtar dates compressor	1500				270
10	Al-Baraka syrup factory	1460				

11	Al-Baraka syrup factory		75	180		
12	The Iraq date processing and marketing company - Bakoba compressor	7000				
13	Al-Rabah syrup factory	1825				
14	A-Bader syrup and vinegar factory		365	30		
15	Al-Forat dates compressor	5000				180
16	Babel's lion syrup factory		350	5		
17	home made dates"					
18	Al-Nahrain and Safa dates factory	4380				
19	Al-zalal syrup factory	1825				
20	The Iraqi company for manufacturing dates-Basra branch	500				
21	Al-safa' syrup factory		150			
22	Al-Waha dates compressor	5000				100
23	Al-wala' syrup and vinegar factory					
24	Al-taf vinegar factory			50		
25	Al-Kawthat syrup factory	3650				
26	Al-Mass dates compressor	500				
27	Al-Mosafer dates compressor	1000				180
28	Al-Sahel dates compressor	500				
29	Al-Basra new dates compressor	650				120
	Total	**100230**	**1305**	**265**	**0**	**1141**

Table 12 provides a summary comparison between the production capacity (designed capacity) and the actual production of the surveyed plants.

Table 12 Production capacity (designed vs. actual) in tons

Product type	Design capacity	Actual capacity	Utilization ratio
Date	100,230.00	29,781.00	30%
Syrup	1,305.00	640.00	49%
Seeds (Nawa)	1,141.00	962.00	84%
Vinegar	265.00	17.00	6%
Alcohol	0	0	0%

It is clear from the table that the design capacities of the plants are underutilized for all products especially dates. This is mainly due to inefficiencies in the machinery and equipment as a result of lack of spare parts and proper maintenance, and the current security situation. To increase Iraq's exports of dates and date products and to raise

its sector value, the utilization ratio should be increased, accompanied by a significant improvement in the quality and the handling of date products

Table 13 shows the distribution of the origin of equipment in the processing plants.

Table 13 Distribution of the equipment by origin

Origin of equipment	Frequency	Percent	Cumulative Percent
Local	21	72.4	77.8
Imported	5	17.2	96.3
Both (local & imp)	1	3.4	100.0
Total	27	93.1	100.0
System	2	6.9	
	29	100.0	

Seventy two percent of the plants are equipped with local machinery and seventeen percent are equipped with imported equipment. The origins of the imported equipments include: Italy, East Germany, France, China, Iran and India. For instance, eight date production lines are imported of which 4 are made in East Germany 3 in Italy and 1 in Iran.

Table 14 Details the Year of manufacture of the equipment available in each of the factories surveyed

Table 14. Manufacture year of equipment in the surveyed factories

	Plant Name	Year
1	Al-Mossoi Dates compressor	2000 & 2006
2	Al- hadi syrup factory	N/A
3	Al-Basra dates and palms compressor	1985
4	The Iraq date processing and marketing company - Baghdad	1979
5	The Iraq date processing and marketing company - Karbala'	1960 & 1970
6	Dejla syrup factory	N/A
7	Al-Badawea dates compressor	2002
8	The Iraqi company for manufacturing dates- Babel	1961
9	Ishtar dates compressor	2006 & 2007
10	Al-Baraka syrup factory	N/A
11	Al-Baraka syrup factory	1960
12	The Iraq date processing and marketing company - Bakoba	1961
13	Al-Rabah syrup factory	1960
14	A-Bader syrup and vinegar factory	1960
15	Al-Forat dates compressor	1995
16	Babel's lion syrup factory	1985

17	home made dates"	N/A
18	Al-Nahrain and Safa dates factory	Modernized yearly
19	Al-zalal syrup factory	N/A
20	The Iraq date processing and marketing company - Basra	N/A
21	Al-safa' syrup factory	2001
22	Al-Waha dates compressor	1965
23	Al-wala' syrup and vinegar factory	N/A
24	Al-taf vinegar factory	N/A
25	Al-Kawthat syrup factory	N/A
26	Al-Mass dates compressor	1995
27	Al-Mosafer dates compressor	1982
28	Al-Sahel dates compressor	1965
29	Al-Basra new dates compressor	1966

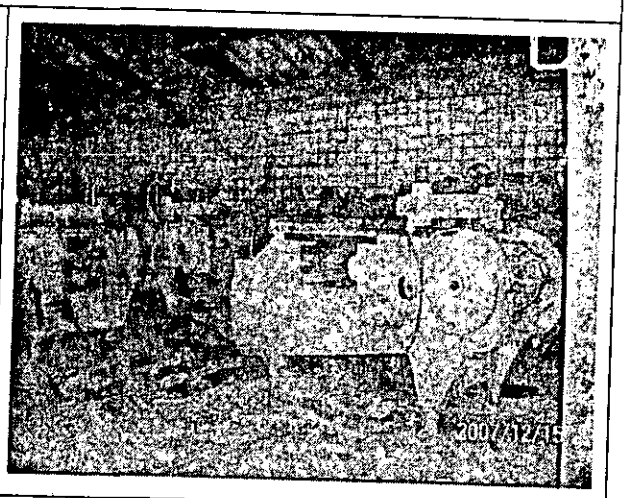
Table 15. Summarises the distribution of equipment by year of manufacture. .

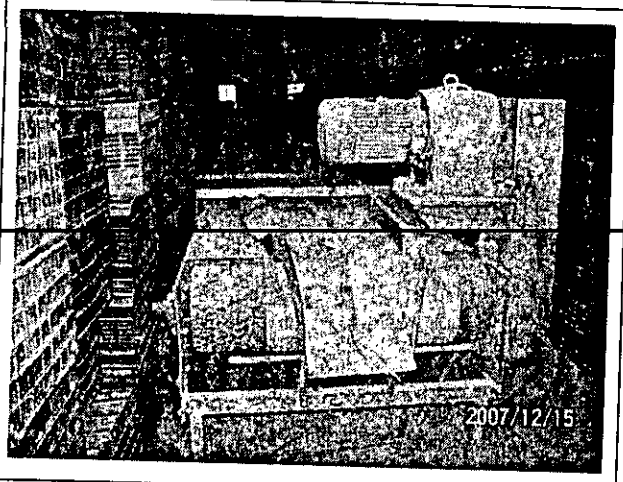
Table 15 Distribution of equipment by year of manufacturing

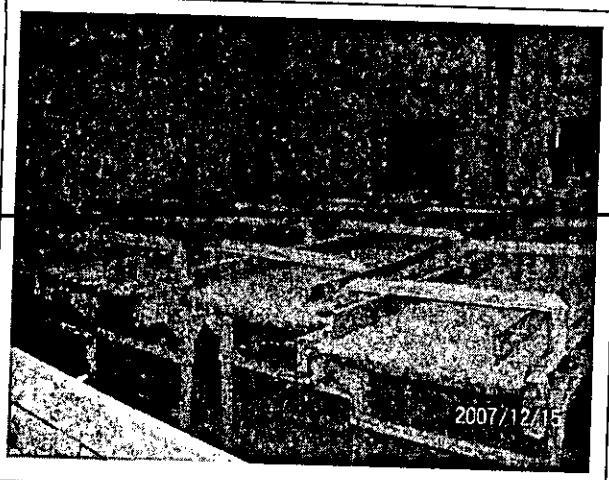
Year when equipment was manufactured	Frequency	Percent
After the year 2000	5	25%
1990-2000	2	10%
1980-1990	3	15%
1970-1980	1	5%
Older than 1970	9	45%
	20	100%

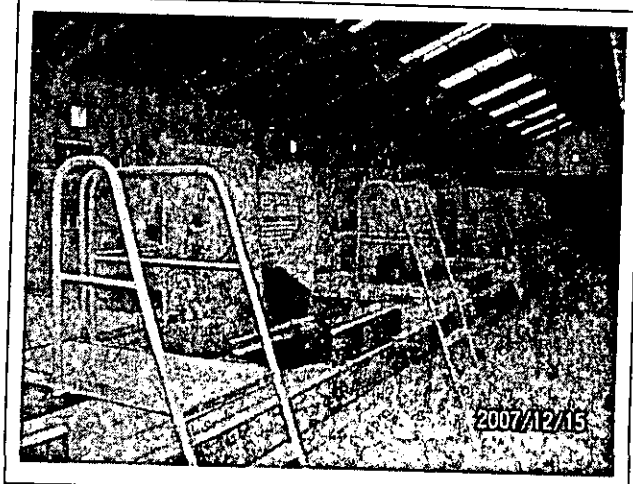
Table 15 shows that almost one half of the equipment in the surveyed plants is more than 30 years old. Just 25 percent of the equipment has been installed after 2000. This calls for a serious renovation of the currently installed equipment to meet the requirement of export-oriented products

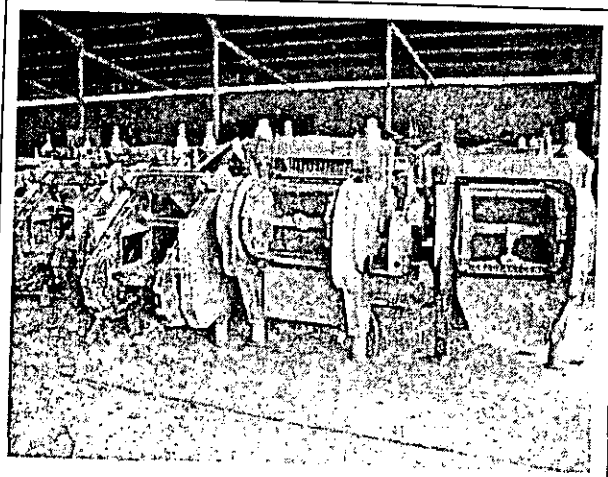
Current status of the production facilities at some of the processing plants owned by the Iraq Date Processing and Marketing Company in Baghdad.











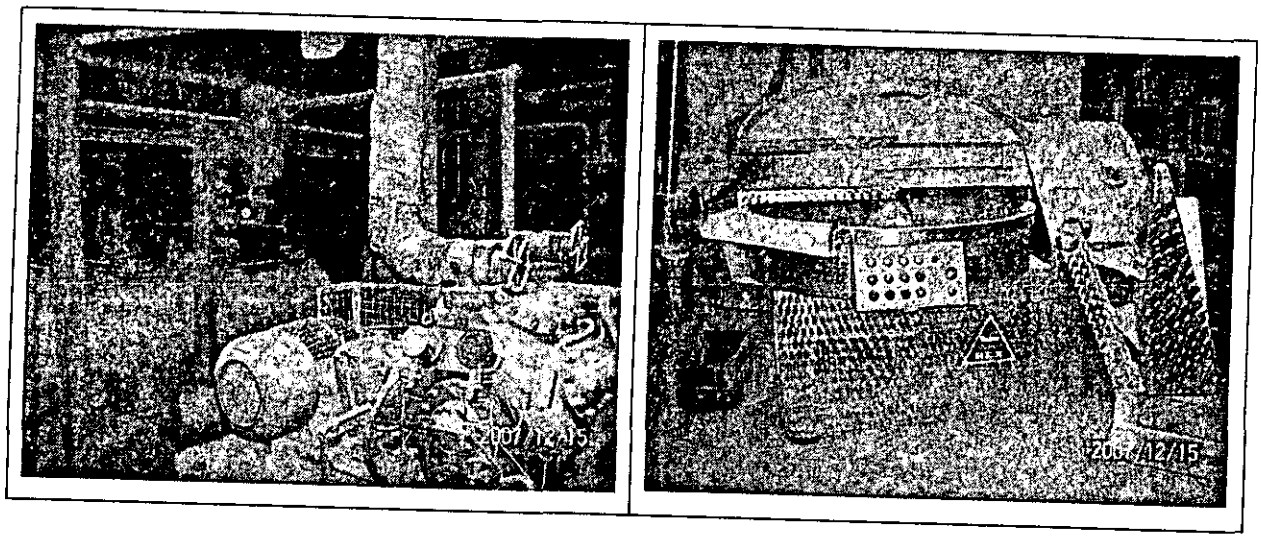


Table 16 shows the distribution of the type of processing equipment, production and packaging lines by level of automation. The table shows that 50 percent of date processing equipment is fully automated while the other half is manually operated. In the case of syrup production, seventy percent of the equipment is half automated. The majority of the vinegar equipment is manually operated.

Table 16 Distribution of equipment by level of automation

Product	Full-auto	Half -auto	Manual	Total
Dates	2	0	2	4
Syrup	2	5	0	7
Vinegar	2	1	13	16

8.2.3 Section C: Raw Materials Issues

Table 17 shows the number of working days (WD) per type of production (WD/year) as an average of the last 4 years. The 17 date plants worked an average of 160 days per the year, while syrup processing plants worked an average of 187 days per year.

Table 17 Number of Working Days Per Type of Production

Description	Plants	Minimum	Maximum	Mean
Number of workdays of DATE production (workdays / a year) -an average of the last four years	17	0	270	160

Number of workdays of SYRUP production (workdays / a year) -an average of the last four years	9	120	300	187
Number of workdays of VINEGAR production (workdays / a year) -an average of the last four years	2	250	365	308
Number of workdays of ALCOHOL production (workdays / a year) -an average of the last four years	0			
Number of workdays of NAWA production (workdays / a year) -an average of the last four years	0			

With regards to the quality and quantity of purchased dates for processing (average of 2005-2006) in tons per each grade, the surveyed plants purchased:

- 31,335 tons of grade 1
- 1,870 tons of grade 2; and
- 7 tons of grade 3

(The various grades being are based on factors such as colour, uniformity of size, absence of defects, etc). This indicates that some of these companies purchase dates based on grades but they don't sell or market by grade.

Table 18: Prices of purchased dates for processing (2003-2006)in Iraqi Dinars/ tons per grade.

Year	Grade 1 (ID/ton)	Grade 2(ID/ton)	Grade 3(ID/ton)
2003	264,500.000	208,358.330	160,000.000
2004	279,857.140	200,018.750	200,000.000
2005	292,333.330	207,165.710	225,000.000
2006	296,500.000	207,165.710	250,000.000

The most common and significant method of collecting the raw materials from the farm is through traders. Traders, either independent or representing particular production facilities, buy the product from farmer and transport it to the production facility. Some of the larger production companies have their own transport which picks up product directly from the farmers.

A number of issues surrounding the collection and transport of raw products to the production facilities were identified. These included the issue of:

- security and its impact on the ability to freely move around the farming community;
- the cost of transport which was said to be increasing significantly;
- the quality of the existing infrastructure and its impact on transport reliability and dependability, with many of the vehicles used for the transport being old and in need of replacement or repair; and

- the state of repair of some of the access roads which in some cases made it difficult to reach farmers.

8.2.4 Section D: Total Production Data

This section provides detailed information on the volume of production of the different products during the last decade (1997-2006). Table 19 shows that the production of packed dates has increased in the last two years and the production of syrup is decreasing markedly.

Table 19: Production of processed/packaged of dates and other products per year for the last 10 years

Year	Production per type of products (tons)			
	Packed Dates	Syrup	Vinegar	Others (Nawa)
1997	7,420	6,057	-	32
1998	7,955	5,757	-	32
1999	8,160	5,819	-	32
2000	9,530	5,198	-	37
2001	8,629	5,549	-	36
2002	9,320	3,449	-	41
2003	4,702	859	-	22
2004	9,716	1,852	-	27
2005	24,373	2,714	-	212
2006	23,510	2,455	-	212

8.2.5 Section E: Storage Facilities

Those processors surveys had access to a total of 27 stores used for storing raw dates with a total capacity of 111,200 tons. Table 20 shows the current conditions of these stores classified into good, average and poor. (Good = Efficient operation, no repair necessary, low maintenance; Average = Operating, repairs required, maintenance required; Poor = inefficient operations, major repairs/ renovations required, high maintenance necessary) The classification of the current condition (good, average and poor) was based on the assessment of the owner and the general judgment of the enumerator (all enumerators are well experienced engineers). Conditions were also documented by photos for each facility (see below).

Table 20 Assessment of the current conditions of raw date storage facilities

Year of Construction	Frequency	Percent	Current condition		
			Good	Average	Poor
After the year 2000	2	7%		2	
1990-2000	6	22%	2	4	
1980-1990	5	19%		5	0
1970-1980	4	15%		2	2

Older than 1970	10	37%		7	3
	27	100%	2	20	5

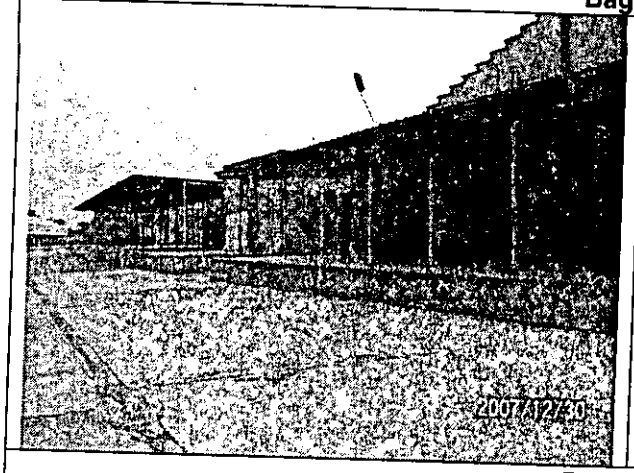
The survey shows that there are 14 stores used for storing processed dates with a capacity of 25,860 tons. Table 21 shows the current conditions of these stores.

Table 21 Assessment of the current conditions of processed date storage facilities

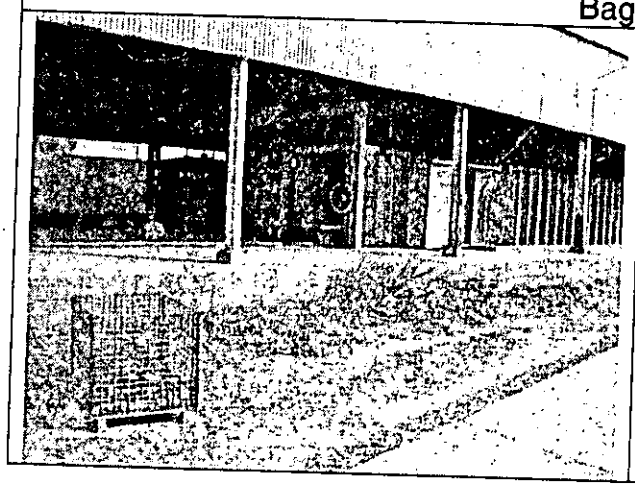
Year of Construction	Frequency	Percent	Current condition		
			Good	Average	Poor
After the year 2000	2	14%		2	
1990-2000	2	14%	1	1	
1980-1990	6	43%		4	2
1970-1980	0	0%		0	0
Older than 1970	4	29%		2	2
	14	100%	1	9	4

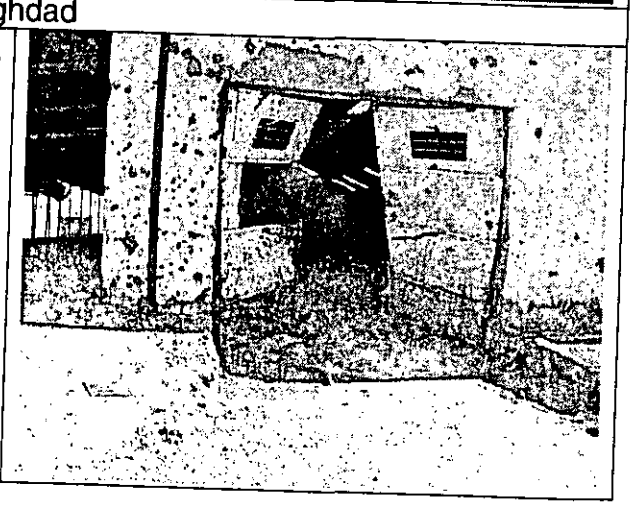
Current status of the storage facilities at some of the processing plants owned by the Iraq Date Processing and Marketing Company in Baghdad and Babel

Baghdad

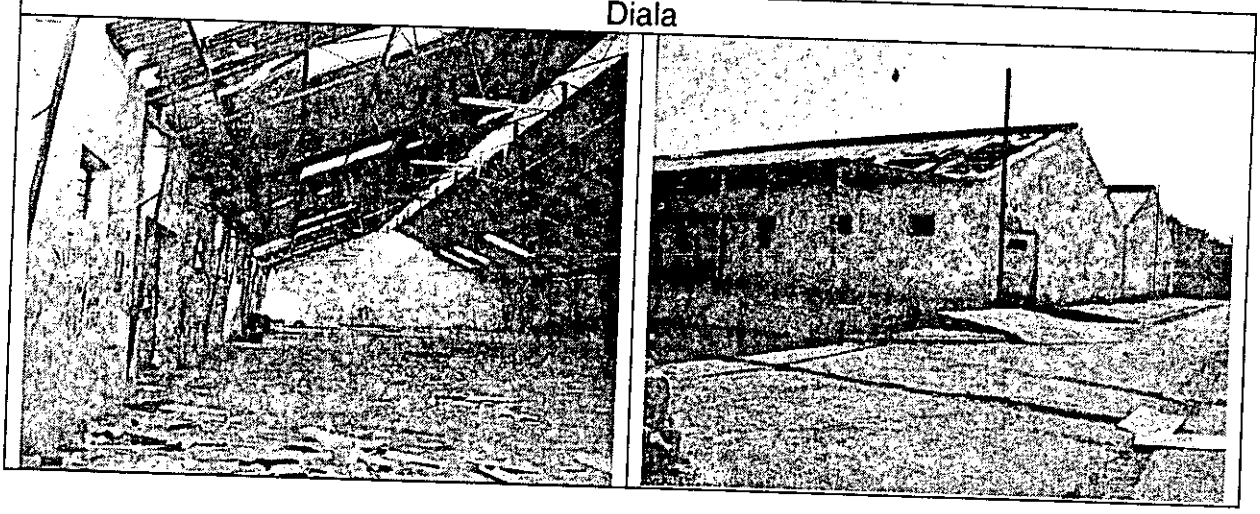


Baghdad





Diala

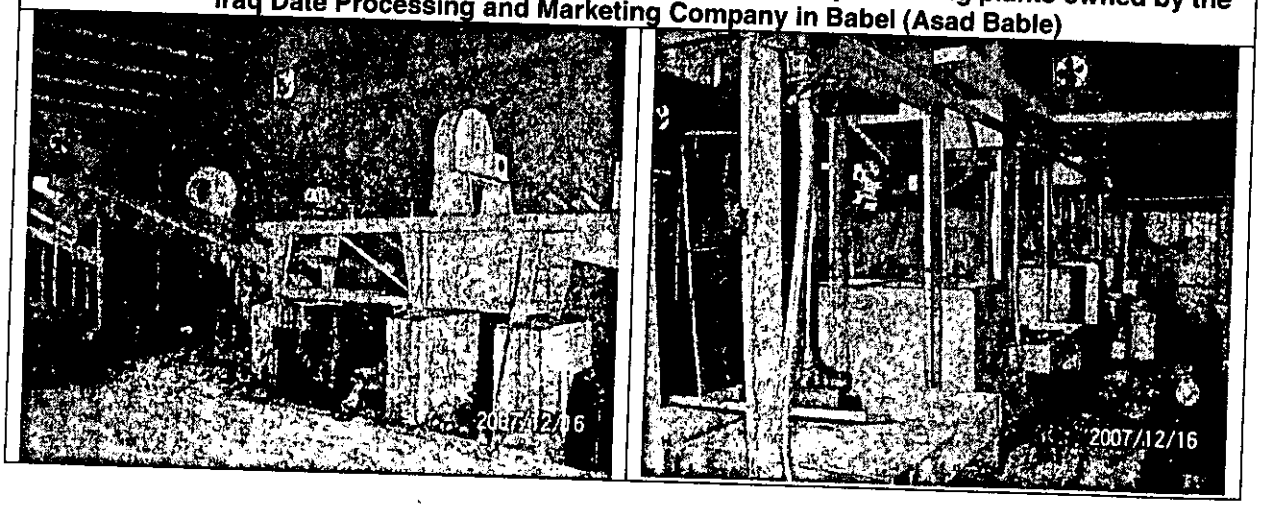


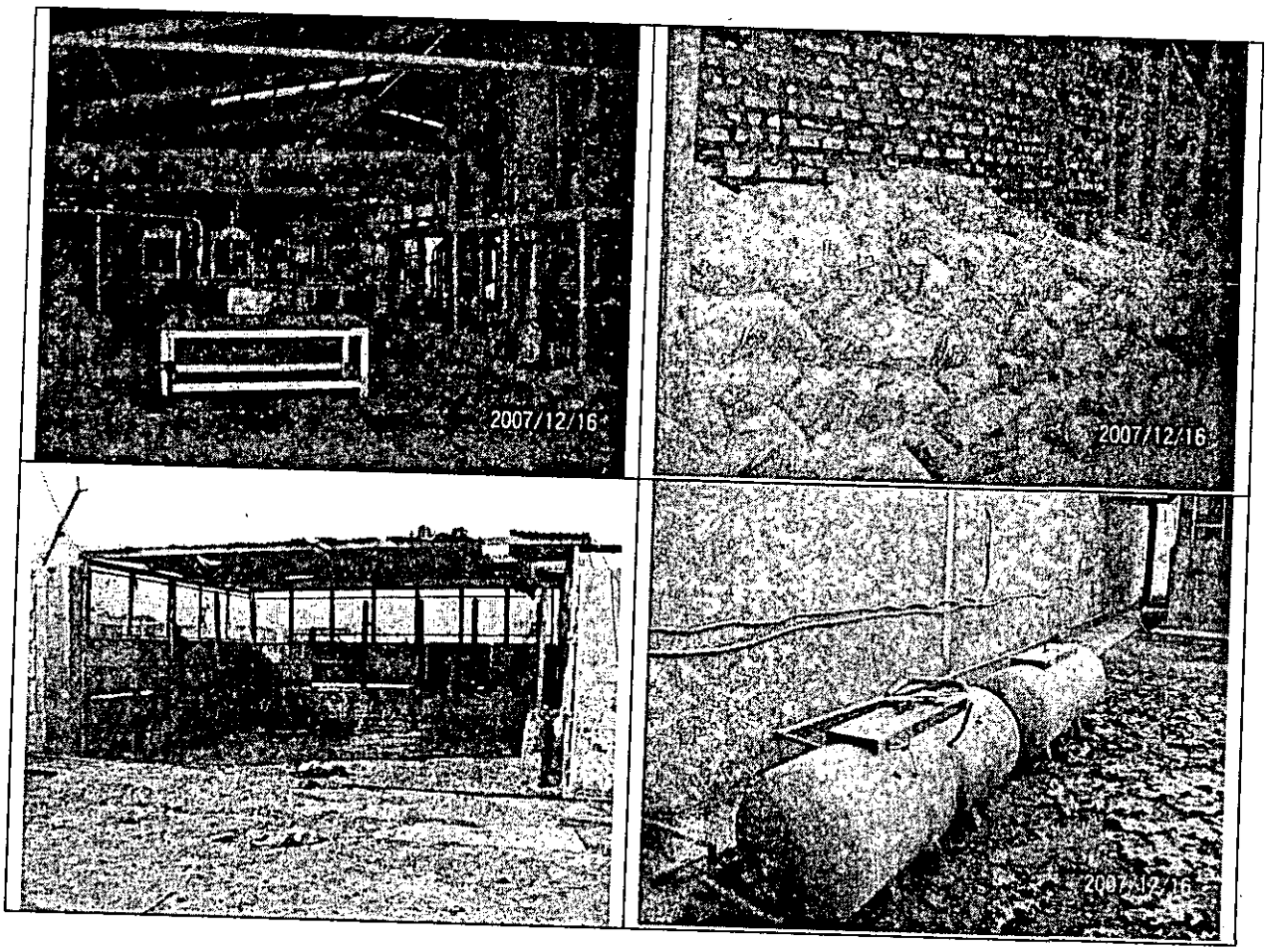
The survey shows that there are 9 stores in total owned by the interviewed firms, with a total capacity of 875 tons, which are used for storing syrup. Table 22 shows the current conditions of these stores.

Table 22 Assessment of the current conditions of syrup storage facilities

Year of Construction	Frequency	Percent	Current condition		
			Good	Average	Poor
After the year 2000	1	11%		1	
1990-2000	5	56%		5	
1980-1990	1	11%		1	
1970-1980	1	11%			1
Older than 1970	1	11%			1
	9	100%		7	2

Current status of the syrup production facilities at some of the processing plants owned by the Iraq Date Processing and Marketing Company in Babel (Asad Bable)





The survey shows that there are 8 stores in total used for storing the Nawa (seeds) with a capacity of 8,370 tons. Table 23 shows the current conditions of these stores.

Table 23 Assessment of the current conditions of Nawa (seeds) storage facilities

Year of Construction	Frequency	Percent	Current condition		
			Good	Average	Poor
After the year 2000	1	13%		1	
1990-2000	2	25%	1	1	
1980-1990	2	25%		1	1
1970-1980	0	0%			
Older than 1970	3	38%		1	2
	8	100%	1	4	3

- There are two stores used for storing vinegar.
- All date processors use methyl bromide gas to treat for infestations.

8.2.6 Section F: Management and Classification of the Workforce

- Strategic plans are an important management tool. Out of the ten firms who answered this questionnaire only four have strategic plans. However, only one firm follows its strategic plan.
- Marketing plans are also an important tool for managing the marketing activities of the firm. Out of the seven firms who answered this question, only three have marketing plans. However, only one firm out three followed the marketing plan.
- Asset management and maintenance system planning is another critical issue. Eight firms responded to this question of which only six follow a management/maintenance system plan.

Table 24: Number of Labour associated with each factory surveyed

Plant Name	Permanent Labor			Temporary Labor		
	Total	Male	Female	Total	Male	Female
Al-Mossoi Dates compressor	6	6	0	45	0	45
al- hadi syrup factory	6	6	0	6	6	0
Al-Basra dates and palms compressor	0	0	0	40	0	40
The Iraq date processing and marketing company	46	37	11	50	25	25
The Iraqi company for manufacturing dates- Karbala	17	17	0	30		30
Dejla syrup factory	0	0	0	10	10	0
Al-Badawea dates compressor	7	7	0	60	0	60
The Iraqi company for manufacturing dates- Babel	22	12	1	30	0	30
Ishtar dates compressor	7	7	0	60	30	30
Al-Baraka syrup factory	0	0	0	14	14	0
Al-Baraka syrup factory	18	18	0	0	0	0
the Iraqi company for manufacturing dates/ Bakuba compressor	22	20	2	50	25	25
Al-Rabah syrup factory	0	0	0	33	33	0
A-Bader syrup and vinegar factory	0	0	0	17	17	0
Al-Forat dates compressor	7	7	0	240	0	240
Babel's lion syrup factory	11	11	0	33	3	30
home made dates"	0	0	0	0	0	0
Al-Nahrain and Safa dates factory	0	0	0	37	37	0
Al-zalal syrup factory	0	0	0	13	13	0
The Iraqi company for manufacturing dates-Basra branch	12	12	0	30	0	30
Al-safa' syrup factory	0	0	0	0	0	0
Al-Waha dates compressor	0	0	0	7	7	0
Al-wala' syrup and vinegar factory	0	0	0	0	0	0
Al-taf vinegar factory	0	0	0	5	5	0
Al-Kawthat syrup factory	0	0	0	28	28	0
Al-Mass dates compressor	7	7	1	30	0	30
Al-Mosafer dates compressor	6	7	0	88	18	70

Al-Sahel dates compressor	3	3	0	30	0	30
Al-Basra new dates compressor	7	7	0	60	0	60

- Table 25 shows the number of permanent and temporary labourers in the 29 interviewed processing plants.
- The table shows that these processing plants employ a sum of 205 permanent staff of which 90 percent are males.
- Only 6 out of 29 processing plants have General Managers.
- The table also includes the number of all other key permanent personnel. It is noted that female participation at the management level is limited. The highest number of employed permanent females is in the worker category.
- The majority of employees at the management level have university degrees while many of the technicians have high school degrees.

Table 25 Number of permanent labourers distributed by gender

Job Description	Number	Male	Female
General Manager	6	6	0
Production Manager	13	11	2
Maintenance Manager	14	11	0
Marketing Manager	11	10	1
Director	9	8	0
Manager	4	2	1
Manager	6	3	0
Sellers	19	18	2
Technicians	35	36	1
Guards	60	60	0
Drivers	13	13	0
Workers	14	6	8

- Table 26 shows the number of the temporary labourers in the 29 processing plants. The table shows that the processing plants employ a sum of 1,040 temporary staff of which 75 percent are females.
- The table also includes the number of all other key temporary labourers. It is noted that the majority of the temporary labourers employed are workers and technicians. The majority of workers hold middle school degrees and few are illiterate.

Table 26 Number of temporary labourers distributed by gender

Job Description	Number	Male	Female
General Manager	0	0	0
Production Manager	1	1	0
Maintenance Manager	0	0	0
Marketing Manager	0	0	0
Director	1	1	0
Manager	1	1	0
Manager	2	2	0
Sellers	0	0	0
Technicians	149	149	0
Guards	22	22	0
Drivers	0	0	0
Workers	865	90	775

8.2.7 Section G: Power Utilization

Table 27 shows the share of power consumption obtained from the grid. The maximum amount of power supplied by the grid was 25 percent. However, the majority of the plants depend on private power generators.

Table 27 Share of the grid in the total power consumption

% of Grid	Frequency	Percent	Cumulative Percent
0%	1	4%	4%
10%	9	36%	40%
20%	11	44%	84%
25%	4	16%	100%
Total	25	100%	

- The total daily power requirement by all interviewed plants is 1,640 KW.
- The daily power obtained from the grid (average of 2005-2006) is 465 KW representing 28 percent of the total power needs.
- Daily power generated by local generators (average of 2005-2006) is 1,249 KW representing 76 percent of the total power requirement.
- The total number of generators owned by the interviewed plants is 39 capable to generating a sum of 4,135 KW.

8.2.8 Section H: Factory buildings

- The total number of buildings on the site of the plants owned by the surveyed processing plants is 141.
- The total number of buildings off- site of the plants owned by the surveyed processing plants is 33.

- The classification of the buildings on the site of the plant according to utilization:

  - Office 30
  - Production facility 39
  - Storage facility 36
  - Others 36

- The classification of the buildings off-site of the plant :

  - Office 0
  - Production facility 6
  - Storage facility 5
  - Others 22

- Current conditions of the office buildings (30 buildings). The classification of the current condition was based on the assessment of the owner and the general judgment of the enumerator (all enumerators are well experienced engineers) which was also documented by photos for each facility.

  - Good condition 13%
  - Average condition 83%
  - Poor condition 03%

- Current conditions of production facilities buildings (39 buildings)

  - Good condition 18%
  - Average condition 64%
  - Poor condition 18%

- Current conditions of storage facilities buildings (36 buildings)

  - Good condition 17%
  - Average condition 69%
  - Poor condition 14%

- Total space of the current facilities measured in square metres of the different types:

  - Office 8,312
  - Production facility 70,393
  - Storage facility 56,475

8.2.9 Section I: Identification of the Main Constraints negatively affecting the industry

The managers interviewed at the processing plants identified many constraints. These were classified into the following categories: those related to production, marketing and asset management and maintenance. The constraints are listed based on the frequency with which people mentioned them. For instance, lack of power received from the grid was the most frequent problem reported by all interviewees:

8.2.9.1 Constraints related to Production issues:

- Insufficient power from the grid
- Security conditions
- Continuous failure of the equipment
- Very old equipment and machines
- Unavailability of skilled and unskilled labourers
- Instability of reliance on using a seasonal workforce
- Inefficiency of packing and processing materials
- Insufficient fuel to operate generators and other machinery
- Hard to get packing materials
- Instability and lack of date markets
- Lack of special equipments to treat wastewater
- Limited storage capacity
- High salaries of the employees
- Lack of support materials
- Diseases attacking palm trees
- Lack of qualified staff
- Lack of access to training & skill development opportunity
- Very old buildings and facilities for production and storage
- Lack of financial support and resources
- Lack of skilled and qualified labourers
- Lack of transport facilities and very old fleet
- Need to upgrade the current manual-production system into automated-production system

8.2.9.2 Constraints related to Marketing issues:

- International export markets were lost in 1990
- Power outage and usage of generators
- Inefficient labour force
- Security conditions

- High transport and shipping costs
- Export business needs lots of paper work
- Bureaucracy (papers have to be signed from the headquarters)
- Unavailability of auto packaging machines
- No cooperation across the regional and international markets
- Non-existent specialized marketing centres
- Need to explore new export markets
- Current marketing practices are primitive and naive
- Market is monopolized by a few traders
- Low quality of dates due to palm diseases

8.2.9.3 Constraints related to Asset Management / Maintenance issues:

- Limited financial resources to maintain the assets
- Centralized decision making process. All decisions have to be taken at headquarters
- Limited financial resources to upgrade the equipment such as compressor and refrigeration needed to preserve stored date product in good condition
- Problems related to the lack of processing materials
- Lots of repairs to equipment and plant needed

8.2.10 Section J: Identification of Training Needs

The identified training needs in this section are classified into the following categories:

8.2.10.1 Training needs related to Production issues (including maintenance)

- Technicians need to be trained on new equipment and machinery
- Maintenance training
- Food Safety
- Total Quality Management, ISO, HACCP and Food Safety

8.2.10.2 Training needs related to Marketing issues

- There is an immense need to train workers on marketing and packaging
- Training on how to participate in international exhibitions
- Identification of new international markets
- Training employers in upgraded laboratories (standards)
- Comprehensive marketing courses
- Training on proper post-harvest handling techniques of the dates

9 CONCLUSIONS FROM THE SURVEY

The world date industry continues to grow with world production of increasing 250% since 1980. The international demand for dates remains solid with export markets projected to continue to grow by around 5% per year. However, while the majority of the world's date industry continues to expand, Iraq's industry is stagnating and continuing to lose its position as a world leader in date production and marketing.

At the kick-off meeting, Iraqi participants from the Ministry's of Trade and Agriculture together with staff from Iraqi Date Processing and Marketing Company detailed many of the issues which they considered currently affected the Iraqi date industry. They cited issues such as:

- the need for rehabilitation of the many facilities which have been destroyed or damaged as a result of hostilities or that have just fallen into disrepair due to an inability to keep them maintained in the current circumstances;
- the fact that much of the equipment is old and in disrepair, with the industry lacking the financial resources and access's to spare parts needed to restore them to their full potential;
- the loss of markets as a result of an inability to adequately service those markets and as a result an increase in competition from neighbouring and regional countries;
- the need for training and skill development for management, marketing, technical and operational personnel on the factory floor;
- the reliance on poor and unreliable transport;
- problems associated with the reliability of electricity from the main grid ;
- the level of staff turnover as a result of the ongoing security issues and low salaries;
- the lack of skills and understanding of food safety and quality standards and their application in processing and marketing; and
- the lack of supporting government legislation and regulations.

The data obtained through the survey supports all these observations and more, providing qualitative and qualitative evidence of what is already known by those involved with the date industry in Iraq.

9.1 Marketing

Iraq was once the largest exporter of dates is now ranked number six behind Iran, UAE, Pakistan, Tunisia and Saudi Arabia. The country is not recognising the true

value of its production and is realising low prices both in the local and export markets. It would appear that competitors are taking advantage of Iraq's current situation, and the resultant impacts on Iraq's industry, by buying Iraq's dates cheaply, value adding to them through processing and packaging and then on-selling them at significant price margins. The UAE, for example, while ranked well below Iraq as the date producer, is one of the largest date exporters in the world, with many of these dates being shipped from Iraq in raw form for processing and packaging in the UAE. While the situation is understandable given the impacts of ongoing hostilities, Iraq, the once world industry leader, can only be saddened and frustrated at its inability to again realise its full potential.

The modalities of processed date marketing depend on the targeted clients at both local and international markets. At any level the marketing modality is highly dependent on the product itself, price, promotion, and placement. The current Iraqi dates products in terms of quality and presentation at both local and regional level is poor. As a result, the price of the Iraqi product which is a process determined by supply and demand forces, is very low compared to other competing products. Promotion, which refers to the various methods of promoting the product, brand, or company, is absent due to the critical conditions in the county. The last factor affecting the modality of any marketing is the "Placement or distribution" which is a method that ensures that the product reaches the marketplace. As indicated earlier, the current critical situation is also preventing the Iraqi dates from reaching marketing places where the product can be sold.

The survey highlights many other issues impacting on the industry's ability to market its product successfully both domestically, regionally and internationally. Management and marketing staff highlighted issues across the full spectrum of activities associated with the marketing of dates, including the lack of acknowledgement of grades and standards, the lack of the development and commitment to implementation of marketing strategies, limited to no market awareness and promotional activities, poor packaging, high cost and unreliable transport, poor border control, a lack of adequate skilled labour, a lack of access to marketing resources and materials, etc.

9.2 Processing

Like the current status of date marketing in Iraq, the date processing industry is similarly reeling from the ongoing effects of insecurity and hostilities. Most processing facilities are damaged or are in poor repair. Much of the current machinery surveyed was old and/or in the state of disrepair and, as a result of this and the general state of the industry, much of the available equipment is underutilised. Similarly stores used for storing production are generally in average to poor condition most requiring some renovation and with a significant 18% of those surveyed requiring major renovation.

The situation is compounded through a lack of availability of finance to undertake the necessary renovations and repairs and by the lack of availability of materials and spare parts.

9.2.1 Selection of the appropriate industry for the rehabilitation

The terms of reference for the study requires a recommendation as to the selection of appropriate production facility for rehabilitation as a model for development. Selection of the preferred facility had to be undertaken in consultation with MOT and the directorate of dates processing and marketing and the CTA.

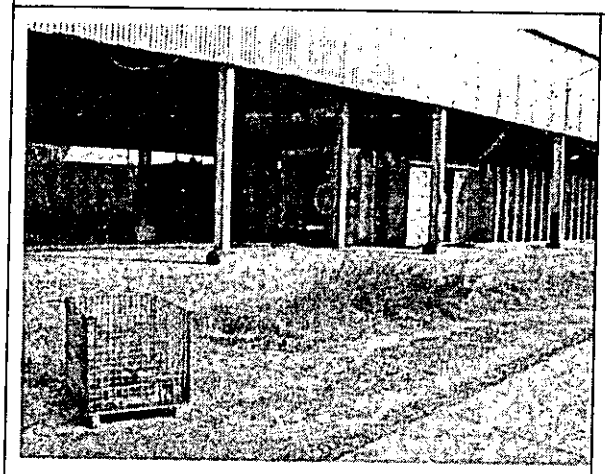
In developing a recommendation for which facility would be most appropriate to rehabilitate, the team consider the number of factors including the impact of the security situation, ongoing operations, proximity to markets and to raw products, the current condition of the plant, access to management, technical staff and labour, the impact on servicing surrounding production farms and access to the plant during the rehabilitation process.

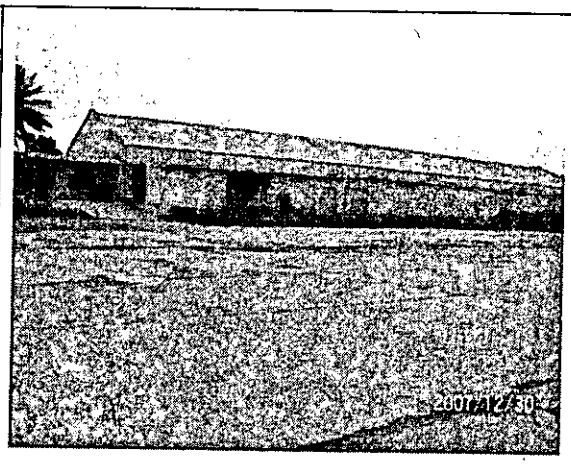
These elements were confirmed with key counterpart staff.

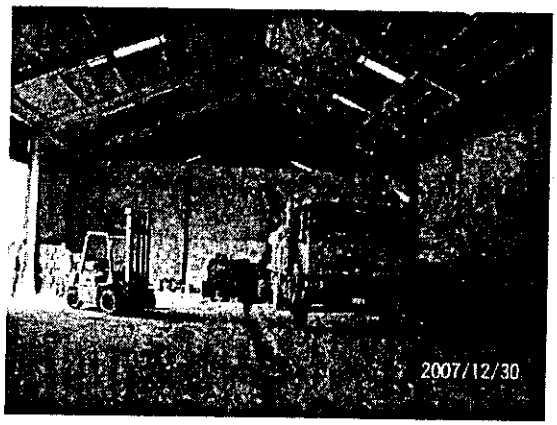
Given these criteria it is proposed that the most important plant to rehabilitate at this time is the Al Shalchia facility. The reasons for this are:

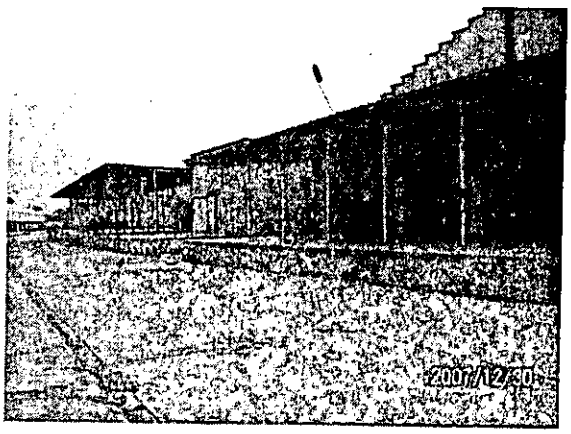
- The plant is in a significant date production area and so services and provides easy access for the collection and transport of dates from surrounding area.
- The plant is also close to Baghdad and there are many benefits flowing from this including access to markets, ease of transport, access to labour and technical support, security, etc.
- The plant itself is in poor condition. (Note the pictures following)
- There are already considerable existing technical capabilities and access to labour at the plant, which are not being utilised as they should given the status of the plant's condition.
- The facility at has been a prominent plant in the past and, given this prominence and its proximity to Baghdad, we feel its rehabilitation would be a good sign for the Iraqi people that the date industry is re-emerging.

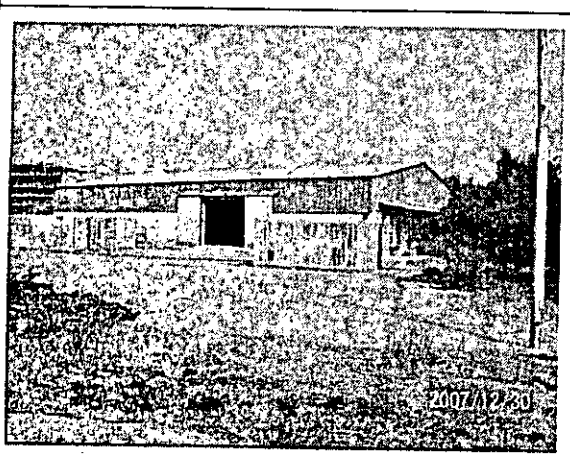
Current status of the production facilities at some of the processing plants owned by the Iraq Date Processing and Marketing Company in Baghdad

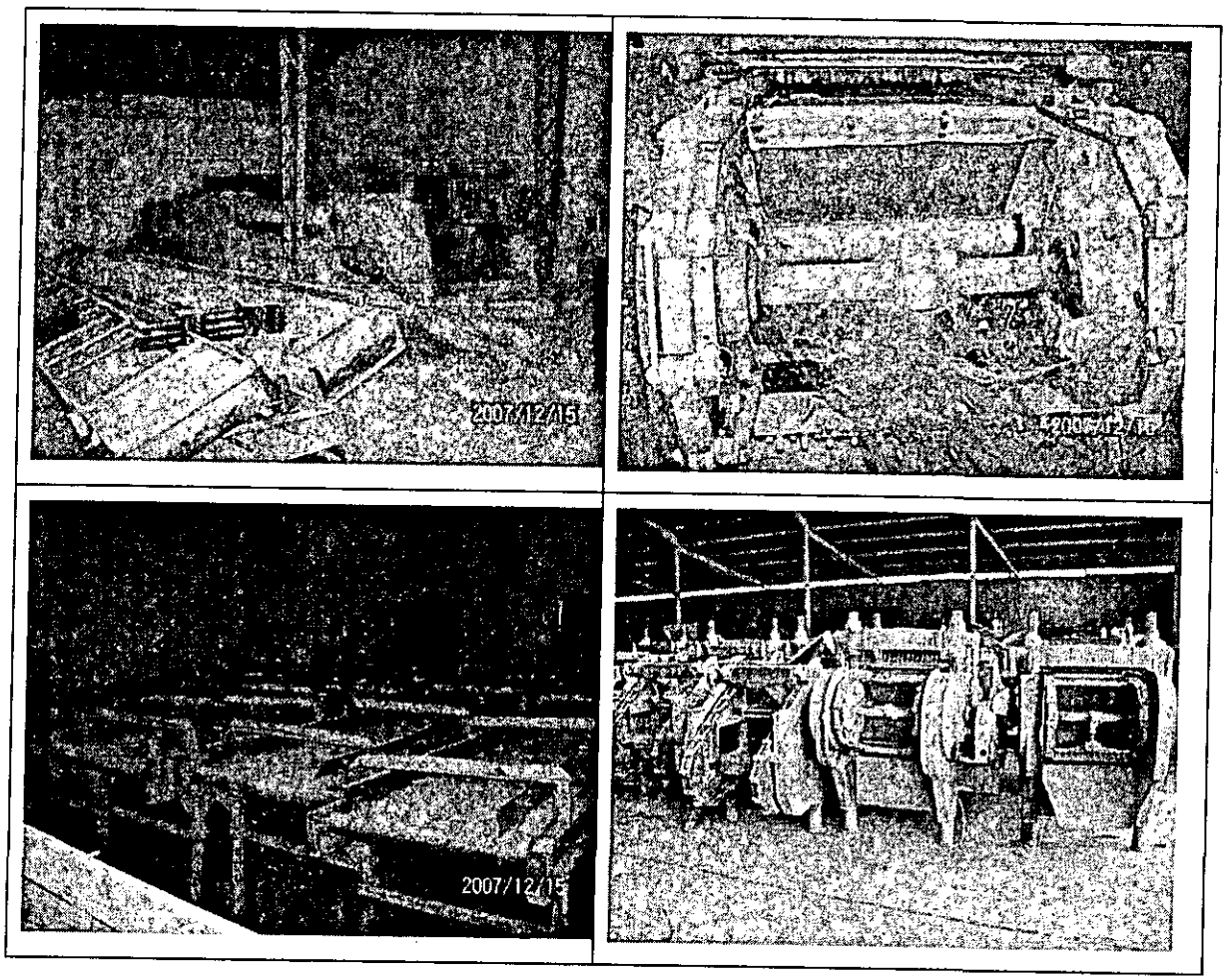












The General Director of the Iraqi Date Processing & Marketing Co, together with MOA and MOT officials also confirmed this selection and have confirmed their preference to UNIDO representatives. Appendix F includes a copy of relevant correspondence from the Director General.

The proposed rehabilitation of the Al Shalchia facility is expected to help contribute towards solving some of marketing related constraints as mentioned in section 8.1.7 above, at least in Baghdad area, through:

- The production of a high quality product that can more easily compete in both local and regional markets, hopefully alleviating some of the tough market challenges facing Iraqi date industry.
    - Improving handling procedures of date fruits, thus improving the quality and minimizing the losses due to processing
    - Improving packaging
- Demonstration of good production practice as a model for the rest of the industry with successes being mirrored by other processors in Baghdad as well as in the other parts of the country.

- Demonstration of success of this rehabilitation and its impact on the industry and markets, further reinforcing the potential of the industry which should encourage other investors and donor agencies to support the rehabilitation other date processing and production facilities;

9.3 Industry Strengths

While there are many negative factors affecting current marketing and processing of dates there exists a number of positive factors which, if supported, will contribute to rebuilding the industry. By far the most positive feature of the industry is the access to well educated and committed management and staff. The survey shows a high proportion existing management, marketing and technical personnel have been tertiary educated. Matched with this is the existence of established and committed operational staff. Given the current circumstances it would be easy to understand why such commitment may wane yet this does not seem to be the case. Likewise personnel from the associated government sector institutions, such as the Ministries of Trade and Agriculture and the Iraqi Date Processing and Marketing Company, are like-minded in their commitment to the industry as was demonstrated by participants at the kick-off meeting. Other positive factors include the continued strength of both regional and international markets which provide continued demand for Iraqi products. Iraqi dates are still recognised for their quality and taste characteristics and there is now greater opportunity of increasing the value of production through the development and marketing of high-quality product for markets such as Europe.

The survey demonstrated that there is a high proportion of locally sourced equipment currently being utilised in the processing industry. This confirms the level of existing technical capacity to be able to support the redevelopment and ongoing operations of the industry.

Finally Iraq continues to provide an ideal climate for the production of high-quality dates and this is something that other competitors will find difficult to mirror.

10 RECOMMENDATIONS

This aim of this report is to primarily provide information on the current status of the date processing and marketing sector in Iraq. The Iraqi Government, together with its partners in UNIDO and the FAO have already identified the need for a comprehensive program in support of the Iraqi date industry which will cover many aspects of production, processing and marketing that need to be addressed. This survey highlights and supports this need for a comprehensive program. No single focused project will be effective in achieving the desired outcomes of support to rebuilding the industry. Any program should be integrated and should attempt to address all aspects impacting negatively on the industry's ability to recover.

The survey highlights a broad range of initiatives which could be considered for support by government and donors. Examples include:

- In addition to the proposed model rehabilitation, support the upgrading of other public and private processing facilities to improve the quality of dates ready for

export and to allow for quicker to-market time (option may be to offer low-interest/ no interest loans for equipment purchasing to allow for an overhaul of production equipment);

- Ascertain whether Iraq should open up direct supply lines with export markets rather than seeing its product re-exported through countries such as the UAE and Iran;
- Support to the development and implementation of a regional and international marketing campaigns;
- Support to identification of niche export markets for date syrup and vinegar (currently only being sold domestically);
- The development of an 'Iraq date' brand for marketing purposes;
- Decentralisation of bureaucracy to allow independent and quick decision making by growers and producers;
- The provision of ongoing skill development for managers, marketers and technical across a range of related fields;
- The reinforcement of and support to the need for standards across production, processing and marketing and including farmer awareness of the need for and benefits of production of high-grade products;
- Incentivising the market and small suppliers to increase market competitiveness and weaken the power of the three major buyers; and
- Investing in improving the power supply and the grid to production facilities.

The survey also highlighted the fact that those Iraqis involved in the industry know what needs to be done to build the industry back to what it was. It's not as if Iraq is creating a new industry, the Iraqi people have already demonstrated their ability to build the most significant date industry in the world and there is no reason to think that, if they are given the necessary support and resources, that they can't rebuild the industry to its once prominent position. In this respect there should be minimal need for outside technical assistance, only where the specific expertise is not available internally, as there is already significant existing Iraqi expertise which can be used across program implementation.

One of the issues that are affecting the industry at the moment is access to and knowledge about regional and international markets, their competitors and first-hand knowledge of new marketing, processing and packaging approaches. It has been the experience of the consultant team, who has worked across the agricultural sector in Iraq since 2003, that many Iraqis have only recently had access to up-to-date information relevant to their particular industry/field, through sources such as the Internet, with many not been able to travel out of the country for study, exchanges, industry liaison or to attend workshops/seminars or international marketing and trade shows. Lack of access to such activities limits opportunity for personal growth and professional development which directly affects industry growth and development.

This trend has changed slightly over the past years with opportunities provided by donors such as UNIDO and FAO to undertake personal development activities and attend regional and international industry forums and trade shows. However there is still a broad-based need for such opportunity.

Given the industry has been significantly damaged over the past decades it will take sometime for it to rebuilt. Consideration should be given to or longer term program of support to the industry to assist it through the current difficult times and to allow it time to repair once the situation in Iraq stabilises. A one to two year program of support particularly in the areas of human capacity building, market access and facility rehabilitation, even with a significant budget, may not be adequate to provide the industry necessary leverage to get itself back on its feet. The longer term program utilising and supporting existing public sector and industry resources would have a better chance of providing the appropriate level of support necessary. The industry needs to be able to count on and plan for support over the medium term.

Appendix A
Terms of Reference

Appendix B
Kick-off Meeting Agenda

Appendix C
Minutes of the Kick-off Meeting

Appendix D
Survey Instruments

Appendix E
List of Processors Surveyed

Appendix E
List of Processors Surveyed

Appendix F
Letter of Support

Iraqi Date Processing & Marketing Co.
(Mixed Sector)

العراقية لتصنيع وتسويق التمور
ساهمة / مختلطة)

No: ..... العدد:

Date: ..... التاريخ:

Dept: .....

) المعمل في حالة سيئه جدا" وانه من المعامل الرائده في الفتره السابقه وقد صدر منه مئات الاطنان خارج العراق في ثمانيات القرن الماضي •

ولا ئه كان من المعامل الرائده فلابد من اعادة اعتباره •

واخيرا" سنعمل جاهدين من اجل اعادة التأهيل لكل المكابس الاخرى التي تحظى بأهمية كبيره في مجال انتاج التمور وخصوصا" في مدينة البصره •

••• وتشكرك •••

المدير المفوض
محمد سليمان حسن

— ٢ —

٢) هناك عدد من الكادر قد هاجر خارج العراق نظرا " للظروف التي مرت بالعراق خلال هذا الزمن •

لذلك فنحن بحاجه الى العمل الحثيث من اجل توفير كادر بعمر يستطيع ان ينتج وكذلك لابد من تدريب الكادر الموجود والذى سيأتي •

أن امكانيات منظمة الأمم المتحده ـ اليونيدو ـ كما ابلغونا لا تتعدى قدرتهم على تأهيل مكبس واحد فقط ونحن بدورنا نشكرهم على هذه الجهود المخلصه وبالمقابل نعمل جاهدين مع جهات دوليه عديده من اجل مساعدتنا على تأهيل المكابس الأخرى في شركتنا •

ولأن جهود الأمم المتحده ـ اليونيدو ـ هي اول الجهود الدوليه لمد يد العون لشركتنا في تأهيل أول مكبس • عليه ولأنهاء الخطوه الاولى في سير مقبله، فنحن قد اخترنا المكان الاكثر اهميه وليس الأفضل من باقي المكابس والأسباب التي دعتنا لأختيار هذا المكان هي :ـ

١) انه يوجد في منطقه حيويه لأنتاج التمور وتوفر الخدمات لجلب التمور والقيام بالمراحل الأوليه قبل التصنيع من نقل وخزن •

٢) انه يمكن ان يقدم المكبس تمور الى اسواق بغداد العاصمه •

٣) توفر الجانب الأمني وكذلك توفر الخدمات الأوليه في بغداد العاصمه عن باقي المدن العراقيه في الوقت الحاضر مثل المياه الصحيه وتوفر شبكة المجارى الغير متوفره في المدن الأخرى•

٤) توفر قابليات تكنيكيه من عمال وموظفين في مجال الانتاج والسيطره النوعيه والمخازن وهي متوفره في بغداد اكثر من غيرها •

Iraqi Date Processing & Marketing Co.
(Mixed Sector)

العراقية لتصنيع وتسويق التمور
(مساهمة / مختلطة)

No: ٢٤٦ العدد:

Date: ٢٠٠٨/٤/ التاريخ:

Dept: ..... سم:

٢٩

الدكتـــــور عامـــــر جبارين المحتـــــــرم

الموضوع/ المكبس النموذجي المقترح

وبعـــد :

مكالمتكم الهاتفيه معنا ورسالتكم الينا في يوم الثلاثاء ٢٢/٤/٢٠٠٨ بخصوص اختيار الذى تـم تحديده لانشاء المكبس النموذجى الذى ستقوم منظمة الاغم المتحده باستيراده لـ •

لقـد تـم مناقشـة الاسباب التى دفعتنا في ان يكون هذا المكبس في بغداد وفي مقر الكائن فى الجانب الغربى من وسط بغداد وقـد حصل الاتفاق مع كادر المنظمـــــه الشأن ولقناعتهم بالاسباب التى جعلتنا نفضل هذا المكان على غيره •

أن لدى الشركـه ثمانيـة مكابس موزعـه على فروع الشركه في بعقوبه وبغداد وبابـــل والبصره ، وأن جميع هذه المكابس لها اهميه واهتمام كبيرين من لدنا ونحن نعمل جاهدين ادة تشغيل هذه المكابس عدما نستطيع تأهيلها من حيث الاجهزه ومن حيث الكادر لقـد ا فـي تقاريرنا السابقة بأن الشركه بحاجه الى تحديث هذه المكابس للاسباب التاليـه :

على صعيد الاجهـزة

عدم ملائمتها للمستوى العالمي لتصنيع التمور•

التقادم الزمنـي الذى مر على هذه الاجهزه حيث ان استيراد اجهزة الكبس المحســـن الى العراق كان فى النصف الثاني من سبعينات القرن الماضي اى مض اكثر من ثلاثيـــن سنه على تلك الاجهزه •

عـدم وجود قطـع غيـار لتلك الاجهزه •

لى صعيد الكادر

هناك عدد كبير من الكادر الفني الزراعي والميكانيكي قد خرجوا من الشركه بحكم تقدم العمر •

List of Processors Surveyed

	Factory name	Governorate name	District Name	Profession of Data Giver
1	Al-Mossoi Dates compressor	2	Abo allkhaseeb Yosfan	Deputy of the compressor's owner
2	al- hadi syrup factory	3	Al-kales, alhowaish	laboratory owner
3	Al-Basra dates and palms compressor	2	Al-bea'j city	compressor owner
4	The Iraqi company for manufacture and marketing dates	1	Al-Kathemeia(Shalchia)	The technical director
5	The Iraqi company for manufacturing dates- Karbala'	4	Karbala'	branch manager
6	Dejla syrup factory	5	Al-Hela	the owner
7	Al-Badawea dates compressor	2	omar river	the manager
8	The Iraqi company for manufacturing dates- Babel	5	Al-Hela	branch manager
9	Ishtar dates compressor	2	Abo-Alkasseb	compressor owner
10	Al-Baraka syrup factory	5	Al-Hella	laboratory owner
11	Al-Baraka syrup factory	4	karbola'a	factory owner
12	the Iraqi company for manufacturing dates/ Ba'koba compressor	3	bs'koba	branch manager
13	Al-Rabah syrup factory	5	Al-Hela	factory owner
14	A-Bader syrup and vinegar factory	4	karbola'a	factory owner
15	Al-Forat dates compressor	2	Al-karnah	compressor owner
16	Babel's lion syrup factory	5	Al-hela	factory owner
17	"" home made dates"	1	Jamela area	
18	Al-Nahrain and Safa dates factory	4	karbola'a	factory owner
19	Al-zalal syrup factory	5	Al-Hela	factory owner
20	The Iraqi company for manufacturing dates-Basra branch	2	Basra	complex supervisor
21	Al-safa' syrup factory	5	Al-Hela	factory owner
22	Al-Waha dates compressor	2	abo alkaseeb hajran	compressor owner
23	Al-wala' syrup and vinegar factory	4	karbola'a	factory owner
24	Al-taf vinegar factory	4	karbola'a	factory owner
25	Al-Kawthat syrup factory	5	Al-Hela	factory owner
26	Al-Mass dates compressor	2	Al-Bea'aj	compressor owner
27	Al-Mosafer dates compressor	2	Al-Karnah	compressor owner
28	Al-Sahel dates compressor	2	Al-Haretha	compressor owner
29	Al-Basra new dates compressor	2	Abo-Alkaseeb	compressor owner

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UNIDO: Screening of Rev. 3 data - all data in national currency are in 1000s

Year	ISIC	EST	PER	EMP	FEM	WS	GO	VA	GFCF	WSEMP	VAEMP	WSVA	FWSVA	VAGO	FVAGO	FC
1999	15	1134	10072	9654	3980	120081	804111	252823	38705	12.4	26.2	47.5		31.4		
2000	15	1096	10219	9934	4248	122819	870710	272797	49088	12.4	27.5	45.0		31.3		
2001	15	1118	11454	11138	4820	142711	938581	297667	76021	12.8	26.7	47.9		31.7		
2002	15	1124	11900	11623	4889	157663	1010804	311522	53476	13.6	26.8	50.6		30.8		
2003	15	1131	12171	11877	5013	167983	1015958	323963	41676	14.1	27.3	51.9		31.9		
2004	15	1126	12408	12126	5181	177536	1070155	354743	53344	14.6	29.3	50.0		33.1		
2005	15	960	12637	12242	5459	191099	1113875	361866	57990	15.6	29.6	52.8		32.5		
2006	15A	966	12577	12178	5643	197567	1162500	392391	82756	16.2	32.2	50.3		33.8		
1999	16	4	257	257	137	6018	108407	79103	856	23.4	307.8	7.6		73.0		
2000	16	3	269	269	138	5667	116142	79242	673	21.1	294.6	7.2		68.2		
2001	16	3	286	286	113	6093	126392	84494	12104	21.3	295.4	7.2		66.9		
2002	16	3	304	304	155	6725	118146	87704	1276	22.1	288.5	7.7		74.2		
2003	16	3	297	297	143	6670	124945	93616	391	22.5	315.2	7.1		74.9		
2004	16	3	318	318	167	6975	145751	108592	805	21.9	341.5	6.4		74.5		
2005	16	3	276	276	131	8071	138848	108134	299	29.2	391.8	7.5		77.9		
1999	17	215	1181	1117	939	8960	36990	16755	774	8.0	15.0	53.5		45.3		
2000	17	157	1006	968	667	8610	35373	14434	1285	8.9	14.9	59.6		40.8		
2001	17	152	848	808	566	7554	34760	14228	1080	9.3	17.6	53.1		40.9		
2002	17	150	848	814	583	8338	37345	14484	1517	10.2	17.8	57.6		38.8		
2003	17	146	740	704	461	7168	31213	12463	132	10.2	17.7	57.5		39.9		
2004	17	144	701	667	431	7137	30053	12630	1064	10.7	18.9	56.5		42.0		
2005	17	130	608	571	358	6658	25829	12001	670	11.7	21.0	55.5		46.5		
2006	17	127	558	510	300	6515	26353	12374	570	12.8	24.3	52.7		47.0		
1999	18A	1110														
1999	18		3719	3609	3487	23198	117917	48244	786	6.4	13.4	48.1		40.9		
2000	18	658	2833	2473	2364	20556	104438	41285	4169	8.3	16.7	49.8		39.5		
2001	18	643	2744	2332	2107	19435	89047	37765	1418	8.3	16.2	51.5		42.4		
2002	18	635	2376	1954	1836	17882	83296	33999	998	9.2	17.4	52.6		40.8		
2003	18	630	2192	1787	1736	15883	71783	30777	347	8.9	17.2	51.6		42.9		
2004	18	630	1829	1469	1465	13334	57554	24638	1533	9.1	16.8	54.1		42.8		
2005	18	426	1417	1170	1058	14041	55596	21703	3120	12.0	18.5	64.7		39.0		
2006	18	418	1324	1100	951	13312	51456	20505	1237	12.1	18.6	64.9		39.8		
1999	19		829	797	486	8548	32988	13865	1220	10.7	17.4	61.7		42.0		
2000	19	123	694	667	396	7140	27676	12425	728	10.7	18.6	57.5		44.9		
2001	19	122	594	570	354	5956	25670	11870	2001	10.4	20.8	50.2		46.2		
2002	19	118	566	549	307	6740	23509	10508	562	12.3	19.1	64.1		44.7		
2003	19	107	414	402	212	4755	15803	7171	506	11.8	17.8	66.3		45.4		
2004	19	107	339	327	183	3607	11437	5292	202	11.0	16.2	68.2		46.3		
2005	19	66	288	273	170	3397	12205	5997	234	12.4	22.0	56.6		49.1		
2006	19	64	256	240	136	3004	10817	5606	183	12.5	23.4	53.6		51.8		
1999	20	1177	3438	2632	339	27956	129215	56708	2042	10.6	21.5	49.3		43.9		
2000	20	1006	3104	2586	343	29661	130467	56902	3513	11.5	22.0	52.1		43.6		
2001	20	996	2967	2441	284	28190	133551	56146	3052	11.5	23.0	50.2		42.0		
2002	20	1021	2985	2457	248	31329	146859	58909	6807	12.8	24.0	53.2		40.1		
2003	20	1037	3248	2646	308	33051	159633	67015	6236	12.5	25.3	49.3		42.0		

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Year	ISIC	EST	PER	EMP	FEM	WS	GO	VA	GFCF	WSEMP	VAEMP	WSVA	FWSVA	VAGO	FVAGO	FC
2003	26	373	2976	2871	449	54036	351854	129652	20971	18.8	45.2	41.7		36.8		
2004	26	373	2997	2886	440	58489	423808	157285	29258	20.3	54.5	37.2		37.1		
2005	26	329	3229	3141	401	66451	488995	172019	34784	21.2	54.8	38.6		35.2		
2006	26	330	3374	3287	440	71156	516804	187424	46113	21.6	57.0	38.0		36.3		
1999	27	0	284	284	35	4160	42623	11422	1177	14.6	40.2	36.4		26.8		<==
2000	27	8	311	311	56	5172	47198	14328	7639	16.6	46.1	36.1		30.4		
2001	27	8	342	342	63	5739	46120	15246	5259	16.8	44.6	37.6		33.1		
2002	27	6	354	354	71	7103	42999	13981	3258	20.1	39.5	50.8		32.5		
2003	27	5	332	332	65	6752	46250	17453	2657	20.3	52.6	38.7		37.7		
2004	27	5	419	419	75	8112	54650	21182	16228	19.4	50.6	38.3		38.8		
2005	27	3	367	367	61	6419	54183	21653	1639	17.5	59.0	29.6		40.0		
2006	27	4	364	364	56	7109	71074	26237	2927	19.5	72.1	27.1		36.9		
1999	28	1119	3296	2693	389	29361	156006	63469	4593	10.9	23.6	46.3		40.7		
2000	28	1154	3310	2707	403	30784	164784	62911	6535	11.4	23.2	48.9		38.2		
2001	28	1147	3147	2523	414	30581	160685	65007	6898	12.1	25.8	47.0		40.5		
2002	28	1153	3130	2491	379	33075	179106	68925	1799	13.3	27.7	48.0		38.5		
2003	28	1150	3222	2528	412	34990	189438	76127	9648	13.8	30.1	46.0		40.2		
2004	28	1152	3418	2739	454	38823	224577	89773	11902	14.2	32.8	43.2		40.0		
2005	28	1041	3834	3263	491	55082	267497	102554	12182	16.9	31.4	53.7		38.3		
2006	28	1065	3812	3321	470	58091	292478	111798	12073	17.5	33.7	52.0		38.2		
1999	29C	350														
2005	29C	222	1041	934	162	15271	70835	28095	3222	16.4	30.1	54.4		39.7		
1999	29		1025	914	166	11015	52369	22994	1023	12.1	25.2	47.9		43.9		
2000	29	278	1157	1057	164	12680	58060	24568	1639	12.0	23.2	51.6		42.3		
2001	29	278	1124	1037	198	13445	67613	26745	3065	13.0	25.8	50.3		39.6		
2002	29	275	1211	1091	214	15193	71792	27280	2807	13.9	25.0	55.7		38.0		
2003	29	274	1233	1123	221	15955	69636	27766	1857	14.2	24.7	57.5		39.9		
2004	29	274	1243	1159	208	17074	73742	29901	2910	14.7	25.8	57.1		40.5		
2006	29	221	1022	907	156	15530	71169	29074	-4200	17.1	32.1	53.4		40.9		
2000	30	4														
2001	30	4														
2002	30	2														
2003	30	2														
2004	30	1														
2006	30	0	0	0	0	0	0	0	0							
1999	31A	113														
1999	31		518	498	134	5736	23642	9865	566	11.5	19.8	58.1		41.7		
2000	31	101	564	552	140	6575	32438	13269	367	11.9	24.0	49.5		40.9		
2001	31	102	565	543	153	6853	37598	14407	950	12.6	26.5	47.6		38.3		
2002	31	101	579	554	136	7619	30536	12281	813	13.8	22.2	62.0		40.2		
2003	31	101	484	459	115	6194	23955	10168	482	13.5	22.2	60.9		42.4		
2004	31	101	483	459	132	6030	24399	10021.	318	13.1	21.8	60.2		41.1		
2005	31	78	414	385	99	6194	25673	9828	731	16.1	25.5	63.0		38.3		
2006	31	81	405	376	101	6284	31933	11596	1074	16.7	30.8	54.2		36.3		

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Year	ISIC	EST	PER	EMP	FEM	WS	GO	VA	GFCF	WSEMP	VAEMP	WSVA	FWSVA	VAGO	FVAGO	FC
2004	37	11	145	145	17	1712	16004	4641	272	11.8	32.0	36.9		29.0		
2005	37	19	186	184	28	2518	23146	7455	1269	13.7	40.5	33.8		32.2		
2006	37	19	180	180	24	2469	34589	10218	2699	13.7	56.8	24.2		29.5		
1999	D	7380	37269	34393	13561	402318	2435743	908768	93192	11.7	26.4	44.3		37.3		
2000	D	6640	36422	33766	12747	417244	2699840	955978	132550	12.4	28.3	43.6		35.4		
2001	D	6621	37090	34333	13177	443310	2797867	997212	162104	12.9	29.0	44.5		35.6		
2002	D	6632	37477	34642	13120	482190	2897894	1034293	141240	13.9	29.9	46.6		35.7		
2003	D	6614	37467	34535	12843	497733	2909176	1072062	126657	14.4	31.0	46.4		36.9		
2004	D	6614	37423	34583	12658	520888	3006455	1174272	155910	15.1	34.0	44.4		39.1		
2005	D	5565	36556	34020	12099	564114	3077900	1191871	160879	16.6	35.0	47.3		38.7		
2006	D	5586	36356	33962	12182	576419	3146711	1168065	203025	17.0	34.4	49.3		37.1		

MANUFACTURERS' QUESTIONNAIRE

THE ASSESSMENT OF DATE PALM PROCESSING AND MARKETING SECTOR IN IRAQ

The MOT/UNIDO study team is most honored to have an opportunity to cooperate with Iraqi industrial sector in support of development of processing and marketing for the Iraqi Date industry. In order to develop a comprehensive understanding of the current status of the industry's processing and marketing sector MOT/UNIDO are undertaking an industry survey. Information from the survey will be used to determine the most critical elements affecting the industry's operations and development and to design a program of support to the industry. As part of this survey, it would be very much appreciated if you would answer the questions below. We would appreciate if you could answer the all questions as detailed below without leaving any. If you have any questions about the project of the information being collected please discuss it with the enumerator. Thank you for your support to this important project. for the people of Iraq.

Name of Enumerator:				
Date:	/ / 2007			
Time:	**start:**		**end:**	
Name of interviewee:				
Telephone:				
Date:	/ / 2007			
Time:	**start:**		**end:**	

Section A: Basic Data

1. Interviewee No.:	A1	
2. Name of the factory/company/firm	A2	
3. Governorate	A3	
4. District Name	A4	Email address: Telephone: Fax:
5. Position of the respondent in the factory	A5	
6. Education level of the respondent	A6	

7. Type of the firm: *(Private, Public, Co-shared)*	A7	
9. Type of processed products *(date, syrup, vinegar, etc)*	A8	

Section B: Production Issues

1. Production capacity (designed capacity) in tones	B1-1 dates	
	B1-2 Syrup	
	B1-3 Vinegar	
	B1-4 Others	
2. Actual production (average of 2005–2006) in tones	B2-1 dates	
	B2-2 Syrup	
	B2-3 Vinegar	
	B2-4 Others	
3. Origin of equipment *(local=1, imported=2, others=3)*	B3-1	
3a. If equipments are imported, what is the origin	B3a-1	
	B3a-2	
	B3a-3	
	B3a-4	
4. Year of manufacture of the equipment	B4-1	
	B4-2	
	B4-3	
	B4-4	
5. Type of manufacturing equipments-production lines and packaging *(1=full auto., 2=half auto, 3=manual*	B5-1	
	B5-2	
	B5-3	
	B5-4	
6. Capacity utilization of equipments (%)	B6-1	
	B6-2	
	B6-3	
	B6-4	

Section C: Raw Materials Issues

1. **Number of working days (WD) per type of production (WD/year)- Average of last 4 years**
2. **Quality and quantity of purchased dates for processing (average of 2005-2006) in tones per each grade**

C1-1 dates	
C1-2 Syrup	
C1-3 Vinegar	
C1-4 Others	
C2-1 Grade 1	
C2-2 Grade 2	
C2-3 Grade 3	

3. Prices of purchased dates for processing (2003-2006) in tones per each grade (Season 1)

Year (price/ton)	Grade 1	Grade 2	Grade 3
2003			
2004			
2005			
2006			

4. Prices of purchased dates for processing (2003-2006) in tones per each grade (Season 2)

Year (price/ton)	Grade 1	Grade 2	Grade 3
2003			
2004			
2005			
2006			

Section D: Total Production Data

Total production processed/packaged of dates and other products per year for the last 10 years

Year	Production per type of Products (tons)			
	Packed Dates	Syrup	Vinegar	Others
1997				
1998				
1999				
2000				
2001				
2002				
2003				
2004				
2005				
2006				

Section E: Storage Facilities

The capacity of storage facilities and their condition

Good = Efficient operation, no repair necessary, low maintenance | **Average** = Operating, repairs required, maintenance required | **Poor** = *inefficient operations*, major repairs/ renovations required, high maintenance.

Type of the Storage facility	**Capacity (tons)**	**Year of construction**	**Current condition** *(1=good, 2= average, Poor =3*

Section F: Management and Classification of the working force

F-1 Management

Does the facility have a strategic plan? **Yes** ☐ **No** ☐

If yes, is the plan being followed? **Yes** ☐ **No** ☐

Does the facility have a Marketing Plan **Yes** ☐ **No** ☐

If yes, is the plan being followed? **Yes** ☐ **No** ☐

Does the Facility have and asset management/maintenance system in place **Yes** ☐ **No** ☐

Number of permanent and temporary laborers and the qualifications of the temporary and permanent staff gender disaggregated

F-2 Permanent Staff:

Profession	**Qualifications***	**Number**	**Gender**	
			Males	**Females**
General Manager				
Production Manger				
Maintenance manager				
Sales Manager				
Admin Manager				
.....Manager				
.....Manager				
Sales people				
Technicians				
Guards				
.....				
.....				

*Qualifications: 1) High school; 2) 2-yesrs diploma 3) University degree;

F-3 Temporary Staff:

Profession	Qualifications*	Number	Gender	
			Males	Females
Production Manger				
Maintenance manager				
Sales Manager				
.....Manager				
.....Manager				
Sales people				
Technicians				
Guards				
.....				
.....				

**Qualifications: 1) High school; 2) 2-yesrs diploma 3) University degree;*

Section G: Power Utilization

1. Main sources of power	G1-1 Grid	
	G1-2 Generators	
2. Percentage of consumed power per source (%)	G2-1 Grid	
	G2-2 Generators	
3. Factory's daily requirement of power (average of 2005-2006)	G3 (Kilowatts)	
4. Daily power obtained from the Grid (average of 2005-2006)	G4 (Kilowatts)	
5. Daily power generated by generators (average of 2005-2006)	G5 (Kilowatts)	
6. Generators owned by the factory	G6-1 (Number)	
	C6-2 (total capacity in Kilowatts	

Section H: Buildings of the factory

1. Total number of buildings on the site of the factory	H1-Number	
2. Total number of buildings off- site of the factory	H2-Number	

3. Number of buildings of the different types on the site	H3-1 Office	
	H3-2 production facility	
	H3-3 Storage facility	
	H3-4 Others	
	(Please Specify)	

4. Number of buildings of the different types off the site	H4-1 Office	
	H4-2 production facility	
	H4-3 Storage facility	
	H4-4 Others	
	(Please Specify)	

The status of the buildings

5. Number of office buildings in	H5-1 Good conditions	
	H5-2 Average conditions	
	H5-3 Poor conditions	
6. Number of production facilities buildings in	H6-1 Good conditions	
	H6-2 Average conditions	
	H6-3 Poor conditions	
7. Number of storage facilities buildings in	H7-1 Good conditions	
	H7-2 Average conditions	
	H7-3 Poor conditions	
8. Total space in square meters of	H8-1 Office	
	H8-2 production facility	
	H8-3 Storage facility	
	H8-4 Others	

Section I: Identification of the main constraints

I-1 Constraints related to Production issues:

-
-
-
-
-
-

I-2 Constraints related to Marketing issues:

-
-
-
-
-
-

I-3 Constraints related to Institutional / management issues:

-
-
-
-
-
-

I-4 Constraints related to Asset Management / Maintenance issues:

-
-
-
-
-
-

I-5 Other types of Constraints (please specify):

Section J: Identification of the Training Needs

I-1 Training needs related to Production issues(including maintenance):

I-2 Training needs related to Marketing issues:

I-3 Training needs related to Institutional / management issues:

-

I-4 Other types of needed training (please specify):

-
-
-
-
-
-
-

NAME	INSTITUTION
Wigdan Ahmad	Unido
Andrew Goodman	Coffey
Yasameen Sadan	Cosit
Tawfig F.Jawid	Zozik Group
Hagan Abfid	Iraq Dates Processing of Marketing company
Abdulaziz Alkaragolly	NPC/Unido
Sapti-J-Hassan	Iraqi Trade
Mohamed_Suleman	Iraq Dates Processing of Marketing company
Dr. Faraoun Ahmed Hussain	Director general of Dale Palm Board/Agric. Ministry
Dejene Tazera	Unido
Ebtelhal Fadheel	Iraq Dates Processing of Marketing company

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PROGRAM OF ACTIVITIES

REHABILITATION OF THE DATE PALM SECTOR IN IRAQ - SURVEY

24 & 25 NOVEMBER 2007

SATURDAY, 24/11/07

Venue: To Be Advised

TIME	ACTIVITY	Session Leader	Participants
1000	**Tea & Coffee available**		
1030	**Open, Team Introductions, Review of the Proposed Program for 24/25th November**	Dejene Tezera – UNIDO	MOA Rep x 1 COSIT Rep x 1 MOT Rep x 3 Dejene Tezera Dr Ahmed Wigdan Mr. Abdulaziz (NPC) Andrew Goodman Amer Jabarin Tawfiq Jawid
1045	**Outline of the Rehabilitation of the Date Palm Sector Project**	Dejene Tezera – UNIDO	
1115	**Review of the Current Situation in Iraq.** **I. MOT/MOA Staff and Operations** **II. Access to Key Stakeholders** **III. Other activities of relevance within the industry** **IV. Security situation**	MOA/MOT/ UNIDO/ FAO Representatives	
1145	**Current status of the Iraqi date industry** **I. Any additional issues impacting on the industry which should be considered** **II. Regional/ international developments**		
1215	**Confirmation of the Study Objectives**	Andrew Goodman	
1245	**Lunch**		
1345	**Review and confirmation of the Survey Instruments**	Amer Jabarin	
1415	**Review and confirmation of the proposed approach and methodology**	Andrew Goodman/ Amer Jabarin/ Tawfiq Jawid	
1500	**Coffee brake**		
1515	**Confirmation of the target list of survey participants**	Andrew Goodman	
1600	**Closing Comments**	Dejene Tezera – UNIDO	

PROGRAM OF ACTIVITIES

REHABILITATION OF THE DATE PALM SECTOR IN IRAQ - SURVEY

24 & 25 NOVEMBER 2007

SUNDAY, 25/11/07

Venue: To Be Advised

TIME	ACTIVITY	Session Leader	Participants
0800	**Tea & Coffee available**		
0815	**Open, Recap of outcome of Day 1. Discussion/ clarification of any issues *arising***	Dejene Tezera – UNIDO	MOA Rep x 1 COSIT Rep x 1 MOT Rep x 3 Dejene Tezera Dr Ahmed Wigdan Mr. Abdulaziz (NPC) *Andrew Goodman* Amer Jabarin Tawfiq Jawid
0845	**Confirmation of the schedule of activities**	Andrew Goodman	
0930	**Stakeholder communications strategy.**	Andrew Goodman Dr Ahmed Wigdan	
1000	**Morning Tea**		
1030	**Security considerations**	Andrew Goodman/ Tawfiq Jawid	
1130	**Public Relations.**	Dejene Tezera – UNIDO Dr Ahmed Wigdan	
1200	**Report Formats and Timing**	Dejene Tezera – UNIDO	
1230	**Lunch**		
1330	**Other Business**	*Andrew Goodman*/ Amer Jabarin/ Tawfiq Jawid	
1500	**Closing Comments**	Dejene Tezera – UNIDO	