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27 March 1987
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ESTABLISHMENT OF THE ARAB REGIONAL PACKAGING CENTRE

DP|RAB|83|020|11-69

Technical report: Studies, consultancy and recommendations about milk and dairy products packaging problems (in view of potentially forthcoming packaging specifications standards)*

Prepared for the Government of the Kingdom of Saudi Arabia
by the United Nations Industrial Development Organization,
acting as executing agency for the United Nations Development Programme

Based on the work of Gérard O. Baldin
Consultant in milk and dairy products packaging

Backstopping officer: J. Belo, Agro-based Industries Branch

United Nations Industrial Development Organization
Vienna

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UNITED NATIONS



UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

UNIDO

6 August 1985

PROJECT IN THE ARAB STATES

JOB DESCRIPTION

DP/RAB/83/020/11-69/31.7.E

Post title Consultant in Milk and Dairy Products Packaging

Duration One month

Date required As soon as possible

Duty station Casablanca (Morocco)
Riyadh (Saudi Arabia)

Purpose of project The main objective of the project is to train engineers and technicians. Furthermore, it has been agreed that technical assistance will be provided within the framework of the Arab Regional Packaging Centre (ARPAC) project.

Duties The consultant will organize his activities in consultation with the Project Director of ARPAC. He will specifically be expected to:

1. Study the various possibilities for the production and packaging of milk and dairy products.
2. Analyse the problems which may be encountered in the marketing and distribution of these products.
3. Study the technical problems of milk processing units.
4. Elaborate technical specifications in this field.

The consultant will also be expected to prepare a final report, setting out the findings of the mission and recommendations to the Government on further action which might be taken.

.... / ..

Applications and communications regarding this Job Description should be sent to:

Project Personnel Recruitment Section, Industrial Operations Division
UNIDO, VIENNA INTERNATIONAL CENTRE, P.O. Box 300, Vienna, Austria

Qualifications

Packaging specialist with university degree or equivalent experience in the field of milk and dairy products packaging.

Language

English (French and/or Arabic an asset).

Background information

The Arab Industrial Development Organization, in its capacity as an implementing agency for the Arab Governments, and UNIDO, as the executing agency for the United Nations Development Programme, are jointly carrying out a project for the establishment of an Arab Regional Packaging Centre (ARPAC).

For this purpose the Moroccan Packaging Institute (Institut Marocain de l'Emballage et du Conditionnement - IMEC) is extending and up-grading some important capacities in order that it may be converted into the ARPAC. Moreover, other project activities are also being carried out simultaneously in selected countries in the Arab region.

The project is jointly financed by the Arab Industrial Development Organization and UNIDO, although there is a clear separation in each one's area of responsibilities. However, an integrated workplan was mutually elaborated in consultation with the United Nations Development Programme (UNDP).

The provision of expertise in the fields of packaging technology, economics and design suitable for the conditions which exist within the Arab region is considered to be very important.

CANDIDATES REQUESTED BY 1 OCTOBER 1985

LIST OF ABBREVIATIONS

AIDO	Arab Industrial Development Organization
ARPAC	Arab Regional Packaging Centre
DP/RAB/83/020	Development Programme / Regional Arab /83/020
IMEC	Institut Marocain de l'Emballage et du Conditionnement
KSA	Kingdom of Saudi Arabia
UHT-milk	Ultra High Temperature treated milk
UNIDO	United Nations Industrial Development Organization
UNDP	United Nations Development Programme
SASO	Saudi Arabian Standards Organisation
SIAL	Salon International de l'Alimentation
SIEL	Salon International de l'Equipement Laitier

DIARY REPORT

- Mo 17 Nov. 1986 Flight Geneva - Vienna for UNIDO briefing
- Tu 18 Nov. 1986 Briefing at UNIDO - Vienna, with several services
- We 19 Nov. 1986 Return flight Vienna - Geneva
Standby for Saudi Arabia visa
- Th 20 Nov. 1986 Standby for visa and visit to KSA consulate (2x)
- Fr 21 Nov. 1986 Visa given, Flight Geneva - Casablanca AT 933
- Sa 22 Nov. 1986 Phone contact with Mrs A. TAZI from ARPAC
Readings of Milk and Dairy Industries packaging
related documents
- Su 23 Nov. 1986 Readings and draft for start of study
- Mo 24 Nov. 1986 AM : Meetings at IMEC/ARPAC. Briefing by
Mrs A.TAZI, meeting with Mr A. ZAKI
General Manager IMEC. Reciprocal orientation
about project goals and presentation
PM : Visit to UNDP's office in Rabat "perdiem"
allowance
- Tu 25 Nov. 1986 Meeting of Mr Benkirane at IMEC, Techn. Dir
Briefing about and visit of IMEC's workshops
and laboratories as well as technical equipments.
Flight to Riyadh (SV - 138 / 18H45)
- We 26 Nov. 1986 Arrival Riyadh at 9H30. Telex of arrival not received
at UNDP/Riyadh Meeting of Mr. Odeh and Suhl
"perdiem" cashing at bank, Meetings at Ministry of
Industry and Electricity arranged for next Saturday
- Th./Fr. 27/28
Nov. 1986 Market survey of Milk and Dairy products and packaging
forms and presentations in numerous supermarkets.
Examination of imported and non-imported food products
- Sa 29 Nov. 1986 AM : Meetings at Ministry of Industry and Electricity
-Mr Azzam Al-Shahvari (Dir. Dept. Protection
and Encouragement)
-Mr Mahmoud Roshdi (Marketing Manager for Ind.
Affairs Div.)
-Mr Ranjith Withana (UN expert in Riyadh)
AM/PM: Visit of "ALMARAI" Milk/Dairy Company
Various meetings at the Company's headquarter.
Briefing about Company, products and problems
under study.
Visit of the plant and farm in Al-Kharj -including
Technical meeting
- Su 30 Nov. 1986 Meeting at Ministry of Industry (Mr Roshdi/Mr Whitana)
Phone call from Mr. Chowdhary (AIDO - BAGHDAD, Project
Technical Advisor)
Decision to make visits in Jeddah's packaging and milk
plants

Visits of "NADEC" headquarter and video briefing
(down town area)

Visit of "SANABEL" (boken) factory for milk, dairy products and fruit juices. Meeting with plant Manager. Evening : meeting with Mr Chowdhary about various aspects of the project.

Mo: 1st Dec 1986

Visit to UNDP's Office. Visit to Ministry of Industry
Visit of "NADEC"'s (250 km) farm, agricultural / development, and milk and dairy products factory in Haradh.

Evening : meeting of Mr P. Kattarh and Mr A.Musallam from "Banawi" (packaging material manufacturer) in Jeddah.

Tu 2 Dec 1986

AM : Flight to Jeddah for visits and meetings
Visit at " BANAWI PACKAGING GROUP " Meeting of various departments managers. Visit of the plant and equipments. Comments about plant possibilities

PM : Accompanied visit to "DANISH SAUDI DAIRY Co LTD" (Jeddah) Milk, Dairy products, fruit juices, Ice-Cream manufacturer. Meeting with General Manager and Processing Manager. Detailed visit of factory and equipment.

We 3 Dec 1986

Second visit to "BANAWI" to meet other managers and discuss certain problems.

Accompanied visit to "JAMJOOM FOREMOST Ltd" (Jeddah) Meeting with plant manager of that milk, dairy, ice-cream and fruit juices factory. Visit of plant and equipment. Discussion of packaging problems. Flight to Riyadh SV 020 (18H45)

Th 4 Dec 1986

First draft pages of report
New meeting at hotel with Mr P. Kattarh from "BANAWI" for briefing about visits impression in Jeddah.

Fr 5 Dec 1986

Drafting of report and programming for next days

Sa 6 Dec 1986

Visit to SASO (Saudi Arabian Standards Organization) in Riyadh for briefing about present situation in standards for foods and food packaging material.

Visit to head office of Saudi Arabian Agricultural and Dairy Co (SAADCO).
Discussion with commercial manager. Rest of the day devoted to detailed visit of the farms and plant (in Kharj), producing the "AL-SAFI" dairy and milk products. Extensive visit and very intensive discussions with SAADCO General Manager and with plant superintendent

Su 7 Dec 1986

Visit of SASO's Laboratories (Chemical, bacteriological, physical and mechanical analysis of the raw materials of products checked).
Remarkable equipments.
Visit to Ministry of Industry and Electricity (Mr Roshdi) Mr Withana)

Mo 8 Dec 1986 Visit to Deputy Minister for Industrial Affairs, Ministry of Industry and Electricity for verbal briefing of all aspects of experts' mission. Visit to Dir. of Dept for Protection and Encouragement short briefing about mission Ultimate contact with Mr Withana (UNDP) and Mr Roshdi (Marketing Manager, Division for Industrial Affairs) Briefing by phone with UNDP Central Office and telex to Casablanca for arrival Dec 9th.

Tu 9 Dec 1986 Flight SV 139 (Riyadh - Casablanca). Flight schedule perturbed. Late arrival at Casablanca

We 10 Dec 1986 Work at IMEC/ARPAC on drafting of report.

Th 11 Dec 1986 Work at ARPAC on report

Fr 12 Dec 1986 Work at ARPAC on report

Sa 13 Dec 1986 Work about report / Unformal meeting with Mr Belo (arriving from Vienna) and Mr Chowdhary

Su 14 Dec 1986 -

Mo 15 Dec 1986 Start of typing of report

Tu 16 Dec 1986 Continuous typing and lasttouch to report Discussion about report and mission results with Mr Belo + Chowdhary (pre-debriefing)

We 17 Dec 1986 Flight to Vienna (via Geneva - Zurich)

Th 18 Dec 1986 Debriefing in Vienna

Fr 19 Dec 1986 Return to Geneva. End of mission

Countries, Organizations, Enterprises visited

Persons met by the expert

- AUSTRIA : UNIDO (Vienna)
 - Mr Joao BELO (Project Leader)
 - Mr H. Creydt
 - Mr Lucio LEITE
 - Mrs MAZUE
 - Mrs PRESSINGER
 - Mrs H. ZEILMAYER

- MOROCCO : IMEC/ARPAC (Casablanca)
 - Mr A. ZAKI (Gen. Manager IMEC)
 - Mr L. BENKIRANE (Dir. Techn.IMEC)
 - Mrs A. TAZI (Administrative Assistant in ARPAC)

- UNDP (Rabat)
 - Mr N. LAUZON (Rep.Res. Adj)
 - Mr S. CHACRA (Adm.RR)

- Kingdom of SAUDI ARABIA : UNDP (Riyadh)
 - Mr Abdallah Odeh (Ass.Rep. Rés.)
 - Mr Abd Rahman Suhl (Adm. Of.)

- MINISTRY OF INDUSTRY AND ELECTRICITY (Riyadh)
 - Mr Mubarek Abdallah Al-Khafra (Deputy Minister for Industry)
 - Mr Assam Al-Shahvairi (Dir. of Protection and Encouragement)
 - Mr Mohammed D. Roshdi (Marketing Manager Div. Ind. Affairs)
 - Mr Ranjirh M. Withana (An expert Ind. Economist Ministry of Industry)

Visited Milk and Dairy Companies: (offices, farms, plants)

- * ALMARAI (Riyadh / Kharj)
 - Mr John Mc Inerney (Marketing / Sales Dir), Riyadh
 - Mr Paul G. Banks (Dept. Promotion Riyadh)
 - Mr Trevor Glavin (Plant Manager), Kharj
 - Mr Michael O'Reilly (Quality Control Manager), Kharj

- * NADEC (Riyadh / Haradh)
 - Mr A.S. Al-Owain (Animal Product Manager / Riyadh)
 - Mr X (Veterinary Research and Agricultural Devel. Manager)
 - Mr N.S. Ammari (Dairy Processing Manager), Haradh

- * SANABEL (Riydah)
 - Mr Mohammed Al-Rahdi (purchasing Office), Riyadh
 - Mr M.A. Durrani (Process Manager)

* DANISH SAUDI DAIRY Co Ltd (Jeddah)
- Mr Kurt Iding (Managing Director)

* JANJOOM FOREMOST Ltd (Jeddah)
- Mr Henk Vander Gugten (Plant Manager)

* SAADCO (Riyadh/Kharj) "AL-SAFI"
- Mr Abdullatif Al Ajaji (Director General)
- Mr Ghazi H. Gelidan (Commercial Manager)
- Mr Khalid Mohd Ahmed Al-Qasair (Dairy Plant Superintendent)

Visit to S.A.S.O (Specifications) * SAUDI ARABIAN STANDARDS ORGANIZATIONS (Riyadh)
- Mr Sirag M. Massade (Dir.General Standards Dept)
- Mr Badr Al-Saad (Head Food Section)
- Mr Ahmed Al-Left (Chemical Section)

Visit to SASO Laboratories

- Mr Saad A. Hussainan (Dir. of Chem. Lab)

- Mr Musarriat H. Zafrî (Polymers expert)

Visited Packaging Material Industry

* BANAWI INDUSTRIAL GROUP (Jeddah)
- Mr Pierre E. Khattar (Ass. to President / Chief Executive of)
- Mr Peter E. Dubey (Project Engineer)

* BANAWI PACKAGING (Jeddah)
- Mr Fadi Habre (Sales/Marketing Manager "A")
- Mr Amal N. Musallam (Sales / Marketing Manager "B")
- Mr Dilip M. Sawant (Tech. Ind. Serv. Manager)
- Mr J. Menon (Production Manager)
- Mr A.I. Al-Gain (Sales Reprs.)

From AIDO / Baghdad

- Mr R.K. CHOWDHARY (Chief Technical Advisor for Project DP/RAB/83/02)

ABSTRACT

This work has been undertaken on demand and on behalf of the Ministry of Industry and Electricity (Division of Industrial Affairs / Department of Protection and Encouragement) of the Kingdom of Saudi Arabia (see organisation chart / appendix i).

This investigation is part of the project under study concerning the establishment of an Arab Regional Packaging Centre (centralised and/or decentralised in every arab concerned country).

Open-mind has been the basic request and attitude during that mission no specific guidelines narrowing the investigation having previously been given to the expert.

After a short briefing in Vienna (UNIDO), a first general information visit was paid to IMEC (ARPAC) in Casablanca. Equipment and infrastructure of the "Institut Marocain de l'Emballage et du Conditionnement" have been duly observed for potential applications

The expert then proceeded to Riyadh (KSA) where the main part of the work has taken place under the help of the marketing manager of the Division for Industrial Affairs of the Ministry of Industry and Electricity. This gentleman chose the companies to be visited and organised the whole visits and necessary discussions programme. During the stay in Riyadh a complementary visit (2 days) to plants in Jeddah has also been organised. A great part of a day in Jeddah has furthermore been devoted to a detailed visit and to numerous contacts with various responsible people of the "BANAWI PACKAGING GROUP Co." (of Lebanese origin), the only one KSA manufacturer of paperboard and cardboard packaging items (from imported raw materials) for the milk and dairy products industries of the country.

In the course of these numerous contacts, the existence of a conflictual situation arisen between the packaging material supplier and the biggest milk farm and dairy products producer "SAADCO" has been disclosed. This problem has in reality been the key question leading to the organisation of the expert's mission,

and for the examination of the actual procedure in matter of standard and specifications presently existing or not existing in the field of milk and dairy packaging, and for what should be done later on.

After thorough study of the products being on the market, ((Appendix II) : chart pages extracted from the list (1984) of licenced factories in production, the list (1984) of industrial licences issued and the complementary lists (1985 and 1986) of licenced factories and industrial licences issued) of the selected visited plants equipments installed, of the marketing concepts and strategies developed and of the packaging material (imported or locally produced) being used, the expert may say that the quality level in all respect reached by the milk and dairy industry of the KSA is already of a fairly high degree. It may definitely furthermore advance by still enlarging the variety of the products offered to the consumer's market (imagination, creation and development of new products, products diversification), packaging material diversifications (locally produced plastic original packagings for instance) original designs (forms, shapes and graphic presentation).

Ideas, suggestions and recommendations have been given in that sense during the various conversations and visits. The question of franchising and licencing has also been approached.

Standards and specifications problems : equipments and packaging machines being used are inevitably imposing the specifications for the packaging materials to be used on them. Leasing contracts with milk and dairy equipment suppliers guaranteeing a perfect maintenance, spare parts supply and after sales services, do not authorize (logically) to use other packaging material on said machines than the one they exclusively manufacture and supply. Consequently none of any local packaging material manufacturer may pretend to be a substitute packaging supplier without infringing the between parties leasing, supplying and after sales concluded contract, unless having previously undergone an adequate authorization agreement with all details, specifications and limitations of validity duly specified and undersigned between the "three" parties involved.

SUGGESTIONS AND RECOMMENDATIONS

The milk and dairy industry of the KSA being well and most modernly equipped should'nt have to fight with basic difficult problems.

The possibility to call upon after-sales service organisations of the suppliers give to the KSA dairy operations managers a high degree of security.

The ever growing demand of fresh milk products, the population regular encrease, the products diversifications and introduction of new and latest equipments, encourage at the same time (and necessitate also) the further development of the mass stock farms number and production capacity. During the expert's stay in Riyadh a press release on new projects, increase in milk, was published "Arab News, 8th Dec, 1986" from which we hereafter reproduce the milk and dairy farms and industries comments as synthesizing picture:

NEW PROJECTS INCREASE MILK, SHEEP PRODUCTION

" The Kingdom's 38 dairies milk production by 28.2 percent to
" 124.7 millior. liters. More than 70 percent of this milk is turned
" into laban. Riyadh, home of the Saudi Arabian Agriculture and Deve-
" lopment Co. (SAADCO), and Saudi Masstock - the two biggest dairy
" operators in the Kingdom - leads in milk production. Last year,
" Riyadh's 20 projects produced 96 million liters of raw milk. The
" capital produced 77 percent of the Kingdom's milk. The prévious
" year, Riyadh had 16 projects that produced 75.2 million liters which
" was 78.8 percent of the Kingdom's total.

" The next largest producer of milk is the Eastern Province,
" with eight dairy projects producing 21.2 million liters of raw
" milk. The Northern Province's three projects produced 2.57 million
" liters of raw milk. Hail's 2 projects produced 2.42 million liters,
" Qasim's four projects produced 2.2 million liters and Makkah's one
" project produced 2.2 million liters.

" This milk was produced by 29,751 cows in 1984 - 85.".....

These informations don't need further comments . They show sufficiently clearly the dynamic evolution of that food and industry branch, and that time is already coming for some reconsideration

in the matter of its economic policy by clarification and strengthening of regulations, licencing, liberal competition within the market of the KSA, packaging material import and local manufacturing conditions and standards, among various of its aspects.

Suggestions and Recommendations :

We would like to subdivide our suggestions and recommendations by order of priorities ABC of the questions and problems approached and analysed during the two weeks stay of the expert in the KSA.

A) Conflictual situation between "BANAWI PACKAGING GROUP" and "SAUDI ARABIAN AGRICULTURAL AND DAIRY COMPANY".

There are two main aspects to be worked upon :

- A.1 - the sort of "monopolistic" position of the Lebanese Banawi group
- A.2 - the possibilites to introduce or not KSA standards and specifications for every type of packaging material being produced for and used by the KSA milk and dairy industry.

The expert thinks that for "A.1." like in other industrial branches of the Kingdom, the existence of various packaging manufacturers having to compete between each other for capturing a share of the market, would continuously ameliorate their equipment, quality of packaging produced, severity of quality controls, better quality/price ratio and last but not least sterile quality of their production, and amelioration of the delivery terms of the ordered items.

For the "A.2" question of introducing standard specifications not only for the food product produced but also for the packaging material containing that food, the actual general guidelines of SASO are to be respected as well by the packaging industry (imported and/or locally produced material) than by the dairy industries. (See the appendix III, the complete description, and particularly point 4 regarding packaging). As further discussed in this report, the variety of the technical equipment of the various small, middle size and large dairy and milk products operation plants doesn't simplify the determination of specific packaging standards, neither do the various exclusivity supplying contracts undergone with certain equipment and packaging suppliers.

The expert recommends for these reasons to :

- a) fix first an industrial/economical policy regarding the "yes" or "no" authorization of the creation of other packaging manufacturing companies in the country ;

- b) If "yes" is the answer, see with the equipment manufacturers how they could be interested in joint packaging ventures with Saudi partners and up to which point and in which form it would than be possible to ask them (or oblige them) to communicate, admit and apply the packaging specifications to be respected and officialised through the SASO Institution in conformity with the Division or Industrial Affairs of the Ministry of Industry and Electricity.
- c) If "no" is the answer for a) the "monopolistic" actual position prevailing in KSA in favor of the mentioned packaging group is thus reinforced ; it will than have to be known that a kind of "economical war situation" between local packaging material supplier, foreign machinery and packaging suppliers and local milk and dairy products industries shall inevitably develop, poisoning the atmosphere by creating constantly (like it is already today the case) problems between buyer and suppliers who not being able to find themselves the right solution are calling upon the Ministry of Industry or upon SASO asking for protection under one form (specifications for instance) or another (import limitations for instance).
- d) In spite of the fact that this industrial / economical policy decision has still to be thoroughly studied and the solution conceived, it appears necessary to already undertake collecting (by SASO) all packaging specifications and locally produced packaging materials used by the milk and dairy industries to put their products on the market. By thoroughly analysing through synoptic charts these various specifications it should than be possible to elaborate a list of minimum/maximum tolerances for the different characteristics of every packaging material to be sold and utilised in the KSA for packing dairy products and to complete it constantly as soon as a new "equipment/specifications/packageing material" concept is being introduced in dairy plants in the country.
- e) This neutral and objective way to assemble an finally eventually elaborate standards and specifications to be respected by everybody could progressively be introduced, even in today's situation, and would be of great value at the moment of taking decision "yes" or "no" above mentioned, in making it much more easily admitted by all parties involved (due to all pre-contacts thus created).

B) Creation, development, introduction of new products

The market is more and more in marketing and products evolution :

- B.1 - by new brands of new dairy plants
B.2 - by new products names of existing dairy plants
B.3 - by new packaging designs of existing products (new brand image)

However this way of acting doesn't really introduce novelties or diversifications of assortment, respectively brands. The market consumption of milk and dairy products being growing every year (creation of new farms and plants proves it clearly) the consumers are also becoming more demanding curious and sensitive not only to a larger choice of products, but also to more original products with more creativity in them. Discussions with the marketing / sales managers of the visited companies confirmed clearly this fact. That is why great attention should be paid to the creation, development and launching of new diversification products / lines thus permitting to progress at the same time in the field of packaging material and design.

How to promote this movement ?

B.4 - by renewal / enlargement of assortment and product lines

B.5 - by diversification of assortment

B.6 - by original creation of new milk and dairy products

B.7 - by introduction of new products through licencing or franchising agreements

B.1 / B.2 / 3.3 may be very well conceived, developed and introduced by the KSA companies without necessitating enormous spendings, equipment buyings or external help and / or advice.

To the contrary, B.4 and B.5 already need some external help in form of market analysis, contacts, foreign observations trips, and testings on one hand, as well as some original marketing / creativity / design work on the other hand.

In the case of B.6 and B.7 it is definitely necessary to enter in contact with external consultants and foreign dairy and milk products manufacturers for close collaboration work.

C) Packaging material diversifications

This suggestion concerns the wide range of possibilities offered by the petrochemicals and derived plastic industry already well developed and still more developing in the country. It is logical to imagine utilising much more the potentialities the plastic materials are offering for the endless creativity of new plastic materials and variety of forms of the containers for food products and particularly

dairy products. It has not to be forgotten that the local petroleum resources permit to produce plastic "throw away" packaging material at, in numerous cases, cheaper prices than the price of imported paper packagings. A great attention should be given to this aspect of the packaging material question and investigation and development programs would have to be established between the dairy producers and the plastic (respectively petrochemical) industry.

D) Packaging design (form and graphic presentation) related to Marketing concepts

This is an another and very important aspect of creativity where imagination must be left free to develop unexpected things. The best marketing concept may give no results if the food product created isn't perfect on one hand, and if the created package (shape + graphic ornamentation) are not irresistibly eye-catching on the other hand. It is definitely sure that for these two specific fields a close collaboration with foreign consultants, specialists and experts would bring very interesting results and further stimulate the consumer market development. Furthermore it must be said that great attention could be also paid to the valorisation through creativity, of the local taste and habits (traditionnal as well as the ones in evolution).

E) Visits to food technology, engineering and packaging exhibitions

The milk and dairy manufacturers of KSA, the SASO and the marketing dept. of the Ministry Division of Industrial Affairs would get a lot of up to date informations by not missing visits to this type of international fairs. Recent SIAL in Paris (for all kinds of foods), SIEL 86 in Paris (for the milk and dairy equipment, SALON DEL'EMBALLAGE 86 in Paris (for all types of packaging materials and forms) are a must in today's very rapid industrial evolution. Similar exhibitions in various other countries could offer same advantage.

REPORT ON MISSION

(DP / RAB / 83 / 020 / 11-69/31.7.E)

"Study of the problems related to the packaging of Milk and Dairy Products for eventually elaborating specifications in this respective field"

Based on the "job description" the approach of the study has been subdivided into four main sections :

1. Study the various possibilities for the production and the packaging of milk and dairy products
2. Analyse the problems which may be encountered in the marketing and distribution of these products
3. Study the technical problems of milk processing units
4. Elaborate technical specifications in this field

Note : This consultancy mission is also linked on one hand to the potential (and as large as possible) utilization of ARPAC (Arab Regional Packaging Centre) in Casablanca (IMEC's building), as well as to the utilisation of the national decentralised materials testing centres of each such equipped arab country.
The mission thus has been starting and ending in Casablanca (where the present report had to be typewritten).

The expert, however, did not see possibilities for an effective participation of ARPAC/IMEC own technical resources, namely in terms of laboratory testing facilities, in the approach and further development of the present study about milk and dairy products packaging in Saudi Arabia.

Three main reasons were on the basis of his position regarding this subject:

- a) The distance separating Casablanca and the potential clients (KSA for instance) is too great.
- b) The fact that the plants in KSA are enough well equipped laboratorywise, that the only actually operating paper-board and cardboard packaging material supplier has himself some similar laboratory testing equipments than ARPAC has, and the fact that in case of claims attestations are being provided by the up to date equipped laboratories of SASO (Saudi Arabian Standards Organisation) acting as neutral analytical and control laboratory. It also has not to be forgotten the existence of the Laboratory of the Ministry of Industrial Affairs and Electricity which may also be solicited in certain cases.
- c) The fact that if a Milk and Dairy products Company wants to create either a new product or a new packaging shape, design, printing or even brand image, this company will pay great attention to confidentiality being respected.

Utilising the far away based ARPAC's services (packaging and design) represents a potential danger to see competitors becoming accidentally aware of the new creation under way with all eventually commercial heavy negative consequences for the client firm.

.....

Introductory comment :

The milk and dairy industry is a very dynamic and young industry in the KSA. Most of the visited plants are not even five years old. They are thus conceived and usually equipped with recent or most recent machines and apparatuses. Consequences : packaging machines and materials they use are highly up to date and correspond to the products characteristics and necessities of today (which furthermore are being encountered and applied the world over by this type of food industry).

Section 1. Study the various possibilities for the production and the packaging of milk and dairy products

Milk products

There basically are two forms of preparation and presentation of the milk used as raw material for the production of milk and dairy products for human consumption :

- a) The "fresh milk" in liquid form, locally produced (in KSA) in the massstock farms by the cows.
- b) The "recombined milk" elaborated from the imported milk powder (flakes, roll-dried, spray-dried)

We saw and visited plants of both types of raw material utilisation during our stay in the KSA.

It is also a fact that the "recombined milk" procedure allows to sell the final products cheaper to the consumers than the products elaborated from "fresh milk" (around 25% cheaper). The customer is being sensibilised to the "fresh milk", this label being an important sales argument for linderling the negative aspects of high pricing.

"Recombined" and "Fresh" milks products are being sold both under "pasteurised" form by all factories (72°[75° during 15|30 sec). Shelf lives of such products are relatively short (3 - 5 days). To the contrary the products manufactured on the base of the "UHT process" (+ 140°C / 5 sec) by using Ultra-High-Temperature are being produced by few companies and show a three months or longer shelf life for a non-opened package which also remains as product, inalterated in taste. Once opened, both types of milk ("pasteurised" and "UHT") should be consumed as rapidly as possible (maximum 3 days delay) in order to avoid any bacteriological damage. (To be mentionned, the fact that SAADCO plant seems to actually be the only one able to produce "UHT/Fresh milk").

"Fresh milk" as well as "Recombined milk" as raw materials allow both the production of the same varied assortments of milk and dairy products (ex : milks, fruit flavored milks, laban zabadi, lebneh, yoghourts, ice-cream, cheese, a.s.o)

Milk powder as well as butter are not produced in the country. but are imported (from New-Zealand, Australia, Europe, for instance. The milk powder price, even imported, makes the final "recombined milk" being cheaper than the one produced by the KSA cows. But with the disadvantage of not being "fresh milk" as demanded by the consumer's market !!

To produce fresh and pure cow's milk in such a desertic geographical area necessitated an enormous effort of imagination, will, drive, financial investments and agrotechnical / veterina-tarial knowledges. First of all the land had to be irrigated and treated with fertilisers in order to be able to produce hectares and hectares of alfa-alfa and Rhoden grass for the feeding of the cows (mainly USA races). Massstock farms were built for 1000 to 3000 cows for optimal functioning, feeding, milking and yielding. The cows eat systematically the produced grasses and nutritional additives and are being milked 2 times a day by means of automatic milking machines in specially conceived and built stables (Appendix : illustration "AL-SAFI", as example).

We would like to illustrate that evergrowing demand also with the NADEC's factory example. This factory, just put 8 months ago into operations, receives the milk from its 150 meters distant farm at a rate of 35000 lts. a day. Due to the fact that the market demand and factory capacity could both absorb a 50000 lts/day production volume of fresh milk, a new farm for 1000 cows is already being projected.

Among the visited companies the certainly biggest farm has been "SAADCO's" It is the biggest cattle breeding in the country and the biggest milk producing capacity with 250000 lts of "fresh milk" / day being processed into products being sold under the "AL-SAFI" brand :

Packaging and equipments in relation to specifications

The processing and packaging equipments are being consti-tuted by the best in the world known technical installations produced by european, american, japanese, among others, dairy equipment manufacturers. When the company has a foreign partner usually the equipment comes from that partner's country or is from same origin than the one the partner's mother company is. Thus and inevitably the packaging materials specifications are automatically given: On one hand due to the fact that the pro-duced dairy products are well known ,thus determining said speci-fications for the material(which are being same than there where they are otherwise produced), and on the other hand due to the material specifications determined by each type of equipment and machines themselves.

Two types of packaging systems are actually being used all over the country for liquid milk products :

- The "Pure Pak" system (american origin / kind of paperboard bottle of square section) which has its own specifications due to the equipment itself
- The "Tetra Brik" system (from the european-swedish manufacturer TetraPak / a kind of rectangular brick-shaped paperboard package) and the "Tetra Rex" (square bottom similar to PurePak package from same manufacturer) with their particular specifications related to the equipment developed over years and years by the swedish concern.

Both packaging systems can be applied to "pasteurised fresh milk" and to "pasteurised recombined milk".

Furthermore, the Tetra Brik filling system is particularly indicated for the filling of UHT sterilised milk.

Both types of packaging are being used (sometimes simultaneously in the same factory) all over the country, for the filling and selling of whole milk (fresh or reconstituted, milk with low fat content, laban, flavoured milks, cream, fruit juices, a.s.o.) For products like yoghourts, different packaging forms and materials are being used : liquid yoghourts = same packaging than above described, or in plastic bottles. Firm yoghourts and gelified desserts or ice-creams = plastic cups, beakers or boxes (aluminium sealed in case of yoghourts + plastic cover). These plastic packagings are being produced in the country. Certain materials (ice-cream aluminium coin foils for instance) are being imported.

In the case of the PurePak type, the raw material (paperboard foils in rolls) is being imported to KSA from the USA for instance, processed, cut, folded, mounted into the finished "bottle-box", locally in Jeddah by BANAWI Group's Ltd, but also imported from Norway (Elopac made under licence). To the contrary the TetraBrik foil is being imported in big rolls from the TetraPak equipment manufacturer himself directly or through parent companies, and the box directly formed on the machine, simultaneously to the filling of the milk in the dairy plant.

Section 2) Analyse the problems which may be encountered in the marketing and the distribution of these products

Besides the problems existing with the raw material "Milk", one may encounter in the dairy plant (bacteriological and chemical controls), exists also the one of the non-conformity of the packaging material to the specifications given by the plant on base of the instructions accompanying the specific machine being used. This may result in problems which later on show up in the course of the marketing of the products and in the course of their distribution and shelf life at the sales points.

The main problems of the packaging material during filling may be for instance :

- leakage of package, bad sealing
- non-conformity of printing
- dirty or dusty material (a real danger for sterile products)
- inadequate resistance due to insufficient cardboard quality
- inadequately sterile packaging material (recontamination risks)
- non-resisting material to long storage at elevated temperatures (above 40°C) in summer
- a.s.o.

In the course of the distribution from the factory to the consumer (through transportation and sales points) the problems encountered may again be almost the same or even present some additional ones, like :

- insufficient resistance
- leakage of package, bad sealing
- shelf life and/or cooling temperature not respected (first in first out) thus causing fermentation of the product
- change of taste through light and permeability sensitivity

With respect to marketing / sales / publicity, particular importance should be attached to :

- problems of sterility
- conformity of colours, design, texts of packaging materials
- not respected shelf life (giving thus bad brand image to consumer)
- improper delivery terms
- bad cardboard quality (brilliance for instance insufficient)
- bad sealing, a.s.o

In order to avoid at a maximum all these problems of quality, the dairy plant has to be able to trust totally the supplier relatively to the quality of the packaging material it gets delivered on one hand and on the other hand relatively to the guaranty given by the supplier, that his merchandise is being made and delivered totally in conformity with the specifications given by the equipment the dairy plant is using and / or the market constraints of the type of market to be distributed and products to be filled, and the legal regulations and standards being applied within the country.

If the guaranties (products / packaging materials) may not be given and respected (for instance the sterile delivery of the packaging material having to being used in the dairy plant) it is by far the best and the safest solution to go and buy the material from somebody else very secure and this either locally (if a competitor exists) or by import. As dairy plant you have to make totally conform products corresponding to their particularities and specifications fixed by the respective food regulations. All that precise and accurate work dairy farms and plants are doing, as well as the consumer's health, cannot be endangered by the non-conformity of any kind of inadequate packaging material.

Section 3) Study the technical problems of milk processing units

As already indicated the dairy farms and milk and dairy products plants are not older than between 1 to 8 years. It is thus logical that the technical problems they may have to face are not due to an inadequate equipment at all. They are effectively all equipped with almost the same most recent installations developed, and used by numerous dairy enterprises all over the world with great success, as well in large as in small operational units.

The technical problems they may encounter do much more come either from a human error of manipulation or from a packaging material with a qualitative deficiency, than from the technical equipment.

As far as the products (the food products themselves) are concerned, regular quality control of the milk and additional products, before, during and after processing, on their chemical, organoleptical, physical and bacteriological aspects, are being made. No one dairy plant wants to put a bad quality product on such a dynamic market as the KSA is and consequently endorse the risk of losing thus part of its market share.

As far as the equipment is concerned the well known milk and dairy machinery and engineering specialised firms having sold in KSA their installations, have concluded with their clients at the same time an after-sales service guaranty being thus able to be called at rescue any time and to intervene super-rapidly for solving technical unexpected problems or providing spare parts very rapidly. This may either be done by their in KSA based technical servicemen or by some specialists directly coming from the mother company itself. Rapid repair, spare parts change and solution of the problem is vital for the dairy plant as the fresh milk cannot remain unprocessed in storage tanks without irremediable loss due to the bacteriological changes.

As far as the packaging of the milk and dairy products is concerned every KSA milk processing plant relies upon the seriousness of the packaging material suppliers. It is for instance for that reason logical that the problem presented by the "Tetra Rex" packaging (similar to PurePack packaging) material, are being kept much better under control because of the manufacturer of the machines being at the same time the manufacturer and the supplier of the paperboard and of the package having been formed out of it for being used on that specific machine, than if it would be done by someone else (third party). The Tetra Rex equipment manufacturer supplies thus directly all of his clients, knowing exactly all of their needed specifications and requirements, machine by machine he installed in their plants. He also is thus able to get a regular feedback from the plants whenever trouble-shooting is necessary, feedback which permits to the machine manufacturer to constantly ameliorate the concept and the quality of the work his equipment is performing. Working thus hand in hand TetraPak Co and the dairy plants being their clients are in this "example-case" in the best position to logically have the best chances to put on

the consumers market products of top quality in all respects, as well as to give to the dairy company and to its products a very high brand image level !!

Section 4) Elaborate (?) technical specifications in this field

The Saudi Arabian Standards Organisation, the SASO, progressively on his side works out specifications either on the foods of various food sectors as milk for instance (specifications elaborated in form of a targeted chapter of a "Codex Alimentarius"); or on the packaging materials properties and characteristics, transportation and storage (in form of general considerations and recommendations).

In the case of pasteurised milk (see Appendix III) such a standard has been issued in 1977, based on various similar prescriptions of other countries, but voluntarily giving (impossible to do it because of the diversity of the equipments, of their relative specifications) any precise and to exactly followed specifications concerning the packaging materials for dairy products, but only "general recommendations" which are following:

..... "PACKAGING, TRANSPORTATION AND STORAGE"

" The following shall be taken into consideration :

- " - The containers of pasteurized milk shall be made from harmless material, clean, sterilized and cause no change in milk properties.
- " - Pasteurized milk shall be mechanically packaged to avoid any contamination.
- " - The containers shall be tightly closed in a manner that prevent any contamination.
- " - The temperature of pasteurized milk shall not exceed 10°C during transportation and storage.
- " - Pasteurized milk shall not be sold to the consumer after the elapse of 3 days of production then returned to the plant.

LABELLING

- " Taking into consideration what has been stated in the Saudi Standard N° 1. concerned with "Labelling of prepackaged Foods", the following information shall be legibly labelled on the containers of pasteurized milk.
- " - Pasteurized milk
- " - Date of pasteurization
- " - If pasteurized milk contains more than 3% fat, the species of animal from which the milk is obtained shall be declared
- " - In the case of homogenization, it shall be declared
- " - In the case of using milk powder, its percentage shall be declared".

The non existence of precise standards for the milk packaging is not only understandable, but in today's situation perfectly right. Nobody may just impose its specifications to all milk and dairy products manufacturers without provoquing inevitably enormous counter effects either on the equipment of the plants or on the undergone after sales services agreements.

Such an action would certainly initiate an endless tempest between all the parties concerned with it (Ministry of Industry and Electricity, SASO, local or/and foreign packaging manufacturers, local fresh milk and recombined milk and dairy products producers).

Having got in the course of this inquiry a fairly deep insight into the KSA milk and dairy industry as well as into the local paperboard industry and into the actual position reached by the SASO, it seems to the expert that the only real motive for one party requesting to exactly define packaging specifications (the BANAWI Packaging Group) is the desire to maintain and to confort its "monopolistic" packaging material producer position within the country. It is thus advisable to :

- 1°) Reexamine thoroughly if such "monopolistic" position is not at middle and long term a real danger for the country's liberal economic policy ?
- 2°) Study thoroughly and with rigorous good will any attempt to establish by newcomers new packaging manufacturer operations of that sort in the country (answer may be yes or no)
- 3°) If yes, the future competition on the packaging market will ameliorate and maintain up to date the quality and prices in conformity with the equipments of endusers to the final benefit of the products and of the consumers ;
- 4°) Collect continuously all publications of new standards or specifications in other dairy industries having countries ;
- 5°) Reconsider periodically the KSA general recommendations to progressively narrow the tolerances given ;
- 6°) Collect progressively all internal specifications edited by the manufacturer of the equipments being used in the country ;
- 7°) Also collect all prescriptions and tolerances for the packaging, being applied by the milk and dairy plant manufacturers;
- 8°) Establish and compare periodically synoptic specifications charts (suppliers side and endusers side) in order to progressively narrow the guidelines and recommendations ut to the point (middle term being within 3-5 years) where it thus will be possible at middle term to start to definitely fix the first official specifications for the dairy packaging material, with the agreement of all concerned parties.

Some notes on the visits paid to the various companies in Riyadh and the outskirts of the capital, and in Jeddah

Visit to "ALMARAI"

Morning 29.12.1986 : At administrative and commercial headquarter. Discussion with various marketing, Sales and technical people (see list of people met). Videotape about the company. 97% of the total production is made out of fresh pasteurised milk (3 days official shelf life but supports up to 5 days, treatment at 72.8°C) during 15 sec). Besides the milk itself, marketing of products like Laban, naturel yoghourt, deserts (rose water and vanilla flavors) are made.

To much milk production in winter = necessity to create other products to compensate the smaller Laban Sales in this season.

Packaging problems with PurePak model. If delivered by ILO Norway paperboard good, but printing not satisfactory. If delivered by Banawi/Jeddah paperboard not satisfactory, but printing good !

Impressions on products : organoleptically good. Rose water and vanilla desserts, to much "gelified" and artificial flavor taste, disturbing discrepancy between the graphic ornamentation of packaging and the neat brand image.

Afternoon : Detailed visit of the manufacturing plant in Al-Kharj.

Visit to "NADEC"

Morning 30.12.86 : At administrative and commercial headquarter. Discussions and videotape presentation of the company. (agricultural, breeding and dairy activity in form of production of wheat, forage and milk (consequently dairy products)).

Afternoon 1.12.86 : Visit of dairy plant and farming in Harradh (250 Km from the capital). Back integration will continue up to the point of even cultivation fruits and vegetables; for the cows: alfa-alfa and Rhoden grass. Plant not even one year old, makes small dairy products assortment. Fresh milk, laban, chocolate and raspberry flavored milks, yoghourt nature and with real fruits flavors. Technical APV equipment Cellopack a.s.o Simple but very good laboratory facilities. Rigourous quality controls (brand image). Not satisfied with packaging shipments by supplies Boxes not hermetically dustproof sealed . Possibility of modification of sterile product.

Visit to "SANABEL"

Afternoon 30.12.86 : Visit of factory near Al-Kharj, including farming. They also buy milk from other farms under control. Was higher ranked than now. Marketing concept has to be revised and company restructured for further development and maintaining share of the market.
Equipment Tetrapak, Purepak and Sidel (milk bottles) Simple assortment of fresh milk product

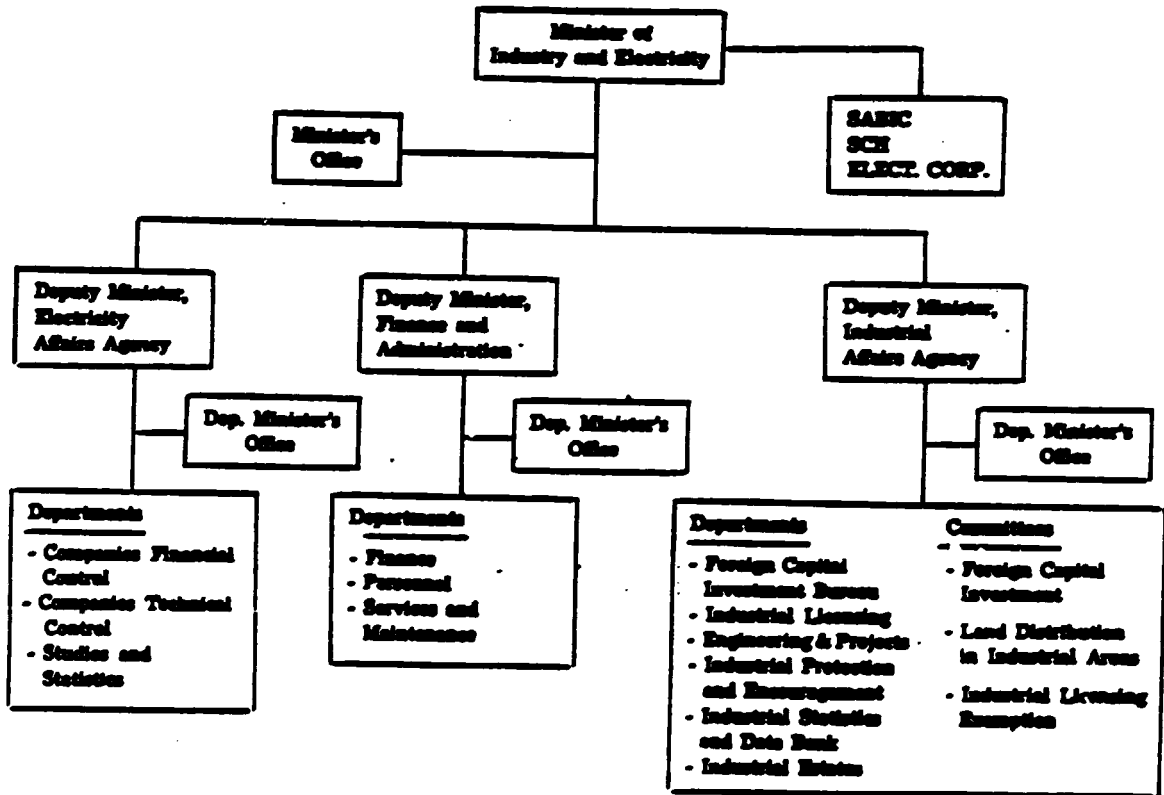
Visit to "BANAWI PACKAGING GROUP" (in Jeddah)

AM/PM 2.12.86 : Meetings with various managers. Visit of the plant.

(also AM 3.12.86)

making the milk and dairy packaging material. Paw paperboard arrives in big roll, is than cut, preformed glued and printed. Banawi receives and follows the clients' specifications if product not in direct contact with the material. If direct contact with food product, equipment specifications and client specifications are being followed. No specific relations to SASO in Riyadh (Saudi Arabia Standards Organization). The food manufacturer have to compose their formulations in accordance to the norms and regulations prevailing in KSA (mostly corresponding to the international norms). Are sometimes involved into graphic and design concepts (Almarai's cow for instance) The plant is able to produce packagings on base of corrugated board, multilayer board, polyethylene coated board, white or combined grey and white paperboard, a.s.o.
Various material weights may be used on mostly american equipment. Presence of "BOBST auto-platine" equipment. Samples are periodically taken during production (paperboard and printing checking). BANAWI is the only manufacturer of its type in the country (5 plants). Don't think being able to use ARPAC's services otherwise as in case of counter-examination in case of claims : Similar laboratory equipment but more simple. Request SASO's attest when problems with clients. Say they have the Ministry of Industry & Electricity back-up for being choosen as local supplier in case of equal price and quality than delivered by foreign suppliers.
Complain about difficulties they have to be accepted as second supplier of companies linked through their equipment to foreign suppliers. Example : have not succeeded in their attempt to supply also the Tetra Rex packaging to SAADCO.

Chart - I
Ministry of Industry and Electricity
Organization Chart



INDUSTRY ACTIVITY	TYPE OF BUSINESS	NAME OF FIRM	ADDRESS OF FIRM	PROD. CTS	LICENSED PRODUCTION CAPACITY (YEARLY)	FINANCIAL DATA		No.	DATE	FOREIGN CAPITAL SER. & NATIONAL	REMARKS
						PAID-UP	TOTAL INV. CAPITAL				
Meat stock plants recon- struction (S.A.)	7	National Meat Plant (Mohammed Munzer Abdul Hamoud Halawani)	Jeddah P.O. Box 690 Tel. 6366496 Tel. 6366487	Mince-Mutton	3,000 Tons	2,170,000	9,600,000	251	23/6/1403		
	8	Al-Habair Factory for Packing and Processing of Meat Abdul Mubeen Abdul Aziz Al-Habair	Dammam C/O. Riyadh P.O. Box 359	Hamburger and mince Meat Frozen Meat Lunches, Sausage and Jerked Beef	1,350 Tons 1,800 Tons 1,350 Tons	6,750,000	26,990,000	219	4/6/1400		
	9	Khalifa Al-Quasbi Fac- tory for Manufacturing and Freezing of Meat Khalifa Abdul Rahman Al Quasbi	Dammam P.O. Box 1595	Cutting and Process- ing of Meat	21,000 Tons	34,200,000	68,400,000	217	16/6/1399		
Dairy products	10	Al-Qadi Factory for Packing and Wrapping of Chicken (Baker Abdulah Abdul Rahim Al-Qadi)	Abha C/O. Taif P.O. Box 81 Tel. 7465475	Packed and Wrapped Chicken	7,300,000 Chickens equal to 7,300 Tons	1,675,000	6,700,000	61	15/2/1404		
	11	Riyadh Farm Dairy Plant (Mohammed Mustafa Badah)	Riyadh P.O. Box 822	Laban Yoghurt White Cheese Labanah	600 Tons 1,800 300 300	1,900,000	7,600,000	37	18/1/1397		

CLASSIFICATION CODE	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	LICENSED PRODUCTION CAPACITY (YEARLY)	AUTHORIZED CAPITAL IN S.R.		SECTOR	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY
							PAID-UP	TOTAL INV. CAPITAL		No.	DATE	
3113	Dairy Products (Contd.)	2	The Modern Factory for Dairy Products, (Mubarak Sa'eed Bajwaiber)	Riyadh P.O.Box 5031	Dairy Products	13,500 Tons	9,800,000	16,900,000	83	238 485	5/7/1397 21/10/1400	
		3	Saudi Dairy Products Factory (Awad Bakas Al-Turki)	Riyadh P.O.Box 8560	Sterilized Milk Laban Labaneh Yoghurt White Cheese Ice Cream	2,700 Tons 1,890 " " 162 " " 540 " " 405 " " 600 " "	4,360,000	17,440,000	71	414	1/11/1399	
		4	Naal Milk Company (Al-Huda Co., Ltd)	Riyadh P.O.Box 6464	Disposable sterilized feeding bottles	6,840,000 Units	6,850,000	27,320,000	49	396	1/11/1399	
		5	Al-Jawhar Ice Cream Company Ltd, (Met'ab Jawhar Al-Saud)	Riyadh P.O.Box 2518 Tel. 4011482 4038696	Dairy and Ice Cream	5,700,000 Ltrs	7,200,000	28,700,000	94	534	20/11/1400	
		6	National Milk & Ice Cream Company (Bander Ahmad Al-Sudairi)	Riyadh P.O.Box 4180	Dairy Products and Ice Cream	15,000 Tons	18,700,000	37,300,000	87	320	7/11/1396	

INDUSTRIAL ACTIVITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	PRODUCTION CAPACITY (YEARLY)	PAID-UP,	TOTAL INV. CAPITAL	No. OF WORKERS	No.	DATE	FOREIGN CAPITALS & NATIONAL	REMARKS
Dairy Products (Contd.)	7	Naseer Saad Al-Sudairi for Dairy Production and Manufacturing	Riyadh P.O.Box 8247 Tel. 4056870	Milk and Fresh Laban Yoghurt, of powder milk	5,000 Tons (5 mil. Litres) 2,500 Tons (2.5 mil. Litres)	3,890,000	15,340,000	10	162	29/4/1403		
	8	Mastook Tesba Co. Ltd. (Abdul Aziz Jaafar Al-Tayar)	Main Office : Riyadh, Factory in Al-Yatima C/O Mastook Companies Riyadh P.O.Box 8324	Fresh Laban Fresh Milk	7,300 Tons 3,450 "	3,420,000	9,680,000	18	73	16/3/1404	50 % Mixed Capital	
	9	AL-Aziziya Agricultural Products Co. Ltd. (Dairy Factory) H.H.Prince Abdul Aziz Bin Ahmad Bin Abdul Aziz and Ahmad Zeind	Riyadh P.O.Box 3136 Tel. 4631802 Tel. 4630531	Fresh Milk Fresh Laban Ice Cream	2,300 Tons 8,300 " 1,500 "	6,350,000	25,400,000	38	443	25/10/1404		
	10	Al-Aniryah Dairy Company Ltd. (Prince Abdul Aziz Bin Ahmad Bin Abdul Aziz)	Kharj/Delam C/O Riyadh P.O.Box 54246	Dairy Products Yoghurt Ice Cream Live Cattle and veals for sale	8,000 Tons 2,500 " 2,000 " 1,000 "	38,000,000	86,762,000	58	109 27 399 110	6/4/1399 26/1/1400 4/11/1400 25/3/1401	20 % American	
	11	Green Farms Factory for Dairy Products (Mohammad Bin Abdul Rahman Bin Yaseed)	Kharj C/O Riyadh P.O.Box 8241	Pasteurized Milk Laban Yoghurt	360 Tons 2,880 " 365 "	9,030,000	18,050,000	17	246	28/6/1400		

CLASSIFICATION CODE	INDUSTRIAL ACTIVITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	LICENSED PRODUCTION CAPACITY (YEARLY)	AUTHORIZED CAPITAL IN S.R.		No. OF WORKERS	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY	K.
							PAID-UP	TOTAL INV. CAPITAL		No.	DATE		
3112	Dairy Products (Contd.)	12	Al-Nakheel Plant for Dairy Products	Dhurma - Riyadh P.O.Box 5741 Tel. 4576206	Pasteurized Milk Milk Ice Cream	2,160 Tons 2,160 " 360 "	3,040,000	12,150,000	12	8	28/1/1401		
		13	Al-Dawadmi Dairy Farm Ltd. (Moadaid Obaid Al-Otaiby)	Dawadmi C/O, Riyadh P.O.Box 8230	Laban Labaneh Ice Cream	8,000 Tons 1,000 " 1,000 "	6,750,000	27,000,000	60	225	27/6/1400	24.5 % Liechten- stein. 24.5 % West Germany	
		14	Al-Ghalbiya Dairy Factory (Ghaleb Hamoud Al-Eteibi)	Jeddah C/O Riyadh P.O.Box 20680 Tel. 4822210	Dairy Products : Yoghurt Laban	1,092 Tons 778 "	1,780,000	7,120,000	16	478	27/12/1403	- 31 -	
		15	Mena Dairy Plant (Mahfouz Salem Ibn Mahfouz and Partners)	Jeddah P.O.Box 3295	Liquid Milk Yoghurt Custard Ice Cream	9,600 Tons 1,200 " 600 " 600 "	9,590,000	38,400,000	42	352 502	6/10/1399 17/10/1400		
		16	Yanbo Dairy Plant Hasan Ali Ismail	Yanbo C/O, Khobar P.O.Box 53 Tel. 8643852	Pasteurized Milk Laban Curd Sterilized Milk Labaneh Ice Cream	1.8 Million Ltrs. 450,000 Ltrs. 310,000 Kg. 600,000 Ltrs. 300,000 Kg. 300,000 Kg.	8,810,000	17,620,000	30	17	20/1/1400		

CITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	Advertised PRODUCTION CAPACITY (YEARLY)	PAID-UP	TOTAL INV. CAPITAL	No. OF WORKERS	No.	DATE	FOREIGN CAPITAL % & NATIONAL	REMARKS
	17	Rawafed Factory for Dairy Products and Ice Cream (Saoud Dakheel Allah Al-Juhaini)	Yanbo C/O. Riyadh P.O.Box 4038 Tel. 4780818	Milk Laban Yoghurt Ice Cream	1,800 Tons 1,500 " 900 " 300 "	4,270,000	17,100,000	36	169	24/5/1399		
	18	Badeyah Danish Dairy Co.	Yanbo C/O. Jeddah P.O.Box 6391	Milk Flavoured Milk Laban Yoghurt Ice Cream equivalent to	2,300 Tons 500 " 500 " 900 " 125 " 35,000 Litres	4,000,000	16,000,000	63	370	12/10/1400	5 % Danish	
	19	Fahad Al-Hukair Dairy Plant (Fahad Bin Abdul Aziz Al-Hukair)	Madinah C/O. Riyadh P.O.Box 359 Tel. 4358875 Tel. 4918511	Powdered dairy products distributed as follows : Milk Laban Yoghurt	3,930 Tons 2,400 " 900 " 630 "	3,900,000	15,600,000	30	223	8/6/1404		
	20	Al-Safa Dairy Plant Fahd Saad Mohammad AL-Ebeid.	Madinah C/O. Riyadh P.O.Box 9313 Tel. 4253167	Yoghurt Laban	940 Tons 1,250 "	1,290,000	5,160,000	22	213	8/6/1404		
	21	Hitan Dairy Factory (Ahmad Haroun Ekol Flemban)	Makkah P.O.Box 4374 Tel. 5723330	Yoghurt	11,650 Tons	3,240,000	12,940,000	25	100	27/3/1404		

CLASSIFICATION CODE	INDUSTRIAL ACTIVITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	LICENSED PRODUCTION CAPACITY (YEARLY)	AUTHORIZED CAPITAL IN S.R.		No. OF WORKERS	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY
							PAID-UP	TOTAL INV. CAPITAL		No.	DATE	
3112	Dairy Products (Contd.)	22	Alpha Dairy Co. Mohammad Sulaiman BA Al-Ghunaim	Dammam C/O. Al-Ahsa P.O.Box 35	Milk Laban Yoghurt Ice Cream	4,613 Tons 6,013 » 1,398 » 2,377 »	7,600,000	23,424,825	80	415	12/11/1399	10 % Lebanese
		23	Saudi United Food Manufacturing Co. Ltd. (Saudi Unifood) (Prince Fahd Ibn Naser Ibn Abdul Aziz)	Dammam/Khobar P.O.Box 350	Sterilized Milk Processed Cheese Cake Pastries Groundnut / Nut	7,438 Tons 3,296 » 2,672 » 3,474 » 2,494 »	26,957,750	104,231,000	310	138	28/4/1400	40 % Lebanese
		24	Al-Hajri Dairy Plant Hadi Qablan Mohammad Al-Hajri	Hafrul Batin C/O. Dammam P.O.Box 5883 Tel. 8329691	Pasteurized Milk Laban Yoghurt Labanch	1,500 Tons 1,700 » 1,250 » 300 »	2,225,000	8,900,000	26	464	4/11/1404	- 33 -
		25	Al-Median Plant for Dairy Production (Fahad Abdullah Al-Median)	Qatif C/O. Riyadh P.O.Box 15150 Tel. 4776267	Pasteurized Milk Laban	1,500 Tons 4,500 »	2,312,500	9,250,000	17	231	16/6/1404	
		26	Agricultural Projects Co., Dairy Products Rashed Abdul Rahman Al-Rashed	Al-Ahsa C/O. Riyadh P.O.Box 307	Dairy Products Live Cattle & veals Organic Fertilizer Dry & Green Feed	3,400 Tons 780 » 10,500 » 1,000 »	15,990,000	61,500,000	65	85	6/4/1399	

INDUSTRIAL ACTIVITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	LICENSED PRODUCTION CAPACITY (YEARLY);	CAPITAL IN USD		No. OF WORKER	No.	DATE	FOREIGN CAPITAL ST. & NATIONAL	REMARKS
						PAID-UP	JTAL INV. CAPITAL					
Dairy Products (Contd.)	27	Jazan Dairy Products Plant Ibn Madhi Hussain Al-Tamhi	Jazan C/O. Riyadh P.O.Box 3072	Pasteurized Milk Yoghurt Cheese Ice Cream	2,400 Tons 1,200 " 300 " 940 "	12,170,000	24,330,000	34	350	25/8/1400		
	28	Batouq Factory for Dairy Products Othman Bin Abdullah Batouq	Jazan C/O. Riyadh P.O.Box 4188 Tel. 4655767 Tel. 4659493	Dairy Products Ice Cream	6,600 Tons 200 "	4,985,000	19,940,000	28	379	8/8/1401		
	29	Saudia Dairy Plant Mohammad Ali Al-Gheishi	Al-Baha C/O. Riyadh P.O.Box 10713	Laban Pasteurized Milk White Cheese Labanch Yoghurt Ice Cream	2700 Tons 2700 " 190 " 540 " 2700 " 1080 "	5,640,000	22,390,000	54	315	16/8/1400		
	30	Al-Sarwat Co. for Dairy Products Abdullah Fayed Hamdan Al-Ghamedy	Al-Baha C/O. Riyadh P.O.Box 8123 Tel. 4044310	Pasteurized Milk White Cheese Labanch Yoghurt Ice Cream Laban	3,000 Tons 375 Tons 645 " 2,500 " 480 " 3,000	4,510,000	8,050,000	72	202 123	22/5/1401 26/4/1402		
	31	Al-Omary Dairy Products Factory Awadh Abdullah Mohammad Saleh	Abha C/O. Riyadh P.O.Box 17588	Pasteurized Milk Yoghurt Ice Cream White Cheese Total	1,200 Tons 600 " 750 " 300 " 2,850 Tons	11,260,000	22,320,000	28	473	20/' '400		

Visit to "DANISH SAUDI DAIRY Ltd" (Jeddah)

Afternoon 2.12.86 : This dairy plant (Danish and Saudi joint venture) works batchwise only with "recombined milk" whatever the product may be (milk, flavored milks, laban, yoghourts, cream, cheese, and ice-creams in form of cones, beakers, lollies, a.s.o.
Under danish management, the company uses danish formulas and for example emulsifiers/ stabilisers. Technical equipment is mainly of scandinavian origin. Packaging material is provided by Banawi Group, by exception of the TetraPak necessary material.
The products are of similar european quality, texture, flavoring and presentation. For the ice-cones, the biscuit cone is locally produced, but the aluminium packaging cone comes from Europe.
Are applying and adopting equipment supplies specifications for all their packaging .

Visit to "JAMJOOM FOREMOST Ltd" (Jeddah)

Morning 3.12.86 : Same working system than the competitor : "recombined milk" elaborated batchwise. Able to produce "pasteurised milk" as well as "UHT" milk. Manufacture also a vast assortment of fruit juices in Tetra Brik package.
Various forms of milk, fresh and flavored in Pure Pak and TetraPak shapes.
Equipment mainly APV and GRAM, GAULIN homogeniser, a.s.o. Company recently passed in Dutch hands. All non-TetraPak packaging material is ordered from BANAWI Group (their neighbour) if equipment and possibilities of Banawi suit their requirements.

Visit to "SAADCO" (Saudi Arabian Agricultural and Dairy Company)

all day 6.12.86 : After a short visit to administrative and commercial headquarter of the company, rest of the day dedicated to extensive visit of farming premices, massstock farm and dairy plant at about 20 km from Al Kharj. Biggest outfit in the whole country.
Remarkably installed, as well on the agricultural side, than on the milk farm and dairy plant side.
Have their own cattle raising and biggest massstock farms of the country.
The plant is producing its products under the name "AL-SAFI" (the purest), making various milk sizes and Laban in TetraRex packaging (reason for the problems with Banawi) and UHT in TetraBrik form (exclusivity for the 2dl Brik) and yoghourts and Lebneh in plastic jarrs.

Superb laboratory with best equipment for quality controls. Excellent products as judged by organoleptic testing.

Necessitate to diversify, to create new product lines either by own developments, by licencing or franchising agreements with foreign dairy products producers, or with the collaboration of foreign consultants.

Packaging styling and graphic presentation are good but could be still ameliorated.

The whole visit was made accompanied by the Director general of the company and by the Dairy plant superintendent.

The whole problem of the TetraRex packaging and the conflictual situation thus created with the BANAWI Group has been analysed as well as the positions about future possible specifications. Agreements with TetraPak are the key element in that question.

KINGDOM OF SAUDI ARABIA

Extract of the Dairy Plant's List as
indicated in the

- " List of industrial Licences issued under the National Industries Protection and Encouragement Law and Foreign Capital Investment Law up to 1404 (1984)".
- " Complementary List 1405 H. (1985)"
- " Complementary List 1406 H. (1986)"

Dairy
Products
(Contd.)

							INV. CAPITAL						
32	Al-Hennawi Dairy Products Factory Mohammad Mustafa Al-Hennawi	Abo Arish-Abha Al-Hennawi Stores	Milk Laban Ice Cream	2,175 Tons 450 » 125 »	2,670,000	11,490,000	14	183	16/3/1400				
33	Al-Salama Dairy Plant (Al-Khansa Al Bin Medeish Bejwi)	Bosha Jazan C/O. Jazan, P.O. Box 158 Tel. 73221191	Pasteurized Milk Pasteurized Laban	800 Tons 3,200 »	1,950,000	7,800,000	10	124	7/4/1404				
34	Mushait Dairy Plant Hasan Bin Saad Bin Mushait	Bisha C/O. Khamis Mushait P.O. Box 167 Tel. 07-2237005	Sterilized Milk Laban Ice Cream Yoghurt White Cheese Labaneh	1,800 Tons 1,300 » 600 » 900 » 81 » 150 »	4,570,000	18,280,000	56	268	21/6/1401				- 38 -
35	Najran Dairy Plant Naser Hammad Al-Jenidy	Najran P.O. Box 305 Tel. 07-5221380	Dairy Products Ice Cream	5,010 Tons 2,100 »	6,150,000	24,600,000	33	257	21/6/1401				
36	Al-Wadi Factory for Dairy Products and Fruit Juices Mohammad Hasan Mohammad Daghreer	Najran P.O. Box 41 Tel. 07522/1448	Dairy Products Ice Cream Fruit Juices	4,650 Tons 600 » 2,000 »	6,210,000	24,840,000	56	481 394	20/10/1400 20/8/1401				

CLASSIFICATION CODE	INDUSTRIAL ACTIVITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	LICENSED PRODUCTION CAPACITY (YEARLY)	AUTHORIZED CAPITAL IN S.R.		No. OF WORKERS	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY
							PAID-UP	TOTAL INV. CAPITAL		No.	DATE	
3112	Dairy Products (Coold)	37	Al Diya Dairy Mohammad Al Daghistani	Tabuk C/O. Riyadh P.O.Box 1253 Tel. 4761208	Sterilized Milk Curd Yoghurt Cheese Ice Cream Labaneh Total	3,600 Tons 1,800 " 600 " 300 " 600 " 150 " 7,050 Tons	4,390,000	18,280,000	72	533	20/11/1400	
		38	Al-Jabalain Dairy Plant Al-Dowah Development Company	Hail C/O. Riyadh P.O.Box 4233 Tel. 4917988 Tel. 4763571	Milk Curd Yoghurt Ice Cream Labaneh White Cheese	1,800 Tons 1,800 " 1,200 " 2,100 " 60 " 150 "	6,500,000	26,000,000	54	144	11/4/1401	
		39	Shady Arar Dairy Plant (Awad Rakan Al Turki)	Arar C/O. Riyadh P.O.Box 8360 Tel. 4646927	Laban Yoghurt White Cheese	2,250 Tons (2.4 Mil. Ltrs.) 750 Tons (600,000 Ltrs.) 81 Tons	4,980,000	9,960,000	37	206	4/6/1400	
		40	Ghadah Dairy Products Factory (Prince Mansour Bin Badr Bin Saud)	Riyadh Villa of H.H. the Prince in Nasereyah.	Yoghurt Labaneh White Cheese	150 Tons 300 " 300 "	5,050,000	10,100,000	24	283	24/7/1400	
		41	Al-Murtan Dairy Products Plant (Ali Ibrahim Al-Abdul Khalik Al-Ghamdi)	Khamm Mushait C/O. Jeddah P.O.Box 3416	Yoghurt Pasteurized Milk White Cheese Ice Cream	2,250 Tons 1,000 " 1,000 " 1,500 "	7,430,000	29,750,000	44	256 32	28/6/1400 6/2/1401	

CLASS					(YEARLY)	PAID-UP	INV. CAPITAL				F CAP & NA	
3112	Dairy Products (Contd.)	42	Sabya Dairy Plant Ibrahim Ali Ibrahim	Sabya C/O Riyadh P.O.Box 40092 Tel. 07-3260580 Tel. 07-3261413	Yoghurt and Laban Labaneh Cheese Ice Cream	1,728 Tons 30 " 60 " 120 "	1,125,000	4,500,000	15	131	8/5/1402	
		43	Saudi Establishment for Cheese Products (Abdul Rehman Al- Saleh Al-Naser AL-Rasheed)	Riyadh P.O.Box 6493 Tel. 477-586	White Cheese Yellow Cheese Yellow Cheese Slides	4,500 Tons 2,000 " 1,500 "	7,440,000	29,770,000	61	200	16/5/1400	
		44	Al-Dulyjan Cheese Plant Mohammad Jasem Abdul Rahman Al-Dulyjan	Riyadh C/O. Kuwait P.O.Box 813 Tel. 433796	White Cheese	300 Tons	755,000	3,020,000	9	550 228	27/12/1401 16/10/1402	
		45	Saudi Dairy Products Co., Ltd. Prince Mansour Bin Met'eb Bin Abdul Aziz	Jeddah-Damma n P.O.Box 381 Tel. 8322935	Cheese	4,680 Tons	15,190,000	60,760,000	94	55 464 110	22/2/1401 17/10/1401 27/3/1404	
		46	Al-Sharkiyyah Dairy Products and Ice Cream Factory	Hafr-Al-Baten C/O. Riyadh P.O.Box 6383	White Cheese Pasteurized Milk Laban Labaneh Yoghurt Ice Cream	94.5 TONS 1,350 " 1,350 " 270 " 1,350 " 540 "	3,670,000	14,680,000	46	399	1/11/1399	

CLASSIFICATION CODE	INDUSTRIAL ACTIVITY	SERIAL No.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	LICENSED PRODUCTION CAPACITY (YEARLY)	AUTHORIZED CAPITAL IN S.R.		No. OF WORKERS	LICENSEE		FOREIGN CAPITAL SHARE & NATIONALITY
							PAID-UP	TOTAL INV. CAPITAL		No.	DATE	
3112	Dairy Products (Capt.)	47	North Dairy Products Plant (Solaiman Al-Ali Aba Al-khail)	Arar C/O. Riyadh P.O.Box 4833	White Cheese Sterilized Milk Laban Labanch Yoghurt Ice Cream	40 Tons 2,700 1,890 162 600	7,750,000	31,000,000	42	164	5/5/1400	
		48	Al-Arbaeen Ice Cream Plant (Dr. Abdul Rahman Taha Bakash)	Riyadh P.O.Box 7520 Tel. 4762224	different types and shapes of Ice Cream	300. Tons	385,000	1,540,000	12	171	8/5/1403	
		49	Al-Hana Food Industries Co. Mohammad Abdullah Al-Jawaid	Riyadh Airport Street Tasheed Al-Balla Bldg.	Ice Cream	830 Tons	2,390,000	10,360,000	30	243 111	28/6/1400 15/4/1402	
		50	Al-Twaijry Ice Cream Factory Mohammad Abdul Aziz Al-Twaijry	Buraidah C/O. Riyadh P.O.Box 8549 Tel. 4778163	Ice Cream	60,000 Ltrs equal 300 Tons	1,115,000	4,460,000	15	363	4/12/1402	
		51	Um Al-Qura Ice Cream Plant	Makkah Azizyah District	Ice Cream equivalent to	374 Tons 748,800 Ltrs.	830,000	3,300,000	17	496	27/10/1400	
		52	Khalifa Al-Qusaibi Ice Cream Factory (Khalifa Abdul Rahman Al-Qusaibi)	Dammam P.O.Box 22	Ice Cream	2,400 Tons	4,800,000	9,600,000	35	244	28/6/1400	

Classification No	Industrial Activity	Sr No	Firm Title	Firm Address	Products	Annual Capacity	Capital (S.R.)		Number of Workers	Licence No. Date	Foreign Capital Share
							Paid Up	Total			
3111	Slaughtering of Livestock and Birds and Preserving Meat thereof	1.	Al-Fullah Meat Factory	Riyadh P.O. Box 804 Tel: 4784625 4779135 Tlx: 201509 SJ	Jerked beef Sausage Hot dog Mince meat Luncheon	100 tons 60 tons 450 tons 300 tons 90 tons	1.68	6.73	23	161 16/4/ 1405	
		2.	Al-Ghadeer Food Factory in Al-Ahsa	Al-Ahsa Hofouf P.O. Box 80 Tel: 35861093	Packed poultry meat Feed concentrates from poultry waste material Soup powder made of chickens	20160 tons 3000 tons 430 tons	9.2	37.1	71	239 18/6/ 1405	
3112	Dairy Products	1.	Najd Dairy Plant	Buraidah P.O. Box 2210 Tel: 3233558 3232595 Tlx: 801305 Talco SJ	Pasteurized milk Laban Yoghurt Sterilized milk White cheese	1900 tons 6350 tons 1270 tons 2550 tons 130 tons	6.1625	24.65	16	174 29/4/ 1405	
		2.	Saudi South Dairy Co. Ltd.	Khams Misahit P.O. Box 751 Tel: 2230764 Tlx: 906636 Telegram: South Dairy Plant	Dairy products and ice cream Juice	8500 tons 500 tons	7.55	30.2	90	245 18/6	

Classifi- cation No.	Industrial Activity	Sr. No.	Firm Title	Firm Address	Products	Annual Capacity	Capital (S.R.)		Number of Workers	Licence		Foreign Capital Share
							Paid Up	Total		No.	Date	
3113	Packing and Preser- vation of Fruits, Legumes and Vegetables and by-products thereof	1.	Al-Oujan Cold Drinks Factory (RANI) (Abdul Wahab, Adel and Adnan Abdul Rahman Al- Oujan)	Dammam P.O. Box 990 Tel: 644-6365	Orange juice (RANI)	5,000,000 cartons	10,550,000 42,200,000	31	84	28/2 1405		
		2.	Al-Zeid Dates Packing Factory (Abdullah Ibrahim Al-Zeid)	Riyadh P.O. Box 41410 Tel: 479-0573	Dates	1,970 tons	3,750,000 15,000,000	34	80	25/2		
		3.	Al-Qaseem Agricul- tural Co. Factory Al Qaseem Agricul- tural Co.	Buraidah P.O. Box 2210 Tel: 233558	Packed dates	5,000 tons	6,317,500 25,270,000	51	78	25/2		
		4.	Eastern Vinegars and Appetizer Factory	Jeddah P.O. Box 8062 Hashem Al-Sayed Husein Al-Haboubi	Vinegars	3,700 tons	2,480,000 9,920,000	25	36	19/2	49% Iraq	
		5.	Al-Ghannam Food- stuffs Packing Factory	Riyadh P.O. Box 16302 Postal Code 11464 Tel: 459-3864	Legumes and cereals Nuts Powder Condiments	1,000 tons 500 tons 300 tons 300 tons	2,000,000 8,000,000	22	152	16/4/ 1405		

1	2	3	4	5	6	7	8	9	
Industrial Activity	Sr. Firm Title	Firm Address	Products	Annual Capacity	Capital Investment	No. of Employees	License No.	License Date	Korwaji Capital Share
Slaughtering of Livestock and Birds and Preserving Meat thereof	1. Abu Amiriyah Factory for Preparation and Processing of Meat	Basrah Jazira P.O. Box 1 Tali 3621652 Cable: Jazira Basrah Abu Amiriyah Poultry	Steaks (beef/lamb) Processed parts of slaughtered animals Meat Hot-dogs	180 tons 170 tons 90 tons 50 tons	900,000 3,600,000	30	149	9/4/ 1406	
		2. National Factory for Meat and Poultry Products	Dammam C/O Al-Nusa P.O. Box 420 Tali 5860818	Hamburger (meat) Hamburger (chicken) Hot-dogs (meat) Fish sticks	1500 tons 500 tons 500 tons 1000 tons	6,000,000 26,000,000	39	235	2/6/ 1406
Dairy Products	1. Al-Mudhah Dairy Plant	Yanbu Al-Bahr P.O. Box 214 Tali 3225132 3223238 Tali 461047 HAYZAI SJ	Laban drink Milk Labanah White cheese Ice Cream Yoghurt	880 tons 300 tons 50 tons 50 tons 940 tons 100 tons	3,850,000 15,400,000	34	31	15/1/ 1406	
		2. Baha Dairy Plant Abdullah Ibrahim Al-Dubai	Riyadh 11421 P.O. Box 860 Tali 4955107 4955561 Tali 205634 DARJEET, SJ	Yoghurt Acid cheese Labanah She-came's milk Laban drink Flavours Byzitan white cheese	1000 tons 500 tons 100 tons 500 tons 1000 tons 1000 tons	2,350,000 9,400,000	22	102	29/2/ 1406

Industrial Activity	Sr. Firm Title	Firm Address	Products	Annual Capacity	Capital Invested (in MILLS)	License No.	Foreign Capital Share
112 (contd.)	3. Al-Nara'ee Co. Ltd.	Jeddah P.O. Box 57667 Riyadh	Dairy products, cream and fresh blancmange Juice	40400 tons 4000 tons	13,032,500 52,130,000	39 20/2/ 1406	47.5% Qatar Iceland
	4. National Agricultural Development Co. (NADSC) NADSC Dairy Plant in Riyadh	Riyadh C/o Riyadh P.O. Box 2537 Tel: 476-4011 Tlx: 203682 Cable: Maradho	Pasteurized milk and various milk products Laban Pasteurized milk Labanah Yoghurt White Cheese	13500 tons 2000 tons 920 tons 920 tons 920 tons	9,325,000 37,300,000	38 203 1/5/ 1406	
113	1. Al-Nurouj Dates Co., Factory	Riyadh P.O. Box 4894 Tel: 4777104	Dates packing in various packages	200 tons	3,300,000 13,200,000	28 25/1/ 1406	
	2. Al-Othman Dates Packing Factory	Bahla P.O. Box 302 Tel: 622-6371 Cable/Al-Othman	Dates packing	3000 tons	5,150,000 20,600,000	32 122 15/3/ 1406	
	3. Al-Munawwarah Juice Factory Abdul Rahman Abdul Aziz Al-Mushalkeh	Buraidah P.O. Box 230 Tel: 3232104 Tlx: 801032 Cable: Al-Nobul Aziz	Various juices	5000 tons	1,125,000 4,500,000	18 109 6/3/ 1406	

KINGDOM OF SAUDI ARABIA

Extract of the Dairy Plans List as indicated
in the

• List of Licenced Factories

in Production
issued under the National Industries Protection and
Encouragement and Foreign Capital Investment Law up
to 1404 H. (1984)

CLASSIFICATION NO.	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRE. JP FIRM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN S.R.		NO. OF WORKERS	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY	REMARKS
							PAID-UP	TOTAL INV. CAPITAL		NO.	Date		
3112	Dairy Products	1	Saudi Danish Dairy Co.	Riyadh P.O. Box 661 Tel. 4982271 Tele. 200709	Pasteurized Milk Flavoured Pasteurized Milk Flavoured yoghurt Drink	6 Million litres 3 Million litres 1.8 Million ..	16,000,000	32,000,000	51	399 104 48 123	21/11/97 21/3/98 2/2/99 26/3/1403	40 % Danish	
		2	The Green Valley Dairy Products, Ice Cream and Juices Factory	Riyadh P.O. Box 1987 Tel. 4982976 Tel. 4982728 Tel. 4028435 Tlx. 204593	Curd Yoghurt Ice Cream Pudding and Custard Juices Cold Tea Water in containers and Jericans	3,300 Tons 3,300 .. 1,000 .. 2,200 .. 2,000 .. 2,000 ..	3,550,000	11,840,000	75	388 67 413	1/11/99 24/2/1400 24/12/1402		
		3	Al-Mara'i Co. Ltd. H.H. Prince Sultan Ibn Mohammad Ibn Saud Al-Kabeer	Riyadh P.O. Box 5824 Tel. 4793248 Tlx. 202329	Dairy products Ice Cream Fruit Juice	18,432.5 Tons 1,460 .. 1,825 ..	13,025,000	52,100,000	88	53	6/2/1402	47.5 % Jersey Canal Islands	
		4	Modern Dairy Plant (Badr Dairy) Mohammad Amin Badrudin Hijazi	Riyadh P.O. Box 8524 Tel. 4764515 Tel. 5442178	Yoghurt Laban White Cheese Labanah	1,100 Tons 750 .. 150 .. 300 ..	1,325,000	5,300,000	30	78	18/3/1402		

CLASSIFICATION NO.	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN S.R.		NO. OF WORKERS	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY	REMARKS
							PAID-UP	TOTAL INV. CAPITAL		NO.	Date		
3112	Dairy Products (contd.)	5	Saudi Arabian Agriculture and Dairy Production Co. Prince Abdullah Al-Faisal Al-Saud	Riyadh P.O. Box 10525 Tel. 4951400 Tel. 4955866 Tlx. 202356	Dairy Products	16,000,000 Gallons	110,950,000	443,800,000	665	56 71 208 453 210	9/3/1396 4/3/1497 11/6/1399 22/12/1402 12/8/1404	12.5 % Lebanese	
		6	Sanabel Trading Industry and Agriculture Co. (Sanabel Dairy Project)	Riyadh P.O. Box 1046 Tel. 4042539 Tlx. 4024977	Pasteurized Milk Yoghurt Butter	5,600 Tons 450 Tons 38 Tons	5,200,000	5,200,000	26	88	10/11/94		- 48 -
		7	Al-Hukair Dairy Factory (Abdul-Mohsen Abdul Aziz Al-Hukair)	Riyadh P.O. Box 359 Al-Badi'a Tel. 4350037	Milk Laban Yoghurt Cheese	2430 Tons 600 Tons 570 Tons 300 Tons	4,400,000	17,600,000	34	68 193	16/12/1392 25/5/1403		
		8	Najd Dairy Factory Suliman Al-Ali Al-Asada	Riyadh P.O. Box 1299 Tel. 4031332	Laban Milk	240 Tons 105 Tons	640,000	640,000	7	85	10/11/94		
		9	Saudi Irish Company	Riyadh P.O. Box 42787 Tel. 4981234 Tlx. 203446	Dairy Products & Ice Cream Cider Orange and Grapes drink. Cider and Orange Juice	14,000 Tons 12,000 Tons 3,000 Tons	10,000,000	40,000,000	96	290 96	23/7/99 8/3/1403	10 % Irish	

CLASSIFICATION NO.	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN S.R.		NO. OF WORKERS	LICENSES		FOREIGN CAPITAL SHARE & NATIONALITY	REMARKS
							PAID-UP	TOTAL INV. CAPITAL		NO.	DATE		
3112	Dairy Products (meat.)	10	Darya Feedstuffs Co. Ltd.	Riyadh P.O. Box 41851 Tel. 4981414 Tel. 4981717	Dairy Products Jules Ice Cream	15,000 Tons 5,000 Tons 3,000 Tons	13,000,000	16,100,000	46	122 287	13/5/1404 24/12/1404	30 % Danish	
		11	Messok Al-Harj Co. Ltd.	Al-Harj Riyadh P.O. Box 8324 Tel. 4793248 Tel. 4776442 Tel. 202329	Liquid and Pasteurized Milk	1,750,000 Ltrs. to be raised to 2,375,000 Ltrs in 1982	4,594,000	18,100,000	13	303	3/9/77	30 % Irish	
		12	Saudi Agricultural Development Company (Saudi Dairy Co.)	Al-Harj C/O Riyadh P.O. Box 5167 Tel. 4955449	Milk Dry Feeder	4,600 Tons 6,258 Tons	14,400,000	14,400,000	61	29 58	7/2/95 29/4/95		
13	Al-Bandaryyah Dairy plant in Sabha (Mansour Hamed Abdullah Al-Sagheer)	13	Al-Bandaryyah Dairy plant in Sabha (Mansour Hamed Abdullah Al-Sagheer)	Al-Harj-Al-Sabha Tel. 4035107	Labas Fresh Milk	2,482,000 Ltrs 2,482,000 Ltrs	7,400,000	13,000,000	24	417	6/10/1400		

CLASSIFICATION NO.	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN S.R.		NO. OF WORKERS	LICENSEE		FOREIGN CAPITAL SHARE & NATIONALITY	REG.
							PAID-UP	TOTAL INV. CAPITAL		NO.	Date		
3113	Dairy Products (cont.)	15	Cattle Raising and Dairy production and Processing Project	Al-Khabeer Al-Qasim (Trafik Abul Rahman Al-Komari)	Dairy Products (Pasteurized Milk) Butter	674.1 Tons to be increased to 1,456 Tons in the Fifth year. 8 Tons to be increased to 17.1 tons in the fifth year.	1,535,213	6,140,850	32	379	11/11/97	25 % German	
		16	Ibn Ammar-Mas-took Dairy Production Plant	Dhurma C/O Riyadh P.O. Box 43155 Tel. 013221416	Fresh Milk and Pasteurization	1,750 Tons to be increased to 2,375 tons	9,100,000	18,200,000	17	54	4/2/1397		
		17	National Dairy Factory (Abdulrah Solaiman Al-Matroudi)	Jeddah C/O Eheber P.O. Box 97	Milk, Laban and butter Liquid yoghurt & Labanah Ice Cream With Milk Fruit Juices	7,051,000 Ltrs. 500,000 Gall. 655,000 Ltrs. 2,312,500 Ltrs.	10,000,000	16,000,000	57	133 149 6	26/3/85 15/4/97 11/1/1401		
		18	Jamjoum Forest Ltd.	Jeddah P.O. Box 6003 Tel. 6361843 Tel. 6364007 Tlx. 400942	Various Milk Products Fruit Drinks	10,000 Tons 5,250 Tons	7,300,000	29,200,000	90	46 222 236	19/3/95 23/6/96 22/6/1401	51 % USA	

CLASSIFICATION NO.	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN S.R.		NO. OF WORKERS	LICENSE		FIRM'S CAPITAL SHARE & NATIONALITY	
							PAYD-UP	TOTAL INV. CAPITAL		NO.	DATE		
3113	Dairy Products (contd.)	19	Orizawi Asian Trading Co., Ltd. Dairy Products Branch (Dr. Ahmad Medhat and Imasad Hamdi Al-Jabi)	Jeddah P.O. Box 3981 Tel. 6432031 Tel. 6372965 Tlx. 400558	Sterilized Milk Curd Yoghurt Cheese Ice Cream Labanah	3,600 Tons 1,800 Tons 600 Tons 300 Tons 600 Tons 150 Tons	3,000,000	20,000,000	72	378	14/9/1400		
										507	5/11/1400		
										394	2/12/1403		
		20	Saudi Dairy Products Factory Bahbah Dairy Farm	Jeddah Tel. 6322661 Tel. 6822709 Tlx. 401402	Fresh Milk and Products thereof	735 Tons	700,000	2,800,000	63	10/1/91			
		21	Al-Dhabet National Dairy Products Plant Tayseer Khalil Al-Dhabet	Taif-Hamas Ibn Thabet Street P.O. Box 123	Dairy Products	4,500 Tons	3,150,000	12,600,000	35	63 273	11/2/96 21/10/96		
		22	Medinah Danish Dairy Co. Ltd. (Ahmed Bairy Mohammad Nash)	Medinah P.O. Box 2996 Tel. 8363010	Full Cream Milk Laban Labanah Yoghurt White Cheese Ice Cream Julem Fruit Juices	3,400 Tons 900 Tons 360 " 720 " 600 " 1,042 " 1,500 " 1,500 "	10,500,000	42,000,000	82	184 276 91	20/5/1400 8/7/1401 27/7/1404	65 % Kuwaiti 5 % Danish	

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							PAID-UP	TOTAL INV. CAPITAL		NO.	DATE		
3112	Dairy Products (cont.)	23	Medinah Ice Cream and Dairy Factory (Ahsaf Hasan Al-Sherbail)	Medinah P.O. Box 1367 Tel. 5211305	Lassis Drink Milk Labanah Yoghurt Ice Cream	300 Tons 300 " 300 " 300 " 340 "	950,000	3,810,000	20	326	22/8/1400		
		24	Al-Ahsaf Dairy Plant (Khalid Ahmad Saad Al-sady)	Dammam P.O. Box 6282 Tel. 8376621 Tlx. 602008	Dairy Products and Ice Cream	2,870 Tons	1,400,000	6,500,000	35	332	12/11/98		
		25	Arabian Food Establishment Hassan Abdul Karim Al-hassani	Dammam C/O Khobar P.O. Box 195 Tel. 8376325 Tel. 8374752 Tlx. 670031	Dairy Products Sandwiches Ice Cream in Sticks, Biscuits and Cups Orange Juice Cider Pineapple Juice Grape Juice	2,900 Tons 9,000,000 units 3,200 Tons 360 " 360 " 360 " 360 "	5,317,500	21,270,000	89	320 206 173	20/9/97 14/7/1400 10/5/1404		
		26	Gulf Danish Dairy Company Sheikha Nair Al-Sawah	Dammam P.O. Box 3360 Tel. 8643440 Tel. 8947029 Tlx. 671022	Dairy Products Ice Cream Juices Fruit Juices	8,115 Tons 900,000 Ltrs 1,500 Tons 1,500 "	8,125,000	32,500,000	51	400 82 248 121 415 399	25/11/97 24/2/99 4/7/1400 28/3/1401 28/11/1401 27/10/1402	49 % Kuwait 5 % Danish	

CLASSIFICATION NO.	INDUSTRIAL ACTIVITY	FARM NO.	NAME OF FARM	ADDRESS OF FARM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN U.S.		NO. OF WORKS	LICENSES		FORMER CAPITAL SHARE & NATIONALITY	REMARKS
							Paid-Up	TOTAL NET CAPITAL		NO.	DATE		
511	Dairy (Farms owned)	31	The South S.I. Concrete and Supply Dairy Farm Samb Elshah San Yeh Al-Sabary	El-Shay (Al-Khakh) P.O. Box 216 Tel. 631463 Tlx. 612616	Milk Lemon yogurt Cheese	3,000 Tons 120 Tons 20 Tons	1,100,000	3,500,000	15	115	24/4/196		
							3,112,200	11,300,000	44	173 205 206	4/12/197 24/10/196 3/11/1968		
							47,112,500	100,210,000	326	121 434 120	9/10/195 9/11/196 10/7/1961		
							3,975,000	11,300,000	15	25	10/11/1963	25 W Mixed	The Foreign Printer & South Maroon Co.
28	Al-Masrah Agricultural Farming Co. (Al-Khakh and Ibrahim Saadun Al-Masrah)	28	Al-Masrah Dairy Factory	Al-Khakh Al-Masrah P.O. Box 212 Tel. 632006 Tlx. 2006 Al-Shahara village	Dairy Products Ice Cream	4,000 Tons 100 "	3,112,200	11,300,000	44	173 205 206	4/12/197 24/10/196 3/11/1968		
							47,112,500	100,210,000	326	121 434 120	9/10/195 9/11/196 10/7/1961		
							3,975,000	11,300,000	15	25	10/11/1963	25 W Mixed	The Foreign Printer & South Maroon Co.
28	Al-Masrah Agricultural Farming Co. (Al-Khakh and Ibrahim Saadun Al-Masrah)	28	Al-Masrah Dairy Factory	Al-Khakh Al-Masrah P.O. Box 212 Tel. 632006 Tlx. 2006 Al-Shahara village	Milk Curd Butter Ice Cream Lemon drink Cheese Loban Juice	12,000 Tons 3,000 " 1,500 " 2,500 " 45,000 " 1,500 " 1,200 " 10,000 "	1,100,000	3,500,000	15	115	24/4/196		
							3,112,200	11,300,000	44	173 205 206	4/12/197 24/10/196 3/11/1968		
							47,112,500	100,210,000	326	121 434 120	9/10/195 9/11/196 10/7/1961		
28	Al-Masrah Agricultural Farming Co. (Al-Khakh and Ibrahim Saadun Al-Masrah)	28	Al-Masrah Dairy Factory	Al-Khakh Al-Masrah P.O. Box 212 Tel. 632006 Tlx. 2006 Al-Shahara village	Fresh Loban Fresh Milk	7,200 Tons 3,600 "	3,975,000	11,300,000	15	25	10/11/1963	25 W Mixed	The Foreign Printer & South Maroon Co.
							47,112,500	100,210,000	326	121 434 120	9/10/195 9/11/196 10/7/1961		
							3,975,000	11,300,000	15	25	10/11/1963	25 W Mixed	The Foreign Printer & South Maroon Co.

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							PAID-UP	TOTAL INV. CAPITAL		NO.	DATE			
3112	Dairy Products (contd.)	31	Saudi Southern Dairy Co. Saeed bin Ali Bin Mubait	Khamis Mubait P.O. Box 70 Tel. 7053	Milk, dairy Products and Ice Cream	8,500 Tons	7,500,000	30,000,000	90	45	6/3/99			
										361	6/10/99			
										459	3/11/1404			
		32	Ghamed Dairy Factory Ahmad Mohammed Mesh Al-Ghamedi	Bajurabi C/O Al-Baba Almoakha Bajurabi Tel. 077220970	Yoghurt Laban Drink Labasch	1,040 Tons 600 " 360 "	1,000,000	4,000,000	7	205	5/7/1402			
33	Al-Hasaky Factory for Dairy Products Saleh Al-Mutlaq Al-Hasaky	Tabuk C/O Riyadh P.O. Box 1738	Milk Laban drink Yoghurt Ice Cream	2,000 Tons 1,300 " 900 " 300 "	4,570,000	18,300,000	28	165	5/5/1400					
								443	14/9/1401					
								544	30/11/1401					
34	Al-Sabra Dairy Factory Abdulkahman Saleh Al-Rasheed	Tabuk P.O. Box 391 Tel. 4234648 Tlx. 202673	Pasteurized Milk Pasteurized Laban Yoghurt Butter Cream	1,080 Tons 1,620 Tons 225 " 36 " 36 "	2,000,000	8,000,000	13	349	12/8/1404					
35	Al-Tokbat Dairy Factory Abdullah Moh'd Al-Tokbat	Hail P.O. Box 333 Tel. 3323666	Pasteurized Milk Laban Cheese and Cream and other dairy Products	500 Tons 500,000 Litrs. 1,050 Tons equal 1,050,000 Litrs. 250 Tons 250,000 Litrs.	1,566,500	6,346,000	23	196	28/5/1403					

ARAB	INDUSTRIAL ACTIVITY	SERIAL NO.	NAME OF FIRM	ADDRESS OF FIRM	PRODUCTS	(ANNUAL) LICENSED PRODUCTION CAPACITY	AUTHORIZED CAPITAL IN S.R.		N. OF WORKERS	LICENSE		FOREIGN CAPITAL SHARE & NATIONALITY	REMARKS
							PAID-UP	TOTAL INV. CAPITAL		NO.	Date		
	Dairy Products (Contd.)	36	Saudi Danish Dairy Co., Ltd	Jeddah P.O. Box 5043 Tel. 6361440 Tlx. 40153H	Yoghurt Laban Cheese Ice Cream Milk Cream	7,380 Tons 6,030 .. 900 .. 8,340 .. 27,660 .. 46H ..	14,980,000	59,674,000	271	1287 116 379 316 280	22/4/94 6/10/95 23/11/98 3/9/1401 28/11/1404	40% Danish 48% Kuwaiti	
37		Halawani Dairy Products and Ice Cream Factory (Mohammed Munir Abdul Hameed Halawani)	Jeddah P.O. Box 5034 Tel. 6369810 Tlx. 40111H	Yoghurt Strained Yoghurt Laban with oil White Cheese Ice Cream Total	300 Tons 450 .. 225 .. 1,400 .. 600 .. 2,975	2,000,000	6,900,000	40	22	20/1/1400			
38		Hanwah Dairy Products Factory (Hamzath Siraj Mans)	Makkah P.O. Box 1660 Tel. 5434867	Yoghurt	1,200 Tons	600,000	2,420,000	10	166	5/5/1400			
39		Al-Ghamdi Dairy Plant (Abi Ahmad Mesfer Al-Ghamdi)	Tabuk Al-Ghamdi Cold Store P.O. Box 21581	Yoghurt	2.5 million Cans	1,420,000	1,420,000	10	166 366	17/10/98 7/8/1401			

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							PAID-UP	TOTAL INV. CAPITAL		NO.	Date		
3112	(Dairy Products (second))	40	Hilwani Cheese Plant (Muhammad-Munir Abdul Hamed Hilwani)	Jeddah P.O. Box 690 Tel. 6369810 Tel. 6366496	Processed Cheese in triangle shape and Pieces	1500 Tons	2,230,000	7,700,000	32	18 331	20/1/1400 19/7/1401		
		41	Saudi Food Industries CO Ahmad Saad Sa-Samh	Jeddah New Street, P.O. Box 8261 Tel. 6403496 Tlx. 40472	Frozen Butter Canned Butter Stock Cubes Cereals Based Food Powdered Soup	996 Tons 2070 Tons 1,000 " 1,000 " 1,000 "	7,275,000	20,830,000	160	48	3/2/1402	51% Swiss	56
		42	Ice Cream Plant (Muhammad Rafe Mahmuud Saleh)	Riyadh P.O. Box 1618 Al-Foos-Al-Andalus Street Tel. 4021936	Ice Cream	370 Tons	185,000	185,000	15	202	2/1/1390	100% Syrian	
		43	Onaash Ice Cream Plant Fahd Al-Abdul Aziz Al-Jabul	Onaash P.O. Box 354	Ice Cream	840 Tons	1,970,000	6,070,000	13	314	11/8/99		
		44	Saudi Ice Cream Plant	Jeddah P.O. Box 2512 Tel. 6360807 Tel. 6365184 Tlx. 402612	Ice Cream From Milk Powder: First Year Second Year Third Year Fourth Year Fifth Year	690 Tons 900 Tons 1,800 " 1,200 " 1,500 "	1,750,000	5,970,000	106	256 140	2/7/99 10/4/1401		

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							PAID-UP	TOTAL INV. CAPITAL		NO.	Date		
3112	Dairy Products (contd).	45	Ice Cream, Dairy Products and Soft Drinks Manufacturing Company (Fine products)	Jeddah P.O. Box 5700 Tel. 6472802 Tlx. 401062	Ice Cream	1,500 Tons	2,500,000	2,500,000	26	183 367 317	15/6/88 21/9/99 7/9/1400	35 % French	
		46	Mohammad Batterjey Market Ice Cream Factory (Mohammad Ibrahim Batterjey)	Jeddah P.O. Box 2694 Tel. 6519427 Tel. 6365164 Tlx. 402512	Ice Cream Lollipops Ice Cream Yoghurt Ice Cream Ice Cream used in manufacturing Ice Cream Cakes	2,400,000 Ltrs 600,000 ,, 1,800,000 ,, 300,000 -	4,010,000	16,050,000	44	44	11/2/1400		- 57 -
		47	Um Al-Qura Ice Cream plant Salem Bin Abdullah Bin Matar Al-Bogmi	Makkah P.O. Box 1655 Tel. 5747290 Tel. 5588374	Ice Cream	1,200 Tons	675,000	2,700,000	26	412	21/9/1404		