



***"Facilitating Trade Flows  
Between WBS and Israel Project"***

**Al Montar / Karni Terminal Movement Monitoring  
Monthly Report- April 2007**

**Prepared by Palestine Trade Center - PalTrade  
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**July 1<sup>st</sup>, 2006 – June 30<sup>th</sup>, 2007**

Al-Bireh, Al-Watanieh Towers Bldg. 5th floor  
Ramallah - P.O. (Box 883)  
Phone ++ 02-2408383 Fax: ++ 02-2408370

Gaza – Al Rimal, Bank of Palestine Bldg. 10th floor  
Gaza P.O. (Box 5180)  
Phone : 08-2833539 Fax: ++ 08-2833549

[www.paltrade.org](http://www.paltrade.org)

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## 1- Introduction

As the National Trade Development Organization, PalTrade is the private sector institution with a direct mandate in trade development. As such, PalTrade has been a member of the Gaza withdrawal technical committees, and made important contributions to the reports to the AHLC on trade development and facilitation and other related forums. PalTrade is a founder and member of the Private Sector Coordinating Council (PSCC), a consortium of all major private sector institutions, and an important partner of industry and service associations. PalTrade was also the only private sector institution to participate in negotiations on movement and access during and following the Israeli withdrawal from Gaza.

As part of the World Bank project "Facilitating Trade Flows between WBGs and Israel" and previous projects, PalTrade has maintained a physical presence at AIMontar/ Karni since August 24th, 2005 until present, PalTrade's scope is to monitor and collect statistics for AIMontar terminal operations, monitor queuing duration and exported cargo volumes. AIMontar terminal statistics have been collected in full collaboration with AIMontar authorities; mainly representative offices of Border & Passage General Dept., Ministry of Civil Affairs and Ministry of National Economy.



**AIMontar Terminal** is considered the major commercial terminal of Gaza Strip, where it connects the Gaza Strip with the West Bank, Israel and the rest of the world, the terminal is located at the east of Gaza City and deemed the lifeline for the inhabitants of the Gaza Strip, but is marred by inefficiency and insecurity.

## 2- Technical Observation (Cargo Flow)

The statistics presented in this monthly report are the result of observations at AIMontar/Karni covering 26 available operating days from April 1<sup>st</sup> to 30<sup>th</sup>, 2007. In the month of April, 2007, the terminal operated for both imports and exports.

### IMPORTS:

A total of 11,392 truckloads of goods were imported into the Gaza Strip. The highest volume of imports was aggregates (60%), followed by mixed cement-silo (10%) and full containers (8%).

Most of the goods imported were processed through cells and silo cement hoppers. The containers terminal (area 34) was open for empty and full containers, including aggregates. Based on AI Montar Terminal Authority estimates, the pallet scanners operated with a 8% capacity during the month of April for imports (they are only used for imports from the West Bank).

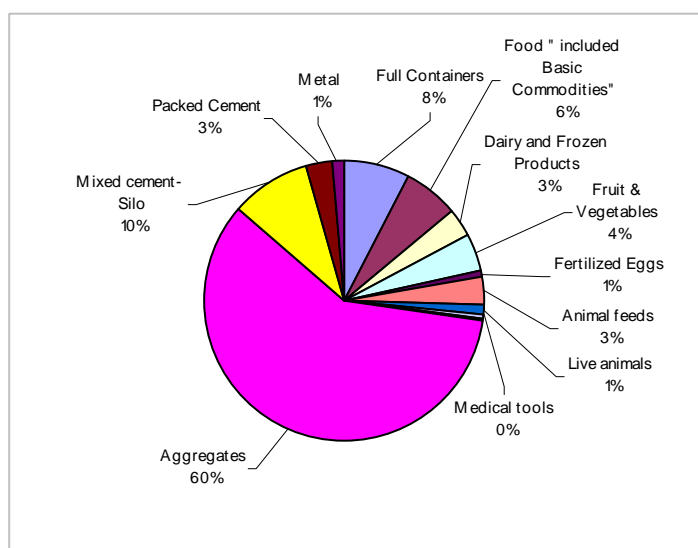


Figure (1): Imported truckloads movement through AIMontar Terminal, classified by Cargo type- April 2007

**EXPORTS:**

A total of 1,173 truckloads of exports were reported during the study period. All exports were processed through pallet scanners and cells. The highest volume of exports was agricultural produce (48%), followed by furniture (9%) and garment (7%). An additional 161 truckloads of empty boxes and crates and 1,176 empty containers were processed through the terminal from Gaza to Israel.

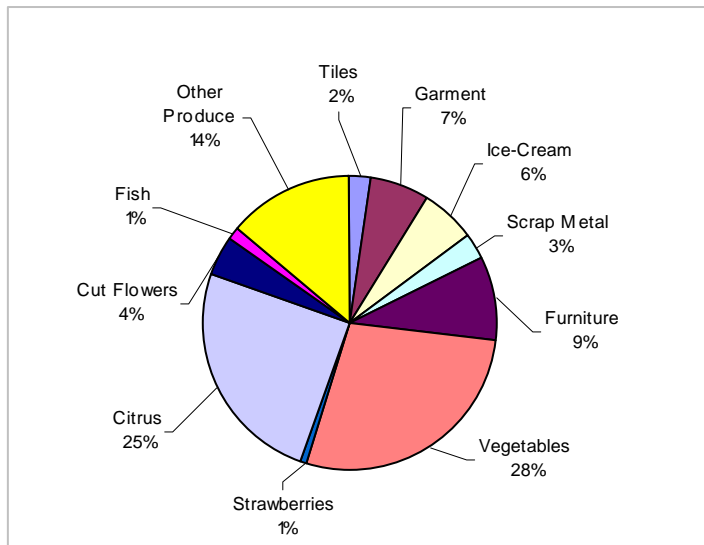


Figure (2): Exported truckloads movement through AIMontar Terminal, classified by Cargo type- April 2007

**3- Operation Performance**

The terminal operated (imports & exports) for 22 working days (85% of total available working days in the study period). The terminal was totally closed for four days by the Israelis (3 for holidays and 1 for security reasons).

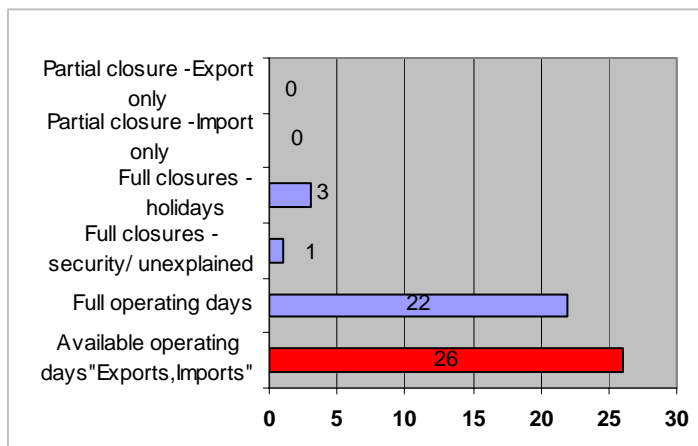


Figure (3): Operation and closures at AIMontar / Karni during April, 2007

The highest daily **working hours** were observed on April 12<sup>th</sup>, 18<sup>th</sup>, 19<sup>th</sup>, and 29<sup>th</sup> where the terminal operated for 13 hours, which is just 93% of the daily working hours previously recorded (i.e. prior to February 2006; 14 working hours). The average daily working hours during April were 7 hours, with the shortest working day observed at only 3.3 hours on April 23<sup>rd</sup>.

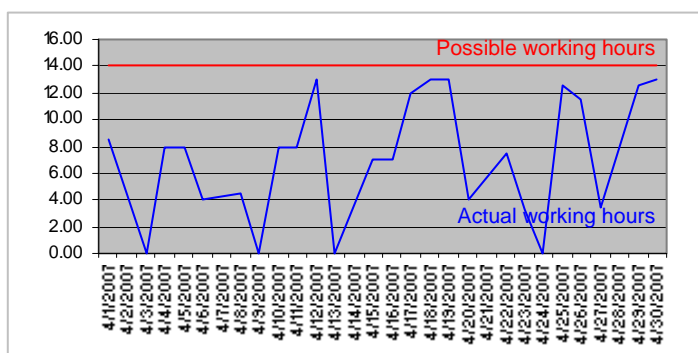


Figure (4): AIMontar / Karni Terminal opening hours during – April, 2007

Noting that the official working hours at the terminal were extended from 5:30 pm until 11pm, starting from April 12<sup>th</sup> 2007.

The highest daily **import volumes** were observed on April 29<sup>th</sup> where 748 truckloads were processed, while the lowest daily import volumes were observed on April 2<sup>nd</sup> with only 146 truckloads crossing into Gaza.

The average daily import volume during the study period was estimated at 438 truckloads per day.

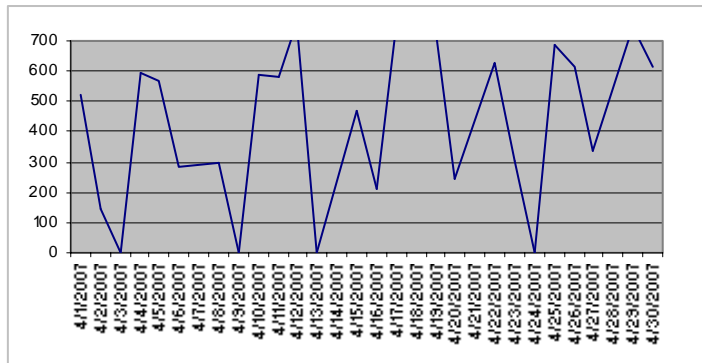


Figure (5): Imported truckloads movement through Al Montar Terminal- April, 2007

The highest daily **export volumes** were observed on April 22<sup>nd</sup> where 86 truckloads were processed, while the lowest daily export volumes were observed on April 23<sup>rd</sup> with only 14 truckloads crossing out of Gaza.

The average daily export volumes during the study period was estimated at 53 truckloads per day excluding closure days, Including closure days, the average drops to 45 truckloads per day, which is estimated at 69% of previously observed daily average (prior to February 2006, where the average daily import volume was estimated at 65 truckloads).

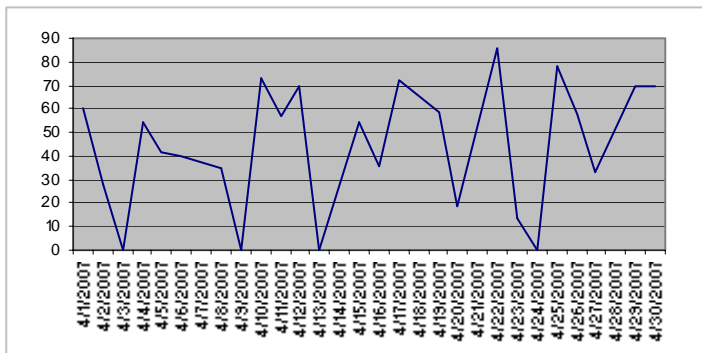


Figure (6): Exported truckloads movement through Al Montar Terminal-April, 2007

## PERFORMANCE CONCLUSION

Although opening hours at the terminal were officially extended, the average daily imports increased by around 20% and the average daily exports have only increased by 3%!!!.; It can be noticed that the operation days have also decreased with 4 days of total closure due to the holidays and security reasons.

## 4- Cargo Movement Trends – April (2001-2007)

The cargo **import** movement average of April 2007 is better than the April averages of recent years (but not as good as the year 2005). This month's **export** average is considered better than last years' (but not as good as the years 2002 and 2003).

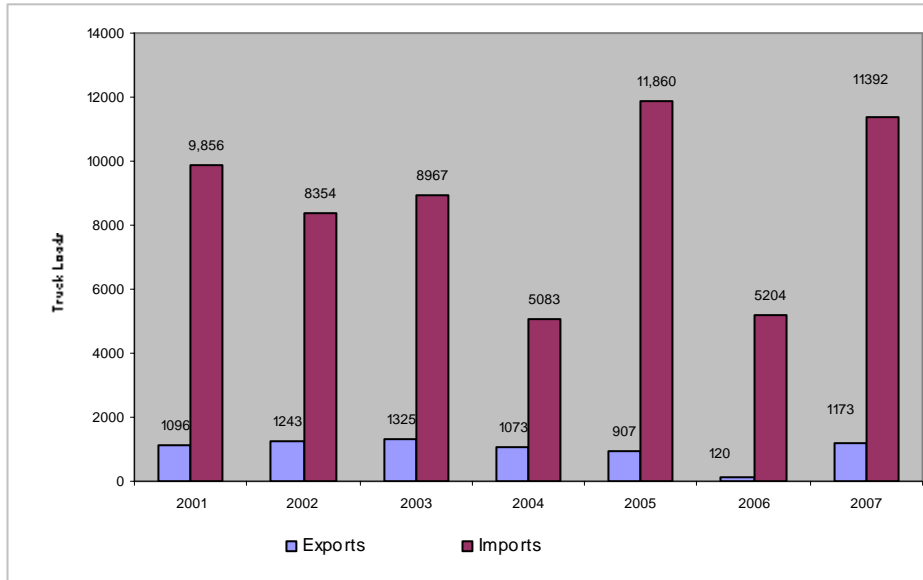


Figure (7): April truckloads movement (imports and exports) for the period (2001-2007)

## 5- Terminal Performance Trends – (July, 2006 – April, 2007)

Statistical trends of the months from July 2006 to April 2007 show that the export levels were slightly increasing until the month of January, but started to decrease afterwards. With regard to import levels, it's a fluctuating trend; noting that this month it reached its highest observed level during this timeline. In terms of operational days, the number of closures due to security reasons has greatly decreased since August 2006, but is still relevant.

As illustrated in Figure (8), in the month of April total imported and exported truckloads have increased but in a smaller ratio compared to the extended opening hours.

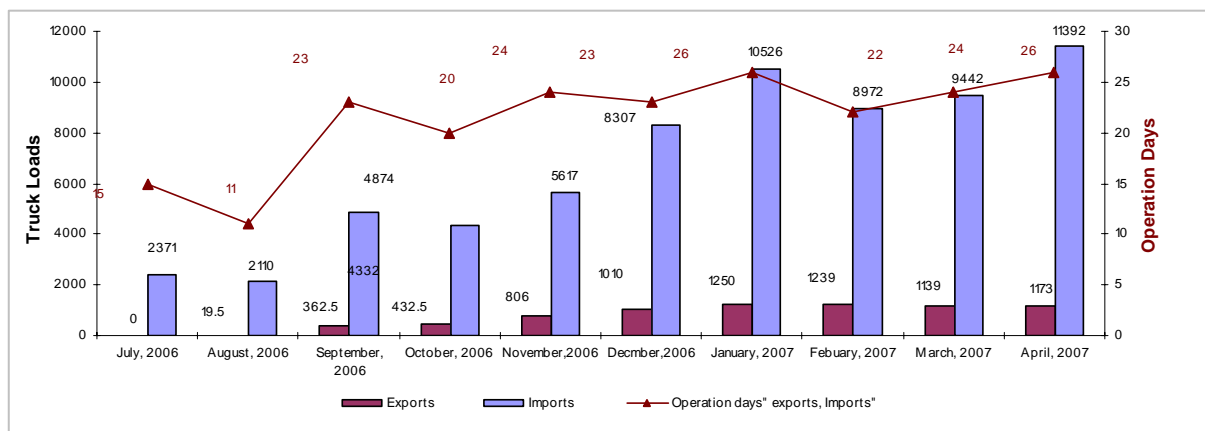


Figure (8): July 2006 – April 2007 truckloads movement (imports, exports & operation days).

## 6- EXPORT SECTORS PERFORMANCE (Pilot Observation)

### Furniture Sector:

Based on the export applications received at the Wood Industries Union (WIU), which is the sector representative association responsible for the export queuing procedure, This April the total furniture export demand was 468 truckloads, however, 41% of the total demand was scheduled for exports based on the terminal's observed capacity, but only 49% of the scheduled exports (or 20% of the sector export demand) were actually exported.

In comparison with the previous month of March the total actual exports decreased by 34 truckloads, however the percentage of demand vs. actual exports decreased from 21% to 20%.

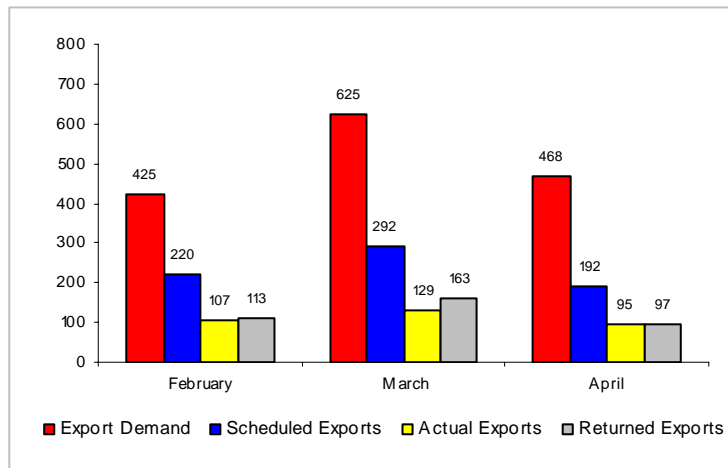


Figure (9): Furniture Sector Demand Vs. Actual Exports in February - April 2007

### Garment Sector:

Based on the export information gathered by the at the Sewing Factory Owners Union (SFOU), which is the sector representative association, This April the total garment export demand was 260 truckloads, however, 70% of the total demand was scheduled for exports based on the terminal's observed capacity, but only 41% of the scheduled exports (or 29% of the sector export demand) were actually exported.

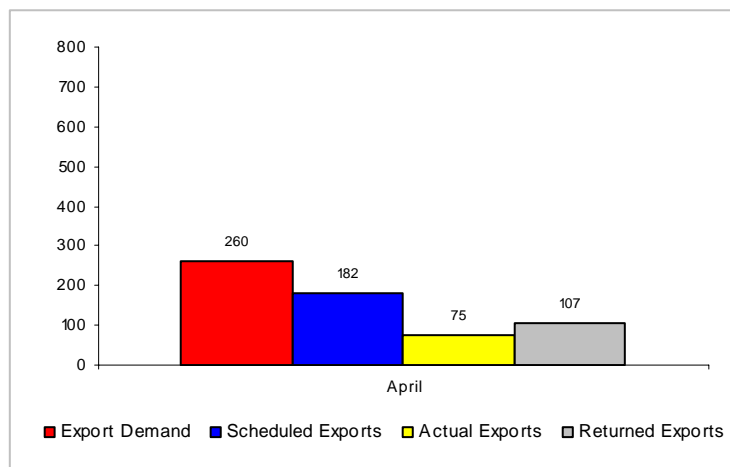


Figure (10): Furniture Sector Demand Vs. Actual Exports in February - April 2007

## “Analysis of Extended Hours” at AlMontar Terminal

In order to better understand the effect of the extended opening hours on the performance of AlMontar Terminal, a detailed comparison is exemplified below between the periods of March 12 – 30, 2007 (official opening hours until 5:30pm) and April 12 –30, 2007 (official opening hours until 11:00pm).

### Terminal Operations:

Although the average official opening hours have increased by 56%, the average actual working hours have only increased by 33%. In terms of goods movement the average daily imports increased by around 28% while the average daily exports increased by only 11%.

Period	Average Exported Trucks/day	Average Imported Trucks/day	Official Working Hours/day	Average Actual Opening Hours/day
March 12-30, 2007	44	380	9	6
April 12-30, 2007	49	488	14	8
% Change	+ 11%	+ 28%	+ 56%	+ 33%

### Types of Cargo:

In terms of types of cargo, as only certain areas of the terminal operate until 11pm, the considerable increase was noticed in certain types of goods for both imports and exports.

With regard to *imports*, the increase was mainly in animal feeds, aggregates, and mixed cement-silo as indicated in the table below:

Period	Aggregates	Mixed Cement - Silo	Live Animals	Fruits & Vegetables	Full Containers	Animals Feed
March 12-30, 2007	161.2	30.1	8.1	17.5	29.1	5.1
April 12-30, 2007	291.2	47.0	6.5	22.2	35.0	17.3
% Change	+81%	+56%	-19%	+26%	+20%	+242%

With regard to *exports*, the increase was mainly in scrap metal and citrus as indicated in the table below:

Period	Furniture	Garment	Citrus	Vegetable	Fish	Scrap Metal
March 12-30, 2007	5.2	3.8	6.9	16.0	0.5	0.8
April 12-30, 2007	5.8	3.9	14.4	17.3	0.8	2.0
% Change	+11%	+4%	+107%	+8%	+45%	+143%

### General Notes for Consideration:

The following points were noticed in the period of April 12<sup>th</sup>- 30<sup>th</sup>:

1. The terminal instead of starting its operations at 8:00 am, in this period its operations started at 9:30 am.
2. Out of a total of 8 pallet scanners, on average 5 operates for exports in the morning shift (8:00 am – 5:30pm) while on average only 2 operates for exports in the evening shift (6:00 pm – 11:00pm) with notable reduced efficiency.
3. Out of a total of 11 cells, on average 4 operates for both imports and exports in the morning shift (8:00 am – 5:30pm) while on average only 2 operates (mostly imports over exports) in the evening shift (6:00 pm – 11:00pm) with notable reduced efficiency.

## ANNEX 1

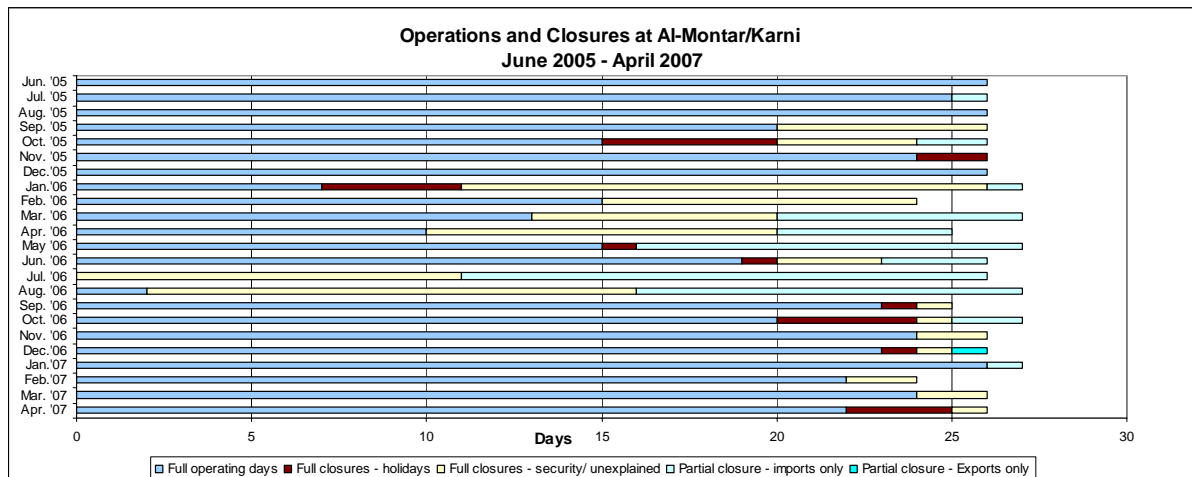
### AlMontar/Karni Cargo Movement Statistics - April 2007

Day	Date	Exported Trucks	Imported Trucks	Terminal Opening Hours	Empty Crates (truck)	Empty Containers	Notes
Sunday	4/1/2007	60	522	8.5	8	0	Full operating days
Monday	4/2/2007	28	146	4.5	2	35	Full operating days
Tuesday	4/3/2007	0	0	0.0	0	0	Full closures - holidays
Wednesday	4/4/2007	54	594	8.0	13	90	Full operating days
Thursday	4/5/2007	42	567	8.0	0	59	Full operating days
Friday	4/6/2007	40	282	4.0	3	50	Full operating days
Sunday	4/8/2007	35	296	4.5	5	44	Full operating days
Monday	4/9/2007	0	0	0.0	0	0	Full closures - holidays
Tuesday	4/10/2007	73	588	8.0	5	78	Full operating days
Wednesday	4/11/2007	57	583	8.0	10	90	Full operating days
Thursday	4/12/2007	70	762	13.0	8	65	Full operating days
Friday	4/13/2007	0	0	0.0	0	0	Full closures - security/ unexplained
Sunday	4/15/2007	54	472	7.0	8	77	Full operating days
Monday	4/16/2007	36	211	7.0	4	15	Full operating days
Tuesday	4/17/2007	72	763	12.0	8	77	Full operating days
Wednesday	4/18/2007	65	727	13.0	18	56	Full operating days
Thursday	4/19/2007	59	708	13.0	16	76	Full operating days
Friday	4/20/2007	19	247	4.0	5	80	Full operating days
Sunday	4/22/2007	86	625	7.5	4	76	Full operating days
Monday	4/23/2007	14	303	3.3	2	37	Full operating days
Tuesday	4/24/2007	0	0	0.0	0	0	Full closures - holidays
Wednesday	4/25/2007	78	685	12.5	15	62	Full operating days
Thursday	4/26/2007	58	611	11.5	8	73	Full operating days
Friday	4/27/2007	33	337	3.5	8	36	Full operating days
Sunday	4/29/2007	70	748	12.5	3	0	Full operating days
Monday	4/30/2007	70	615	13.0	8	0	Full operating days
<b>Total</b>		1173	11392	186.3	161	1176	

## ANNEX 2

### Operations and Closures at AlMontar / Karni June 2005 - April 2007

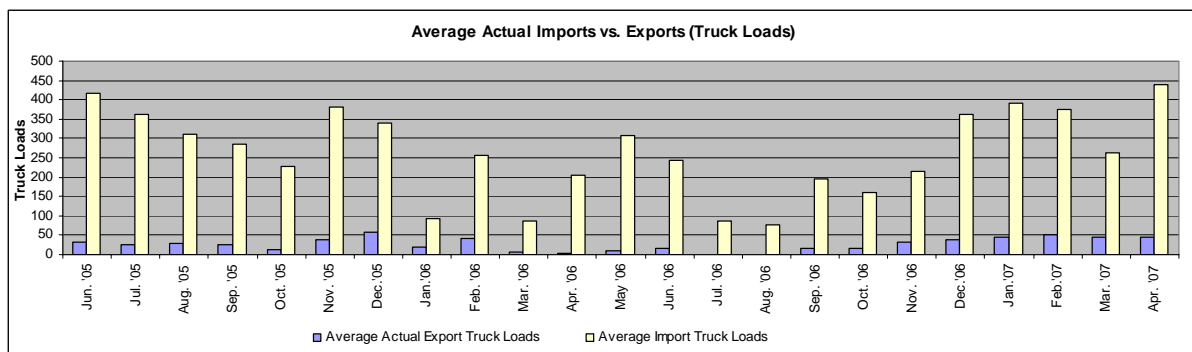
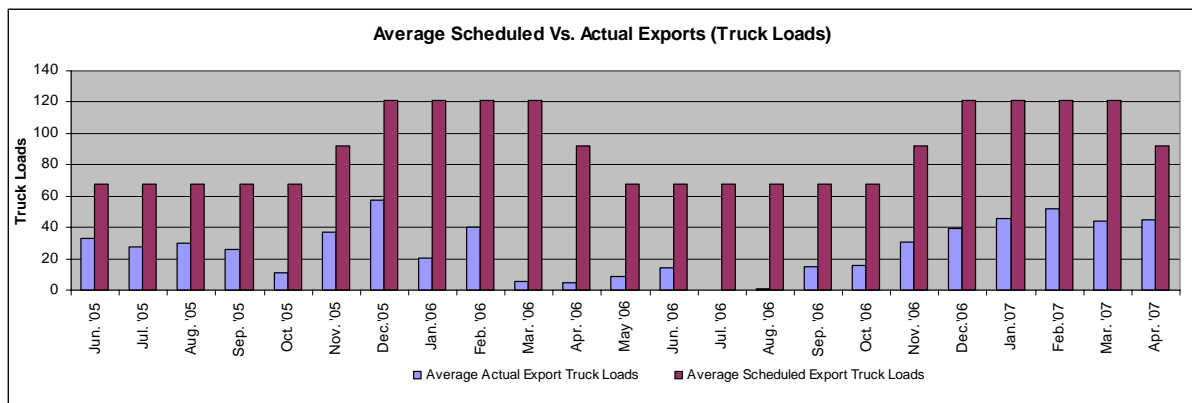
Month	Available Operating days	Full Operating Days	Full Closures - Holidays	Full Closures - Security/ Unexplained	Partial Closure - Imports Only	Partial Closure - Exports Only
Jun. '05	26	26	0	0	0	0
Jul. '05	26	25	0	0	1	0
Aug. '05	26	26	0	0	0	0
Sep. '05	26	20	0	6	0	0
Oct. '05	26	15	5	4	2	0
Nov. '05	26	24	2	0	0	0
Dec. '05	26	26	0	0	0	0
Jan. '06	27	7	4	15	1	0
Feb. '06	24	15	0	9	0	0
Mar. '06	27	13	0	7	7	0
Apr. '06	25	10	0	10	5	0
May '06	27	15	1	0	11	0
Jun. '06	26	19	1	3	3	0
Jul. '06	26	0	0	11	15	0
Aug. '06	27	2	0	14	11	0
Sept. '06	25	23	1	1	0	0
Oct. '06	27	20	4	1	2	0
Nov. '06	26	24	0	2	0	0
Dec. '06	26	23	1	1	0	1
Jan. '07	27	26	0	0	1	0
Feb. '07	24	22	0	2	0	0
Mar. '07	26	24	0	2	0	0
Apr. '07	26	22	3	1	0	0



## ANNEX 3

### Average Daily Number of Scheduled and Actual Export Truckloads

Month	Average Actual Export Truckloads	Average Scheduled Export Truckloads	Average Import Truckloads
Jun. '05	33	68	416
Jul. '05	27	68	362
Aug. '05	30	68	311
Sep. '05	26	68	286
Oct. '05	11	68	227
Nov. '05	37	92	381
Dec.'05	57	121	341
Jan.'06	20	121	94
Feb. '06	40	121	257
Mar. '06	5	121	87
Apr. '06	5	92	206
May '06	9	68	307
Jun. '06	15	68	244
Jul. '06	0	68	88
Aug. '06	1	68	78
Sep. '06	15	86	195
Oct. '06	16	68	160
Nov. '06	31	92	216
Dec.'06	39	121	361
Jan.'07	46	121	390
Feb.'07	52	121	374
Mar. '07	44	121	263
Apr. '07	45	92	438



## ANNEX 4

### Actual Vs. Planned Working Hours Exporting Pallet Scanners "Bays" and "Cells"

Month	Pallet Scanners "Bays"			Cells		
	Actual Daily Working Hours (cargo)	Planned Daily Working Hours (cargo)	Pallet Scanners "Bays" Ratio of Actual vs. Planned Working Hours	Actual Daily Working Hours (cargo)	Planned Daily Working Hours (cargo)	Cells Ratio of Actual vs. Planned Working Hours
Jun. '05	26	91	29%	13	65	20%
Jul. '05	27	91	30%	10	65	16%
Aug. '05	30	91	33%	13	65	20%
Sep. '05	33	91	36%	10	65	15%
Oct. '05	14	91	15%	3	65	5%
Nov. '05	33	91	36%	16	65	24%
Dec. '05	41	91	45%	25	65	38%
Jan. '06	45	91	49%	13	65	20%
Feb. '06	39	91	43%	26	65	40%
Mar. '06	25	91	27%	15	65	23%
Apr. '06	23	91	25%	9	65	14%
May '06	28	91	31%	9	65	14%
Jun. '06	20	91	22%	8	65	12%
Jul. '06	0	91	0%	0	65	0%
Aug. '06	0	91	0%	0	65	0%
Sep. '06	11	91	12%	5	65	8%
Oct. '06	16	91	18%	9	65	14%
Nov. '06	21	91	23%	11	65	17%
Dec. '06	29	91	32%	14	65	22%
Jan. '07	32	91	35%	16	65	25%
Feb. '07	30	91	33%	23	65	35%
Mar. '07	31	91	34%	20	65	31%
Apr. '07	38	91	42%	24	65	37%

