The German FF&V Market Opportunities & Challenges

ENPARD seminar

Husam Al Dakak
FF&V Sourcing & Marketing Consultant
11.07.2017 // Ramallah
AGENDA

• Country Overview
• About the German FF&V Market
• Market Trends
• Market Requirements & Regulations
• Products in Focus
• More Potential
• Thoughts worth sharing
PERSONAL INTRO. – HUSAM AL DAKAK

• SYRIAN / GERMAN

• B.A. IN BUSINESS ADMINISTRATION

• M.A. IN ECONOMICS

• WORK EXPERIENCE:
  • DEVELOPMENT FIELD
  • B2B
  • AGRIBUSINESS

• FOUNDER AND GM OF STB
GERMANY - COUNTRY OVERVIEW

• 5TH LARGEST ECONOMY IN THE WORLD

• LARGEST ECONOMY IN EUROPE (GDP PER CAPITA $48,200 (2016 EST.)

• STABLE ECONOMIC GROWTH 1.7% (2016 EST.)

• POPULATION: 80,722,792 (JULY 2016 EST.)
  (GROWTH RATE: -0.16% (2016 EST.)

• SHRINKING POPULATION (LOW FERTILITY RATES)

• LARGE INCREASE IN NET IMMIGRATION →
  CHANGING CULTURAL AND FOOD TRADITION

• SMALL HOUSEHOLDS
Figure 5: Top-10 EU importers of fresh vegetables, 2014, in million tonnes

Source: Eurostat/ Comext
Figure created based on ICI Business
GERMANY – ABOUT THE FF&V MARKET

Top-10 EU importers of fresh fruit, 2014, in million tonnes

Source: Eurostat/Comext
Figure created by ICI Business
### Top-10 consumed vegetables in Germany in 2014 / Household

<table>
<thead>
<tr>
<th>Vegetable</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tomatos</td>
<td>30.2</td>
</tr>
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</tr>
<tr>
<td>others</td>
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</tr>
<tr>
<td>Champignons</td>
<td>5.47</td>
</tr>
<tr>
<td>Herbs</td>
<td>4.1</td>
</tr>
<tr>
<td>Eisberg Salad</td>
<td>3.64</td>
</tr>
</tbody>
</table>

**Household expenditure**

In 2014:

147.78 Euro

Per household

**AMI Market balance 2015**

GERMANY – ABOUT THE FF&V MARKET

Top-10 consumed fruits in Germany in 2014 / Household

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apples</td>
<td>27,84</td>
</tr>
<tr>
<td>Banana</td>
<td>20,37</td>
</tr>
<tr>
<td>Strawberries</td>
<td>14,47</td>
</tr>
<tr>
<td>Table Grapes</td>
<td>14,36</td>
</tr>
<tr>
<td>Orange</td>
<td>9,77</td>
</tr>
<tr>
<td>Easy Peelers</td>
<td>9,75</td>
</tr>
<tr>
<td>Pears</td>
<td>5,57</td>
</tr>
<tr>
<td>Melons</td>
<td>4,95</td>
</tr>
<tr>
<td>Peach</td>
<td>4,29</td>
</tr>
<tr>
<td>Sweet Cherries</td>
<td>4.10</td>
</tr>
</tbody>
</table>

Household expenditure
In 2014
153,58€ per household
GERMANY – ABOUT THE FF&V MARKET

• БОЛЕЕ 80% ОТ ПОДВЕРГАЕМЫХ ПОТРЕБЛЕНИЮ ВОРОК ИЗДЕЛИЙ В НЕМЕЦКОЙ РЕПУБЛИКЕ СОКРЫВАЮТСЯ В ЭКСПОРТНОМ КОМПОНЕНТЕ
• 2/3 ОТ ЗЕЛЕНИ ИЗДЕЛИЙ В НЕМЕЦКОЙ РЕПУБЛИКЕ СОКРЫВАЮТСЯ В ЭКСПОРТНОМ КОМПОНЕНТЕ
GERMANY – ABOUT THE FF&V MARKET

Importer/wholesaler segmentation of the fresh fruit and vegetable sector

- Hyper / Supermarket
- Specialised stores
- Street markets
- Food service
- Online concepts
GERMANY – ABOUT THE FF&V MARKET

HIGH CONCENTRATION IN GERMANY’S FOOD RETAILING

Company Shares of the Germany Food Retail Sector 2015

- EDEKA: 25%
- Schwarz-Group: 15%
- Aldi: 12%
- Rewe: 15%
- Metro: 5%
- Others: 14%

Source: Euromonitor

PRICE SENSITIVE MARKET
GERMANY – HOW TO REACH THE BUYERS?

B2B PLATFORMS

FRUIT ATTRACTION

BIOFACH

into organic
FFV Market Trends in Germany
Increase in local supply of fresh products

European import value of fresh fruit and vegetables, in billion euros

- Developing countries
- EU
- Rest of the world
GERMANY – MARKET TRENDS

GERMAN DIET AND CONSUMER PREFERENCES ARE CHANGING

- Milk, Butter, Cheese
- Potatoes
- Bread
- Meat
- Vegetables
- Fruits
- Citrusfruits
- Fish

Bar graph showing market trends in Germany from 1990 to 2013.

CBI Product Fact Sheets

ENPARD seminar - Ramallah
GERMANY – MARKET TRENDS

POPULARITY OF PURE AND ORGANIC CONTINUES

Retail sales of organic products in billions of euros

Source: organic-world

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MARKET SIZE
+ € 26 billion (2016)
→ Growth rate of 9% - hardly impacted by economic crisis!

<table>
<thead>
<tr>
<th>Share of EU organic market</th>
<th>Per capita consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany: 31%</td>
<td>Switzerland: € 177 per year</td>
</tr>
<tr>
<td>France: 17%</td>
<td>Denmark: € 162 per year</td>
</tr>
<tr>
<td>UK: 9%</td>
<td>Luxemburg: € 134 per year</td>
</tr>
</tbody>
</table>

Source: OrganicNetwork Data, IFOAM + FiBL.

ORGANIC CERTIFIED PRODUCTS
+ 3.7% of the German food market, in FFV even higher and with high growth potential!

ORGANIC PREMIUM
+ Up to 30% above market price
FAIRTRADE & CSR

EXPERIENCE IN THE FFV SECTOR

+ Sales to Germany 2015: 63,450 t
+ Fairtrade Premium: 2,170,000€

Other Fairtrade certifications: premiums are negotiated between buyers and suppliers
REQUIREMENTS, LEGISLATION & CERTIFICATIONS
Limited use of pesticides

- **Maximum residue levels (MRLs)**: Apply integrated pest management (IPM) to reduce the amount of pesticides (Global G.A.P.)

- **Control of food imported to the EU**
  
  Your products will be subjected to official control:
  
  a) Documentary checks
  b) Identity checks
  c) Physical checks

- **Marketing Standards + Labelling and packaging**
  
  - Cartons of fresh fruit or vegetables must mention the following particulars:
  - The name and the address of the packer and the dispatchers
  - The name of the produce (if the produce is not visible from the outside of the packaging)
  - The country of origin
  - The class and size (referring to the marketing standards)
  - Lot number for traceability
Plant Health & Contaminants

- The EU has laid down phytosanitary requirements to prevent introduction and spread of organisms harmful to plants and plant products in the EU.
### Example on MRLs – Egyptian Products on the German Red List

<table>
<thead>
<tr>
<th>Commodity</th>
<th>MRLs</th>
<th>Germany</th>
<th>Egypt</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spargelbohnen (Vigna unguiculata spp. sesquipedalis)</td>
<td>ex 0708 20 00; ex 0710 22 00</td>
<td>10</td>
<td>10</td>
<td>Dominikanische Republik (DO) Rückstände von Schädlingsbekämpfungsmitteln (cy) (cy)</td>
</tr>
<tr>
<td>Paprika (Capsicum spp.)</td>
<td>ex 0709 60 10; 0710 80 51</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Lebensmittel – frisches, gekühltes oder gefrorenes Gemüse)</td>
<td>ex 0709 60 99</td>
<td>20</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Erdbeeren (Lebensmittel – frisch oder gekühlt)</td>
<td>0810 10 00</td>
<td>10</td>
<td></td>
<td>Ägypten (EG) Rückstände von Schädlingsbekämpfungsmitteln (cy) (cy)</td>
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<tr>
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<td>20</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

www.agroberichtenbuitenland.nl
Requirements of the retailers / importing companies

Beside Quality & Price:

+ Traceability – also on retail packaging
+ No residue above maximum limits
+ Good network within European laboratories, official authorities etc.
+ Audits: eventually required
+ Good documentation (esp. when problems occur), spray records, inspection reposts, analytic, report of the producer, etc
+ Social compliance → Corporate Social Responsibility (CSR)
Certification as the guarantee
GLOBALGAP PRODUCER/ SUPPLIER MEMBERS

Zusammenarbeit mit Händlern

GLOBALGAP
STANDARDS / REQUIREMENTS - SUMMARY

1. Fair Trade
2. Organic
3. Quality Standards
4. Food Safety Management Systems
5. Global G.A.P.
6. Labelling
   - Marketing Standards
   - Contaminants
   - Pesticides
   - Food Control
   - Plant Health

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PRODUCT SPECIFIC INFO – FRESH TOMATOES

Top-10 consumed vegetables in Germany in 2014 / Household

<table>
<thead>
<tr>
<th>Vegetable</th>
<th>Percentage</th>
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</tbody>
</table>

www.ami-informiert.de
PRODUCT SPECIFIC INFO – FRESH TOMATOES

CONSUMPTION PER CAPITA

<table>
<thead>
<tr>
<th>Year</th>
<th>Consumption Per Capita</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005/06</td>
<td>22.4</td>
</tr>
<tr>
<td>2006/07</td>
<td>22.3</td>
</tr>
<tr>
<td>2007/08</td>
<td>23.09</td>
</tr>
<tr>
<td>2008/09</td>
<td>24.3</td>
</tr>
<tr>
<td>2009/10</td>
<td>24.5</td>
</tr>
<tr>
<td>2010/11</td>
<td>25.5</td>
</tr>
<tr>
<td>2011/12</td>
<td>25.2</td>
</tr>
<tr>
<td>2012/13</td>
<td>24.8</td>
</tr>
<tr>
<td>2013/14</td>
<td>24.1</td>
</tr>
<tr>
<td>2014/15</td>
<td>24.8</td>
</tr>
<tr>
<td>2015/16</td>
<td>26.2</td>
</tr>
</tbody>
</table>

Statista 2017

ENPARD seminar - Ramallah
PRODUCT SPECIFIC INFO – FRESH TOMATOES

Where do Consumers buy Tomatoes?

<table>
<thead>
<tr>
<th></th>
<th>Discount</th>
<th>Big Supermarket</th>
<th>Small Supermarket</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of Quantity</td>
<td>57,8</td>
<td>15,6</td>
<td>19,2</td>
<td>60,7</td>
</tr>
<tr>
<td>% of Quantity</td>
<td>7,1</td>
<td>6,9</td>
<td>25,3</td>
<td>7,4</td>
</tr>
</tbody>
</table>

Where do Consumers buy Tomatoes?

www.ami-informiert.de
What type of Tomatoes do consumers buy?

<table>
<thead>
<tr>
<th>Type of Tomato</th>
<th>Quantity Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>On the Vine</td>
<td>60%</td>
</tr>
<tr>
<td>Not on the Vine</td>
<td>40%</td>
</tr>
<tr>
<td>Cocktail Cherry</td>
<td>10%</td>
</tr>
</tbody>
</table>

www.ami-informiert.de
PRODUCT SPECIFIC INFO – FRESH TOMATOES

Season of Tomato Demand of private Households (2010)

% of Quantity

Germany  
Italy  
Spain

www.ami-informiert.de
Origin of Tomatoes bought in Germany
(Quantity in %, Jan-Aug)

<table>
<thead>
<tr>
<th>Year</th>
<th>Imports</th>
<th>Domestic</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>11</td>
<td>89</td>
</tr>
<tr>
<td>2004</td>
<td>11</td>
<td>89</td>
</tr>
<tr>
<td>2005</td>
<td>10</td>
<td>90</td>
</tr>
<tr>
<td>2006</td>
<td>11</td>
<td>89</td>
</tr>
<tr>
<td>2007</td>
<td>12</td>
<td>88</td>
</tr>
<tr>
<td>2008</td>
<td>12</td>
<td>88</td>
</tr>
<tr>
<td>2009</td>
<td>13</td>
<td>87</td>
</tr>
<tr>
<td>2010</td>
<td>14</td>
<td>86</td>
</tr>
<tr>
<td>2011</td>
<td>17</td>
<td>83</td>
</tr>
<tr>
<td>2012</td>
<td>16</td>
<td>84</td>
</tr>
</tbody>
</table>
# PRODUCT SPECIFIC INFO – FRESH TOMATOES

## TOP IMPORTERS OF FRESH TOMATOES IN THE WORLD

<table>
<thead>
<tr>
<th>Top Importers of Fresh Tomatoes</th>
<th>World Rank (2013)</th>
<th>Imported Quantities in Mt’000 (2013)</th>
<th>Top Import Sources (2013)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>First</td>
</tr>
<tr>
<td>USA</td>
<td>1</td>
<td>1,537</td>
<td>Mexico</td>
</tr>
<tr>
<td>Russia</td>
<td>2</td>
<td>852.5</td>
<td>Turkey</td>
</tr>
<tr>
<td>Germany</td>
<td>3</td>
<td>739.4</td>
<td>Netherlands</td>
</tr>
<tr>
<td>France</td>
<td>4</td>
<td>558.4</td>
<td>Morocco</td>
</tr>
</tbody>
</table>

- **First**
  - USA
  - Russia
  - Germany
  - France

- **Second**
  - Mexico
  - China
  - Spain

- **Third**
  - Canada
  - Netherlands
  - Belgium

- **Fourth**
  - Guatemala
  - Morocco
  - Italy & France

- **Fifth**
  - Dominican Republic
  - Spain
  - Tunisia, France & Italy

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www.iol.org
**PRODUCT SPECIFIC INFO – FRESH HERBS**

<table>
<thead>
<tr>
<th>Basil</th>
<th>Mint</th>
<th>Rosemary</th>
<th>Oregano</th>
<th>Chives</th>
<th>Parsley</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Ocimum basilicum</em></td>
<td><em>Mentha spp</em></td>
<td><em>Rosmarinus officinalis</em></td>
<td><em>Origanum vulgare</em></td>
<td><em>Allium schoenoprasum</em></td>
<td></td>
</tr>
</tbody>
</table>

Source: [Gourmetgarden.com](http://Gourmetgarden.com)  
Source: [Wondercloud.co.uk](http://Wondercloud.co.uk)  
Source: [Organicfacts.net](http://Organicfacts.net)  
Source: [Viragorporation.com](http://Viragorporation.com)  
Source: ENPARD seminar - Ramallah
PRODUCT SPECIFIC INFO – FRESH HERBS

- 2/3 OF CONSUMED HERBS ARE IMPORTED
- AVERAGE YEARLY GROWTH IN CONSUMPTION IS ABOUT 13%
- IN GENERAL A GROWING MARKET (FOR BOTH FRESH & DRIED)

CONSUMPTION:
- PARSLEY → 28%
- BASIL → 22%
- CHIVES → 13%
- DILL → 9%
- ROCKETS → 5%

PRODUCT SPECIFIC INFO – FRESH HERBS

MAIN SUPPLIERS TO GERMANY:

- ITALY
- FRANCE
- SPAIN
- NETHERLANDS

- MOROCCO
- TUNISIA
- EGYPT
- TURKEY
- ISRAEL
- KENYA
- ETHIOPIA

PRODUCT SPECIFIC INFO – FRESH HERBS

WINDOW OF OPPORTUNITY

WINTER SEPTEMBER – APRIL WHEN TEMPERATURE DROPS IN EUROPE

HERB PRICES ARE VERY STABLE COMPARED TO OTHER FRUIT AND VEGETABLES

https://www.bing.com/images/search?view=detailV2&ccid=Qj6s2iwY&id=61BC8DC5D618DE3C5CF5EB086778AF07AF47491A&thid=OIP.Qj6s2iwYBynZRXd7gMiv_gEsDh&q=frische+kraeuter+deutschland&simid=608036052075742337&selectedIndex=53&ajaxhist=0
**PRODUCT SPECIFIC INFO – FRESH HERBS**

**WINDOW OF OPPORTUNITY**

**WINTER SEPTEMBER – APRIL**

**HERB PRICES ARE VERY STABLE COMPARED TO OTHER FRUIT AND VEGETABLES**

---

**INDICATIVE END MARKET PRICES FOR FRESH HERBS IN GERMANY, IN € PER 100 GRAM**

<table>
<thead>
<tr>
<th></th>
<th>High end (organic supermarkets, dennree, Alnatura, Bio Company)</th>
<th>Middle range (Supermarkets Edeka, Rewe, Kaufland)</th>
<th>Low end (Discounters Aldi, Lidl, Netto, Penny)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basil</td>
<td>over € 10.75</td>
<td>€ 6.60 – 10.75</td>
<td>under € 6.00</td>
</tr>
<tr>
<td>Mint</td>
<td>over € 7.00</td>
<td>€ 6.60</td>
<td>under € 6.00</td>
</tr>
<tr>
<td>Rosemary</td>
<td>over € 7.00</td>
<td>€ 5.00 – 6.60</td>
<td>under € 5.00</td>
</tr>
<tr>
<td>Oregano</td>
<td>over € 7.00</td>
<td>€ 6.60</td>
<td>under € 6.00</td>
</tr>
<tr>
<td>Chives</td>
<td>over € 4.00</td>
<td>€ 3.30 – 3.96</td>
<td>under € 3.00</td>
</tr>
</tbody>
</table>

*IPD product factsheet - 2016*

*https://www.bing.com/images/search?view=detailV2&ccid=Qj6s2iwY&id=61BC8DC5D618DE3C5CF5EB086778AF07AF47491A&thid=OIP.Qj6s2iwYBynZRXd7gMiv_gEsDh&q=frische+kräuter+deutschland*
### Trends in German imports of fresh vegetables (2004-2013)

**Change in % p.a. (lin. Trend)**

<table>
<thead>
<tr>
<th>Vegetable</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courgette</td>
<td>5.3%</td>
</tr>
<tr>
<td>Carrots</td>
<td>2.8%</td>
</tr>
<tr>
<td><strong>Pepper</strong></td>
<td><strong>2.5%</strong></td>
</tr>
<tr>
<td>Other Veg.</td>
<td>1.6%</td>
</tr>
<tr>
<td>Cucumbers</td>
<td>1.3%</td>
</tr>
<tr>
<td>Vetables fresh</td>
<td>1.1%</td>
</tr>
<tr>
<td>Tomatoes</td>
<td>0.6%</td>
</tr>
<tr>
<td>Leafy Salads</td>
<td>0.3%</td>
</tr>
<tr>
<td>Onions</td>
<td>-1.3%</td>
</tr>
<tr>
<td>Cauliflower</td>
<td>-2.6%</td>
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</tbody>
</table>
## TOP EXPORTING COUNTRIES TO GERMANY

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<tbody>
<tr>
<td>Pepper</td>
<td>Italy</td>
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<td>Spain</td>
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<td>Holland</td>
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http://www.lebensmittlexikon.de/

https://www.thealthbenefitsof.com/the-health-benefits-of-paprika/
European import of chilli peppers, in 1,000 tonnes
2011-2015

ENPARD seminar - Ramallah

www.cbi.eu
PRODUCT SPECIFIC INFO – CHILLI PEPPER (CAPSICUM)

Main European importers of chilli peppers from non-European countries, in 1,000 tonnes
2011–2015

[Graph showing import data for France, United Kingdom, Spain, Germany, and Netherlands from 2011 to 2015]

https://en.wikipedia.org/wiki/Capsicum

www.cbi.eu

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PRODUCT SPECIFIC INFO – CHILLI PEPPER (CAPSICUM)

EXAMPLE OF AIR-FREIGHT PRODUCTS ALONG THE YEAR

https://en.wikipedia.org/wiki/Capsicum

www.verbraucher.de

11.07.2017

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PRODUCT SPECIFIC INFO – CHILLI PEPPER (CAPSICUM)

MAIN EXPORTING COUNTRIES:

- THAILAND (53%)
- INDIA
- KENIA
- EGYPT
- ETHIOPIA

https://en.wikipedia.org/wiki/Capsicum
OTHER PRODUCTS WITH POTENTIAL

Avocado boomt
IMPORTED AVOCADO TO GERMANY

# OTHER FRUITS WITH POTENTIAL – FROM PALESTINE

<table>
<thead>
<tr>
<th>Product</th>
<th>Jan</th>
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[https://www.lebensmittellexikon.de/](https://www.lebensmittellexikon.de/)
### OTHER VEGETABLES WITH POTENTIAL – FROM PALESTINE

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https://www.lebensmittellexikon.de/
COMMON CHALLENGES

Source: http://https://smalltalkbigresults.wordpress.com/tag/face-to-face-communication/
+ Website, Email, Business Cards, Flyers...

+ English Language

+ Cultural Awareness

http://journal.frontiersin.org/journal/communication
https://www.dreamstime.com/royalty-free-stock-photos-reliability-going-up-little-d-man-pushing-up-blue-arrow-reliability-white-background-image29889278
+ No need for unrealistic promises

+ Stick to the deadlines

+ Be honest (honest statements about limited sources is a good sign)

+ Invest in your reputation (slower but for the long run)
+ Cultural sensitivity is a plus

+ “WE CAN’T” is ok

+ No exaggerations

+ Punctuality is a global business norm

+ Mr. or Ms. + Family Name

Vertical Investment is worth it....

Source: http://thefarmingnews.com/future-urban-farming-takes-root
CREATIVE NEW MIXED OFFERS

http://www.waitrose.com/shop/ProductView-10317--43544-Baby+Vegetable+medley

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11.07.2017
ECO PACKAGING

https://www.pinterest.com/pin/563020390898497561/

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www.pinterest.de/pin/170292429637246329/
MAKE USE OF THE STORY BEHIND THE PRODUCTS - CSR

http://www.middleeasteye.net/in-depth/features/gazan-strawberry-farmers-tend-crops-despite-siege-782946965

http://www.ecomena.org/sustainable-agriculture-jordan-valley/
MAKE USE OF EU SUPPORTING PROGRAMMES
KNOW YOUR MARKET, BETTER!!

KNOW YOUR MARKET, BETTER!!
KNOW YOUR MARKET, BETTER!!

- www.importpromotiondesk.de
- https://www.cbi.eu/
- ......
INVEST IN MARKETING
Marketing materials should be

- Simple
- Not too much colors
- Right to the point
- Company
- (CSR)
- Calendar
- Certifications
- Pictures
- Farm Location if any

INVEST IN MARKETING

Marketing Personnel
THANK YOU FOR YOUR ATTENTION!!

Husam Al Dakak
info@stbridgers.com
+49 17671753778