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**&**



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SULTANATE OF OMAN**

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**PRE-FEASIBILITY REPORT (DRAFT)**

**FOR**

**SETTING UP A DATES PROCESSING AND PACKAGING  
MANUFACTURING UNIT IN OMAN**

**CONTENTS**

<b>1</b>	<b>INTRODUCTION .....</b>	<b>1</b>
1.1	PROJECT BRIEF .....	1
1.2	PROJECT RATIONALE .....	2
<b>2</b>	<b>INDUSTRY ANALYSIS .....</b>	<b>3</b>
2.1	MACROECONOMIC CONDITIONS.....	3
2.2	TREND IN ECONOMIC DIVERSIFICATION .....	4
2.3	PROCESSED DATES - VALUE CHAIN ANALYSIS .....	5
2.4	VALUE CHAIN ACTIVITIES IN GCC.....	5
2.5	VALUE CHAIN IN OMAN .....	5
2.6	MISSING VALUE CHAIN ACTIVITIES IN OMAN.....	6
<b>3</b>	<b>MARKET ANALYSIS .....</b>	<b>7</b>
3.1	PRODUCT DESCRIPTION.....	7
3.2	USES OF DATES .....	9
3.3	GLOBAL DATES INDUSTRY.....	10
3.5	GLOBAL TRADE .....	11
3.5.1	<i>Major Global Exporters.....</i>	11
3.5.2	<i>Major Global Importers.....</i>	11
3.6	GCC OVERVIEW .....	12
3.7	DATES SECTOR IN OMAN.....	13
3.8	DEMAND ANALYSIS – PACKAGED DATES .....	15
3.8.1	<i>Domestic Production of Dates.....</i>	15
3.8.2	<i>Estimated current demand / Consumption .....</i>	16
3.9	DEMAND ANALYSIS – DATES SYRUP .....	16
3.9.1	<i>Consumption of Dates Syrup in Oman .....</i>	16
3.9.2	<i>Local Production in Oman .....</i>	17
3.9.3	<i>Import &amp; Export Quantity.....</i>	17
3.9.4	<i>Estimated Consumption in Oman .....</i>	18
3.10	DEMAND PROJECTION .....	18
3.10.1	<i>Processed &amp; Packaged Dates.....</i>	18
3.10.2	<i>Dates Syrup .....</i>	19
3.11	STRUCTURE OF THE COMPETITION .....	20
3.11.1	<i>Major players &amp; their Production Capacities - Packaged Dates.....</i>	20
3.11.2	<i>Marketing Mix Strategy of Competition .....</i>	21
3.12	NEW PROJECTS IN OMAN .....	28
3.13	PROPOSED MARKET MIX STRATEGY FOR THE PROJECT.....	29
3.13.1	<i>Target market .....</i>	29
3.13.2	<i>Product .....</i>	29
3.13.3	<i>Pricing.....</i>	32
3.13.4	<i>Promotion .....</i>	33
3.13.5	<i>Distribution .....</i>	33
3.14	PROJECTED MARKET SHARE/ SALES VOLUMES .....	34
3.14.1	<i>Packaged Dates .....</i>	34
3.14.2	<i>Date Syrup.....</i>	35
3.15	PRODUCTION CONSIDERED FOR FINANCIAL ANALYSIS .....	35
<b>4</b>	<b>TECHNICAL ANALYSIS.....</b>	<b>36</b>
4.1	LOCATION AND LAND.....	36
4.2	DATES MANUFACTURING PROCESS .....	36
4.3	DATES SYRUP MANUFACTURING PROCESS.....	37

4.4	PLANT AND MACHINERY.....	38
4.5	MACHINERY SUPPLIERS - ILLUSTRATIVE LIST.....	38
4.6	PROCESSING CAPACITY.....	39
4.7	BUILDING AREA.....	39
4.8	UTILITIES.....	40
4.8.1	Power.....	40
4.8.2	Water.....	40
4.9	MANPOWER.....	40
4.10	PROJECT IMPLEMENTATION SCHEDULE.....	41
<b>5</b>	<b>FINANCIAL ANALYSIS.....</b>	<b>42</b>
5.1	COST OF PROJECT.....	42
5.1.1	Land.....	42
5.1.2	Building and Civil Works.....	43
5.1.3	Plant and Machinery.....	44
5.1.4	Vehicle.....	44
5.1.5	Furniture.....	44
5.1.6	Pre-operative Expenses.....	44
5.1.7	Contingencies.....	44
5.1.8	Working Capital.....	45
5.2	MEANS OF FINANCE.....	45
5.3	COST OF SALES.....	46
5.3.1	LAND.....	47
5.3.2	UTILITIES.....	47
5.3.3	SALARIES & WAGES.....	47
5.3.4	ADMINISTRATIVE EXPENSES.....	47
5.3.5	DEPRECIATION & AMORTIZATION.....	48
5.3.6	LOAN AND INTEREST CALCULATIONS.....	48
5.3.7	COST RATIOS.....	48
5.4	PROFIT AND PROFITABILITY ANALYSIS.....	49
5.5	KEY APPRAISAL CRITERIA.....	50
5.6	SENSITIVITY ANALYSIS.....	50
<b>6</b>	<b>KEY SUCCESS AND PUSHBACK FACTORS.....</b>	<b>51</b>
6.1	KEY SUCCESS FACTOR.....	51
6.2	KEY PUSHBACK FACTORS.....	51
<b>7</b>	<b>CONCLUSION.....</b>	<b>52</b>

Annexures – Financial Projections

# 1 INTRODUCTION

## 1.1 PROJECT BRIEF

This report relates to a study on the feasibility of setting up a dates processing and packaging plant in the Sultanate of Oman. Following is the Brief illustration of the project:

<b>Name of Product</b>	<b>Packaged Dates &amp; Date Syrup</b>	
Domestic Market Potential (as of 2019)	40,384 tons - Packaged Dates, 1,128 tons - Date Syrup	
Export Potential (as of 2019)	Not considered	
Capacity of the Project	Packaged Dates - 4000 Tons Value Added Products - 1222 Tons Date Syrup - 150 tons	
Total Investment	2.107 million	
Equity Investment	695,000	
<b>Key Appraisal Criteria:</b>		
IRR on total investment	17.2%	
IRR on Equity	25.3%	
Payback period of Total Investment	6 years 3 months	
Payback period on equity	5 years 8 months	
Break Even Point (as % of Capacity)	22.7%	
Cash Break Even Point (as % of Capacity)	19.5%	
Debt Equity Ratio	1.5:1	
DSCR	2.279	
Manpower	Total	79
	Nationals	28

## 1.2 PROJECT RATIONALE

About 369,000 tons of Dates is produced in Oman annually of which 53% is deemed edible and fit for human consumption (processed or unprocessed).

As per market survey by the consultants, the local consumption or demand for *branded processed and packaged Dates* is about 18% to 20% of the edible Dates produced.

For 2020, the demand is estimated at about 41,000 tons (including imports). The demand is projected to increase to about 47,000 tons by the year 2025. The proposed project aims to get a share of this market.

The plant is planned to be established near to the source of the raw material in Samayl Industrial City in Oman.

## 2 INDUSTRY ANALYSIS

### 2.1 MACROECONOMIC CONDITIONS

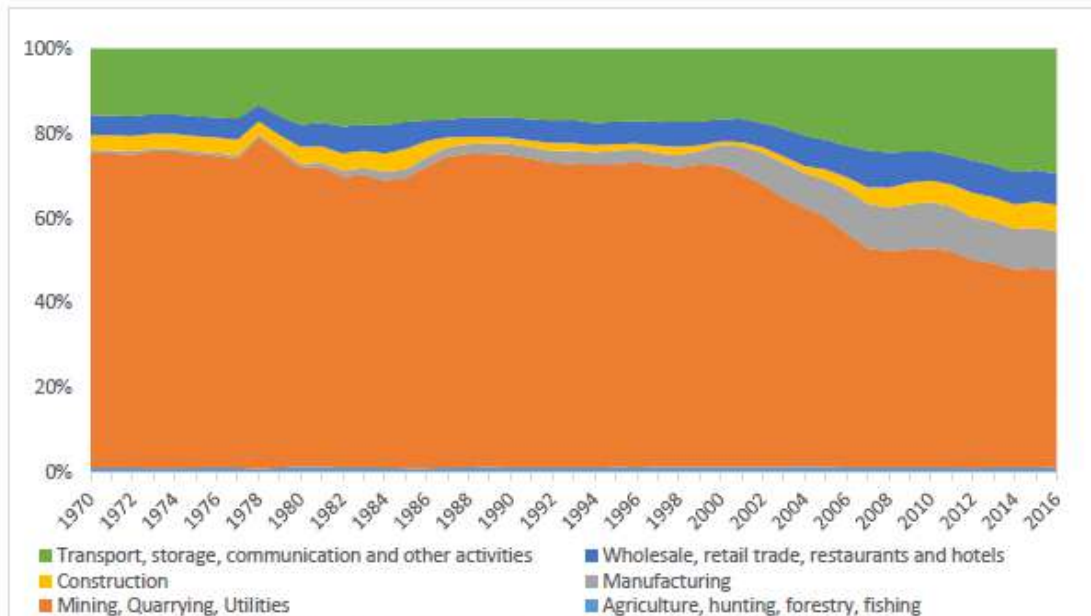
The recently published statistical bulletin from National Centre for Statistics and Information (NCSI) indicates that the GDP at market prices reduced by 15% during Year 2020 when compared to the Year 2019. This is mainly due to the dual impact of slump in oil prices and the COVID - 19 pandemic. As per the World Bank outlook a revival is expected in 2021 and in 2022 on an average of around 4%. The estimated GDP of Oman considering the past trend, current situation and the expected recovery is illustrated below:



Our average price of Oil for 2020 is USD 46/Barrel. We expect this to go up to USD 50/barrel in 2021 and USD 60/barrel in 2022.

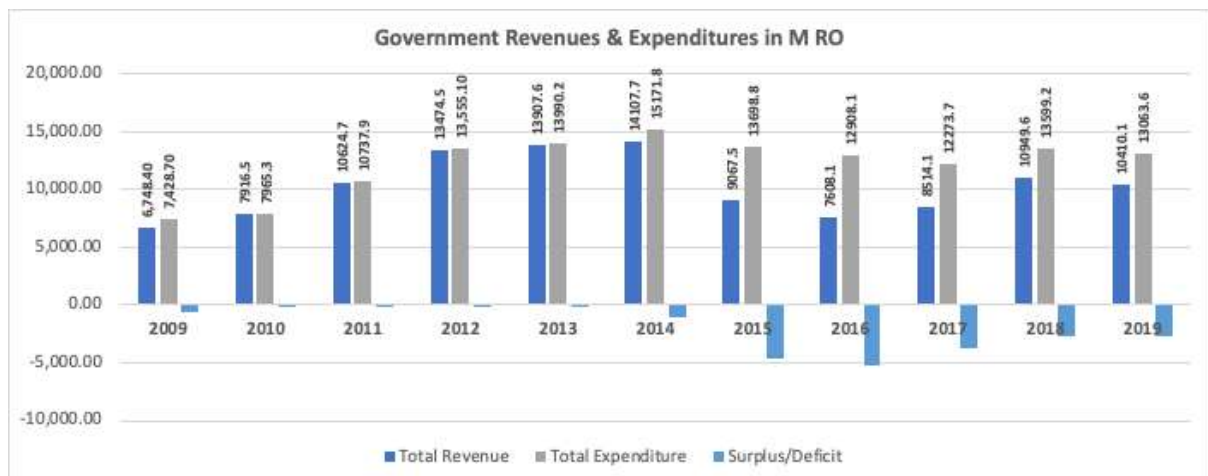
## 2.2 TREND IN ECONOMIC DIVERSIFICATION

Since the beginning of the millennium our economic activity has significantly moved away from oil as indicated below. The following graph gives data up to 2016. In 2019 Crude Petroleum contributed to 29.11% of GDP.

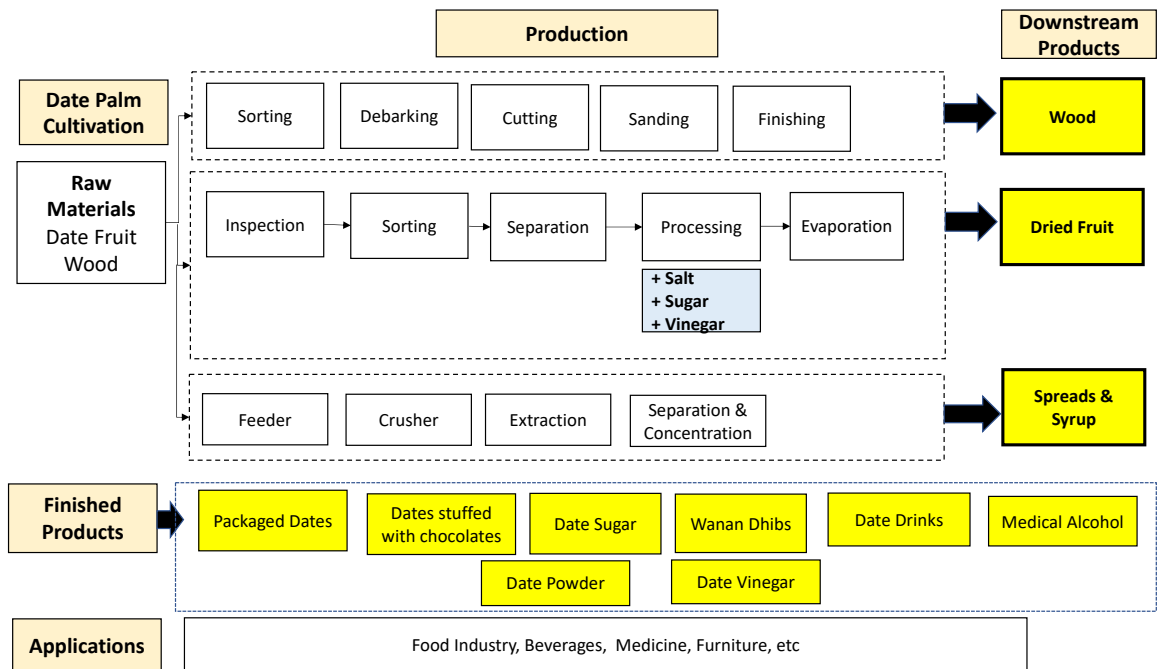


Source: UNIDO elaboration based on UN Statistics Division (2018)

However the Government income is still substantially dependent on Oil sector. The tightening of spending, introduction of VAT and increased revenues from Gas are expected to contain deficits to manageable levels by 2022.



## 2.3 PROCESSED DATES - VALUE CHAIN ANALYSIS



## 2.4 VALUE CHAIN ACTIVITIES IN GCC

The value chain activities in GCC countries especially Saudi Arabia and UAE have a relatively matured Dates processing industry including branded value added products. Saudi Arabia manufactures Vinegar from Dates that are not fit for human consumption. However, potential to manufacture products like Industrial alcohol is missing in GCC countries.

## 2.5 VALUE CHAIN IN OMAN

Dates packaging and processing industry is well represented in Oman. There are over 30 Dates processors / re-packers in Oman. Products manufactured by the key players include loose dates, packaged dates, date paste, date syrups and dates chocolates. The details of the products manufactured and the major players manufacturing them are provided in the Competition Analysis chapter of this report.



## **2.6 MISSING VALUE CHAIN ACTIVITIES IN OMAN**

While the activities related to farming, drying and sale of products like dried dates and syrup are fairly developed in Oman, there is very limited activities with respect to producing value added branded products including chocolates, stuffed dates etc.

In addition, there is no facility for processing of the Dates that are not fit for human consumption which can be used to manufacture products like industrial alcohol, vinegar etc.

### 3 MARKET ANALYSIS

The following sections of the report discuss in detail the various aspects edible dates.

#### 3.1 PRODUCT DESCRIPTION

In Oman, Dates are the collective sweet pride of the entire nation. For Omani or Muslim people, they represent an ineffable, multi-dimensional continuity to the past and future. Dates are consumed in many forms:

- Dry or soft Dates are eaten out-of-hand, or may be seeded and stuffed with fillings such as almonds, candied orange, lemon peel, marzipan, etc.
- Dates can also be chopped and used as a special ingredient in the manufacture of food products like bread, cakes, dessert items etc.
- Dates are also processed into cubes, paste, spread, Dates syrup or "honey", powder (Dates sugar)
- It is given as a gift during a get together or festivals
- It is offered to guests along with Omani coffee (kahwa) as a custom in Oman

Dates fruits have a very high nutritional value as one kg of Dates possesses around 3,000 calories.

- It consists of 70% carbohydrates (mostly sugars), making it one of the most nourishing natural foods available to man.
- It also contains proteins, fats, crude fibres, vitamins, mineral, enzymes and other useful substances.
- The water content is between 15 to 30% depending on the variety and on the maturity stage of the fruit.

Due to genetic difference and growth conditions, Dates show a wide variety in their final shape and appearance more than any other fruit. Therefore, the quality profile of Dates involves a range of colour, shape, size, texture and pit to flash ration. The other important determinists are weight, moisture contents, sugar and the fibre.

<b>Major constituents of Dates Fruit</b>	
<i>Dates contain the following food values, calculated per 100 grams</i>	
Moisture Contents	15 -30 %
Protein	2.5 %
Fat	0.4%
Minerals	2.1%
Carbohydrates	70.0%
Fiber	3.9 %
<i>Vitamins A, B Complex &amp; K are also found in Dates</i>	
<i>One Kg (1000 grams) Dates contain, on an average, 3000 calories. Whereas average human body requirement is between 2500 to 3000 calories a day</i>	

*(Source: Secondary survey by ABC)*

Having characteristics of low fats, appropriate moisture contents, carbohydrates and other nutritional values with a sweet and supple taste & texture along with a chewing pleasure, Dates are considered as complete food and are cherished all around the world. The following nutritional data outlines some of the key nutrients found in dates, and is based on a 100g serving of the fruit.

<b>Contents</b>	<b>Quantity &amp; % of Recommended Dietary Allowance</b>
Fibber	6.7 grams. 27% RDA
Potassium	696 milligrams. 20% RDA.
Copper	0.4 milligrams. 18% RDA.
Manganese	0.3 milligrams. 15% RDA
Magnesium	54 milligrams. 14% RDA
Vitamin B6	0.2 milligrams. 12% RDA

*(Source: Secondary survey by ABC)*

Dates syrup is rich in the glucose and fructose, and so most of its sugar content is absorbed into the bloodstream in the mouth, meaning that it raises the blood glucose levels more efficiently and immediately than other syrups.

### 3.2 USES OF DATES

Dates have defined the legendary Arab hospitality for centuries. As per medical studies, just 15 pieces of Dates are enough for a person to meet their recommended daily dose of vitamins, minerals and other essentials. As per medical researchers, Dates have also been found to protect from neurodegenerative diseases such as Alzheimer's.

Following are some health benefits of Dates:

- Weight loss
- Promoting heart health, reducing heart disease risk
- Iron-deficiency anemia
- Impotence
- Pregnancy deliveries
- Chronic conditions such as arthritis
- Preventing colon cancer
- Relieving constipation, supporting regular bowel movements
- Controlling Diarrhea
- Reducing blood pressure
- Promoting respiratory and digestive health
- Hemorrhoid prevention
- Reducing colitis risk

In addition to valuable food and pharmaceutical related ingredients and derivatives produced from Dates, there is a potential for the production of animal fodder and timber from the Dates palm crop. There is also potential for manufacturing derivatives, such as vinegar, medical alcohol, and so on, from Dates.

The Dates syrup is great source of vitamins and minerals. It has lots of iron, potassium, copper, manganese, magnesium and is a healthier compensation of sugar. You can use Dates syrup with deserts (perfect for raw cakes) and it goes great with plain yoghurt, fresh cheese, vanilla ice-cream and smoothies.

### 3.3 GLOBAL DATES INDUSTRY

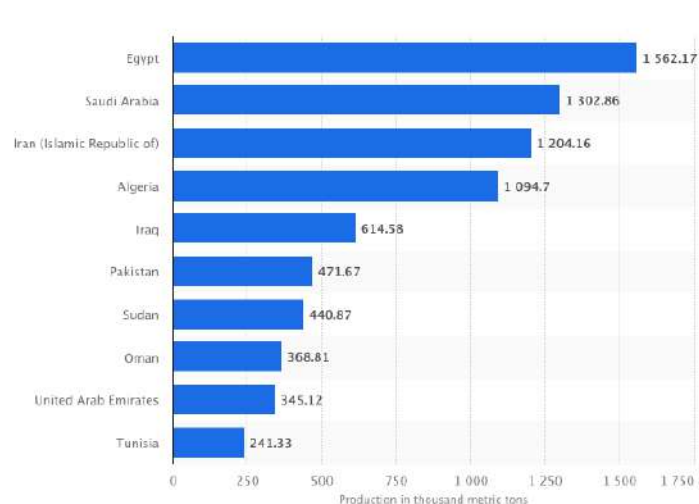
Date Palm is the most important crop in many parts of the world that are usually characterized by arid and high-temperature climate. Date fruit has a special significance in Islamic countries. Rich in fibres, minerals, and vitamins, dates are traditionally served at iftar tables to break the fast during the holy month of Ramadan. Following are some of the key aspects of Global trade of Dates:

- Africa holds a majority of share 70% of global consumption for dates.
- North America happens to be the fastest-growing market.
- Saudi Arabia is the world's biggest exporter of dates in terms of quantity. Iraq, Iran, the United Arab Emirates, and Tunisia are other major exporters of dates.
- Date commodity trade has been rising in recent years, owing to increasing demand from all the five continents of the world.

According to a report by Mordor Intelligence, the global consumption of dates is forecasted to grow at a CAGR of 4.5% over the forecast period of 2020-2025.

- The establishment of fair trade forums and increasing demand for organic dates are few factors enhancing the market.

The chart illustrates the production in kilo tons of the leading Producers of Dates in the World.



### 3.5 GLOBAL TRADE

Dates is traded under the HS Code : 080410 – Fresh or Dried Dates. The import / export data of Dates for 2016 to 2020 is given in the following sections.

#### 3.5.1 Major Global Exporters

Exporters	2016	2017	2018	2019	2020		
	Exported quantity, Tons				Exported quantity, Tons	Exported Value, USD'000	Exported Unit Value USD/Ton
Saudi Arabia	116,993	139,272	161,996	182,317	213,411	245,969	2,553
Iran	209,461	253,516	306,291	188,660	189,373	139,404	736
Iraq	322,531	253,804	265,342	686,926	176,339	78,800	447
United Arab Emirates	275,863	217,982	200,887	212,831	163,832	150,038	916
Tunisia	113,794	104,357	124,019	113,887	117,080	298,903	2,553
Pakistan	163,177	175,130	136,482	95,305	116,074	60,264	519
Algeria	31,109	46,617	91,694	120,388	67,483	129,190	1,914
Israel	66,965	NA	NA	NA	62,689	235,746	3,761
USA	8,503	8,868	10,013	14,792	18,923	89,508	4,730
France	13,031	13,248	12,603	15,697	18,163	48,605	2,676
South Africa	2,028	2,327	2,848	2,302	17,793	47,463	2,668
Turkey	5,233	4,015	5,724	8,524	12,291	22,272	1,812
Germany	5,981	6,225	7,276	10,754	10,542	39,515	3,748
Oman	15,421	11,767	13,009	13,169	10,438	12,936	1,239

Source: UN COM Trade

#### 3.5.2 Major Global Importers

Importers	2016	2017	2018	2019	2020		
	Imported quantity				Imported quantity, Tons	Imported Value in USD'000	Imported Unit Value USD/Ton
United States	2,440,654	2,592,956	2,752,248	2,804,898	2,827,580	4,088,911	1,446
Netherlands	565,498	611,415	741,052	767,851	843,077	1,683,410	1,997
China	209,434	264,148	412,059	676,414	631,039	1,007,635	1,597
France	369,135	387,647	429,329	441,136	431,277	958,557	2,223
Spain	287,095	322,772	373,254	381,385	408,755	674,291	1,650
Germany	340,257	346,757	398,882	380,186	394,804	857,224	2,171
India	359,021	386,898	425,245	295,211	381,386	362,357	950
UK	356,289	388,462	392,555	385,816	361,262	720,525	1,994
Canada	268,901	291,360	306,489	304,553	317,693	530,980	1,671
Japan	225,669	227,427	243,835	240,992	247,146	399,118	1,615

Source: UN COM Trade

### 3.6 GCC OVERVIEW

The Middle East date fruit market is anticipated to reach US\$ 9.1 billion by 2025, displaying reasonable CAGR of 2.73% over the forecast period (2019-2025), according to a report published by UnivDatos - Middle East Market Insights on Dates Fruits (2019-2025)

Date Production in Middle East Region 2012-2017 (in tonnes)



Source: UnivDatos - Middle East Market Insights on Dates Fruits (2019-2025)

Some of the major players operating in the Middle East Dates fruit market are:

Name of Player	Country
Al Foam	UAE
Al Barak Dates Factory	UAE
Hadiklaim Dates Grower Cooperative	Jordan
Maghadi Dates	Saudi Arabia
Haifa Dates	Tunisia
Kingdom Dates	Saudi Arabia
Sharjah Dates	UAE
Sahara Dates	Ajman, UAE
Emirates Dates	Abu Dhabi, UAE
Al Mohamadia Dates Company.	Saudi Arabia

With an objective to enhance their product portfolio, these players have adopted various strategies to increase the production of date fruit in their farms and factories to cater to the increasing customer demand for date fruits in different form.

### 3.7 DATES SECTOR IN OMAN

The Dates palm is considered the major fruit crop of Oman, and it plays a crucial role in the cultural identity of the Sultanate.

Dates in Oman can be categorised into table Dates (fit for human consumption in raw form) and manufacturing Dates. Table Dates palms number over five million, and they account for 64 per cent of the total Dates production in Oman. Khalas Al Dhahira, Abu Naranja, Khunaizi, Khasab and Fardh belong to this category.

Oman has about 200 Dates palm varieties and 30 types of these varieties are recognized as good varieties and have commercial and high market absorption demand. Top good varieties such as Khalas are about 8% of total production and second top varieties Dates such as Zabad, Khanizi, etc., are commercial Dates varieties and can be stored and sold at a reasonable price. Majhool Dates are new to Oman, but are very popular in international markets.

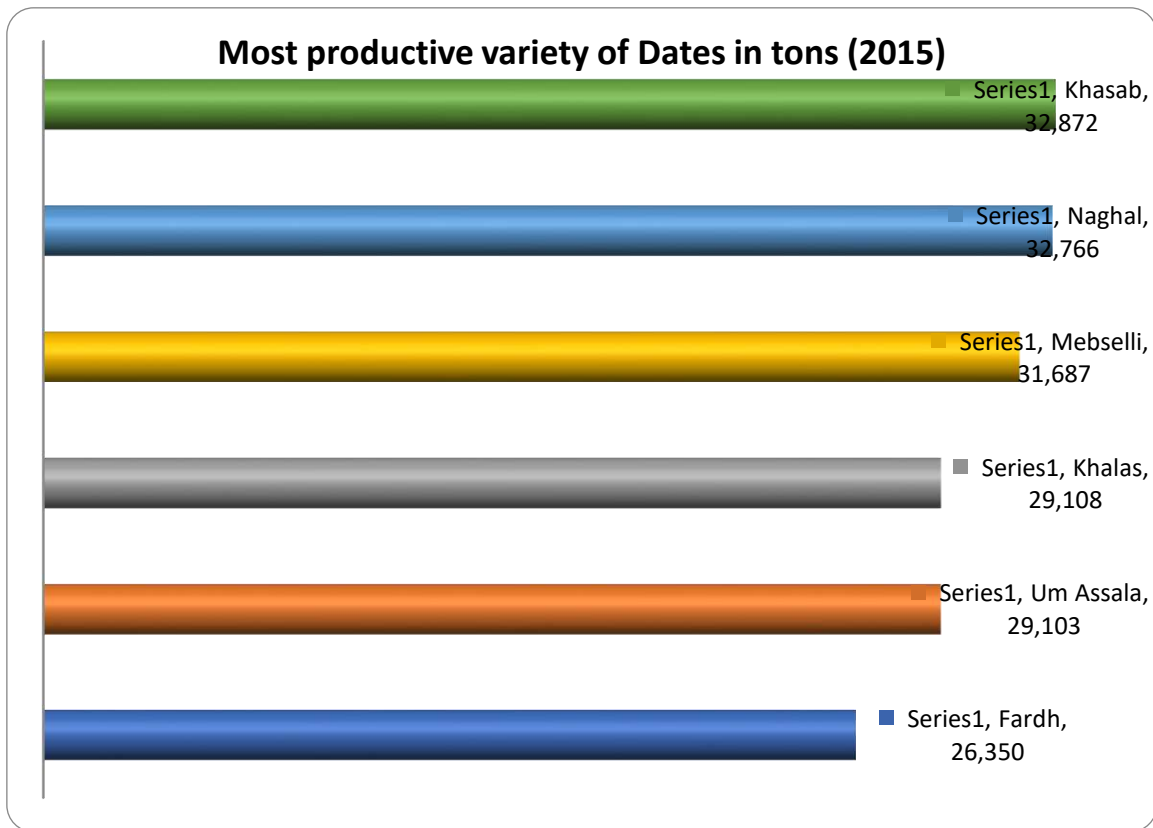
As the primary agricultural crop in Oman, Dates palms constitute nearly 80 per cent of the total fruit cultivated area and 50 per cent of the total agricultural area in the country. The number of palm trees in the Sultanate, according to the latest statistic published by the Ministry of Agriculture and Fisheries, reached 7.6 million palm trees in agricultural areas, in addition to 800,000 palm trees in home gardens, about 200,000 in streets and public parks and 600,000 palm trees within the project on one million palm trees. The Sultanate's production of dates reached 369,000 tons in 2018 placing Oman among the top 10 producers of dates globally. The human consumption in 2017 of dates reached 53% of local production as 6 % of the produced dates were processed and exported.



Majority of the Omani Dates are produced in Dakhiliyah, Al Batinah North and Al Batinah South governorates with their average annual production reaching 63,000-65,000 tons.

As per Ministry of Agriculture & Fisheries data, around 53 (%) of the total produce of Dates in Oman is fit for human consumption. This includes both branded and unbranded Dates. Traditional cultivation methods, and poor post-harvest management and marketing are the main issues for Dates palm production in Oman.

The following chart illustrates the major varieties of Dates consumed in the country (of the total 53% Dates produced in Oman).



*(Ministry of Agriculture & Fisheries Data - Oman 2015)*

### 3.8 DEMAND ANALYSIS – PACKAGED DATES

The market for Dates in Oman is met by local production as well as imports. Details are provided in the following sections.

#### 3.8.1 Domestic Production of Dates

The following table provides the trend in production of Dates from various regions of Oman

Governorates	2015	2016	2017	2018	2019
Muscat	10.6	12.8	13.0	13.2	13.4
Dhofar		4.0	4.0	4.0	4.0
Musandum	8.5	7.0	7.2	7.3	7.4
Al Buraimi	17	11.1	11.7	12.2	12.8
Al Dakhliyah	65.1	65.3	64.3	66.0	67.6
North Al Batinah	63.1	74.8	76.1	77.3	78.6
South Al Batinah	64	69.9	71.0	72.1	73.3
South Al Sharqyia	31.3	36.5	37.6	38.8	40.0
North Al Sharqyia	28.9	38.5	39.6	40.7	41.8
Al Dhahira	35.1	35.5	36.3	37.1	37.9
<b>TOTAL in ('000 tons)</b>	323.6	355.5	360.9	368.9	377.0
Total Dates fit for consumption	53%	53%	53%	53%	53%
<b>Total in (000 tons)</b>	171.5	188.4	191.3	195.5	199.8
<b>YOY Growth</b>	2%	10%	2%	2%	2%

(Source: Statistical year book Oman – 2020)

It may be noted that, out of the total production in 2020, only 200,000 tons is fit for human consumption. Further analysis indicates:

- There has been consistent increase in dates production.
- With the one million date palms project already under implementation, the output is expected to increase further.
- Increased production of dates shall pave way for investment opportunities to manufacture value added products

### 3.8.2 Estimated current demand / Consumption

In addition to local production, Dates is imported as well as exported / re-exported. The following table illustrates the trend in consumption based on the local production as well as foreign trade of dates.

Year	2014	2015	2016	2017	2018	2019	CAGR (2014 - 2019)
Local Production (fit for human consumption – 53% of total)	167,533	171,508	188,396	191,286	195,538	199,800	4%
Imports	10,613	12,805	10,556	10,999	17,423	23,881	18%
Exports	14,825	8,774	15,201	10,582	11,343	21,129	7%
Re-exports	325	368	498	1,184	1,664	630.7	14%
<b>Estimated Consumption*</b>	<b>169,656</b>	<b>181,994</b>	<b>183,253</b>	<b>190,519</b>	<b>199,954</b>	<b>201,922</b>	<b>4%</b>
YOY Growth		7.27%	0.69%	3.96%	4.95%	0.98%	

\*: Estimated Consumption = Production for Human consumption + Imports - Exports - Re-exports

(Source: Foreign Trade Statistics data from Oman ROP – 2019, NCSI Date 2019)

- The compounded annual growth rate (CAGR) during the years 2014 to 2019 is 4%.
- Exports have also grown at an impressive CAGR of 7% during 2014 to 2019.

## 3.9 DEMAND ANALYSIS – DATES SYRUP

### 3.9.1 Consumption of Dates Syrup in Oman

The demand for Dates syrup is based on import, exports and production of the product in Oman. In the absence of HS code for date syrup product the demand is considered from the production of dates syrup by local players in Oman and the foreign trade statistics data for the HS code 21069099 – (Food Preparations Not elsewhere stated).

As per secondary survey, countries like China and India use the above HS code (a percentage of it) for trade of Dates syrup product. The following table illustrates the imports and exports data for dates syrup in Oman.

### 3.9.2 Local Production in Oman

Though specific data regarding the manufacture of date syrup is not available in Oman, the following estimates have been made based on discussions with the experts in the industry.

Details	2014	2015	2016	2017	2018	2019
<b>Based on local production (In Tons)</b>						
Production	600	700	750	800	900	1000

*(Source: Primary survey by ABC)*

### 3.9.3 Import & Export Quantity

The total imports have doubled in the last 5 years and the exports have stopped completely for the last 3 years. 10% of the total imports are taken as imports of dates syrup in Oman and for exports 75% of the total exports are taken.

<b>HSC: 21069099 - Food Preparations Not elsewhere stated</b>						
Details	2014	2015	2016	2017	2018	2019
	<b>Tons</b>					
Total Import	6343	7092	6403	7864	9319	6230
Imports (Dates syrup-10% of total)	634	709	640	786	932	623
Total Export	43	365	232	305	1041	1088
Exports (Dates syrup-75% of total)	32	274	174	228	781	816

*(Source: Foreign Trade Statistics data from Oman ROP – 2019)*

- Total Imports for the year 2019 for dates syrup is considered to be about 623 tons.
- Total Exports for the year 2019 for dates syrup is considered to be about 816 tons

### 3.9.4 Estimated Consumption in Oman

The following table illustrates the estimated consumption of date syrup in Oman. However, as product specific data has been hard to get, the average of the estimated consumption is considered for further analysis.

Details	2014	2015	2016	2017	2018	2019
Production (in tons)	600	700	750	800	900	1000
Imports (in tons)	634	709	640	786	932	623
Exports (in tons)	32	274	174	228	781	816
<b>Total consumption (tons)</b>	<b>1,202</b>	<b>1,135</b>	<b>1,216</b>	<b>1,358</b>	<b>1,051</b>	<b>807</b>
<b>Average Consumption</b>	<b>1,128 tons</b>					

### 3.10 DEMAND PROJECTION

#### 3.10.1 Processed & Packaged Dates

The following table illustrates the projected demand for the different categories of industrially processed Dates. The consumption for the current year is expected to have skewed due to the pandemic. Hence the consumption for the year 2019 (illustrated in the earlier sections) has been considered as the basis for the future projection.

The following table(s) illustrate the expected demand for the various types of packaged dates and Date syrup considering the following growth rates:

- Packaged Plain dates (with seed / seedless) : 2%
- Stuffed dates : 4%
- Value added products including date chocolates : 4%

Segment	Base Demand	Growth (%)	Projected Demand					
			2021	2022	2023	2024	2025	2026
Packaged seed-less Dates	22,211	2%	22,656	23,109	23,571	24,042	24,523	25,014
Packaged Dates with seeds	4,038	2%	4,119	4,202	4,286	4,371	4,459	4,548
Dates (stuffed with nuts) with regular or standard packaging)	10,096	4%	10,500	10,920	11,357	11,811	12,283	12,775
Premium packaged Dates (stuffed with dry fruits, chocolate covered, etc. with focus on packaging)	4,038	4%	4,200	4,368	4,543	4,724	4,913	5,110
<b>Total</b>	<b>40,384</b>		<b>41,475</b>	<b>42,598</b>	<b>43,756</b>	<b>44,949</b>	<b>46,179</b>	<b>47,446</b>

### 3.10.2 Dates Syrup

Segment	Base Demand	Growth (%)	Projected Demand					
			2021	2022	2023	2024	2025	2026
Dates Syrup	<b>1,128</b>	2%	1,151	1,174	1,197	1,221	1,246	1,271

*(Considering a conservative 2% growth rate for the next 5 years)*

### 3.11 STRUCTURE OF THE COMPETITION

#### 3.11.1 Major players & their Production Capacities - Packaged Dates

There are over 30 Dates processors / re-packers in Oman. The following table illustrates the list of major players, their capacities and the product range:

<i>Factory name</i>	<i>Estimated Production capacity (tons)</i>	<i>Products Range</i>
Samail Dates Factory	6,000	Loose Dates, Dates Paste, Dates syrup
United Dates Company	4,500	Dates Paste, Dates syrup and Dates chocolates
Al Shams Al Bahiya	3,500	Loose Dates, Dates syrup
Nasa Trading Company	500	Loose Dates
Al Talaa National Dates	300	Loose Dates
Gulf Dates	100	Loose Dates
Adam Dates	100	Loose Dates
Saif Bin Khalifa Bin Muhsen Al Saiabi	75	Loose Dates
Huzaa Al Balushi Trading CO.	75	Loose Dates
Al Amri Dates	50	Loose Dates
Basateen Al Faraa Trading	50	Loose Dates
Others ( <i>including Happiness Ambassador LLC</i> )	5,000	Loose Dates

*(Source: Primary Survey by ABC)*

Based on primary survey, the total production or packaging capacity of local processors is estimated at 30,000 tons.

### 3.11.2 Marketing Mix Strategy of Competition

#### 3.11.2.1 Products

##### 3.11.2.1.1 Variants

Fardh, Khalas and Khunaizi, are considered as popular products and are used by the local manufacturers for processing. These are predominantly grown in the Dakhliyah region. Oman boasts more than 40 indigenous varieties of Dates. While Khunaizi Dates are the most sugary, the Ash Patash and Al Nagal varieties are not so sweet. The most delicious, arguably, are the Khalas variety.

Following table lists the popular Dates from different regions of GCC.

<i>Country</i>	<i>Dates used for processing &amp; packaging</i>
Sultanate of Oman	Fard, Khalas, Khenaizi, Al Nagal
United Arab Emirates	Lulu, Dabbas, Khenaizi
Saudi Arabia	Majdool, Khalas, Sagai, Sukkary, Sellaj

##### 3.11.2.1.2 Quality

The quality of Dates is measured by the sweetness, size and origin. Taste, succulence and packing (aesthetics) are considered as the major quality attributes. While sweetness and size depends on the variety of Dates, the manufacturers play with the place of origin and packing to create a quality image.

For Dates syrup, most of the manufacturers in Oman import low quality dates with sufficient sugar content, from KSA or Iran.

##### 3.11.2.1.3 Packaging

For packaged Dates, the different pack sizes available in the market are 250gms, 400gms, 500gms, 1 kg and 2 kg boxes. The fancy packing is done in plastic trays and cane baskets. Imported brands are mainly available in 400gms packing plastic bowls. The branded Dates are available with pits or without pits.



Products are available in plastic buckets, window cartons, polythene packs, plastic boxes, and plates of woven palm leaves, or plastic plates, etc.

Dates syrup is mostly available in squeeze bottles or plastic jars of 400gms or 1kg to 1.4kg packaging.

#### 3.11.2.1.4 Branding

In Oman market, Dates are available as branded or unbranded products. The unbranded or open (sold in bags or buckets) ones are found in the local market (souqs), sold by individuals (mainly farmers) independently or in the popular commercial retail stores.

The branded products are available mainly in the supermarkets and other retail stores like the Airport (Duty free shops) or convenient stores. As per primary survey, the branded products are mainly purchased by the expats (usually when travelling) or by locals for gifting purposes. Also, a large amount of branded products are bought by the large corporates or businesses for gifting purpose. The sales of the branded products are mostly during Ramadan and Eid period. In the international market (India, Europe, etc.), branded Dates (from Oman or other Arab countries) are bought (not frequently) as a nutritional food (dry fruit).

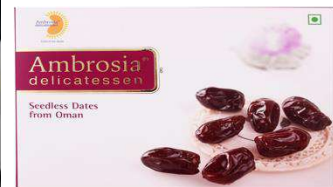
- **Loose Dates (Sold as commodity):** Dates sold as loose Dates or packaged in vacuum sealed plastic bags with limited branding. The product variation is ensured by way of the variety of Dates (i.e., Fardh, Khalas etc.). These are sold mostly in souqs (local markets) and through supermarkets, and other outlets.



- **Boutique products:** This is the premium category of Dates (branded) sold as a gift concept. This varies from all other categories in terms of packaging, promoting, and distribution. Bateel Dates (Saudi Brand) is a classic example of a major player in this category.



- **Packaged Dates (Branded):** In the retail segment, branding of Dates is making great inroads. The branded products “look classy” in terms of packaging, product visibility, product arrangement within the pack etc. It may be noted that the actual Dates (size, variety, consistency, texture) are also in line with the Brand perception that the various processors use to promote. Following are some of the packaged / branded products available in the retail market.



The major market for branded Dates constitutes the institutional segments like Corporates, Catering companies, Hotels, Airlines, etc. Individuals purchase branded Dates mainly to gift it to their near and dear ones on festive occasions

like Ramadan, Eid, Easter, Mother's Day, Valentine's Day, Christmas, Marriages/Birthdays etc.

- **Dates syrup:** The branding is pretty simple for Dates syrup where the container has a printed label with brand name and other details.



### 3.11.2.2 Pricing & Trade terms

#### 3.11.2.2.1 Retail Pricing- Dates

The product pricing varies based on product (variety of Dates, the packing / presentation, the origin etc. Brand plays a vital role in “perceiving quality”. The price of branded packaged Dates varies based on packaging, origin, quality (Fardh, Khalas, etc.) and type (stuffed with dry fruits, coated with chocolate, etc.)

- Omani Dates :
  - Plain packaging : OMR 1.000 to OMR 3.000 per Kg
  - Dates (with dry fruits stuffing) & premium packaging : OMR 3.000 to OMR 15.000 per Kg

- UAE Dates :
  - Plain packaging: OMR 1.500 to OMR 4.500 per Kg
  - Dates (with dry fruits stuffing) & premium packaging : OMR 5.000 to OMR 30.000 per Kg
- Saudi Dates:
  - Plain packaging: OMR 2.500 to OMR 10.000 per Kg
  - High quality Dates (with stuffing) & packaging: OMR 4.000 to OMR 35.000 per Kg

The prices for a package size of 1 kg for various brands available in Oman are as follows;

<b>Brand</b>	<b>Vacuummed packing (Grade 3 dates)</b>	<b>Standard or Plain packaging (Grade 2 dates, eg Fard, Neghal)</b>	<b>Premium packaging (Grade 1 dates, eg. Khallas)</b>	<b>Dates with Almonds or Chocolate</b>
<b>Average Retail Price (RO) for a 1 Kg Pack</b>				
Golden	1.200	1.300 to 1.800	2.000 – 3.000	2.400 – 4.500
Sumail	1.200	1.200 to 1.800	2.500	2.000 – 4.500
Star	1.200	1.200 to 1.600	2.500	2.000 – 4.500
Fruity	-	1.000 to 1.500	2.500	2.000 – 4.500
Crown	-	1.700 to 3.500	5.000	3.000 – 8.500
Madinah	1.200	1.800 to 3.500	5.000	3.500 – 10.500
Kingdom	-	1.800 to 3.500	5.000	3.500 – 10.500
Bateel	-	-	-	8.000 to 35.000

(Source: Primary survey by ABC)

Brand like Bateel Dates chocolates are usually packed in stylish gift boxes of different sizes & shapes. Hence prices vary according to the packing cost.

## 3.11.2.2.2 Retail Pricing- Dates Syrup

<b>Brand</b>	<b>Quantity</b>	<b>Retail Price (RO)</b>
<b>Omani Brands</b>		
Golden Dates	700gm	1.000 to 1.190
	1.4 kg	1.650
Samail Dates	1 kg	1.200
Fruity Bear	1.2 kg	1.700
<b>Imported brands</b>		
Emirates	1 kg	1.500
Crown	1 kg	1.500
Sahara	1 kg	1.600
Kingdom	1 kg	1.800
Bayara	1 kg	1.890
Jomara	1 kg	1.690
	400 gm	1.300

*(Source: Primary survey by ABC)*

## 3.11.2.2.3 Margins

For packaged Dates, the retailer's margins are about 20% to 30% (for both regular & high quality packaged Dates). However, the margins for premium and boutique products are much higher. The manufacturer's margins are around 40% to 50%.

For syrup, the retailer's margin is around 30% and the manufacturers margin is around 25% to 35%.

## 3.11.2.2.4 Trade Terms

The credit terms are usually 60 to 90 days depending up on the credit rating of the retailer.

### **3.11.2.3 Promotion**

Shelf merchandising (occupying primary space) in the supermarkets, small retailers stores, etc., is the major promotion tool. Visible (prominent: at the entrance, etc.) displays during season (Eid, Holidays etc.) are also prevalent.

Omani Dates are promoted with the support of the government through special counters during select period of the year.

The government also conducts seasonal events (markets) for residents/ tourists. The Festival aims at enhancing competition among farmers in caring for Dates palm trees and encouraging investment in the field to increase local production and improve the quality. The Festival also seeks to market Dates palm products in a bid to increase income of farmers and contribute to the growth of the national economy. The following sales promotional efforts are common;

- Promote sales by opening store in Malls/ Hyper market
- Participation in Trade Fair and Government organized (Dates) festival
- Outdoor Advertising
- In store promotions like, Distributing free samples, etc.,
- Shelf rentals, Point of Sales materials etc.

### **3.11.2.4 Distribution**

The manufacturers have a direct distribution network to market their product. The companies have their own delivery vehicles and marketing executives to sell the Dates in various supermarkets around Muscat region. They also take care of the merchandising activities.

The major marketing efforts of these branded Dates are confined to capital region as the demand is more there. The main customers of branded Dates are Muscat duty Free, Airlines, Catering Companies, Supermarkets and institutional segments like hotels, etc.

Most of the Dates is packaged and processed locally and is marketed through wholesalers and retailers. Some companies, however, distribute their products to government institutions such as the Ministry of Defense and the Ministry of Foreign Affairs. Major producers have their own factory outlets to sell directly to consumers.

The foreign brands are marketed by local importers / agents. High end branded products like Bateel or Meshan Dates and Sweets (Oman), are sold through exclusive outlets owned / franchised by the parent company.

### 3.12 NEW PROJECTS IN OMAN

The Ministry of Agriculture and Fisheries is working with Oman Food Investment Holding Company SAOC (OFIC), the government's agricultural and farming investment arm, to harness the commercial potential of the nation's Dates palm sector beyond the current focus on the harvesting and marketing of Dates. **The Omani Dates Production and Packaging Company SAOC, was established in 2018.** The company will purchase dates products from farmers then process, package and sell them in the local markets and export them.

According to the Report on National Projects to Develop Dates Sector in the Sultanate the factory's initial production in the first phase will reach 30,000 tons annually and is proposed to reach 80,000 annually in the final phase. The factory will distribute 20 percent of its production in the local market and 80 percent for export. It is expected that the factory will start production within two years.

### 3.13 PROPOSED MARKET MIX STRATEGY FOR THE PROJECT

#### 3.13.1 Target market

##### 3.13.1.1 Geographic coverage

The project should focus on pan-Oman sales primarily. The export market and margins are small and could be looked at once the brand is established.

##### 3.13.1.2 Target segment

- Retail (Super and Hypermarkets)
- Tenders (Govt. office, Duty Free, Hotels, Airlines, etc.),
- Corporate gifts (Private & Public sector – Dewan office, ministries, etc.)

#### 3.13.2 Product

##### 3.13.2.1 Types of Dates

These are few of the Omani Dates varieties the client can look at procuring for sales. The data is collected through secondary survey.

Variety	Product Specialty
Hilali	Cultivated in various parts of the Sultanate, this late-season crop has light yellow Dates with 60 per cent sugar content.
Khalas	The most valuable Dates crop, the khalas thrives in the Interior, Sharqiya and Dhahirah region, besides Al Rostaq. With 65 per cent sugar, it is among the most delicious. The fruit is bright yellow, oval-shaped, and is eaten either fresh or half-dry.
Khasab	A late-season crop, the khasab grows in all Dates-farming regions of the Sultanate, though quality yields come from Al Rostaq, Ibri and parts of the Sharqiya region. The fruit is dark red in colour, but some sub-types are yellowish.



Variety	Product Specialty
Khunaizi	Cultivated in most areas of the Sultanate, these dark red Dates can usually withstand high humidity levels. They are relished fresh in season or dry outside the season.
MebSELLi	A mid-season crop, the mebselli, in line with traditional practice, is cooked and dried and exported to markets in the Indian sub-continent. It is also eaten fresh or naturally dried. It grows extensively in the Interior, Sharqiya, Dhahirah and Batinah regions.
Naghal	An early crop, the Naghal is sensitive to humidity and thrives best in the hot, arid Interior region. A large part of the Naghal harvest is destined for Oman's Dates processing factories.
Qashtabaq	Reddish-yellow in colour, these oblong Dates grow in the Interior, Dhahirah and Batinah regions. Sugar content is pegged at a significant 68 per cent.

### 3.13.2.2 Product variants

Product	Total (%) of the business
Packaged Dates (Grade 1 quality)	15%
Packaged Dates (Grade 2 quality)	35%
Packaged vacuumed Dates (Grade 3 quality)	30%
Packaged Dates (stuffed with dry fruits, chocolate covered, etc. with focus on packaging)	20%

### 3.13.2.3 Packaging

The regular packing is recommended in plastic trays or paper boxes. The quality of packaging material has to be better for premium Dates or Dates with stuffing of dry fruits. Following are the recommended package size:

Product	Product packaging sizes
Packaged Dates (with and without seeds)	400gms, 750gms & 1Kg
Dates (stuffed with nuts) with regular or standard packaging	250 g, 500gms, 1Kg
Premium packaged Dates (stuffed with dry fruits, chocolate covered, etc. with focus on packaging)	250gms, 500gms

However, for high end premium products or export products, the use of fancy and decorative trays/ baskets boxes could be used. A special packaging or line of products could be developed for corporate segment and in retail for festivals, birthday marriages, and other special occasions.

Dates syrup is packed in plastic jars and squeeze bottles.

### 3.13.2.4 Branding

Branding will play a major role in developing and establishing the product. The consultants recommend considering the following points when branding the products:

- Origin
- Traditional value
- Health benefits
- Include thematic packaging (dessert, oasis, strength) reflecting the “Omani-ness” to the product

### 3.13.3 Pricing

#### 3.13.3.1 Pricing Structure

The pricing will be a function of the product and packaging. The following table provides further details on the same.

<b>Product type (Dates only)</b>	<b>Delivered price to retailer</b>		<b>End-user price (30% markup) - Proposed Products</b>
	<b>By the competition</b>	<b>Proposed for the project</b>	
	<b>Rate Per kg.</b>		
<b>Premium dates (eg. Khallas)</b>			
<i>with seeds - plain</i>	1.450	1.385	1.800
<i>Seedless - plain</i>	1.750	1.690	2.200
<b>Grade 2 dates (e. Fard, Neghal)</b>			
<i>with seeds - plain</i>	1.000	0.920	1.200
<i>Seedless - plain</i>	1.350	1.230	1.600
<b>Grade 3 (vacuumed dates) - with seeds</b>	0.800	0.730	0.950
<b>Product type (Assorted Dates)</b>	<b>Delivered price to retailer</b>		<b>End-user price (25% markup) - Proposed products</b>
	<b>By the competition</b>	<b>Proposed for the project</b>	
	<b>Rate Per kg.</b>		
<i>Dates with almonds or other nuts</i>	1.650	1.600	2.000
<i>Dates with chocolate</i>	2.100	2.000	2.500
<b>Product type (Dates syrup)</b>	<b>Delivered price to retailer</b>		<b>End-user price (30% markup) - Proposed products</b>
	<b>By the competition</b>	<b>Proposed for the project</b>	
	<b>Rate Per kg.</b>		
<i>Dates syrup</i>	0.700	0.690	0.900

As discussed earlier, the proposed pricing is only an entry level pricing and conservative in nature. As the product / brand is established and the unit explores distribution channels, the margins would improve substantially.

#### 3.13.3.2 Trade terms

The trade terms for different customer segments will be different. While the retail stores and the institutional segment will be provided with a credit period of up to 90 days, the premium segment sales will be predominantly cash sales.

### 3.13.4 Promotion

- Banners, flyers (in the hyper, super markets)
- Participation in Trade Fair & festivals (Muscat Festival, Omani Products promotions efforts of the Govt.)
- Advertising with attractive consumer schemes
- In store promotions like, Distributing free samples, etc.,
- Outdoor campaigns, Shelf rentals, Point of Sales materials etc.
- Selling products with thematic packaging (Arabian theme, etc.)
- Advertising on social media platforms

### 3.13.5 Distribution

<i>Focus Segment</i>	<i>Channel of Distribution</i>
Retail segment	Own distribution network/merchandising activities
Institutional Segment: <i>Ministries, Diwan, other government agencies, Corporates and premium stores</i>	Direct sales & participation in tenders

### 3.14 PROJECTED MARKET SHARE/ SALES VOLUMES

#### 3.14.1 Packaged Dates

Based on the market survey in the primary market, we estimate the market share of the new entrant for the first 5 years to be as illustrated in the table below.

Segment	Total demand in the next 5 years (in tons)				
	2023	2024	2025	2026	2027
<b>Total Demand</b>	43,756	44,949	46,179	47,446	48,753
Packaged Dates (Grade 1 quality) - 15 %	6,563	6,742	6,927	7,117	7,313
Expected market share for the new entrant	5%	6%	7%	7%	7%
<b>Total production expected</b>	<b>328</b>	<b>405</b>	<b>485</b>	<b>498</b>	<b>512</b>
Packaged Dates (Grade 2 quality) - 35%	15,315	15,732	16,163	16,606	17,063
Expected market share for the new entrant	5%	6%	7%	7%	7%
<b>Total production expected</b>	<b>766</b>	<b>944</b>	<b>1,131</b>	<b>1,162</b>	<b>1,194</b>
Packaged vacuumed Dates (Grade 3 quality)- 30%	13,127	13,485	13,854	14,234	14,626
Expected market share for the new entrant	5%	6%	7%	7%	7%
<b>Total production expected</b>	<b>656</b>	<b>809</b>	<b>970</b>	<b>996</b>	<b>1,024</b>
Packaged Dates (stuffed with dry fruits, chocolate covered, etc. with focus on packaging) - 20%	8,751	8,990	9,236	9,489	9,751
Expected market share for the new entrant	6%	8%	10%	10%	10%
<b>Total production expected</b>	<b>525</b>	<b>719</b>	<b>924</b>	<b>949</b>	<b>975</b>
<b>Total dates processed and packaged by the proposed Project</b>	<b>2,275</b>	<b>2,877</b>	<b>3,510</b>	<b>3,606</b>	<b>3,705</b>
Market share of the new entrant for processed and packaged dates	5.2%	6.4%	7.6%	7.6%	7.6%

*(Assumptions based on primary survey & discussions with retailers)*

### 3.14.2 Date Syrup

Product	Consumption in Oman (tons)				
	2023	2024	2025	2026	2027
Dates syrup- Total demand	1,197	1,221	1,245	1,270	1,296
Projected market share	5%	6%	7%	7%	7%
Production by the new entrant	60	73	87	89	91

*(Assumptions based on primary survey & discussions with retailers).*

### 3.15 PRODUCTION CONSIDERED FOR FINANCIAL ANALYSIS

The following table illustrates the summary of the possible sales as indicated in the table above) and the conservative sales estimates considered to assess the financial viability of the project:

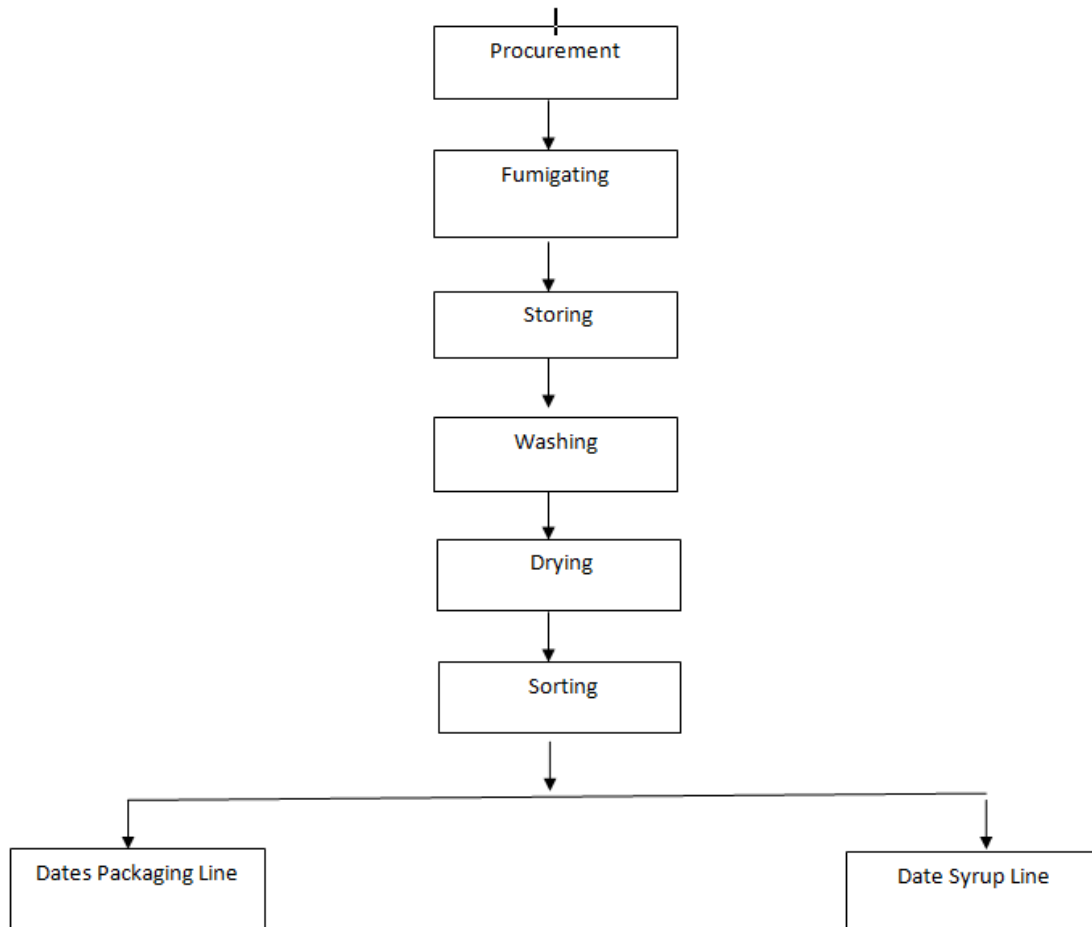
Product	Potential Sales & Sales Considered to assess financial viability <b>(All figures in Tons)</b>				
	2023	2024	2025	2026	2027
Packaged Dates (Grade 1 quality) (Possible sales as per the market potential)	328	405	485	498	512
<b>Considered for Financial Projection</b>	<b>280</b>	<b>320</b>	<b>400</b>	<b>400</b>	<b>400</b>
Packaged Dates (Grade 2 quality)	766	944	1131	1162	1194
<b>Considered for Financial Projection</b>	<b>630</b>	<b>720</b>	<b>900</b>	<b>900</b>	<b>900</b>
Packaged vacuumed Dates (Grade 3 quality)	656	809	970	996	1024
<b>Considered for Financial Projection</b>	<b>490</b>	<b>560</b>	<b>700</b>	<b>700</b>	<b>700</b>
Value added products (Possible sales as per the market potential)	525	719	924	949	975
<b>Considered for Financial Projection</b>	<b>428</b>	<b>489</b>	<b>611</b>	<b>611</b>	<b>611</b>
Date Syrup ((Possible sales as per the market potential)	60	73	87	89	91
<b>Considered for Financial Projections</b>	<b>53</b>	<b>60</b>	<b>75</b>	<b>75</b>	<b>75</b>

## 4 TECHNICAL ANALYSIS

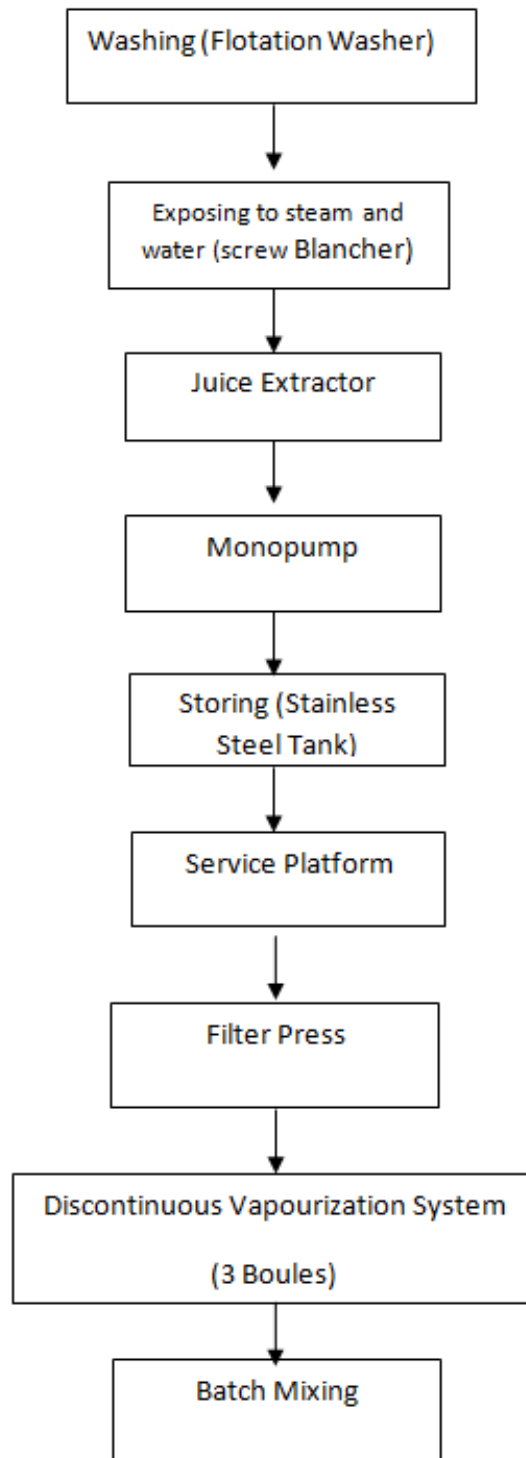
### 4.1 LOCATION AND LAND

The project is proposed to be located in the Samayl Industrial Estate (Dakhliyah region) of Oman. The land area for the project is 5,000 sq. meters.

### 4.2 DATES MANUFACTURING PROCESS



#### 4.3 DATES SYRUP MANUFACTURING PROCESS





#### 4.4 PLANT AND MACHINERY

The following are the key machinery (production and storage) required for the manufacture of packaged dates and Date syrup. It may be noted, there is limited level of automation possible with respect to dates processing and most of the value added products are manufactured manually under hygienic conditions.

- Dates Processing Machine
  - Dates Vacuum machine
  - Stuffed Dates
- Dates Syrup Machinery
- Cooling Store
- Freezing Store
- Fumigation room

#### 4.5 MACHINERY SUPPLIERS - ILLUSTRATIVE LIST

No.	Detail
1	SAB FPM İkitelli O.S.B MAH , Dersan Sanayi sitesi , B BLOCK , Apt No. 1/093 Başakşehir/ İstanbul Contact Number+90 537 521 97 71, +90 553 160 00 00 <a href="https://sab-sy.com/">https://sab-sy.com/</a>
2	Unisorting via Tratturo, 320 47032 Bertinoro FC - Italy ph. +39 0543 1710230 <a href="mailto:info@unisorting.com">info@unisorting.com</a>
3	Mariat for Trade and Industry Exit 5, Al morouj, King Abdulaziz st. Riyadh PH 0509811155 <a href="mailto:info@mariat.sa">info@mariat.sa</a>

#### 4.6 PROCESSING CAPACITY

The machinery is proposed to be purchased from Mariat for Trade and Industry, based in Riyadh, KSA.

Following are the annual output capacity of the various products:

- Packaged dates: 4000 Tons
- Value added products: 1222 tons (about 1000 tons of dates + dry fruits / chocolate etc.)
- Date syrup: 150 tons

It has to be noted while the above are the output levels, the project needs to handle more raw material considering the wastage at various levels. A wastage of 20% is considered at the dates ripening and cleaning stage and a 5% rejection is considered at the final processing / packaging stage. Hence, the project will be able to handle larger quantity of raw dates (about 25% more than the output).

#### 4.7 BUILDING AREA

The proposed plant will be built accordingly:

<b>Segments</b>	<b>Area in Sq. m</b>
<b>Total land area</b>	<b>5,000</b>
<i>Factory building area</i>	<i>2,388</i>
<i>Admin building area</i>	<i>243</i>
<i>Area of electricity room and pumps</i>	<i>46</i>
<b>Total area of construction</b>	<b>2,677</b>
<b>Other Areas</b>	
Cold Store	445
Service room	126.36
Production hall	686.7