PALTRADE

مركز التجارة الفلسطيني - بال تريد

PALESTINE TRADE CENTER

Gaza Strip

Crossings Bi- Monthly Monitoring Report

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REPORT CONTENT

GLOSSARY:

Gaza Crossings: For the names and brief overviews of the Gaza crossings referred to in this report, see Annex 3.

Time Periods: The report refers to time periods associated with policy changes and periods of relative calm or unrest. In some instances, actual time periods are denoted, such as June 2007. In other cases, they are referred to by names associated with major events or conditions, such as Closure or Truce. For a description of these, see Annex 4.

AMA	Agreement on Movement and Access, signed on November 15, 2005 http://www.eubam-rafah.eu/portal/node/11
Basic Commodities	Wheat, flour, rice, sugar, cooking oil, and other non-luxury food supplies.
Closure days , Scheduled	Days during which a crossing is normally scheduled to be closed. This includes official holidays and, in most cases, Saturdays.
Closure days, Unscheduled	Days in which a facility is closed for unusual or unexplained reasons. This includes closures for security reasons.
Conveyer Belt	This refers to a conveyor belt at the Al Montar Crossing which was used before the closure on June 2007 exclusively for transferring aggregates from the Israeli to the Palestinian side. Currently, the conveyer belt is the only facility functioning at Al Montar and is used for transferring grains including wheat, pulses, seeds, and animals feed into Gaza.
Commercial Goods	Goods that are imported by commercial establishments in the private sector, and are distributed through commercial outlets in the open market.
Exports	Truckload movements outbound from the Gaza Strip, regardless of destination.
Humanitarian Goods	Basic foods (e.g. rice, cooking oil, etc.), medicines, and other goods brought in by humanitarian agencies.
Imports	Truckload movements inbound to the Gaza Strip, regardless of origin. Includes both commercial and humanitarian goods.
Scheduled days for operations	Total days in a month less Scheduled Closure days
Tunnels	Underground passages between the Gaza Strip and Egypt used for the informal transfer of goods. Use of tunnels increased after the June 2007 closure.

PERFORMANCE SUMMARY

CROSSINGS SUMMARY

During this period (June–July. 2010), imports marked a total of 6,733 truckloads of commercial and humanitarian freight entered into Gaza representing 36 % of the pre-closure average import levels. The large majority of these truckloads were food and animal feed (64%) and (14%) of these truckloads were designated for humanitarian aid agencies. Notwithstanding the new Israeli polices in Gaza, Israel still bans exports from Gaza (to the West Bank, Israel and the rest of the world) causing the scale of economic activity to remain heavily dependant on domestic demand. Therefore, the ban is indirectly and negatively affect the economic activity taking into consideration that the domestic demand is constrained by the low purchasing power of the population and the relatively small size of the local market.

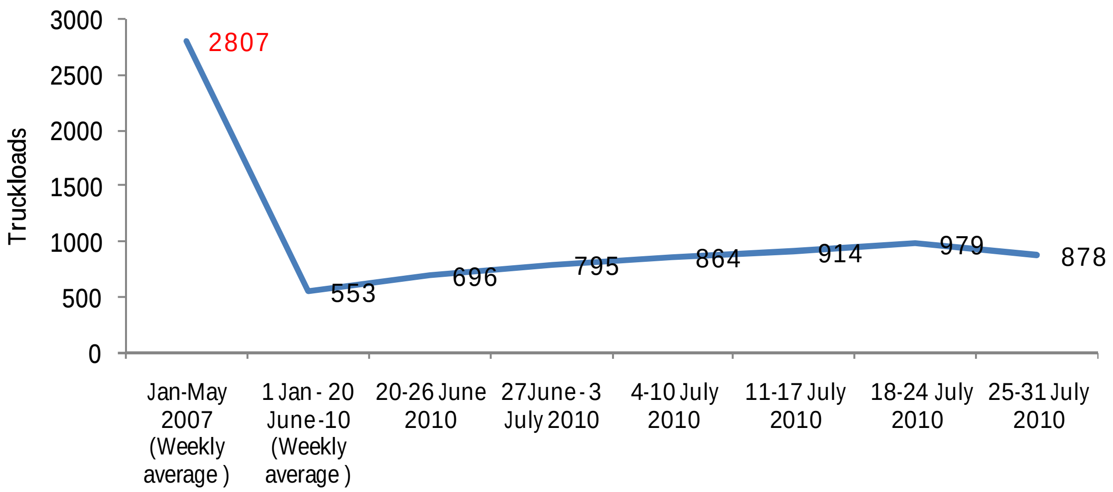
Al Montar Crossing Conveyer Belt was open for 16 days (about 31% of the scheduled days of operation) and processed imports of 1,550 commercial truckloads of wheat and animal feed (23 % of total imports).

Karem Abu Salem Crossing was open for 41days (about 80% of scheduled days of operation) and processed imports of 5,183 truckloads, primarily consisting of consumers items,

Sufa Crossing was closed during this period, as it has been closed since September 12 ,2008. There are indications that Israel intend to stop using this facility entirely. [1]

Fuel Movement during this period, Nahal Oz entry point was totally shut down and fuel transfer to Gaza Strip has been shifted to Karem Abu Salem Crossing. A total of 109,904 liters of petrol and 393,296 liters of diesel allocated for UNRWA were processed into Gaza Strip. In addition, 8 million liters of industrial gasoline for the Gaza Power Plant (GPP) and 8 million kg of cooking gas were processed into Gaza Strip. These imports are markedly below estimated needs, particularly regarding imports of cooking gas. For more information, see Fuel Import Performance in page 6 of this report.

Weekly Imported Truckloads during Different Periods



[1] OCHA Field Update on Gaza from the Humanitrian Coordinator, Jerusalem, 10 - 16 March 2009.

SECTION 1: CROSSINGS' PERFORMANCE

A CROSSINGS' OPERATIONS

A-1 Al Montar Crossing (Conveyer belt)

Al Montar Crossing was opened for 8 days in June and 8 days in July 2010. Table 1 below presents the operating days and cargo movements during June and July 2010.

Table (1): Summary of the performance at Al Montar Crossing during June - July 10

	June-10	July-10
Scheduled days for operations	25	26
Scheduled closure days[1]	5	5
Unscheduled closure days[2]	17	18
Actual days for operation	8	8
Total exports (truckloads)	0	0
Total imports (truckloads)	764	786
Humanitarian imports (%)	10%	10%
Commercial imports (%)	90%	90%
Average daily import volume (truckloads) when open	96	98
Average daily import volume (truckloads) for all days scheduled for operations	31	30

A-2 Karem Abu Salem Crossing

Karem Abu Salem Crossing was opened for 21 days in June and 20 days in July 2010. Table 2 below presents the operating days and cargo movements during June and July 2010.

Table (2): Summary of the performance at Karem Abu Salem Crossing during June - July 10

	June-10	July-10
Scheduled days for operations	25	26
Scheduled closure days[1]	5	5
Unscheduled closure days[2]	4	5
Actual days for operation	21	20
Total exports (truckloads)	0	0
Total imports (truckloads)	2,199	2,984
Humanitarian imports (%)	16%	15%
Commercial imports (%)	84%	85%
Average daily import volume (truckloads) when open	105	142
Average daily import volume (truckloads) for all days scheduled for operations	88	119

[1] Crossings were closed on Saturdays and holidays.
[2] Karem Abu Salem was closed for security reasons and Al Montar was closed for unknown reasons

SECTION 1: CROSSINGS' PERFORMANCE continued

B CARGO ACTIVITY

B.1- Export Activity

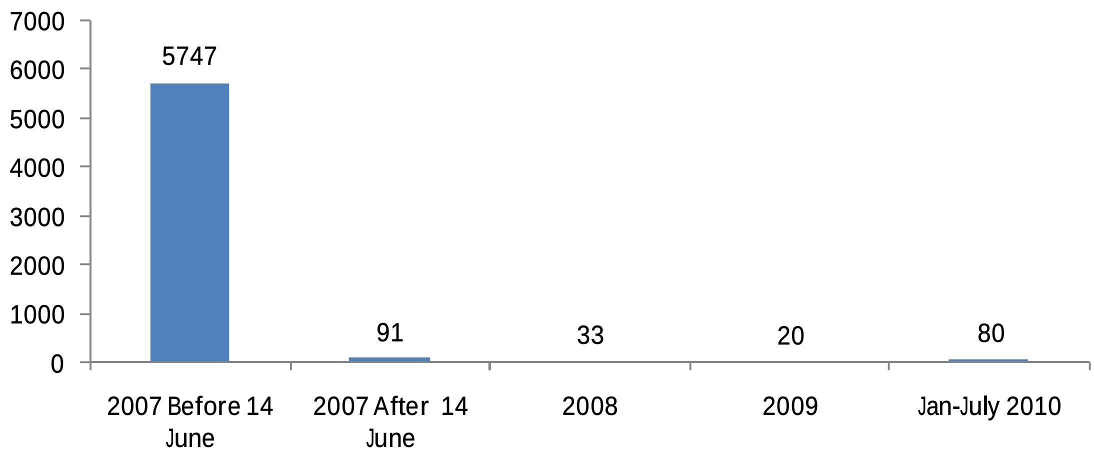
Despite the ongoing ban on exports from Gaza Strip, Israel allowed the exports of cut flowers and strawberries for the season 2009-2010. Since December 10, 2009, 117 truckloads exited Gaza representing 86 truckloads of cut flowers (13.8 million stems) until April 19, 2010 and 31 truckloads of strawberries (50 tons) until February 9, 2010. It shall be noted that exports of cut flowers and strawberries have been withhold before the end of season due to the unprofitable prices in the export markets. Exports took place after the intervention of the Dutch government and were limited to two types of goods. The Agricultural Development Association (PARC) indicated that 750 tons of strawberries and 20 million cut flowers were slated for export during this season (ending on 15 February for strawberries and 10 May for cut flowers).

PARC, through "Maintaining & Developing the Cash Crops Sector in the Gaza Strip" project- funded by the Netherlands Representative Office " NRO" and renewed for the fourth year, will support planting 308 dunums of carnations, 350 dunums of strawberries, 25 dunums of sweet peppers, and 25 dunums of cherry tomatoes for the next season 2010/2011. For this purpose, the Israeli side allowed the entry of most of the needed cultivation inputs. For instance, one truckload of strawberry seedling was allowed entry in mid march 2010, whereas the last entry of strawberry seedlings was permitted in 2006. The new seedlings are very crucial for improving the quality and increasing the harvest of the produce. The carnations planting season have started in June 2010, while the preparation and the planting of strawberries will start in mid August and September respectively.

Despite relaxing the restrictions on imports, allowing the exports will certainly remain the major challenge that the private sector will ever experience, as the sector has been coping with this challenge since mid June 2007. Lifting all the restrictions on the exports will have a positive impact on the private sector. However, the capacity, infrastructure, and equipments of Karem Abu Salem/Kerem Shalom Crossing, the current main operating crossing, urgently needs to be improved in order to secure efficient and safe crossing of large quantities of perishable crops which are supposed to arrive the final destination in a good conditions, otherwise exporting agricultural crops will become unfeasible.

See figure 1 for the annual export trends from June 2006— July 2010 and figure 7 for the export trends for the key export sectors

Figure (1): Total Annual Export Volume (by truckloads)



SECTION 1: CROSSINGS' PERFORMANCE continued

B CARGO ACTIVITY continued

B.2– Import Activity

A total of 6,733 truckloads entered into the Gaza Strip during this period (2,963 truckloads in June and 3,770 in July). Since June 2007, import volumes have been between 19% and 36% of pre-closure levels (see Figure 2). Although the volume and variety of imports have increased after the new Israeli polices in Gaza since June 20, 2010, imports volume is still representing 36 % of the monthly average of truckloads that entered into Gaza before the imposition of the blockade in 2007.

Figure (2): Imports into Gaza in June– July 10 versus monthly averages of different periods (truckloads)

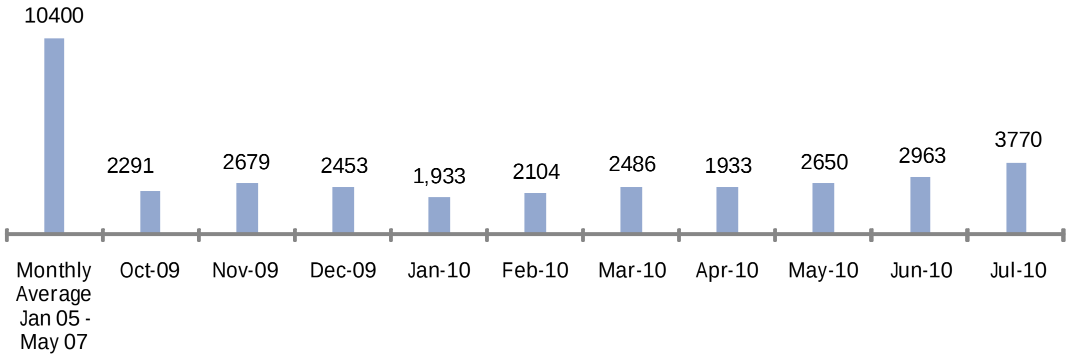
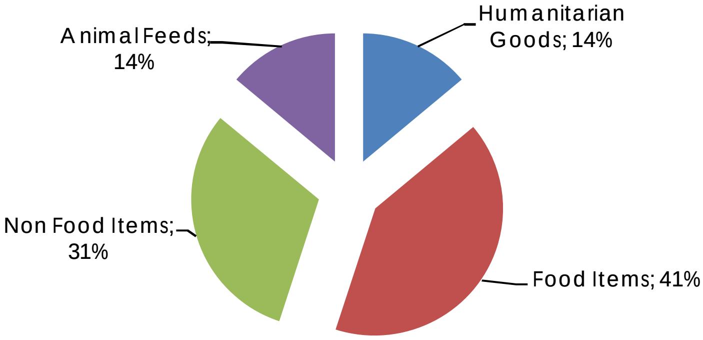


Figure (3): Types of imported goods in June – July 10 through all crossings



Non Food Items include:

Nylon, Agricultural Fertilizer, Veterinary Medicine, Egg's Carton, Medical supplies, Chlorine and Agricultural Materials, Glass, Wood, clothes, Shoes, Aluminum, toys ,kitchen kit ,stationary, home appliances, cloth fabrics, cosmetics products, mattresses, constriction tools, furniture, sanitary tools, equipments, personal care and empty cans, cartons, and others.

SECTION 1: CROSSINGS' PERFORMANCE continued

C FUEL IMPORTS PERFORMANCE

On January 1, 2010, the Israeli authorities announced that the Nahal Oz Crossing, which was used for the transfer of fuel from Israel to Gaza, is no longer operational (totally shut down). Subsequently, fuel imports has been shifted to Karem Abu Salem Crossing ever since. No Israeli petrol or diesel entered Gaza during this period (June –July. 2010), with the exception of 370,431 liters of petrol and 695,895 liters of diesel for UNRWA.

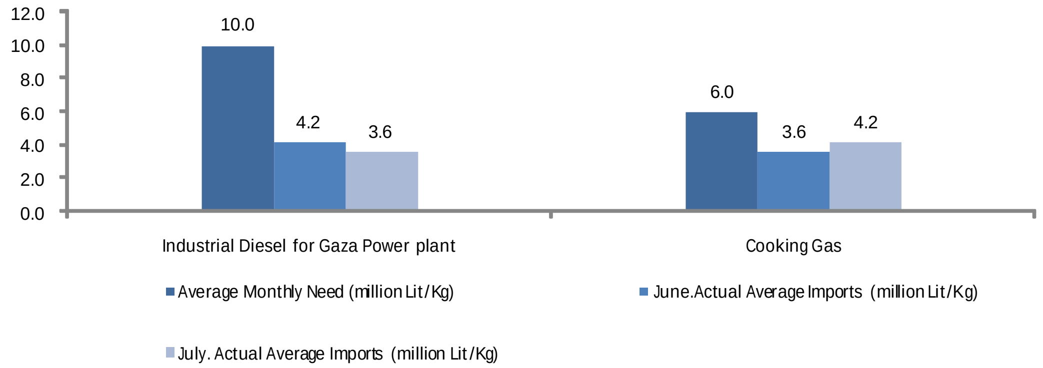
Nevertheless, the Gaza marketplace is still mostly reliant on the fuel being transferred from Egypt through the tunnels under the Gazan-Egyptian border (due to its availability and cheap prices). As per the UN-OCHA report, the rate of these movements through the tunnels is nearly 100,000 liters of diesel and 100,000 liters of petrol per day (1) .

Moreover, Cooking gas imports were only around 49% of average needs while industrial gasoline imports for the Gaza Power Plant (GPP) were only around 39% of average needs during this period. (see figure 4 below)

Table (3): Summary of fuel and gas imports in June – July 10

Type	June -10	July-10
	Karem abu Salem	Karem abu Salem
Petrol (liter)	203,499	166,932
Diesel (liter)	445249	250,646
Industrial Gasoline (liter)	4,197,701	3,649,490
Cooking Gas (kg)	3,553,701	4,207,161

Figure (4): Illustration of average fuel needs(2) vs. actual fuel imports



(1) Source: Protection of Civilians: 12-18 September 2009 UN OCHA oPt

(2) Based on estimates by the Petroleum & Gas Station Owners Association-Gaza.

SECTION 2: PRIVATE SECTOR PERFORMANCE

A PERFORMANCE OF KEY SECTORS

Gaza's private sector has slightly improved after new Israeli policies since June 20, 2010. However, this level of improvement does not reach the acceptable stability levels with regard to allowed raw materials and their essential integration. In addition, imports form abroad have a negative impact on the local production as many businesses in Gaza were totally closed due to either imports of similar products or restrictions on importing essential raw materials. Despite the fact that Israel has loosen the strict blockade on Gaza since 2007, Israel still strictly ban exports from Gaza (to the West Bank, Israel and the rest of the world) causing the scale of economic activity to remain heavily dependant on domestic demand. Therefore, the ban has indirectly a negative impact on the economic activity taking into consideration that the domestic demand is constrained by the low purchasing power of the population and the relatively small size of the local market.

Tables (4) and (5) present data on employment, firm numbers, and exports for furniture, garment, and processed food sectors before the closure, during the closure, and currently. The increase in number of working establishments is due to the coping mechanisms used, noting that the establishments are working with 10%-60% of total capacity.

Table (4): Key Industrial sectors status during three distinguished periods

Sector	Indicator	Before Closure (14 June 2007)	During the Closure 2008	Currently June– July 2010	Notes
Industry	No. of Working Est.	3,900	117	1365 *See notes*	- *15% of establishments are working with 30%-60% capacity* - *20% operating with around 20% capacity* - *65% of industrial establishments are closed*
	No. of Workers	35,000	2000	6,000	
Construction	No. of Working Est.	125	8	50	(current scope include small maintenance works)
	No. of Workers	50,000	100	1,500	

Source: Palestinian Federation of Industries "PFI", Palestinian Contractors Union "PCU"

Table (5): Key Industrial sectors status during three distinguished periods

Industry	Normal Situation 2005			During the closure 2008			Currently June– July 2010		
	Employment	*Establishment*	*Monthly exports*	*Employment*	*Establishment*	*Monthly exports*	*Employment*	*Establishment*	*Monthly exports*
Furniture	6,500	600	168	75	25	0	370	105	0
Garment	25,000	660	172	100	30	0	330	80	0
Processed Food	2,500	100	140	120	20	0	350	55	0

Source: Palestinian Federation of Industries "PFI".

SECTION 3 : GAZA CROSSINGS PERFORMANCE DURING DIFFEREN PERIODS

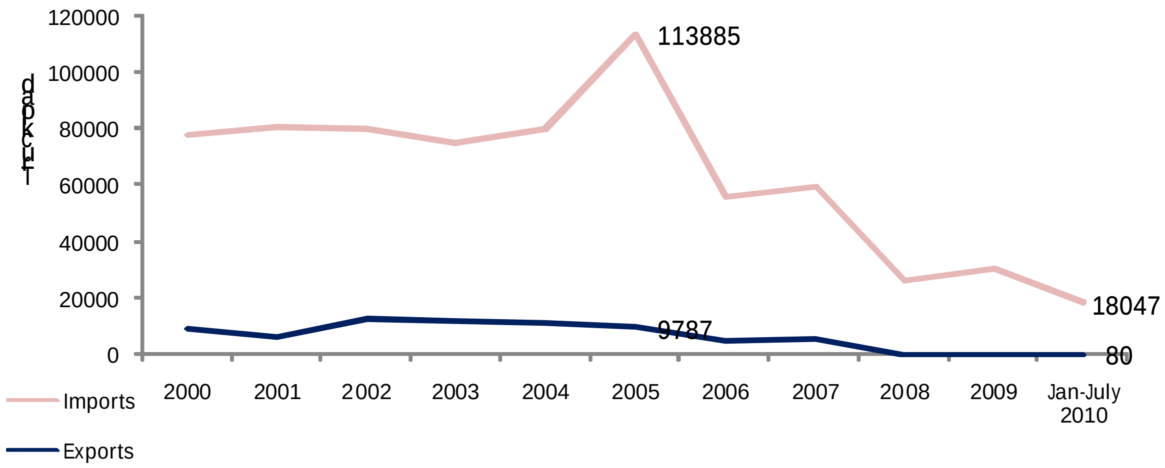
A OVERVIEW

Since June 2007, Israel has imposed a strict blockade allowing only limited list of goods to enter into Gaza. As a result, the tunnel trade had improved and flourished during this period because the allowed products into Gaza were only around 72 items. The harsh Israeli blockade policy has caused (80%-90%)of the private sector institutions to shutdown. Therefore, the Gaza economy became import oriented and dependent on humanitarian aid. Before the closure, Gaza manufacturers imported 95% of raw materials needed to their businesses. In addition, about 76% of their furniture products, 90% of their garments and 20% of their food products were exported to Israel, and some to the West Bank.

Since the Israeli announcement to ease the blockade on Gaza on 20 June, 2010, the number of imported truckloads has significantly increased (21% in July compared to June). Imports allowed into Gaza are mainly consumer goods and limited quantities of 'productive items'. Despite this improvement, imports into Gaza represent only 36% of the pre-closure levels. Therefore, it is still too early to realize any benefits from the new Israeli policy taking into consideration that: (a) current import levels have not reached the pre-closure levels; (b) construction materials are still banned entry into Gaza; and (c) Israel still bans export from Gaza.

In short, the Palestinian private sector in Gaza has lost its competitive edge in the local and external markets which has become more difficult and costly to reverse. Most Gaza industries are export-oriented and used to have purchase and supply contracts with Israeli and other firms.

Figure (5): Gaza Imports and Exports for various years of different periods (truckloads)



B CROSSINGS PERFORMANCE TRENDS

The performance of Gaza commercial crossings has changed during the last three years . First, AlMontar/Karni has been shifted from being the main crossing for imports and exports (An average of 450 truckloads a day used to be imported, and an average of 50 truckloads a day were exported) to become a secondary crossing for the limited imports of grains and animal feeds). Sufa Crossing has been transferred from being the main crossing for imports of construction materials to being totally closed since September 12, 2008). Finally, Karem Abu Salem/Kerem Shalom, has been transferred from being a small crossing for imports of humanitarian aids from / through Egypt to become the main crossing for most Gaza's imports from the West Bank, Israel, and other countries (see Table 6 below).

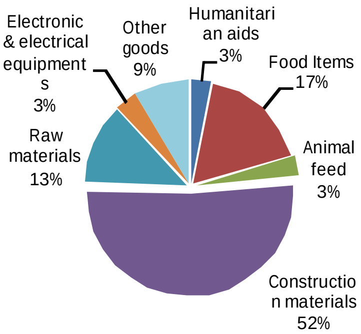
Table 6: Comparison of Average Daily Exports and Imports During the Different Periods

	Average Daily Exports					Average Daily Imports				
Crossing	Before June 2007	After June 2007	During Truce 2008	After War 2009	After 20 June 2010	Before June 2007	After June 2007	During Truce 2008	After War 2009	After 20 June –2010
AlMontar	50	0	0	0	0	450	62	55	30	31
Karem Abu Salem[1]	0	0	0	0	0	20	28	23	65	103
Sufa	0	0	0	0	0	160	65	26	0	0

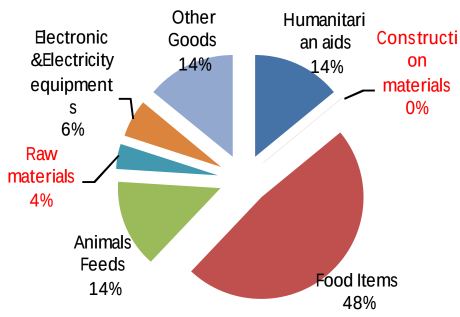
C CARGO IMPORT ACTIVITY

Since June 14, 2007, import volumes have been between 2% and 36% of pre-closure levels, in terms of both volume and types of goods; see figure 5 which illustrates types of allowed imported goods for different periods. As can be seen in the pie charts below (figure 6), humanitarian aid increased from 3% (pre closure) to 14%. In contrast, construction and raw materials decreased from 65% (pre closure) to 4% during June and July 2010. Consequently, the lack of imported construction materials, in particular, has altered Gaza economy from a manufacturing-based one to an economy that is more aid dependent.

Figure (6): A Comparison of the Types of Imported Goods through All Crossings in the Different Periods



Before the Closure



June and July 2010

[1] A total of 224 truckloads of cash crops were exported from June 2007 to July 2009

SECTION 3: CROSSINGS' PERFORMANCE continued

C CARGO EXPORT ACTIVITY

Before the closure, the monthly average of exported goods in 2005 were approximately 1034 truckloads (47 truckloads per day), composed of furniture, garment, cash crops, vegetables, processed food, metal products, handicrafts, and other types. Since the start of the closure regime in June 2007, no export activity was allowed except for a total of 224 truckloads of cash crops which were exported through Karem Abu Salem Crossing.

See figure 6 for the annual export trends from June 2006— July 2010 and figure 7 for the export trends for the key export sectors.

Figure (6): Total Annual Export Volume (by truckloads)

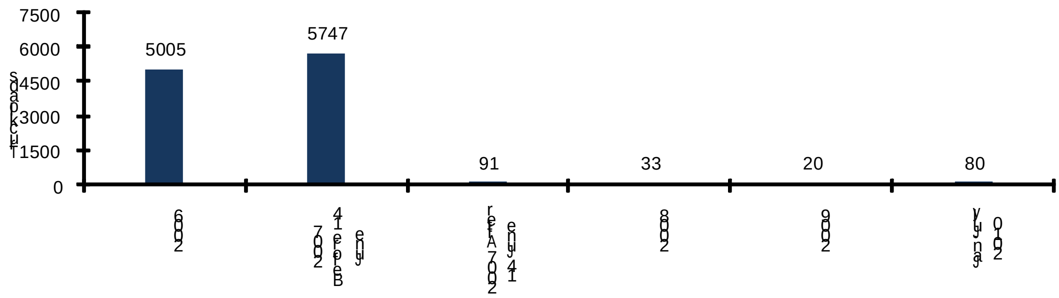
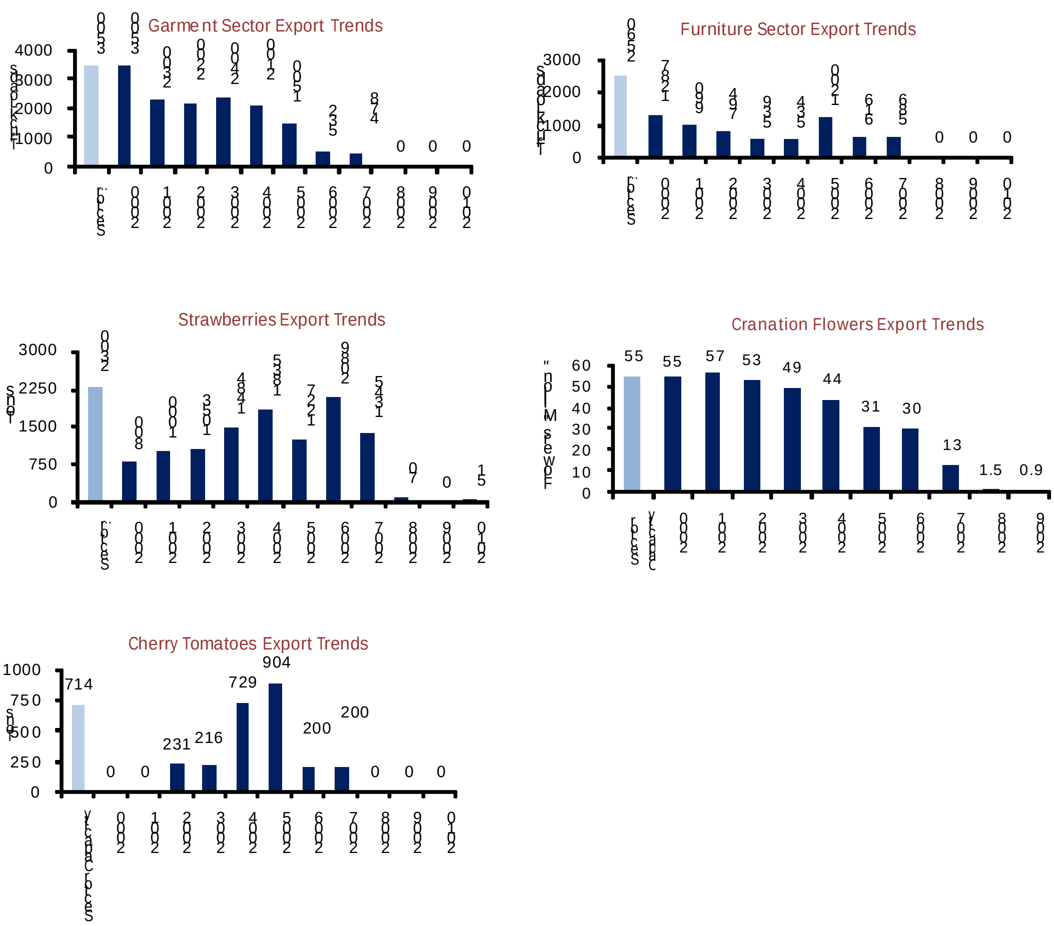


Figure (7): Total Annual Export Volume vis-à-vis sector export capacity per each key sector (by truckloads)



ANNEX 1: PROJECT OVERVIEW

Commercial Crossings Monitoring Program—Cargo Movement and Access Monitoring and Reporting Program

Because of its designation as the National Trade Development Organization, PalTrade is the private sector institution with a mandate to promote trade development. 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. As such, PalTrade has been a member of the Gaza withdrawal technical committees and negotiations team; especially providing the private sector perspectives of the Access and Movement Agreement (AMA) for the cargo movement at the crossings. PalTrade is also a private sector representative in the Crossings' Steering Committee which was formed by the President of the Palestinian Authority to act as the coordination body for the reform and development of the border crossings.

As part of the World Bank project "Facilitating Trade Flows between WBGS and Israel" and the previous "Private Sector Participation in Gaza Withdrawal Coordination Process" project, PalTrade has maintained a physical presence at Al Montar/Karni since August 24th, 2005. As such, PalTrade is the only independent source of crossings information which is used by the Quartet, the World Bank, the US Security Coordinator, UN OCHA and others.

PalTrade's work regarding the Crossings includes monitoring, collection and data analysis.

Financing for the border monitoring activities in the:

- First year; was through a World Bank grant to the PA in association with emergency support during the Gazan disengagement.
- Second year; was through a Post Conflict Fund grant which was closed in September 2007.
- Third, Fourth and Fifth years; is being provided by the Norwegian Consultant Trust Fund under the supervision of the World Bank (MNSED Finance and Private Sector Unit).

Financed by:
Norwegian Consultant Trust Fund

Under the supervision of:
The World Bank
(MNSED) Finance and Private Sector

ANNEX 2: GAZA CROSSINGS OVERVIEW

There are six crossings along the Gaza strip boundaries to facilitate imports and exports. Four of the crossings are controlled by the Israeli government. The Rafah crossing is under the joint control of the Palestinian Authority and the European Union. The recently constructed Karem Abu Salem/Kerem Shalom crossing is temporarily being employed for movements between Israel and Gaza, but is intended for trade between, on the one hand, Egypt and, on the other hand, Gaza and Israel.

AlMontar/Karni

Al Montar/Karni crossing is considered to be the primary portal for Gaza's imports and exports. Unfortunately, in recent years its operations have been marred by inefficiency and security threats. As a result, its performance through early 2007 was only a small fraction of that projected by the Access and Movement Agreement (AMA). AMA projected that the crossing should have been able to handle 400 exports per day by the end of 2006, but never averaged more than 70 per day.

Sufa

Sufa, located in the south of the Gaza Strip (east of Rafah City), was used for the imports of construction materials and as a standby for other imports in case of the closure of the Al Montar/Karni crossing. The future of this crossing is uncertain given recent indications from Israel that they intend to abandon the facility.

Karem Abu Salem/Kerem Shalom

The Karem Abu Salem/Kerem Shalom crossing is located in the southeast of the Gaza Strip, 3.6 Km from the Rafah Crossing. Karem Abu Salem/Kerem Shalom is a temporarily being used for movements between Israel and Gaza. The facility is intended for trade between, on the one hand, Egypt, and, on the other hand, Gaza and Israel.

Beit Hanoun/Erez

The Beit Hanoun/Erez crossing is located in the north of the Gaza Strip. It is employed, primarily, for processing movements between Gaza and the West Bank. In addition to cargos, the crossing processes civilians, diplomats, businessmen, international organization staff, laborers, and others in and out of Gaza Strip. The crossing is also used for the imports of cars.

Nahal Oz

Nahal Oz is located east of Gaza City and is used exclusively to facilitate imports of Liquid Fuels and Gas from Israel. The facility consists of storage tanks for petrol and gas on the Palestinian side linked to pipelines from Israel.

Rafah

The Rafah Crossing is located south of Rafah City). It is the only operating border crossing between the Gaza Strip and Egypt. It processes both travelers and cargos. The cargos consist, primarily, of aggregates and food items. Jurisdiction over the border crossing was transferred to the Palestinian Authority in November 2005, after Israel's disengagement from the Gaza Strip.

ANNEX 3: GAZA CROSSINGS TIMELINE

Dec. 2005- May. 2007

Before The Closure

The Al *Montar / Karni* crossing was the main crossing of the Gaza Strip for both imports and exports. An average of 450 truckloads a day used to be imported, and an average of 70 truckloads a day were exported. *Sufa* was used exclusively for the imports of construction materials, with an average of about 160 truckloads, *and the Karem Abu Salem / Kerem Shalom* crossing was used for the crossing of humanitarian aid that comes from or through Egypt with an average of 20 truckloads. The *Beit Hanoun/Erez* crossing was used occasionally for imports of medical supplies.

June 14, 2007- June 18, 2008

Closure Period

Beginning June 14, 2007: the *Al Montar/Karni* crossing was officially closed for both imports and exports. The crossing reopened on June 28, 2007 for limited imports of goods such as wheat and animal feed. Since then, *Sufa and Karem Abu Salem /Kerem Shalom* crossings have also been used, primarily for imports of humanitarian goods, including basic food commodities (e.g. wheat flour, rice, pulses, cooking oil), animal feed and medical equipment. The *Beit Hanoun/ Erez* crossing was used on rare occasions for imports of medical supplies.

Truce or Hudna Period

June 19, 2007- Dec.19, 2008

During the truce or "hudna" period, that started on June 19, 2008 and ended on December 19, 2008, commercial goods were allowed to enter Gaza Strip including aggregates, cement, construction metal, wood, car tires, clothes, shoes, and fruit juice. The quantities of imported goods were very limited. For example during this six month period, only three truckloads of construction metal were imported. As a result, supplies in Gaza continued to dwindle and industrial production to slow. Many firms ceased operations entirely. Many of the others operated sporadically, dependent upon unreliable deliveries of inputs via the tunnels between Gaza and Egypt. Even basic humanitarian goods were in short supply, despite some legal imports and other movements via the tunnels.

Dec. 27, 2008 - Jan. 18, 2009

War Period

The restrictions on trade activities did not change during the 23-day war in Gaza. An average of 90 truckloads a day were imported, about 70% of the imports were humanitarian goods, and 30% were commercial cargos deemed essential to avoid a humanitarian crisis. The Rafah crossing was also used during the war for the import of humanitarian supplies.

Jan. 19 , 2009 - July. 31 , 2010

Post War Period

No improvements were witnessed on the crossings performance, where statistics illustrate that only 49,065 truckloads of commercial goods (mostly food) and humanitarian aid entered into Gaza, as well as the minimal exports of 138 truckloads of cash crops.

ANNEX 9: REFERENCES AND SOURCES

- United Nations Office for the Coordination of Humanitarian Affairs (OCHA)
- United Nation Special Coordinator Office (UNSCO)
- The Borders and Passages General Department
- Agricultural Marketing Cooperatives/Associations
- Wood Industries Union (WIU)
- The Sewing Factory Owners Union (SFOU)
- Informal sources
- The Palestinian General Petroleum Company (PGPC)
- Petroleum & Gas Station Owners Association-Gaza
- Joint Humanitarian Coordination
- Private Sector Coordination Council-Gaza Governorates.
- Palestinian Federation of Industries (PFI)
- The Agricultural Development Association (PARC)
- Palestinian Plastic Industries Union (PPIU)