BULLETIN
MNS September 2009

GUM ARABIC AND GUM RESINS

MARKET NEWS SERVICE (MNS)

QUARTERLY EDITION

International Trade Centre

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Market News Service (MNS)

GUM ARABIC AND GUM RESINS

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Issue 3, September 2009

The Market News Service of the International Trade Centre UNCTAD/WTO (ITC) provides timely and detailed price and market information on selected primary and semi-processed products of particular interest to developing countries and economies in transition. Regular access to such information is vital to companies deciding when and where they should sell or buy products on international markets. MNS thus aims to serve as a market intelligence tool, to enable developing countries realize their full income potential through global trade expansion. MNS does not act as a broker and is exclusively an information service with the objective of improving market transparency and encouraging price and quality competition for the benefit of all market players.

MNS' team of product specialists draws its information from a network of correspondents in many countries worldwide, collecting up-to-date data on wholesale prices paid for specific products, supply and demand trends, and economic, climatic and legislative information that can affect the short-term market situation of particular products. MNS' information providers include major importers, exporters, manufacturers, wholesalers, and governmental organizations. We continuously encourage and welcome new sources of information. Should you be interested in becoming an information provider and contributing to MNS' efforts to improve market transparency and facilitate trade, please contact us at mns@intracen.org.

The information provided in this report was obtained from several sources and relates to various Gum Arabic characteristics, the supply and demand situation of the product, economic and legislative environment as well as the effects of climate change on its global trade.

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I. THE GLOBAL MARKET

The trend which has emerged in the global gum arabic market during the third quarter of 2009 is a move towards lower prices for crude gum exports. In comparison, gum arabic prices in leading producing countries had risen by about 17% in the first two quarters of 2009. Evidently, developed economies, which are currently going through an economic recession, have been overtaken by other sizable markets. The latter, although significantly smaller, have been robust enough to survive the economic crisis. The fact that prices increased at the beginning of the year, in spite of the crisis, demonstrates the utility of the product. It also reveals the strategy some companies in importing and consumer countries are adopting in anticipation of an economic upturn.

The following report will outline the latest developments with regards to the international economic crisis and its effects on gum-producing and gum-importing countries.

Global exports of crude gum and price trends

The export data available for the first quarter of 2009 is derived from COMTRADE aggregate data and data from a few companies in some African gum-producing countries. To date, Sudan, Chad and Nigeria are the major African gum-producing countries. The situation in these three countries, however, differs with respect to prices and amounts of gum exported. Tables 2, 3 and 4 illustrate the amounts of crude gum arabic (expressed in tons and kilograms) exported by the major African gum-producing countries in the first and second quarters of 2009.

The amounts of crude gum arabic exported were more or less constant, increasing only slightly, for all the major countries, compared to the export figures reported for the previous period.

Table 2: Amount of crude gum arabic exported by Sudan in Q1-2009 and Q2-2009 (mirror data)

Importers	Q1-2009		Q2-2009	
	Exported amount	Unit	Exported amount	Unit
'Iceland			20 000	Kilogram
'Turkey			20 000	Kilogram
'Norway	19 200	Kilogram	16 000	Kilogram
'China	14 500	Kilogram	14 500	Kilogram
'Denmark	60	Ton		
'France	3 446	Ton		
'Germany	504	Ton		
'Ireland	45,1	Ton		
'Italy	785,1	Ton		
'Japan	154 600	Kilogram		
'Mexico	5 500	Kilogram		
'Sweden	360	Ton		
'Belgium	60	Ton		
'Brazil	1 000	Kilogram		
United Kingdom	1 121,2	Ton		
'United States of' America	780 400	Kilogram		

Source: ITC calculations based on COMTRADE statistical data

Table 3: Amount of crude gum arabic exported by Chad in Q1-2009 and Q2-2009 (mirror data)

Importers	Q1-2009		Q2-2009	
	Exported amount	Unit	Exported amount	Unit
United States of America	130 000	Kilogram	1 383 321	Kilogram
'China	7 000	Kilogram	8 500	Kilogram
'Turkey			2 000	Kilogram
'France	684,6	Ton	666,6	Ton
'Mexico	4 900	Kilogram		
'Colombia	1 000	Kilogram		

Source: ITC calculations based on COMTRADE statistical data

Table 4: Amount of crude gum arabic exported by Nigeria in Q1-2009 and Q2-2009 (mirror data)

Importers	Q1-2009		Q2-2009	
	Exported amount	Unit	Exported amount	Unit
United States of America	20 000	Kilograms	335 000	Kilogram
'China			40 000	Kilogram
'France	312,1	Tons	265,3	Ton
Germany	150	Tons		

Source: ITC calculations based on COMTRADE statistical data

Prices for gum arabic evolved in the same way as the exported quantities, where the slight decrease observed at the beginning of the year was later followed by a definite increase. Overall, in spite of the global economic crisis, gum arabic prices did not plummet. Tables 5, 6 and 7 lists the importers and also reveals price trends (in US dollars) for the three major African gum producers and exporters.

Given the lack of reliable official statistical data, the following tables present aggregate mirror data obtained from importer countries.

Within this period, Sudan developed trade relations with 16 countries, Chad with six and Nigeria with four.

Table 5: Importers of gum arabic exported by Sudan in Q1-2009 and Q2-2009 (mirror data)

Importers	Q1-2009		Q2-2009		Exported value in Q2-2009, Thousands USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Exported amount	Unit
'Iceland			3,8	USD/Kg	76	20 000	Kilogram
'Turkey			3	USD/Kg	60	20 000	Kilogram
'Norway	4,43	USD/Kg	3,38	USD/Kg	54	16 000	Kilogram
'China	3,72	USD/Kg	3,72	USD/Kg	54	14 500	Kilogram
'Denmark	2 667	USD/T					
'France	1 999	USD/T					
'Germany	2 458	USD/T					
'Ireland	2 483	USD/T					
'Italy	2 442	USD/T					
'Japan	3,06	USD/Kg					
'Mexico	3,82	USD/Kg					
'Sweden	2 561	USD/T					
'Belgium	2 300	USD/T					
'Brazil	3	USD/Kg					
'United Kingdom	2 323	USD/T					
United States of America	1,94	USD/Kg					

Source : ITC calculations based on COMTRADE statistical data

Table 6: Importers of gum arabic exported by Sudan in Q1-2009 and Q2-2009

Importers	Q1-2009		Q2-2009		Exported value in Q2-2009, Thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Exported amounts	Unit
United States of America	3,95	USD/kg	1,83	USD/kg	2 536	1 383 321	Kilograms
'France	1 687	USD/T	2 118	USD/T	1 412	666,6	Tons
'China	4,86	USD/kg	7,65	USD/kg	65	8 500	Kilograms
'Turkey			3,5	USD/kg	7	2 000	Kilograms
'Colombia	4	USD/kg					
'Mexico	5,92	USD/kg					

Source : ITC calculations based on COMTRADE statistical data

Table 7: Importers of gum arabic exported by Nigeria in Q1-2009 and Q2-2009 (mirror data)

Importers	Q1-2009		Q2-2009		Exported value in Q2-2009, Thousands of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Exported amounts	Unit
United States of America	3	USD/kg	2,07	USD/kg	695	335 000	Kilogram
'France	2 544	USD/T	1 888	USD/T	501	265,3	Ton
'China			0,82	USD/kg	33	40 000	Kilogram
Germany	2 700	USD/T					

Source: ITC calculations based on COMTRADE statistical data

According to information obtained from a few exporters, the prices for "hard" gum in the three major African gum-producing countries decreased significantly between June and August. Currently, average prices are USD 2.5/kg in Sudan, USD 2.6/kg in Chad and USD 2.5/kg in Nigeria. For "flaky" gum, prices ranged between USD 1800/T and USD 2000/T at the end of the season.

Table 8: Current prices (in Euro) for gum arabic in Mali

Grade	Price						Unit	Incoterm
	Q1-2009	Q2-2009			2009-Q3			
		April	May	June	July	August		
Number 1	0,84	0,99	1,07	1,22	1,22	1,22	Kg	EXW
Number 2	0,46	0,49	0,53	0,53	0,61	0,61	Kg	EXW

Source: Producers, Harvesters, Exporters, DNCC

The above table presents the prices of the two types of gum arabic in Mali, at the producer level. These prices were obtained from a variety of sources: large-scale producers, major and minor harvesters working with semi-urban centers, exporters and the local organization, Direction Nationale du Commerce et de la Concurrence (National Agency for Trade and Competitiveness). The table reveals that, despite the economic crisis and the resultant isolation of the country, gum arabic prices increased gradually since the beginning of the year only to finally stabilize at the beginning of the third quarter of 2009.

Global imports and price trends

The market situation of importers is presented in the tables below. The major importers (France, the United States, the United Kingdom, Germany, Italy, India, Ireland, Belgium and Japan did not adequately report their data. Nevertheless, the majority of these countries continued to build up their stockpiles of crude gum arabic even though they did not report. The importing markets, though, continued to grow despite the gloominess surrounding the global economic situation.

Imported quantities by some countries, measured at the end of the 2nd quarter of 2009 reached, and even surpassed, the levels obtained for 2008.

Table 9: Suppliers of gum arabic imported by France in Q1-2009, listed by amount imported (T) and by unit value (USD/T)

Exporters	Q1-2009			
	Imported amounts	Unit	Unit value	Unit
'World	5 312,4	Ton	1 968	USD/T
'Belgium	0,5	Ton	6 000	USD/T
'Chad	684,6	Ton	1 687	USD/T
Germany	12,4	Ton	4 194	USD/T
'Greece	0,8	Ton	2 500	USD/T
'Indonesia	5,2	Ton	9 038	USD/T
'Italy	125,8	Ton	1 773	USD/T
'Japan	0,4	Ton	47 500	USD/T
'Mali	100	Ton	1 570	USD/T
'Netherlands	21,6	Ton	3 056	USD/T
'Nigeria	312,1	Ton	2 544	USD/T
'Senegal	477	Ton	1 828	USD/T
'India	22	Ton	909	USD/T
'Singapore	2,6	Ton	2 692	USD/T
Spain	40,2	Ton	896	USD/T
'Sudan	3 446	Ton	1 999	USD/T
'Switzerland	0,8	Ton	5 000	USD/T
'United Kingdom	0,4	Ton	12 500	USD/T
'United Republic of Tanzania	60	Ton	1 800	USD/T

Source: ITC calculations based on EUROSTAT statistical data

Table 10: Suppliers of gum arabic imported by the United States in Q1-2009 and Q2-2009, listed by amount (kg) and by unit value (USD/kg)

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, in thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'World	3,27	USD/kg	2,36	USD/kg	14 039	5 946 011	Kilogram
'France	4,06	USD/kg	3,62	USD/kg	4 755	1 314 609	Kilogram
'Sudan	1,94	USD/kg	1,79	USD/kg	4 746	2 644 243	Kilogram
'Chad	3,95	USD/kg	1,83	USD/kg	2 536	1 383 321	Kilogram
'United Kingdom	4,12	USD/kg	4,92	USD/kg	1 112	226 203	Kilogram
'Nigeria	3	USD/kg	2,07	USD/kg	695	335 000	Kilogram
Germany	4,26	USD/kg	5,08	USD/kg	141	27 750	Kilogram
'Canada	4,08	USD/kg	4,31	USD/kg	30	6 963	Kilogram
'Italy	4,93	USD/kg	2,4	USD/kg	18	7 500	Kilogram
'Netherlands	9,49	USD/kg	14	USD/kg	6	422	Kilogram
'Kenya	12	USD/kg			0		
'India	7,87	USD/kg			0		

Source: ITC calculations based on statistical data from the US CENSUS BUREAU

Table 11: Suppliers of gum arabic imported by the United Kingdom in Q1-2009, listed by amount (T) and by unit value (USD/T)

Exporters	Q1-2009		Imported value in Q2-2009, in thousand of USD	Q2-2009	
	Unit value	Unit		Imported amounts	Unit
'World	2 733	USD/T	4 440	1 624,5	Ton
'Sudan	2 323	USD/T	2 605	1 121,2	Ton
'France	3 519	USD/T	1 293	367,4	Ton
United States of America	5 617	USD/T	323	57,5	Ton
'Belgium	1 621	USD/T	82	50,6	Ton
'India	4 244	USD/T	73	17,2	Ton
Germany	4 824	USD/T	41	8,5	Ton
'Ireland	12 857	USD/T	18	1,4	Ton
Netherlands	7 143	USD/T	5	0,7	Ton

Source: ITC calculations based on EUROSTAT statistical data

Table 12: Suppliers of gum arabic imported by Germany in Q1-2009, listed by amount (T) and by unit value (USD/T)

Exporters	Q1-2009		Imported value in Q1-2009, in thousand of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'World	3 093	USD/T	3 168	1 024,3	Ton
'Sudan	2 458	USD/T	1 239	504	Ton
'France	4 072	USD/T	954	234,3	Ton
'Nigeria	2 700	USD/T	405	150	Ton
'United Kingdom	3 605	USD/T	252	69,9	Ton
'Brazil	4 478	USD/T	163	36,4	Ton
'Japan	9 250	USD/T	74	8	Ton
'Netherlands	4 051	USD/T	32	7,9	Ton
'Italy	3 684	USD/T	28	7,6	Ton
'Switzerland	3 065	USD/T	19	6,2	Ton

Source: ITC calculations based on EUROSTAT statistical data

Table 13: Suppliers of gum arabic imported by Italy in Q1-2009, listed by amount (T) and by unit value (USD/T)

Exporters	Q1-2009		Imported value in Q1-2009, thousand of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'World	2 721	USD/T	3 402	1 250,4	Ton
'Sudan	2 442	USD/T	1 917	785,1	Ton
'France	3 088	USD/T	1 237	400,6	Ton
'United Kingdom	3 777	USD/T	88	23,3	Ton
'Switzerland	5 695	USD/T	86	15,1	Ton
Germany	3 556	USD/T	48	13,5	Ton
'Greece	1 300	USD/T	13	10	Ton
'Belgium	3 000	USD/T	6	2	Ton
United States of America	15 000	USD/T	3	0,2	Ton
'China	4 000	USD/T	2	0,5	Ton

Source: ITC calculations based on EUROSTAT statistical data

Table 14: Suppliers of gum arabic imported by Belgium in Q1-2009, listed by amount (T) and in unit value (USD/T)

Exporters	Q1-2009		Imported value in Q1-2009, thousand of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'World	2 124	USD/Ton	997	469,3	Ton
'France	2 573	USD/T	370	143,8	Ton
Germany	1 407	USD/T	312	221,8	Ton
'Sudan	2 300	USD/T	138	60	Ton
'United Kingdom	10 500	USD/T	84	8	Ton
'India	6 800	USD/T	68	10	Ton
'Mali	611	USD/T	14	22,9	Ton
'Netherlands	4 231	USD/T	11	2,6	Ton
'Luxemburg	10 000	USD/T	1	0,1	Ton

Source: ITC calculations based on EUROSTAT statistical data

Table 15: Suppliers of gum arabic imported by Ireland in Q1-2009, listed by amount (T) and by unit value (USD/T)

Exporters	Q1-2009		Imported value in Q1-2009, thousand of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'World	4 625	USD/T	2 073	448,2	Ton
'United Kingdom	4 837	USD/T	1 262	260,9	Ton
'France	5 883	USD/T	413	70,2	Ton
'Sudan	2 483	USD/T	112	45,1	Ton
'Luxembourg	3 917	USD/T	94	24	Ton
'Italy	5 000	USD/T	90	18	Ton
'Egypt	3 611	USD/T	65	18	Ton
'United States of America	9 000	USD/T	18	2	Ton
'Germany	1 800	USD/T	18	10	Ton

Source: ITC calculations based on EUROSTAT statistical data

Table 16: Suppliers of gum arabic imported by China in Q1-2009 and Q2-2009, listed by amount (kg) and by unit value (USD/kg)

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'World	4,00	USD/kg	4,65	USD/kg	2 753	592 498	Kg
'France	3,70	USD/kg	4,31	USD/kg	1 609	373 294	Kg
'Japan	7,43	USD/kg	14	USD/kg	510	37 100	Kg
United States of America	3,28	USD/kg	4,08	USD/kg	282	69 094	Kg
'United Kingdom	3,78	USD/kg	3,80	USD/kg	181	47 600	Kg
'Chad	4,86	USD/kg	7,65	USD/kg	65	8 500	Kg
'Sudan	3,72	USD/kg	3,72	USD/kg	54	14 500	Kg
'Nigeria			0,82	USD/kg	33	40 000	Kg
Germany	4,40	USD/kg	7,14	USD/kg	15	2 100	Kg
'Chinese Taipei			19	USD/kg	4	210	Kg
'Korea Republic			10	USD/kg	1	100	Kg
'Belgium	6,1	USD/kg			0		

Source: ITC calculations based on statistical data from the General Administration of Customs of the People's Republic of China

Table 17: Suppliers of gum arabic imported by Brazil in Q1-2009, listed by amounts (kg) and by unit value (USD/kg)

Exporters	Q1-2009		Imported value in Q1-2009, thousands of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'World	4,67	USD/kg	1 605	343 763	Kilogram
'France	4,44	USD/kg	1 129	254 300	Kilogram
United States of America	5,43	USD/kg	306	56 360	Kilogram
'United Kingdom	4,95	USD/kg	104	21 000	Kilogram
'Italy	6,38	USD/kg	30	4 700	Kilogram
'Germany	4,40	USD/kg	26	5 903	Kilogram
'Argentina	12	USD/kg	6	500	Kilogram
'Sudan	3	USD/kg	3	1 000	Kilogram

Source: ITC calculations based on statistical data obtained from Scavage, Database of statistical data on External Trade

FACTORS AFFECTING THE GLOBAL MARKET

Climate conditions

Gum arabic production depends significantly on obtaining good pluviometry levels in the plantation zones. In the majority of sahelian countries, the rainy season began slowly but then came in full force in the months of August and September. If these conditions remain the same, one can expect a good harvest of food products and very good conditions for production in gum arabic plantations.

However, it is also to be feared that the pluviometry obtained may also have some negative effects. In fact, since end-August, torrential rains have led to flooding in the sahelian region, particularly in Niger, Senegal, Mali and Burkina Faso. This has led to displacement of local populations, destruction of farmlands and food insecurity.

Pluviometry is equally problematic in Eastern Africa, particularly in Kenya, where predictions for harvest are not good.

Legal aspects

The major event which took place in the legal domain, over the last few months, is undoubtedly the decree of Sudanese president ending government monopoly of the Gum Arabic Company.

Lindsey Partos discusses the government decision in an article entitled, “Sudan scraps gum arabic monopoly to liberalise market”, published in FoodNavigator on 09 June 2009.

According to Leatherhead Food International, Sudan supplies more than two-thirds of the global demand for gum arabic, a global market estimated at USD 210 million. Yet, in its present war-torn context, it is difficult for Sudan to guarantee the trade of this natural resource.

With the collapse of infrastructure throughout the country, confidence on behalf of companies around the world making gum purchases was certainly affected.

A week earlier, a press release by Reuters quoted Mr. Mohammed Ali Dingel, an official of the Sudanese ministry of Agriculture, stating that exports had decreased to about a third of the amount that the country usually produces, namely 30,000 tons.

Large companies, such as Alfred L Woolf, who supply ingredients like gum arabic have adapted to the situation by guaranteeing the stocks and the supply chains of their clients.

Mrs. Anita Benech of the German gum company, Alfred L. Wolff, stated the following to FoodNavigator: “This market has been around for a long time and the people involved in this highly specialised trade already have established channels and sources for the gum. We know what we buy and from where.”

With regards to the high level political and economic decision to dissolve the Gum Arabic Company (GAC), Benech said: “I do not believe that this will change the current state of affairs.”

Major companies who import ingredients and are based in Sudan have created and developed their networks over a period of several years, and in some cases, decades. Another important event likely to impact future gum production is the involvement of the firm, Danone, in the fight against the advance of the desert into the Sahelian region, through “Projet Acacia”. This project is led by NGO, SOS Sahel, in conjunction with managers of companies involved in the gum arabic sector, in order to preserve Acacia—the tree whose sap is one of the ingredients in the yoghurt.

Fans of probiotics who consume Danone’s Activia yoghurt for therapeutic purposes do not yet know that they will soon be indirectly contributing to the improvement of living conditions in the Sahelian region; and even, to a reversal of the observed advancement of the Sahara desert.

Under the initiative of NGO, SOS Sahel, Danone and Colloïdes Naturels International (CNI)—one of the largest wholesalers of acacia gum and one of its suppliers—will contribute generously to a fund whose objective is to finance development projects in gum-producing regions. For each kilogram purchased, Danone and CNI will both make a contribution. The fund is expected to raise 300 000 Euros annually, with two-thirds of the total coming from the agro-alimentary group, Danone.

The project will be piloted in Cameroon, a minor country on the market, but also in Chad, the primary exporter of seyal gum, the gum variety used by Danone.

Global financial crisis

It is undoubtedly too early to evaluate the impact of the global economic crisis on African economies and on exports of agricultural raw materials. However, it is almost certain that Gum Arabic has escaped the consequences of the recession which hit developed economies, consumers of this natural resource.

In fact, since the crisis hit the African continent, it appears to have affected some important segments of the economy but has not generated all the harmful effects that were feared. The continent, then, is on its way to overcoming yet another crisis that it has had to face over the last few years.

However, one has to remain cautious. Because of globalization, the economic well-being of developed and consumer countries will first have to improve. This is a necessary requirement for sustained improvements in the gum arabic sector.

CONCLUSION

Therefore, future perspectives for the development of gum arabic are good. In fact, only 60% of the global demand for gum arabic is met and the sector has witnessed continued investment. Despite a tough global economic situation, gum arabic was not affected that much, compared to other raw materials.

Apparently, in anticipation of improvements in the global economy, some countries are taking advantage of the crisis to obtain their supplies at advantageous conditions. The fact that prices remained high, in general, is a result of a large-scale decline in the production of gum arabic in Sudan. The latter is no longer able to regulate the market and meet an ever-increasing demand.

A renewed interest in “flaky gum” among consumers, where Nigeria and Chad are the major suppliers of the global market, is also driving prices up. This market is now larger than the one for hard gum and the renewed interest is invigorating the gum arabic sector in countries such as Niger and Mali.

Just as with gum arabic, the global market is split with producer countries and African and Asian exporters, on the one hand, and importer and consumer countries on the other. Data for these various products are not readily available because they are not specifically annotated in trade statistical data, except in the case of a few countries.

The United Nations revised its classification system, and implemented it in January 1st 2007. In international trade terms, HS code 13 0190 **Other gums, resins, balsams, natural gums and saps** regroups a variety of sub-codes which represent different products. Unfortunately, these are not always used by the countries concerned.

Gum resin imports and exports are codified under the specific HS codes for certain countries.

China, Saudi Arabia and the United States classify their Oliban, myrrh and “Dragon’s blood” imports under HS code 13019020. Saudi Arabia specifically uses HS code 13019070 for incense and HS code 13019050 for myrrh. India uses HS code 13019031 for myrrh and HS code 13019032 for Oliban and incense.

EU imports are recorded under HS code 130190 which groups together gums, resins, gum-resins, balsams and other natural oleoresins but excludes gum arabic, mastic and gum lacquer. Additional sub-codes appear under this general code for natural gums, resins, gum-resins, balsams, and other natural oleoresins with the exclusion of gum arabic putty and putty from Pistacia lentiscus tree species.

Under the HS code 1301909090, the US classifies other gums, resins, gum-resins but excludes gum arabic, lacquers, balms, karaya and tragacanth.

Karaya and Combretum gum imports and exports are not always coded specifically.

Most certainly, the import and export data collected under this particular code includes products other than gums and resins. Consequently, it is impossible to effectively extract the figures on gum-resins without referring to the general trade statistics of exporter and importer countries, if they exist.

Global exports and price trends

Data on gum resin exports for the first six months of 2009 were available only for Somalia, Ethiopia and Kenya.

These three countries, among others, record their export data information under the code HS 130190 and its sub-divisions without providing much detail. Overall, gum resin exports by these countries have declined, in comparison with export levels recorded at the same time in 2008. The same downward trend is evident, to some extent, among reported unit values.

During this recession period, gum resins are predominantly headed towards China, and to a lesser extent, towards France and the United States.

The following tables outline the situation in Q1-2009 and Q2- 2009 for gum resins exported from African producer countries. The tables also reveal the current prices for key resins collected from some exporters and other agents involved in the industry.

Table 18: Importers of resins exported by Somalia in Q1-2009 and Q2-2009 (mirror data)

Products: HS 130190 Other gums, resins, balsams, saps and natural resins

Importers	Q1-2009		Q2-2009		Exported value in Q2-2009, thousands of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Exported amounts	Unit
'United States of America			3,4	USD/kg	17	5 000	Kg
'China			0,96	USD/kg	5	5 200	Kg
'France	2 516	USD/T					
'Germany	4 755	USD/T					
'Spain	4 500	USD/T					
'Turkey	2,67	USD/kg					

Source: ITC calculations based on COMTRADE statistical data

Table 19: Importers of resins exported by Ethiopia in Q1-2009 and Q2-2009 (mirror data)

Products: HS 13019000 Lacquers, natural gums, resins, gum resins, balsams and other natural oleresins (excluding gum arabic)

Importers	Q1-2009		Q2-2009		Exported value in Q2-2009, thousands of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Exported amounts	Unit
'China	2,3	USD/kg	2,17	USD/kg	488	225 008	Kg
United States of America			3,75	USD/kg	15	4 000	Kg
'Brazil	2,74	USD/kg					
'Germany	3 277	USD/T					
'Greece	3 475	USD/T					
'Netherlands	3 333	USD/T					

Source: ITC calculations based on COMTRADE statistical data

Table 20: Importers of resins exported by Kenya in Q1-2009 and Q2-2009 (mirror data)

Products: HS 13019000 Lacquers, natural gums, resins, gum resins, balsams and other natural oleoresins (excluding gum arabic)

Importers	Q1-2009		Q2-2009		Exported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Exported amounts	Unit
'China	1,34	USD/kg	1,15	USD/kg	69	60 000	Kilograms
'France	5 195	USD/T	3 714	USD/T	52	14	Tons
'Germany	3 591	USD/T					
'Mexico	2,5	USD/kg					
'Colombia	4,11	USD/kg					

Source: ITC calculations based on COMTRADE statistical data

Table 21: Current prices (in USD) of the main resins in Somalia, Ethiopia and Kenya

Origin	Grade	Unit Price	Incoterm
Somalia	Somalia Frankincense (Boswelia carteri)	4 USD/Kg	FOB
	Somalia Frankincense (Boswelia frereana)	6 USD/Kg	FOB
Ethiopia	Myrrh	900 USD/T	FOB/Djibouti
	Ethiopian Gum Olibanum (Grade 1)	2100 USD/T	FOB/Djibouti
	Ethiopian Gum Olibanum (Grade 2)	1500 USD/T	FOB/Djibouti
	Ethiopian Gum Olibanum (Grade 3)	1200 USD/T	FOB/Djibouti
Kenya	Myrrh	5,2 USD/Kg	FOB/Mombasa
	Black Frankincense	2,3 USD/Kg	FOB

Source: Exporters, Wholesalers

Global imports and price trends

The following tables list the suppliers for a few countries for which import data was available at the end of the second trimester 2009.

Oliban and myrrh are only quoted in Chinese import data although the exact quantity for each product is not listed specifically.

The data illustrated in these tables show that imported resin quantities declined, in comparison to the previous period—except for China and the United Kingdom. Unit values did not changed much overall, although for some countries, a significant decrease in unit values was observed.

Table 22: Unit values for resins imported by France in Q1-2009 and Q2-2009

Products: HS 13019000 Natural Gums, Resins, Gum-Resins, Balsams and Other Natural Oleoresins (excl. Gum Arabic)

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'Senegal	3 167	USD/T	3 883	USD/T	400	103	Ton
'Yemen	3 515	USD/T	4 157	USD/T	69	16,6	Ton
'Kenya	5 195	USD/T	3 714	USD/T	52	14	Ton
'Niger			1 273	USD/T	28	22	Ton
'Burkina Faso			20 000	USD/T	2	0,1	Ton
'China	8 462	USD/T		USD/T	0	0	Ton
'Somalia	2 516	USD/T			0		

Source: ITC calculations based on EUROSTAT statistical data

Table 23: Unit values for resins imported by Germany in Q1-2009

Products: HS 13019000 Natural Gums, Resins, Gum-Resins, Balsams and Other Natural Oleoresins (excl. Gum Arabic)

Exporters	Q1-2009		Imported value in Q1-2009, thousand of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'Ethiopia	3 277	USD/T	213	65	Ton
'Yemen	5 876	USD/T	161	27,4	Ton
'Indonesia	1 010	USD/T	157	155,4	Ton
'Thailand	5 271	USD/T	107	20,3	Ton
'Kenya	3 591	USD/T	93	25,9	Ton
'Somalia	4 755	USD/T	68	14,3	Ton
'Sudan	2 750	USD/T	44	16	Ton

Source: ITC calculations based on EUROSTAT statistical data

Table 24: Unit values for resins imported by the United States in Q1-2009 and Q2-2009

Products: HS 1301909190 Other Natural Gums, Resins and Gum Resins, NESOI

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'India	1,86	USD/kg	1,67	USD/kg	1 268	760 623	Kilogram
'China	5,88	USD/kg	7,67	USD/kg	273	35 600	Kilogram
'Hong-Kong	4,46	USD/kg	4,5	USD/kg	54	12 000	Kilogram
'Pakistan			12	USD/kg	25	2 149	Kilogram
'Somalia			3,4	USD/kg	17	5 000	Kilogram
'Ethiopia			3,75	USD/kg	15	4 000	Kilogram
'Indonesia	1,53	USD/kg	3	USD/kg	6	2 000	Kilogram
'Jordan			2,86	USD/kg	6	2 100	Kilogram
'Chinese Taipei (Taiwan)			125	USD/kg	3	24	Kilogram
'Japan	11	USD/kg	8,33	USD/kg	3	360	Kilogram

Source: ITC calculations based on US Census Bureau statistical data

Table 25: Unit values for resins imported by Switzerland in Q1-2009 and Q2-2009

Products: HS 13019080 Gums, resins, gum resins and natural oleoresins (except gum arabic and balsams)

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'World	9,37	USD/kg	8,95	USD/kg	320	35 747	Kilogram
'France	8,07	USD/kg	8,17	USD/kg	164	20 081	Kilogram
'Germany	21	USD/kg	18	USD/kg	65	3 596	Kilogram
'United States of America			3,90	USD/kg	39	10 004	Kilogram
'United Kingdom			50	USD/kg	15	300	Kilogram
'Thailand			8	USD/kg	8	1 000	Kilogram
'Netherlands			875	USD/kg	7	8	Kilogram
'Spain	30	USD/kg	35	USD/kg	7	200	Kilogram
'Austria	8,33	USD/kg	33	USD/kg	5	150	Kilogram
'India	4,05	USD/kg	18	USD/kg	4	219	Kilogram
'Chinese Taipei (Taiwan)	57	USD/kg	46	USD/kg	3	65	Kilogram
'Hungary			40	USD/kg	1	25	Kilogram
'Italy	11	USD/kg	10	USD/kg	1	99	Kilogram

Source: Calculs du CCI sur la base des statistiques de l'Administration fédérale des douanes (AFD) de Suisse

Table 26: Unit values for gum resins imported by Thailand in Q1-2009 and Q2-2009

Products: HS 13019090090 Lacquers; natural gums, resins, gum resins and oleoresins (for example, balsams); Other

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'World	1,20	USD/kg	4,79	USD/kg	40	8 346	Kilogram
'Japan	2,01	USD/kg	8,92	USD/kg	35	3 925	Kilogram
'Chinese Taipei (Taiwan)			1,27	USD/kg	2	1 581	Kilogram
'Myanmar			0,70	USD/kg	2	2 840	Kilogram
'China	1,09	USD/kg			0		

Source: ITC calculations based on statistical data from the customs department of the Kingdom of Thailand

Table 27: Unit values for resins imported by China in Q1-2009 and Q2-2009

Products: HS 13019020 Olibanum, myrrh and dragon's blood

Exporters	Q1-2009		Q2-2009		Imported value in Q2-2009, thousand of USD	Q2-2009	
	Unit value	Unit	Unit value	Unit		Imported amounts	Unit
'World	4,70	USD/kg	3,57	USD/kg	1 054	295 268	Kilogram
'Ethiopia	2,3	USD/kg	2,17	USD/kg	488	225 008	Kilogram
'Indonesia	109	USD/kg	114	USD/kg	285	2 500	Kilogram
'Singapore	110	USD/kg	103	USD/kg	206	2 000	Kilogram
'Kenya	1,34	USD/kg	1,15	USD/kg	69	60 000	Kilogram
'Somalia			0,96	USD/kg	5	5 200	Kilogram
'Netherlands			3,57	USD/kg	2	560	Kilogram

Source: ITC calculations based on statistical data from the General Administration of Customs of the People's Republic of China

Table 28: Unit values for resins imported by the United Kingdom in Q1-2009

Products: HS 13019000 Natural Gums, Resins, Gum-Resins, Balsams and Other Natural Oleoresins (excl. Gum Arabic)

Exporters	Q1-2009		Imported value in Q1-2009, thousand of USD	Q1-2009	
	Unit value	Unit		Imported amounts	Unit
'World	3 435	USD/T	910	264,9	Ton
'Germany	10 720	USD/T	253	23,6	Ton
'India	2 925	USD/T	248	84,8	Ton
Spain	1 527	USD/T	124	81,2	Ton
'United States of America	8 416	USD/T	85	10,1	Ton
'France	5 467	USD/T	82	15	Ton
'Brazil	1 964	USD/T	33	16,8	Ton
'Netherlands	1 835	USD/T	29	15,8	Ton
'Indonesia	1 667	USD/T	25	15	Ton
'Singapore	10 000	USD/T	10	1	Ton
'Denmark	20 000	USD/T	6	0,3	Ton
'Canada	40 000	USD/T	4	0,1	Ton
'Italy	7 500	USD/T	3	0,4	Ton
'Turkey	1 667	USD/T	1	0,6	Ton
'Belgium	10 000	USD/T	1	0,1	Ton

Source: ITC calculations based on EUROSTAT statistical data

Among other factors, the effects of climate change (such as desertification, drought, the degradation of plant resources, etc) can affect the production and trade of gum resins.

A major factor with negative implications remains the continued conflicts between ethnic groups and the wars raging in the eastern part of Africa, a region in which almost all the gum resins destined for exportation is located.

Gum resins could also suffer from their own success. As a matter of fact, high speculation on certain market segments could lead to an excessive increase in prices, although production would lag behind due to low capacity. The outcome of such a situation would be a substitution of gum resins with more affordable synthetic products which, once adopted, would be hard to compete with.

The economic crisis had a minimal effect on the trade of gum resins, possibly as a result of the fact that their utilization does not require any processing. Synthetic products, on the other hand, have suffered from the effects of the economic crisis affecting importer countries.

CONCLUSION

Gum Resins

Gum resins, just like gum arabic, withstood the economic crisis. The overall price trend was clearly stable, although some minor price decreases were observed. The amount of gum resins imported by some countries like China and the United States increased, in relation to the beginning of the year.

It is a generally accepted fact that trouble on the gum resins market is very rare and unlikely to occur even in the next 10 years, unless some innovations and events modify current consumption patterns. The primary threat for gum resins could arise from the destruction of ecosystems and the loss of biodiversity in production zones, a result of both climate change effects and human activity.

This situation should motivate all those working for the development of these products, which have an immeasurable value on the cultural, spiritual and therapeutic levels.

This period of crisis is an opportunity to reflect on innovative projects to address the preservation of gun resins, increasing their utilisation as well as supporting their production—an essential requirement for the expansion of trade.

FAIRS AND EXHIBITIONS

These events are a meeting point for the main economic players involved in the gum arabic sector. Gum Arabic's applications in the food industry are usually greater than its pharmaceutical or technical applications.

	Month	Date	Exhibition	Location
2009	**September**	09 – 11	**Food Ingredients Asia**	Bangkok, Thailand
	October	14 – 16	**Health Ingredients Japan 2009**	Tokyo, Japan
		23 – 24	**Food Ingredients India 2009**	Mumbai, India
	November	17 – 19	**Food Ingredients Europe 2009**	Frankfurt, Germany
			Natural Ingredients, Europe 2009	

I. APPENDIX

List of Abbreviations

ITC: International Trade Centre
FAO: Food and Agriculture Organization
FDA: Food and Drug Administration
IMF: International Monetary Fund
GRAS: Generally Recognized As Safe
JECFA: Joint FAO/WHO Expert Committee on Food Additives
Kg: Kilogram
N.A: Not Available
NES / NESOI: Not Elsewhere Specified / Not Elsewhere Specified Or Included
USD/T: Dollar of the United States of America per Ton
USD/Kg: Dollar of the United States of America per Kilogram
Q1: First quarter
Q2: Second quarter
Q3: Third quarter
Q4: Fourth quarter
T: Ton
WHO: World Health Organization

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- **Food Navigator**: http://www.foodnavigator-usa.com);
- **Nutra Ingredients:** http://www.nutraingredients.com).

II. APPENDIX

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GARA, Gums and Resins Association of Kenya, an organisation registered under the societies Act in 1997. The association joins together public, private partners as well as civil society organisations.

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- **NGARA publications, 5th edition**, march 2006 ;
- **FAO – Harvesting of non-wood forest products**, 2003, pp 432;
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