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# **MARKETING AND COMMUNICATIONS PLAN FOR POMEGRANATE PRODUCERS THROUGH JORDAN EXPORTERS AND PRODUCERS ASSOCIATION (JEPA) FOR FRUITS AND VEGETABLES**

Final Report

March 24, 2010

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VEGETABLES  
FINAL REPORT**

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## 1.0 EXECUTIVE SUMMARY

The primary objective of this marketing and communication plan is to provide the Jordan Exporters and Producers Association for Fruit and Vegetables (JEPA) with insight and direction to the marketing and communication planned activities that the association can carry out in order to assist in marketing the pomegranate sector in Jordan.

The plan starts out by examining the internal strengths and weaknesses of the marketing and communication environment within JEPA by assessing the present marketing and communication activities, resources, and practices that have been carried out by JEPA to promote the pomegranate sector in Jordan. Then the plan provides an overview of the global as well as domestic market characteristics, dynamics and trends of the pomegranate market, providing an overview of the major trends of production and consumption of pomegranate in Jordan as well as worldwide to identify and grasp the market opportunities and challenges for the Jordanian pomegranate sector. Finally, the this plan concludes with a concise marketing and communication strategy and an action plan listing the activities and resources needed for implementation within a stipulated timeframe. The main projected marketing and communication objectives are summarized in the following table:

Marketing Objectives	Communication Objectives
<b>Product:</b> <ul style="list-style-type: none"><li>1. Supporting farmers and producer in determining pomegranate variety mix production priorities</li><li>2. Guiding farmers on the optimal periods for the production and export of Jordanian pomegranate.</li><li>3. Enhancing the quality of Jordanian pomegranate produce.</li></ul>	<ul style="list-style-type: none"><li>1. Enhance communications within JEPA including the Board of Directors and staff;</li><li>2. Establish mechanisms to support communications;</li><li>3. Increase public understanding of the pomegranate sector and its potentials;</li><li>4. Establish mechanisms for stakeholders to access information from and about JEPA.</li></ul>
<b>Promotion:</b> <ul style="list-style-type: none"><li>1. Enhancing the promotion of Jordanian pomegranate through (1) organizing an annual pomegranate festival in Amman and (2) supporting farmers in attending the main international fruit and vegetables exhibitions and fairs</li><li>2. Setting an integrated marketing communications framework for JEPA to use in communicating the brand of Jordanian pomegranate (provided in the communication plan).</li></ul>	
<b>Distribution:</b> <ul style="list-style-type: none"><li>1. Organizing an Annual Pomegranate Festival in Amman and the major cities of Jordan.</li><li>2. Improving the distribution efficiency to the fruit and vegetables grocery stores and supermarkets in Amman and the major cities in Jordan.</li><li>3. Enhancing the side-road outlets of Jordanian pomegranate.</li><li>4. Assisting farmers and producers in distributing to the export market through establishing and maintaining relationships with importers and distributors in the main export markets.</li></ul>	

## 2.0 SITUATION ANALYSIS

### 2.1 INTRODUCTION

Jordan Exporters and Producers Association for Fruit and Vegetables (JEPA) is a non-profit organization, established in March 1994 by a group of private exporters and producers in the horticultural<sup>1</sup> sector to improve and develop quality and quantity of horticultural exportable produce of fresh fruit and vegetables in Jordan.

USAID Jordan Economic Development Program (SABEQ) has done extensive work in the field of identifying high value crops for high value markets, and 'low water demanding.'

Pomegranate was identified as one of those targeted crops in Jordan, and work on this crop is part of SABEQ's Regional Investment initiative. This is why having the appropriate Marketing and Communications Plan for the pomegranate sector is one of the major success factors for JEPA with regards to achieving set targets and actively contributing to the economic development of both producers and the region.

Pomegranate producers among other agricultural enterprises need a more systematic approach to organizing marketing activities. Such an approach would enable them to; a) identify new market opportunities, b) improve their market selection and positioning strategies, c) obtain early warning of competitors' directions, d) achieve better customer interaction, as well as e) minimize investment risks.

This plan will create a model for JEPA, allowing repeatable analysis and planning processes for future growth and product development. Implementation of the plan will expand the member base and lead to sustainable success. Furthermore, this plan supports and complements JEPA's promotional objectives, and takes an additional step towards addressing the broader communications needs of JEPA and the pomegranate sector.

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<sup>1</sup> **Horticulture** is the industry and science of plant cultivation including the process of preparing soil for the planting of seeds, tubers, or cuttings. Horticulturists work and conduct research in the disciplines of plant propagation and cultivation, crop production, plant breeding and genetic engineering, plant biochemistry, and plant physiology. The work particularly involves fruits, berries, nuts, vegetables, flowers, trees, shrubs, and turf. Horticulturists work to improve crop yield, quality, nutritional value, and resistance to insects, diseases, and environmental stresses.

The key outcomes of the Marketing and Communications Plan include:

- Identified key pomegranate local and global market trends.
- Identified Jordanian pomegranate farmers marketing and technical needs to enhance the marketability and added value of their pomegranate production.
- Addressed marketing concerns and provided a strategic direction to enhance the marketing of the Jordanian pomegranate produce through JEPA.
- Identified marketing and communication objectives, messages, audiences, approaches and activities, resource requirements (staff, skills, and financial), and plan of action;
- Enhanced internal and external communications;
- Improved capacity of JEPA to respond in a timely manner to members of the Association, Pomegranate sector, international buyers, and media queries regarding the horticultural sector;
- Increased stakeholder, partner and donor information sharing and exchange;
- Enhanced relations with media channels specifically mainstream newspapers in Jordan to promote Jordanian horticultural and pomegranate sectors;
- Increased internal feedback for advising JEPA decision makers with regards to perceptions of the public and suggestions for remedial actions.

The analysis and recommendations in this document are based on a marketing and communications needs assessment, which included a review of relevant publications and communications tools of JEPA. The processes included extensive web research, review of JEPA's website, background documents, press coverage, as well as interviews with a range of people. Interview respondents and resource persons included members of JEPA Board, the National Center for Agricultural Research and Extension (NCARE), Pomegranate producers, JEPA staff, in addition to media representatives and sellers of fruits and vegetables at the major grocery stores and supermarkets in Amman.

This marketing and communications Plan does not only focus on the communications needs of JEPA, but also includes a separate section on specific needs of pomegranate producers and puts forward proposed plans for their work.

## **2.2 BACKGROUND ON THE POMEGRANATE FRUIT**

Pomegranate is a high value crop and its entire tree is of great economic importance. Apart from its demand for fresh fruits and juice, the processed products like ice cream, wine, shakes and candy are also gaining importance in world trade. All parts of pomegranate tree have great therapeutic value and are used in leather and dying industry. Pomegranate juice is easily digestible and contains about 15 percent invert sugar. Pomegranate is a rich source of sodium and also contains a good amount of riboflavin, thiamin, niacin, Vitamin C, calcium and phosphorous. Protein and fat contents are negligible.

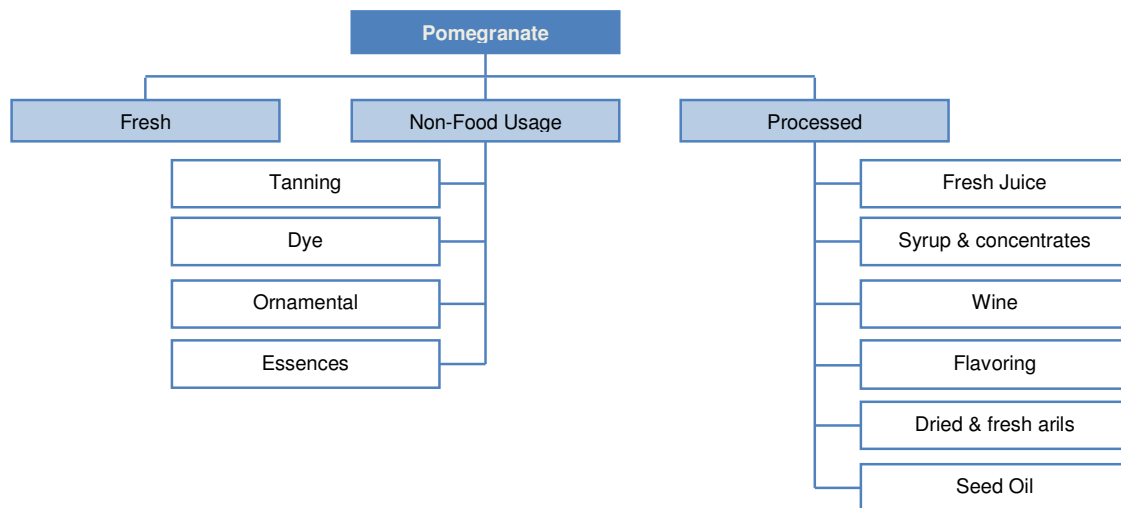
Pomegranates grow best in dry areas with hot summers and cold winters. There are many varieties of pomegranate, but from a retail (consumer) perspective, there are two main types, classified by color: purple or red, and yellow. The latter is most often used to make juices. Sizes can vary greatly, and quality is determined by an unblemished skin, color, size, weight, and taste (sweetness or sourness).

Global production is mainly centred in the Mediterranean and Middle Eastern regions. Pomegranates are grown also in similar climates in the USA, South America and Australia. Because of a history of anecdotal health benefits, a lot of research is currently being undertaken worldwide to better understand the nutritional benefits of pomegranates.

Very little is published on the production of pomegranates, whether in Jordan or globally. Documentation of the tree costs of production, returns per water (ML), and yields, is quite variable and at best not very accurate. The actual market size and real return is unknown, other than to say that it could be quite significant considering the way the market has grown and is continuing to grow around the world. Being a seasonal fruit, despite its ability to be stored, there is a counter seasonal opportunity for exporters.

Pomegranates have many varied uses. The primary uses are: fresh fruit, fresh juice, concentrated juice, arils, products such as tea, pharmaceutical and medicinal uses, dyes and decoration.





Pomegranates, both fresh and derivatives, are increasing in popularity among consumers worldwide. There are many items, both food and non-food, that can be produced with pomegranates or parts of pomegranates. The demand for pomegranate juice and flavoring is exploding and there is a large and growing market for concentrate worldwide.

In addition, the pomegranate remnants can be utilized to feed livestock, and the remnants of pruning can be used to propagate seedlings, for heating tools, and to manufacture simple tools.

The health, nutritional, and manufacturing significance of pomegranate has been viewed through the increasing global demand for pomegranates, especially in the EU, USA and Canada. The pomegranate tree renders itself crucial due to numerous reasons. Firstly, the tree is abundant in terms of production and is adaptable to environmental and harsh climatic conditions that may not be suitable for other trees. Secondly, the tree lives on minimal water quantities compared to other citrus fruit trees. In addition, it is easy to grow and enters early into the production stage. Finally, the tree has a long production life, and its fruit is sold at high prices locally and globally.

## 2.3 BACKGROUND ON JEPA

This section outlines the current situation facing JEPA with regards to marketing and marketing communications. First, it discusses the institutional capacity, internal communications, and channels of communications, coordination issues, as well as available resources. Secondly, it highlights a broad range of issues in the environment driving the marketing and communications plan.

### **2.3.1 Association Background**

The Jordan Exporters and Producers Association for Fruit and Vegetables (JEPA) was established in March 1994 as a non-profit organization, by a group of private exporters and producers in the horticultural sector. The association seeks to promote quality exports of fresh fruits and vegetables as well as cut flowers from Jordan and is keen to orient its activities and its member's activities toward international practices and standards work.

Nowadays, JEPA members include agricultural and food industry members. The association currently provides a variety of services to its members such organizing seminars and training, conducting demonstrations of post-harvest technologies, marketing trips, and trial shipments, promoting agricultural trade within the regional and foreign countries and participating in trade fairs, cooperating with governmental bodies and monitoring quality and quantity of produce exported.

The association has several stakeholders and has developed good relations with them including the Ministry of Agriculture, the National Center for Agricultural Research and Extension (NCARE), Jordan Enterprise Development Corporation (JEDCO) and many other governmental and pseudo-governmental organizations.

In addition, JEPA enjoys good relationship with donors such as Business and Export Development Program for Jordanian Enterprises (TATWEER), USAID Jordan Economic Development Program (SABEQ) and others<sup>2</sup>.

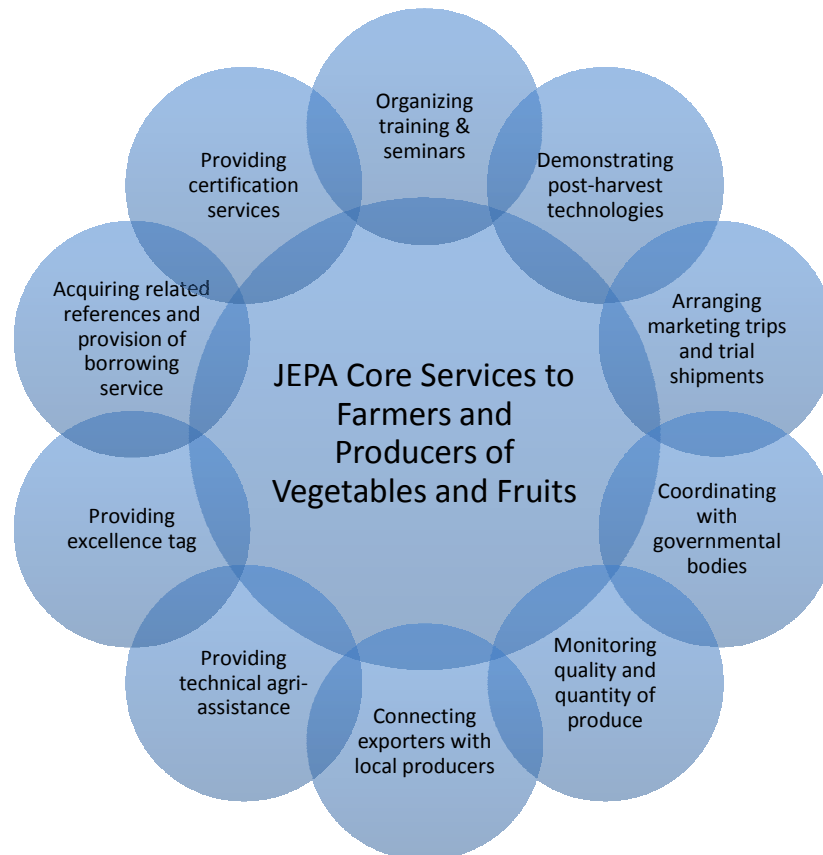
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<sup>2</sup> Source: JEPA Strategic Plan (2008 – 2010)

## 2.4 JEPA MARKETING AND COMMUNICATION ASSESSMENT

### 2.4.1 Assessment of Marketing-related Services

According to JEPA's strategic plan, the following graph overviews JEPA's main marketing-related services and the follows is a quick assessment of those services:



1. The association provides a variety of services such as training programs, workshop, seminars and so on with minimum fees to help members to develop their works and apply international standards in the field of agriculture. The training is considered the second important service that the association provides; consequently continue providing this service is essential. JEPA must establish yearly training plan and announce it at the beginning of each year taking into account the needs of its members.

2. JEPA has no systematic way of informing members about the development of new services. Therefore, JEPA must develop its communication plan taking into consideration the use of best way to communicate with its members.
3. The facilitation for members to work with international markets is the top priority for JEPA's members. JEPA must explore opportunities at the export markets and disseminate the results to all members in order to connect importers in international markets with both the producers and exporters.
4. The participation in trade fairs is considered also a priority for JEPA's members, it is of paramount importance to continue organizing the participation of its members in international trade fairs and start planning to organize a local periodic fair. This local fair will be one of the income sources for JEPA.
5. The information provided to the members is considered one of its important services, survey has showed that members are not totally satisfied with this service. JEPA must provide better information related to the global markets opportunities, prices and standards of export markets, packaging, new products' markets, certification and other information.
6. The organization of discovery groups is another way of facilitating the exports of JEPA's members and is considered a direct way of connecting the importers in international markets with both the producers and exporters. On the other hand, the organization of purchasing groups will have the same effect on exporters and producers and would be less costly than trade or discovery missions.
7. Connecting exporters with local producers will be beneficial for both parties.  
JEPA must also develop good relations with producers through field visits to local producers and assist them in promoting their products locally and internationally.
8. JEPA provides limited technical assistance to its members, as it does not have the expertise and sufficient qualified employees for this purpose. The survey has showed that this service is very essential and is demanded by almost all of its members. JEPA can subcontract this service with qualified consultants or consulting companies and can at the same time continue train its employees to provide these services.
9. Some markets have developed their own quality marks for such as the British Retail Consortium (BRC), JEPA could benefit from this experience that develop an excellence mark to be provided upon the satisfaction of developed requirements and standards. JEPA could cooperate with the Jordan Institute for Standards and Meteorology (JISM) as well with King Abdullah Center for Excellence (KACE). On the other hand, JEPA could cooperate with Accreditation Bodies to issue certificates on their behalf.

### **2.4.2 Institutional Setup**

The Administration and Promotion Unit at JEPA is currently responsible for all marketing communication and promotional activities. The Unit includes two staff members with no practical experience in the field of marketing communications or media relations management. They are currently responsible of handling issues related to membership, arrangement of meetings and field trips to international buyers, in addition to announcements of any events/exhibitions. They are also responsible for informing members about any international and or regional exhibitions of potential interest via mobile text messaging. On another note, there is one staff member in the Research and Studies Department who is responsible for managing the content, information, and up-to-date uploads of studies and reports on the JEPA website.

It is worth noting that, JEPA's media activities are limited to providing intermittent coverage of formal annual exhibitions, and dignitary visits organized and conducted through JEPA. Media feeds are not collected nor reported. The JEPA website includes a Press Office section, which regrettably does not include an archive of news items or press releases issued by the Association. The 'News Search' is limited to (3) most recently published news items available in Arabic only limiting readership and therefore outreach to wider potential audience.

Another finding of this study is related to the branding of JEPA. It seems that the Association is not well branded through the media. Media activities are conducted in a rather sporadic manner lacking sustainability in planning and implementation. Moreover, another weakness with regards to communications is attributed to the lack of designation of an official spokesperson of JEPA. Usually, media statements are made in response to a media request, and currently are being handled by the Board of Directors based on technical experience versus expertise in public relations and communications. In conclusion, JEPA's media activities can be described as reactive to a great extent, while lacking focus on key messages conveying the organization's vision, mission, and objectives.

### **2.4.3 Internal Communications**

Internal communications within JEPA is divided into two categories: work related orders/directions, and information.

Most of the work-related communications is channeled through official letters, memos, and face-to-face interaction with senior management. A brief assessment confirmed that these types of communications are indeed of high quality. This is reflected threefold: a) junior staff has a good understanding of their function and job requirement; b) senior staff is generally satisfied with the implementation of instructions given by them, c) senior staff seems to enjoy a considerable degree of control over and leadership in administrative issues within JEPA.

In contrast to internal (staff) communication, communications with current and potential members' falls below expectations as it is to the most part purely informative and generally limited to correspondences via emails, faxes, and most recently mobile SMS messages. In that regard it is worth mentioning that, they complain that there are not enough meetings with JEPA Board of Directors (BoD). The staff believes that (BoD) meetings are important as they provide an important venue for delivering messages, engaging in discussions, and getting feedback. Furthermore, a number of members complained about not receiving announcements for international participations nor visits of delegation in time. In a way this complaint reflects a concern about a degree of lack of transparency within the organization.

When looking at pomegranate producers in specific, it became apparent that they consider the National Center for Agricultural Research and Extension (NCARE) the main source of information on pomegranate farming, water and irrigation, pricing, and marketing.

In addition, relevant entities working with Pomegranate production work in isolation from one another. These are the Ministry of Agriculture (MoA), the (NCARE), and JEPA. The flow of information between those three entities is found to be rather poor. Having that said and given the absence of official communications channels across relevant stakeholders the only way information can spread is through informal channels/ways. This haphazard, uncontrolled and undirected flow of information effectively affects the promotion of pomegranate. In fact, the lack of structure in communications does not allow for the proper promotion of the pomegranate sector; for it is not able to address the promotion of nutritional value and benefits of the produce, nor does it address the needs of national or international markets.

This sporadic approach also fails to spread and educate on best practices for growing and storing pomegranate, pricing, or export techniques relevant.

When farmers and pomegranate producers were asked about ways to improve flow of information, they requested a) more informative mobile SMS messages, b) leaflets to be disseminated among farmers through the (NCARE), c) intensive field training, seminars and workshops, in addition to d) regular meetings with relevant officials for discussing future policies steering the development of this sector. Moreover, farmers and pomegranate producers proposed the formation of regional committees participating in the planning and promotion of the pomegranate sector within Jordan and internationally.

#### **2.4.4 Communication Channels**

Communication between JEPA and its targeted (250) members takes place mainly through official letters, memos, faxes, and emails. However, there are no clear channels of communications with relevant entities namely the (MOA), the (NCARE), and pomegranate producers.

"We are in the process of establishing and registering an NGO (association) for pomegranate producers as there is no official entity organizing this matter" said one pomegranate farmer.

The JEPA website is considered a communications channel with information on JEPA, market potentials, and most recent researches and studies. However, pomegranate producers and farmers complained that they do not have access to internet because of technology limitations in their areas, as well as their computer illiteracy. The farmers expressed their need to more user friendly channels and tools of communications guaranteeing delivery of required information to their end in a timely and efficient manner.

#### **2.4.5 Communication Tools**

There are no branding guidelines to manage the development of JEPA publications. Publications produced so far are conventional, and provide general information on JEPA's vision, mission, objectives and ongoing projects.

One major publication of JEPA is the newsletter produced and published on the website in Arabic only. The publication is rich in content and relevant information to targeted audiences,

however, the layout design and presentation of information is not user friendly, and requires further work. Branding, content display, and final production also need further attention and development.

Moreover, the website provides an effective tool for communications and information. However, it requires further technical and creative upgrading to fulfill the needs of different groups/tiers targeted to include: JEPA members, pomegranate farmers and producers, relevant governmental entities, investors, international community, the media, and the general public. Furthermore, JEPA needs to further develop its electronic services. Suggestions for improvement include e-commerce, virtual exhibition interface, Fruit and Vegetables Atlas, in addition to providing access to information to the general public, and not only restrict it to JEPA's members.

As a deduction, JEPA has a number of publications (online/print). An observation regarding the identity of the Association is still modest. There are few procedures and systems for communications, and opportunities are responded to on an ad hoc basis without strategic direction or plan. Further, JEPA's publications are simple and generic. There is a need to produce more informative materials (i.e. annual reports, updated agricultural information, success stories, and product of the month). Furthermore, there is a need to produce promotional materials for attracting new members, leveraging and sponsorship opportunities.

#### **2.4.6 Events and Exhibitions**

Currently, JEPA participates in some important international exhibitions; nevertheless there still remains much room for increased participation. The reason for this limited participation being the reliance of most of JEPA's members on external funding and sponsorship for representation and participation in such international conventions. On another note, it has been noted that the physical representation of JEPA in such events falls below standards in terms of the quality of exhibition stands and materials.

"I wish we can have appropriate representation in international exhibitions by having access to attractive space and booth for presentation" said the Administration and Promotion staff at JEPA.

JEPA should further promote such international participation across current members, and relevant entities for maximum participation, exposure and networking. In addition, JEPA



should develop a leveraging and sponsorship scheme to package its participation in a professional and attractive way based on international standards.

Further, a number of interviewees expressed their frustration of the lack of organization of relevant events to promote pomegranate, and that efforts are restricted to conventional exhibitions, and conventional ways of marketing and promotion covering only certain regions of the Kingdom.

## **2.4.7 Issue Environment**

### ***2.4.7.1 Awareness and perceptions of JEPA***

#### **JEPA Community**

Current members of JEPA understand the objectives, and achievements of the Association, however, pomegranate farmers/producers know very little about JEPA: there have been no meetings or awareness workshops introducing JEPA, its objectives, ongoing projects, and achievements. An interviewee from the pomegranate producers noted that he is not aware of JEPA as a source of information on pomegranate farming.

Furthermore, a minority of the interviewees could explain what JEPA is and among that little consensus was found on their understanding. In addition, conversations with JEPA Board of Directors (BoD) revealed high degrees of misconception regarding the quality of pomegranate farming and the ability of Jordan to compete internationally with its produce. On another note, representatives from (NCARE) believe that the pomegranate production is on the right path. They want to see it succeed. They also believe that the plans put forth by donors namely SABEQ constitute a good start, but there is a need for more funding to put strategies in place for implementation.

### ***2.4.7.2 JEPA and the Media***

#### **Overview**

Interviewees from (NCARE) noted that the media provided recognizable coverage of the Annual Pomegranate Exhibitions conducted in 2008 and 2009. Mainstream newspapers, TV and radio provided necessary coverage, and follow up stories on the exhibitions, nutritional benefits of pomegranate and farming techniques. However, such media activities are not planned nor sustained within a clear schedule of activities.

Jordanian media are not really focused on promoting awareness about the potentials of the pomegranate sector as a national source of income. Furthermore, JEPA is engaged in

minimal media activities and is limited to coverage of official events such as ministerial patronage and delegation visits, and responses to major legal and legislative matters of the horticultural sector.

### **Specifics**

According to one (BoD) member: "Unfortunately the media- especially some newspapers- do not know how to communicate issues related to the agricultural sector in general and the pomegranate production in particular". Furthermore, relevant news items are focused on issues related to new legislations and or laws of the agricultural sector, news releases from the (MoA), pricing of vegetables and fruit, and market information related to important export. In general, JEPA and relevant audiences believe in the significant role of the media in promoting the activities of the Association, in addition to educating the farmers and the general public about the pomegranate sector. In this regards, it is important to mention that different targeted groups have different understanding of the educational and promotional role of media on the national, regional and international levels.

Several journalists mentioned that JEPA lack skills for communicating with media and that there is no single point of contact for information about particular issues. Journalists recommended publishing more information on JEPA's official website, organizing more media briefings and tours to the pomegranate farms, and training of journalists on principles of reporting on relevant matters.

Furthermore, journalists acknowledged the need to improve communications with JEPA and relevant entities. They expressed their willingness to become partners and take on an active role in awareness raising campaigns about the sector. In addition, they expressed openness to reporting on JEPA achievements and ongoing processes for enhancing pomegranate production. They however mentioned that they would require further information from JEPA, MoA, (NCARE), and producers.

#### ***2.4.7.3 Agricultural Culture***

The interviews revealed a broadly shared belief that Jordanians' understanding of the agricultural scene and potentials in Jordan is very modest, and needs to be strengthened. Citizens need to be educated more about Jordan's agricultural sector, its benefits, potentials, and opportunities on the international level. A JEPA staff commented that:" We organize

field tours for potential International buyers, who -most of the time- are strongly impressed by Jordan's agricultural advancement. Ironically, Jordanians are not aware of this fact!"

It is important to promote understating of the potentials offered by the Jordanian agricultural sector, the ongoing projects also with regards to the pomegranate, its benefits, and ways to improve such investments.

A recommendation heard consistently in the interviews is that the way to improve agricultural knowledge is through the educational system. Furthermore, some farmers and representatives from (NCARE) expressed their interest in being part of a national awareness campaign on pomegranate farming. They are ready to open farms for school and the general public visits, give presentations, workshops, field trips, and issue relevant publications.<sup>3</sup> During a TV interview with the (NCARE) Director General, he stressed that "the Center in collaboration with the Ministry of Education are working on promoting the understanding of the importance of agriculture across governmental schools. They are working on engaging the students in agricultural activities so that students learn to develop a bond with their identity and this type of vocation".

Several media representatives said that it is the responsibility of the media and reporters to raise awareness and educate the public on agricultural issues specific to pomegranate farming. They are also ready to take on an active part in educational campaigns.

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<sup>3</sup> This interview was presented on the Jordanian TV/ News At Eight on March 18, 2010

## **2.5 MARKETING NEEDS OF CURRENT AND TARGETED JEPA MEMBERS IN THE POMEGRANATE SECTOR**

According to the data collected from the JEPA, the total number of current members is approximately 200 who specialize in the cultivation and export of different types of vegetables and fruits, whereas the number of current members who specifically specialize in the cultivation of pomegranates represent a very small percentage that does not exceed 3%. Accordingly, the association seeks to attract and target a larger number of pomegranate farmers, who total to approximately 1200 farmer distributed in various agricultural areas in Jordan.

While most of the farmers/producers received no information on JEPA, pomegranate farming was communicated through (NCARE). Workshops, field trips and two annual pomegranate exhibitions were conducted in 2008 and 2009.

Furthermore, NCARE with JEPA worked on branding for the sector starting with creating a brand name 'Pomejo', a logo, and slogan to go with it. The slogan conveyed a national natural heritage element found in: "Jordanian Pomegranate: Home Land". NCARE and JEPA also produced leaflets showcasing the history of pomegranate production in Jordan, the regions where it is grown, in addition to the different species and prices. Although farmers see pomegranate farming a potential investment for the coming years they still don't think it is considered as a national priority in the agricultural sector yet.

Most of the interviewed farmers communicated their interest in producing pomegranate, but commented that they had no access to date to information on best practices in pomegranate production covering techniques such as irrigation, pest control etc.. In addition, they expressed their interest in being part of official delegations and participations of JEPA in international exhibitions provided that their participation is partially or fully sponsored.

### **2.5.1 Marketing Needs**

Upon review of the study prepared by the JEPA in collaboration with a specialized team from the National Center for Agricultural Research and Extension (NCARE)<sup>4</sup>, and having interviewed a number of farmers pomegranate farmers who have been nominated to the

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consulting team by NCARE, it has been concluded that the most important marketing needs of farmers are the following:

- 1. More effective participation in relevant local, regional and international exhibitions:** Farmers have expressed strong interest in identifying the most important trade fairs and exhibitions, whether at the local, regional or global spheres, and they demonstrated their desire to participate more effectively in these exhibitions under the guidance and auspices of the association.
- 2. More effective distribution to the major fruit and vegetables grocery stores and supermarkets in Amman in needed:** Farmers have expressed strong interest in enhancing the efficiency and effectiveness of distribution of Jordanian pomegranates to the main fruit and vegetable outlets, grocery stores and supermarkets in Amman.
- 3. Marketing and export development training needs:** Most farmers expressed their general lack of basic commercial and marketing skills and knowhow, and they demonstrated their desire to receive training and capacity building sessions on agricultural marketing, export development to build their capacities in the commercial and marketing aspects of their agri-business.
- 4. The need to identify and get acquainted with the marketing opportunities in export markets:** In reference to the previous point, farmers also stressed on the importance of identifying and getting acquainted with the most attractive export opportunities and off-season opportunities for exporting Jordanian pomegranates. It is worth mentioning that JEPA has recently launched its Market Intelligence Unit (MIU) which avails important trade information including crop prices and export windows in the world main export markets by crop. It is therefore important to utilize such data and make it available for the farmers via an appropriate means.
- 5. Technical support in terms of packaging of pomegranate products.** Currently, (63%) of farmers and producers of pomegranate in Jordan use polystyrene for the packaging and marketing of their fresh pomegranates, whereas (35%) use plastic packaging and (11%) use carton and cardboard, while the rest use different bags, and that the majority of respondents use packages/boxes of (5 -10 kg) capacity, and (65%) only of the farmers perform manual grading of the pomegranate fruits. It is known that polystyrene containers have several negative environmental, ecological and economic impacts, including:

- They are used only once, as they are not strong enough and cannot be cleaned up. Reusing polystyrene containers transmits the remains of the old fruit and fungi to the new fruit.
- There is no mechanism to get rid of the polystyrene containers waste unless they are considered a type of waste that is sent to landfills. Polystyrene containers cause major problems for landfills, as burying them requires large areas and harms the environment. Burning polystyrene containers also pollutes the air and the environment.
- Polystyrene containers are costly since they cannot be reused frequently. The large number of disposed polystyrene containers causes the problem of landfills. In the peak season, the market deals with 3000 tons of local polystyrene containers daily, representing up to 250,000 boxes. If not disposed, polystyrene containers occupy an area of 6000 cubic meters per day. Although polystyrene containers can be incinerated without causing any damages, the magnitude of the problem makes this solution expensive. The cost is also an important factor, as it costs about JOD 0.30 per packaging unit of polystyrene.
- World Trade Organization and UNCTAD consider that cardboard, plastic, and wood are the only substances suitable for the packaging and handling of vegetables and fresh fruit. (Packaging Product Module, P. 30, UNCTAD, WTO)
- Many countries are restricting the use of extruded polystyrene in packaging and handling because of its negative environmental impacts. Extruded polystyrene is also rejected by air cargo companies

#### **6. Technical support with regards to determining the priorities of the product mix.**

It was found that (44%) of farmers produce different amounts of molasses and pomegranates juice from the pomegranate fruit, and (13%) only carry out storage of fruits in their houses for a maximum of (4) months to sell them on the dates they believe are most appropriate. On the other hand, the growing interest in pomegranate initiated consumers' needs, especially in key export markets, including markets in North America and the European Union. This interest was aroused following the health care behaviour, and the intake of fresh food full of health benefits, as well as the complexity and diversity in preferences and desires of consumers with evolving lifestyles. All of the above triggered the emergence of new innovative products that can be used conveniently. An example to buttress the abovementioned consumer preferences is pomegranate granules (arils) that are

immersed in pomegranate syrup and can be eaten without the need to peel the pomegranate fruit.

7. **Clarifying the differences between the numerous Jordanian pomegranate varieties**, be it for the consumers in the local market or the export markets, as well as to wholesalers, middlemen and distributors. The varieties of pomegranates have reached more than 25 all grown in Jordan currently. These varieties differ in taste, ranging from sweet to sour. Pomegranate varieties also differ in colour and weight, which is reflected in the variation in the prices of these items. The differentiation in pomegranate varieties in terms of quality monitors and measures consumer preferences, be it in the local market or export markets towards different Jordanian pomegranate varieties. This will assist farmers and producers to concentrate strategically on the cultivation and production of the items demanded the most by the domestic market or the export markets.
8. Finally, the farmers expressed their wish that the media play a greater and more effective role in **increasing consumer's awareness regarding the health benefits of pomegranate** in general, and the importance of eating these fruits regularly as they contain many health benefits.

### 2.5.2 Production-related Technical Needs

The Study conducted by (NCARE) showed that there are technical needs related to improving the agricultural practices that lead to improving the quality of the pomegranate product for Jordanian pomegranate growers. The most important technical needs are the following:

1. **Irrigation**: it was found that only 14% of pomegranate farmers in Jordan use the drip irrigation systems, and the remaining 86% use the surface irrigation channels or the traditional immersion. It was also found that the majority of the farmers obtain only 54% of their actual farm's need of water. The sources of irrigation water were as follows:

Source of Irrigation Water	Percentage of Farmers
Spring Water	76%
The Jordan Valley irrigation sources (Jordan Valley Authority)	14%
Private wells	10%

It was noted that 8% of the farmers rely on tanks to provide the required irrigation water for their farms, where as less 10% purposely regulate their irrigation systems to lessen the problems arising from cracked pomegranate fruits. The minimal amounts of irrigation water available for pomegranate farms reduce the expected productivity of the crop. It is estimated that each acre of cultivated pomegranates requires 750-800 cubic meters annually<sup>5</sup>.

2. **Fertilization:** According to the pomegranate sector study conducted by NCARE, about (51%) of the pomegranate farmers use fertilizers to sustain their pomegranate orchards. Amongst fertilizer users, 22% actually consult experts in the field. Scholarly references and research centers stress on the importance of organic and chemical fertilization at a rate of 20 kg of organic fertilizer in the winter and 2 kg nitrogen fertilizer or ammonium sulfate fertilizer or other equivalent nitrogen fertilizers like calcium nitrate or urea in two installments, one in March and the other in May.
3. **Pruning:** pruning is considered a critical cultivation procedure. Of the total pomegranate farmers, 90% prune the pomegranate trees, mostly in the fall season (October and November). As for the sample farmers, 29% of them prune their pomegranate trees and 90% of them prune in April and May depending on the type of pomegranate and the cultivation region. In general, studies indicate that each pomegranate tree should hold an average of 150 pomegranate fruits, with an average weight of 500 grams per fruit<sup>6</sup>.
4. **Decomposing the soil and irrigation water:** of the total number of sample farmers, 6% actually decompose the soil and irrigation water periodically.
5. **Prevention:** of the total number of sample farmers, 79% were using chemical controls for the agricultural pests that grow in pomegranate orchards. Sample farmers rank the problems faced by pomegranate orchards as follows: cracked pomegranate fruits, pomegranate fruit worm, aphids, fungal diseases, fruit fly, twig, stem borer sometimes with reference to the lack of certain elements (yellowish color)

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<sup>5</sup> NCARE pomegranate sector study

<sup>6</sup> Depending on the pomegranate variety.



## **2.6 ANALYSIS OF THE GLOBAL POMEGRANATE MARKET**

The cultivation of pomegranate was introduced quite early in the Mediterranean and eastern countries like India. But in Spain, it was introduced after the Islamic influence there and it reached England in the thirteenth century. Much later, Spaniards took this important plant to the new world-Mexico and Florida. Its cultivation gradually spread to other countries too and now it is grown almost everywhere in the tropical and subtropical climate.

At the global level, Iran is the world's largest producer and exporter of pomegranates with an estimated annual production of 670,000 tons. In addition to Iran, other countries including India, Turkey, Spain, Tunisia, Morocco, Afghanistan, China, Greece, Japan, France, Armenia, Cyprus, Egypt, Italy and Palestine also cultivate this product.

Pomegranate is native to Iran, although its wild forms are found in India, Afghanistan and Syria. Presently good quality pomegranate comes from Turkey, Iran, Afghanistan, Syria, Morocco and Spain. In India, Sholapur is famous for juicy pomegranate fruit known as Anar. In Turkey pomegranates are served during important feasts.

Internationally the market for Pomegranates is evolving as it establishes itself amongst the competition from other fruits. New products and players are evolving all the time. Presently, good quality pomegranates come from Iran, Turkey, Afghanistan, Syria, Morocco and Spain.

### **2.6.1 Global Market Structure**

The global figure for trade in pomegranate can at best only be estimated, considering that (1) there is no FAO data on acreage and production of pomegranate at world level is available, and (2) data for disaggregated level through UNCTAD's COMTRADE and PC TAS database (only sources of reliable data on international trade) is available at HS 6 digit level. Pomegranate comes at the 8 digit HS level under the 6 digit HS code 081090 (Other fresh fruits nec). Global exports under this 6 digit level amounted to US\$ 751.4 mn in 2005-06 as against US\$ 558.6 mn in 2003-04. Assuming that 25% of exports under this category comprises pomegranate, one can work out a rough estimate of global exports of pomegranate at US\$ 188 mn in 2005-06. The main exporters under this category include: Thailand, Spain, the Netherlands, Hong Kong and France.

The global production of pomegranate is estimated that approximately 2,000,000 M Tons. Until very recently, Iran used to be the largest producer and is sometimes seen as the quality

leader: “The Iranian pomegranate is far better than pomegranates from other countries with regard to color, juice content and sugar content. A better taste is difficult to prove, but results of tastings are very good”.<sup>7</sup> For juice, Iran and India together account for 95% of the world’s concentrate production. In the last few years, research shows that India has come just above Iran as the largest pomegranate producer.

However, the most recent data available show that Iran are the largest producer as shown in the tables below. India and Iran are followed by Spain. Other pomegranate cultivating countries include: Afghanistan, Azerbaijan, Pakistan, Egypt, Jordan, Syria, Tunisia, Lebanon, Israel, Chile, Peru, USA, and other countries.

Iranian Exports of Pomegranate (2003 – 2007) tons	
Year	Total
2003	14,075
2004	23,417
2005	24,389
2006	29,565
2007	27,439

Iran and India have the biggest pomegranate cultivated areas, followed by the United States, Turkey and Spain.

Top Pomegranate Producing Countries (2005)	
Country	Area/Hectares
Iran	63,733
India	54,755
United States	14,000
Turkey	8,500
Spain	3,000

Spain is considered the biggest producer and exporter of pomegranates in the EU (given that Turkey is not part of the European Union). Valencia (Alicante) acquires 80% of the

<sup>7</sup> Source: Geurts from Bakker & Leenheer quoted in Fresh Plaza article : “Iranian pomegranates available in Europe”.

cultivated area in Spain, followed by Mallorca. In 1996, Spain's pomegranate production was estimated at 25,039 tons, and it increased to 30,000 tons in 1998, of which Valencia produced 90.1% and Mallorca produced 9.6%.

Pomegranates are also cultivated in Afghanistan, Pakistan, Armenia, Georgia, Tajikistan, Jordan, Egypt, Italy, Tunisia, Morocco, Peru, Thailand, Chile, Australia, Cyprus, Sudan, Mauritania, Azerbaijan, Bangladesh, France, China, Japan and Greece.

Azerbaijan, Germany, Australia, Armenia, Uzbekistan, Afghanistan, Spain, UAE, England, Ukraine, Italy, Bahrain, Bulgaria, Belgium, Pakistan, Turkmenistan, Belarus, Romania, Japan, Sri Lanka, Sweden, Switzerland, Singapore, Saudi Arabia and the Netherlands are all considered one of the most important importing countries.

The prices of pomegranates in the European wholesale markets range from (1-5) Euros/Kilogram. Reports indicate that packages of capacity (3.5-4) kg are sold in Spain for US\$ 11.65 and other packages with a capacity of 3.5kg are sold in the English Market for (7.5-9.5) British Pounds. According to (Hegde, 2008), the Indian packages of 3 kg capacities are marketed for Euros 4 and for Euros 8 in Europe, whereas the price of each Californian pomegranate fruit imported to Australia US\$ (2.5-3).

## **2.6.2 Current Global Trade and Supply and Demand Trends**

In the US, pomegranate is now cultivated in California and Arizona. Growers in California produce approximately 80% of domestic pomegranate crop on approximately 16,000 acres. Production is rising more so in California of sweet varieties only. All other Northern Hemisphere countries seem to be stable except possibly Turkey and Iran. South Africa has seen a number of trial plantings occur in the recent couple of years. Chile and Peru have started planting Wonderful in an attempt to capture some counter seasonal market share into the USA.

In Europe, Spain is the only major producer of pomegranates in the Western Europe region for commercial export. Within the CEE and Eastern European region, pomegranates are grown in several countries but not in large-scale "commercially exportable" quantities.

In general, world production of pomegranate is rising rapidly but is not able to keep up with demand, especially in the hot market of USA.

The following are some of the main global pomegranate consumption trends:

- The products that consumers are willing to pay higher prices for are large, red pomegranates. For Jordan to compete in these markets, it needs to ensure its products are in line with consumer preferences.
- Pomegranates, both fresh and derivatives, are increasing in popularity. Companies rolled out 450 pomegranate products in 2006, bringing the total to 961 products launched since 2003. Everything from tea and truffles to ice cream and chewing gum is now being infused with the flavor of pomegranates.
- The demand for pomegranate juice and flavoring is exploding and there is a large growing market for concentrate.
- Pomegranates have a natural sun protective factor of 8, and are increasingly being used in face and hand creams.
- Arils, which are pomegranate seeds still in their sacs, have been appearing in retail stores in the United States recently. They may be used fresh for sprinklings on salads or other dishes. Dried, they are developing a reputation as a health food supplement.
- The popularity of the fruit and the willingness of consumers to pay a relatively high price represent a good opportunity.
- However, the window of time on this opportunity will be relatively short as new supply comes on board to fill the demand.

#### **Pomegranate Specific Demand Drivers and Indicators:**

In general, the same factors influencing fruit and vegetable consumption everywhere in the world are increasing the popularity of pomegranates. The following factors and indicators have been observed through desk research:

- Health benefits and the labelling and marketing of the next “superfruit”. Among reported health benefits: antioxidant properties to fight disease, lower blood cholesterol levels, high potassium content (almost as high as orange juice, but not a source of vitamin C); good source of fibre. Possibly beneficial in fighting prostate cancer and breast cancer. Even some studies intimating that pomegranate juice might help in removing AIDS virus.

- Health and fitness trends: A push towards more healthy living and healthy lifestyles. Obesity is becoming a serious health problem in the USA and many EU countries. Increasing the consumption of fruit and vegetable is one of the measures most often mentioned by consumers to reduce weight.
- Pomegranate explosion in USA is largely to one company's marketing efforts: POM Wonderful.

The following table highlights key consumption trends (all foods) for USA and Europe across the next few years, and matches each trend with the implications for Jordanian pomegranates<sup>8</sup>:

<b>USA and EU Key Consumption Trends (of all foods)</b>	
<b>Key Consumption Trends</b>	<b>Implications for Jordanian pomegranates</b>
<b>Greater demand for convenience</b>	Plays against the demand for pomegranates, which are often perceived as difficult to eat.
<b>More diversity for choice</b>	Pomegranate is a relatively new, exotic fruit with which many Americans and Europeans are unfamiliar
<b>Growth of demand for ethnic / exotic ingredients</b>	Pomegranates are popular in many middle eastern countries
<b>Increased demand for organic products</b>	Not necessarily relevant for pomegranates, though organic is a growth niche
<b>Polarization of markets (premium and budget)</b>	Pomegranates may split as the fruit becomes more popular and common
<b>Demand for open, honest and informative labeling</b>	Labeling and marketing communications can play a pivotal role in promoting the health benefits of pomegranates

In Europe, the consumption of super fruits, fruits with a high degree of beneficial nutrients such as antioxidants has also grown significantly. They have come to occupy an important niche in the health and wellness market. Examples of super fruits include pomegranate, açai (a berry from the Amazon), blackcurrants, goji berries, blueberries and blackberries. Most super fruits are consumed after processing (for instance as fruit juices) rather than fresh. Natural foods products without additional sweeteners or other artificial additives are another niche within the health market.

<sup>8</sup> Source: CBI Fresh Fruits and Vegetables 2006

The food processing industry has responded to this demand by mixing fruit with dairy products, sports drinks, breakfast cereals and so on. More information on these niches can be found in CBI EU market survey 'The EU market for preserved fruit and vegetables' and 'Preserved fruit and vegetables: the EU market for fruit juice'.

Fresh fruits and vegetables play a key role in the health trend. They are seen as contributing to good health as they naturally contain vitamins, minerals and antioxidants. Regular consumption of fruit and vegetables is promoted by health authorities as essential to maintaining a healthy diet, reducing weight and preventing diseases. While health benefits attract much attention the taste of fruit and vegetables is of equal importance in consumers' decisions to buy fruit and vegetables.

## **2.7 ANALYSIS OF THE POMEGRANATE SECTOR IN JORDAN**

The pomegranate tree is considered one of the most ancient fruit trees in Jordan, and its cultivation is spread in various regions of the Kingdom of different geographical characteristics. Pomegranate has been a source for income for Jordanian farmers and traders for decades. Its plantation extends north from 200 meters below sea level to the rift valley, inland, heights, and the wider parts of Eastern Badia.

Pomegranate is grown mainly in tropics and subtropics and it can grow in arid and semi-arid regions. In Jordan, the pomegranate tree has the ability to withstand drought and is characterized by its relative ease of breeding and care compared to other fruit trees. In addition, the pomegranate tree is characterized by its high productivity, which amount to more than 100 kg of the tree in some varieties, and the minimal post-harvest requirements and relatively low transport and storage costs makes the pomegranate crop economically and developmentally reliable in improving the income levels of farming families and eventually reduce the problems of poverty and unemployment.

The total pomegranate cultivated area in the Jordan is approximately 12,000 donums yielding an estimated revenue of approximately 28-36 million/year. Cultivating pomegranate in Jordan enjoys a comparative advantage manifested by the relative length of production period which is in excess of four months, in addition to the abundance of pomegranate types of high productivity and the proportion of high sweetness and flavor associated with the unique geographic location of antiquity, especially in traditional areas of production.

Due to its high nutritional value and medical and therapeutic benefits of pomegranates and because it is rich in antioxidants, which protect the body from chronic diseases, diseases of the arteries and heart disease and cancers of the prostate, diabetes, there has been a rapid increase in demand for pomegranate locally, particularly in the Amman market, but most notably internationally in recent years. Nevertheless, despite the importance of pomegranate, there has been a general lack of attention in previous years, and the major production areas have not been fully utilized by any development projects.

The cultivation of pomegranate in Jordan is generally marred by a number of negatives, including:

1. Adoption of traditional techniques that are inefficient;
2. Lack of reliable breeding programs and nurseries;
3. Absence of collective actions of relevant associations,
4. Rather limited experience of farmers and poor information available pertinent to the production and marketing of pomegranate,
5. Lack of integrated control systems by most orchards;
6. Shortage in local experts, specialists, which led to the decline in production and decline in area under cultivation, and not to expand despite the willingness of farmers and investors.

The current status of the pomegranate sector can be highly promoted if the available water sources were utilized and developed and if the water in the cultivated pomegranate lands was harvested (especially since most of the pomegranate is cultivated in areas with a good annual rainfall exceeding 300 mm).

The National Center for Agricultural Research and Extension (NCARE) in collaboration with Jordan Exporters and Producers of vegetables and fruits (JEPA) carried out a national campaign to promote and market the Jordanian pomegranate. JEPA in its turn started to meet with producers, exporters, marketing experts, and agricultural development personnel. Those meetings were followed by a number of scoping meetings, which drafted the visions and ideas of many researchers, extension workers and farmers, the agencies and organizations concerned, and were followed by the formation of a steering committee of NCARE and the private sector to manage the proposed project and develop ideas for the future development of the sector.

JEPA has also attracted the entities interested in the cultivation of pomegranates and initiated Jordan's first pomegranate exhibition. With all its efforts, JEPA managed to acquire a grant of JOD 28,000 to bring in experts in the pomegranate crop, and to visit countries with advanced pomegranate cultivation. JEPA also assisted in understanding the challenges and needs of the farmers and the crop, which revived the local market and opened doors to exports.

In collaboration with a specialized team in NCARE as well as agriculture advisors from all over Jordan, JEPA conducted a Baseline Survey that included the potential opportunities in cultivating and developing the pomegranate crop. The potential opportunities were demonstrated to the Ministry of Planning and International Cooperation to be studied and funded. It is highly hoped that the pomegranate project mentioned previously will be adopted by the private and public sectors in order to alleviate the level of farmers and improve their experiences, knowledge, and skills, and improve the quality of local pomegranate production. Also, to increase the production capacity and develop the production areas by decreasing the poverty level in these areas and improving the volume of exports and market the local expertise and products.

Jordan is home to over 25 varieties in taste ranging from sweet seedless, to sour-sweet, to sour to name the least. Colors also range from black, to red, to dark red, to yellow and to pink. Despite the differences on the designation of some local pomegranate varieties, there is a general agreement on dividing Jordanian pomegranate varieties into the following three main groups:

1. **Sweet Varieties:** the percentage of sugar concentration is 16-22% and acidity levels varies between 0.1% to 4.2%. Examples of the sweet varieties include: Khudary, Frasi, Halawy, Shamy, Baradi, and Shwashy.
2. **Sour-Sweet Varieties:** the percentage of sugar concentration is 12-16% and acidity level ranges between 4.2% to 6%. The most popular variety under this group is Ras Elbaghl variety.
3. **Sour Varieties:** the percentage of sugar concentration is 8-15% whereas acidity levels range between 6% to 9%. Examples of varieties under this group are: Black and Zarouri varieties.



The following table shows examples of pomegranate varieties planted in Jordan:

<b>Most common pomegranate varieties in Jordan</b>	
<b>Variety</b>	<b>Description</b>
<b>Khudary</b>	The most common pomegranate variety in Jordan. Considered as one of the sweet, "luxurious" varieties. The khudary tree yields up to 85 kg of pomegranate fruits, and in some seasons the yields reaches up to 100 kg. The outer shell's color is unique reddish whereas the color of the arils is dark red. The weight of a single khudary pomegranate fruit is approximately 500 gm. The khudary variety has a unique sweet taste and has a relatively long storage life.
<b>Baradi</b>	One of the rather sweet-taste varieties. Average tree yield is 65 kg. Color of the outer shell is pinkish yellow whereas the color of the arils is pink. Average fruit weight is 250 kg. This variety is characterized by being juicy which makes it suitable for processing and juice making. This variety is not suitable for long storage periods because of its rather thin, delicate outer shell.
<b>Red-Qratty</b>	One of the sweet varieties. The tree is of a medium yield level. The outer shell's color is yellow and turns reddish as it nears the maturity levels. This variety is characterized by its rather large, red arils which have rather large seeds.
<b>Shamy</b>	Another one of the sweet varieties. The tree has a high yield rate and the weight of the fruit reaches more than 500 gm. The outer shell is red and the arils are also red. This variety matures during September and October and it is not suitable for long storage periods because its shell can crack quite easily.
<b>Frasy</b>	Similar to khudary in terms of quality and sweet taste. The tree yields approximately 85 kg. The outer shell is light yellow and the arils are pink. Average fruit weight is 500 gm and in some cases a single fruit can reach 1 kg of weight. This variety is characterized by being late in maturity and its very good taste. This is one of the popular varieties in the Jordanian market and it is suitable for storage.
<b>Halawy<sup>9</sup></b>	One of the most marketable varieties because of its high yield rate. The outer shell is light pink at the beginning of the maturity season and turns to dark pink by October. The average fruit weight is 450 kg. This variety is quite prone to pomegranate warm infection.
<b>Ta'efy</b>	Introduced to the Jordan recently. Tree yields an average 55 kg of fruits. Outer shell is yellowish green, and the pulp is yellowish white. This variety is characterized by being sweet and juicy, which makes it suitable for processing and juice production. This variety is not suitable for storage.
<b>Mawardy</b>	One of the sweet "luxurious" varieties. Sweet in taste and the seeds are very soft. Late maturity and the average tree yield is 50 kg. Outer shell is yellowish green sometimes with red lashes, and the pulp is dark red at maturity (around October). The average fruit weight is 300 gm and it is not suitable for storage.
<b>Melesy</b>	Also sometimes referred to by farmers as: "Molouki". Outer shell is yellow even at maturity. Pulp is white and juicy which makes it suitable for processing and juice production. Matures during September and October.
<b>Shwashy</b>	One of the sour-sweet varieties but turns to sweet at maturity. Tree yields an average 80 kg. Outer shell is thin and delicate and its color is red. Pulp is also red and the average fruit weight is 500 kg. This variety matures relatively early and is very popular for processing and juice production as well as to consuming it as a fresh fruit.
<b>Zarouri</b>	One of the sour varieties as its acidity level reaches 8.5%. The tree has a high yield rate, the outer shell is yellowish green and the pulp is pinkish red. The outer shell is thick which makes it suitable for long storage periods. Suitable for the manufacturing of molasses.
<b>Abu Surrah</b>	Common in the Bani Kinana district. One of the sour varieties, suitable for the production of molasses. The tree has a high yield rate. Outer shell is yellow, pulp is pinkish red. Average fruit weight is 400 gm. Has a late maturity peak and it is suitable for storage.
<b>Black</b>	One of the sour varieties. The average tree yield is 50 kg. Outer shell is black and the pulp is red. Average fruit size is 500 gm. Has a late maturity peak and is quite prone to cracking.
<b>Other varieties</b>	There are other varieties also available for Jordanian cultivation such as the recently introduced American variety "Wonderful", Khashaby, Zeglaby, Nouran, Ras Elbaghl, and Yara, in addition to a number of Spanish varieties which have been recently introduced in the Northern Shouneh area.

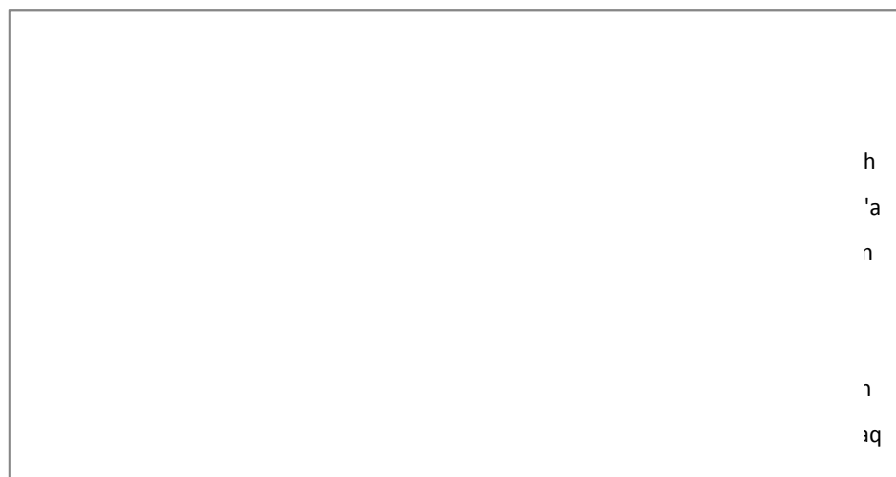
<sup>9</sup> A lot of pomegranate farmers in Jordan use the term "Halawy" when referring to other varieties such as Barady, Mawardy, Shamy and Red-Qrati.

### 2.7.1 Analysis of Market Structure and Characteristics

Study prepared by NCARE reveals that pomegranate cultivation is concentrated in the governorates of Irbid, Ajloun, Tafileh, and Balqa respectively. The estimated total area planted with pomegranate is about (4036) donams, distributed between over (1208) farmers. (67%) of the total planted area in the Kingdom is in the governorate of Irbid and the rest is distributed to the rest of the governorates of the Kingdom. While the size of the possession rate was highest in the governorates of Zarqa Governorate, followed by Mafrq, Ajloun, and Ma'an, with an average cultivated area per the farmer is (8) donams of agricultural land, and an average number of trees of (243).

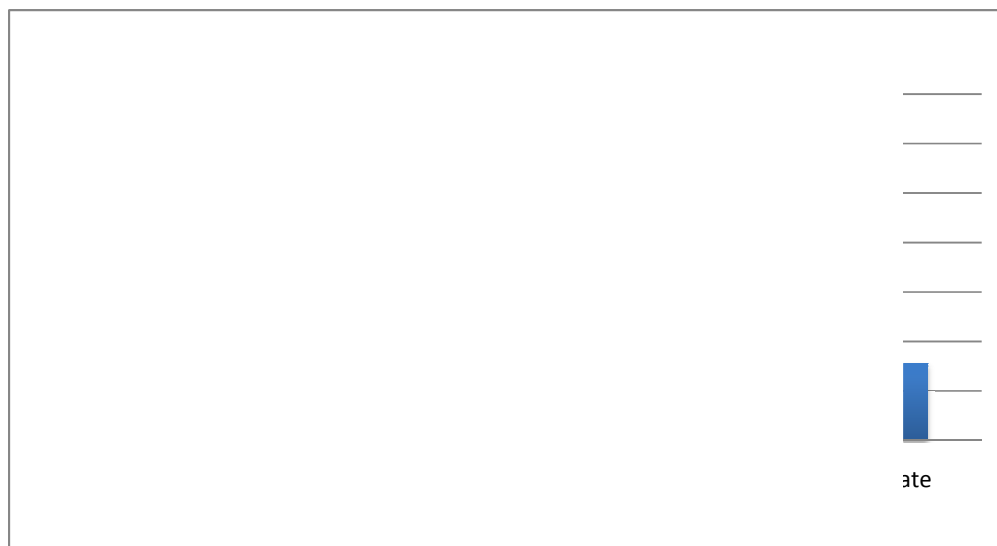
Areas planted with pomegranate and number of farmers by governorate (2008)				
Governorate	Area/Dunum	Relative Significance (%)	Number of Farmers	Ownership Rate/Dunum
Irbid	2700	67	720	3.75
Tafileh	379	9	190	1.99
Balqa'a	245	6	150	1.63
Ajloun	468	12	94	4.98
Karak	22	1	34	0.65
Ma'an	42	1	11	3.82
Zarqa	140	3	5	28.00
Mafrq	40	1	4	10.00
TOTAL	4036	100	1208	3.34

The average age of pomegranate farmers is (56) years, mostly located in the age group (39-70) years. Farmers who are less than 39 years old represent only 9% of the total number of pomegranate farmers in Jordan. The majority of pomegranate farmers (60%) have had primary and secondary education, and the percentage of university degree holders is (21%), whereas the percentage illiterate farmers is minimal and does not exceed (7.8 %).



### Distribution of Pomegranate Farmers by Age Group

Age Group	Percentage (%)
28 – 38	8.8
39 – 49	21.6
50 – 60	34.3
61 – 70	23.5
Above 70	11.8
TOTAL	100



The following table shows that the average annual income of pomegranate farmers in Jordan amounts to JOD 2,352. The average number of years of experience in the cultivation of pomegranate is about 24 years. In spite of this, however, 98% of pomegranate farmers in Jordan recognize the importance of agricultural extension to the advancement of the pomegranate sector in Jordan. The pomegranate sector survey conducted by NCARE shows that 61% of farmers have been visited by an agricultural advisor for at least once a year.

Pomegranate production in Jordan ranges between (135) kg in the lowest level to (8) tons per donum at the highest level, averaging at (1.7) tons per donum, compared to a global average ideal of (4-6) tons per donum<sup>10</sup>. On the whole, the Jordanian production

<sup>10</sup> On the basis of 60 trees per donum.

rate is close to the average productivity of unit area in Iran and India which is 1.25 tons per donum.

Prices: the wholesale selling price of Jordanian pomegranate ranges between JOD 250 to JOD 2000 dinars per ton averaging at JOD 730 per ton depending on the pomegranate quality and variety.

## **2.7.2 Consumer Analysis: Analysis of End Consumer Preferences and Buying Patterns**

### ***2.7.2.1 Consumer Preference and Buying Patterns in the Local (Jordanian) Market***

Interviews were conducted with sellers of some of the main fruit and vegetables grocery stores as well as supermarkets including COZMO, in order to arrive at an understanding of the main consumer preferences and buying patterns in the local Jordanian market. The following represent the main findings:

1. The average Jordanian consumer usually purchases pomegranates from the side-road outlets splattered along the Amman-Jerash-Ajloun-Irbid highways during the pomegranate season. The reason for this choice of outlet is due to a number of factors: 1) the pomegranate season comes during the mid summer season when many Jordanian families go to farms and recreations in Ajloun and Jerash 2) because pomegranate, unlike other fruit, is not frequently available at fruit and vegetable grocery stores. 3) there seems to be a general perception that pomegranates bought from the side-road outlets are fresher and somewhat cheaper in price since the room for bargaining with the sellers is bigger.
2. The vast majority of Jordanian consumers lack knowledge on the names and distinctions between different pomegranate varieties.
3. However, most Jordanian consumers tend to prefer the sweet, red varieties of pomegranate and tend to choose the pomegranate fruits that are fairly bigger in size.
4. The consumption of pomegranate fruit is limited to eating the fresh fruit and the average Jordanian consumer does not opt to manually squeeze the fruit for home juice making.

#### ***2.7.2.2 Consumer Preferences and Buying Patterns in the Main Export Markets***

A number of characteristics vary between pomegranate genotypes and are key to identification, consumer preference, preferred use, and potentially niche marketing. The most important traits are fruit size, husk color (ranging from yellow to purple, with pink and red most common), aril color (ranging from white to red), hardness of the seed, maturity, juice content, acidity, sweetness, and astringency.

Consumption of fresh pomegranate, as well as derivatives such as juice and flavoring, is exploding and the fruit is seeing exceptional growth in demand in the US and Europe. The popularity of the fruit and the willingness of consumers to pay a high price represent good opportunities for additional producers to enter the market. However, the window of time on this opportunity will be relatively short, as new supply comes on board to fill the demand and drives down prices.

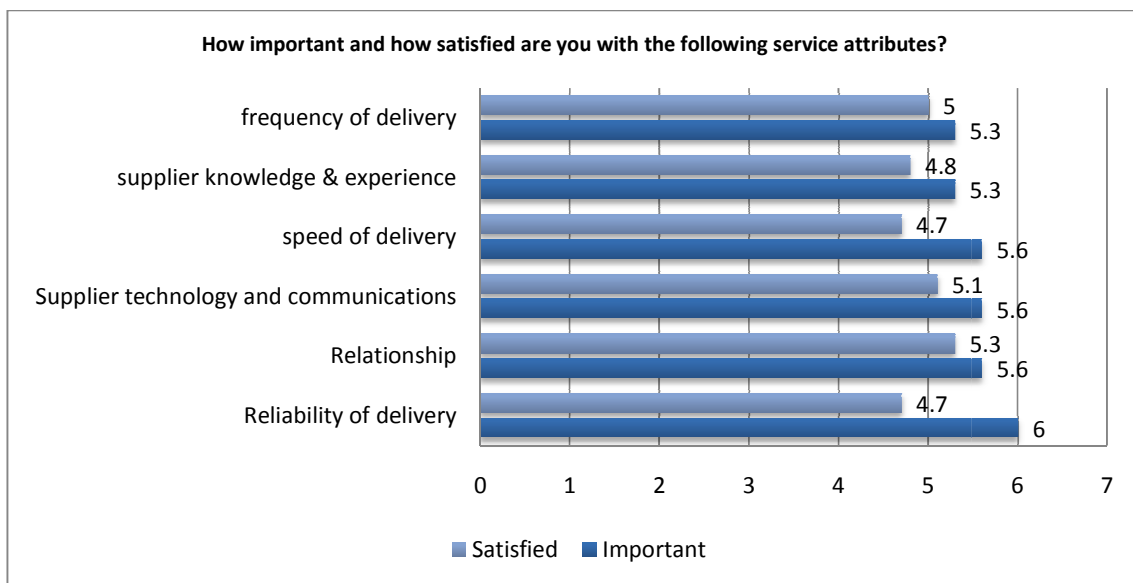
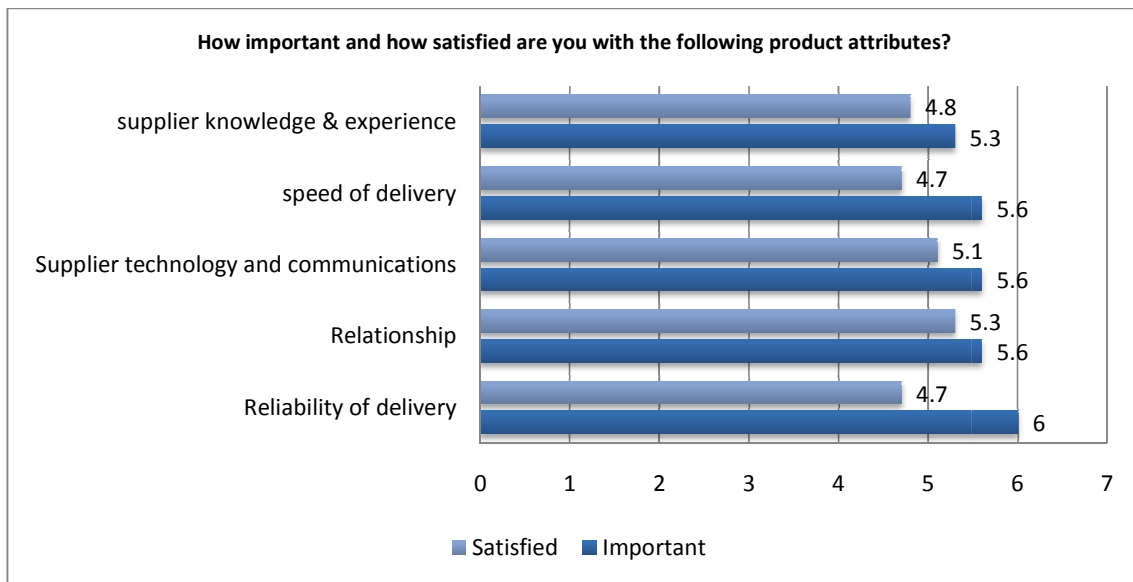
In general, research shows that the worldwide general desirable fruit characters of fresh pomegranate for export purpose are:

- ♦ Dark rose pink colour of the fruit.
- ♦ Fruit weight around 500 gms.
- ♦ Round shape of the fruit.
- ♦ Uniform size and shape of the fruit in a pack or box.
- ♦ Dark rose pink arils.
- ♦ Softness of the seeds.
- ♦ Higher sugars near about 16-17<sup>0</sup> Brix.
- ♦ Free from scars, russetting, disease spots, insect injury, scratches, etc.
- ♦ Smooth cutting at the stem end.
- ♦ Bracts/calyx without any damage and having freshness.
- ♦ Pleasant flavour and aroma.

Research has shown that consumer preferences with regards to pomegranate varieties is quite different from one region to another. Having said that, the following table summarizes the key research findings regarding consumer preferences of pomegranates:

<b>Pomegranate: Key Consumer Preferences</b>	
Country/Region	Key Consumer Product Preferences
EU (Particularly Western Europe)	<p>The sour varieties of pomegranate such as the Indian Bhagwa' (Kesar) variety, which is compared to Spanish Red variety, has been in high demand in the European and West Asian markets.</p> <p><b>Soft seeded, coloured varieties with high yield of juice with easy to remove arils are preferred.</b></p> <p><b>Pomegranates weighing more than 500 gms with good quality is widely accepted in the EU markets.</b></p>
	Varieties with big sized fruits was the preferred one, and the fruits were exported to the Gulf countries.
USA	<p>preference of some consumers for cultivars with less acid or softer seeds is also compelling consideration of more diverse cultivars, which should broaden consumer interest.</p> <p>Honey vanilla yogurt with crunchy pomegranate seeds. It has natural probiotics and antioxidants. Comes in a cute pomegranate-shaped package. For all ages, but especially kids.</p> <p>Pomegranate Ice Cream Fizzy is an unusual cold, <b>refreshing</b> ice cream drink full of <b>antioxidants</b> and <b>heart-healthy</b> pomegranate juice</p>

In order to succeed in exporting Jordanian pomegranates to the world export markets, and regardless of the strategic position taken, an understanding of customers and the requirements of product and services must be developed. An understanding of importer and retailer needs is crucial for success. The following charts outline, in general (not specific to pomegranates) the service and product attributes required by fresh fruit importers in the EU (which can be used as a case example to benchmark against):



Among **product** attributes, traceability is extremely important, even higher than the perceived quality of the product. Interestingly, price appeared in the top five – this is a low margin business with high turnover where, as one importer put it: “Every penny counts”. Significant supplier dissatisfaction exists with traceability standards and price, indicated by satisfaction ratings being lower than important ratings.

Among **service** attributes, reliability of delivery was the one “non-negotiable”: this is a zero inventory business. Also around delivery, speed and frequency rounded out the most important attributes, though frequency does not necessarily mean daily. Relationship issues,

including supplier technology and communication were also highlighted as important. The most dissatisfaction exists with reliability as well as with speed of delivery<sup>11</sup>.

Specifically for pomegranate, quality is primarily determined by size and color. For size, the trend going forward is to go for larger fruit, not smaller, but there may be a niche to introduce a new variety that is smaller and if there is potential to market it as a specialty. Customers generally prefer red fruits, both externally and internally, though some say that yellow fruits from Spain are tastier. The names of new varieties introduced in the United States play on this preference for the redness of pomegranates: Pink Satin, Red Silk, Kashmir Blend, and Garnet Sash<sup>12</sup>.

Quality, encompassing the direct product characteristics (appearance, taste) as well as the production path and traceability, is the most important attributes to purchasers all along the value chain. But quality is just a “in the game” baseline requirement. In addition, each potential entrant to the EU market for example, has to determine their competitive advantage when approaching the importers and retailers. There are three reasons a supermarket (and supplier to a supermarket) will take on a new supplier: 1) price advantage; 2) off season opportunity; 3) new and unique product. Unless a new supplier can offer one of these three criteria, they have little chance of entering the market. Fresh pomegranates, offering the desired consumer characteristics, would qualify as a new and relatively unique product<sup>13</sup>.

### **2.7.3 Competitive Overview**

There is hardly any competition for Jordanian pomegranates in the Jordanian market. During sometimes of the year, Syrian pomegranates arrive in minimal quantities compared to Jordanian pomegranates in the market. On very rare occasions and in minimal quantities, Egyptian pomegranates arrive as well. Therefore, there is not any real competitive threat emanating from regional pomegranates in the local Jordanian market.

The following overviews the major competition threats to entry for developing countries, which Jordan forms a part, to the EU markets in general (as an example representing the

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<sup>11</sup> Source: OTF Group: Fresh Fruit Importer Survey November 2005. Answers ranked on a scale of 1 – 6, where 6 = extremely important. Note: Survey is not specific to pomegranate but is designed to give a general overview of what is important to fresh fruit importers to the EU market.

<sup>12</sup> Source: OTF Group Report on Pomegranates – Albanian Export Opportunities to Europe and the Region December 2007

<sup>13</sup> Adapted from information contained in the report “Export Market for High Value Vegetables from Tanzania”, DAI Washington 2007



main export markets), matched with the implications for Jordan and pomegranates, if applicable:

<b>Competitive Overview (in the case of Exporting to the EU market)<sup>14</sup></b>		
<b>Major threats for exporters from developing countries looking to serve the EU market</b>	<b>Implication for Jordanian Pomegranate</b>	<b>Level of threat</b>
Overproduction of fruit in EU countries, leading to low priced domestically produced fruit and vegetables competing with more expensive, imported products.	Not relevant; apart from Spain there are no major European producers.	Low
Stagnating or declining consumption of fruit and vegetables in old EU countries; consumers will not consume more food but will make changes in eating habits and choice of products ("battle for stomach share")	Not relevant for pomegranates with are experiencing strong growth	Low
General price pressure of food, influencing the retail prices of fruit and vegetables; price reduction is expected to continue in the near future.	Need to enter and stay at premium end of the market.	Med
First-mover advantage for new products eroding fast, since other producers are likely to copy the product or production process rapidly including a spiral of overproduction and falling prices.	Potential flood of products coming on line with 2-3 years, especially to fill the counter season opportunity	High
Certification, requiring for example GlobalGAP or EurepGAP or ISO 22000 for the production process of fresh fruit and vegetables and GMP/HACCP/BRC for processed fruit and vegetables, requiring serious managerial and technical efforts and involving costs	Significant production investments required, as with all fruits and vegetables	High
Fluctuating prices of fruit and vegetables, induced by fluctuating supply	Timing of production season	Low-Med
Increased consolidation in buyers market, leading to increased buyers; power, forcing producers to cost-efficient and large-scale production and making it more difficult for small scale and new producers to break into the market.	Pomegranates are a good small holder crop but distribution channel pressures are real.	Med
High (and rising) fuel prices increasing the cost of transport	Jordan is relatively close to the EU market (compared to India and Iran), but is relatively far (compared to Turkey and Spain).	Low-Med

<sup>14</sup> Adopted from an analysis provided in the CBI Fruit Report 2006

## **2.8 SWOT ANALYSIS**

### **2.8.1 Strengths**

- JEPA has begun to provide a number of value-added services to farmers and producers of vegetables and fruits in general, especially in the areas of organizing seminars and training courses, particularly in technical fields related to agricultural practices and operations of the technical aspects.
- Annual rainfall rates in addition to soil and climate characteristics in Jordan are suitable for expanding the cultivation of pomegranates.
- Minimal problems related to crop diseases such as bacterial blight or pomegranate wilt.
- Launching of the national campaign for the promotion and marketing of the Jordanian pomegranate prompted efforts on the national level to develop the marketing of pomegranate and has drawn attention to this product through the first and second pomegranate exhibitions and soliciting specialized experts in the cultivation and development of this crop.
- The National Center for Agricultural Research and Extension (NCARE) and JEPA are keeping open connections with the pomegranate farmers through the survey conducted in 2009 and working closely to develop this sector.
- Sufficient average production capacity rate per dunum in comparison with Iran and India.
- Jordanian pomegranates are well varied and has very good quality.

### **2.8.2 Weaknesses**

- Lack of in-depth marketing research on target export markets.
- Lack of practical experience in the field of marketing communications or media relations management. As a result of this, JEPA provides limited technical assistance to its members, as it does not have the expertise and sufficient qualified employees for this purpose.
- Lack of farmer oriented marketing training and capacity building programs.
- Lack of organized marketing systems for pomegranate.
- In addition, relevant entities working with Pomegranate production work in isolation from one another. These are the Ministry of Agriculture (MoA), the (NCARE), and JEPA. The flow of information between those three entities is found to be rather poor.

Having that said and given the absence of official communications channels across relevant stakeholders the only way information can spread is through informal channels/ways. This haphazard, uncontrolled and undirected flow of information effectively affects the promotion of pomegranate.

- Media activities are limited to providing intermittent coverage of formal annual exhibitions, and dignitary visits organized and conducted through JEPA. Media feeds are not collected nor reported.
- The role of JEPA in providing a link between the Jordanian farmers and exporters, distributors and importers in export markets is minimal.
- Domestic marketing for pomegranate is somewhat fragmented and not organized.
- Inadequate water available for irrigation and unavailability of adequate agricultural roads in some regions of Jordan.
- It seems that the Association is not well branded through the media. Media activities are conducted in a rather sporadic manner lacking sustainability in planning and implementation.
- Another weakness with regards to communications is attributed to the lack of designation of an official spokesperson of JEPA.
- Relatively high prices of production inputs such as organic and chemical fertilizers, water for irrigation, plowing and pruning costs leading to relatively high prices of Jordanian pomegranates in comparison with Iran, Turkey and India.
- Inadequate irrigation systems as only 14% of pomegranate farmers deploy drip irrigation whereas the remaining 86% use traditional irrigation methods such as surface channel irrigation and traditional immersion. This leads to problems of fruit cracking because of inadequacy of irrigation methods.
- Lack of grading facilities near the major production areas.
- Incapability to efficiently and regularly respond to the potential demand for mass production due to the limitations of pomegranate production capacity in Jordan compared to Turkey, Iran or India.

USA and EU customers (distributors and importers) look for reliable suppliers who can supply them on a regular basis at a good price with a constant quality. Jordanian exporters must therefore be able to supply at a constant level of quality and according to agreed specifications.

- Weakness of the marketing communications activities to relay the marketing message, which must target strategically-selected market segments, rather than the ones targeted now in a haphazard manner.
- Most pomegranate producers and farmers do not have access to internet because of technology limitations in their areas, as well as their computer illiteracy.
- There are no branding guidelines to manage the development of JEPA publications. Publications produced so far are conventional, and provide general information on JEPA's vision, mission, objectives and ongoing projects.

### 2.8.3 Opportunities

- Growing global demand for, and focus on, health-promoting products, including super fruits, tropical fruits and new exotic products. Pomegranate is widely considered an exotic in American, European and Middle East countries.
- Increasing out-of home consumption of fruit and vegetables in the restaurant and foodservice channels.
- There is scope for exporting Jordanian pomegranates to the GCC, Western Europe, USA, Canada, and Mexico. EU consumption of fresh fruit exceeds production by 13%<sup>15</sup>
- The opportunity to supply pomegranates to the main export markets during the off-season of the Spanish, Turkish, Iranian and Indian production.
- The opportunity to supply distinct innovative products in the major export markets, addressing key consumer demands such as health, wellness and enjoyment.
- The opportunity to strengthen and consolidate business relations with the associations and counterparts of JEPA in export markets, especially in EU, CEE, USA, Canada and GCC.
- The possibility of penetrating niche markets through introducing unique pomegranates-derived products of added-value and evident competitive advantage.
- The possible opportunity of nurturing demand in the local and regional market through working on increasing and enhancing the awareness of pomegranate benefits and introducing innovative pomegranate-derived products.
- There is a good potential for export of organic pomegranates especially to European countries, USA and Canada.

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<sup>15</sup> Source: CBI – Fresh Fruits and Vegetables Market Survey

#### **2.8.4 Threats (Challenges)**

- Certification requirements for fresh fruit and vegetables (GlobalGAP, formerly EurepGAP) and for processed fruit and vegetables<sup>1</sup> (GMP/HACCP/BRC), which involve serious managerial and technical efforts and high costs for Jordanian pomegranate farmers and exporters.
- These certification requirements are strictly required to gain access to north-American and north-western European countries and, increasingly, in the southern and western European countries.
- Control of supply chains by large multinationals in the main export markets who demand a high level of professionalism and large-scale supply.
- High demands by the major export markets (north-America and Europe) for consistent high quality, reliability of supply and food safety.
- In the main export markets for fruits in general such as the north-American and EU markets, there is an increased consolidation in the buyers' market increasing the buyers' power, driving producers to more cost-efficient and larger-scale production and making it more difficult for small-scale and new producers to break into the market;

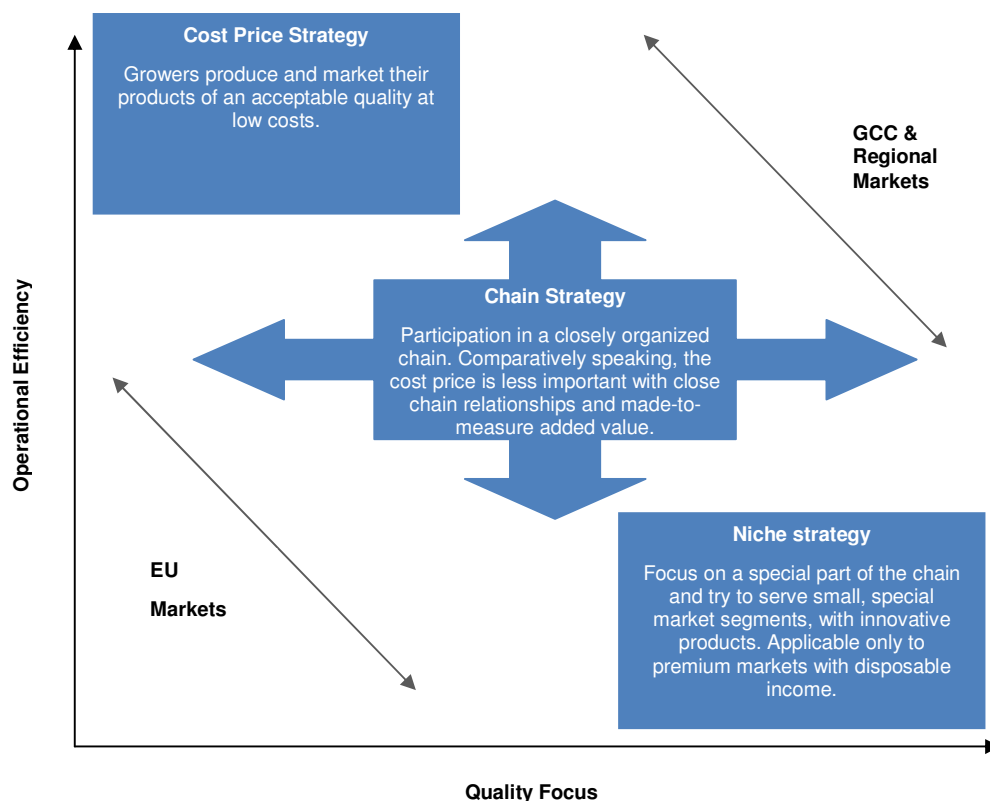
### **3.0 MARKETING AND COMMUNICATION PLAN**

#### **3.1 STRATEGIC POSITIONING**

In light of the research and analysis provided in this studies, and after looking at a similar case which is the Albanian pomegranates<sup>16</sup> and the Albanian trials to export to the EU markets, there are three broad strategies that can be drawn and used in targeting new horticultural markets. The following graph outlines the positioning options:

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<sup>16</sup> Adopted from the OTF Group, USA, report titled: "Pomegranates – Albanian Export Opportunities to Europe and the Region", 2007. Commissioned by AAC and DAI Albania.



The supermarket chains are becoming dominant and revolutionizing distribution in the fruit and vegetables industry. Even if not directly or selling via supermarkets, increasingly the effect of the multiples is being felt. The “Chain Strategy” is now taking over and encompassing elements of the other strategies, especially in the EU markets<sup>17</sup>.

Given the premium nature of pomegranates, Jordan should pursue opportunities based on quality and consumer preferences, and avoid competing on scale, cost or distribution channel efficiency, especially that Jordan cannot compete on scale because of production capacity constraints. Jordanian pomegranates should be positioned as “Holy land pomegranates – superfruits”, rather than being another crop exported by a developing country to the EU market. This can be achieved by maintaining close relationships with carefully selected distributors, importers and even large supermarkets, and avoiding competition over price or scale.

More than other high volume fruits, pomegranates have some distinct branding opportunities to capitalize on the premium niche potential. The health benefits offer the main marketing

<sup>17</sup> This positioning concept is Adopted from the OTF Group, USA, report titled: “Pomegranates – Albanian Export Opportunities to Europe and the Region”, 2007. Commissioned by AAC and DAI Albania.

opportunity. The New Zealand horticultural development group HortResearch has coined the phrase “superfruits” to refer to any novelty product, rich in antioxidants and health benefits, that is being heavily promoted at the consumer level in the US and EU markets. The American company POM Wonderful has increased sales dramatically by promoting the health benefits of their fresh pomegranate fruit and juice.

Pomegranates have high levels of anti-oxidants: “The latest in this line-up of trendy fruits include blueberries, cranberries, and pomegranates, with all three enjoying booming global sales as consumers jump on to the anti-oxidant bandwagon<sup>18</sup>”.

The following table summarizes the distinct opportunities and threats of a strategy focused on either the western EU markets, or on the local and regional GCC markets<sup>19</sup>:

Western EU Markets		Local Jordanian, CEE and Regional GCC Markets
Relatively higher average prices, possibility for niche products, pomegranates are increasing in popularity and consumption	<b>Product and Nice Potential</b>	No premium for exotic or specialty products, strategies will be more based on cost and quantity though some potential for premium and branding may exist in the medium to long terms
Standards are stricter: access is somewhat difficult, quality control and export compliance are difficult and demanding. Higher investments are required.	<b>Quality Control</b>	Quality standards are somewhat lower, access is more informal. Emergence of large supermarkets and chains in the region will change this situation in the short term.
Need for high quality in product and in packaging	<b>Packaging</b>	Less need for quality in packaging
Distribution is formalized, contracts are formal and relationships take time to build but once established are long term	<b>Distribution</b>	Distribution is less formal. Relationships are generally informal and more likely to fall apart.
Information (statistics, contact numbers, market information) is available from secondary sources but perception that information is limited/access is difficult	<b>Information</b>	Information is comparatively limited and difficult to developed

<sup>18</sup> EuroFruit Magazine “Obesity is the big issue for the fresh produce trade” at [www.eurofruitmagazine.com/files/archive-7.html](http://www.eurofruitmagazine.com/files/archive-7.html)

<sup>19</sup> Inspired from the OTF Group, USA, report titled: “Pomegranates – Albanian Export Opportunities to Europe and the Region”, 2007. Commissioned by AAC and DAI Albania.

### **3.2 MARKETING AND COMMUNICATION OBJECTIVES**

This plan outlines four broad goals for JEPA to achieve within the coming year 2010-2011. They represent the vision driving the communications work, and how JEPA will function with this regard.

#### **The marketing goals are:**

##### **1. Product:**

- Supporting farmers and producer in determining pomegranate variety mix production priorities
- Guiding farmers on the optimal periods for the production and export of Jordanian pomegranate.
- Enhancing the quality of Jordanian pomegranate produce.

##### **2. Promotion:**

- Enhancing the promotion of Jordanian pomegranate through (1) organizing an annual pomegranate festival in Amman and (2) supporting farmers in attending the main international fruit and vegetables exhibitions and fairs
- Setting an integrated marketing communications framework for JEPA to use in communicating the brand of Jordanian pomegranate (provided in the communication plan).

##### **3. Distribution:**

- Organizing an Annual Pomegranate Festival in Amman and the major cities of Jordan.
- Improving the distribution efficiency to the fruit and vegetables grocery stores and supermarkets in Amman and the major cities in Jordan.
- Enhancing the side-road outlets of Jordanian pomegranate.
- Assisting farmers and producers in distributing to the export market through establishing and maintaining relationships with importers and distributors in the main export markets.

#### **The communications goals are:**

1. Enhance communications within JEPA including the Board of Directors and staff;
2. Establish mechanisms to support communications;
3. Increase public understanding of the pomegranate sector and its potentials;
4. Establish mechanisms for stakeholders to access information from and about JEPA.



## **1. Enhance communications within JEPA including the Board of Directors and staff**

For JEPA to successfully achieve its goals across relevant stakeholders, it is important to keep the staff, Board of Directors, and members (current/potential) with up-to-date information about the Association. Furthermore, JEPA staff should be aware of the organization's vision, mission, objectives, and successes. Organizations with open and democratic cultures of two-way internal communications are more successful and productive than those without.

Internal communications informs employees of their role within the organization and how they can contribute to achieving the organization's goals. It therewith helps employees increase their efficiency and effectiveness resulting in a higher job satisfaction. Internal communications turns employees into the organization's strongest ambassadors, sharing first-hand with family members, friends and their communities the good work of JEPA.

Positive messages about JEPA's ongoing projects specifically with pomegranate production will focus information sent to farmers and potential investors in the sector. Moreover, focused messages are an efficient tool for minimizing gossip and rumors about the sector. It would make farmers perceive pomegranate production as an opportunity for investment and hence allow for growth in the production of pomegranate nationwide. In sum, communications will be enhanced within JEPA (vertical/horizontal) and across relevant entities.

## **2. Establish mechanisms to support communications**

JEPA must enhance communications within the organization and externally across relevant stakeholders. It needs to establish a new flow of information across members and pomegranate farmers to highlight JEPA's ongoing projects, market studies, participation in international exhibitions,. This flow of information shall also provide access to information on the interests of potential and existing traders, the advantages of new farming techniques the importance of the agricultural sector for the National GDP, in addition to the role of JEPA in influencing decision making in the agricultural sector.

Institutional capacity and ways to communicate effectively with key external audiences need to be established. Activities required would fall under a) institutional development, b) staffing, c) communications policy development, d) strategic planning, and e) opening up communication channels.

### **3. Increase public understanding of the pomegranate sector**

Jordanians across the board need to be aware of the status quo of the agricultural sector in Jordan specific to pomegranate production, and the role of JEPA in further enhancing the agricultural sector both on the strategic and implementation levels.

As with all audiences, when the public is informed about JEPA and its ongoing initiatives within the pomegranate sector positive messages, best practices, and future plans, more engagement and buy-in from the public will be achieved.

### **4. Establish mechanisms for stakeholders to access information from and about JEPA and the pomegranate sector**

The citizens of Jordan, farmers, investors, and relevant governmental ministries and organizations are entitled to know the status quo of the agricultural sector in Jordan namely the new potentials such as the pomegranate in order to promote Jordan as a good location for foreign investment.

JEPA needs to further build its institutional capacity with regards to communications, as well as guarantee a structured flow of information across relevant stakeholders' such as pomegranate farmers. Moreover, JEPA will develop ways for those farmers to request and receive information in a timely manner. This will enable a two-way communication, demonstrating openness and inclusion leading to an increased understanding and trust between targeted groups and JEPA.

## **3.2 MARKETING MIX STRATEGY**

### **3.2.1 Product**

**Time of export, choice of variety, quality maintenance and regulation of fruit size are important aspects in the production of pomegranate for export.**

JEPA can play an integral role in the development Jordanian pomegranate product strategy by supporting farmers and producers of pomegranate Jordan through four main pillars, namely:

#### **1. Supporting farmers and producer in determining pomegranate variety mix production priorities:**

Many types of pomegranates exist and not all are suitable for fresh consumption; some are preferred for juice and processing. For fresh suppliers, size and color are the most important attributes. The products that consumers are currently willing to pay higher prices for are large, red pomegranates. For Jordan to compete, it needs to ensure its products are in line with consumer preferences in terms of size, color and price point.

This can be achieved through the following:

- Building on the preliminary consumer product preferences provided in this study, both in the domestic market and export markets.
- Rely on the results of the upcoming study to be performed in by NCARE assessing the priorities for the production of many varieties of pomegranate in Jordan and matching the findings and results initial results of this study to ensure that production priorities Commodity pomegranate Jordan.
- Delivery of the preliminary results of this study and the intended results of the study conducted by NCARE to farmers through seminars and workshops to identify those results which enable farmers to identify the results of both studies and ways to take advantage of the priorities in the commodity mix of agricultural practices.

## **2. Guiding farmers on the optimal periods for the production and export of Jordanian pomegranate:**

In addition to the lack of supply even in the main producer seasons, there exists a counter season opportunity for the early summer in Western Europe, when the discrepancy between supply and demand is at its highest. Albania may not be placed to compete in this counter season, and strong commercial interests from new producers like South Africa with reverse seasons are best placed to capture this edge of the market. Because of the long shelf life, there is no location advantage associated with this fruit.

The most attractive markets for this niche product are the premium markets of the Western European markets are growing in demand and pay a premium for fresh pomegranates that meet consumer specifications. The UK is currently the largest market, but all countries outside of Spain, which meets its own demand, have potential for Jordan.

This can be achieved through the following:

- Providing acute market data on the seasonality of pomegranate production in competitor countries and the optimal demand period for pomegranate in the target export markets and rendering advice to farmers and exporters on market opportunities to exploit. Such data is available for JEPA through its Market Intelligence Unit (MIU) and can be provided to interested farmers and producers on periodical or on demand basis in order to increase market opportunities.
- Encouraging contractual agricultural production through opening communication channels between farmers, producers and exporters.

## **3. Enhancing the quality of Jordanian pomegranate produce:** the quality of pomegranate fruits can be measured through the following criteria:

The desirable fruit characters of fresh **Pomegranate for export purpose are:**

- Dark rose pink colour of the fruit.
- Fruit weight around 500 Gms.
- Round and globose shape of the fruit.
- Uniform size and shape of the fruit in a pack or box.
- Dark rose pink arils.
- Softness of the seeds.

- Higher sugar content near about 16-17 Brix.
- Free from scars, rosetting, disease spots, insect injury, scratches, etc.
- Smooth cutting at the stem end.
- Pleasant flavour and aroma
- Bracts/calyx without any damage and having freshness.

### **Packaging Requirements:**

Standard packaging for pomegranates include<sup>20</sup>:

- 2-layer tray pack.
- 1-layer Euro-Tray.
- Bulk bin
- RPC
- Club pack.

At a retail level, pomegranates are generally sold loose and priced by the piece or weight, as befits a premium fruit.

JEPA can play an integral role in enhancing the quality levels of the Jordanian pomegranate produce so that it can compete more successfully with the Turkish, Iranian, Azeri, Indian, Syrian and other competitor pomegranates. This can be achieved through the following:

- Paying more attention to agricultural research and studies in the area of pomegranate cultivation (in terms of targeted varieties, soil, drip irrigation, best agricultural management practices, etc.)
- Supporting NCARE in providing agricultural extension.
- Supporting pomegranate farmers in obtaining the required quality certifications: In order to maintain high quality levels and food safety standards, pomegranate farms in Jordan should be accredited with HACCP, GLOBALGAP, BRC and AVA.

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<sup>20</sup> Please note that this information is from the US market.

### 3.2.2 Price

Most countries producing pomegranate do so around the fall and early winter. This corresponds with the traditional season of high demand (the holidays) but as pomegranate consumption and demand is increasing, there exists a counter season opportunity to Western EU for the spring and early summer:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Jordan</b>												
Turkey												
Spain												
Israel												
Egypt												
USA												
Iran												
South Africa												
India												
Syria												
Peru												

Window of opportunity for sales to Western EU

Retail and production pricing information is splattered and hard to come by, but the pricing information shows the difference in prices paid in selected European markets in July last year:

Market	Origin	Local currency		Variety	Size	Pack	Transport	L-price	H-price
		L-price	H-price						
Belgium	Israel	2.57	2.57		12'				
Holland	India	3.88	4.43		10-12'				
Sweden	India	2.8	2.8		16'			27.2	27.2

Source: MNS Intracen Product Map, March 2010

### 3.2.3 Promotion

Promotion and marketing communications can play a key role in creating awareness over the health benefits of pomegranates and encourage consumers to purchase the fruit more frequently whether in the local, regional or international markets. The “Communications” strategy section of this report details the marketing communications strategic actions that JEPA can take in order to further promote Jordanian pomegranates locally, regionally and internationally, whereas the remaining of this section reviews the need for intensifying promotional efforts to organize a pomegranate exhibition day in Amman and attending the major international fruit and vegetables events and exhibitions.

#### ***3.2.3.1 Organizing a pomegranate exhibition/festival in Amman***

In the local market, it is important to raise the awareness of pomegranates in the minds of the average Jordanian consumer. One of the key promotional tools can be illustrated by the organization of a pomegranate exhibition in common with the first and second Jordanian Pomegranate Exhibition which was held in Irbid back in 2008 and 2009.

JEPA can play a very important role in organizing a similar exhibition day for Jordanian pomegranate in Amman. When interviewing selected pomegranate farmers, they stressed on the importance of moving the exhibition's location from Irbid to Amman in order to generate higher sales.

The marketing and communication action plan details the actions which JEPA can take in order to organize a pomegranate event in Amman.

#### ***3.2.3.2 Sponsoring attendance to international fruit exhibitions***

JEPA can also play a key role in creating awareness among pomegranate farmers and producers on the key international fruit and vegetables exhibitions and sponsoring interested and qualified Jordanian pomegranate producers. FRUIT LOGISTICA is the leading international meeting place of the fresh produce trade. including global players as well as small and medium-sized suppliers from all around the world.

For three whole days, FRUIT LOGISTICA provides:

- an across-the-board presence of top international exhibitors.
- an excellent platform for initiating business deals
- excellent opportunities for making worldwide business contacts
- a unique opportunity to gain a complete overview of the latest trends in the fresh produce business

In addition, there is the International Plant Expo Middle East (IPM DUBAI) and the World of Perishables (WOP Dubai) which are held in Dubai annually.

### 3.2.4 Place (Distribution Channels)

#### 3.2.4.1 *Distribution in the Local Market*

There are three main recommendations that can be taken into consideration to enhance the distribution of Jordanian pomegranate in the local Jordanian market:

1. **Organizing an Annual Pomegranate Festival in Amman and the major cities of Jordan:** as mentioned under the promotion section, the annual pomegranate exhibitions which were carried out successfully in 2008 and 2009, need to be organized and held on an annual basis and turn into an annual national festival for Jordanian pomegranate.

Such festival can be organized in such a way so that it takes place in the main cities of Jordan including Irbid, Zarqa and most importantly in Amman. This idea can be initiated by JEPA and arranged with Greater Amman Municipality to ensure a successful launch of a series of annual pomegranate festival in Amman. Such event should turn into a fixed, well-known fixture in the national calendar of events (in common with the Amman Summer Festival, for example) and it will undoubtedly help farmers and producers of pomegranates generate sizable sales and profits during the festival.

2. **Improving the distribution efficiency to the fruit and vegetables grocery stores and supermarkets in Amman and the major cities in Jordan:** in the local Jordanian market, distribution to retailers and main supermarkets in Amman is of very high importance to increase the domestic sales of Jordanian pomegranates. Research has shown that the average Jordanian consumer of pomegranate finds it difficult sometimes to even find pomegranates at the shelves of the main fruit and vegetable shops and supermarkets in Amman. Typically, most Jordanian consumers, particularly those who reside in Amman, purchase pomegranates during the pomegranate season from side-road sellers on the Jerash-Ajloun-Irbid highways, which can be inconvenient to many consumers. A more systematic distribution mechanism should be deployed to ensure that Jordanian pomegranates are available at the major fruit and vegetables shops, grocery stores, and supermarkets in Amman.

JEPA can play a very important role in improving the distribution to the outlets in Amman by conducting a survey-based research covering the major fruit and



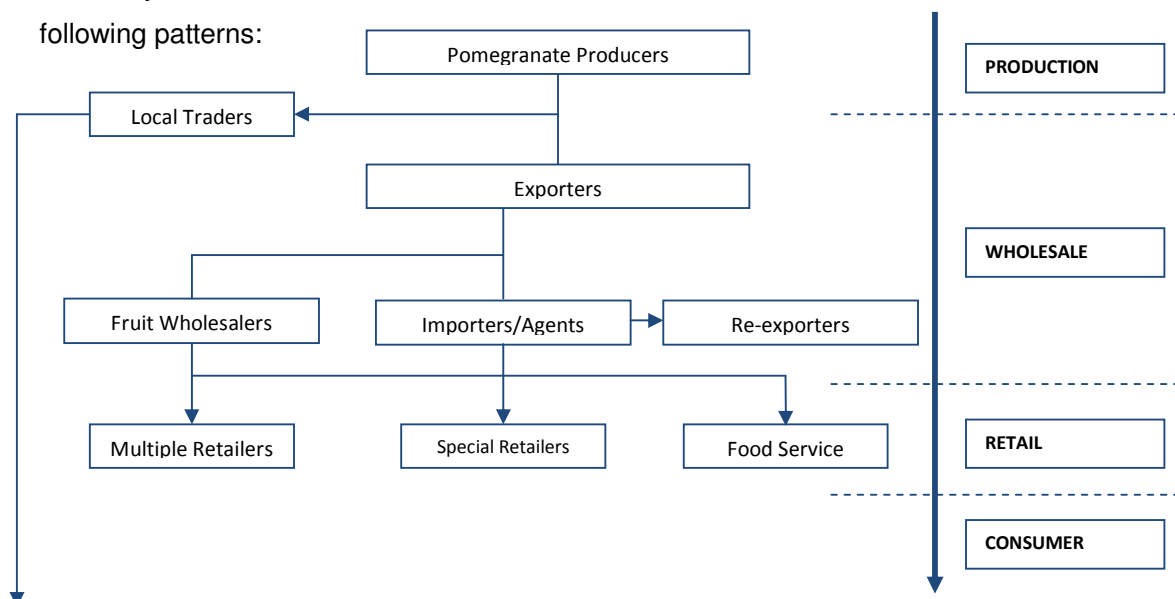
vegetables outlets, grocery stores and supermarkets in Amman, to figure out the most convenient way by which sellers prefer to receive the Jordanian pomegranate. The survey should also include the Amman Central Wholesale Market of Fruit and Vegetables to ask wholesalers questions examining the reasons why distribution of Jordanian pomegranate to retail fruit and vegetable outlets in Amman is rather weak. The said research should identify such distribution obstacles and come up with a systematic approach and workable solutions which JEPA can contribute to their implementation so as to improve the efficiency and effectiveness of domestic distribution of Jordanian pomegranates.

3. **Enhancing the side-road outlets of Jordanian pomegranate:** As mentioned earlier, many Jordanian consumers purchase their pomegranates from outlets that are splattered on the side-road of Amman, Jerash, Ajloun, Irbid highway. There are many outlets who benefit from their current locations during the pomegranate season who found to be generating considerable sales from their current side-road outlets. JEPA can work with the Irbid Wholesale Market of Fruit and Vegetables as well as with the local municipalities of Irbid and Jerash to improve and enhance the overall presentation and appropriateness of those outlets and provide them with tools and equipment that will make them become more organized to provide a more convenient selling experience to Jordanian buyers.

#### 3.2.4.2 *Distribution in the Export Markets*

##### **Distribution Channel Strategy Overview:**

Generally, the distribution channels in the US and EU markets for fresh fruit conform with the following patterns:



Wholesalers are increasingly large in scale, primarily due to buyer concentration which is leading to concentration at this stage of the value chain. For example, in a Dutch vegetable and fruit sector at least 500 wholesaling companies are in business. However, 2% of those companies control a market share of 25%, with an average turnover of about USD 36 million.

Wholesalers and importers are increasingly being squeezed by the rise of even more efficient retailers in the form of multiples/ supermarkets and at threat by the emergence of new distributions networks controlled with information technology. In general, there are strong tendencies towards concentration in the supply of fresh fruits and vegetables throughout the USA and EU, although the extent and progress vary by country. Nevertheless, smaller scale players do exist, primarily in the exotic and specialty fruit trade, such as pomegranate. Because of the premium nature of their products and the lower demands than “commodity” fruit, exotic fruit importers have less stringent requirements in terms of volume and frequency of delivery. However, these remain key considerations to be taken into account when developing the Jordanian pomegranate sector and preparing it for larger export operations to the US and EU markets.

### **Distribution Margins**

Margins in the business of fresh fruits and vegetables is very tight, typically less than 10%. The driver of profitability is scale. Even smaller scale specialty fruit importers, which represent a good first option of choice for Jordan to target to access the US and EU markets, typically report low margins. To avoid cost pressures, Jordan should focus on developing a quality product to command the highest prices and avoid competing on price.

The market for fresh fruits and vegetables in the EU is freer than other agricultural markets in the world. For most fruits and vegetables, nevertheless, import duties are payable, but for most developing countries these duties are waived. There no EU subsidies for the production of pomegranates – to help developing countries, and the EU developed a Generalized System of Preferences (GSP) to promote the sustainable development of trade with the developing countries, which Jordan forms a part.

JEPA can play a key role in making contacts of main importers and distributors, as well as major supermarkets in the EU, available to Jordanian producers of pomegranate and initiate relationships with them. Such contacts could also be invited to the annual pomegranate festival.

### **3.3 COMMUNICATION STRATEGY**

#### **Strategic Approach**

The strategic approach describes in broad strokes how JEPA will achieve its communications goals.

Furthermore, strategic planning for communications will be conducted on an annual basis. In April 2011, the strategic plan will be achieved and progress will be assessed to determine a fixed plan for implementation in the following year of 2012. This cycle will take place in April 2012 and so on.

#### **3.3.1 Institutional**

In (2010-2011), JEPA will focus on institutional building through: a) creating a Communications Department, b) developing protocols and procedures, c) determining mechanisms for interacting with relevant stakeholders including; existing and future members, the Ministry of Agriculture (MoA), (NCARE), and pomegranate farmers. The capacity building process will also focus on d) securing buy-in from leadership on its activities, and last but not least e) opening two-way communications channels within the organization.

#### **3.3.2 Public Education and Information**

The public education campaign will aim to promote understanding and general information on a) JEPA, and b) the pomegranate sector. In (2010-2011) the information is expected to be disseminated via radio spots and mainstream newspapers (online/offline), as well as mobile SMS messages. These types of media have broader access to targeted groups when compared to TV, while enjoying being more cost-effective. Nevertheless, the possibility of using TV in the campaign will be reconsidered if leveraging agreements are made with national television stations.

Furthermore, the awareness campaign will include a variety of outreach and public awareness activities. A few of these outreach activities are foreseen to take the form of a) door-to-door visits, b) organization of local festivals, and c) summer camps etc. The expected effect of such initiatives will not be restricted to awareness raising and entertainment, but will also include the celebration of common values and achievements creating therewith a source of pride for the community and the nation.

### **3.3.3 JEPA Website**

Further development in terms of layout and content management design will take place for the JEPA website in accordance with the guidelines of the newly developed branding and design protocols. Moreover, the website will be equipped with new services in order for the website to constitute an integrated portal for anyone interested in JEPA's work or Jordan's agricultural sector. Aside from the and e-news bulletin to be incorporated, other innovative sections to be added namely; a) 'Press Office', b) the 'Virtual Tour', c) 'Photo Gallery', as well as d)'Ask the Expert' interactive platform. Lastly, the website will be lined to social networking websites such as Twitter, Facebook, Linked In, and RSS services.

### **3.3.4 Evolving Digital Communications Channel**

JEPA and relevant stakeholders are gearing up to be technologically enabled. In this view, digital communications tools and channels will be enhanced to promote further understanding about JEPA and relevant projects via digital communications channels (i.e. JEPA/Pemojo on Wikipedia, Twitter, Facebook, and Official Blog, Linked In, and RSS services).

However, JEPA needs to facilitate technology in its outreach efforts to pomegranate farmers who have limited access to such technology. In this context, JEPA will develop help centers in the different regions and or use Mobile Units to enhance communications with the farmers for training, knowledge transfer, and announcements. Once this has been implemented JEPA can have access to receive feedback and comments in return.

### **3.3.5 Events and Exhibitions**

JEPA will further promote the Association in international participation across current members, and relevant entities for maximum participation, exposure and networking. In addition, JEPA will develop a leveraging and sponsorship schema to package its participation in a professional and attractive way based on international standards.

Further, JEPA in collaboration with MoA, (NCARE), and strategic partners from the private sector will organize and conduct the 2010 Pomegranate Exhibition in Amman for maximum exposure, networking, and promotion across relevant stakeholders namely pomegranate producers, private sector representatives, media, and the general public.

### **3.3.6 Media Relations**

JEPA will establish rapport and create connections with mainstream newspapers (online/offline), radio and TV channels. It will approach media channels in a systematic manner and work on sustaining working relations with media representative according to clear common understanding for cooperation, the tools for which will be developed.

For these purposes, a detailed Media Action Plan for 2010 (Annex I) has been developed illustrating cooperation efforts foreseen for JEPA and its partners in the media. Towards that end, JEPA will tailor specialized training programs for journalists in order to build their capacity. The training programs are foreseen to cover journalistic skills required for educating the public on matters related to Jordan's agricultural sector in general and best practices and relevant issues in specific.

### **3.3.7 Stakeholders Engagement**

Messages, materials and relevant promotional activities will be developed in collaboration with relevant stakeholders; namely JEPA members, pomegranate farmers, MoA, (NCARE), donors, and media representatives.

### **3.3.7 Messaging**

Messages are what people are left with once the communication is finished. Core messages/themes are developed that will appear across the board. As specific communications tools and activities are developed for specific target audiences, additional messages are developed to meet those communications needs. Every communications vehicle will carry these messages; explicitly at times, and implicitly at others. Clarity and appropriate repetition of messages is the key to a successful communications campaign.

### **3.3.8 Approach, Messages and Themes**

#### ***3.3.8.1 Approach***

Messaging will be broken down into three phases:

1. *informing (raising awareness of JEPA/Pomegranate sector);*
2. *persuading (building commitment by communicating benefits);*
3. *reinforcing (sustained communications for buy-in and further engagement).*

Messages focus on promoting a general understanding of JEPA, the pomegranate sector, benefits, and thereby convincing target audiences to participate and support such efforts. Accordingly, messages will be further developed to underpin the work completed in previous phases by continuing to emphasize achievements and benefits and using champions to endorse successes achieved.

In addition, the following messaging approach will be used across all communications vehicles.

- **Fact and figures.** Data will be identified that support JEPA's efforts. For example figures reflecting increase in JEPA membership, market studies and services produced, number of pomegranate farmers in the Kingdom.
- **Survey results.** Where appropriate, results from JEPA market surveys will be integrated into communications products.
- **Personal stories.** These are very effective promotional tools. Stories will be told about JEPA members and pomegranate farmers who benefited from the organization as well as the general public. They can be used across communications tools.
- **Success stories.** Like personal stories, these are very effective promotional tools that can be used in a variety of ways.
- **Holistic storytelling.** Pomegranate farmers talk about their concerns and frustrations. The approach will be not to pretend problems don't exist; but rather to identify the problem and actions taken for resolving them.

#### ***3.3.8.2 Messages and Themes***

Messaging about JEPA and the pomegranate sector will be coined in a positive manner; reflecting the benefits and advantages for Jordan's agricultural sector at large:

- Jordan Exporters and Producers Association for Fruit and Vegetables (JEPA) is a policy making entity with a mandate to further develop the horticultural sector in Jordan.
- JEPA aims at expanding its membership base as well as promoting the products of its members on the regional and international levels.
- Jordan's produce of pomegranate and its derivative products (such as juice, molasses etc) enjoy an internationally acclaimed quality capable of competing in the international market.
- 'Pomejo' is the brand name of Jordanian pomegranate of fine quality, meeting high demand in the international market.
- 'Pomejo' provides the future for investment in Jordan's agricultural sector.

- Investment in the Jordanian pomegranate production sector will contribute to the national GDP and fuel socio-economic development in Jordan.
- Jordanian horticultural products are recognized by international buyers from both the European and North American markets.

The following table summarizes the approach for communicating to target audiences.

Target Audience	Actions They Should Take	Basic Messages	Proposed Channels
<b>JEPA:</b> Board of Directors, members (existing/potential)	<ul style="list-style-type: none"> <li>Develop and promote understanding of JEPA's vision, mission and objectives. In addition to priorities and initiatives on the short and long terms.</li> <li>Enhance communications within JEPA and membership network (existing/potential)</li> <li>Build the capacity of the Communications Department at JEPA to further promote the Association.</li> <li>Act as ambassadors of JEPA</li> </ul>	<ul style="list-style-type: none"> <li>JEPA is a non governmental organization established to promote better policies in the agricultural sector.</li> <li>JEPA provides technical support to pomegranate farmers by promoting best practices in this sector</li> <li>JEPA is a bridge linking national investments in the fruit and vegetable sectors with international markets namely Europe and USA</li> <li>JEPA membership network is a tool to focus national priorities and talents in the field of growing fruit and vegetables in Jordan.</li> </ul>	<ul style="list-style-type: none"> <li>Staff meetings and presentations</li> <li>e-news bulletin</li> <li>Mobile SMS messages</li> <li>User friendly website</li> <li>Bulletin boards</li> <li>Awareness workshops</li> <li>Leaflets</li> <li>Development of publications (i.e. annual report, market studies)</li> <li>Newspapers advertisements</li> </ul>
<b>Policymakers:</b> Minister of Agriculture, Secretary General, relevant ministers and officials	<ul style="list-style-type: none"> <li>Establish channels of communications with MoA and sustain openness and feedback regarding JEPA projects and future plans.</li> <li>Provide information regarding the fruit and vegetables market, status quo, challenges and opportunities.</li> <li>Adopt new policies and legislation to support further development of the pomegranate sector</li> <li>Share JEPA efforts within their institutions and other external audiences</li> </ul>	<ul style="list-style-type: none"> <li>JEPA successes, and achievements so far</li> <li>The role of MoA and relevant entities in supporting JEPA's efforts and why it is important</li> <li>Jordan ranks as a potential market for exporting fruit and vegetables, particularly pomegranate</li> </ul>	<ul style="list-style-type: none"> <li>Briefings and presentations</li> <li>External newsletter</li> <li>Website</li> <li>Conferences</li> <li>Lobbying with influential groups</li> <li>Factsheets</li> <li>Media outreach</li> <li>Ministerial field tours</li> </ul>
<b>NCARE</b>	<ul style="list-style-type: none"> <li>Further enhance</li> </ul>	<ul style="list-style-type: none"> <li>NCARE, MoA, and JEPA</li> </ul>	<ul style="list-style-type: none"> <li>Awareness workshops</li> </ul>



	<p>communications between the Center, MoA, and JEPA.</p> <ul style="list-style-type: none"> <li>• Jointly develop an Action Plan to promote new agricultural projects such as the pomegranate</li> <li>• Conduct joint workshops, field training programs, and exhibitions.</li> <li>• Organize and implement the 2010 Pomegranate Exhibition in collaboration with MoA and JEPA.</li> </ul>	<p>are partners working to enhance the market potentials of fruit and vegetables in Jordan and worldwide.</p> <ul style="list-style-type: none"> <li>• Pomegranate growing has high potential in Jordan with international demand.</li> <li>• The Center in collaboration with JEPA promote understating about the benefits of pomegranate production, potentials, and best practices.</li> </ul>	<ul style="list-style-type: none"> <li>• Field trips</li> <li>• Pomegranate producers network</li> <li>• Pomegranate Annual Exhibition</li> <li>• Regional help desks</li> <li>• JEPA Mobile Units</li> </ul>
<b>Pomegranate Farmers</b>	<ul style="list-style-type: none"> <li>• Dedicate a % of JEPA membership fees for pomegranate farmers at attractive rates.</li> <li>• JEPA needs to develop a pricing strategy, and market study of the pomegranate, since a) production is not coordinated with authorities, and b) prices are not subjected to certain criteria.</li> <li>• Provide sponsorship to pomegranate farmers for participation in international exhibitions.</li> <li>• Promote understanding about the role of JEPA in further developing the sector both on the strategic and implementation levels.</li> <li>• Provide farmers with up-to-date information about the pomegranate sector.</li> <li>• Allow feedback and discussions between JEPA, MoA, and NCARE</li> </ul>	<ul style="list-style-type: none"> <li>• Pomegranate can be grown in all regions of Jordan..</li> <li>• There is a considerable demand on pomegranate in Europe.</li> <li>• Jordan's competitive advantages lays in the fact, that not all countries enjoy the appropriate climate for pomegranate production..</li> <li>• All pomegranate produce can be promoted and used.</li> <li>• Jordanian producers are more familiar now with pomegranate farming and international market needs.</li> <li>• No chemicals are used in pomegranate production in Jordan, providing an opportunity for penetrating the organic niche market.</li> <li>• Jordanian grown pomegranate enjoy: <ul style="list-style-type: none"> <li>- Pomegranates trees can bear fruit up to 50 years.</li> <li>- Produce can be harvested during a season 4 months</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Provide media coverage of the pomegranate sector (i.e. press releases, press conferences, media tours, interviews with farmers, TV interviews in popular shows such as Yawm Jadid, Yes'ed Sabahak, 60 minutes, radio talk shows such as Al- Wakeel).</li> <li>• Media campaigns regarding the benefits of pomegranate.</li> <li>• Conduct marketing and exhibitions protocols training programs to farmers</li> <li>• Scientific seminars</li> <li>• Field trips.</li> <li>• JEPA Mobile Units.</li> <li>• Mobile SMS messages.</li> <li>• International exhibitions and awards programs.</li> </ul>

	<ul style="list-style-type: none"> <li>for further investments.</li> <li>• JEPA in collaboration with relevant entities would develop and implement Action Plans to overcome current challenges facing pomegranate farmers'; namely proper infrastructure such as roads and water accessibility.</li> </ul>	<p>in Jordan.</p> <ul style="list-style-type: none"> <li>- Jordan grows a variety of types of pomegranate</li> <li>• 2 exhibitions were organized in Irbid in the 2008 and 2009:</li> <li>- 30 farmers' participated in the 1st exhibition with \$ 41,000 of sales.</li> <li>- 100 farmers participated in the 2009 exhibition with 77,000 JDs of sales.</li> <li>- Future exhibitions will be conducted in other locations for more exposure and networking.</li> <li>- Upcoming exhibitions will be held in London and Amman simultaneously.</li> </ul>	
<p><b>Media Outlets:</b> Mainstream newspapers (online/offline), Radio, tv (national, regional, international), social networking</p>	<ul style="list-style-type: none"> <li>• JEPA needs to establish a strong media network on the national, regional, and international levels.</li> <li>• Develop a Media Action Plan, with key messages and expected outcomes, and performance indicators</li> <li>• Conduct joint media tours, and press conferences in collaboration with NCARE and the MoA</li> <li>• Publish up-to-date information on JEPA website for media to use.</li> <li>• Publish media coverage of JEPA and ongoing projects on the website and disseminate through e-news bulletin</li> <li>• Conduct one-on-one</li> </ul>	<ul style="list-style-type: none"> <li>• The role of JEPA is to develop relevant policies for the benefit of the fruit and vegetables sectors in Jordan.</li> <li>• Pomegranate production is promising in Jordan and would provide international opportunities on the medium and long terms</li> <li>• JEPA recognizes the role of media in further promoting the role of JEPA in the agricultural sector and pomegranate production</li> <li>• Media is essential to further promote and educate farmers and the general public about the benefits of pomegranate production</li> </ul>	<ul style="list-style-type: none"> <li>• Press releases</li> <li>• Press conferences</li> <li>• Media tours</li> <li>• Field interviews</li> <li>• Roundtable discussions</li> <li>• Presentations</li> <li>• One-on-one interviews</li> <li>• Radio spots</li> <li>• TV shows</li> <li>• JEPA on Twitter, official Blog</li> <li>• Educational articles on pomegranate production in newspapers</li> <li>• Pomegranate Qs &amp; As newspaper competition</li> <li>• Guerilla Campaign (i.e. events, ads on buses, postcard mailing, borrow a wall/building for</li> </ul>

	<p>interviews with pomegranate farmers and officials via newspapers, TV programs, and radio</p> <ul style="list-style-type: none"> <li>• JEPA Wikipedia page</li> </ul>	<p>and highlight concerns and challenges for action from policy makers.</p> <ul style="list-style-type: none"> <li>• Social networking will open new doors for JEPA to promote its policies, ongoing projects and new potentials.</li> </ul>	<p>advertisement, personalize pomegranate candy with JEPA logo or <i>Pomejo</i>)</p>
General public	<ul style="list-style-type: none"> <li>• Understand what JEPA is doing and potentials in the pomegranate sector</li> </ul>	<ul style="list-style-type: none"> <li>• Citizens have role in promoting positive aspects of the Jordanian agricultural scene</li> <li>• JEPA is an accountable entity working to further enhance relevant policies and projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Public Education Campaign</li> <li>• Website</li> <li>• Media outreach</li> <li>• Door to Door visits</li> <li>• Community based practices</li> <li>• Community festivals</li> <li>• Success stories</li> </ul>

### 3.5 MARKETING AND COMMUNICATION ACTION PLAN

Initiative	Targeted Group	Time-frame	Suggested Budget (JD)	Performance Indicators
<b>1. <u>JEPA Website:</u></b> a. Assess current website and further develop structure and content. b. Develop the layout and technical structure of the website interface (Arabic/English). Main features of the website will include but are not limited to: a. A storyboard developed in an animated format. b. E-news bulletin. The e*news bulletin will be developed on weekly basis and would include up-to-date information on JEPA, technical matters, Action Plan, and testimonials from JEPA members and pomegranate farmers. c. "Ask the Expert" feedback tool to help members/farmers send their comments and or concerns to JEPA with a (30-60) minute period to receive support.	<ul style="list-style-type: none"> <li>• JEPA members</li> <li>• International buyers</li> <li>• Private sector</li> <li>• Media</li> <li>• General public</li> </ul>	April-May 2010	<ul style="list-style-type: none"> <li>• 8,000-10,000</li> </ul>	<ul style="list-style-type: none"> <li>• Website launched officially on the internet</li> <li>• # of hits on the website on monthly basis</li> <li>• % of feedback received on the website</li> <li>• # of e*news bulletins developed and distributed on weekly basis</li> <li>• # of email shots distributed</li> <li>• # of members joining the mailing list of the website</li> <li>• % of updated information on the website</li> <li>• % of increased membership in JEPA</li> </ul>
<b>2. <u>JEPA Multi Media Presentation:</u></b> a. Develop a multi media flash presentation and or a documentary regarding JEPA with a section on pomegranate production. This tool will be used in awareness workshops, and or media activities namely TV.	<ul style="list-style-type: none"> <li>• JEPA members</li> <li>• Pomegranate producers</li> <li>• MoA, NCARE</li> <li>• International Exhibitions</li> <li>• Media</li> <li>• General Public</li> </ul>	April 2010	<ul style="list-style-type: none"> <li>• 6,000</li> </ul>	<ul style="list-style-type: none"> <li>• % of increased membership in JEPA</li> <li>• # of public presentations made.</li> <li>• % of public awareness regarding JEPA and pomegranate production among targeted groups.</li> </ul>
<b>3. <u>JEPA Tool Kit:</u></b> a. JEPA Tool Kit will include information required about JEPA across relevant stakeholders, namely a) farmers and b) potential members. The information will be color coded and included in an attractive	<ul style="list-style-type: none"> <li>• JEPA</li> <li>• Pomegranate producers</li> <li>• MoA, NCARE</li> </ul>	May-June 2010	<ul style="list-style-type: none"> <li>• 10,000</li> </ul>	<ul style="list-style-type: none"> <li>• % of increased membership in JEPA</li> <li>• # of tool sheets developed.</li> <li>• # of tool kits produced and disseminated.</li> </ul>

<p>packages that is user friendly and accessible to end users (print/electronic):</p> <ol style="list-style-type: none"> <li>Brief on JEPA (i.e. vision, mission, objectives, ongoing projects)</li> <li>Fact sheets</li> <li>Calendar of events</li> <li>Products Atlas</li> <li>Best practices for pomegranate production</li> <li>Mailing list of international exhibitions and buyers.</li> </ol>	<ul style="list-style-type: none"> <li>Council of Ministry of Planning</li> <li>Ministry of Water and Irrigation</li> <li>Higher Council for Science and Technology</li> <li>Faculties of Agriculture / Jordanian Universities</li> <li>Private sector</li> <li>International Exhibitions</li> <li>Media</li> <li>General Public</li> </ul>			
<p><b>4. JEPA Mobile Unites:</b></p> <ol style="list-style-type: none"> <li>JEPA will operate on the governorate level to enhance outreach activities through Mobile Unites. The Mobile Units will tour potential farming locations and provide proper training to targeted groups.</li> </ol>	<ul style="list-style-type: none"> <li>Farmers and potential investors in pomegranate and other fruit and vegetables namely in rural areas</li> <li>MoA, NCARE</li> <li>Media</li> <li>General Public</li> </ul>	May-July 2010	<ul style="list-style-type: none"> <li>TBD</li> </ul>	<ul style="list-style-type: none"> <li># of units mobilized for this activity</li> <li># of field meetings and training conducted.</li> <li>% of buy-in and engagement of local communities and farmers in producing pomegranate</li> <li>% of increased membership in JEPA</li> <li>% of support on the decision making and the general public at large.</li> </ul>
<p><b>5. JEPA Educational Campaign:</b></p> <ol style="list-style-type: none"> <li>Announce JEPA educational and public awareness campaign. During the campaign:</li> <li>Promote understanding of JEPA services and policies</li> <li>Promote ongoing projects namely the pomegranate production</li> <li>Factual and statistical advertisement in newspapers</li> <li>JEPA Hotline service will be established and launched for feedback and technical assistance to members and farmers.</li> <li>Provide "Ask the Expert Service" through the JEPA</li> </ol>	<ul style="list-style-type: none"> <li>JEPA/ Members</li> <li>Pomegranate producers</li> <li>MOA, NCARE</li> <li>International Exhibitions</li> <li>Private sector</li> <li>Media</li> <li>General Public</li> </ul>	June-August 2010	<ul style="list-style-type: none"> <li>20,000</li> </ul>	<ul style="list-style-type: none"> <li>% of media coverage on the launch</li> <li># of tool kits disseminated</li> <li># of giveaways distributed</li> <li>% of buy-in from farmers</li> <li># of JEPA emails established and activated</li> <li># of "Awards of the Month" activities conducted</li> <li># of "Teaching by Learning" workshops conducted</li> <li># of email shots and or news bulletin</li> </ul>

<p>website.</p> <p>g. Create emails to members (i.e. <a href="mailto:name_of_member@JEPA.com.jo">name_of_member@JEPA.com.jo</a>)</p> <p>h. Conduct "Award of the Month" for distinguished members and or farmers based on performance criteria.</p> <p>i. Promote "Teach by Learning" workshops where farmers and or representatives from NCARE will present every other week technical matters of pomegranate production and best practices. The outcomes of these workshops will be published on the website under the 'Help Service' and distributed via email shots. In addition to printing them on leaflets and distributing them among farmers.</p>				<p>distributed.</p> <ul style="list-style-type: none"> <li>% of increased membership in JEPA</li> </ul>
<p><b>6. <u>Assign Focal Points for Communications in relevant entities:</u></b></p> <p>a. Develop positions, titles, and suggested scopes of work, and qualifications for potential focal points for communications issues in JEPA, MoA, (NCARE), and relevant entities.</p> <p>b. Assign focal points and provide training on ways and means to enhance communications on JEPA and pomegranate sector.</p> <p>c. Develop relevant protocols</p>	<ul style="list-style-type: none"> <li>JEPA/ Members</li> <li>Pomegranate producers</li> <li>MOA, NCARE</li> <li>International Exhibitions</li> <li>Private sector</li> <li>Media</li> <li>General Public</li> </ul>	May 2010	<ul style="list-style-type: none"> <li>2,000</li> </ul>	<ul style="list-style-type: none"> <li>#of focal points assigned</li> <li># of success stories developed and published</li> <li># of workshops conducted</li> <li>% of buy-in achieved through the focal points</li> </ul>
<p><b>7. <u>Workshops and on the field training:</u></b></p> <p>a. Pomegranate farmers will receive training programs on pomegranate production, developing farming and irrigation techniques, developing budgets, and pricing plans. Training programs will aim at building the capacity of farmers to overcome challenges and utilize opportunities.</p>	<ul style="list-style-type: none"> <li>Pomegranate farmers and producers</li> <li>JEPA</li> <li>MoA</li> <li>NCARE</li> <li>Media</li> </ul>	Ongoing	<ul style="list-style-type: none"> <li>TBD</li> </ul>	<ul style="list-style-type: none"> <li># of training programs conducted</li> <li>% of buy-in and support received from pomegranate producers</li> <li># of budgets and pricing plans developed.</li> <li>% of increased membership in JEPA</li> </ul>
<p><b>8. <u>Media Activities:</u></b></p> <p>a. JEPA will develop a Media Action Plan that includes press releases development, press conferences, media tours, and briefings, meetings with opinion writers, success stories, and interviews.</p> <p>b. Launch JEPA educational awareness campaign</p> <p>c. Launch the 4th Pomegranate Exhibition</p>	<ul style="list-style-type: none"> <li>JEPA/ Members</li> <li>Pomegranate producers</li> <li>MOA, NCARE</li> <li>International Exhibitions</li> <li>Media</li> <li>General Public</li> </ul>	<ul style="list-style-type: none"> <li>April – Dec. 2010</li> </ul>	<ul style="list-style-type: none"> <li>5,000</li> </ul>	<ul style="list-style-type: none"> <li>% of media coverage</li> <li># of op-eds published</li> <li># of press items published</li> <li>% of public engagement with the JEPA news via feedback tools (i.e. contact us on the JEPA website, letters to the editors of newspapers, TV and radio follow up stories)</li> </ul>

				<ul style="list-style-type: none"> <li>% of increased membership in JEPA</li> </ul>
<b>9. <u>Guerilla Campaign</u></b> The campaign will include but is not limited to: <ol style="list-style-type: none"> <li>Events</li> <li>Ads on buses</li> <li>Postcard mailing</li> <li>Borrow a wall/building for advertisement</li> <li>Personalize pomegranate candy with JEPA logo or <i>Pomejo</i> in collaboration/sponsorship of the private sector</li> </ol>	<ul style="list-style-type: none"> <li>JEPA/ Members</li> <li>Pomegranate producers</li> <li>MOA, NCARE</li> <li>International Exhibitions</li> <li>Media</li> <li>General Public</li> </ul>	<ul style="list-style-type: none"> <li>Augt-Sep. 2010</li> </ul>	<ul style="list-style-type: none"> <li>20,000</li> </ul>	<ul style="list-style-type: none"> <li>% of increased membership in JEPA</li> <li>% of public awareness and engagement with projects of JEPA namely pomegranate farming.</li> <li>% of media coverage regarding JEPA and pomegranate farming</li> </ul>
<b>10. <u>Twitter &amp; Success stories:</u></b> <ol style="list-style-type: none"> <li>Develop success stories from farmers and publish in the format of press items in both Arabic and English and publish on the <b>JEPA Twitter</b> page.</li> </ol>	<ul style="list-style-type: none"> <li>JEPA/ Members</li> <li>Pomegranate producers</li> <li>MOA, NCARE</li> <li>International Exhibitions</li> <li>Media</li> <li>General Public</li> </ul>	<ul style="list-style-type: none"> <li>Cont.</li> </ul>	<ul style="list-style-type: none"> <li>2,500</li> </ul>	<ul style="list-style-type: none"> <li># of press items published on Twitter</li> <li>% of increased membership in JEPA</li> </ul>

## 4.0 MONITORING AND EVALUATION CONTROLS

Listening to audiences' responses to the communications messages and activities will come informally, and formally. Informally, JEPA staff needs to pay attention to and illicit feedback and direct it to the communications team, who in turn will use it to adapt messages and tools. Formal mechanisms have also been identified below to collect opinions from audiences. Again, the Communications Department will develop mechanisms to share and react to the feedback.

### A. Collecting Target Audience Feedback

#### 1. JEPA Website

- **Polls & Votes.** This section will include questions regarding the performance of JEPA and specific questions on JEPA, and relevant stakeholders. Results will be analyzed.
- **Contact Us.** This section will include an email address for the general public and other website visitors to engage with JEPA.
- **Discussion Forum & "Ask the Expert".** As the website is further developed, it will include an interactive discussion forum to gather information and feedback.

#### 2. Awareness Workshops

In such activities, questionnaires regarding JEPA communications efforts will be disseminated among invitees for feedback and comments.

#### 3. Press Clipping Reports to JEPA

On a regular basis, the Department will provide documentation of press clippings and analysis.

### B. Public Awareness and Education

- Focus groups with JEPA (BoD) and staff.
- Media monitoring conducted by the Department will identify if there has been an increase in reporting on JEPA and the pomegranate sector. In addition, it will assess the quality of the reporting.
- The media who were interviewed for the development of this plan will be re-interviewed. Changes will be assessed.
- Reports on website will offer a wealth of information. Feedback and 'contact us' and 'polls' can be used to assess knowledge, trends and attitudes.



### **C. Operational**

The following performance indicators were identified for the year 2010:

1. JEPA Communications Department has established systems and policies, and staff is hired.
2. JEPA has established protocol for policy, messaging and data coordination.
3. The Department staff has been trained and a team building event has been organized
4. Awareness workshops at JEPA and in the governorates with pomegranate farmers.
5. JEPA website re-designed and launched.
6. Two issues of the external newsletter issued.
7. At least six issues of e-news bulletin issued.
8. Q&A sheets produced about JEPA (manual/electronic)
9. JEPA/ Pomegranate brochure produced and distributed.
10. General brochure on JEPA produced and distributed.
11. Public education campaign launched by a press conference.
12. Posters printed and distributed across stakeholders.
13. Pilot project on school visits to the farms organized.
14. Media list created.
15. Meetings with chief editors conducted
16. At least two media briefings/press conferences organized.
17. Media monitoring system in place: clipping report distributed to relevant parties.
18. At least (2) Mobile Units operating in the field
19. Annual Pomegranate Exhibition held in Amman
20. JEPA participate in at least two international exhibitions
21. Number of participants in the Potentate Exhibition
22. Number of mobile SMS messages distributed across farmers
23. Number of leaflets distributed across farmers

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