



PALTRADE

مركز التجارة الفلسطيني - بال تريد
PALESTINE TRADE CENTER

Gaza Strip Crossings Annual Monitoring Report

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GLOSSARY:

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

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

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

PERFORMANCE SUMMARY

CROSSINGS SUMMARY

During the past year (October 2009 – September 2010), imports marked a total of 34,250 truckloads of commercial and humanitarian freight entered into Gaza. Import volumes have been between 19% and 41% of the pre-closure levels. The large majority of these truckloads were food and animal feed (75%) and (17%) of these truckloads were designated for humanitarian aid agencies. Consumer items continue to make the majority of imported goods. However, entry of new items continues including private cars, car tires, woodworking and sesame machines which were allowed entry in September 2010 for the first time since June 2007.

Notwithstanding the new Israeli policies in Gaza, Israel still bans exports from Gaza (to the West Bank, Israel and the rest of the world) causing the scale of economic activity to remain heavily dependant on domestic demand. Therefore, the ban is indirectly and negatively affect the economic activity taking into consideration that the domestic demand is constrained by the low purchasing power of the population and the relatively small size of the local market.

Al Montar Crossing Conveyer Belt was open for 98 days (about 32% of the scheduled days of operation) and processed imports of 8,106 commercial truckloads of wheat and animal feed (14 % of total imports).

Karem Abu Salem Crossing was open for 247days (about 81% of scheduled days of operation) and processed imports of 26,144 truckloads, primarily consisting of consumer items.

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

Fuel Movement during this period, Nahal Oz Entry Point was totally shut down and fuel transfer to Gaza Strip has been shifted to Karem Abu Salem Crossing. Cooking gas imports were only around **56%** of average needs while industrial gasoline imports for the Gaza Power Plant (GPP) were only around **66%** of average needs during this period. For more information, see Fuel Import Performance in page 6 of this report.

Egyptian petrol and diesel, which are transferred through the tunnels under the Gaza-Egypt border, remain available on the open market with nearly 100,000 lit of diesel and 100,000 lit of petrol are being transferred into Gaza per day. There were no reports of cooking gas being piped through the tunnels

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

SECTION 1: CROSSINGS' PERFORMANCE

A CROSSINGS' OPERATIONS

A- Gaza Crossings performance

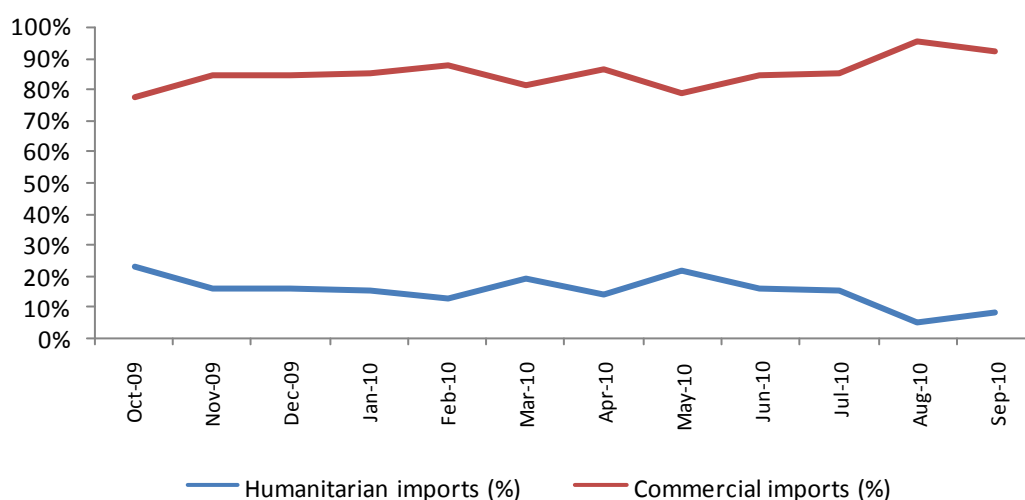
Al Montar Crossing was opened for 98 days and Karem Abu Salem was opened for 247 days. Table 1 below presents the operating days and cargo movements during October 2009 - September 2010.

Table (1): Summary of Crossings' Performance during Oct., 2009 - Sep., 2010.

	AlMontar	Karam abu Salem
Scheduled days for operations	305	305
Scheduled closure days ¹	62	62
Unscheduled closure days ²	201	55
Actual days for operation	98	247
Total exports (truckloads)	0	116
Total imports (truckloads)	8106	26144
Humanitarian imports (%)	2%	15%
Commercial imports (%)	98%	85%
Average daily import volume (truckloads) when open	83	106
Average daily import volume (truckloads) for all days scheduled for operations	27	86

A total of 34,250 truckloads of imported goods entered into Gaza. 5823 truckloads (17%) were designated for aid agencies during period.

Figure (1) Commercial Imports vs. Humanitarian Imports during October 2009 - September 2010



¹ Crossings were closed on Saturdays and holidays and during Islamic and Jewish holidays.

² Karem Abu Salem was closed for security reasons and Al Montar was closed for unknown reasons

SECTION 1: CROSSINGS' PERFORMANCE continued

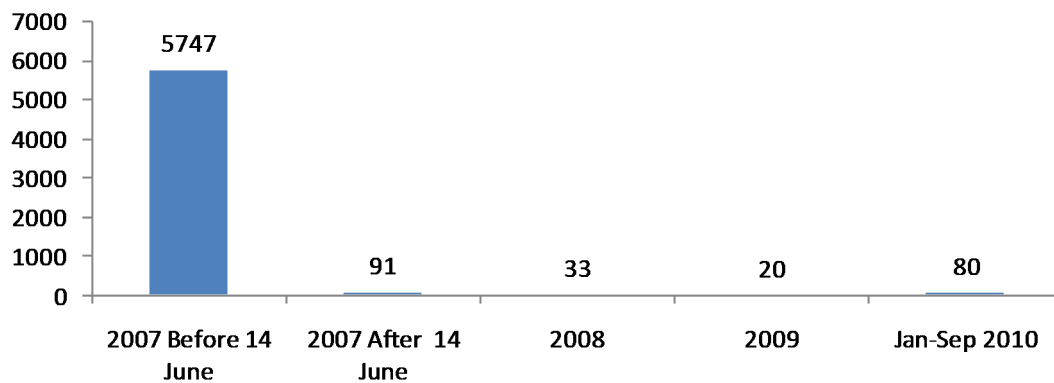
B CARGO ACTIVITY**B.1- Export Activity**

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

Despite relaxing the restrictions on imports, allowing the exports will certainly remain the major challenge that the private sector will ever experience, as the sector has been coping with this challenge since mid June 2007. Lifting all the restrictions on the exports will have a positive impact on the private sector. However, the capacity, infrastructure, and equipment of Karem Abu Salem/Kerem Shalom Crossing, the current main operating crossing, urgently needs to be improved in order to secure efficient and safe crossing of large quantities of goods including perishable crops. Without upgrading Karem Abu Salem, exporting agricultural crops will become unfeasible.

See figure 2 for the annual export trends from June, 2007 -September, 2010

Figure (2): Total Annual Export Volume (by truckloads)



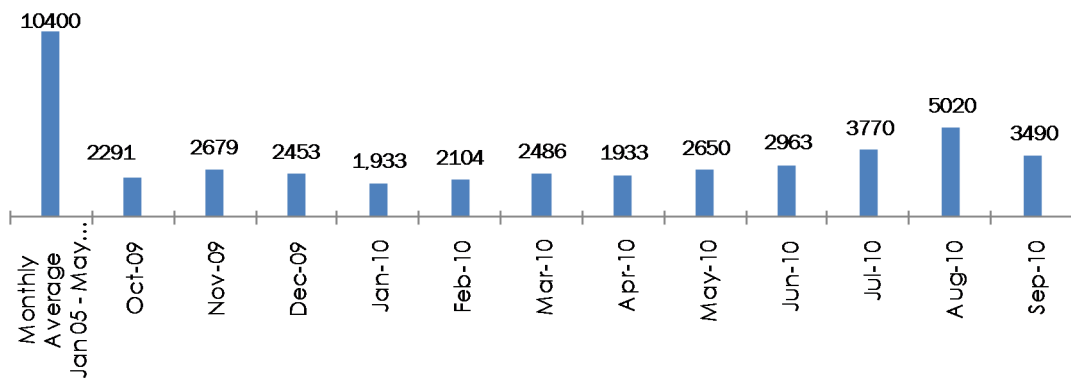
SECTION 1: CROSSINGS' PERFORMANCE continued

B CARGO ACTIVITY continued

B.2- Import Activity

A total of 34,250 truckloads entered into the Gaza Strip during this period (8,106 truckloads through Al Montar and 26144 truckloads through Kerem shalom). Since June 2007, import volumes have been between 19% and 41% of the pre-closure levels (see Figure 3). Although the volume and variety of imports have increased after the new Israeli policies in Gaza since June 20, 2010, imports volume is still representing 41% of monthly average of truckloads that entered into Gaza before the imposition of the blockade in 2007.

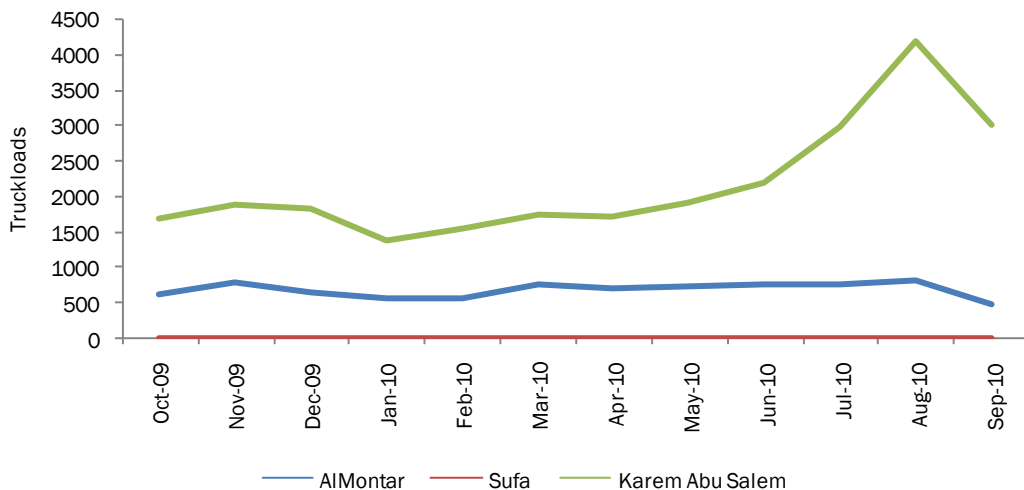
Figure (3): Imports into Gaza from Oct., 2009 – Sep., 2010 vs. Monthly Average before the imposition of the blockade (truckloads)



B.3- Crossings Operations Trends

Figure 4 below presents the trend of import volumes for each crossing. The figure clearly shows the drop in imports, and the major shift in operations from AlMontar to Karem Abu Salem Crossing.

Figure (4) : Operation Trends



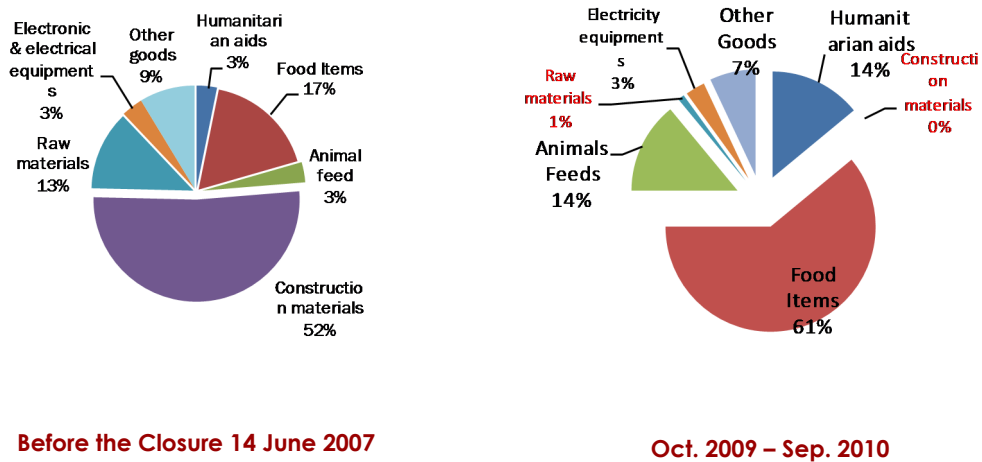
SECTION 1: CROSSINGS' PERFORMANCE continued

B CARGO ACTIVITY continued

B.3– Import Types

Since June 14, 2007, import volumes have been between 2% and 41% of pre-closure levels. As can be seen in the pie charts below (figure 5), humanitarian aid increased from 3% (pre closure) to 14%. In contrast, *construction and raw materials decreased from 65% (pre closure) to 1% during this period. Consequently, the lack of imported construction materials, in particular, has altered Gaza economy from a manufacturing-based one to an economy that is more aid dependent.

Figure (5): A Comparison of the Types of Imported Goods through All Crossings during Different Periods



Note : Construction materials for NGO's are included within Humanitarian Aids

SECTION 1: CROSSINGS' PERFORMANCE continued

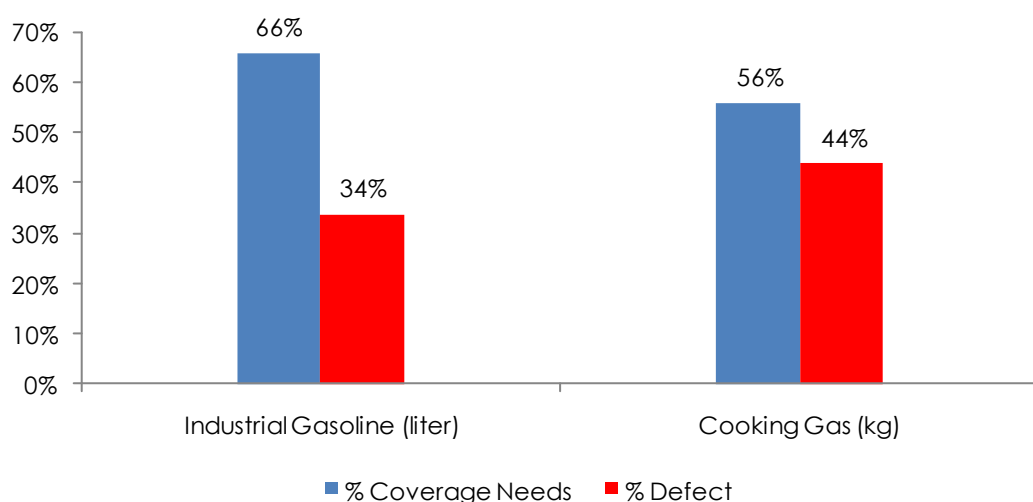
C FUEL IMPORTS PERFORMANCE

On January 1, 2010, the Israeli authorities announced that the Nahal Oz Crossing, which was used for the transfer of fuel from Israel to Gaza, is no longer operational (totally shut down). Subsequently, fuel imports has been shifted to Karem Abu Salem Crossing ever since. No Israeli petrol or diesel entered into Gaza during this period (Oct. 2009 –Sep. 2010), with the exception limited quantities of petrol and diesel for UNRWA.

Nevertheless, the Gaza marketplace is still mostly reliant on the fuel being transferred from Egypt through the tunnels under the Gazan-Egyptian border (due to its availability and cheap prices). As per the UN-OCHA report, the rate of these movements through the tunnels is nearly 100,000 liters of diesel and 100,000 liters of petrol per day ⁽¹⁾. Moreover, Cooking gas imports were only around **56%** of average needs while industrial gasoline imports for the Gaza Power Plant (GPP) were only around **66%** of average needs during this period. (see figure 6 below)

Table (2): Summary of Fuel and Gas Imports from Oct., 2009 – Sep., 2010.

Type	Lit/Gg
Petrol (liter)	1,228,649
Diesel (liter)	1,701,910
Industrial Gasoline (liter)	66,665,667
Cooking Gas (kg)	35,658,267

Figure (6): Illustration of Coverage needs⁽²⁾ vs. Defect Fuel Imports.

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

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

SECTION 2: PRIVATE SECTOR PERFORMANCE

A PERFORMANCE OF KEY SECTORS

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

Tables (3) and (4) present data on employment, firm numbers, and exports for furniture, garment, and processed food sectors before the closure, during the closure, and currently. The increase in number of working establishments is due to the coping mechanisms used, noting that the establishments are working with 10%-60% of total capacity.

Table (3): Key Industrial sectors status during three distinguished periods

Sector	Indicator	Before Closure (14 June 2007)	During the Closure 2008	Oct-09– Sep –2010	Notes
Industry	No. of Working Est.	3,900	7%	35%	- 10% of establishments are working with 30%-60% capacity
	No. of Workers	35,000	2000	6,000	- 25% operating with around 20% capacity
Construction	No. of Working Est.	125	8	50	- current scope include small maintenance works and rubble
	No. of Workers	50,000	100	1,500	

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

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

Industry	Normal Situation 2005			During the closure 2008			Oct-09– Sep –2010		
	Employment	Establishment	Monthly exports	Employment	Establishment	Monthly exports	Employment	Establishment	Monthly exports
Furniture	6,500	600	168	75	25	0	370	105	0
Garment	25,000	660	172	100	30	0	330	80	0
Processed Food	2,500	100	140	120	20	0	350	55	0

Source: Palestinian Federation of Industries "PFI".

SECTION 3: ONE YEAR HIGHLIGHTS

During the period of this project (October 2009—September 2010), PalTrade monitored and analyzed trucks movement at the different Gaza crossings. Further, PalTrade reported the changes in key indicators that reflect the status of the private sector in Gaza Strip. Also, PalTrade team prepared briefs on four issues that are summarized below:

At the very beginning, PalTrade highlighted the challenges that face the IT Sector in Gaza. As the closure has affected every aspect of the economy in Gaza, investments have been shifted to the services sector including IT which is less affected by physical impediments vis-a-vis other productive sectors. New training and certification centers were established during the closure targeting university students, new graduates and other stakeholders. Developing this sector is key for both the local market and export one.

In addition, PalTrade issued a study highlighting the impact of the Israeli War after one year. The study concluded the following:

- No regular exports have been allowed with the exception of 20 truckloads of carnation flowers which were exported after one year of the military operation vis-à-vis 5500 average annual exported truckloads before closure (January, 2005 – May, 2007).
- Import volumes are around the same of pre-military operation levels. It is only a quarter (24%) of the pre closure levels (i.e., before June, 2007). Noting that before closure, the average number of daily imports was 630 truckloads; of which **52%** was construction materials.
- Only 72 types of goods are allowed to enter into Gaza Strip (under humanitarian causes) vis-à-vis 4,000 items that used to be imported before the closure.
- No construction materials or any raw materials have been allowed into Gaza Strip. The only exception was 9 truckloads of "Glass" in December 2009, when the Israelis announced that they will allow only a total of 100 truckloads of Glass.
- Very Limited commercial petrol and diesel have been allowed into the Gaza Strip. In addition, only 46% of needed cooking gas was allowed into Gaza Strip throughout this period (one year after the war). 324 Industrial establishments were damaged due to Israeli operation. 44% of establishments were totally damaged, while 56% were partially damaged (slightly and considerably).

Furthermore, PalTrade issued another specialized study on the Impact of Gaza Closure on Clothes and Shoes imports. In this study, PalTrade concluded the following main highlights:

- Since June 2007, Israel imposed strict restriction on imported goods in terms of quantities and types. It is estimated that hundreds of containers were held at the Israeli ports and banned entry into Gaza Strip. Three years later, Israel granted entry for two types of these products (clothes and shoes) on April 4, 2010. Five truckloads of each type were granted entry into Gaza Strip on a daily basis.

SECTION 3: ONE YEAR HIGHLIGHTS continued

- Upon arrival to Gaza Strip, either partial or complete damages to these products were observed due to prolonged period and poor storage at the Israeli ports.
- Estimated losses were 30% per truckload in addition to storage cost and high demerage fees. All these incurred costs and restrictions clearly illustrate the extent of Gaza Merchants suffering.

Taking the circumstance at that time into consideration, PalTrade highlighted the resilience of Gaza private sector and innovation under siege. In this regard, PalTrade concluded that many of Gaza manufactures were forced to depend on the war rubble as source of raw materials to resume their work. According to the United Nation Development Program (UNDP) estimates, over 14,000 homes, 68 government buildings, and 31 non-governmental organizations (NGO) have been totally or partially demolished. Consequently, the estimated total amount of rubble is approaching 600,000 tons. As a result, and due to the closure preventing building materials from entering Gaza, combined with the high price of smuggled goods from Egypt, manufacturers have discovered new and innovative ways to recycle materials in order to stay in business.

In an attempt to highlight the impact of imposed siege at Gaza, PalTrade studied the Gaza crossings' performance during different periods. The findings revealed the following:

- Since June, 2007, Israel imposed a strict blockade allowing only limited list of goods to enter into Gaza.
- As a result, the tunnel trade had improved and flourished during this period because the allowed products into Gaza were only around 72 items. The harsh Israeli blockade policy has caused (80%-90%) of the private sector institutions to shutdown. Therefore, the Gaza economy became import oriented and dependent on humanitarian aid.
- In short, the Palestinian private sector in Gaza lost its competitive edge in the local and external markets and became more difficult and costly to reverse.

Last but not least, PalTrade initiated a short survey to capture the private sector perception on the new Israeli policy (recently, Israel adopted new policy in Gaza Strip and loosened the harsh closure regime that has been imposed on Gaza since June 2007). The results of the survey suggested that the capacity utilization of the private sector institutions has slightly improved between July 2010 and September 2010. Moreover, 18% of businesses indicated that the raw materials needed for their businesses have been totally obtained, 44 % of businesses indicated that the raw materials needed for their businesses have been partially allowed entry, and 38% of businesses indicated that no raw materials were allowed. This percentage mainly represents the metal, chemical, and leather industries. Finally, 67% of surveyed businesses indicated that selling price of some goods has decreased while the rest indicated that no change happened.

ANNEX 1: PROJECT OVERVIEW

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

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

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

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

Financing for the border monitoring activities in the:

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



Financed by:

Norwegian Consultant Trust
Fund



Under the supervision of:

The World Bank
(MNSSED) Finance and Private Sector

ANNEX 2: GAZA CROSSINGS OVERVIEW

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

AlMontar/Karni

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

Sufa

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

Karem Abu Salem/Kerem Shalom

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

Nahal Oz

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



Beit Hanoun/Erez

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

Rafah

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

ANNEX 3: GAZA CROSSINGS TIMELINE

Dec. 2005- May. 2007

Before The Closure

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

June 14, 2007- June 18, 2008

Closure Period

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

Truce or Hudna Period

June 19, 2007- Dec.19, 2008

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

Dec. 27, 2008 - Jan. 18, 2009

War Period

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

Jan. 19 , 2009 - sep. 30 , 2010

Post War Period

No improvements were witnessed on the crossings performance, where statistics illustrate that only 57,575 truckloads of commercial goods (mostly food) and humanitarian aid entered into Gaza, as well as the minimal exports of 138 truckloads of cash crops.

ANNEX 9: REFERENCES AND SOURCES

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