Fish and Seafood Consumption Habits & Attitudes

Contents

CHAPTER 1 4
Introduction 4
Study details 4
Demographics 5
Study Findings 8
Fish Consumption Habits 8
Eating Fish 8
Buying Fish 14
CHAPTER 2 19
Introduction 19
Study details 19
Demographics 20
Study Findings 22
Fish & Seafood Retail Purchase – Fishery/Fish Markets 22
Frequency of purchase 22
Quantity and Price of Purchase 23
Source of Products 24
Fish & Seafood Retail Purchase – Restaurants 24
Frequency of purchase 24
Quantity and Price of Purchase 25
Source of Products 27
Fish & Seafood Retail Purchase – Upper trade 28

Frequency of purchase 28
Quantity and Price of Purchase 29
Source of Products 30
Fish & Seafood Retail Purchase – Suppliers 31
Fresh Fish 31
Fresh Shrimps 32
Frozen Fish 33
Frozen Shrimps 34
Fish & Seafood Retail Purchase – Agreement on Attributes 35
Fish & Seafood Retail Purchase – Agreement on Attributes – Retailers only 36
Executive Summary (En/Ar) 37
Analysis and Recommendations 44
Annex 1QUANT 46
Annex 2QUAL 49

CHAPTER 1

Introduction

In the framework of the project "Sustainable Fisheries Management for Improved Livelihoods of the Coastal Fishing Community in Tyr", the Association for the Development of Rural Capacities(ADR) is aiming to develop a communication and marketing strategy for the promotion of Tyr artisanal fishery products to restaurants and retailers in Tyr, Sidon, and Beirut.

The study consists of 3 major segments:

1. Public segment: in order to understand their fish and seafood consumption and purchase habits, a sample of 500 people, representative of the Greater Beirut are in terms of gender, age groups and household income was interviewed. All the sample consists of fish and seafood eaters.
2. Business segment: a selected sample of restaurants, major retailers, and fishmongers were questioned, in order to figure out who their fish and seafood suppliers are.
3. Branding: based upon the results of the first 2 segments, a branding strategy will be devised: to assess branding and added value initiatives to Tyr local fish, in order to promote and sell these local seafood products at other retail urban centers, so as to boost the sale value of the products and, consequently, increase their incomes and improve their families livelihoods.

This report details the findings of the 1st segment of the study.

Study details

This study was conducted during the month of May 2017, in the Greater Beirut Area. A total sample of 506 people, all fish eaters/buyers, were questioned about their fish and seafood eating and purchasing habits, zooming in on their preferences regarding types and categories of fish/seafood, product origins, methods of capture, preservation and display, as well as processing.

Demographics

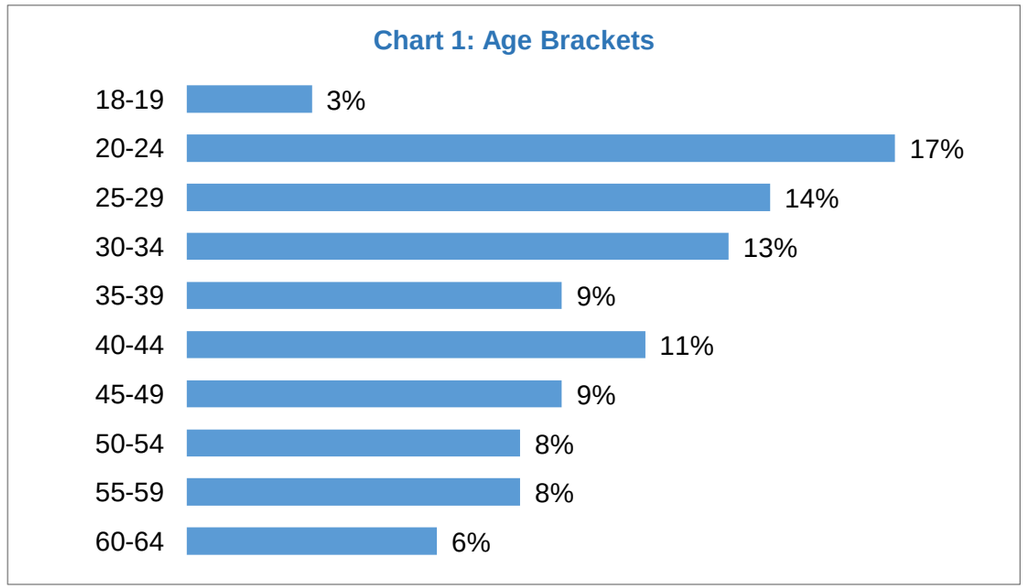
A total of 506 people were interviewed, split as per the below, in terms of:

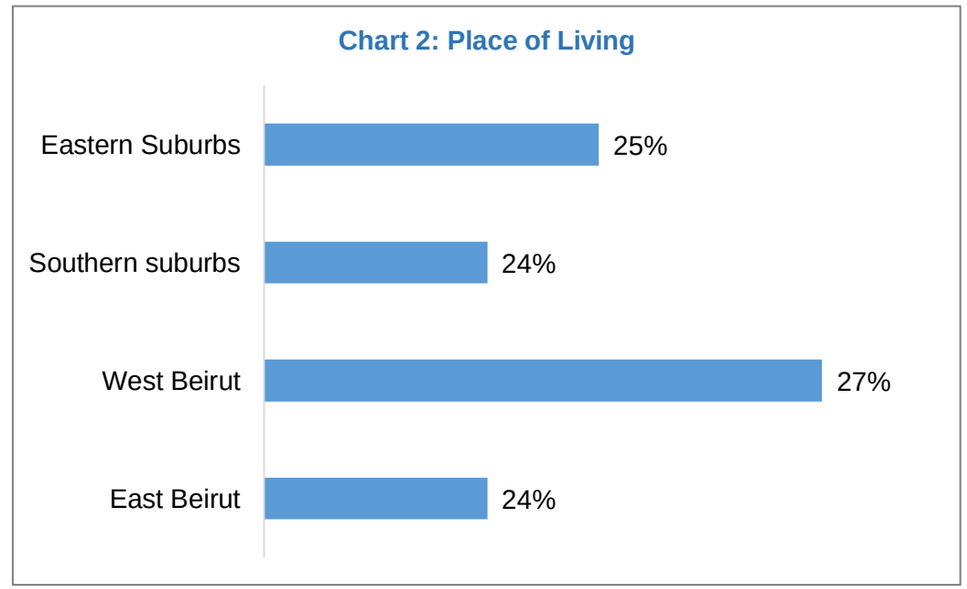
- **Age Groups**

20% of the sample consists of 18 to24-year-olds, while 47% are people between 25 and 45 years old. The age brackets are representative of the Greater Beirut area-age distribution. The average age is 38. ***(Chart 1)***

- **Place of living**

27% of the sample live in West Beirut, 25% in the Eastern Suburbs, 24% in the Southern Suburbs (Dahieh area) and 24% as well in East Beirut. ***(Chart 2)***





- **Gender**

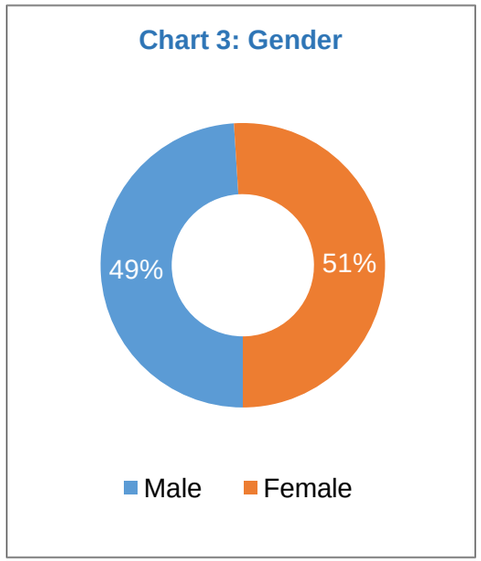
The sample consists of 246 males (49%) and 260 females (51%). ***(Chart 3)***

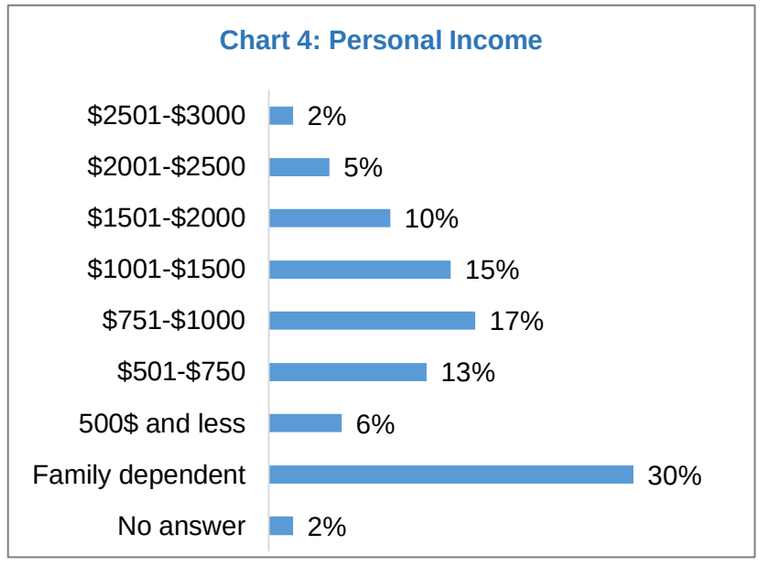
- **Personal Income**

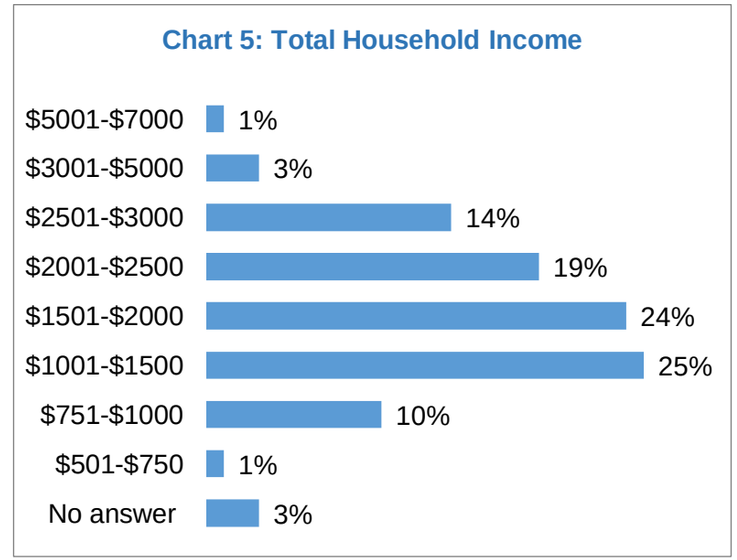
30% of the sample have no personal income, mainly females above the age of 55. 6% have less than 500 USD monthly incomes, while 32% make above 1000 USD per month. The average personal income is 797.57 USD. ***(Chart 4)***

- **Total Household Gross Income**

11% of the sample have household incomes less than 1000 USD per month. 49% make between 1000 and 2000 USD per month. The average household income is 1859.5 USD. ***(Chart 5)***







- **Education Level**

33% and 35% of the sample are high-school graduates and University graduates respectively. ***(Chart 6)***

- **Employment Type and Current Occupation**

The majority of the sample (56%) are employed full-time, and the larger share holds an office job, while 20% are housewives. 7% are looking for work (mostly ages 18-24). ***(Charts 7 and 8)***

Chart 6: Education Level

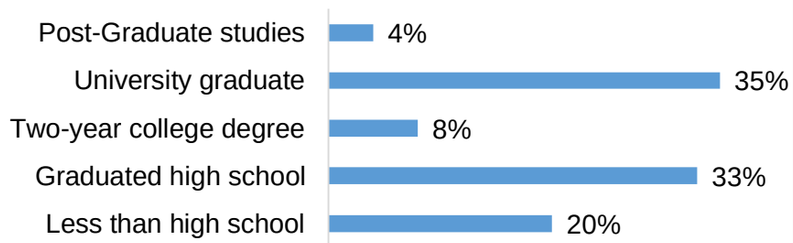


Chart 7: Employment Type

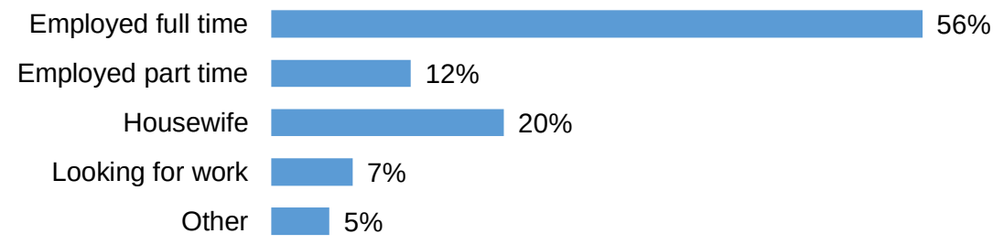
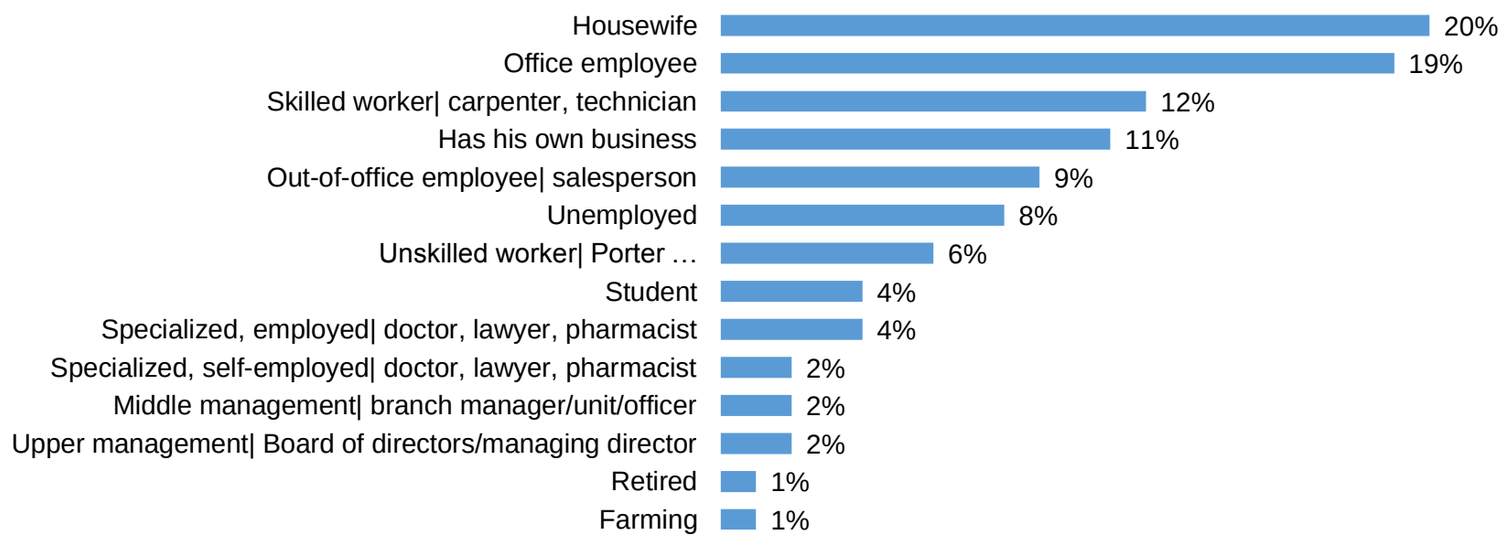


Chart 8: Current Occupation



Study Findings

Fish Consumption Habits

Eating Fish

Frequency and Location (Indoors Vs. Outdoors)

On average, fish/seafood consumers in the Greater Beirut Area eat fish, regardless of location or occasion, around 3 times a month, with the majority(34%) having fish/seafood once a month.***(Chart 9)***

More than half (56%) eat fish/seafood exclusively at their homes or relatives/friends' homes, 11% do so exclusively at restaurants. 34% of people eat fish/seafood at home as well as in restaurants. Those who consume at restaurants do so around twice a month, with the larger share of people (48%) going out once a month.***(Chart 10 and 11)***

Chart 9: How often do you consume fish & other seafood?

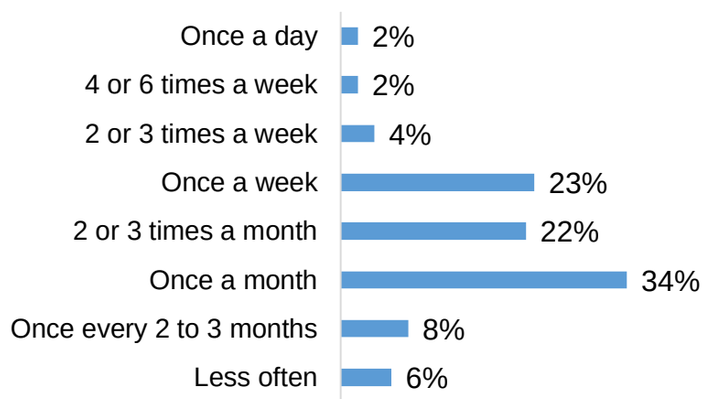


Chart 10: Where do you eat fish/seafood?

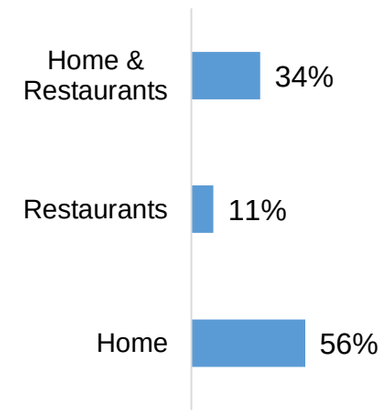
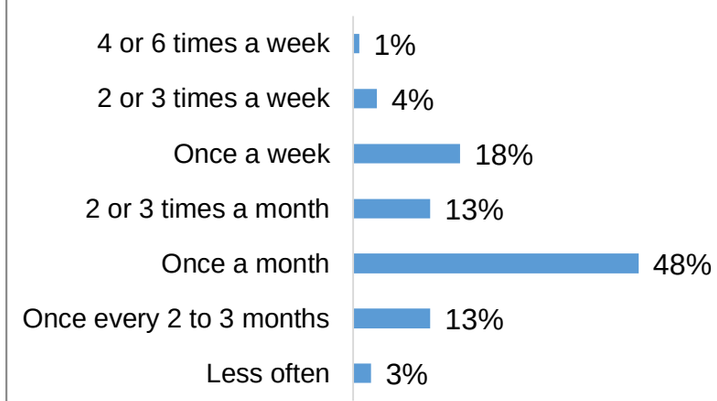


Chart 11: How often do you go out to have fish/seafood?



Price and Fish Eating Preference

In restaurants, the majority of consumers pay less than 40$ per person for fish and seafood, at an average of 27.43$ per person. ***(Chart 12)*** It is worthy to mention that the highest average per person (31.76$) is paid by those whose household income varies between 2000 and 2500$. ***(Table 1 in Annex)*** More than half the consumers (54%) prefer to eat **fried** fish/seafood, 38% prefer it **grilled,** whereas 9% prefer it **raw**. ***(Chart 13)***

Chart 12: How much does it cost?

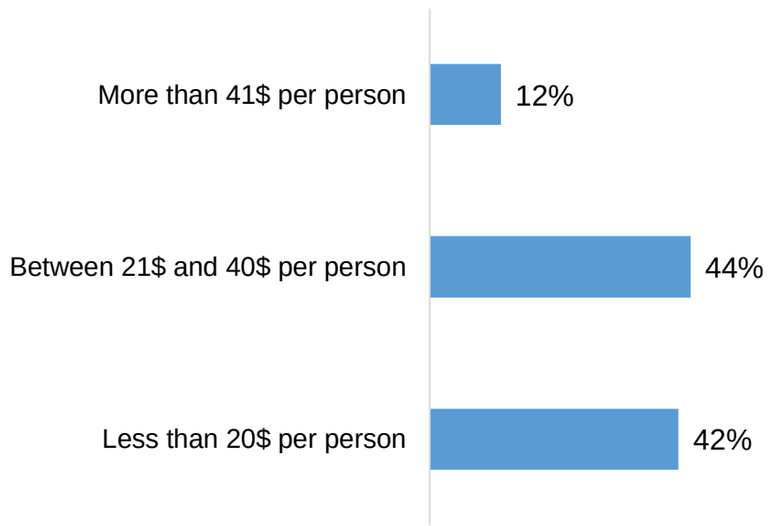
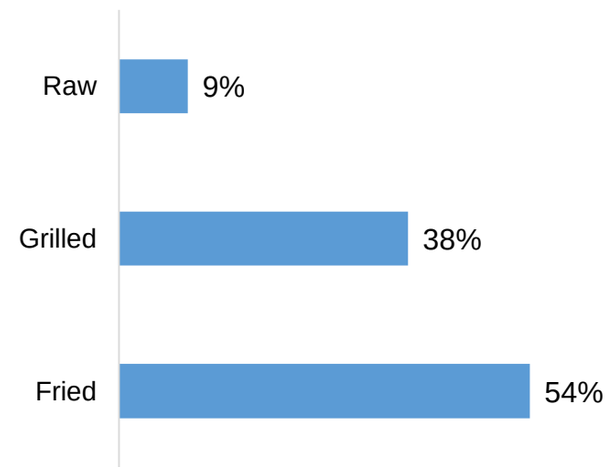


Chart 13: How do you prefer to consume your fish/seafood?

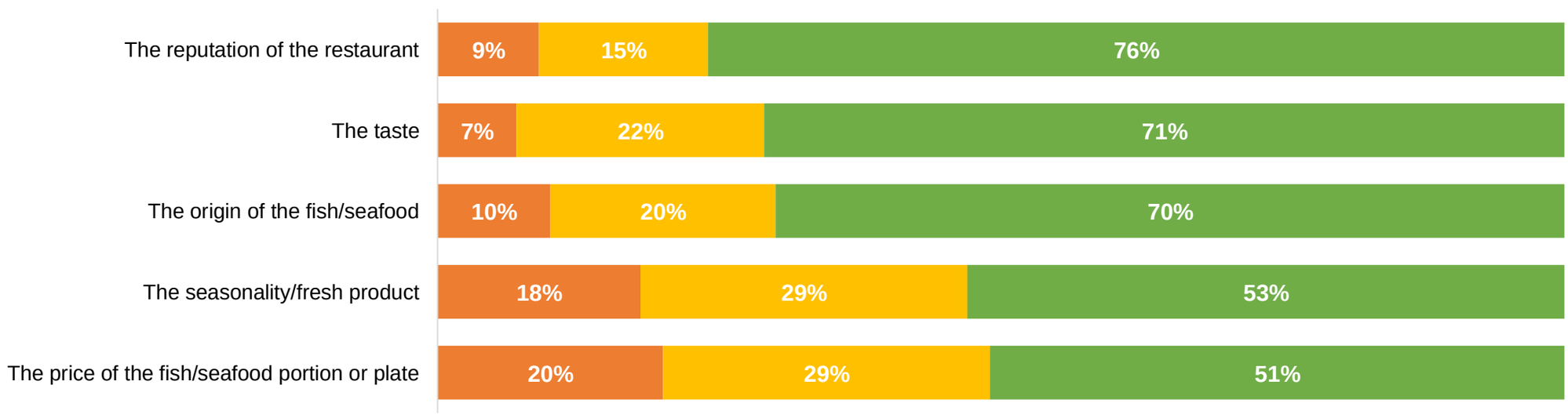


Restaurants consumption – Importance of Attributes

When eating out, the reputation of the restaurant is the most important attribute considered by the consumers, followed by the taste of the fish/seafood. The origin of the fish/seafood is also very important to consumers, whereas the price of the portion or plate holds the least importance.***(Chart 14)***

Not at all important									Extremely Important
1	2	3	4	5	6	7	8	9	10

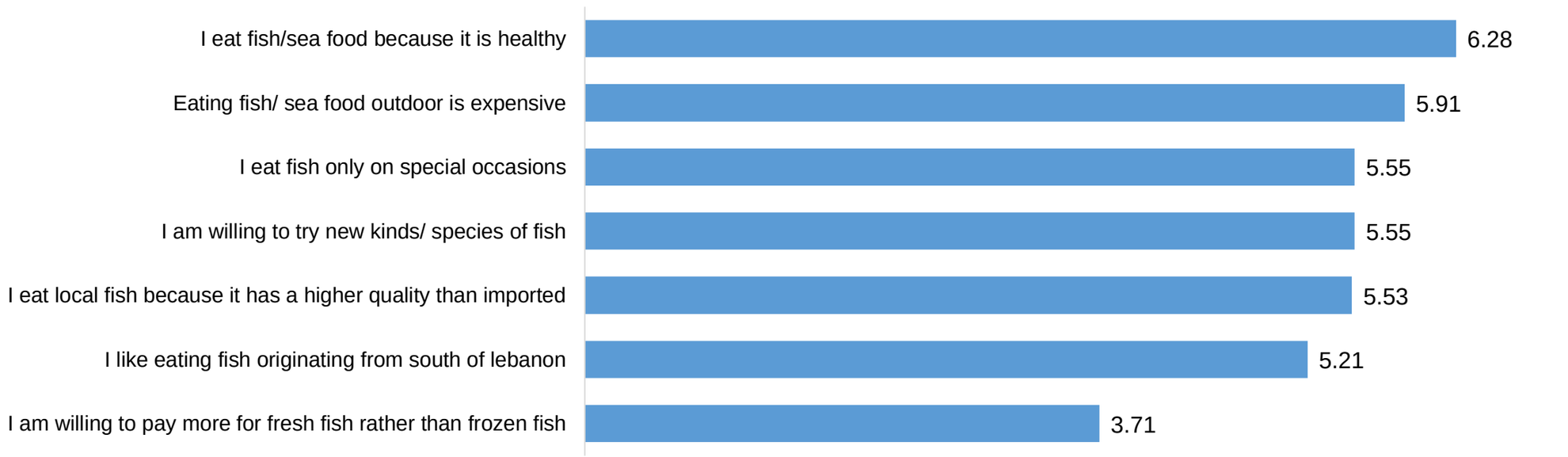
Chart 14: How important are the below attributes when eating fish/seafood Restaurants



Most people agree that they eat fish/seafood because it is healthy. They also acknowledge, to a lesser extent, that eating fish/seafood outdoors is expensive. However, they are not too willing to pay more for fresh fish rather than frozen fish. ***(Chart 17)***

Do not agree at all						Completely Agree
1	**2**	**3**	**4**	**5**	**6**	**7**

Chart 17: How much do you agree or disagree regarding the below statements? ***Averages***



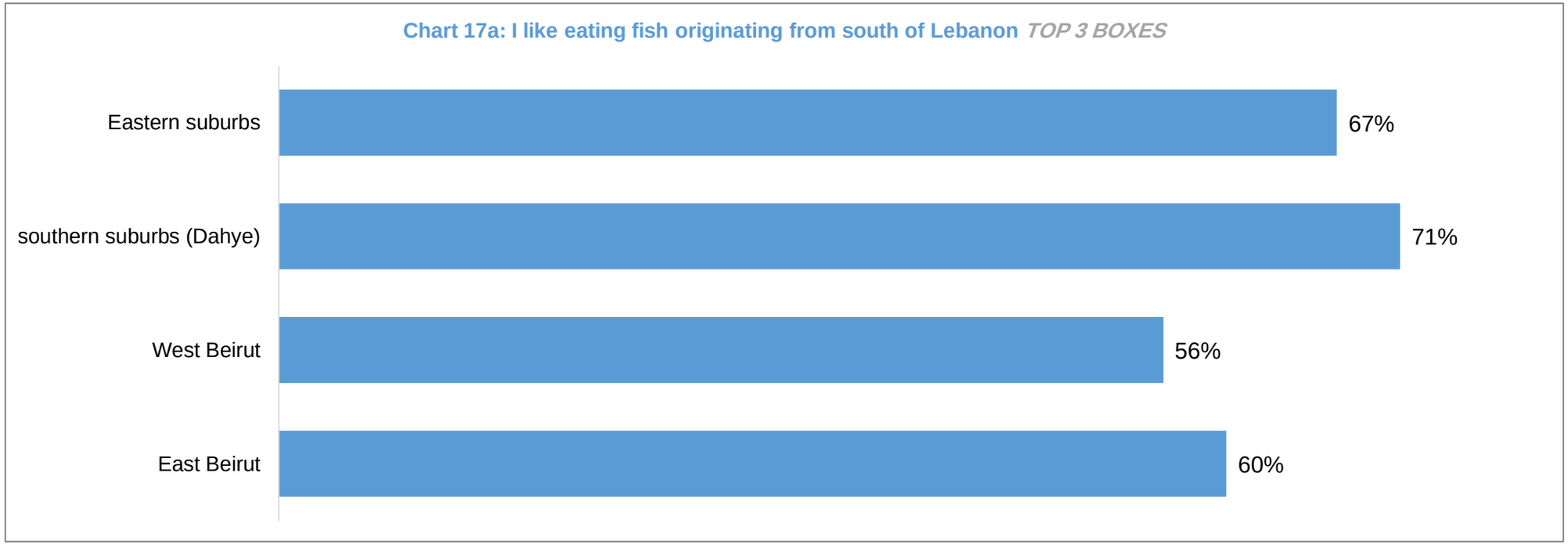
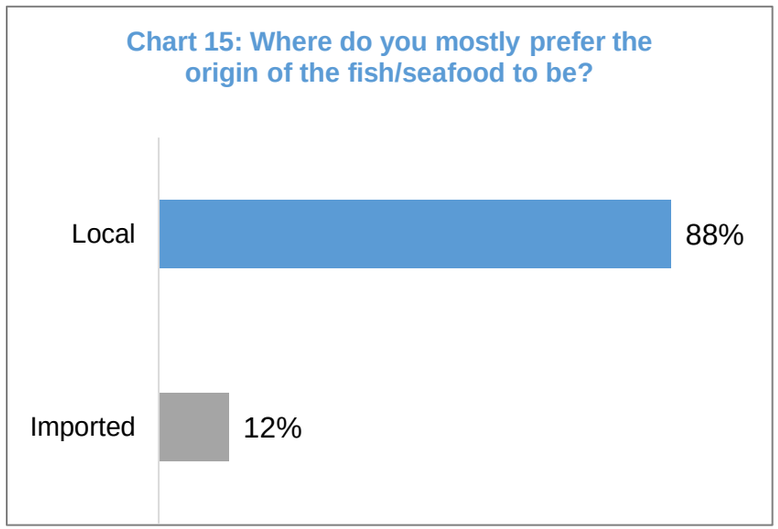
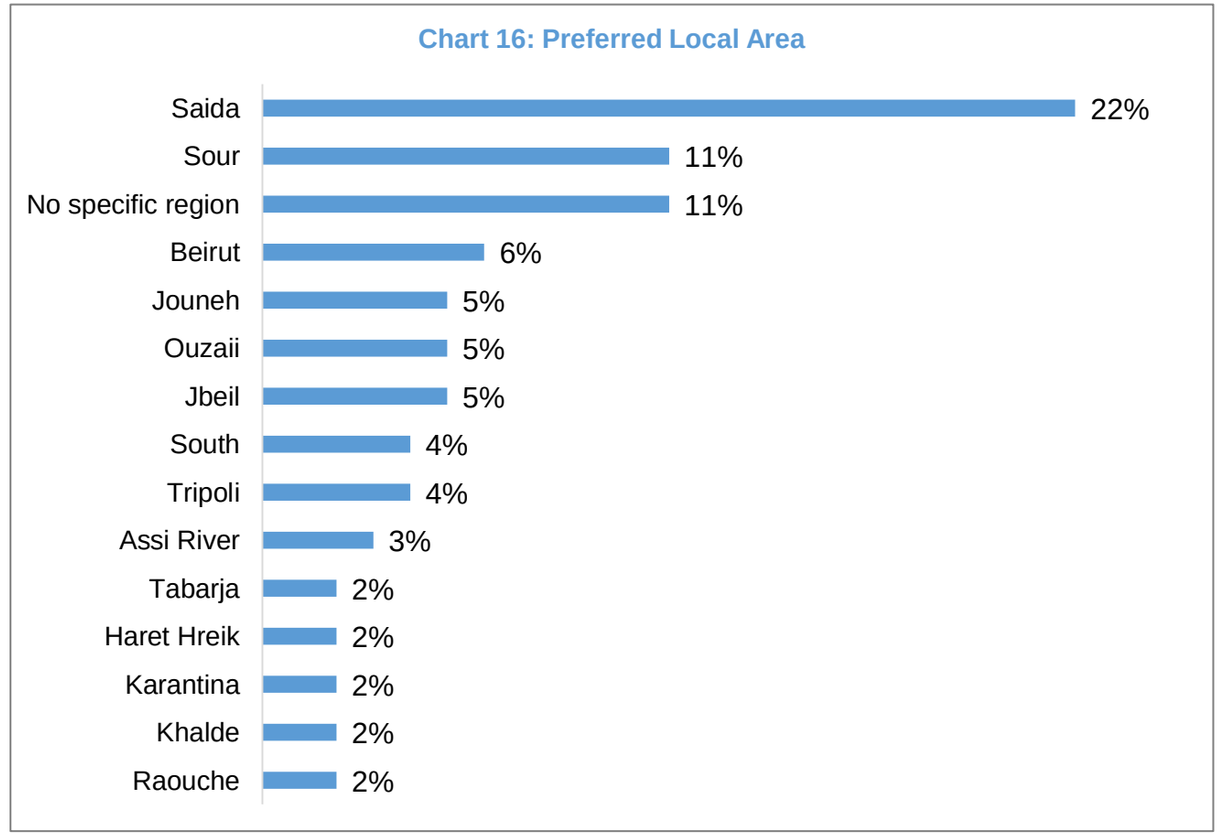


Chart 17a: I like eating fish originating from south of Lebanon TOP 3 BOXES
Eastern suburbs
67%
southern suburbs (Dahye)
71%
West Beirut
56%
East Beirut
60%

Restaurants consumption – Importance and Preferred Purchase Point

For those who considered the origin of the fish/seafood important, 88% prefer that the products be local. A very small percentage (12%) mentioned that they prefer the products to be imported ***(Chart 15)***. The Southern regions of Lebanon are mostly preferred, especially Saida (22%) and Sour (11%) ***(Chart 16)***.





Buying Fish

Frequency and Location (Source of Purchase)

On average, consumers buy fish/seafood around 2 times per month,with the larger share (36%) buying fish/seafood once a month, mainly from fisheries and fish markets. 20% of buyers get their fish and seafood from major upper trade, ***(Charts 18 and 19)***

Chart 18: How often do you buy fish/seafood?

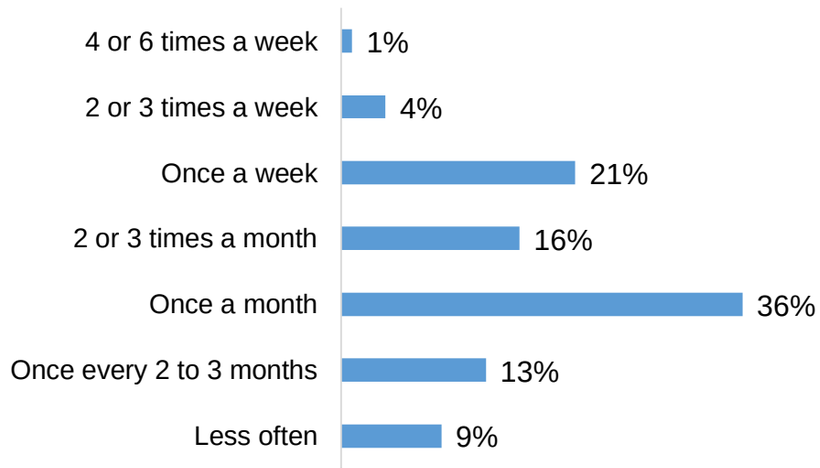
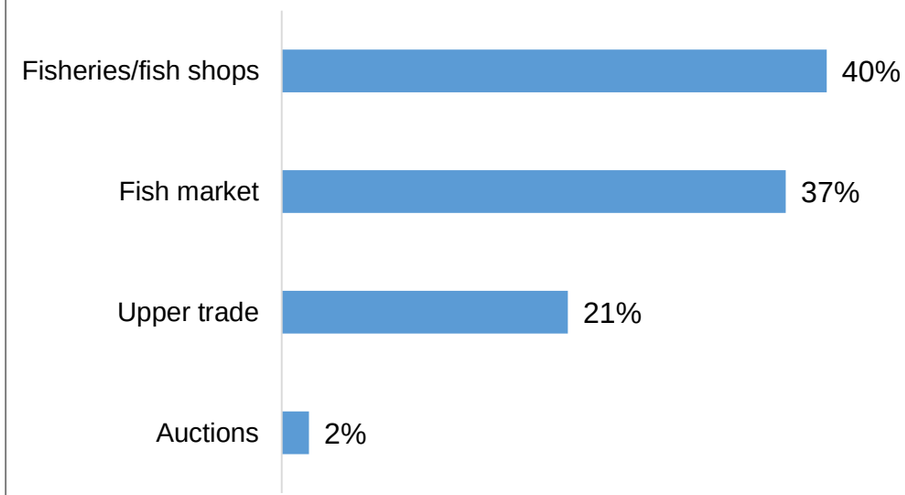


Chart 19: Where do you buy fish/seafood from?



Preferences in Origin, Method of Capture, Method of Preservation/Display, and Method of Processing

The majority of people have no specific preference in terms of origin for the types of fish and seafood they consume, except when it comes to bottom/demersal fish and juvenile species, where the majority prefers them to be local. Aquaculture is not too familiar among people, which is why they prefer the fish to be captured, the traditional way. Whatever the type of fish and seafood, the majority prefers to see them displayed freshly, and gutted (except for large pelagic fish such as swordfish and tuna, which people often associate with a canned product).

	Origin			Method of Capture		Method of Preservation/Display					Method of Processing		
	Local	Imported	No preference	Aquaculture	Caught	Fresh	Chilled on Ice	Frozen	Salted	Smoked	Fillet	Gutted	Other
Fresh water fish *N=221*	39%	5%	**56%**	32%	**68%**	**60%**	16%	8%	14%	1%	34%	**52%**	14%
Bottom/demersal fish *N=348*	**58%**	10%	31%	11%	**89%**	**62%**	24%	6%	7%	1%	31%	**62%**	7%
Small pelagic fish *N=253*	45%	5%	**50%**	17%	**83%**	**56%**	25%	10%	6%	2%	23%	**64%**	13%
Juvenile species *N=293*	**53%**	5%	42%	17%	**83%**	**61%**	23%	10%	4%	2%	12%	**73%**	15%
Large pelagic fish *N=253*	36%	14%	**50%**	28%	**72%**	**42%**	19%	19%	15%	4%	24%	19%	**58%**
Shrimps *N=276*	33%	22%	**45%**	33%	**67%**	**40%**	27%	24%	6%	4%	30%	**35%**	**35%**
Other crustaceans *N=128*	18%	7%	**75%**	33%	**67%**	**40%**	26%	13%	9%	12%	28%	**52%**	20%
Mollusks, cephalopods *N=131*	19%	7%	**74%**	29%	**71%**	**40%**	25%	18%	8%	8%	27%	**50%**	22%
Shell fish *N=151*	24%	6%	**70%**	42%	**58%**	**40%**	29%	8%	15%	9%	26%	**46%**	28%

Price and Quantities purchased

On average, consumers spend an average of 63$ per month on buying fish/seafood, buying an average of 3 Kilos per visit (***Chart 20 and 21 in Annex***).
Household incomes ranging between 2501-3000 buy the highest amount average of 86.65$ per month***(Table 2 in Annex)***.

Chart 20: On average per month, how much do you spend on buying fish/seafood?

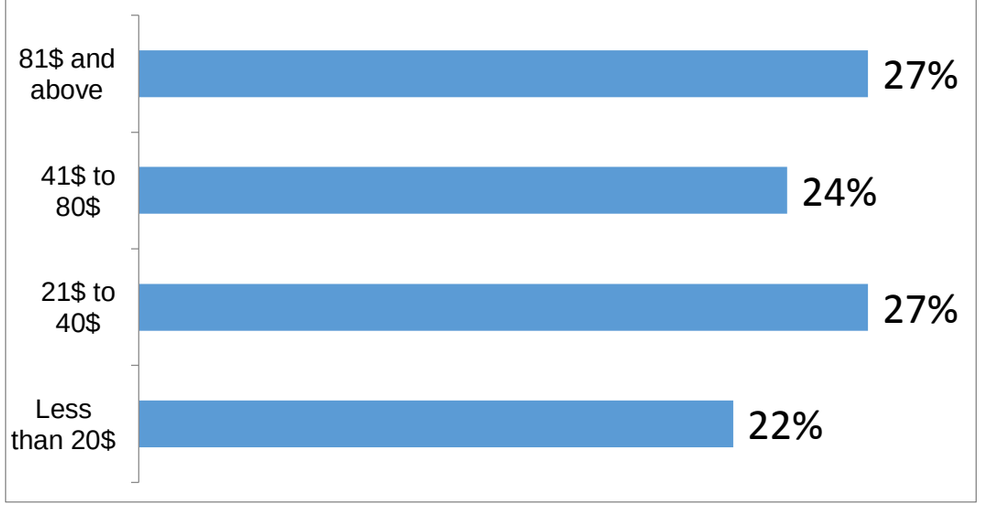
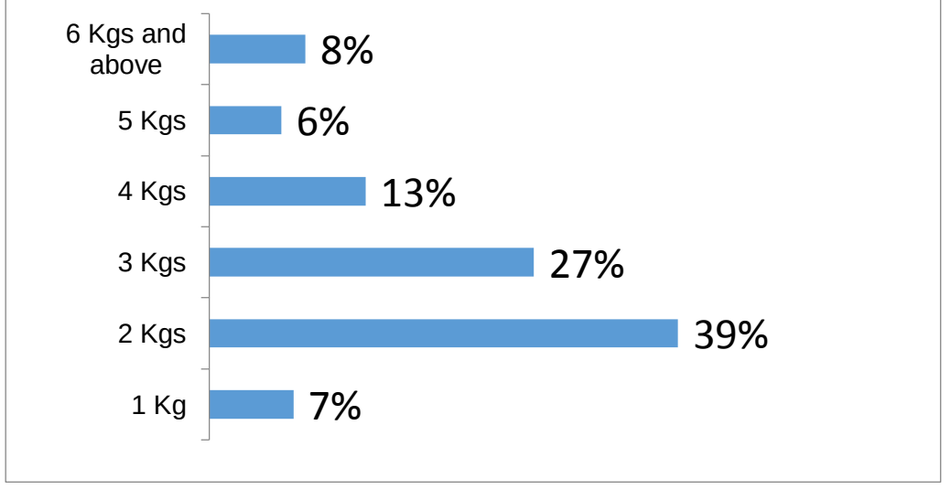


Chart 21: Per one visit to the fishery/supermarket… what is the amount of fish/seafood which you normally buy?

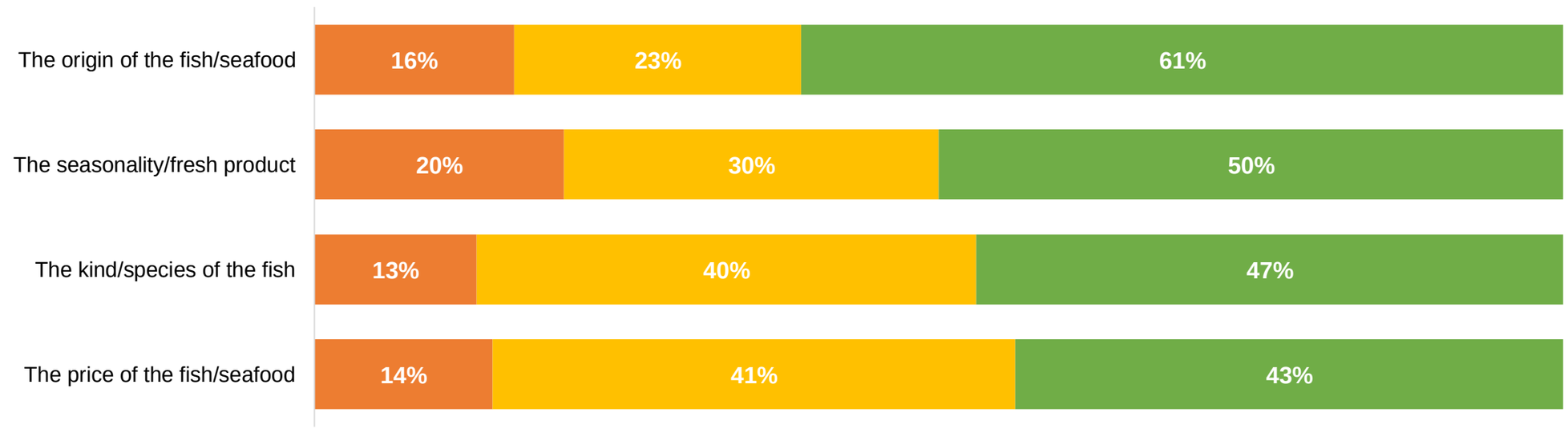


Purchasing – Importance of Attributes

When buying fish and seafood, the most important attribute that people think of is the origin of the product, followed by the freshness and kind/species of the fish. The price is thought of as well but to a lesser extent. ***(Chart 22 in Annex)***

Not at all important									Extremely Important
1	2	3	4	5	6	7	8	9	10

Chart 22: How important are the below attributes when buying fish/seafood?



Purchasing – Preference of Origin

The majority of consumers prefer to buy local products, and especially from the southern areas of Saida (24%) and Tyr (13%) ***(Charts 23 and 24)***.

Chart 22: Where do you mostly prefer the origin of the fish/seafood to be?

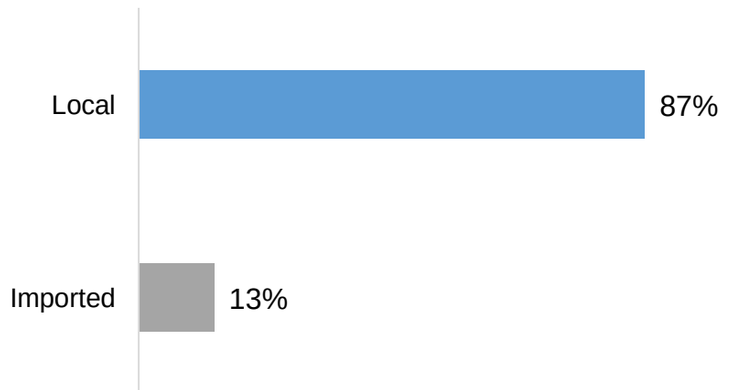
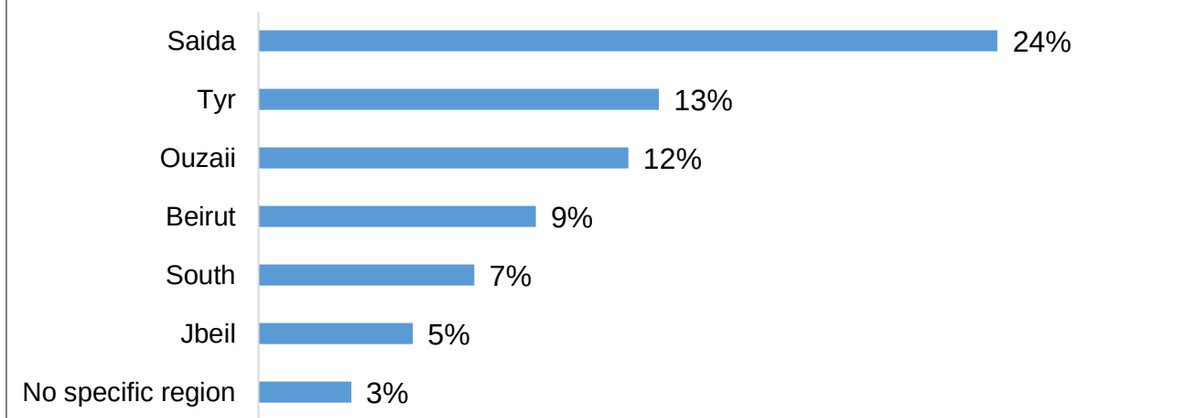


Chart 23: Preferred Local Area



CHAPTER 2

Introduction

In the framework of the project "Sustainable Fisheries Management for Improved Livelihoods of the Coastal Fishing Community in Tyr", the Association for the Development of Rural Capacities (ADR) is aiming to develop a communication and marketing strategy for the promotion of Tyr artisanal fishery products to restaurants and retailers in Tyr, Sidon, and Beirut.

The study consists of 3 major segments:

4. Public segment: in order to understand their fish and seafood consumption and purchase habits, a sample of 500 people, representative of the Greater Beirut are in terms of gender, age groups and household income was interviewed. All the sample consists of fish and seafood eaters.
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This report details the findings of the 2nd segment of the study.

Study details

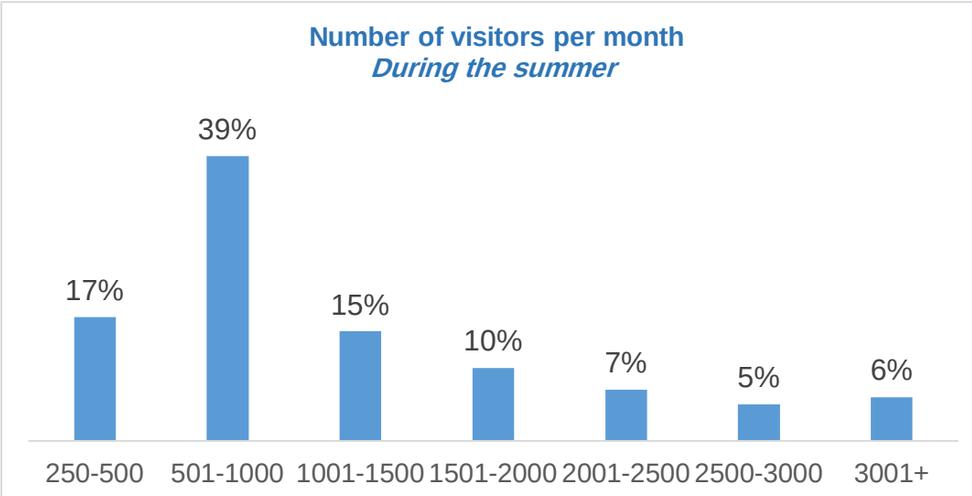
This study was conducted during the month of May 2017, around Beirut and South Lebanon, specifically Beirut, Metn, Baabda, Aley, Tyr, and Saida. A total sample of 104 businesses and point of sales were questioned about their fish and seafood retail purchasing, zooming in mainly on quantities purchased, prices and origin and location of suppliers.

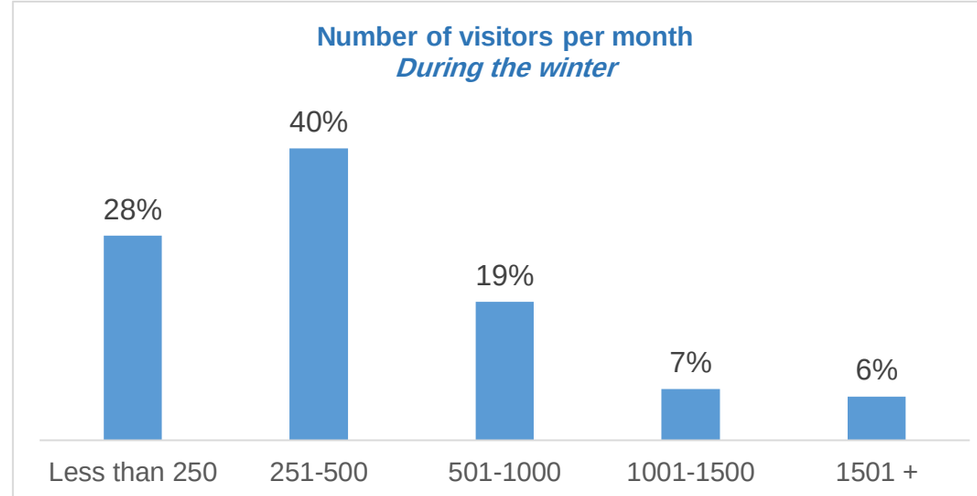
Demographics

A total of 104businesses and point of sales were interviewed, split as per the below, in terms of type and locations:

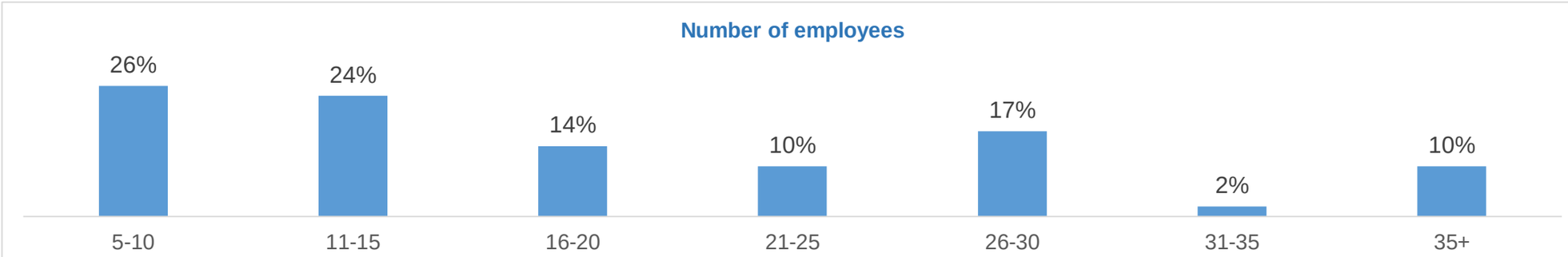
Type				
	Restaurant	Fishery/Fish Market	Upper trade (supermarkets)	Total
Location	50	50	4	104
Beirut	10	17	-	27
Tyr	10	11	-	21
Saida	13	12	-	25
Metn	7	4	2	13
Baabda	4	4	2	10
Aley	6	2	-	8

- An average of 1200 customers per month visit the restaurants during the summer and an average of 502 customers visit during the winter.





- The restaurants employ an average of 35 employees.



Study Findings

Fish & Seafood Retail Purchase – Fishery/Fish Markets

Frequency of purchase

Most purchased products among Fishery/Fish Markets are Fresh Fish, mostly purchased on a daily basis, followed by Fresh Shrimps (mostly purchased 2-3 times a week), Fresh Mollusks/Cephalopodes, Frozen Shrimps and Frozen Fish mostly purchased once a week.

	Fresh fish	Fresh shrimps	Other fresh crustaceans (crab, lobster)	Fresh Mollusks cephalopods (octopus, calamari…)	Fresh Shellfish(Mussels scallops)	Frozen fish (frozen fillet…)	Frozen shrimps	Other frozen crustaceans (crab, lobster)	FrozenMolluskscephalopods (octopus, calamari…)	Frozen Shell fish (mussels scallops)	Canned fish (tuna)	Processed seafood (crab sticks, fish fingers, fish escalope …)
Daily	**82%**	16%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%
2-3 times a week	10%	**34%**	14%	16%	2%	4%	4%	0%	0%	0%	0%	0%
Once a week	0%	14%	18%	**24%**	6%	**38%**	**42%**	12%	14%	0%	0%	6%
Every 2-3 weeks	2%	8%	4%	4%	6%	6%	6%	0%	0%	0%	0%	0%
Every month	0%	0%	0%	0%	0%	16%	20%	10%	12%	0%	8%	10%
Every 2-3 months	0%	2%	2%	0%	2%	0%	0%	0%	0%	0%	0%	0%
Less Often	0%	10%	20%	16%	10%	0%	0%	0%	0%	2%	0%	0%
Do not buy	6%	16%	40%	38%	74%	36%	28%	78%	74%	98%	92%	84%
Average number of times per month	**25.6**	**8.9**	**2.8**	**3.2**	**0.6**	**2.2**	**2.4**	**0.6**	**0.7**	**-**	**0.08**	**0.3**

Quantity and Price of Purchase

Fisheries/Fish Markets purchase an average of 60 Kilos of Fresh Fish in every transaction, at an average kilo price of 11.55$. They also purchase an average of 36 Kilos of Frozen Fish at 8.67$ per kilo on average. The thirdmost purchased product isFrozen Shrimps, with an average of 31.4 Kilos per purchase, at an average kilo price of 11.67$. Highest prices are for Fresh Mollusks/Cephalopods and Fresh Shrimps, at an average kilo price of 18.35$ and 15.14$ respectively.

	Fresh fish	Fresh shrimps	Other fresh crustaceans (crab, lobster)	Fresh Mollusks cephalopods (octopus, calamari…)	Fresh Shellfish (mussels scallops)	Frozen fish (frozen fillet…)	Frozen shrimps	Other frozen crustaceans (crab, lobster)	FrozenMollusksc ephalopods (octopus, calamari…)	Frozen Shellfish (mussels scallops)	Canned fish (tuna)	Processed seafood (crab sticks, fish fingers, fish escalope…)
Average Quantity purchased per transaction (in Kgs)	**60.3**	**24.4**	12.3	**13.16**	9.7	**36.5**	**31.4**	14.2	16.4	8	15.7	18.5
Average Price of Purchased Kg (in USD)	**11.55 $**	**15.14 $**	13.87 $	**18.35 $**	10.75$	**8.67 $**	**11.67 $**	9.83 $	11.00 $	12.50 $	9.88 $	9.53 $

Source of Products

The vast majority of Fisheries/Fish Markets get their products locally, mainly from the Karantina fish market in Beirut, and from Saida and Tyr in the south. Only 1 fishery/Fish Market imports Fresh Shrimps from Dubai. *For better details, please refer to Tables 1 to 12.*

	Fresh fish *N=47*	Fresh shrimps *N=42*	Other fresh crustaceans (crab, lobster) *N=30*	Fresh Mollusks cephalopods (octopus, calamari..) *N=31*	Fresh Shellfish (mussels scallops) *N=13*	Frozen fish (frozen fillet…) *N=32*	Frozen shrimps *N=36*	Other frozen crustaceans (crab, lobster) *N=11*	FrozenMolluskscephalopods (octopus, calamari..) *N=13*	Frozen Shellfish (mussels scallops) *N=1*	Canned fish (tuna) *N=4*	Processed seafood (crab sticks, fish fingers, fish escalope..) *N=8*
Local	100%	98%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Imported	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

Fish & Seafood Retail Purchase – Restaurants

Frequency of purchase

Most purchased products among Restaurants are Fresh Fish, mostly purchased on a daily basis, followed by Fresh Shrimps (mostly purchased once a week), Other Fresh Crustaceans and Fresh Mollusks/Cephalopods (mostly purchased once a week), Frozen Fish and Frozen Shrimps, mostly purchased every month.

	Fresh fish	Fresh shrimps	Other fresh crustaceans (crab, lobster)	Fresh Mollusks cephalopods (octopus, calamari…)	Fresh Shellfish (mussels scallops)	Frozen fish (frozen fillet…)	Frozen shrimps	Other frozen crustaceans (crab, lobster)	FrozenMolluskscephalopods (octopus, calamari…)	Frozen Shellfish (mussels scallops)	Canned fish (tuna)	Processed seafood (crab sticks, fish fingers, fish escalope …)
Daily	58%	18%	4%	6%	0%	0%	0%	0%	0%	0%	0%	0%
2-3 times a week	26%	18%	10%	10%	2%	0%	2%	2%	0%	0%	0%	0%
Once a week	8%	28%	20%	20%	8%	32%	22%	4%	8%	0%	0%	0%
Every 2-3 weeks	2%	2%	6%	8%	4%	10%	6%	0%	0%	0%	0%	2%
Every month	2%	4%	6%	4%	2%	36%	32%	12%	16%	0%	26%	24%
Every 2-3 months	0%	0%	0%	0%	0%	2%	4%	0%	0%	0%	0%	0%
Less Often	0%	8%	14%	14%	6%	2%	2%	0%	2%	2%	0%	0%
Do not buy	4%	22%	40%	38%	78%	18%	32%	82%	74%	98%	74%	74%
Average number of times per month	20.3	8.4	3.2	3.8	0.6	1.8	1.5	0.5	0.5	-	0.2	0.2

Quantity and Price of Purchase

Restaurants purchase an average of 30 Kilos of Fresh Fish in every transaction, at an average kilo price of 19.2$ (highest price for a seafood product). They also purchase an average of 24.6 Kilos of Frozen Fish at 11.6$ per kilo on average. The third mostly purchased product is Frozen Shrimps, with an average of 26 Kilos per purchase, at an average kilo price of 9.5$. Apart from Fresh Fish, highest prices are for Fresh Mollusks/Cephalopods, Other Frozen and Fresh Crustaceans, at an average kilo price of 15$, 14.6$ and 14.4$ respectively.

	Fresh fish	Fresh shrimps	Other fresh crustaceans (crab, lobster)	Fresh Mollusks cephalopods (octopus, calamari…)	Fresh Shellfish (mussels scallops)	Frozen fish (frozen fillet…)	Frozen shrimps	Other frozen crustaceans (crab, lobster)	FrozenMollusksc ephalopods (octopus, calamari…)	Frozen Shellfish (mussels scallops)	Canned fish (tuna)	Processed seafood (crab sticks, fish fingers, fish escalope…)
Average Quantity purchased per transaction (in Kgs)	**30.08**	17.51	**9.37**	**9.00**	12.09	**24.63**	**26.06**	**10.56**	10.69	20.00	17.15	18.69
Average Price of Purchased Kg (in USD)	**19.2$**	15.7$	**14.4$**	**15.0$**	7.6$	**11.6$**	**9.5$**	**14.6$**	13.3$	4.5$	9.0$	10.1$

Source of Products

The vast majority of Restaurants get their products locally, mainly from the Karantina fish market in Beirut, and from Tyr in the south, except for when it comes to Fresh Fish and Other Fresh Crustaceans, which are mostly from Saida and Tyr. When the product is not local countries of import consist of Dubai, Turkey, KSA, and France. *For better details, please refer to Tables 1 to 12.*

	Fresh fish *N=48*	Fresh shrimps *N=39*	Other fresh crustaceans (crab, lobster) *N=30*	Fresh Mollusks cephalopods (octopus, calamari..) *N=31*	Fresh Shell fish (mussels scallops) *N=11*	Frozen fish (frozen fillet…) *N=41*	Frozen shrimps *N=34*	Other frozen crustaceans (crab, lobster) *N=9*	FrozenMolluskscephalopods (octopus, calamari..) *N=13*	Frozen Shellfish (mussels scallops) *N=1*	Canned fish (tuna) *N=13*	Processed seafood (crab sticks, fish fingers, fish escalope..) *N=13*
Local	96%	95%	93%	94%	91%	95%	94%	89%	92%	100%	92%	85%
Imported	4%	5%	7%	6%	9%	5%	6%	11%	8%	0%	8%	15%

Fish & Seafood Retail Purchase – Upper trade

Frequency of purchase

Most purchased products among Large Retailers are Fresh Fish, Fresh Shrimps, Other Fresh Crustaceans and Fresh Mollusks/Cephalopods, Processed Seafood and Frozen Fish. Other Frozen Crustaceans and Frozen Mollusks/Cephalopods are also bought, to a lesser extent. It is worthy to mention that all interviewed retailers purchase Canned Fish once a month.

	Fresh fish	Fresh shrimps	Other fresh crustaceans (crab, lobster)	Fresh Mollusks cephalopods (octopus, calamari…)	Fresh Shellfish (mussels scallops)	Frozen fish (frozen fillet…)	Frozen shrimps	Other frozen crustaceans (crab, lobster)	FrozenMolluskscephalopods (octopus, calamari…)	Frozen Shellfish (mussels scallops)	Canned fish (tuna)	Processed seafood (crab sticks, fish fingers, fish escalope …)
Daily	**75%**	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2-3 times a week	0%	25%	25%	25%	0%	0%	0%	0%	0%	0%	0%	0%
Once a week	0%	25%	**50%**	**50%**	25%	25%	0%	0%	0%	0%	0%	25%
Every 2-3 weeks	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	25%
Every month	0%	0%	0%	0%	0%	**50%**	**75%**	25%	25%	25%	**100%**	**50%**
Every 2-3 months	0%	0%	0%	0%	0%	25%	25%	25%	25%	25%	0%	0%
Less Often	0%	0%	0%	0%	25%	0%	0%	**50%**	**50%**	0%	0%	0%
Do not buy	25%	25%	25%	25%	25%	0%	0%	0%	0%	50%	0%	0%
Average number of times per month	**22.5**	**11**	**4.5**	**4.5**	**1.5**	**1.6**	**0.8**	**0.4**	**0.4**	**0.3**	**1**	**2**

**percentages only directional due to the small sample size (4 large retailers)*

Quantity and Price of Purchase

Retailers purchasing prices are considerably lower than that of Restaurants and Fisheries/Fish Markets, with an average of 9.4$ per kilo of Fresh Fish (Vs. 11.55$ and 19.2$ for Fisheries/Fish Markets and Restaurants respectively). However, they mostly stock up on frozen items more than fresh items (mostly processed seafood, of which they purchase an average of 70 Kilos per transaction)

	Fresh fish	Fresh shrimps	Other fresh crustaceans (crab, lobster)	Fresh Mollusks cephalopods (octopus, calamari…)	Fresh Shell fish (mussels scallops)	Frozen fish (frozen fillet…)	Frozen shrimps	Other frozen crustaceans (crab, lobster)	FrozenMollusksc ephalopods (octopus, calamari…)	Frozen Shell fish (mussels scallops)	Canned fish (tuna)	Processed seafood (crab sticks, fish fingers, fish escalope…)
Average Quantity purchased per transaction (in Kgs)	**20.00**	16.67	12.33	17.33	**14.33**	67.25	47.50	**25.00**	**26.25**	**35.00**	**58.25**	**69.50**
Average Price of Purchased Kg (in USD)	**9.4$**	6.5$	7.9$	6.8$	**9.2$**	4.7$	4.2$	**7.0$**	**7.9$**	**3.7$**	**6.4$**	**9.9$**

**numbers only directional due to the small sample size (4 large retailers)*

Source of Products

The vast majority of Large Retailers get their products locally. *For better details, please refer to Tables 1 to 12.*

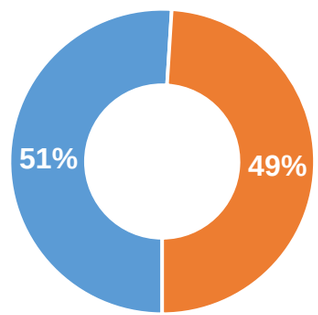
	Fresh fish *N=3*	Fresh shrimps *N=3*	Other fresh crustaceans (crab, lobster) *N=3*	Fresh Mollusks cephalopods (octopus, calamari..) *N=3*	Fresh Shellfish (mussels scallops) *N=3*	Frozen fish (frozen fillet…) *N=4*	Frozen shrimps *N=4*	Other frozen crustaceans (crab, lobster) *N=4*	FrozenMolluskscephalopods (octopus, calamari..) *N=4*	Frozen Shellfish (mussels scallops) *N=2*	Canned fish (tuna) *N=4*	Processed seafood (crab sticks, fish fingers, fish escalope..) *N=4*
Local	100%	100%	100%	100%	100%	50%	50%	50%	50%	50%	50%	50%
Imported	0%	0%	0%	0%	0%	50%	50%	50%	50%	50%	50%	50%

Fish & Seafood Retail Purchase – Suppliers

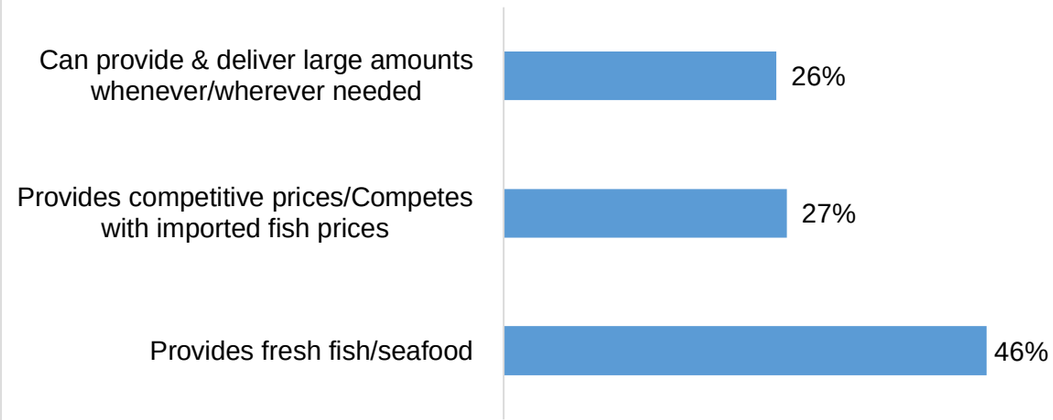
Criteria for selecting a supplier and suppliers vary according to the type of product. For a full list of criteria and suppliers, please refer to Tables 13 and 14.

Fresh Fish

Do you have one specific supplier for **Fresh Fish**?



What are your top 3 criteria for selecting a supplier for **Fresh Fish**?

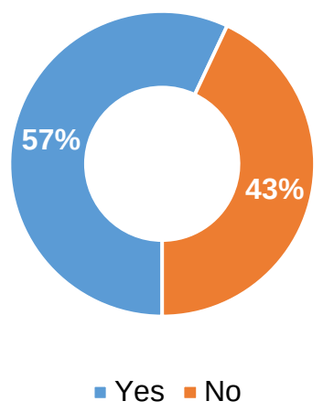


Top Fresh Fish suppliers

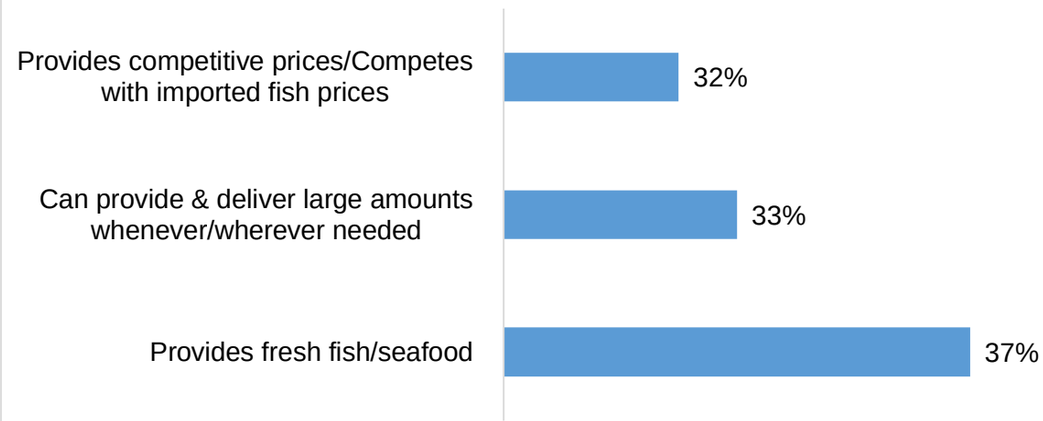
Tyr (Port of Tyr/Fishery inTyr)	**42%**
Karantina	**26%**
Saida(Port of Saida/Fishery in Saida)	**36%**
Sarafand(Port of Sarafand)	**14%**
Nakoura	**4%**

Fresh Shrimps

Do you have one specific supplier for **Fresh Shrimps**?



What are your top 3 criteria for selecting a supplier for **Fresh Shrimps**?

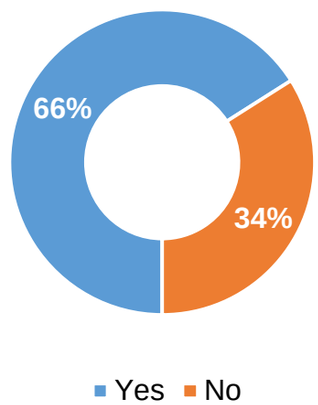


Top Fresh Shrimps suppliers

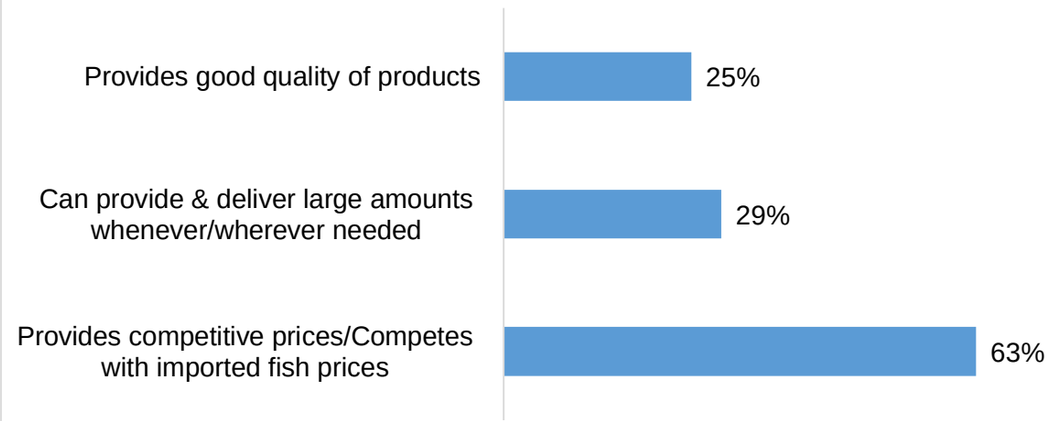
Tyre (Port of Tyre/Fishery in Tyre/El Samra Fishery – Tyre)	**38%**
Karantina	**35%**
Saida(Port of Saida/Fishery in Saida)	**25%**
Nakoura	**5%**
Sarafand(Port of Sarafand)	**5%**

Frozen Fish

Do you have one specific supplier for **Frozen Fish**?



What are your top 3 criteria for selecting a supplier for **FrozenFish**?



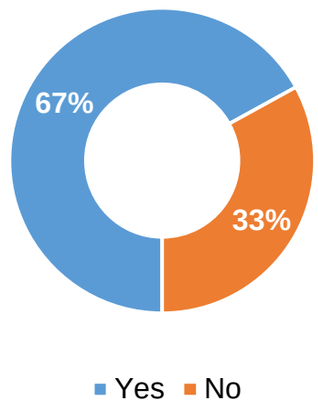
Top Frozen Fish suppliers

Karantina	**33%**

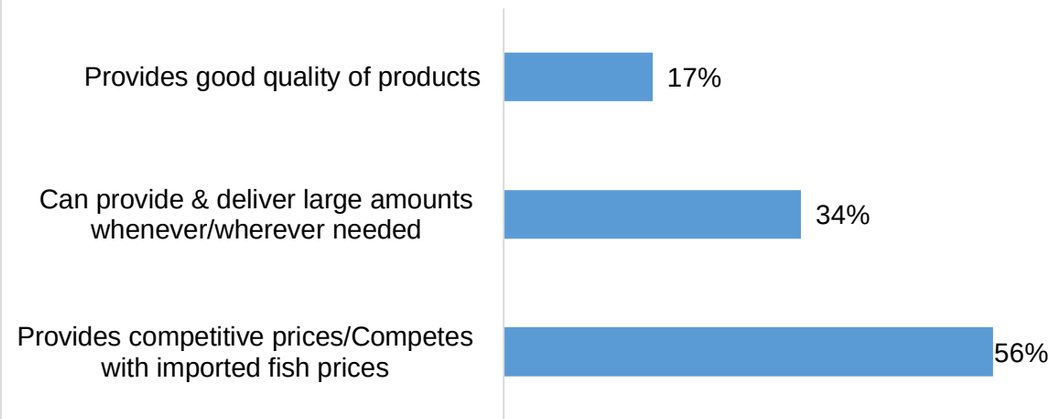
**Other regions are very low mentions

Frozen Shrimps

Do you have one specific supplier for **Frozen Shrimps**?



What are your top 3 criteria for selecting a supplier for **Frozen Shrimps**?



Top Frozen Shrimps suppliers

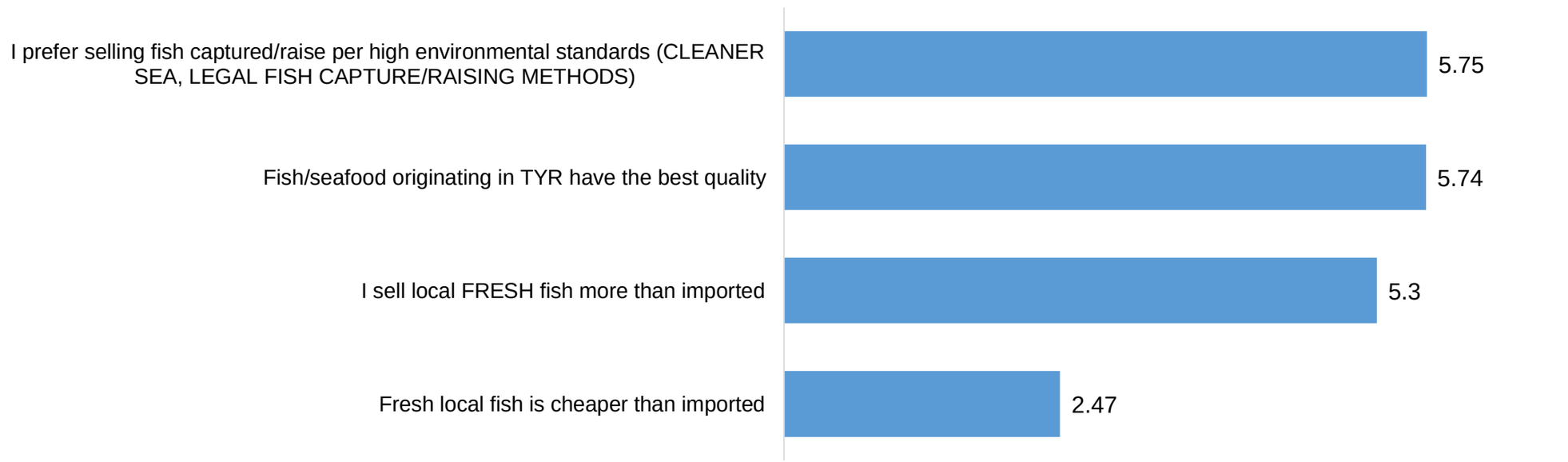
Karantina	**36%**

Fish & Seafood Retail Purchase – Agreement on Attributes

The larger share of businesses prefers to sell captured/raised fish per high environmental standards – Fisheries/Fish Markets agree more than the other businesses. They do not consider, however, that fresh local fish is cheaper than imported.

Do not agree at all						Completely Agree
1	2	3	4	5	6	7

Chart 17: How much do you agree or disagree regarding the below statements? *Averages*



Fish & Seafood Retail Purchase – Agreement on Attributes – Retailers only

"*For frozen/processed fish/seafood we prefer a local supplier*"

Only 1 out of the 4 retailers interviewed completely agreed to that statement.

"A branded Lebanese fish product, captured/raised with high environmental standards in the south region, would occupy an important display in our retail stores"

2 out of 4 retailers do not agree with that statement, while the rest is undecided.

Executive Summary (En/Ar)

Consumer Profile:
The sample is representative of the Greater Beirut area residents; the average age of fish/seafood consumers is 38 years given a bracket between 18 and 64, with average household gross income of 1,860 USD and an average household size of 4 persons. 30% of the sample have no personal income, mainly females above the age of 55. 6% have less than 500 USD monthly income, while 32% make above 1000 USD per month. The average personal income is 797.57 USD

Eating Fish: The Habits, Attitudes, and Perceptions
On average, fish/seafood consumers in Greater Beirut Area eat fish, regardless of location or occasion, around 3 times a month. Around half these consumers eat fish/seafood indoors, and they go out to have fish/seafood around 2 times a month. Those who consume outdoors do so around twice a month, with the larger share of people (48%) going out once a month. Moreover, on average, it normally costs each person 27.43$ to go out and have fish/seafood. It is worthy to mention that the highest average per person (31.76$) is paid by those whose household income varies between 2000 and 2500$.
More than half the consumers (54%) prefer to eat **fried** fish/seafood, 38% prefer it **grilled,** whereas, a few prefer it **raw**.

When eating out, the reputation of the restaurant is the most important attribute considered by the consumers, followed by the taste of the fish/seafood. The origin of the fish/seafood is also very important to consumers, whereas the price of the portion or plate holds the least importance.

For those who considered the origin of the fish/seafood important, the majority preferred the source to be local and not imported, mainly from the South (Saida,Tyre).

Consumers of Greater Beirut Area, consider that they eat fish because it is healthy mostly. However, they are not willing to pay more for fresh fish rather than froze

Buying Fish: The Habits, Attitudes, and Perceptions
On average, consumers buy fish/seafood around 2 times per month, with the larger share (36%) buying fish/seafood once a month, mainly from fisheries and fish markets. 20% of buyers get their fish and seafood from major retailers, such as O&C and Spinneys to name a few
Bottom/Demersal Fish is the most purchased fish category, followed by Juvenile species and then shrimps.

For these two categories, more than half the consumers prefer if the origin is Local, whereas for other categories the majority has no preference, it is also more favorable to buy these two categories fresh, as well as for other categories.

Captured fish is more preferred when choosing fish/seafood to buy rather than aquaculture; as it is not too familiar among people. As for the method of processing, having the fish gutted has the highest preference.

On average, consumers spend around 63$ per month on buying fish/seafood. Per one visit, they buy around 3kgs of fish/seafood. Household incomes ranging between 2501-3000 buy the highest amount average of 86.65$ per month

When buying fish, “the origin” is the most important attribute to consider, followed by the species/kinds, it is worth noting that the price is not as important as the previous two attributes

The majority of consumers prefer to buy local fish, mainly from South area (Saida, Tyre)

Fish and Seafood Consumption Habits & Attitudes - Greater Beirut May 2017

A total of 104 businesses and point of sales were interviewed, constituting 50 restaurants, 50 fisheries, and 4 major retailers.

- The 4 interviewed retailers have a total of 27 branches, mostly in the Metn area.
- An average of 1200 customers per month visit the restaurants during the summer, and an average of 502 customers visit during the winter. These restaurants employ an average of 35 employees.

Fisheries and Fish Markets

Frequency of purchase

Most purchased products among Fishery/Fish Markets are **Fresh Fish**, mostly purchased **on a daily basis**, followed by Fresh Shrimps (mostly purchased 2-3 times a week), Fresh Mollusks/Cephalopods, Frozen Shrimps and Frozen Fish mostly purchased once a week.

Quantity and Price of Purchase

Fisheries/Fish Markets purchase an average of 60 Kilos of Fresh Fish in every transaction, at an average kilo price of 11.55$. They also purchase an average of 36 Kilos of Frozen Fish at 8.67$ per kilo on average. Third mostly purchased product is Frozen Shrimps, with an average of 31.4 Kilos per purchase, at an average kilo price of 11.67$. Highest prices are for Fresh Mollusks/Cephalopods and Fresh Shrimps, at an average kilo price of 18.35$ and 15.14$ respectively.

Source of Products

The vast majority of Fisheries/Fish Markets get their products locally, mainly from the Karantina fish market in Beirut, and from Saida and Tyr in the south. Only 1 fishery/Fish Market imports Fresh Shrimps from Dubai.

Restaurants

Frequency of purchase

Most purchased products among Restaurants are **Fresh Fish**, mostly purchased **on a daily basis**, followed by Fresh Shrimps (mostly purchased once a week), Other Fresh Crustaceans and Fresh Mollusks/Cephalopods (mostly purchased once a week), Frozen Fish and Frozen Shrimps, mostly purchased every month.

Quantity and Price of Purchase

Restaurants purchase an average of 30 Kilos of Fresh Fish in every transaction, at an average kilo price of 19.2$ (highest price for a seafood product). They also purchase an average of 24.6 Kilos of Frozen Fish at 11.6$ per kilo on average. Third mostly purchased product is Frozen Shrimps, with an average of 26 Kilos per purchase, at an average kilo price of 9.5$. Apart from Fresh Fish, highest prices are for Fresh Mollusks/Cephalopods, Other Frozen and Fresh Crustaceans, at an average kilo price of 15$, 14.6$ and 14.4$ respectively.

Source of Products

The vast majority of Restaurants get their products locally, mainly from the Karantina fish market in Beirut, and from Tyr in the south, except for when it comes to Fresh Fish and Other Fresh Crustaceans, which are mostly from Saida and Tyr. When the product is not local countries of import consist of Dubai, Turkey, KSA, and France.

Retailers

Frequency of purchase

Most purchased products among Large Retailers are Fresh Fish, Fresh Shrimps, Other Fresh Crustaceans and Fresh Mollusks/Cephalopods, Processed Seafood and Frozen Fish. Other Frozen Crustaceans and Frozen Mollusks/Cephalopods are also bought, to a lesser extent. It is worthy to mention that all interviewed retailers purchase Canned Fish once a month.

Quantity and Price of Purchase

Retailers purchasing prices are considerably lower than that of Restaurants and Fisheries/Fish Markets, with an average of 9.4$ per kilo of Fresh Fish (Vs. 11.55$ and 19.2$ for Fisheries/Fish Markets and Restaurants respectively). However, they mostly stock up on frozen items more than fresh items (mostly processed seafood, of which they purchase an average of 70 Kilos per transaction)

Source of Products

The vast majority of Large Retailers get their products locally

Fish & Seafood Retail Purchase – Suppliers

For **fresh fish**, the top suppliers are:
Tyr, Karantina, Saida, Sarafand and Nakoura
And the top three criteria for selecting a supplier are:

- A supplier that provides **fresh** seafood and fish
- Provides these products at a **competitive price**
- And can deliver **big quantities** whenever needed

Same for **fresh shrimps**, when it comes to the top suppliers. And also for the selection criteria, however providing big amounts of fish/seafood comes in second place followed by the competitive prices.

Regarding **frozen fish** as well as **frozen shrimps**, the top supplier is Karantina. And the criteria for choosing a supplier are:

- Providing **competitive prices**
- Delivering and providing **large amounts**
- Providing **good quality**

Fish & Seafood Retail Purchase – Agreement on Attributes

The larger share of businesses prefer to sell captured/raised fish per high environmental standards – Fisheries/Fish Markets agree more than the other businesses. They do not consider, however, that fresh local fish is cheaper than imported.
"*For frozen/processed fish/seafood we prefer a local supplier"*
Only 1 out of the 4 retailers interviewed completely agreed to that statement.
"A branded Lebanese fish product, captured/raised with high environmental standards in the south region, would occupy an important display in our retail stores"
2 out of 4 retailers do not agree with that statement, while the rest is undecided.

العيّنة ممثلة لسكّان منطقة بيروت الكبرى. يبلغ متوسط عمر مستهلكي الأسماك / المأكولات البحرية 38 سنة، وذلك في إطارالفئة العمريّة بين 18 و 64 سنة، ويبلغ متوسط دخل الأسرة المعيشية 1,860 دولاراً أمريكيّاً، ويبلغ متوسط حجم الأسرة 4 أشخاص. 30%من العيّنة ليس لديهم دخل شخصي، خاصّة الإناث فوق سن 55 عاماً. 6% لديهم دخل شهري أقل من 500 دولار أمريكي، في حين أن 32% منهم يتجاوزون 1,000 دولار أمريكي شهريا. متوسّط الدخل الشخصي هو 797.57 دولار أمريكي.

تناول الأسماك: العادات والمواقف والتصوّرات

كمعدّل، يأكل مستهلكو الأسماك / المأكولات البحرية في منطقة بيروت الكبرى الأسماك، بغضّ النظر عن الموقع أو المناسبة، حوالي ثلاث مرات في الشهر. حوالي نصف هؤلاء المستهلكين يأكلون الأسماك / المأكولات البحرية في المنزل، ويخرجون لتناول الأسماك / المأكولات البحرية حوالي مرّتين في الشهر. أولئك الذين ويخرجون لتناول الأسماك / المأكولات البحرية يخرجون حوالي مرتين في الشهر، مع حصة أكبر من الناس (48%) يخرجون مرّة واحدة في الشهر.
وعلاوة على ذلك، كمعدّل ، فإنّه يكلّف عادةً كلّ شخص 27.43 $ للخروج و تناول الأسماك / المأكولات البحرية. ومن الجدير بالذكر أن أعلى متوسط للفرد (31.76 دولاراً) يدفعه الذين يتفاوت دخل أسرهم بين 2,000و 2,500دولار.
أكثر من نصف المستهلكين (54%) يفضلون تناول الأسماك / المأكولات البحرية مقليّة، و (38%) يفضلون المشوية، في حين أن عدد قليل يفضلون النيّئة.

عند تناول الطعام في الخارج، وسمعة المطعم هي السمة الأكثر أهميّة التي يأخذها المستهلكون بعين الاعتبا، يليها طعم الأسماك / المأكولات البحرية. مصدر الأسماك / المأكولات البحرية هو أيضا مهم جدا للمستهلكين، في حين أن السعر الوجبة أو الطبق يحمل أقلّ أهميّة.
أما بالنسبة لأولئك الذين اعتبروا مصدر الأسماك / المأكولات البحرية مهمّ، فإن الأغلبية يفضلون أن يكون المصدر محليّاً وليس مستورداً، اجمالاً من الجنوب (صيدا، صور).
المستهلكون في منطقة بيروت الكبرى، يعتبرون أنهم يأكلون الأسماك لأنها صحيّة في الغالب. ومع ذلك، فهم ليسوا الى استعداد لدفع المزيد على ألأسماك الطازجة بدلاً من المجلّدة.

شراء الأسماك: العادات والمواقف والتصورات:
كمعدّل، يشتري المستهلكون الأسماك / المأكولات البحرية حوالي مرتين في الشهر، حيث تشترى الحصّة الأكبر (36 في المائة) الأسماك / المأكولات البحرية مرّة في الشهر، ولا سيّما من أسواق الأسماك المسامك. ويشتري 20% من المستهلكون الأسماك والمأكولات البحرية من تجار التجزئة الكبار.
الألسماك السفلية / القاعية هي فئة الألسماك الأكثر شراءاً، تليها الأنواع الصغيرة ثم الروبيان.
وبالنسبة لهاتين الفئتين، أكثر من نصف المستهلكين يفضلون إذا كان مصدرها محلّي، في حين أنّه ليس هناك تفضيل للفئات الأخرى، مع تفضيل لشراء هاتين الفئتين الطازجة، وكذلك لفئات أخرى.
والأسماك المصطادة هي الأكثر تفضيلاً عند اختيار شراء الأسماك / المأكولات البحرية بدلاً من تلك التي في المزارع المائية؛ كونها ليست مألوفة جداً بين الناس. أما بالنسبة لطريقة المعالجة، فإن وجود الأسماك (المنظّفة) لديها تفضيلاً أعلى.

كمعدّل، ينفق المستهلكون حوالي 63 دولاراً شهرياً على شراء الأسماك / المأكولات البحرية. في زيارة واحدة، يشترون حوالي 3Kg من الأسماك / المأكولات البحرية. مدخول الأسرة المتراوح بين 2,501 $ -3,000 $ يشترون أعلى مبلغ متوسط 86.65 $ شهرياً.

عند شراء الأسماك، "المصدر" هو في السمة الأكثر أهمية، تليها الأصناف / أنواع، تجدر الإشارة إلى أن السعر ليس مهما كما السمتين السابقتين.

غالبية المستهلكين يفضلون شراء الأسماك المحلية، من منطقة الجنوب (صيدا، صور) أساسيّاً.

تمت مقابلة 104 شركة ونقاط بيع، وشكلت 50 مطعماً، و 50 مسمكة، و 4 تجار تجزئة رئيسيين.

- بلغ عدد تجار التجزئة الذين تمت مقابلتهم 4 ، لديهم 27 فرعا، معظمهم في منطقة المتن.
- يزور المطعم كمعدّل شهري 1,200 شخص خلال فصل الصيف، و معدّل 502 زبون خلال فصل الشتاء. وتستخدم هذه المطاعم ما ممعدّله 35 موظفاً.

أسواق الأسماك والمسامك
وتيرة الشراء

معظم المنتجات المشتراة بين أسواق الأسماك/ المسامك هي الأسماك الطازجة، في الغالب يومياً، يليها الروبيان الطازج (التي يتم شراؤها في الغالب 2-3 مرّات في الأسبوع)، الصدفيّات / الرخويات الطازجة، الروبيان المجلّد والأسماك المجلّدة يتمّ شراؤها في الغالب مرّة واحدة في الأسبوع.

كمية وسعر الشراء

وتقوم أسواق السمك /المسامك بشراء 60 كيلوغراما من السمك الطازج في كل عملية شراء، و سعرالكيلوغرام 11.55 $ كمعدّل. كما أنها تشتري ما معدّله 36 كيلوغراما من الأسماك المجلّدة بسعر معدّله 8.67 $. أما المنتج الثالث الذي تم شراؤه في الغالب فهو الروبيان المجلّد، بمعدّل 31.4 كيلوغرام لكل عملية شراء، بسعر كيلو متوسط قدره 11.67 $. أعلى الأسعار هي للصدفيّات / الرخويات الطازجة، بسعر متوسط للكيلو 18.35 $ و 15.14 $ على التوالي.

مصدر المنتجات
وتحصل الغالبية العظمى من أسواق السمك /المسامك على منتجاتها محليّاً، خاصة من سوق سمك كارنتينا في بيروت، ومن صيدا و صور في الجنوب. فقط سوق السمك / مسمكة واحد تستورد الروبيان الطازج من دبي.

مطاعم
وتيرة الشراء
أكثر المنتجات التي تم شراؤها من قبل مطاعم هي الأسماك الطازجة، التي تم شراؤها في الغالب على أساس يومي، تليها الروبيان الطازج (شراؤها في الغالب مرة واحدة في الأسبوع)، و لقشريات الطازجة و الصدفيّات / الرخويات الطازجة (يتمّ شراؤها في الغالب مرّة واحدة في الأسبوع)، والأسماك المجلدة والروبيان المجلد ، معظمها مشتراة كل شهر.

الكميّة وسعر الشراء
تشتري المطاعم ما معدّله 30 كيلوغراماً من السمك الطازج في كل عمليّة شراء بسعر يبلغ معدّله 19.2$ (أعلى سعر لمنتج المأكولات البحرية). كما أنها تشتري ما معدّله 24.6 كيلوغراماً من الأسماك المجلّدة بمعدّل 11.6$ للكيلوغرام. المنتج الثالث الأكثر شراءاً هو الروبيان المجلّد، بمعدّل 26 كيلوغراماً للشراء بمعدّل 11.6$ للكيلوغرام. باستثناء الأسماك الطازجة، الأسعارالأعلى هي للرخويات / الصدفيّات الطازجة، والقشريات الطازجة و المجلّدة الأخرى، بمعدّل سعر الكيلو من 15 $، 14.6 $ و 14.4 $ على التوالي.

مصدر المنتجات
الغالبيّة العظمى من المطاعم تحصل على منتجاتها محليّاً، وخاصّة من سوق سمك كارنتينا في بيروت، ومن صور في الجنوب، باستثناء الأسماك الطازجة وغيرها من القشريات الطازجة، والتي هي في الغالب من صيدا وصور. عندما لا يكون المنتج محليّاً، تكون بلدان الاستيراد مكوّنة من دبي، تركيا، المملكة العربية السعودية وفرنسا.

تجّار التجزئة
وتيرة الشراء
معظم المنتجات المشتراة بين تجّار التجزئة الكبيرة هي الأسماك الطازجة، الروبيان الطازج، القشريات الطازجة الأخرى والرخويات / الصدفيّات، الأسماك المجلّدة و المأكولات البحريّة المعالجة. كما يتم شراء القشريّات الأخرى المجلّدة والرخويات / الصدفيّات ، بحدٍ أقلّ. ومن الجدير بالذكر أنّ جميع تجّار التجزئة الذين تمت مقابلتهم يشترون الأسماك المعلبة مرة واحدة في الشهر.

الكميّة وسعر الشراء
أما أسعار شراء تجّار التجزئة فهي أقلّ بكثير من أسعارالمطاعم و أسواق السمك /المسامك بمعدّل 9.4 $ للكيلو الواحد من الألسماك الطازجة (مقارنةً ب11.55 $ و 19.2 $ أسواق السمك /المسامك والمطاعم على التوالي).
ومع ذلك، فإنها غالباً ما تخزّن المنتجات المجلّدة أكثر من المواد الطازجة (معظمها من المأكولات البحرية المعالجة، التي يشترون منها ما معدّله 70 كيلو لكل عملية بيع).

مصدر المنتجات
الغالبية العظمى من تجّار التجزئة الكبيرة تحصل على منتجاتها محليّاً.

شراء التجزئة للأسماك والمأكولات البحرية - الموردين
وبالنسبة للأسماك الطازجة، فإن كبار المورّدين هم:
صور، كارنتينا، صيدا، الصرفند، الناقورة
وأعلى ثلاثة معايير لاختيار مورّد هي:
- مورّد يقدم المأكولات البحريّة والأسماك الطازجة
- تأمين هذه المنتجات بسعر تنافسي
-يمكنه تسليم كميّات كبيرة كلما دعت الحاجة

الحالة ذاتها بالنسبة **للروبيان الطازج**، عندما يتعلق الأمر إلى كبار الموردين. وأيضا لمعايير الاختيار، ولكن توفير كميات كبيرة من الأسماك / المأكولات البحرية يأتي في المركز الثاني تليها أسعار تنافسيّة.

وفيما يتعلق بالأسماك المجلّدة وكذلك الروبيان المجلّد، فإن المورّد الأكبر هو الكارانتينا. ومعايير اختيار المورّد هي:
- توفير أسعار تنافسية
- تسليم وتقديم كميّات كبيرة
- توفير نوعية جيدة

شراء التجزئة للأسماك والمأكولات البحرية - اتفاق على سمات
الحصة الأكبر من الشركات تفضّل بيع الأسماك التي يتم صيدها / تربيتها وفقاً لمعايير بيئية عالية - تتّفق المسامك / أسواق الأسماك أكثر من غيرها من الأعمال. غير أنها لا تعتبر أن الأسماك المحلية الطازجة أرخص من المستوردة.
"بالنسبة للأسماك المجلّدة / المعالجة / المأكولات البحرية نحن نفضل المورد المحلي"
ووافق تاجر تجزئة واحد من الأربعة الذين تمت مقابلتهم تماماً على هذا التصريح.

وأضاف: "من شأن المنتجات السمكية اللبنانية، التي تم التقاطها / تربيتها وفقاً لمعايير بيئية عالية في المنطقة الجنوبية، أن تشغل عرضاً مهما في متاجرنا"

2 من 4 تجّار التجزئة لا يوافق على هذا التصريح ، في حين أن البقية متردّدة.

Analysis and Recommendations

The ground is already set to target the Greater Beirut Area, and introduce what Tyr has to offer, from fish and other seafood products; a suitable branding and marketing campaign would raise awareness regarding Tyr and the fishing & seafood industry in Lebanon and put forth a modernized concept with high environmental standards.

The population in this area are frequent consumers of fish, and they are exposed to various fish/seafood categories from which they purchase what they need, they have the tendency to try new kinds of fish and new types of products.

They have a significant tendency to select fish/seafood from a local source rather than imported, they consider that it is of a higher quality and a healthy choice.

Although our society is price sensitive to different products and sectors in general, people acknowledge that consuming and purchasing fish is somehow expensive, however, given their frequency of eating and buying fish, and the amounts spent eating out on average and their inclination of buying in bulks, the price of fish/seafood is not considered as important as another attribute such as the origin, the taste or the freshness…

People surveyed, especially those belonging to older generations (35 and above), consume fish indoors and outdoors, and while outdoors the restaurant's reputation plays a role, but indoors; given the process of preparing and cooking fish, people would prefer to buy fresh, clean looking (gutted), local fish from the South of Lebanon (Saida, Tyre), however for some, given the choice they would switch to frozen if the price difference was huge.

Thus highlighting all these aspects in a fish/seafood product is very important, when introducing a new concept.

Fresh Fish is an important commodity for the Lebanese F&B/retail businesses (restaurants, fisheries, fish markets mainly), they purchase significant amounts daily this frequency is a signal for high consumption levels by the end consumer. Fresh fish is mostly purchased from local sources, although it is considered more expensive from imported sources. Talking in general regarding imported fish, some fisheries explained that they would purchase imported and sell them as "local" fish to consumers and thus profit more, highlighting here the tendency of end consumers to buying/preferring to buy local fresh fish.

For restaurants and fisheries, satisfying the demand entails obtaining appropriate quantities of fresh products (fresh fish/shrimps/crustaceans) from one or two suppliers mainly.

These businesses do care about a supplier's ability to provide big quantities, on a regular basis/whenever needed, at a competitive price and providing products (especially shrimps…) of a good quality.

Tyr/Tyr port/fisheries in Tyr/ Tyr beach… and other mentions of the same region were revealed spontaneously by different businesses as being the top supplier for fresh fish/seafood.

However, for the few retailers targeted, an interest in a branded local product from Tyr was not very high, as they rely mostly on supplying frozen product in bigger quantities than their fresh selection. Their supply comes in from local sources however they don't completely prefer to purchase frozen products from a local supplier.

Keeping all these aspects and insights in mind, Fisheries, and fishermen of Tyr can target the restaurants, fisheries and fish markets of close by areas in the South, and Greater Beirut area strategically and supply for growing demand for good quality fresh fish/seafood.

Developing a branding strategy is considered essential for the aquaculture in Lebanon, and in Tyr specifically.
The vision and mission of the branding strategy are to support this artisan industry in creating distribution channels for their branded product and reach the widest spectrum of consumers and businesses.
Thus "*SAMAK MIN SOUR"*a fresh, safe, and legally captured brand from Tyr.
The logo and brand name would be in Arabic and easy on the ear; from our daily Lebanese dialect. The colors chosen mostlyare BLUE, conveying sea color, love, trust…
Silver reflecting grace and glamour, and finally black color.
The slogan mainly would aim at the stories fishermen live during their daily work, and how they face the sea and capture different species. Same color choices would be chosen.
The product will be displayed in polymers and cling-film to showcase each type and reflect freshness. The logo, theslogan would be displayed as well.
Raising awareness is very important at first stage to implement this brand strategy, through different promotion activities, participation in exhibitions, creating a website and social media buzz…

Introduce "*SAMAK MIN SOUR"* to the Lebanese public, as a branded fresh and healthy fish from the beautiful clean shores of Tyr!!

Annex 1QUANT

Table 1

	Total Household Income									
	TOTAL	$ 5001-$ 7000	$ 3001-$ 5000	$ 2501-$ 3000	$ 2001-$ 2500	$ 1501-$ 2000	$ 1001-$ 1500	$ 751-$ 1000	$ 501-$ 750	No answer
Sample	225	2	8	50	51	47	35	22	2	8
Q1B - On average how much does it normally cost you per person in DOLLARS?										
7	>	-	-	-	-	-	3%	-	-	-
8	1%	-	-	-	-	2%	3%	-	-	-
10	8%	-	-	12%	6%	2%	11%	18%	-	-
11	2%	-	-	-	-	4%	3%	5%	-	-
12	4%	-	-	4%	4%	6%	-	9%	-	-
13	3%	-	-	4%	2%	2%	6%	-	-	-
14	1%	-	-	-	4%	-	3%	-	-	-
15	7%	-	-	6%	8%	9%	6%	5%	50%	-
17	>	-	-	-	-	2%	-	-	-	-
18	>	-	-	-	-	-	3%	-	-	-
20	16%	50%	13%	20%	14%	6%	29%	18%	-	-
22	>	-	-	-	-	-	-	5%	-	-
25	8%	-	-	6%	4%	17%	11%	9%	-	-
28	1%	-	-	-	-	-	6%	-	-	-
30	20%	50%	25%	18%	12%	32%	9%	23%	-	38%
33	>	-	13%	-	-	-	-	-	-	-
35	4%	-	-	2%	10%	2%	-	-	-	13%
40	11%	-	25%	14%	20%	2%	9%	-	50%	13%
45	4%	-	13%	4%	4%	4%	-	5%	-	25%
50	6%	-	13%	8%	8%	6%	-	5%	-	13%
70	1%	-	-	2%	2%	-	-	-	-	-
80	1%	-	-	-	4%	2%	-	-	-	-
Average	27.43	25	36	27.5	31.76	27.04	20.57	22.14	27.5	38.13
Standard deviation	13.88	7.07	9.61	13.88	16.68	13.43	8.91	11.15	17.68	7.99

Table 2

	Total Household Income								
	$ 5001-$ 7000	$ 3001-$ 5000	$ 2501-$ 3000	$ 2001-$ 2500	$ 1501-$ 2000	$ 1001-$ 1500	$ 751-$ 1000	$ 501-$ 750	No answer
Sample	**4**	**14**	**72**	**98**	**119**	**128**	**50**	**7**	**14**
Q7 - On average per month, how much do you spend on buying fish/seafood DOLLARS?									
10	25%	-	4%	3%	3%	5%	6%	-	-
12	-	-	-	-	2%	1%	2%	-	-
13	-	-	-	-	-	1%	-	-	-
14	-	-	-	2%	-	2%	-	-	-
15	-	-	-	2%	5%	3%	6%	14%	-
16	-	-	3%	-	-	-	-	-	-
17	-	-	-	-	1%	-	-	-	-
18	-	7%	-	2%	3%	3%	4%	-	-
20	-	21%	7%	8%	12%	10%	6%	-	21%
22	-	-	1%	1%	2%	1%	-	14%	-
23	-	-	1%	-	-	-	-	-	-
24	-	-	-	-	-	2%	2%	-	-
25	-	-	3%	2%	3%	3%	2%	-	-
27	-	-	-	-	-	1%	-	-	-
28	-	-	-	-	-	-	-	-	7%
30	25%	-	7%	6%	10%	14%	24%	14%	7%
32	-	-	-	-	1%	-	-	-	-
33	-	-	-	-	-	-	-	14%	-
35	-	-	-	1%	1%	2%	-	-	-
38	-	-	-	-	1%	1%	-	-	-
40	-	-	4%	7%	11%	13%	8%	-	-
45	-	-	-	-	1%	-	-	-	-
50	-	7%	6%	9%	10%	8%	4%	-	-
60	25%	7%	4%	2%	4%	3%	4%	-	-
65	-	-	-	-	-	1%	-	-	7%
66	-	-	-	-	-	1%	-	-	7%

ADR Fish and Seafood Consumption Habits & Attitudes - Greater Beirut

May 2017

	Total Household Income								
	$ 5001-$ 7000	$ 3001-$ 5000	$ 2501-$ 3000	$ 2001-$ 2500	$ 1501-$ 2000	$ 1001-$ 1500	$ 751-$ 1000	$ 501-$ 750	No answer
Sample	4	14	72	98	119	128	50	7	14
Q7 - On average per month, how much do you spend on buying fish/seafood DOLLARS?									
70	-	14%	4%	3%	3%	5%	4%	14%	14%
75	-	-	1%	1%	-	2%	4%	-	-
76	-	-	-	-	1%	-	-	-	-
79	-	-	-	-	1%	-	-	-	-
80	-	7%	7%	9%	4%	5%	-	14%	-
85	-	-	-	1%	-	-	-	-	-
90	-	-	4%	3%	-	4%	-	-	-
95	-	-	1%	2%	1%	-	-	-	-
100	-	21%	7%	10%	11%	5%	8%	-	21%
102	-	-	1%	-	-	-	-	-	-
110	-	-	-	-	1%	-	-	-	-
116	-	-	-	-	1%	-	-	-	-
117	-	-	-	1%	-	-	-	-	-
120	-	-	3%	3%	2%	1%	2%	-	-
125	-	-	-	1%	1%	-	-	-	-
130	-	-	8%	5%	3%	1%	2%	-	-
133	-	-	-	-	-	1%	-	-	-
140	-	-	1%	1%	-	1%	-	-	-
145	-	-	-	-	-	1%	-	-	-
150	-	7%	10%	5%	3%	-	6%	-	-
160	25%	-	1%	2%	1%	-	-	14%	-
170	-	-	-	-	-	1%	2%	-	-
180	-	7%	7%	4%	1%	-	2%	-	14%
200	-	-	1%	1%	-	-	2%	-	-
210	-	-	1%	-	-	-	-	-	-
NA	-	-	-	1%	-	-	-	-	-
Average	65	74.14	86.65	76.04	54.71	47.21	58.24	58.57	74.93
Standard deviation	66.58	49.43	55.61	49.2	39.65	33	50.53	50.96	53.68

Annex 2QUAL

Table 1

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	98	48	47	3	24	21	25	12	8	8
Q1D1 - Specify region - Fresh fish										
Batroun	3%	6%	-	-	-	-	-	25%	-	-
Beirut	1%	2%	-	-	4%	-	-	-	-	-
Bouar	1%	-	-	33%	-	-	-	-	13%	-
Dora	1%	-	-	33%	-	-	-	8%	-	-
Dubai	1%	2%	-	-	-	5%	-	-	-	-
Jbeil	1%	2%	-	-	-	-	4%	-	-	-
Jiyeh	1%	2%	-	-	-	-	-	-	-	13%
Jouneh	2%	-	4%	-	-	-	-	17%	-	-
Karantina	15%	19%	13%	-	17%	-	4%	17%	75%	25%
Ouzaii	2%	4%	-	-	4%	-	-	-	-	13%
Raouche	1%	2%	-	-	4%	-	-	-	-	-
Saida	30%	25%	34%	33%	38%	-	60%	17%	-	38%
Sarafand	8%	10%	6%	-	-	10%	24%	-	-	-
Tyre	31%	21%	43%	-	29%	86%	8%	17%	13%	-
Turkey	1%	2%	-	-	4%	-	-	-	-	-

Table 2

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	84	39	42	3	24	19	20	10	5	6
Q1D2 - Specify region - Fresh shrimps										
Batroun	1%	3%	-	-	-	-	-	10%	-	-
Beirut	2%	5%	-	-	8%	-	-	-	-	-
Bouar	3%	5%	-	33%	-	-	-	20%	20%	-
Dora	1%	-	-	33%	-	-	-	10%	-	-
Dubai	4%	5%	2%	-	4%	5%	-	-	-	17%
Jbeil	1%	3%	-	-	-	-	5%	-	-	-
Jiyeh	1%	3%	-	-	-	-	-	-	-	17%
Jouneh	1%	-	2%	-	-	-	-	10%	-	-
Karantina	24%	21%	29%	-	29%	5%	25%	20%	80%	17%
Ouzaii	2%	5%	-	-	4%	-	-	-	-	17%
Raouche	1%	3%	-	-	4%	-	-	-	-	-
Saida	18%	15%	19%	33%	8%	5%	45%	20%	-	17%
Sarafand	4%	5%	2%	-	-	-	15%	-	-	-
Tyre	33%	26%	43%	-	38%	84%	10%	10%	-	-

Table 3

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	63	30	30	3	19	14	15	8	4	3
Q1D3 - Specify region - Other fresh crustaceans (crab, lobster)										
Africa	2%	3%	-	-	5%	-	-	-	-	-
Baabda	2%	3%	-	-	-	-	7%	-	-	-
Batroun	3%	7%	-	-	-	-	-	25%	-	-
Beirut	3%	7%	-	-	11%	-	-	-	-	-
Bouar	4%	3%	-	33%	-	-	-	13%	25%	-
Dora	2%	-	-	33%	-	-	-	13%	-	-
Jbeil	2%	3%	-	-	-	-	7%	-	-	-
Jiyeh	2%	3%	-	-	-	-	-	-	-	33%
Jouneh	2%	-	3%	-	-	-	-	13%	-	-
Karantina	21%	10%	33%	-	26%	7%	13%	25%	75%	-
KSA	2%	3%	-	-	-	7%	-	-	-	-
Nakoura	3%	-	7%	-	-	14%	-	-	-	-
Ouzaii	2%	3%	-	-	5%	-	-	-	-	-
Raouche	2%	3%	-	-	5%	-	-	-	-	-
Saida	22%	20%	23%	33%	26%	-	47%	13%	-	33%
Sarafand	3%	7%	-	-	-	-	13%	-	-	-
Tyre	24%	20%	30%	-	16%	71%	13%	-	-	-

Table 4

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	65	31	31	3	20	14	15	9	4	3
Q1D4 - Specify region - Fresh Mollusks cephalopods (octopus, calamari…)										
Baabda	2%	3%	-	-	-	-	7%	-	-	-
Batroun	3%	6%	-	-	-	-	-	22%	-	-
Beirut	2%	3%	-	-	5%	-	-	-	-	-
Bouar	4%	3%	-	33%	-	-	-	11%	25%	-
Dora	2%	-	-	33%	-	-	-	11%	-	-
Jbeil	2%	3%	-	-	-	-	7%	-	-	-
Jiyeh	2%	3%	-	-	-	-	-	-	-	33%
Jounieh	2%	-	3%	-	-	-	-	11%	-	-
Karantina	23%	13%	35%	-	30%	7%	20%	22%	75%	-
KSA	3%	6%	-	-	5%	7%	-	-	-	-
Nakoura	2%	-	3%	-	-	7%	-	-	-	-
Ouzaii	2%	3%	-	-	5%	-	-	-	-	-
Raouche	2%	3%	-	-	5%	-	-	-	-	-
Saida	22%	16%	26%	33%	25%	7%	40%	11%	-	33%
Sarafand	3%	6%	-	-	-	-	13%	-	-	-
Tyre	26%	26%	29%	-	20%	71%	13%	11%	-	-

Table 5

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	27	11	13	3	8	3	3	9	3	1
Q1D5 - Specify region - Fresh Shellfish (mussels scallops)										
Batroun	7%	18%	-	-	-	-	-	22%	-	-
Bouar	11%	18%	-	33%	13%	-	-	11%	33%	-
Dora	4%	-	-	33%	-	-	-	11%	-	-
Dubai	4%	9%	-	-	13%	-	-	-	-	-
Jbeil	4%	9%	-	-	-	-	33%	-	-	-
Jouneh	4%	-	8%	-	-	-	-	11%	-	-
Karantina	33%	18%	54%	-	25%	33%	33%	33%	67%	-
Ouzaii	4%	9%	-	-	13%	-	-	-	-	-
Saida	11%	-	15%	33%	25%	-	-	11%	-	-
Tyre	11%	9%	15%	-	-	67%	33%	-	-	-

Table 6

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	77	41	32	4	22	14	12	12	10	7
Q1D6 - Specify region - Frozen fish (frozen fillet…)										
Baabda	1%	-	3%	-	-	-	-	8%	-	-
Batroun	5%	10%	-	-	-	-	-	25%	-	14%
Bouar	1%	2%	-	-	5%	-	-	-	-	-
Dubai	3%	5%	-	-	5%	7%	-	-	-	-
Jbeil	1%	2%	-	-	-	-	8%	-	-	-
Jiyeh	1%	2%	-	-	5%	-	-	-	-	-
Karantina	34%	27%	47%	-	50%	14%	25%	25%	70%	-
Ouzaii	3%	5%	-	-	5%	-	-	-	-	14%
Saida	13%	10%	16%	25%	9%	-	50%	8%	-	14%
Sarafand	3%	2%	3%	-	-	7%	8%	-	-	-
Tyre	19%	27%	9%	25%	9%	71%	-	17%	10%	-
Turkey	3%	-	-	50%	-	-	-	8%	10%	-

Table 7

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	74	34	36	4	21	17	13	8	10	5
Q1D7 - Specify region - Frozen shrimps										
Baabda	1%	-	3%	-	-	-	-	13%	-	-
Batroun	3%	6%	-	-	-	-	-	25%	-	-
Beirut	3%	-	6%	-	-	12%	-	-	-	-
Bouar	1%	3%	-	-	5%	-	-	-	-	-
Dubai	1%	-	-	25%	-	-	-	13%	-	-
Jiyeh	1%	3%	-	-	-	-	-	-	-	20%
Karantina	32%	29%	39%	-	52%	12%	23%	13%	60%	20%
KSA	1%	-	-	25%	-	-	-	-	10%	-
Ouzaii	1%	3%	-	-	5%	-	-	-	-	-
Saida	14%	9%	17%	25%	10%	-	46%	13%	-	20%
Sarafand	4%	9%	-	-	-	-	23%	-	-	-
Tyre	23%	26%	19%	25%	14%	71%	-	13%	10%	-
Turkey	3%	6%	-	-	5%	6%	-	-	-	-

Table 8

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	**24**	**9**	**11**	**4**	**5**	**6**	**0**	**5**	**6**	**2**
Q1D8 - Specify region - Other frozen crustaceans (crab, lobster)										
Baabda	**4%**	**-**	**9%**	**-**	**-**	**-**	**-**	**20%**	**-**	**-**
Batroun	**4%**	**11%**	**-**	**-**	**-**	**-**	**-**	**20%**	**-**	**-**
Beirut	**8%**	**-**	**18%**	**-**	**-**	**33%**	**-**	**-**	**-**	**-**
France	**8%**	**11%**	**-**	**25%**	**-**	**17%**	**-**	**-**	**17%**	**-**
Jiyeh	**4%**	**11%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**50%**
Karantina	**25%**	**33%**	**27%**	**-**	**40%**	**17%**	**-**	**-**	**50%**	**-**
Ouzaii	**4%**	**11%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**50%**
Saida	**13%**	**-**	**18%**	**25%**	**40%**	**-**	**-**	**20%**	**-**	**-**
Tyre	**13%**	**22%**	**-**	**25%**	**-**	**33%**	**-**	**-**	**17%**	**-**
Turkey	**4%**	**-**	**-**	**25%**	**-**	**-**	**-**	**20%**	**-**	**-**

Table 9

	Respondent Type				Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	30	13	13	4	12	7	0	3	6	2
Q1D9 - Specify region - Frozen Mollusks cephalopods (octopus, calamari…)										
Beirut	17%	23%	15%	-	25%	29%	-	-	-	-
France	3%	-	-	25%	-	-	-	-	17%	-
Jiyeh	3%	8%	-	-	-	-	-	-	-	50%
Karantina	30%	31%	38%	-	33%	14%	-	-	50%	50%
Saida	13%	8%	15%	25%	25%	-	-	33%	-	-
Tyre	13%	23%	-	25%	-	43%	-	-	17%	-
Turkey	7%	8%	-	25%	-	14%	-	33%	-	-

Table 10

	Respondent Type				Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	4	1	1	2	1	0	0	1	1	1
Q1D10 - Specify region - Frozen Shellfish (mussels scallops)										
Dora	25%	-	-	50%	-	-	-	100%	-	-
France	25%	-	-	50%	-	-	-	-	100%	-
Jiyeh	25%	100%	-	-	-	-	-	-	-	100%
Karantina	25%	-	100%	-	100%	-	-	-	-	-

Table 11

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	**21**	**13**	**4**	**4**	**7**	**5**	**2**	**2**	**3**	**2**
Q1D11 - Specify region - Canned fish (tuna)										
Beirut	**10%**	**15%**	**-**	**-**	**29%**	**-**	**-**	**-**	**-**	**-**
France	**5%**	**-**	**-**	**25%**	**-**	**-**	**-**	**-**	**33%**	**-**
Jbeil	**5%**	**8%**	**-**	**-**	**-**	**-**	**50%**	**-**	**-**	**-**
Jiyeh	**5%**	**8%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**50%**
Karantina	**14%**	**23%**	**-**	**-**	**-**	**20%**	**-**	**-**	**33%**	**50%**
Saida	**19%**	**15%**	**25%**	**25%**	**29%**	**-**	**50%**	**50%**	**-**	**-**
Tyre	**19%**	**23%**	**-**	**25%**	**-**	**60%**	**-**	**-**	**33%**	**-**
Turkey	**10%**	**8%**	**-**	**25%**	**-**	**20%**	**-**	**50%**	**-**	**-**

Table 12

		Respondent Type			Location					
	TOTAL	Restaurant	Fishery/Fish Market	Big Retailer	Beirut	Tyr	Saida	Metn	Baabda	Aley
Sample	**25**	**13**	**8**	**4**	**7**	**6**	**1**	**4**	**5**	**2**
Q1D12 - Specify region - Processed seafood (crab sticks, fish fingers, fish escalope ...)										
Baabda	**4%**	**-**	**13%**	**-**	**-**	**-**	**-**	**25%**	**-**	**-**
Beirut	**4%**	**8%**	**-**	**-**	**14%**	**-**	**-**	**-**	**-**	**-**
Dubai	**4%**	**-**	**-**	**25%**	**-**	**-**	**-**	**25%**	**-**	**-**

France	**4%**	**-**	**-**	**25%**	**-**	**-**	**-**	**-**	**20%**	**-**
Jbeil	**4%**	**8%**	**-**	**-**	**-**	**-**	**100%**	**-**	**-**	**-**
Jiyeh	**4%**	**8%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**50%**
Karantina	**20%**	**23%**	**25%**	**-**	**14%**	**33%**	**-**	**-**	**40%**	**-**
Ouzaii	**4%**	**8%**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**50%**
Saida	**8%**	**-**	**13%**	**25%**	**14%**	**-**	**-**	**25%**	**-**	**-**
Tyre	**20%**	**31%**	**-**	**25%**	**14%**	**50%**	**-**	**-**	**20%**	**-**
Turkey	**8%**	**15%**	**-**	**-**	**14%**	**17%**	**-**	**-**	**-**	**-**

Table 13

Fish/Seafood Category	One specific supplier?		Criteria of choice (top three)		
	Yes	No	Top 1	Top 2	Top 3
Fresh fish (N=96)	51%	49%	Provides fresh fish/seafood 46%	Provides competitive prices/Competes with imported fish prices 27%	Can provide & deliver large amounts whenever/wherever needed 26%
Fresh shrimps (N=81)	57%	43%	Provides fresh fish/seafood 37%	Can provide & deliver large amounts whenever/wherever needed 33%	Provides competitive prices/Competes with imported fish prices 32%
Other fresh crustaceans (crab, lobster) (N=61)	64%	36%	Provides competitive prices/Competes with imported fish prices 39%	Can provide & deliver large amounts whenever/wherever needed 31%	Provides fresh fish/seafood 30%
Fresh Mollusks cephalopods (octopus, calamari…) (N=63)	68%	32%	Provides competitive prices/Competes with imported fish prices 43%	Can provide & deliver large amounts whenever/wherever needed 33%	Provides fresh fish/seafood 30%
Fresh Shellfish (mussels scallops) (N=26)	81%	19%	Provides competitive prices/Competes with imported fish prices 58%	Can provide & deliver large amounts whenever/wherever needed 31%	Provides good quality of products 23%
Frozen fish (frozen fillet…) (N=73)	66%	34%	Provides competitive prices/Competes with imported fish prices 63%	Can provide & deliver large amounts whenever/wherever needed 29%	Provides good quality of products 25%
Frozen shrimps (N=70)	67%	33%	Provides competitive prices/Competes with imported fish prices 56%	Can provide & deliver large amounts whenever/wherever needed 34%	Provides good quality of products 17%

Other frozen crustaceans (crab, lobster) (N=21)	48%	52%	Provides competitive prices/Competes with imported fish prices 62%	Can provide & deliver large amounts whenever/wherever needed 38%	Provides good quality of products 33%
FrozenMolluskcephalopods (octopus, calamari…) (N=27)	56%	44%	Provides competitive prices/Competes with imported fish prices 59%	Can provide & deliver large amounts whenever/wherever needed 30%	Provides good quality of products 26%
Frozen Shell fish (mussels scallops) (N=3)	100%		provides imported fish /from Finland England Alaska japan/ocean fish 33%	reputable supplier 33%	provides fresh water fish 33%
Canned fish (tuna) (N=18)	78%	22%	Provides good quality of products 61%	Provides competitive prices/Competes with imported fish prices 56%	reputable supplier 17%
Processed seafood (crab sticks, fish fingers, fish escalope …) (N=21)	71%	29%	Provides good quality of products 57%	Provides competitive prices/Competes with imported fish prices 33%	reputable supplier 24%

Table 14

Abdeh	Karantina
Achrafieh	Kesrouani Fishery
Aley	Maria Sea Food
Baabda	Marina
Batroun	Meat & Fish
Beirut	Naccouzi Fishery
Big Chef	Nakoura
Bou Khalil	Nizar - Beirut
Bouar	Ouzaii
Bsos Fishery	Rbeiz
D&C	Robert
Estehlakiyat Al Janoub	Roukozel Hajj
Fishery Cherfan	Royal Gourmet

Halawani Group	Saida/Port of Saida/Fishery in Saida/ChibakSaida
Harkous Fishery	Sarafand/Port of Sarafand/Hicham Salim - Sarafand
Jabra & Maatouk	Sayfe
Jaber	Sea Blue
Jbeil	Sea Fresh
Jounieh	Tyre/Port of Tyre/Fishery in Tyre/El Samra Fishery - Tyre/Beach of Tyre
Kabten Fishery	Spinneys
	Tripoli