Rapid Market Opportunity and Value Chain Analysis for
Fisheries Sector in Tyre-Lebanon

drosos (...)

IUCN ADR
"Marine protected areas" (MPAs) may be important for protecting the marine environment, but they also have substantial socio-cultural impacts about which very little is currently known, or acknowledged in Tyre. It’s the case of most of the MPA in Mediterranean; few data are available on the socioeconomic consequences of MPAs. The present study part of the Sustainable fisheries management for improved livelihoods of the coastal fishing community in Tyre (South Lebanon) analyzed data of the current socio-economic situation of the Tyrian fishermen community, and the possible small and micro-scale businesses that could be developed in Tyre to relieve the pressure on the overexploited fish stocks, while providing viable alternative income to the fishermen community.

Although the conservation of nature should be considered the fundamental objective of MPAs, neglecting their social, cultural and economic impacts has at times led to poor local consensus, if not hostility.

We believe that planning and managing MPAs should be conducted on a multidisciplinary basis. Nonetheless, the very variable characteristics of coastal areas in the Mediterranean require different weightings to be assigned for each factor in order to achieve a durable equilibrium and realize the original objectives of MPAs. Tyre is not different than any other Mediterranean coastal town, the fishing sector in Tyre – the biggest stakeholder and influencer on the MPA - suffers from resource depletion due to overfishing and the use of illegal, unregulated fishing methods such as small fishing nets, use of surface supplied diving for spearfishing and blast fishing. Lack of law enforcement and alternative schemes to generate income for fishermen have resulted in major impediments to sustainability in the fishing sector in South of Lebanon.

Fishing households are aware that to preserve and replenish fish stocks, drastic measures should be implemented. What is more, the sector suffers from deep financial constraints that impede expansion and sustainability. Due to dwindling resources, fishermen live below the financial threshold that allows them to invest in assets and/or to grow businesses that could diversify their income generation methods. There is also the close economic relationship between fishermen and wholesalers, whereby grants to fishermen are provided for discounts of around 20 percent on caught fish, which significantly affects the bargaining power of fishermen. The current income generated by an individual household wholly dependent on fishing is not sufficient to take a loan or invest in growing an enterprise.

At present, the majority of fishermen take out loans to increase their fishing output by purchasing and replenishing their gear that allows them to catch a wider range and amount of fish. Within the context of the sustainability of artisanal fisheries in Tyre, Lebanon efforts are being made to understand how traditional fishermen can improve economic conditions for themselves and their communities through diversification from traditional fishing activities.
Fishermen and Expenditures

- Depend on loans to cover expenditures and others
- Loans to cover schooling, health care, and daily expenses
- 30s to 60s cost of expenditure per fishing excursion
- On a good day, fishermen bring home $100

Households Earning vs Spending

- 61% earn $500 USD
- 73% spend over $700 USD
- Household Debt: 3008 USD
- However, 45% of households claim they do not have any debt

Fishermen and Expenditures

- From fish mongers
- MFI

Number of Household Members

- 5% 0-2 Members
- 37% 5-7 Members
- 55% 3-6 Members

Monthly Income of Fishing Community Households

Forms of Non-fishing Work Practiced by Fishing Community Members

- Collective Organizations
- Fishermen's Syndicate
- Retailers

Fishermen's fixed asset in Tyre Caza

- No direct selling due to the dependency on fishmongers and lack of a formal fish market
- Risk in decrease of the fishing stocks due to the increased value added

Benefits of the Tyre Port Fish Auction Market to Fishermen

- Increase their income from fishing
- Reduce import due to fishmongers

Fishmongers

- Make 100% mark-up
- Fishmongers are affected by fish stocks
- Fishermen need loans to cover expenditures
FISHERY SECTOR

Fishing Methods Employed

- Large Nets: 26%
- Small Nets: 17%
- Use Dynamite: 2%
- Other Fishing Techniques: 40%
- Compressor: 10%

Willingness to Engage in Non-Fishing Sector

- Hospitality
- Retail
- Vocational
- Artisanal
- Beauty
- Clerical
- Transport
- Construction
- Public Sector
- Tourism
- Services

Main Concerns Related to Opening a Business

- Financial Risk
- Other
- Lack of Requirements
- Lack of Experience
- Unable to Make a Living

Willingness to Expand Fishing Related Business

- Have not considered: 73%
- Eager: 14.83%
- Have not considered: 7.32%
- Other: 2.44%

Fishermen reaction to Business Loan

- Not willing: 80.58%
- Open to the idea: 17.05%
- Willing with conditions: 2.37%

Women are more open to business ideas such as artisanal crafts, boutique shops, and other service-related industries.
Geography of Opportunities by Gender

- **Outside South Lebanon**
  - % Female: 50%
  - % Men: 50%

- **Outside Tyre**
  - % Female: 60%
  - % Men: 40%

- **Public Beach/Sea Front**
  - % Female: 30%
  - % Men: 70%

- **Port Tyre**
  - % Female: 10%
  - % Men: 90%

- **Suburbs of Tyre**
  - % Female: 80%
  - % Men: 20%

- **Market of Tyre**
  - % Female: 70%
  - % Men: 30%

- **City of Tyre**
  - % Female: 90%
  - % Men: 10%

---

**Fishing-related Opportunities**

- **Fishing-related sub-sector done by WOMEN**
  - Doing artisanal craftwork of items related to the fishing sector: shell necklaces, dried & framed fish...

- **35 to 50 years see more opportunities in retail, hospitality & vocational sectors**
- **18 to 35 years see more opportunity in retail business**

---

**Women’s entrepreneurial disposition**
- Prefer home-based work
- Not permitting to leave the house for work
- Not aware of the option of traveling outside Tyre for work
- Perceive their role as housewife and child carer
- Women’s entrepreneurial disposition

---

**Fishing-related Opportunities**

- **Opportunities as seen by age groups**
  - Fishermen are interested in expanding products to new markets.
  - Key informant sees that there should be a reduction in the number of workers with not all fixed prices by the fish market.

---

**KEY INFORMANT MARKET OPPORTUNITY ANALYSIS**
Realistic opportunities exist in the City of Tyre, and specially the port area / Old city

In term of fishing opportunities, three main area stand out

**Market Opportunity Scoring (Geography)**

**Fishing Sector**

**Required Skills to Develop an enterprise by Gender**

**Charter Fishing**