

**Association for the Protection of Jabal Moussa
APJM**



**SIFOHR Project
Supporting Small Initiatives of Traditional Food Production
and Handicraft in Rural Areas of Jabal Moussa Biosphere
Reserve**

**Marketing Study
"Jabal Moussa Rural Produce"**

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Acronyms

APF	Agro-processed Food
APJM	Association for the Protection of Jabal Moussa
JMBR	Jabal Moussa Biosphere Reserve
MEPI	Middle East Partnership Initiative
SIFOHR	Supporting Small Initiatives of Traditional Food Production and Handicraft in Rural Areas of Jabal Moussa Biosphere Reserve
USJ	St. Joseph University



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1. Introduction and background

As part of APJM's efforts to develop Jabal Moussa Biosphere Reserve (JMBR) region, a socio-economic survey was conducted by the Sociology & Anthropology Department of St. Joseph University (USJ) in 2008-2009 on 508 households to identify opportunities for developing the existing socio-economic potential of the region. This survey has resulted in a comprehensive socio-economic profile for seven main villages surrounding JMBR: Chouane, Ebreh, Ghbaleh, Jouret el Thermos, Nahr el Dahab, Qahmez, and Yahchouch. Two major skills for women living permanently in the seven villages mentioned above were identified by the USJ survey:

- Production of traditional Agro-processed Food (APF);
- Production of handicrafts.

Since these two skills are directly related to one of the priority areas of the MEPI (Middle East Partnership Initiative) fund: Women Empowerment for Growth, APJM elaborated a project to support and develop this production in JMBR villages. The SIFOHR project (Supporting Small Initiatives of Traditional Food Production and Handicraft in Rural Areas of Jabal Moussa Biosphere Reserve) aims at developing the existing potential and willingness of women to participate in the local economic activity by developing the quantity and quality of traditional agro-food products and handicrafts, and by providing an adapted marketing and sales system and infrastructure that leverages the ecotourism initiative in the reserve.

The intended impact of SIFOHR is to improve income-generation for households of the region through marketing special products that revive the specific identity of the region, and preserve its cultural heritage. This is believed to add value to the ecotourism experience promoted in JMBR, and consequently attract more visitors. On the long-term, the successful application of ecotourism and sales of traditional items is planned to become a self-sustainable system.



The JMBR villages present a low socio-economic profile with a high proportion of inactive people and a significant number of middle-aged women. The socio-economic survey conducted by the USJ has revealed a relatively high proportion of women (48%) living in the area. A big fraction of these women are aged between 40 and 49. On the other hand, the socio-economic data showed that:

- 66% of women don't have an education above secondary school;
- 65% of households have a monthly income below 1,330 USD, with some even more deprived villages such as Ebreh having 60% of households with less than 350 USD per month;
- 24% of inhabitants don't have any economic activity.

According to the general study done by the USJ:

- 11 households declared selling APF products;
- 128 households expressed their readiness to produce and sell products (APF and handicrafts) for JMBR visitors in the future.

The objectives of this marketing study are:

- Better understand the current situation of APF and handicrafts production in JMBR villages;
- Assess the existing potential for JMBR products through the elaboration of products' profiles;
- Get market information about APF and handicrafts products: sold products, existing market channels, prices, packages, etc.;
- Assess the marketing potential for JMBR products on the Lebanese market and elaborate a marketing plan for the future.

The methodology used for the realization of this study is based mainly on field work and interviews with two different target groups: women who produce or wish to produce traditional APF and local handicrafts, and with JMBR visitors who constitute the main potential buyers of such products.



From another side, a background study on the general market of traditional APF products and handicrafts in Lebanon is done to assess the potentials of JMBR products in this niche market.



2. Lebanese mountains and rural products

The Lebanese mountains are usually characterized by traditional villages, distinguished by specific characters, charm and uniqueness. They show traces of very old human occupation and offer a great interest of local heritage with its natural and cultural resources: a distinctive biodiversity, diverse landscapes, local architecture, historical monuments, socio-cultural traditions, handicrafts production, and culinary heritage.

The natural and cultural diversity of the Lebanese mountains and rural areas is strongly expressed in a wide variety of mountain products and services. While some of these products are found all over the country and are an integral part of the Lebanese heritage, some other products are very specific to some areas and villages. Some products can be found in more than one area but the use or the preparation can be different. Other products are common to Mediterranean countries such as: olive oil and wine. In both cases, APF products have acquired the taste and the characteristics of the Lebanese culture and traditions.

Lebanese rural products: agro-processed food & handicrafts

The Lebanese cuisine use a lot of traditional products ("traditional" not "terroir", because the notion of terroir does not fully apply to all of these products). Examples of these products include *Burghul* (parboiled cracked wheat), which has become an international product, some dairy products such as *Kishk* (Burgul and Yoghurt), *Darfiyeh* Cheese and *Labneh* (strained Yoghurt), some bread such as *Markouq* and *Tannour*, Molasses, Flower distillates, and fat-preserved meat "*Kawarma*". One must note, however, that all these products are common to the Levant, especially to the regions of Syria, Lebanon, and Palestine. An important part of these products is produced during the summer season by families (mainly women) who live permanently in rural and mountain areas to be preserved and consumed



during the winter season. The products resulting from this process are known under the name of “*Mouneh*” products (**Annex.1**).

In addition to the APF, women living in rural and remote mountain villages in Lebanon are known for their handicrafts produce. This production is made of original materials shaped with an aesthetic sense born of historical, social and environmental influences. Rural women transform daily objects into works of art.

Even if these handicrafts were born from a need to be used in rural homes, their style and beauty attract the tourists visiting the country making the handcrafted items of Lebanon a significant memorabilia of the tour. The methods used are often age old and handed down from the previous generation to the next generation. The intricate details of the crafts of Lebanon make them unique in their own way. Different parts of the country, mainly rural and mountain areas specialize in various handicrafts. The crafts produced in the Lebanese mountains include:

- Decorated soaps;
- Pottery for decoration or for kitchen use;
- Cutlery;
- Textiles;
- Woodcarving;
- Painting on glass, wood, pottery, textile;
- Embroidery;
- Needlework, etc.

3. Jabal Moussa villages and rural products

Target group profile

In order to have a socio-economic profile for the women producing APF and handicrafts in JMBR villages, 30 women from four villages were interviewed. The selection of the villages and women was based on the following characteristics:

- The most populated villages on a permanent base;
- The villages where a majority of women declared in the USJ study that they produce and sell, or wish to sell *mouneh* and handicrafts products.

Home visits and interviews were conducted using a questionnaire form containing questions about the socio-economic profile of women and their production practices (**Annex.2**).

The **Table.1** shows the distribution of interviewed women per village:

Table.1. Distribution of interviewed women per village

Village	Number of interviewed women	%
Yahchouch	10	33.3%
Ghbaleh	10	33.3%
Jouret el Thermos	5	16.7%
Nahr el Dehab	5	16.7%
Total	30	100%

The results of the survey have revealed that the average age of the target group is 48 years old. This figure is relatively equivalent to the result of the USJ study. It is important to note that 77% of the women are aged between 40 and 60. The majority of these women (85%) are married and do not exercise any professional work outside their household. They are responsible of the household daily work.



Table.2. Age distribution of the target group

Age	Number of interviewed women	%
20-30	2	7%
30-40	2	7%
40-50	14	47%
50-60	9	30%
>60	3	10%

Concerning the number of members per household, the results showed that 64% of the households are formed of 4 members and more.

Table.3. Number of household members

Number of Members	Number of households	%
1	2	7%
2	3	10%
3	6	20%
4	9	30%
5	8	27%
6	2	7%

The income resources per household are distributed as follow:

Table.4. Household income resources

Income resource	Number of households	%
Employment	11	37%
Private work	12	40%
Agriculture	7	23%
Total	30	100%

Despite the rural characteristics of the area and its natural resources and fertile soil, agriculture is losing importance in these villages. Only 23% of the assessed households live from agricultural activities, which is an alarming figure in a rural area.



It is important to note that the main working persons in the households are men; they are usually employed in urban areas (mainly Jounieh and Jbeil). Many households have additional income from other family members who don't live in the house and in the village, such as married children or children living abroad.

If we consider the number of women who sell some of their *mouneh* products, we find that these persons are almost equally distributed between the 4 assessed villages (**Table.5**). Among the women who only produce *mouneh* for household consumption, 9 of 15 (60%) showed an interest in selling a part of their production in the future in cooperation with APJM. They mentioned that they are able to produce additional quantities if a market is ensured.

Table.5. Distribution of women per villages according to mouneh sales

Village	Interviewed women	Sell	Don't sell	Wish to sell	No interest in selling
Yahchouch	10	4	6	5	1
Ghbaleh	10	4	6	2	4
J. el Thermos	5	4	1	1	0
N. el Dehab	5	3	2	1	1
Total	30	15	15	9	6

Agro-processed products description

The *mouneh* produced in the four assessed villages is rich and diversified. However, not all the products have the same importance regarding quantities and values. The tables hereunder show the complete list of products identified during the field study and classify them according to their importance. The figures are relative to a one year production for 15 producers.

Table.6. Classification of products by sold quantities

Product	Unit	Quantity
Kishk	Kg	444
Grape Juice " <i>Hosrom</i> "	Bottle	192
Zaatar	Kg	152
Grape leaves	Kg	150
Tomato sauce " <i>Rebb</i> "	Kg	133
Mulberry syrup	Bottle	103
Apple Vinegar	Bottle	90
Apricot jam	Kg	60
Sumac	Kg	48
Fig jam	Kg	38
Pickles	Kg	35
Apple jam	Kg	25
Grape Vinegar	Bottle	N/A
Tomato juice	Bottle	N/A
Quince Jam	Kg	N/A
Loubyeh	Kg	N/A
Rose Syrup	Bottle	N/A
Arak	Bottle	N/A
Apple Liquor	Bottle	N/A

Table.7. Classification of products by value of sales per year

Product	Sales in LBP/year
Kishk	12,600,000
Zaatar	3,000,000
Tomato sauce " <i>Rebb</i> "	2,200,000
Grape Juice " <i>Hosrom</i> "	1,900,000
Grape leaves	900,000
Mulberry syrup	600,000
Apricot jam	480,000
Apple Vinegar	400,000
Fig jam	400,000
Sumac	260,000
Apple jam	225,000
Pickles	175,000
Grape Vinegar	N/A
Tomato juice	N/A
Quince Jam	N/A
Loubyeh	N/A
Rose Syrup	N/A
Arak	N/A
Apple Liquor	N/A
Total	23,200,000

The 19 products identified can be classified in 8 categories:

1. Jams: fig, apple, apricot, quince;
2. Syrups: mulberry, rose;
3. Sauce: *rebb*, tomato juice;



4. Herbs & spices: zaatar, sumac;
5. Vinegar: apple, grape;
6. Pickles: cucumber, wild cucumber, mixed;
7. Distilled: wine, arak, apple liquor;
8. Specialties: *hosrom*, kishk, grape leaves, loubyeh.

In comparing **Tables 6 & 7**, we can deduce that Kishk, Zaatar, Hosrom, and Rebb, are the most important products in terms in sold quantities and selling value.

Production practices

In general, all the women produce *mouneh* in their homes, using traditional and simple equipment (equivalent to the household kitchen equipment). However the main products, *Kishk* and *Hosrom*, need special equipment to be processed: a *Kishk* miller and a Grape Squeezer for *Hosrom*. These 2 machines are not found in JMBR villages (except one Grape Squeezer in Chouane, where some producers take their grapes and pay a fee to process them). Therefore, the women are obliged to transport their products outside their villages, and consequently increase their production cost and put additional efforts. Recently, 3 women who produce important quantities of *Kishk* bought small millers for their personal use (2 in Yahchouch and 1 in Nahr el Dehab).

The production methods and recipes are traditional and based on what the women learned historically from their ancestors. No one follows a written recipe. Thus, the production is not homogenized between all the producers and differs from a season to another.

The sold *mouneh* is packaged in rudimentary and heterogeneous containers in their form, size and capacity; for example the *Hosrom* is found in many forms of bottles (most of them are used bottles of commercial juice) and with many



volumes 1 Liters, 1.5 Liters and 2 Liters. The 3 main packaging containers used are:

- Jars of 1 to 2 Kg for: jams, pickles, sauce, grape leaves, *loubyeh*;
- Bottles of 1 Liters to 2 Liters for: syrups, *hosrom*, distilled;
- Plastic bags of 1 Kg for: zaatar, *sumac*, *kishk*.

Handicrafts production in Jabal Moussa

Among the 30 women interviewed, 7 women (23.3%) produce and sell handicrafts. This rural production has the similar characteristics of the mountains handicrafts production all over Lebanon (*cf. page 3*). The women of JMBR produce a wide variety of handicrafts. The methods used for the production of these products are mainly age old and handed down from the previous generation to the next generation. However, during the field study we encountered 2 women who have introduced some innovative handicrafts items based on the recycling concept. The most important handicrafts produced in JMBR villages are:

- Decorated soaps;
- Painting on glass, wood, pottery, textile;
- Embroidery;
- Needlework.

Actual market of JMBR rural products

The actual market channel for all the producer is limited to personal contact and to the network of friends and families who visit JMBR villages during summer and on weekends. Each producer has his loyal clients who ask him every year for a certain quantity of one or many *mouneh* and handicrafts products. Accordingly, the production of *mouneh* and handicrafts for commercial purpose is done based on preliminary demand and with fixed quantities.



4. The Lebanese market for rural products

During the last days of summer with the first frosts of autumn, the villagers of the Lebanese mountains prepare their *mouneh* provisions for the long winter. With the expansion of urbanization in Lebanon in the last four decades, and following the rural exodus of many villagers from mountains to coastal cities, the Lebanese agricultural and food market witnessed the development of a new market segment related to *mouneh* products.

Nowadays, urban areas inhabitants -originally from the city or those who have emigrated to it- include the *mouneh* products in their food shopping basket. Moreover, this type of food products is gaining more importance on the market for social, health, and environmental issues. These consumption considerations are still not widespread and well developed in Lebanon despite the existence of a very small niche market for healthy and organic products as well as for fair trade products.

Mouneh marketing channels in Lebanon

Most of the *mouneh* products in Lebanon are sold through direct sale in different villages known for their specialties. The majority of the villagers sell a part of their home made production to their relatives and friends visiting them in the summer, while in some villages producers set seasonal points of sale on the road side (under the form of a Kiosk) or expose their production in local shops and restaurants. Villagers also promote and sell their *mouneh* products in summer festivals. A smaller quantity of *mouneh* products can be found in the urban areas in some groceries who have linkages with friends and relatives in the mountains.

In addition to these conventional marketing channels, in the last ten years new marketing channels for the *mouneh* products emerged on the Lebanese market. Specialty food shops are opening in Beirut and its Greater Suburbs.

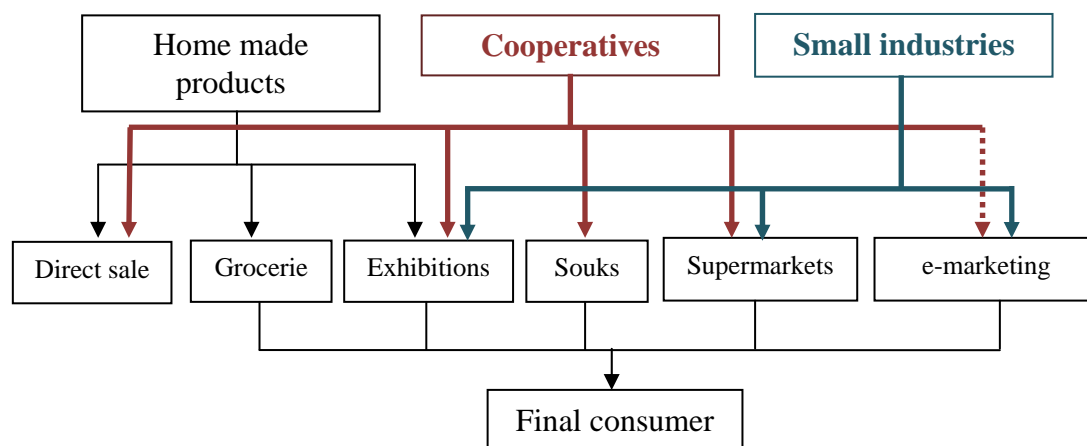
As the consumers in Lebanon are more and more sensible to health and environmental issues, the number of these shops is in a continuous rise. They sell local and imported processed food, and some of these shops sell exclusively organic fruits and vegetables and processed products (**Annex.3**). *Mouneh* products are also being promoted and sold in regional and seasonal exhibitions: Christmas fairs, Garden Show, Cities' events; and in weekly markets, or souks, such as Souk el Tayyeb. We can also mention the e-marketing and online sales platforms even if they are still underdeveloped in Lebanon. These new emerging marketing channels sell the production of:

- Small agro-food processors: Adonis Valley, Mymoune, etc.;
- Women cooperatives and development projects executed by NGOs: Atayeb el Rif (YMCA), Wataneh (arcenciel), Intajouna (Caritas), Namlieh (CRTDA), Arz el Shouf (Shouf Cedars Reserve), etc. (**Annex.4**).

Recently, some of these brands are being introduced to some supermarkets and are placed on special stands and special sections for specialty and traditional local food, organic food, and healthy food.

The following figure represents the *mouneh* products marketing and sales channels on the Lebanese local market (**Figure.1**).

Figure.1. Mouneh products market channels on the Lebanese local market.



While examining the characteristics of the *mouneh* products on different market channels, we can observe major differences between the conventional marketing channels and the emerging ones (**Table.8**).

Table.8. Comparison between conventional and emerging marketing channels for mouneh

Characteristic	Conventional channels	Emerging channels
Pricing	The price is set randomly by each producer and differs between the producers, the regions and the seasons	The price follows the rules of the market with a slightly higher cost than other industrial products on the market
Packaging and branding	Rudimentary package and almost absence of brand name (if existing they are not officially registered)	The package is well developed and attractive with registered brand name
Quality control and regulations	Almost inexistent; even if the producer follow good practices, but they don't have any quality control system and certification	Quality control is related to the national quality control system and to LIBNOR standards as well as to the retail shop standards in case they exist, especially for organic products
Availability and consistency	Low and random, can differ from a season to another	Medium to high, depends on the size and professionalism of the processor (cooperative or small industry)

It is important to note also that many categories of *mouneh* products (such as jams, olive oil, pickles, etc.) are also being produced in a semi or fully industrial methods, and in most cases the raw material used for their production is imported, which make them lose their traditional and local *mouneh* characteristics and image.



Handicrafts producers and market

As mentioned in the second paragraph of this study (*cf.* Page.3) traditional handicrafts are produced by women in their villages with an inherited know-how from their ancestors. The main marketing channel for these authentic handicrafts is direct sale for friends and relatives. In addition to direct sale, we can find in different major cities of Lebanon (Grand Beirut, Saida, Tripoli, Zahle, Tyre, Jounieh) a big number of handicrafts and souvenir shops who pretend to sell traditional local handicrafts, especially for tourists. Thus, it is important to note that the majority of these shops sell fake handicrafts produced in an industrial way, and there are very rare souvenir shops who buy their products directly from women living in rural areas.

As in the case of *mouneh*, many NGOs and cooperatives launched in the last decade development projects aiming at promoting and developing the production and sales of authentic handicrafts produced by women in need in remote and rural areas. Some of these projects established partnerships with few souvenir shops such as Artisans du Liban. Other individual producers expose their production in local and national exhibitions (for example the Garden Show) and in Souk el Tayyeb.

Tourism industry and local products promotion

Since the end of the Lebanese war in 1990, local and international tourism in general, and the emergence of the nature and alternative tourism movements in mid nineties, contributed to the development of the *mouneh* and handicrafts markets. The *mouneh* and handicrafts products are more and more accessible to rural and natural area visitors and tourists, especially when it comes to nature reserves and organized tours by nature based tour operators. In this context a prominent travel agency "Saad Tours" created with a tour operator a special tour packaged "*Mawasseem*" (Seasons) aiming at promoting local culinary and handicrafts in different Lebanese villages.



5. Field survey

The second part of the field study targeted JMBR visitors. These persons visit the reserve for many purposes: hiking, nature sports, wild life discovery, education and nature interpretation, relaxation, encounter with local communities, etc. Regardless the aim of their visit, these persons constitute the first potential buyers of JMBR rural products, especially on the short term and in the first 3 to 5 years of the development of such project. A questionnaire was prepared to assess the general profile JMBR and their willingness and preferences to buy local APF products and handicrafts (**Annex.5**). A total number of 100 questionnaires were filled on different dates and with different persons from different groups between June 2011 and December 2011. The results of this field survey are presented and interpreted in this part of the study.

Visitors' nationality

Figure.2 shows that the big majority of JMBR is formed of Lebanese citizens living in Lebanon, and only 10% are Europeans and Americans. This predominance of Lebanese visitors shows the importance of local nature tourism. Even if Lebanese visitors are interested in buying local products, but it will be important to diversify the nationality of JMBR visitors and consequently the potential buyers of the products.

Visitors' profession

The 71% of JMBR are employees and persons with private profession. This category of persons have medium to high incomes in the Lebanese society and can afford buying local *mouneh* and handicrafts if they are interested (**Figure.3**).

Figure.2. Jabal Moussa visitors' nationality

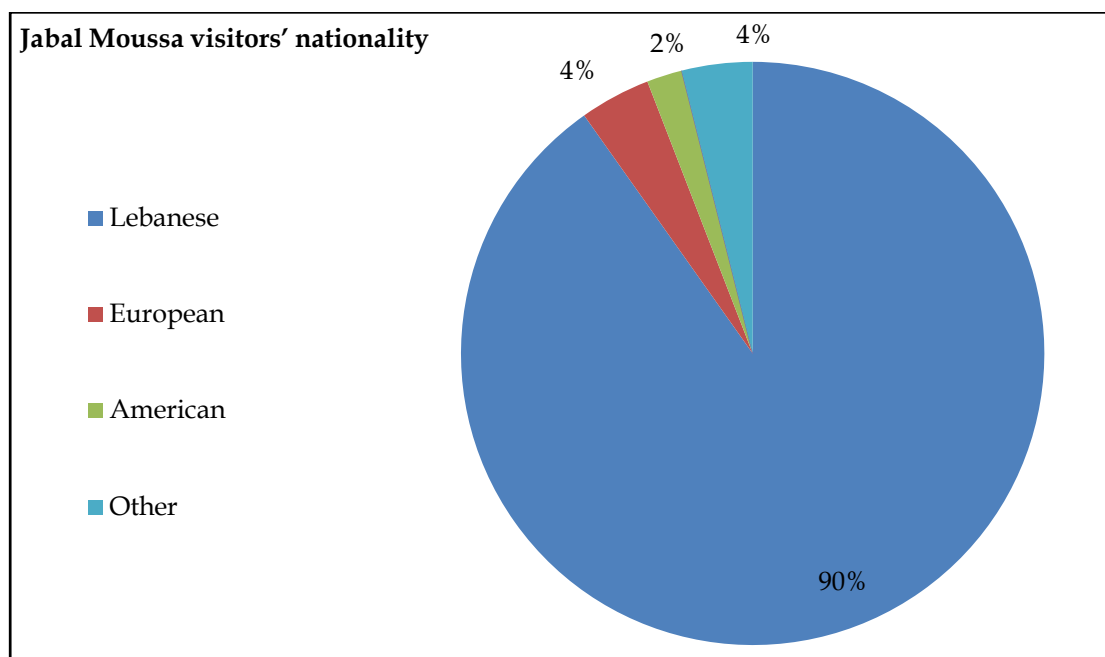
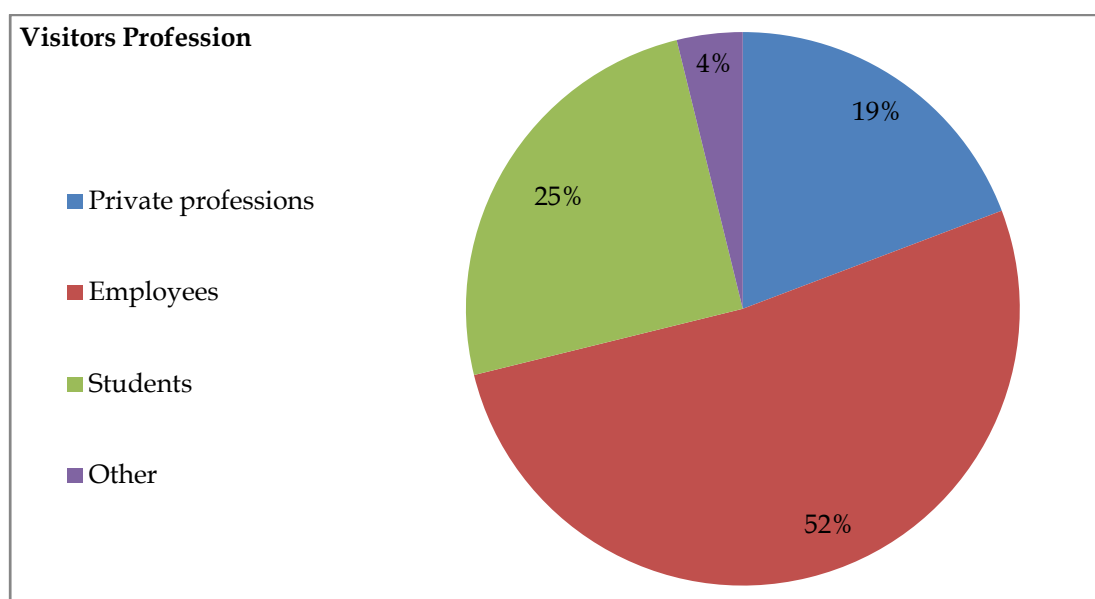


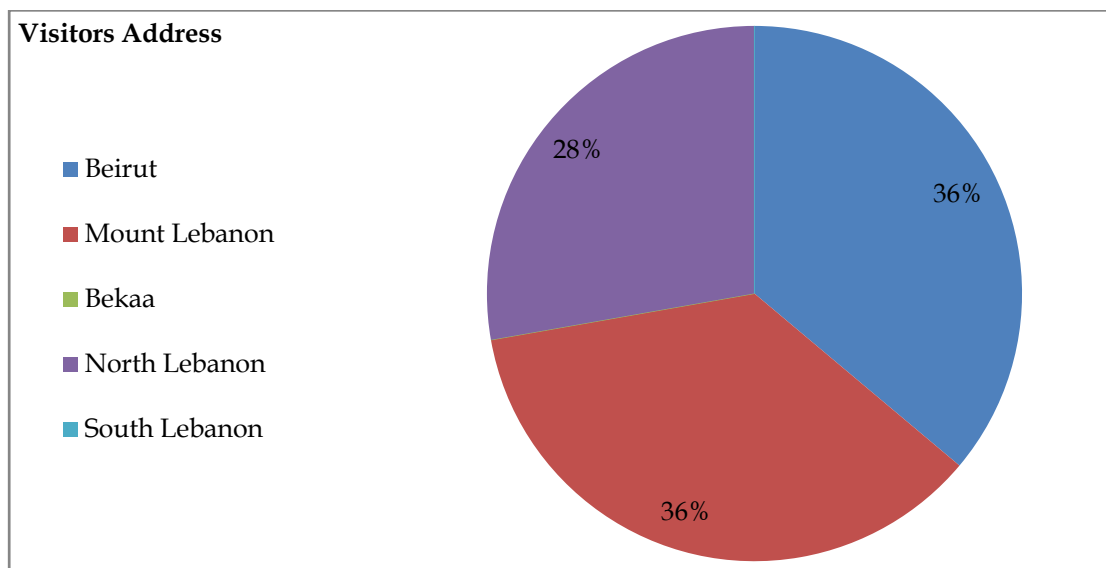
Figure.3. Jabal Moussa visitors' profession



Visitors' address

The majority of JMBR visitors (72%) live in urban areas of Beirut and Mount Lebanon (**Figure.4**). These persons are usually interested in buying *mouneh* products when they visit rural and mountain areas, especially if they don't have family relatives or friends living in villages.

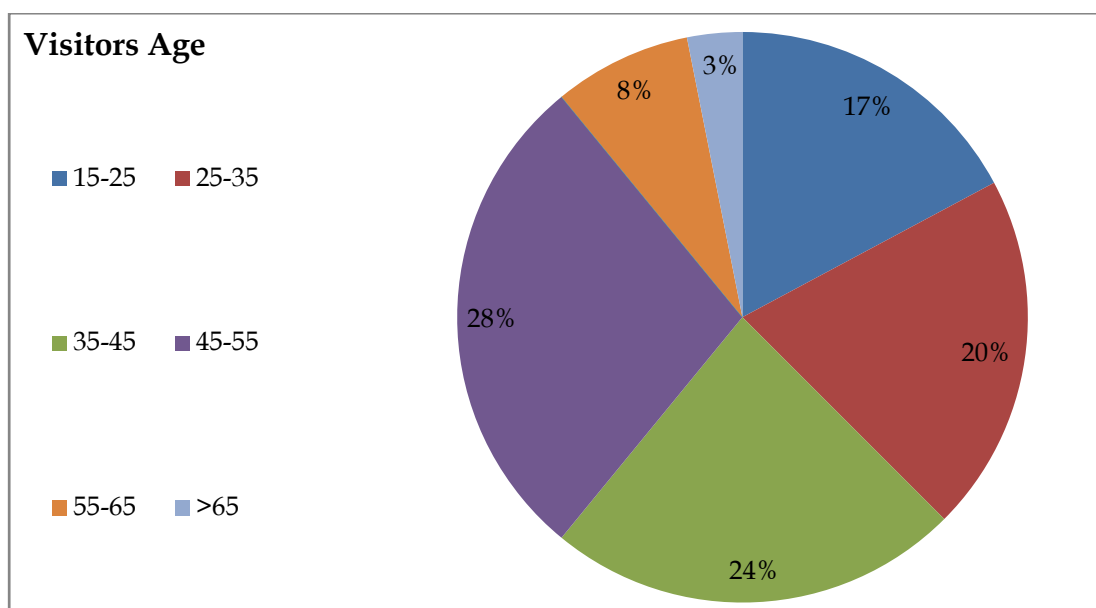
Figure.4. Jabal Moussa visitors' address



Visitors' age

61% of JMBR visitors are young people aged between 15 and 45 years old. People in this age interval should be more interested in buying local *mouneh* and handicrafts products (Figure.5).

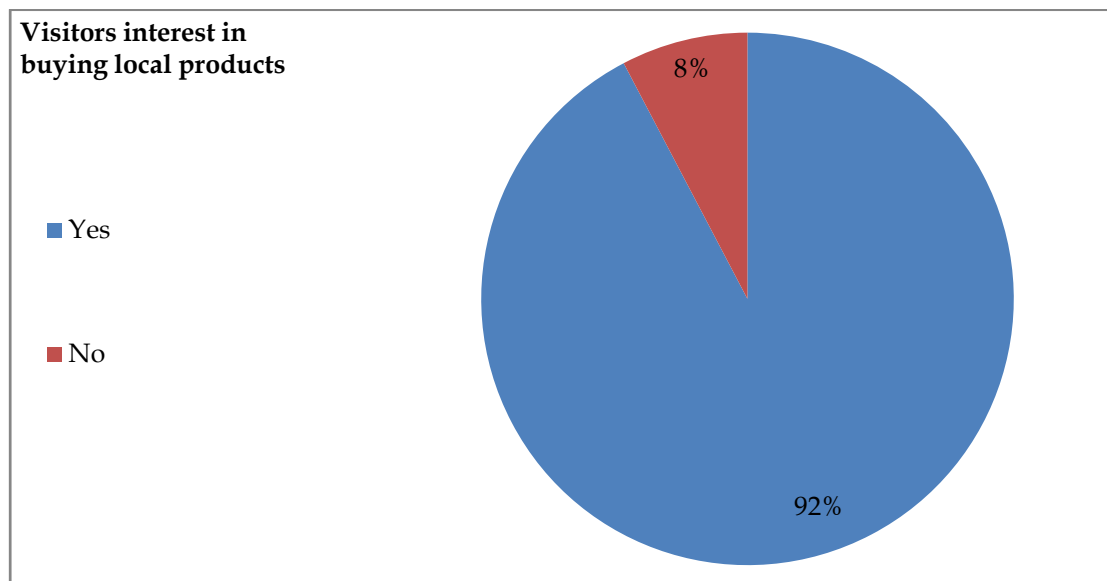
Figure.5. Jabal Moussa visitors' age



Visitors' interest in buying local products

When we asked the 100 visitors if they are interested in buying local products produced in JMBR villages, 92 persons answered positively and only 8 were not interested (**Figure.6**). 98% of the persons who answered yes showed an interest in buying *mouneh* products and a slightly lower number (83%) were interested in handicrafts.

Figure.6. Jabal Moussa visitors' interest in buying local products



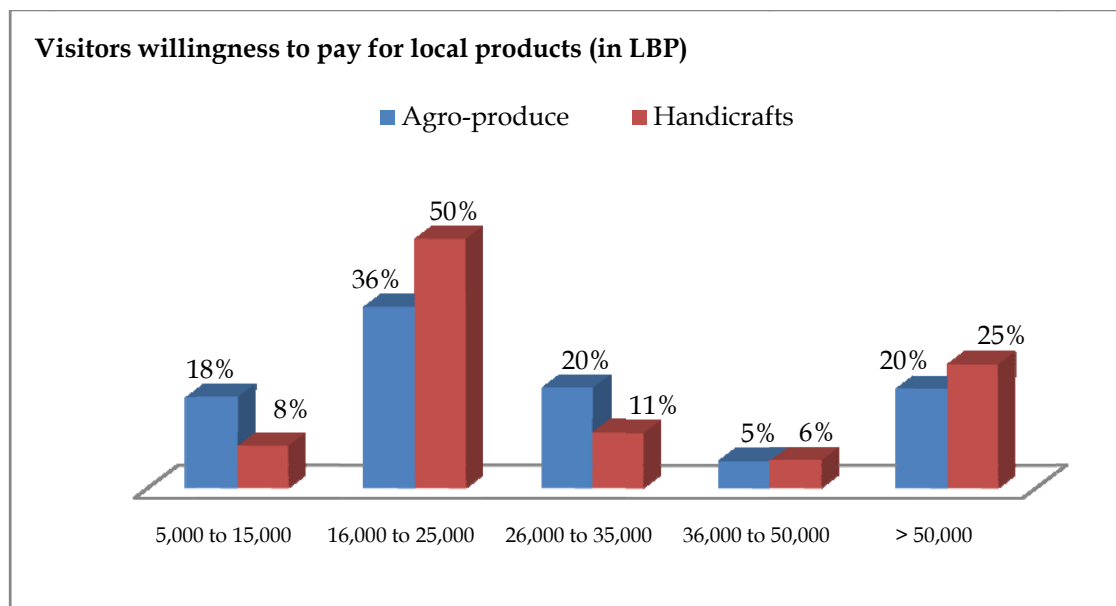
Visitors' willingness to pay for local products

Concerning the amount of money to be spent on the purchase of local products, we can notice in the **Figure.7** that:

- For the *mouneh* purchase, 36% of the potential buyers are willing to pay between 16,000 and 25,000 LBP, 20% are willing to pay between 26,000 and 35,000 LBP, while another 20% of the potential buyers are willing to pay more than 50,000 LBP for their total purchase of *mouneh* products;
- For the handicrafts purchase, 50% of the potential buyers are willing to pay between 16,000 and 25,000 LBP, and 25% are willing to pay more than 50,000 LBP for their total purchase of handicrafts products.

These numbers can give an idea for the financial projection of *mouneh* and handicrafts sales in the first 3 years of the project.

Figure.7. Jabal Moussa visitors' willingness to pay for local products



Visitors' preferences for mouneh products

When asked to rank the mouneh products in a preferential way, the results (**Table.9**) showed that the top 3 products are Honey, Specialty food (Kishk, Summak, and Hosrom), and herbs (Zaatar). Pickles were the less preferred products.

Table.9. Visitors' preferences for mouneh products

Product	Rank	Percentage of potential buyers
Honey	1	66.7%
Specialty food such as Kishk, Summak, Hosrom	2	48.3%
Herbs	3	45.0%
Jams	4	43.4%
Syrups	5	36.7%
Pickles	6	21.7%

Visitors' preferences for handicrafts products

As for the handicrafts, the results (**Table.10**) showed that the top 3 products are Traditional hiking sticks, Wood decoration items, and Decorated Soap.

Table.10. Visitors' preferences for handicrafts products

Product	Rank	Percentage of potential buyers
Traditional hiking stick	1	33.4%
Wood decoration items	2	31.7%
Decorated soap	3	26.7%
Home decoration items	4	18.4%
Tailor made handicrafts	4	18.4%

Visitors' preferences for the point of sale

The last question was about the most preferred point of sale where the visitors would like to find and buy JMBR products, other than in the entrance of the reserve. The answers showed that the supermarket is by far the most preferred place, followed by specialty food shops and local grocery shops (**Table.11**). These results demonstrate the importance supermarkets are taking in the shopping practices of the Lebanese consumers. They are also related to the actual consumers' behavior who prefer to do their shopping (including food and beverage items) from one place, which is the supermarket.

Table.11. Visitors' preferences for the point of sale

Point of sale	Rank	Percentage of potential buyers
Supermarket	1	45% %
Specialty food shop	2	28.4%
Local grocery shop	3	21.7%
Exhibition	4	18.4%
Home delivery	4	18.4%



6. Marketing strategy and action plan

According to the results of the field study a marketing strategy for JMBR *mouneh* and handicrafts products is proposed hereunder and is based on the 4 Ps marketing approach as well as on the analysis of the consumers behavior and need. The strategy takes into consideration short term (3 years) and long term (5 to 10 years) period recommendations.

The Product

As showed in the field survey results, the majority of JMBR visitors are interested in buying local *mouneh* and handicrafts products. Thus, the visitors expressed some preferences giving a higher potential for some products. In the case of *mouneh*: honey, kishk, hosrom, and zaatar were in the top ranks; and for the handicrafts the top ranked items were: hiking sticks, wood decoration items, and decorated soap. In their product development APJM should take into consideration these preferences; of course they have to benefit from all existing products in the region and from the local know-how of the women, but a special interest should be given to the most demanded products by the clients in order to ensure enough quantities.

Regarding the quality, the package and the size of the products, APJM should work with the women to improve their quality and make the taste of *mouneh* products more consistent and the look of the handicrafts items more artistic. The package of all products sold under the name of APJM should be homogeneous with a preference to small size products; for example: liquid products in bottles of 33 cl., jams in jars of 400 g., herbs, kishk in bags of 0.5 Kg. On a short term period the package design can be simple without labels, but with a small tag mentioning the name of the products, its ingredients and expiry date. Women working in handicrafts can participate in developing simple decorations for the agro-processed food products packages.



On the medium and long term, a more sophisticated package can be designed with a label containing elaborated information about the product, its health benefits, its uniqueness, and its elaboration process; it can also include a small pamphlet with a short storyline about the producers. As for the quality of the product, the acquisition of an organic certification label will give the product an added value; but such certification will need more quality control measure as well as insuring organically certified raw materials, and it will also increase the production cost. Other labeling options could be the Fair Trade label that is managed by the NGO Fair Trade Lebanon; however this label is developed for export, which will require from APJM producers to meet the very high quality standards of the importing countries and insuring big quantities.

Place

For the short term period, APJM should initially develop their own point of sale on the entrance of the reserve (one or two entrances according to the available resources). The reserve rangers and guides should be informed and trained on basic sales and marketing techniques to be able to promote the local products. In addition to the entrance kiosk, during the first 3 years of the project APJM can participate in exhibitions and local permanent and seasonal markets such as the Garden Show and Souk el Tayyeb. This activity is also a promotion for JMBR products.

On a longer term, APJM can work on introducing their products in the supermarkets and specialty food shops, especially in the closest urban areas to the reserve: Jounieh, Zouk, Sahel Alma, Adma, Jbeil (*cf. Annex.3* for the complete list of specialty food shops). However, these marketing channels have many constraints for a “young product” especially if it is not produced in big quantities with a quality control system. Financial obstacles such as acquiring bar codes and the registration in VAT and the margins of the



supermarkets which can reach 40% as well as the payment procedures that can extend up to 90 days, should also be considered.

Depending on the quantities and types of the handicrafts, APJM can consider selling a part of the women's production to the major Lebanese handicrafts points of sale: Maison de l'Artisan and l'Artisan du Liban. Asking these shops about their needs and producing customized and exclusive handicrafts for them could also be another marketing approach.

Promotion

For the promotion of their products APJM should create their own identity and image. The identity and image should show the uniqueness of the JMBR products, its utility and the importance each of the item in the product lines.

The identity of the JMBR products has to enhance the image of the products as an authentic, natural, healthy, and fairly produce, which will have a positive impact on the consumers that are looking for such products.

On the short term many promotional activities can be done:

- Design and put promotional poster in the kiosk on the reserve entrance;
- Mention the availability of local products in all APJM promotional items;
- Create a special ecotourism packages for JMBR visitors to participate in the production of *mouneh* and handicrafts;
- Participate in local and national exhibitions related to food and beverage in the specialty food section as well as fairs related to handicrafts production;
- Create a yearly event in one or many of JMBR villages designated to the promotion of one or many products, for example: national day for the responsible collection of zaatar in JMBR villages, national day for honey production in JMBR villages.



Price

The pricing of JMBR products (*mouneh* and handicrafts) has to be done according to two considerations:

- A feasibility study determining the average cost of production per category of products (fixed cost and operational cost), the price that will be paid to the women, the retail selling price, and the profits' margins. In result APJM should be able to cover all production, managerial and promotional costs.
- The price of JMBR *mouneh* and handicrafts can't be more expensive than the price of the same category of products existing on the Lebanese market (Annex.6); with exception if they have an added value (recycled handicrafts, organic products).

According to its financial capacities APJM has to choose between: (1) buying the products directly from the producers, or (2) putting these products in its Kiosk on consignment. This decision should be negotiated with the women, and will depend on the quantities of products demanded by APJM.

The **Table.12** summarizes the main strengths, weaknesses, opportunities and threats that could face APJM in the marketing and sales of their local products.

Table.12. SWOT analysis for Jabal Moussa local products marketing

<p>Strength</p> <ul style="list-style-type: none"> • Image of Jabal Moussa as a Biosphere reserve • willingness of APJM to develop JMBR villages and their socio-economic conditions • The presence of women who possess a local know-how and a will to protect their heritage 	<p>Weakness</p> <ul style="list-style-type: none"> • Lack of business orientation for the women who produce local products in JMBR villages • Heterogeneity of the production • Low consistency in the products quality
<p>Opportunities</p> <ul style="list-style-type: none"> • Natural and organic movement and trend in Lebanon • Increase in ecotourism development in JMBR and in Lebanon • Emergence of specialty food shops 	<p>Threats</p> <ul style="list-style-type: none"> • Strong competition in a niche market • Financial risks

7. Conclusions and recommendations

The production of *mouneh* and handicrafts in JMBR villages is done on the level of the household and in a very traditional way, resulting with high diversity of products, uncontrolled quantities, and heterogeneous quality. If APJM wants to promote and sell part of the *mouneh* and handicrafts production of JMBR villages, it is recommended to develop this production in a way to make it more standardized and homogeneous. By this we mean: consistency in the supply quantities, standardization of the recipes, and uniform packaging material in its form and capacity.

As the principal buyers of the *mouneh* and handicrafts will be the JMBR visitors (hikers and nature lovers), it is recommended to promote mainly small items, and if possible utilize recycled or reused packaging material. As showed in the field survey results, the majority of JMBR visitors are interested in buying local *mouneh* and handicrafts products. Thus, the visitors expressed some preferences giving a higher potential for some products. In the case of *mouneh*: honey, kishk, hosrom, and zaatar were in the top ranks; and for the handicrafts the top ranked items were: hiking sticks, wood decoration items, and decorated soap. In their product development APJM should take into consideration these preferences

For the first 3 years the establishment of a Kiosk on JM BR entrances is the most appropriate choice for the promotion and sales of *mouneh* and handicrafts produced in JMBR villages. As the *mouneh* production is mainly done between July and September; it is very important to start the preparations for each season early, between April and June, to ask the producers for the needed products and quantities.

The selling price should be equivalent to the general market selling price of *mouneh*, taking into consideration a small percentage on sales for APJM to cover some costs.

Annexes

Annex.1. Classification of the Lebanese mountains agro-processed products

Category	Product name	Location	Altitude
Olive based products	Olive oil	All over Lebanese mountains	200 to 1000 m
	Preserved olives		
	Soap		
Alcohol and spirits	Arak	Mount Lebanon	500 to 1200 m
	Wine		
	Fruit Liquors		
Honey	Middle mountain honey	All over Lebanese mountains	200 to 800 m
	High mountain honey		800 to 1200 m
Molasses	Grape molasses	Mount Lebanon South Lebanon	400 to 750 m
	Carob molasses		
Syrups	Rose	All over Lebanese mountains	400 to 800 m
	Apple		800 to 1500 m
	Mulberry		500 to 800 m
	Apricot		400 to 600 m
	Strawberry		200 to 800 m
	Other fruits		200 to 1000 m
Jams	Apple	All over Lebanese mountains	800 to 1500 m
	Apricot		400 to 600 m
	Quince		800 to 1500 m
	Fig		200 to 800 m
	Grape		200 to 800 m
	Strawberry		200 to 800 m
Compote	Apricot	All over Lebanese mountains	400 to 600 m
	Cherries		800 to 1200 m
	Peaches		800 to 1200 m
Vinegar	Apple	All over Lebanese mountains	800 to 1500 m
	Grape		200 to 800 m
Herbs	Zaatar Oregano	All over Lebanese mountains	200 to 800 m
	Sumac		
Dairy products	White goat cheese	All over Lebanese mountains	200 to 1200 m
	Darfiyeh		
	Kishk		
	Labneh		
Pickles	Cucumber	All over Lebanese mountains	200 to 1000 m
	Wild cucumber		
	Mixed vegetables		
Preserved vegetables	Eggplant, beans, chickpeas, etc.	All over Lebanese mountains	200 to 1000 m
Aromatic and medicinal plants	Fresh or dried: basil, chives, oregano, sweet marjoram, spearmint, thyme, sage, rosemary, etc.	All over Lebanese mountains	200 to 1000 m
Other specialties	Kawrama	All over Lebanese mountains	200 to 1000 m
	Burghul		
	Specialized bread		



Annex.2. Questionnaire for household survey on socio-economic and production profiles

Questionnaire N.: _____

Date: _____

Ref. USJ study: _____

Personal and socio-economic data

Name: _____

Husband name: _____

Age: 20-30 ; 30-40 ; 40-50 ; 50-60 ; >60

Village: _____

Address: _____

Household members: _____

Economic activity and source of income

Private employment	Public employment	Industry	Agriculture	Services	Other

Local products information

Products								
Season								
Raw material								
Recipe								
Production								
Consumption								
Sales								
Price								
Clients								

Owened equipment and infrastructure	Rented equipment and infrastructure

Production location:

Product development proposal:



Annex.3. Specialty and organic food shops in Beirut and its greater suburbs

Shop name	Address	Product specialization
Al Marj	Abed El Wahab El Inglizi Street, Achrafieh, Tel: 01210211	Local organic food (fresh and processed)
A New Earth	65 Zahret El Ihssan Street, Achrafieh, Tel: 01219920	Local and imported organic food (fresh and processed)
Aziz Delicatessen	Amaret Shalhoub, Zalka, Tel: 01886677 Kantari Street, Minet El Hossn, Tel: 01358000	Local and imported processed food (organic and conventional) Catering services Wine shop
Beit el Soha	Achrafieh, Tel: 01398366	Local healthy and organic food (fresh and processed)
Batrouniat	Beit El Mouneh, Batroun, Tel: 06744510	Local processed food
Bio-Tiful	Al Maarad Street , Tripoli, 03982826	Local and imported organic processed food
Diet Box	Blata Street, Beit Shabeib, Tel: 03535887	Healthy food
Goodies	Verdum Street, Tel: 01796797	Specialty food supermarket (local and imported, fresh and processed, organic and conventional)
Healthy Basket	Hamra street, Hamra, Tel: 01747831	Local organic food (fresh and processed)
Le Carpaccio	Naccache, Tel: 04418396	Specialty food and fruits and vegetables (conventional and organic)
Le Regal	Hazmieh, Tel: 05454230	Specialty food and fruits and vegetables (conventional and organic)
Live Organic	Naccache, Tel: 04444886	Local and imported organic processed food
Naturalia	Hazmieh, Tel: 01397488	Local and imported organic processed food
Organic	Jounieh Highway, Tel: 09933116	Local and imported organic food (fresh and processed)
Organically	Al Wassat Street , Jal el Dib, Tel: 03579335	Local and imported organic food (fresh and processed)
Tawlet	12 Naher Street, Achrafieh , 01448129	Souk el Tayyeb retail shop and restaurant specialized in local, healthy, and organic food

Annexe.4. Producers of mouneh and Lebanese specialty agro-processed food

Producer type	Producer	Brand Name	Address	Main products
Agro-processor	Adonis Valley	Adonis Valley	Fatri	Preserved tomato sauces, oregano, honey, specialty food (Organic)
	Liban Village	Fleur de lait	Fatri	Dairy products
	Laiterie du Domaine de Tanail	Laiterie du Monastere de Tanail	Bekaa	Dairy products
	Olive Trade	Zejd	North Lebanon	Olives and olive oil (Organic)
	Mymoune	Mymoune	Ain el Qabu	Jams, syrups, compotes, and specialty food
	Kounouz Loubnan	Kounouz Loubnan	Werhanieh, Shouf	All mouneh products
	Baytna	Baytna	Hammana	All mouneh products
	Zaatar zawtar	Zaatar zawtar	Zawtar	Oregano products (Organic)
	Al Koara	Koara	Kfarkatra	Diet food (Organic)
Cooperatives and development projects	Maronite Order	Adyar	Different Maronite monasteries	Wine and other mouneh products (organic)
	BioCoop Lubnan	Campania	All over Lebanon	Organic products: juice, jams, herbs (Organic)
	Caritas	Intajouna	All over Lebanon	Jams, pickles, syrups
	arcenciel	Wataneh	All over Lebanon	Jams, pickles, syrups, herbs
	CRTDA	Namlieh	All over Lebanon	Jams, pickles, syrups
	Shouf Cedars Reserve	Shouf Cedars	Shouf Mountains	All mouneh products
	YMCA	Atayeb el Rif	All over Lebanon	All mouneh products
	Rachaya Women Cooperative	Wadi el Taym	Rachaya	All mouneh products and preserved traditional meals
	Green Hand Cooperative	N/A	Aabay, Shouf	All mouneh products
Tannourine Cedars Reserve	Tannourine Reserve	Tannourine	All mouneh products	



Annexe.5. Jabal Moussa Biosphere Reserve visitors survey questionnaire

Nationality: _____

Profession: _____

Address: _____

Age: 15-25 25-35 35-45 45-55 55-65 >65

Sex: M F

Are you interested in buying local produce of Jabal Moussa Biosphere Reserve?

Yes No

If yes:

Would you like to buy agro-processed products? Yes No

Would you like to buy handicraft products? Yes No

Would you like to buy both products? Yes No

What amount of money would you spend to buy local products?

Amount in LBP	Agro-produce	Handicrafts
5,000 to 15,000		
16,000 to 25,000		
26,000 to 35,000		
36,000 to 50,000		
> 50,000		

Select one or many of the following agro-produce you wish buy from Jabal Moussa Biosphere Reserve

- Syrups
- Jams
- Honey
- Herbs
- Pickles
- Specialty food: such as Keshek, Summak, Hosrom, etc.

Select one or many of the following handicraft you wish buy from Jabal Moussa Biosphere Reserve

- Decorated soap
- Home decoration items
- Wood decoration items
- Traditional hiking stick
- Tailor made handicrafts

If you would like to buy Jabal Moussa Biosphere Reserve products from outside the Reserve, where would be your favorite channel?

- Supermarket
- Local grocery shops
- Specialty food shops
- Exhibitions
- Home delivery

Thank you for your cooperation - APJM



Annex.6. Price comparison of agro-processed products on the Lebanese market (in LBP)

Product name	Weight	Industrial production price	Semi industrial production price	Homemade production price
Olive oil	500 ml	5,000	7,500	In Tank of 16 L 200,000
Aromatized olive oil	330 ml	4,000	6,000	8,000
Preserved olives	850 g	5,000	8,000	12,000
Arak	750 ml	15,000	20,000	25,000
Wine	750 ml	10,000	15,000	15,000
Fruit Liquors	500 ml	8,000	10,000	10,000
Honey	850 g	20,000	30,000	40,000
Grape molasses	450 g	6,000	8,000	10,000
Carob molasses	450 g	6,000	8,000	10,000
Pomegranate molasses	500 ml	12,000	16,000	20,000
Rose Syrup	500 ml	4,000	7,500	10,000
Mulberry Syrup	500 ml	4,000	7,500	10,000
Apricot Syrup	500 ml	4,000	7,500	10,000
Strawberry Syrup	500 ml	4,000	7,500	10,000
Apple Jam	850 g	4,000	7,500	10,000
Apricot Jam	850 g	5,000	8,000	12,000
Quince Jam	850 g	5,000	8,000	12,000
Fig Jam	850 g	6,000	10,000	14,000
Grape Jam	850 g	6,000	10,000	14,000
Strawberry Jam	850 g	6,000	10,000	14,000
Apricot Compote	450 g	5,000	5,000	6,000
Cherries Compote	450 g	5,000	5,000	6,000
Peaches Compote	450 g	5,000	5,000	6,000
Pear Compote	450 g	5,000	5,000	6,000
Tomato sauce <i>Rebb</i>	450 g	5,000	7,500	10,000
<i>Zaatar</i> Oregano	1 Kg	15,000	20,000	25,000
Sumac	1 Kg	15,000	20,000	25,000
Kishk	1 Kg	20,000	25,000	30,000
Cucumber pickles	850 g	4,000	6,000	8,000
Wild cucumber pickles	850 g	4,000	6,000	8,000
Mixed vegetables pickles	850 g	4,000	6,000	8,000
Preserved eggplants	850 g	6,000	8,000	10,000
Hosrom	500 ml	7,500	10,000	12,000
Apple vinegar	500 ml	3,000	5,000	6,000
Grape vinegar	500 ml	3,000	5,000	6,000