

CHERRY MARKET ANALYSIS

INTERNATIONAL NETWORK FOR THE ECOSUSTAINABLE DEVELOPMENT AND PRODUCTIVE, MANAGERIAL AND COMMERCIAL INNOVATION OF THE SMALL PRODUCERS INVOLVED IN THE CHERRY VALUE CHAIN IN LEBANON

2019



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List of Attachments (separate documents):

Word document: "Syndicate members Lists"

PDF document: "Association Traders' List"

Excel document: "Final Compiled data of Cherry Buyers_Feb 2019"

1- Objective of the study

Cherries have a short shelf life which creates risk at all levels of the value chain and limits the sales window to few days from harvesting to end-consumption if no effective cold chain management is applied. Most farmers are small-scale farmers and unable to achieve economies of scale. Hence, better marketing opportunities and innovations for both fresh and processed produce should be sought for.

The present study seeks to list and describe potential buyers with whom farmers can link to and explore better marketing channels and contracts.

2- Methodology

Primary and secondary data collection was conducted from October 2018 to January 2019.

Secondary data collection is mainly done through a desk study and aims at gathering information about the market trends of cherry production in Lebanon and the export market relatively.

Primary data collection includes both qualitative and quantitative data using Key Informant Interviews (KIIs) through formal interviews with selected cherry stakeholders and buyers.

Processors are agro-industry units processing cherries to by-products and they buy fresh produce from farmers and/or wholesale market outlets.

Dealers are all those who are potential buyers from farmers of the fresh cherries produce and they are the wholesalers, aggregators, traders and retailers (hypermarkets, supermarkets, fruits and vegetables specialty shops, restaurants...)

Three types of questionnaires were developed:

- 1- Cherry buyers' questionnaire (annex 1)
- 2- Cherry processors' questionnaire (annex 2)
- 3- Short questionnaire for shops (cherries and apricots) (annex 3)

The first two questionnaires showed to have some drawbacks noticed while filling them as some information was not easy to collect and the interviewee was not able or reluctant to give specific details relevant to the quantities and prices per variety dealt with but rather gave averages and general trends. This might be due to lack of documentation of such details in their records.

The total quantity purchased per season was estimated by the researchers by multiplying the amount of produce purchased per transaction by 60; 60 is referring to the number of days for the cherry season of almost 2 months.

The short questionnaire was hence developed to gather information from buyers in a systematic way. This method revealed to be more efficient than the first set of questions.

Unlike farmers, buyers are difficult to contact and take appointments with due to their time constraints and busy schedule and out of office type of work; more than one meeting was needed to accomplish a single interview in most of the cases.

The questions are open-ended in order to obtain as much information as possible. They are mainly focused on NEHO (Needs, Expectations, Habits, and Occasions).

Each “questionnaire” covers 4 main sections:

- I. General information
- II. Market products and sourcing of fresh cherry (product requirements: quantity, variety, price...)
- III. Sourcing logistics
- IV. Marketing (not applicable for supermarkets and retail shops)
- V. Future Forecasts and comments that the buyers or processors might have for the producers or for the sector in general.

All collected data is summarized and compiled in one excel table to facilitate access to information when needed (Attached excel document “Compiled Data of potential buyers and processors for cherries”).

Moreover, probing and observation throughout the assessment helped gain a better understanding of the physical environment, practices, attitudes, perceptions, and stereotypes.

Few voice recording were saved as a reference for the interviews however not all interviewees accepted to have the conversation recorded.

Sampling

No relevant lists of stakeholders were available to be able to statistically select the informants. The key informants selected for the research were identified by an online search, personal contacts, referrals and from a compiled list of contacts sourced from diverse syndicates (Attached word document “Syndicate members lists”); in addition to a booklet for the

‘Association of Importers and Traders of agricultural production in Lebanon’ (Attached pdf document: “Association Traders’ list”).

The lists were filtered according to the relevant targeted regions (Beirut, Mount Lebanon and Bekaa). This was based on personal knowledge and on contacting the stakeholders by phone to identify field of work of each stakeholder and inquire about more stakeholders in the field of cherry to refer to (snowball method).

Stakeholders identified and contacted (relevant for the study)

Interviewed stakeholders:

Type	Cherries
Traders exporters	7
Processors	3
Hyper/supermarkets	66
Fruits and vegetables	23
Wholesale	9
Buyers of processed	+12
Total	120

An excel sheet was developed summarizing all the information gathered.

The 20 cold storages contacted are in 2 targeted areas Mount Lebanon and Bekaa, it was concluded that cold storage units are not potential buyers for cherries but service providers. The 2 cold storages that were identified relevant to the study, but not added to the table, are not potential buyers but accept to store cherries; other storages do not store cherries since these fruits have a short life in the cooling facilities making it not feasible to cool.

Furthermore, Jarjoura market in Chtaura (Bekaa) and Stop N Shop (retail) in Adonis and Naccashe (Kesrwan), Al Rifai nuts dealer, Ritage Restaurant, and Ghia Holding the owner of restaurants “Abed el Wahab” and “Ahwak” were interviewed to explore the potential of buying dried cherries or any other processed by-product of this fruit.

3- Results and value chain linkages

The extensive data is available in one excel document with separate sheets for each category of buyers: traders who are aggregators and exporters, processors, wholesale markets, retail

markets. Each section deals with the following sub-sections: general information; varieties demanded and requirements; sourcing and logistics; future forecasts and comments.

The excel data sheet compiling all this information is available as a single separate document (Attached excel document “Compiled data of potential buyers and processors for cherries”).

Processors:

From the total 32 processors interviewed, only 3 deal with cherry. Cherry jam, is the main cherry by-product produced in Lebanon, while still not demanded in big quantities. Other by-products, such as cherry syrups are only produced by Al Rabih and Kassatly.

The processors are found in different Lebanese regions and not concentrated in one area. They are in the Metn region such as Amchit, Sad El Bauchriye, and Ein El Remmeh; and in the Bekaa region such as Taanayel, Chtaura and Mreijet.

Varieties Demanded and Requirements

Table 1: Cherry varieties demanded and processors’ requirements

Name of potential buyer	by-product produced	Cherry Variety required	Quantity/ variety	Price/ kg	Quantity per transaction per variety	Frequency of cherry requirement per variety
Al Rabih	jam, syrup	Banni	A maximum of 10 tons	Average \$ 0.9	One truck of 10 tons per season	Once a season
Wadih Kassatly	syrup for liquor	Banni	100 - 200 kg	average \$0.9	100 - 200 Kg	once a season
Conserva Chtaura	Jam	Banni, Kalb el teir, kawz kozah	10 tons mixed	\$0.8 - \$1.2	one truck of 10 tons per season	once a season

Cherry processors purchase mainly the Banni variety for their production since the Banni variety provides a sweet taste and requires less sugar to be added to the jam, however, Banni could be mixed with Kawz Kozah and Kalb el Teir varieties for enhanced flavor.

Each cherry processor purchases between 5 to 15 tons of cherry per season with a price ranging between 0.8 USD and 1.2 USD per kilogram, depending on the yield of cherries in the season and the period during which it is being sold during the peak production or out of season. The produce is to be delivered to the processors.

The quality required by the processors of cherry is not specific, the only quality condition that processors ask for is for the fruits not to be damaged, infected or deformed and have an acceptable size.

Processors do not require any extra services from their suppliers such as pitting or sorting since each processing unit has its own pitting and sorting machine. The cherries are sorted at the factory level where unsuitable produce for processing is removed and the price of wasted cherries is deducted from the price to be paid to farmers.

Sourcing and Logistics

Table 2: Sourcing and logistics of cherries

Name of potential buyer of cherry	Packaging required per variety	region/s	from whom do you purchase your cherries	Means of transportation	Logistics
Wadih Kassatly	7 kg plastic crates	Bekaa	Farmer	unrefrigerated trucks	not specific since very small quantity
Al Rabih	7 kg plastic crates	Bekaa	aggregator, wholesale	unrefrigerated trucks	the cherry produce to be delivered by supplier
Conserva Chtaura	7 kg plastic crates	Bekaa	farmer, aggregator	unrefrigerated trucks	the cherry produce to be delivered by supplier

Cherry processors are not interested in any packaging for the produce. They prefer receiving the produce in 7kg plastic crates since it will be immediately sent to processing. The main region for processors to source their cherry is the Bekaa region, mainly the villages of Kaa and

Labwe. Processors usually deal with aggregators and farmers to supply them with cherry, the suppliers are expected to deliver their produce to the processors in unrefrigerated trucks early in the morning to avoid the sun and the heat during the day. Processors also require that the supplier contacts them a month prior to harvest season to agree on the quality and quantity to be supplied.

Since processors are taking large quantities of fruits, the general payment agreement with the suppliers are checks that are given at the end of the season for all the quantity purchased per transaction deducting the quantities sorted as unsuitable for processing. Processors face challenges when sourcing their supply of cherry whereby there is no stable supply of good quality produce.

Future Forecasts and Comments

Processors are all interested in collaborating with farmers and farmer groups to supply them with cherries, however, they are not interested in any specific labelling for the product. The lack of interest in labelled products might be explained but the unwillingness to pay more for labelled products and the lack of trust in the agricultural practices and labels. The processors encourage the farmers to improve their agricultural practices in order to provide good quality fruits and improve the post-harvest practices to minimize damages and waste.

3.3 Wholesale markets

The Ferzol wholesale market is the closest market to the cherry production areas and therefore is an important aggregation point for cherries. Wholesale markets are typically consignment markets where the local production is connected to domestic and export markets. Wholesale markets are managed as a private business where the official commission fee for merchants is 7 to 10% on the sales value, and any farmer is welcome to sell their produce to a wholesaler if they provide a minimum quantity of 100 Kg per transaction. The wholesale market welcomes all varieties of cherries for there is a demand for each variety and quality or grade. In that sense, the cherries can be delivered sorted into grades or unsorted. The price of sorted produce differs according to the grade, and the unsorted produce receives an average price or a lower price.

For the means of delivery, farmers are expected to transport their produce to the wholesale market themselves, usually delivered in unrefrigerated trucks, in 7 kg plastic crates. The

wholesalers do not repack the fruits in other crates, they leave the fruits in the plastic crates since consumers prefer to hand pick their fruits as mentioned by one of the wholesalers. Cherries at the wholesale market are sold at prices ranging from 0.6 USD/Kg to 7 USD/Kg according to the variety, quality, and quantity purchased. The wholesalers pay by checks to the farmers at the end of the season based on the quantity of produce sold. The wholesale market is not interested in having the products labelled since there is no trust in what the label indicates. Ferzol area being close to the Syrian borders, wholesalers mentioned that there is a big competition with the Syrian produce specially that large quantities are being smuggled in at cheaper prices which makes it hard for the Lebanese farmers to compete with.

3.4 Retail markets

Retail domestic markets deal mainly with fresh cherries of all grades and on a lower scale with processed cherries. These retail points of sale are:

- Hypermarket, supermarkets
- Small shops or groceries
- Restaurants, hotels and catering
- Nuts dealer

Small shops or groceries:

Processed cherries into dried fruits are desired on condition the quality is good and consistent. Stakeholders are willing to try the final product but are confident that any good product can sell. Stop N Shop deals with many small-scale processors for specific products and “believes that any attempt to develop a good quality product can grow into a large business”.

Nuts dealers:

Al Rifai is interested in buying available quantities of dried cherries for local and export markets. The condition is for the product to conform to EU regulations and standards, especially for sulphite residues.

They tried it once from a supplier who imported it (not known source of origin) but it is not available anymore.

Restaurants:

“Ritage” a high end restaurant in Beirut was approached. An interview with the renowned chef Maroun Chedid was conducted. Chef Maroun affirmed his interest in having a women cooperative trained for his special recipe of jam to be used in his meals. The quantities and conditions of this cooperation is to be further discussed by the cooperatives themselves.

Ghia Holdings (Restaurants St Nicholas and “Ahwak”):

“Ahwak” is another high end restaurant in Beirut which uses cherry jam in his recipes and might be another opportunity for the cooperative to link with.

Fruits & Vegetables Specialty Shops

After interviewing 22 specialty shops for fruits and vegetables around the areas of Beirut and Mount Lebanon, it was concluded that most of these shops have certain responsible personnel reaching out for wholesale markets and purchasing the fruits and vegetables of good quality at convenient prices they chose. Most are interested in linking directly with farmers but it is to be noted that the quantities sold in this segment are low and the logistics include direct delivery to the point of sale which can incur some extra transportation cost to be accounted for.

Conclusions and Recommendations

The present study assessed the potential buyers and processors of cherries relevant to the Bekaa region.

Fresh products are easily sold to wholesale markets and are also exported, however the farmers do not always fetch a fair price because they depend on the traders but also because the produce is not of a good quality. Sorting and grading are not usually done by the producers at farm level as it incurs higher investment cost and buyers do not trust the sorting and grading done by the producers. Labelling for good agricultural practices or other standards are not desired by all buyers; some showed interest and other showed a distrust in any label. Nevertheless, the buyers need to receive better quality for the fresh consumption; while the processing units sort and grade themselves. Processors do not require any extra services from their suppliers since they have their own pitting and sorting machines.

Dried cherries are demanded but are not present in the local market which shows a potential of developing such product. Processing cherries has an opportunity to find good marketing channels (specialty shops and nut dealers lack dried cherries (a cost-profit and price analysis is

very important to determine competitiveness), restaurants are using a special jam recipe for their fine dining recipes).

Buyers prefer to work with organized groups of farmers to make sure they can deliver the required quantities and quality on a timely basis. It is to the advantage of the producers themselves since they will have a better negotiating power and better deals.

Recommendations:

In order to improve the marketing potential and the profit for the producers several interventions are to be sought for as follows:

Sorted products into different levels/ grades before entering the market.

Grade A	Premium Price + Decrease loss (Premium quality)
	<ul style="list-style-type: none">•Speciality shops and supermarkets•Exporters and aggregators•Wholesale
Grade B	Good Price + Decrease loss
	<ul style="list-style-type: none">•Aggregators•Wholesale
Processing	Economic return (Good quality)
	<ul style="list-style-type: none">•Processors•Processing cooperatives

Figure 1: Sorting of Cherries into different grades

Once sorted each Grade takes its market track, this will ease logistics and reduce marketing cost as each Grade is oriented towards its buyers; although it is an additional cost at the farmer level or cooperative level it will bring a future gain and trust. This will enable to tailor the produce according to certain market channel needs, in terms of packaging, quality, and quantity required in hand with the delivery schedule and logistics; aiming to build trust with any buyer in terms of timely delivery of agreed upon quality and quantity of produce.

Grade A cherries fetch better prices at different markets segments: exporters & aggregators, wholesale and some of the speciality retail stores. As discussed with several stakeholders (exporters, and traders) Grade A can reach \$10/Kg at wholesale level during early and late harvesting periods; in addition, if the produce is well sorted and Grade A is in shortage it will still fetch \$5-6/Kg during harvest periods. Price fluctuation depends on stone fruits

availability, and cherry qualities present. At the Exporter and aggregator level, sorting will decrease cost of sorting at the exporter level and logistics of different grades return or sending them to the wholesale. Through time trust can be built affecting higher sales. Grade B and Processing: farmers can make agreements ahead of harvesting period with the processors to sell the quantities required by the latter. Dried cherries are demanded but are not present in the local market which shows a potential of developing such product. Processing cherries has an opportunity to find good marketing channels (specialty shops lack dried cherries, restaurants are using a special jam recipe for their fine dining recipes).

Advantages of Sorting	Disadvantages of Sorting
<ul style="list-style-type: none"> ➤ Channeling each grade to its specific market sector ➤ Higher quantities of sales, and decreasing market returns to farmer or wasted produce ➤ Gaining sorted brand trust at market level with homogeneity of Grade ➤ Improved marketing negotiation power and better deals; contractual supply ➤ Efficient use of cold storage for high Grades cherry ➤ Holding each farmer accountable to his production quality/ paving way to improvement and tracking 	<ul style="list-style-type: none"> ➤ Higher cost to farmer ➤ Risk of mechanical damage if not handled well during sorting

Cold Storage room

A cold storage room is beneficial to get robust on fluctuating prices. Grade A and Grade B cherries flood the market on a period of 2 months and sometimes on a daily basis. As informed prices fluctuate every 4 days depending on supply and demand that cannot be foreseen. In that matter having a cold room will play as a buffer of time to price for the cherries produced and when directly linked to the diverse channels, the producers will have gained the commission fee of 7-10% that the wholesale will charge.

Channels:

Retail shops (supermarkets and F&V big stores), farmers can deal with this segment who would offer price and quantities to be taken depending on the high quality and season; Such as Akiki, Charcutier Aoun, Fahed, and Carrefour. A factor of consideration is the cold storage that some shops are not aware of its importance; stores should possess a good cold storage for delivery and completing the cold chain of the produce to achieve longer shelf life and quality otherwise it plays a negative factor when temperatures fluctuate leading to a lower shelf-life of Cherries.

Refrigerated or isolated truck for transport:

Would keep produce from getting heat damaged especially when delivering to Beirut markets on a summer day. Refrigerated trucks will decrease loss due to transportation to exporters, to supermarket chains, and to wholesale (only if possesses a cold storage himself).

Awareness campaign on cherry cold chain for both local market (wholesale and stores), and consumers

At stores (whether small or large) cherry is displayed in a crate in room temperature open for consumers to hand pick their needed quantity and quality. Awareness spreading on the importance of having cherry integrated in the cold chain.

Trials of dried cherry with diverse varieties to identify best variety for drying and specific harvest time; this will help in assessing sugar content, shelf-life, and increased ration from fresh to dry product.

Additional recommendations:

- Develop an information system to inform farmers on the prices at the different wholesale markets on a daily basis to allow them to take decisions on their marketing channels.
- Ensure that the crates in which the produce is reaching the market are up to the required cleanliness, conditions, and weight.
- Invest in small packages of “one kilogram” based on a pre-agreement with buyers only when it is feasible to do so to cover the cost of the packaging (labor and package); this is

usually early or late in the season when the produce can fetch a high price (Buyers readiness: Akiki F&V, Fahed hypermarket)

- Developing business plans for items in demand e.g. dried cherries, packaged cherries into 0.5 kg and 1kg crates, cold chain development and its economic impact with a profit-cost analysis taking into account price relative to consumer purchasing power.

Annex 1: Cherry Buyers' questionnaire

International network for the Ecosustainable development and productive, managerial and commercial innovation of the small producers involved in the cherry value chain in Lebanon

Name of interviewer: Date: Place:.....

Cherry value chain: Buyers

I. General Information:

Name of company:

Status (might have more than one role):

- Wholesaler Aggregator Trader Retailer
 other (specify)...

Name of interviewee:

Status of interviewee: owner

Employee and position:

1. How long have you been in this business? Year of establishment:

2. How many available branches:

2. a Number of available branches:

2. b Location (enumerate all locations):

II. Market products and sourcing of fresh cherries:

3. Which cherry variety (ies) do you require/ purchase for your enterprise?

(The same variety can have a different name, state it next to corresponding name)

- Var 1: Taliani
 Var 2: Feraouni
 Var 3: Zahry
 Var 5: Baskintawi
 Var 6: Banny
 Var 7: Moukahal

- Var 8: Irani
- Other Variety:

4. Which grades do you purchase (interviewer should ask details on each grade stated below such as “what criteria are relevant to each grade (size, color, free of damages, etc)

5. (Interviewer to repeat the varieties stated above and ask details for each one by filling table below)

Cherry Variety Demanded	Grade required	Quantity Purchased	Price/kg (range of prices) Specify \$ or LL	Season of procurement: From Month x to month y	Regularity of procurement (daily, once a week, once a month in season - out of season...))

III. Sourcing Logistics:

6. Where do you get the fresh cherries from:

7.a Locally source: (Metn, Bekaa, North)
 State main villages if possible:

7.b Internationally source:

7. From whom do you purchase the cherries from:

- Trader, specify name(s):.....
- Farmer, specify name(s):.....
- Wholesale market, specify name(s):.....
- Other (specify):

8. What are the means of transportation of the cherries to your company:

- Refrigerated pick up
- Non refrigerated pick up

9. What is type of packaging you receive the cherries in:

- plastic crates of 7 kg
- other (describe weight and material_plastic or other):.....

10. Do you change the package before marketing it? Yes No

(if Yes, details will be mentioned in section “IV Marketing”)

11. What is the agreed upon payment method with your suppliers?

- Contractual (describe)
- Upon delivery payment
- Seasonal agreements
- Other (specify):.....

12. What are the challenges you face when sourcing your cherries products locally?

- a. Low quality
- b. Short shelf life
- c. Not well packaged
- d. Harvested Mature
- e. Harvested Premature
- f. Other:
- g. None

13. Are you satisfied with the current delivery and logistics of the cherries products? Yes

No

If answer is no, why:

14. What are your recommendations/ demands for logistics for the next season? Explain

- a. Packaging:
- b. Cooling:
- c. Delivery time:

d. Harvest time:

e. Other:

15. If the recommended services were provided, will you be willing to pay for extra logistics services (cooled truck delivery, improved frequency of delivery, time of delivery, different or improved packing, etc)?

Yes If yes, how much in terms of % (additional cost compared to initial price):

.....

No

IV. Marketing (not applicable for supermarkets and retail shops)

16. If trader or aggregator: Who are your buyers (details to be filled in table below):

Name of buyer: Trade name, full name and contact when available	Possession of a refrigerated truck (Yes/No)	Type of package required by buyer if different than the one received in (check question 9 and 10 in "section III")	What are the largest quantities per buyer	Comments

V. Future Forecasts:

17. Are you willing to work with a new supplier to receive fresh cherries or cherry by-products? Noting that the supplier can be a group of farmers or a cooperative of farmers who can provide the product based on your specifications (sorted, packed, pitted cherries/seeds taken out, other pre-processed form...)
18. If yes to question 17, what are your requirements in terms of:
- Quantity:
 - Quality:
 - Logistics:
 - Packaging:
19. Are you willing to deal with more than 1 supplier if quantities are not met? Yes No
20. What are the forecasts you see happening in the fresh cherry sector? (increase in demand, new products, other...)
21. Do you have any recommendations you would advise the farmers to do in terms of:
- Their production:
 - Their marketing strategies:
22. A general question on processed apricots: What are the main cherry by-products found in the market? (jam, yogurt,..)

cherry by-products: For Supermarkets

23. What are the cherry by-products sold at the supermarket:

By-product	Source (a-local b-imported)	Type of package	What are the quantities sold of each by- product (in percentages) compared to the total cherry by-products	Comments

24. What are your recommendations for local processors?

25. Are you willing to buy locally processed cherry by-products in small quantities?

Annex 2: cherry processors' questionnaire

International network for the Ecosustainable development and productive, managerial and commercial innovation of the small producers involved in the cherry value chain in Lebanon

Name of interviewer: Date: Place:.....

Cherry value chain: Processors

II. General Information:

Name of company:

Status (might have more than one role):

Processor other (specify):.....

Name of interviewee:

Status of interviewee: owner

employee and position:

26. How long have you been in this business? Year of establishment:

27. How many available branches:

2.a Number of available branches:

2.b Location (enumerate all locations):

II. Market products and sourcing:

1. What are the main cherry by-products that you produce? (jam, yogurt)

2. Are there any other processed products that can be produced from cherry that you know of?

3. If answer to question 2 is yes, where are those processed products procured from:

locally imported

4. Which cherry variety(ies) do you require/ purchase for your processing line(s)?

(the same variety can have a different name, state it next to corresponding name)

- Var 1: Taliani
- Var 2: Feraouni
- Var 3: Zahry
- Var 5: Baskintawi
- Var 6: Banny
- Var 7: Moukahal
- Var 8: Irani
- Other Variety:

5. Which grades do you purchase? (interviewer should ask details on each grade stated below such as “what criteria are relevant to each grade (size, color, free of damages, etc))

6. (Interviewer to repeat the varieties stated above and ask details for each one by filling table below)

Cherry Variety Demanded	Grade required	Quantity Purchased	Price/kg (range of prices) Specify \$ or LL	Season of procurement: From Month x to month y	Regularity of procurement (daily, once a week, once a month in season - out of season...))

III. Sourcing Logistics:

7. Where do you get the fresh cherries from:

7.a Locally source: (Metn, Bekaa, North)

State villages if possible:.....

7.b Internationally Source:

8. From whom do you purchase the cherries from:

trader, specify name(s):.....

farmer, specify name(s):.....

wholesale market, specify name(s):.....

other (specify):

9. What are the means of transportation of the cherries to your company:

refrigerated pick up

non refrigerated pick up

10. What is type of packaging you receive the cherries in:

plastic crates of 7 kg

other (describe weight and material _plastic or other):

11. What is the agreed upon payment method with your suppliers?

Contractual (describe)

Upon delivery payment

Seasonal agreements

Other (specify):.....

12. What are the challenges you face when sourcing your cherry products locally?

h. Low quality

i. Short shelf life

j. Not well packaged

k. Harvested Mature

- l. Harvested Premature
- m. Other:
- n. None

13. Are you satisfied with the current delivery and logistics of the cherry products?

- Yes No

If answer is no, why:.....

14. What are your recommendations/ demands for logistics for the next season? Explain

- f. Packaging:
- g. Cooling:.....
- h. Delivery time:.....
- i. Harvest time:
- j. Other:

15. If the recommended services were provided, will you be willing to pay for extra logistics services (cooled truck delivery, improved frequency of delivery, time of delivery, different or improved packing, etc)?

- Yes If yes, how much in terms of % (additional cost compared to initial price):.....
- No

IV. Future Forecasts:

16. Are you willing to work with a new supplier to receive fresh cherries or cherry products?

Noting that the supplier can be a group of farmers or a cooperative of farmers who can provide the product based on your specifications (sorted, packed, pitted cherries/seeds taken out, other pre-processed form...)

17. If yes to question 16, what are your requirements in terms of:

- a. Quantity:
- b. Quality:
- c. Logistics:
- d. Packaging:

18. Are you willing to deal with more than 1 supplier if quantities are not met? Yes
No

19. What are the forecasts you see happening in the processed cherry sector? (increase in demand, new products, other....)

20. Do you have any recommendations you would advise the farmers to do in terms of:

- a. Their production:

- b. Their marketing strategies:

Annex 3: Short questionnaire for shops (cherries and apricots)

International network for the Ecosustainable development and productive, managerial and commercial innovation of the small producers involved in the cherry value chain in Lebanon

I. General Information:

Name _____ of _____ company:

Name and phone number of contact person in charge of Fruits and Vegetables procurement:

.....

1. How many available branches:
 2. a Number of available branches:
 2. b Location (enumerate all locations):

II. Market products and sourcing of fresh cherries:

2. Which cherry variety (ies) do you require/ purchase for your enterprise?
(The same variety can have a different name, state it next to corresponding name)
 - Var 1: Taliani
 - Var 2: Feraouni
 - Var 3: Zahry
 - Var 5: Baskintawi
 - Var 6: Banny
 - Var 7: Moukahal
 - Var 8: Irani
 - Other Variety:

3. Which apricot variety (ies) do you require/ purchase for your enterprise?
(The same variety can have a different name, state it next to corresponding name)
 - Var 1: Um Hussein
 - Var 2: Dehabe
 - Var 3: Ajami
 - Var 5: Tilyani

- Var 6: Faransi
- Var 7: Amercani
- Other Variety:

4. Which grades do you purchase (interviewer should ask details on each grade stated below such as “what criteria are relevant to each grade (size, color, free of damages, etc))
5. What are the quantities dealt with last season:
- Cherries:
- Apricots:

III. Sourcing Logistics:

6. Where do you get the fresh **cherries** from:

- 6a Locally source: (Metn, Bekaa, North)
- State main villages if possible:
-
- 6.b Internationally source:

Where do you get the fresh **apricots** from:

- 6a Locally source: (Metn, Bekaa, North)
- State main villages if possible:
-
- 6.b Internationally source:

7. From whom do you purchase the **cherries** from:

- Trader, specify name(s):.....
- Farmer, specify name(s):.....
- Wholesale market, specify name(s):.....
- Other (specify):

From whom do you purchase the **apricots** from:

- Trader, specify name(s):.....
- Farmer, specify name(s):.....

- Wholesale market, specify name(s):.....
- Other (specify):

8. What are the means of transportation of the cherries and apricots to your company:

- Refrigerated pick up : cherries.... apricots
- Non refrigerated pick up: cherries.... apricots

9. What is type of packaging you receive the **cherries** in:

- plastic crates of 7 kg
- other (describe weight and material_plastic or other):.....

What is type of packaging you receive the **apricots** in:

- plastic crates of 7 kg
- other (describe weight and material_plastic or other):.....

10. Do you change the package before marketing it? Yes No

What is the type and weight of packages for cherries? For apricots?

11. What are the challenges you face when sourcing your cherry and apricot products locally?

- a. Low quality
- b. Short shelf life
- c. Not well packaged
- d. Harvested Mature
- e. Harvested Premature
- f. Other:
- g. None

V. Future Forecasts:

12. Are you willing to work with a new supplier to receive fresh cherries or cherry by-products? Noting that the supplier can be a group of farmers or a cooperative of farmers who can provide the product based on your specifications (sorted, packed, ...)

13. If yes to question 17, what are your requirements in terms of:

- a. Quantity: (how much per transaction and what is the frequency: daily basis, every 2 days, weekly?)

Minimum and maximum quantity for **cherries** per transaction:

Frequency of procurement:

Minimum and maximum quantity for **apricots** per transaction:

Frequency of procurement:

- b. Quality:

- c. Logistics:

14. Who delivers the products and where; or you get it from producers:

15. Whom to contact and when

16. Other conditions

17. Are you interested in receiving packages and what type for each produce:

Cherries:

Apricots:

18. Are you willing to deal with more than 1 supplier if quantities are not met? Yes
No

19. Are you willing to pay extra charges for a brand name on the packages?

20. If recommended services were provided, will you be willing to pay for extra logistics services (cooled truck delivery, improved frequency of delivery, time of delivery, different or improved packing, etc)?

Yes If yes, how much in terms of % (additional cost compared to initial price):

.....

No

21. Are you interested in receiving packages with a label indicating “the origin” of the product (name of cooperative, village etc)

22. Payment mode: (cash upon delivery, delayed check?)