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SUSTAINABLE FISHERIES MANAGEMENT PROJECT (SFMP)

Initial Visits and Production of Market Survey Title of Report



MARCH, 2017

THE
UNIVERSITY
OF RHODE ISLAND
GRADUATE SCHOOL
OF OCEANOGRAPHY



Development
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Citation: Development Action Association. Asare A. (2017). Initial Visits and Production of Market Survey. The USAID/Ghana Sustainable Fisheries Management Project (SFMP). Narragansett, RI: Coastal Resources Center, Graduate School of Oceanography, University of Rhode Island. GH2014_ACT127_DAA 39pp

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Prepared for USAID/Ghana under Cooperative Agreement (AID-641-A-15-00001), awarded on October 22, 2014 to the University of Rhode Island, and entitled the USAID/Ghana Sustainable Fisheries Management Project (SFMP).

This document is made possible by the support of the American People through the United States Agency for International Development (USAID). The views expressed and opinions contained in this report are those of the SFMP team and are not intended as statements of policy of either USAID or the cooperating organizations. As such, the contents of this report are the sole responsibility of the SFMP team and do not necessarily reflect the views of USAID or the United States Government.

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SNV: <http://www.snvworld.org/en/countries/ghana>

ACRONYMS

CCM	Centre for Coastal Management
CEWEFIA	Central and Western Region Fishmongers Improvement Association
CRC	Coastal Resource Center
CSLP	Coastal Sustainable Landscape Project
DAA	Development Action Association
DFAS	Department of Fisheries and Aquatic Science
DMFS	Department of Marine Fisheries Sciences
DQF	Daasgift Quality Foundation
FtF	Feed the Future
GIFA	Ghana Inshore Fishermen's Association
GIS	Geographic Information System
GNCFC	Ghana National Canoe Fishermen's Council
HM	Hen Mpoano
ICFG	Integrated Coastal and Fisheries Governance
MESTI	Ministry of Environment Science and Technology
MOFAD	Ministry of Fisheries and Aquaculture Development
NDPC	National Development Planning Commission
NGOs	Non-Governmental Organizations
SFMP	Sustainable Fisheries Management Project
SMEs	Small and Medium Enterprises
SNV	Netherlands Development Organization
SSG	SSG Advisors
STWG	Scientific and Technical Working Group
UCC	University of Cape Coast
URI	University of Rhode Island
USAID	United States Agency for International Development
WARFP	West Africa Regional Fisheries Development Program

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ACKNOWLEDGEMENT

DAA would like to thank all participating institutions, hotels, restaurants and individuals who participated in the market survey. Special mention will also be made of our hard working field enumerators who administered the survey questions.

SECTION 1: INTRODUCTION

1.1 General Background

The fisheries sector remains valuable in generating employment, supporting livelihoods, reducing poverty and ensuring food security. The sector employs both men and women. The men are engaged in the harvesting of the fish while, the women are involved in the post-harvest activities such as processing, storage and trading.

The objective of the USAID/SFMP project is to support the Government of Ghana to rebuild dwindling marine fish stocks through the adoption of responsible fishing practices.

As part of activities to improve fish post-harvest by SFMP is supporting DAA, to construct a state of the art Fisheries Training Center (DFTC) to train fish processors on improved and healthy fish processing practices and business management skills. . The center is currently under construction at Kokrobite, a fishing community in the Ga South Municipality in the Greater Accra Region.

The center which will be a green building, is situated about 5km off the Accra to Winneba highway covering a total of 280.3 m² usable floor space on 0.20acre or 807.5 m² (skewed 99.8x84.3ft) land size.

DAA Fisheries Training Center (DFTC) when completed, would help build the capacity of the artisanal fisher folks in fishing, fish processing and trading.

The Center will provide the following services to beneficiaries:

On-site and off-site Competency Based Training (CBT) services with accreditation from COTVET in the following areas:

- Best practices in fish processing
- Best practices in fishing
- Hygienic Fish Handling
- Entrepreneurship and Management
- Literacy, Numeracy and Safety protocols
- Coaching and Advisory services

1.2 Objectives of the Study

The main objective of this study is to explore the capacity of DAA Fisheries Training Center (DFTC) to produce and supply various forms of fish to local and formal markets in Ghana under healthy and hygienic conditions.

The market survey seeks to:

- Determine consumer preference for different kind of fish in Ghana.
- Determine consumers' consumption patterns in relation to volume and frequency.
- Identify the key potential fish sales outlets and develop a supply chain.
- Determine which fish species are preferred by the market.

SECTION 2: CHAPTER TWO

2.1 METHODOLOGY

2.1.1 Scope - Study Area

The study was carried out among three (3) main categories of fish consumers in the Greater Accra region of Ghana.

- Category 1 - Hotels, restaurants and academic institutions
- Category 2 - Super markets
- Category 3 - individual consumers drawn from financial institutions, individuals randomly sampled from the street and other corporate institutions.

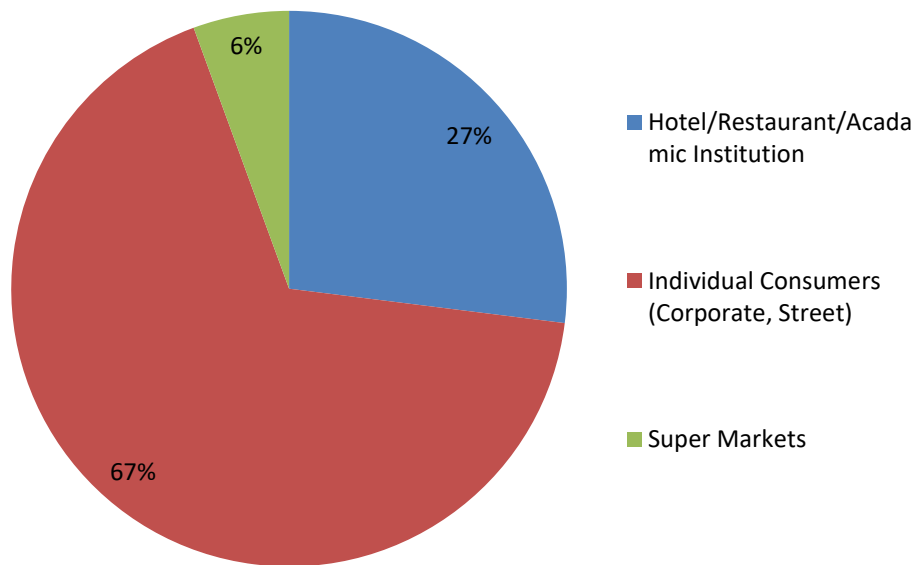


Figure 1. *Sampling Category*

2.1.2 Research Tool

A structured questionnaire and face – to - face interviews were used to gather data. The questionnaire consisted of an average of 33 questions for each of the three categories mentioned above with general demographical questions preceding all the three (3) categories. Each of the three category sections asks questions on consumer fish preferences, frequency of consumption, sales outlets, preferred choice of processed fish, hygienic preferences of processing fish, etc.

2.1.3 Sampling Procedure, Data Collection and Analysis

Simple Random Sampling (SRS), also referred to as randomized statistical sampling techniques was employed in the study. Random selection of members of public was based on the proximity, likeliness of usage of fish products. A total of 58, 12 and 145 people were sampled from categories 1, 2 and 3 respectively. No secondary data was used in the analysis of the primary data obtained from the survey.

Table 1. Sampling of respondents during the survey

Value	Frequency	Percentage
E. Individual Consumer (Corporate, Banks, offices, Street)	145	67.44
D. Hotel or Restaurant or Academic Institutions	58	26.98
C. Super Market	12	5.58

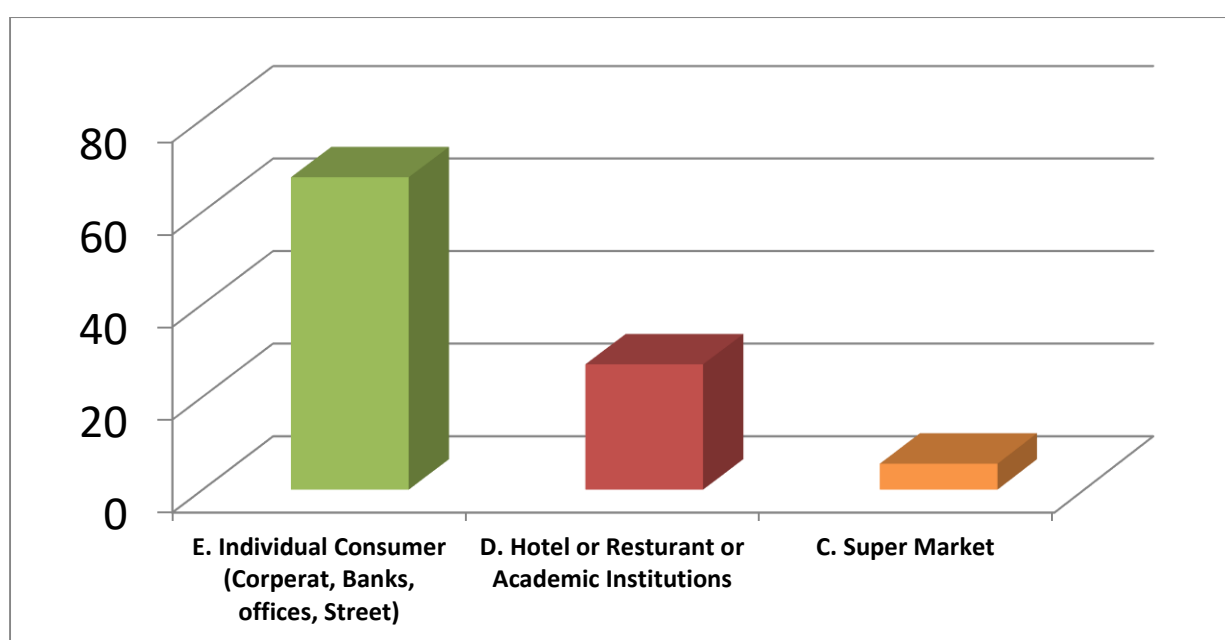


Figure 2. Sampling of respondents during the survey

Statistical analysis such as percentages, means and frequencies were used to contrast and interpret the results. In addition, descriptive statistics in the form of cross tabulations and charts were further used for analysis of the various variables.

2.1.4 Field Enumerators

Ten field enumerators consisting of 5 males and 5 females were recruited and trained for the field data collection. Each field enumerator surveyed sections of the three categories mentioned. The enumerators used paper based questionnaire for the face to face interview and later on entered the data into an electronic online data collection form using kobo toolbox software.

2.1.5 Limitation of the Study

The study respondents were located in parts of the Greater Accra region, with some individuals being contacted for the survey. The survey targeted 215 Individuals, Super markets, Hotels and Restaurants Surveyed in the Greater Accra Region.

SECTION 3: CHAPTER THREE

3.1 RESULTS AND DISCUSSION

This chapter discusses the main outcomes of the data collection and findings. The presentation of the results is done within the various sampling categories;

- Category 1 - Hotels, restaurants and academic institutions;
- Category 2 - Super markets and
- Category 3 - individual consumers drawn from financial institutions, individuals with the general category of demographic characteristics of all the respondents.

3.2 Demographic Characteristics and Gender

Respondents were questioned on their gender and educational levels. The reponses are shown in the table and graph below;

Value	Frequency	Percentage (%)
Female	118	54.88
Male	97	45.12

Table 2. Demographic Characteristics and Gender

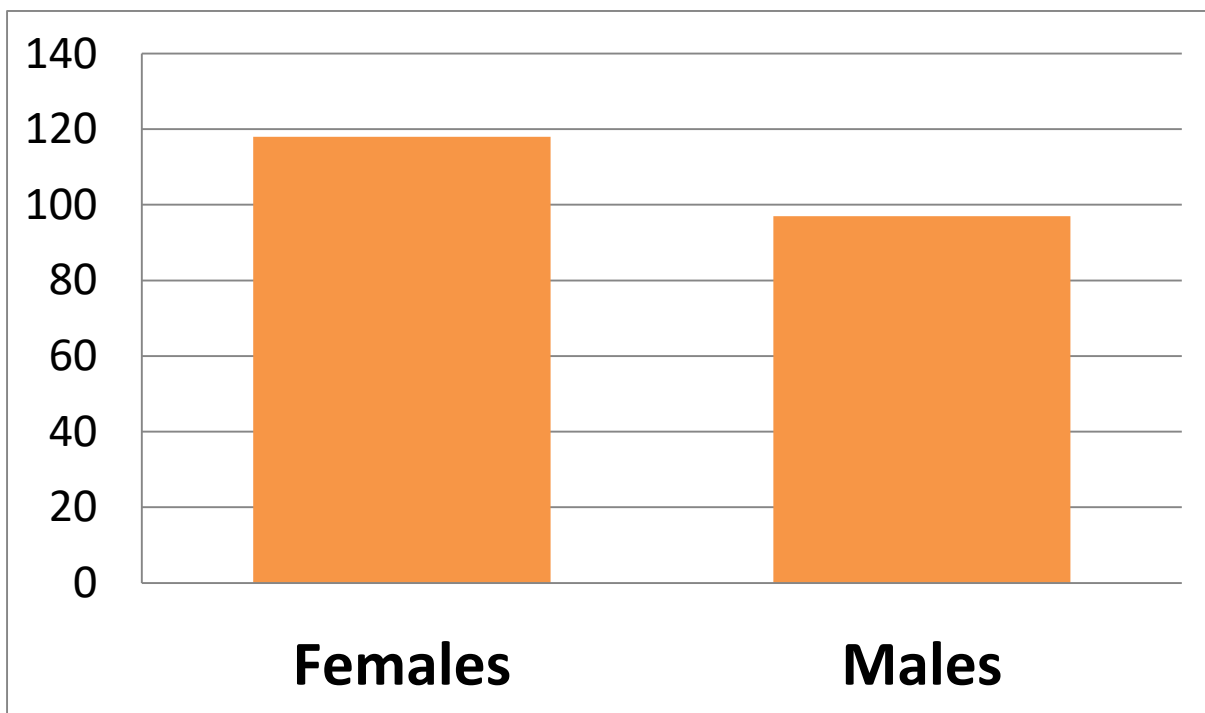


Figure 3. Demographic Characteristics and Gender

Value	Frequency	Percentage
SHS	55	25.58
Degree	53	24.65
Diploma	32	14.88
JHS	12	5.58
Other (Please Specify)	11	5.12
Primary	5	2.33

Table 3. Educational background

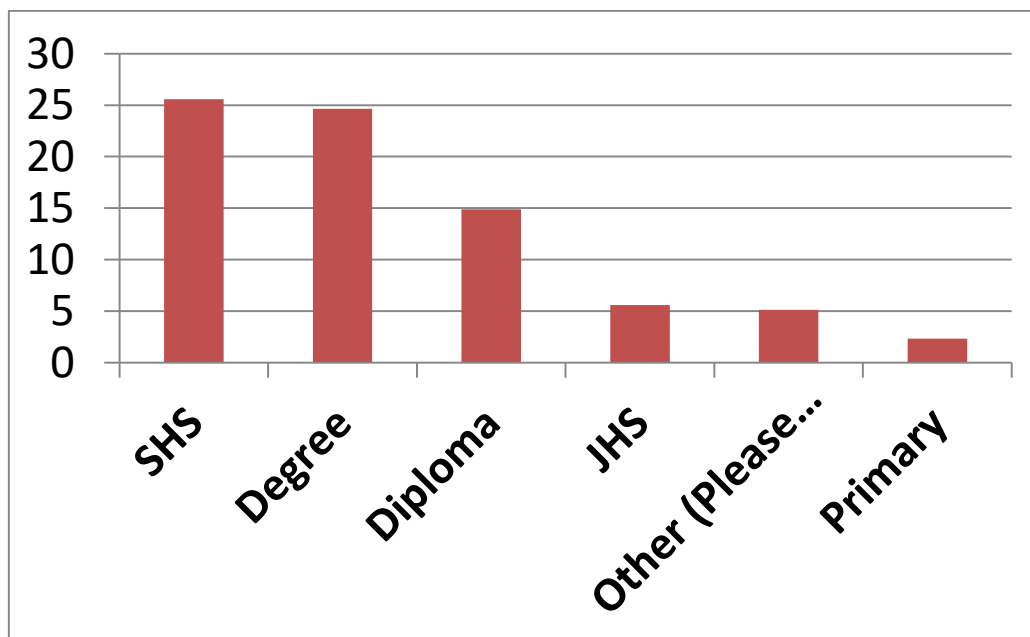


Figure 4. Educational background

3.3 Supermarket Results Analysis

3.3.1 How often do you source fish from this outlet?

Supermarkets were asked how often they procured fish for sale in their shops. Their responses are shown in the table below;

Table 4: How often do you source fish from this outlet

Value	Frequency	Percentage
Weekly	8	3.72
Daily	4	1.86

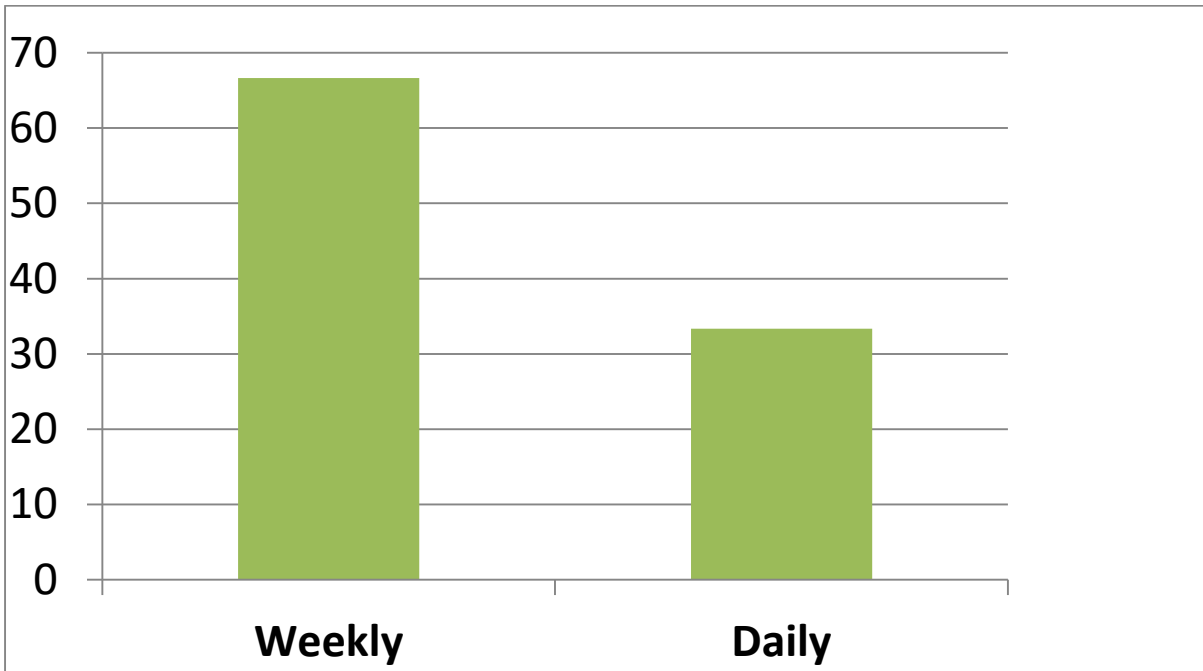


Figure 5: How often do you source fish from this outlet

3.3.2 Which of the following forms of fish do you sell? (Choose as many as apply)

Respondents were asked to indicate how they preferred their processed fish i.e. smoked, fresh, dried, salted, fried or fermented. The summarized results are shown below;

Table 5: Forms of fishes people seel

Value	Frequency	Percentage
Smoked fish	8	3.72
Fresh fish	7	3.26
Dried fish	4	1.86
Salted	3	1.4
Fried fish	3	1.4
Fermented fish	2	0.93

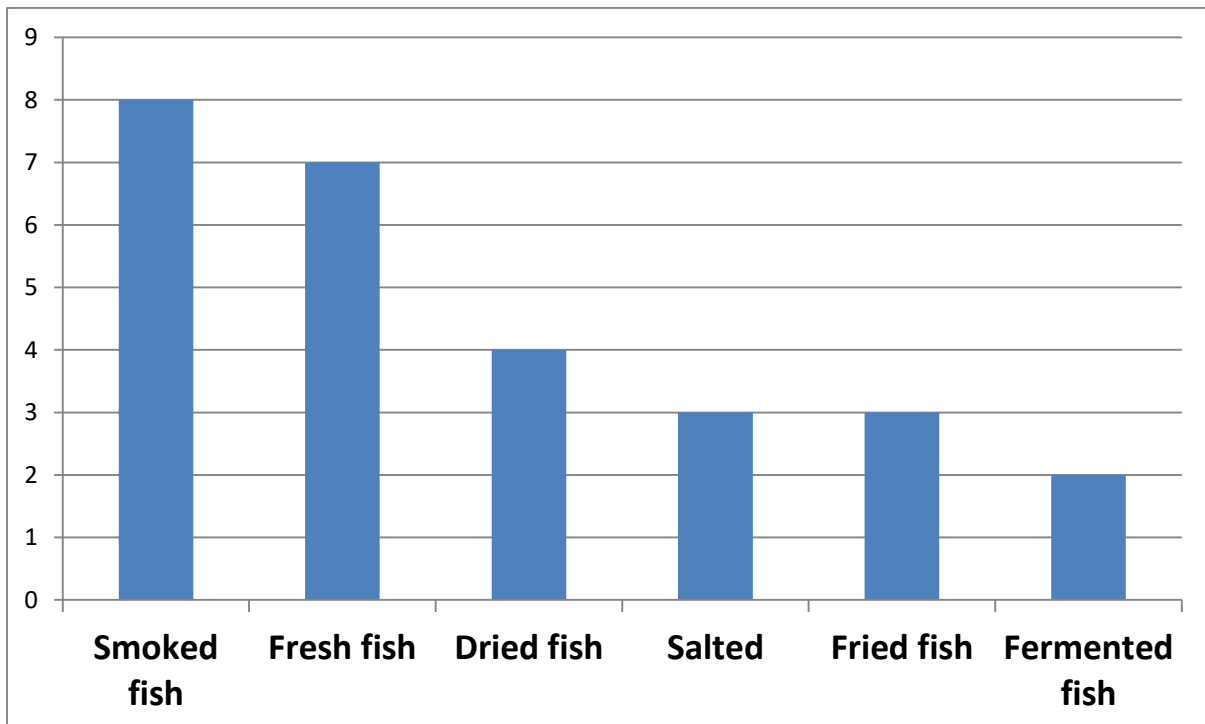


Figure 6: numbers of different types of fishes people sell

3.3.3 Which of the following forms of fish do you sell most per week? (Select 3 top most)

Supermarket owners were asked which type of processed fish they sell most in a week. From the survey, smoked fish sold better than salted and fried fish. The detailed results are shown below;

Table 6: forms of fish do you sell most per week?

Value	Frequency	Percentage
Smoked fish	8	3.72
Fresh fish	7	3.26
Dried fish	3	1.4
salted	2	0.93
Fried fish	2	0.93

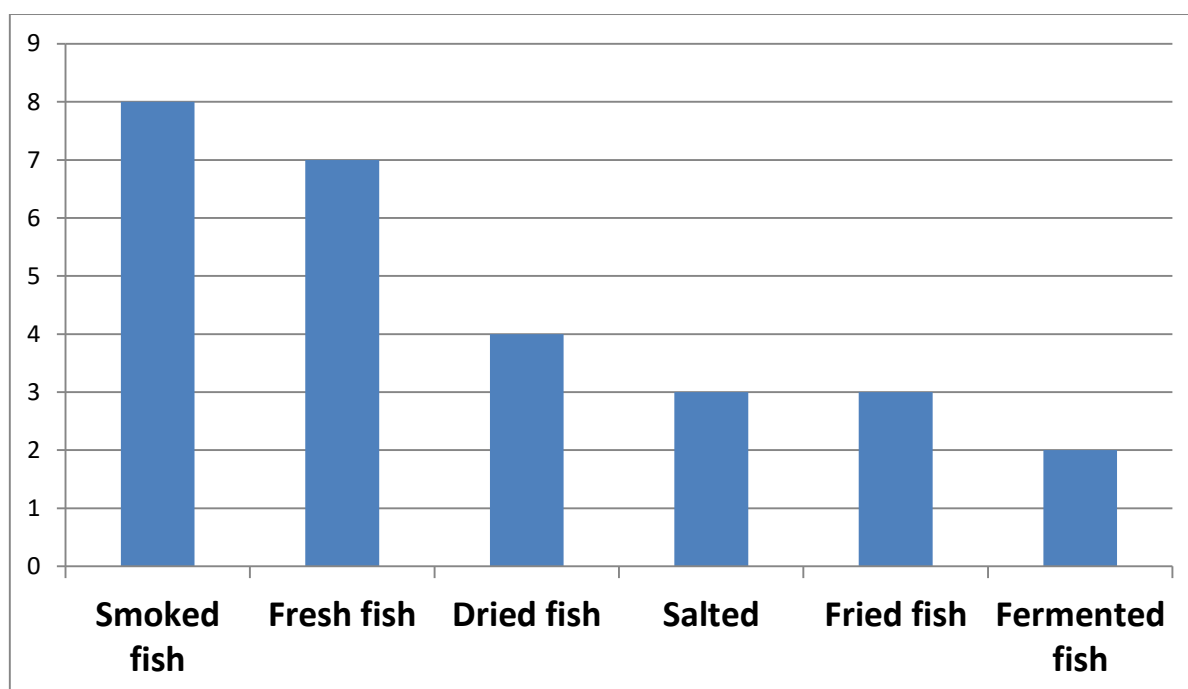


Figure 7 : forms of fish do you sell most per week?

3.3.4 Where do you get your fish from? (choose your most secured source).

Shop owners were asked where they procured their fish for sale in their shops. According to the survey, 6 of the 12 shop owners survey said they procured fish directly from fishermen.

Table 7: Where do you get your fish from

Value	Frequency	Percentage
Direct from fishermen	6	2.79
From traditional markets	3	1.4
Through a middleman	2	0.93
A fishery compliance facility	1	0.47

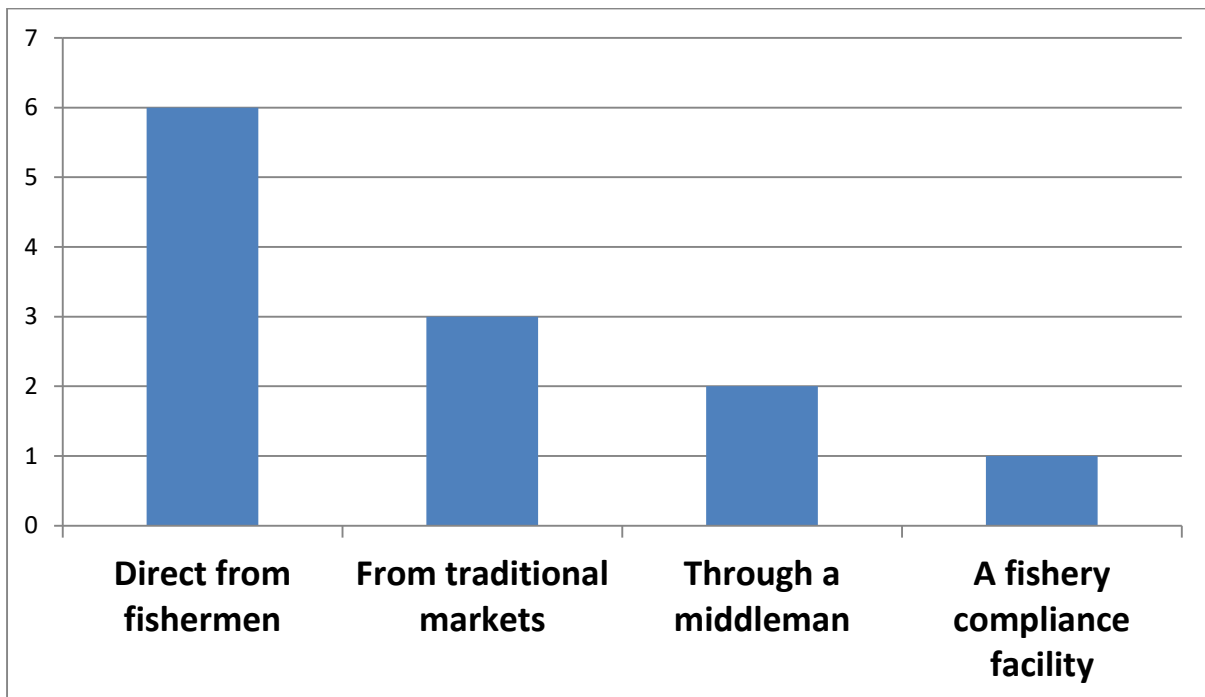


Figure 8: Where do you get your fish from

3.3.5 How often do you source fish from this outlet?

Respondents were asked how often they sourced fish from a fisherman, market, middle man or a compliant fish processing facility. 8 of those interviewed said they sourced fish weekly. Details are shown below;

Table 8 : How often do you source fish from this outlet

Value	Frequency	Percentage
Weekly	8	3.72
Daily	4	1.86

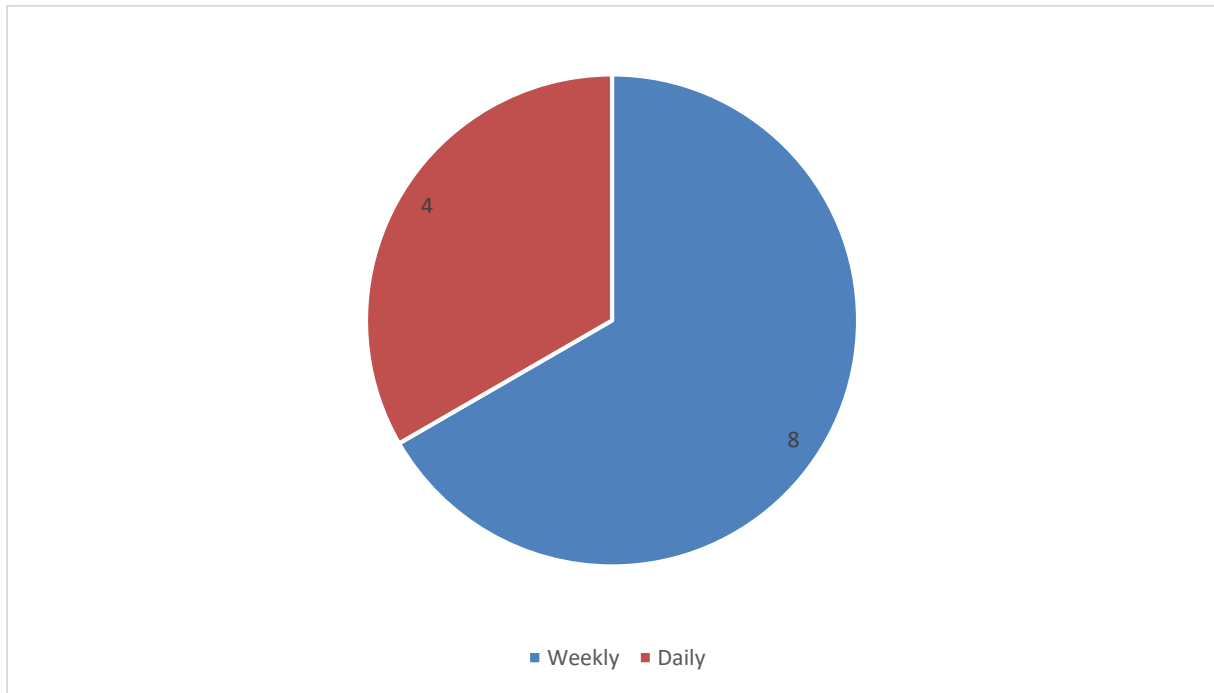


Figure 9: How often do you source fish from this outlet

**3.3.6 Which of the following fish stock do you have difficulty in obtaining?
(Select top 3)**

Among the various species available on the local market, respondents were asked the species most difficult to obtain from the sources. The most preferred species is the Barracuda while the least is Tilapia and Anchovies. The details are shown below.

Table 9: Which of the following fish stock do you have difficulty in obtaining?

Value	Frequency	Percentage
Barracuda (Edue)	8	3.72
Octopus (Kakadiamaa, Posra)	5	2.33
Crabs (Nhaa, Kaa)	4	1.86
Salmon	4	1.86
Cassava Fish (Nkan, Ekan)	4	1.86
Red fish	4	1.86
Shrimps (Sonn, Sesew)	3	1.4
Tuna	3	1.4
Sardine - Herrings (eban)	2	0.93
Anchovy (Keta School boys)	1	0.47
Tilapia	1	0.47

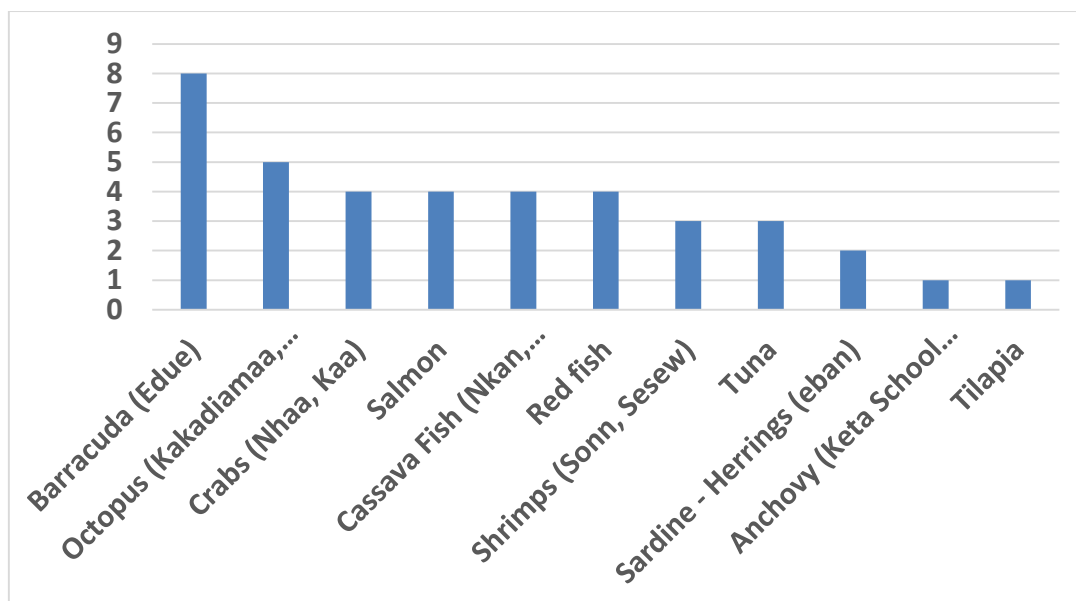


Figure 10: Which of the following fish stock do you have difficulty in obtaining

3.3.7 Which of the above named fish types do you normally pay higher price for? (Choose top 3).

Respondents were asked the fish type that attracts a higher price. The survey showed the price of sardines was lower than all the other species. The details are shown below;

Table 10: Which of the above named fish types do you normally pay higher price for

Value	Frequency	Percentage
Shrimps (Sonn, Sesew)	4	1.86
Barracuda (Edue)	4	1.86
Salmon	4	1.86
Octopus (Kakadiamaa, Posra)	4	1.86
Cassava Fish (Nkan, Ekan)	4	1.86
Tuna	3	1.4
Crabs (Nhaa, Kaa)	2	0.93
Tilapia	2	0.93
Red fish	2	0.93

Value	Frequency	Percentage
Sardine - Herrings (eban)	1	0.47
Other (Please Specify)	1	0.47

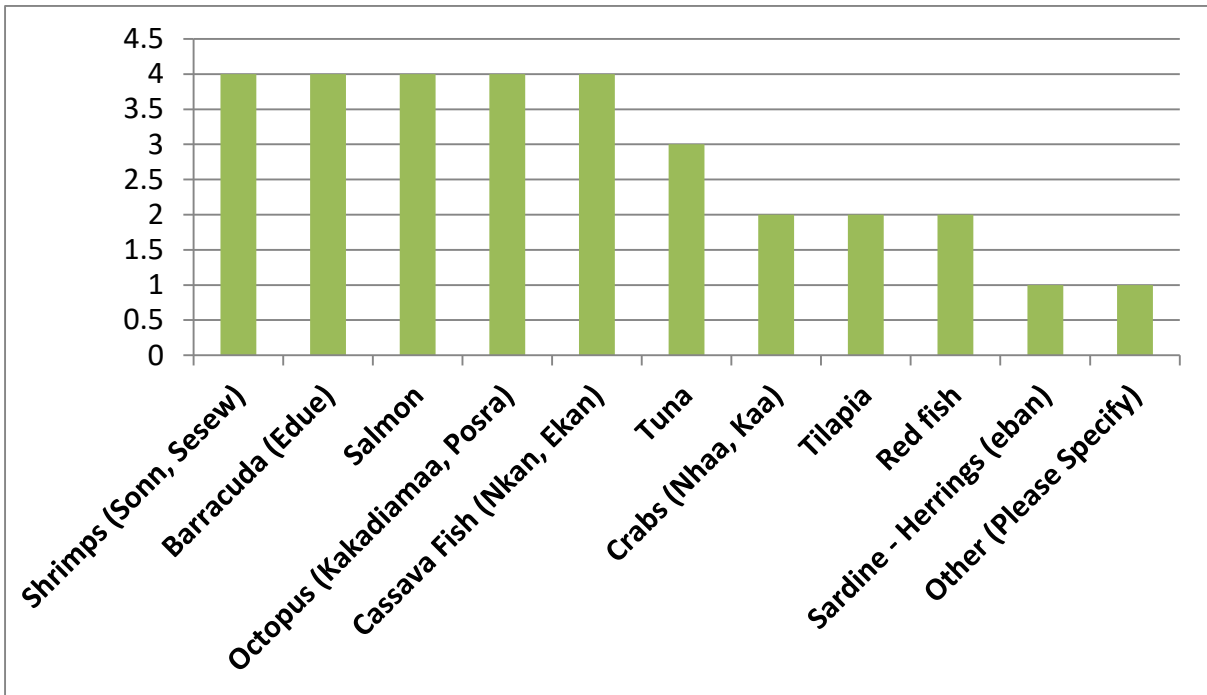


Figure 11: Which of the above named fish types do you normally pay higher price for

3.3.8 How do you prefer your fresh fish to be packaged before delivering, please indicate?

Table 11: How do you prefer your fresh fish to be packaged before delivering

Value	Frequency	Percentage
Wash it	2	0.93
Should be iced, stored in a cool place	1	0.47
Packaged nicely with ice block on it	1	0.47
Package In A Paper Box	1	0.47
N/A	1	0.47
In a box	1	0.47
Frozen in a bowl	1	0.47
The gutt should be reduced	1	0.47

3.3.9 Which of the following do you consider as very relevant when selecting source of fish supply? (Choose top 2).

Table 12: Which of the following do you consider as very relevant when selecting source of fish supply?

Value	Frequency	Percentage
Hygienic Condition	11	5.12
Cost of Fish	10	4.65
Packaging	2	0.93

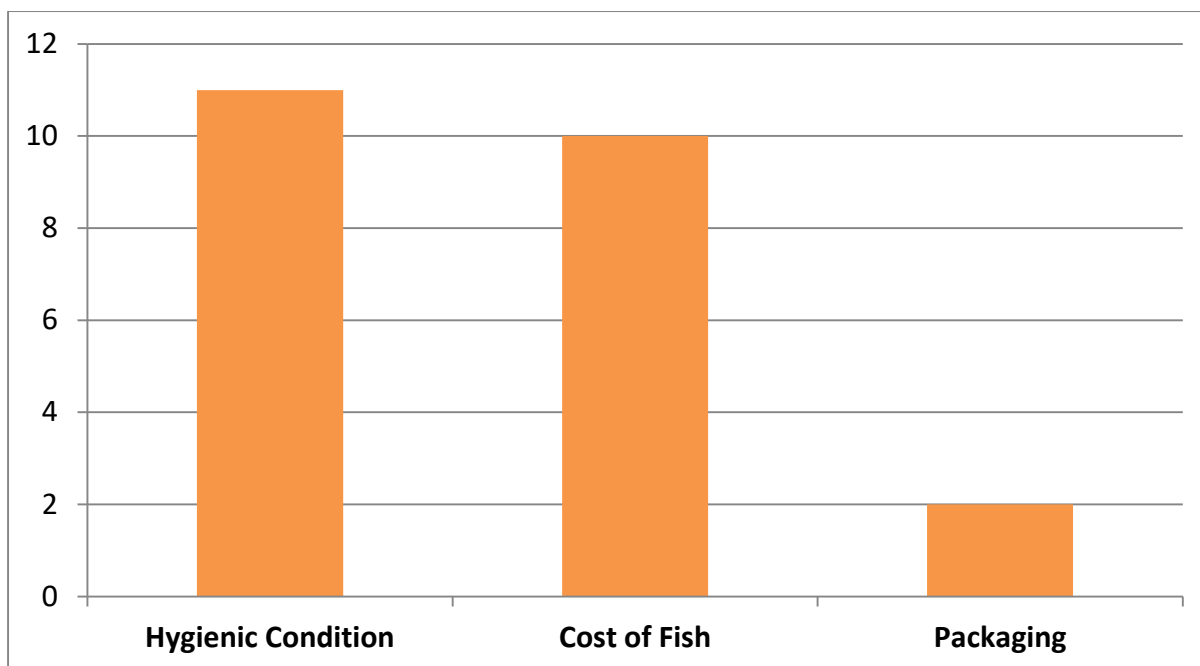


Figure 12: Which of the following do you consider as very relevant when selecting source of fish supply?

3.3.10 Are you aware of any illegal and unsafe fishing practices that can affect fish quality?

Table 13: Are you aware of any illegal and unsafe fishing practices that can affect fish quality

Value	Frequency	Percentage
Yes	6	2.79
No	5	2.33

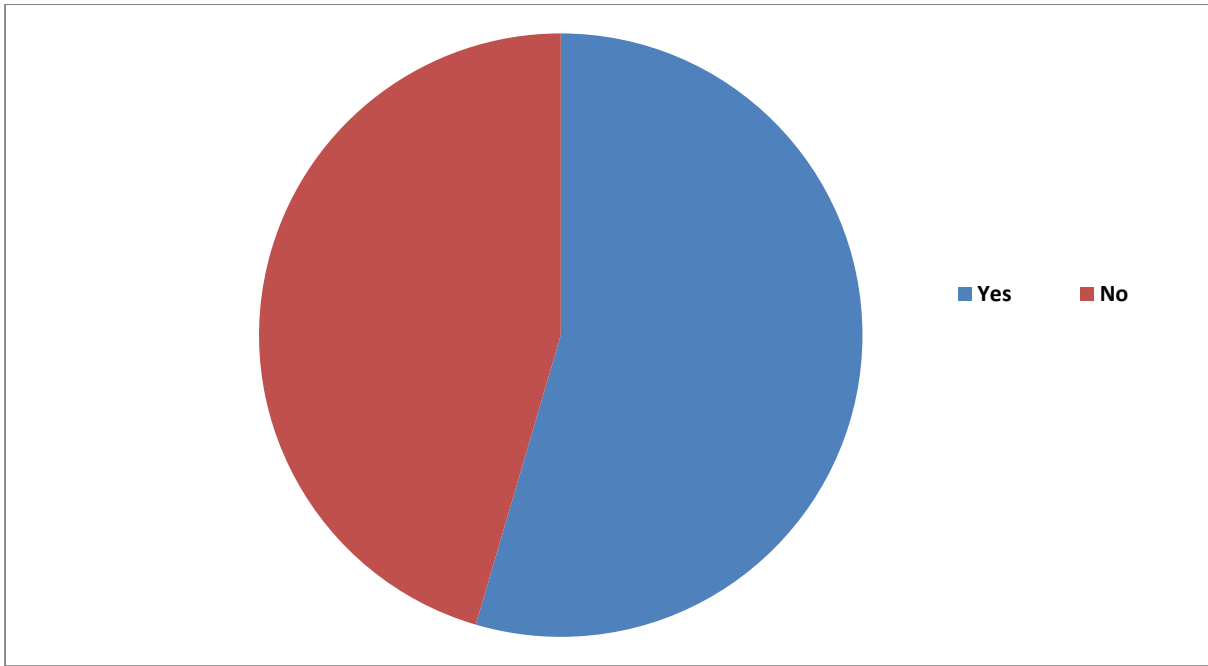


Figure 13: Are you aware of any illegal and unsafe fishing practices that can affect fish quality

3.3.11 Are you aware of any chemical contamination associated with smoked fish?

Table 14: Are you aware of any chemical contamination associated with smoked fish?

Value	Frequency	Percentage
No	12	5.58

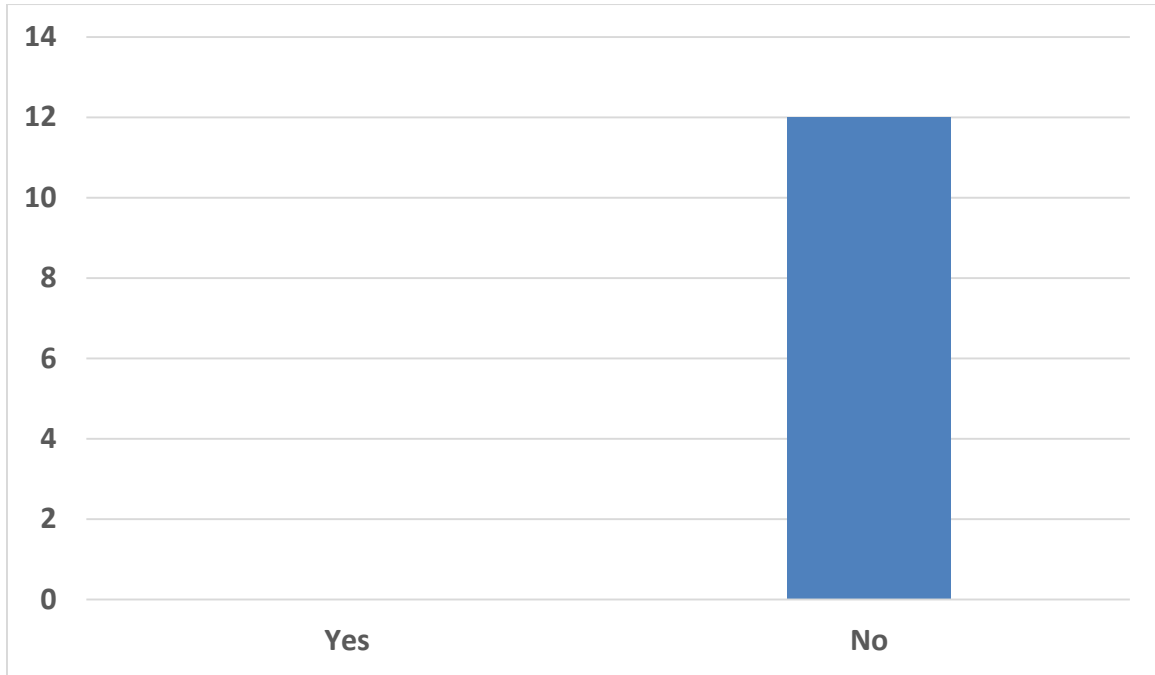


Figure 14: Are you aware of any chemical contamination associated with smoked fish?

3.3.12 If No, would you like to receive training/information on how do identify fish caught with chemicals and effects of unsafe fish products?

Table 15: people who would you like to receive training/information on how do

Value	Frequency	Percentage
Yes	10	4.65
No	2	0.93

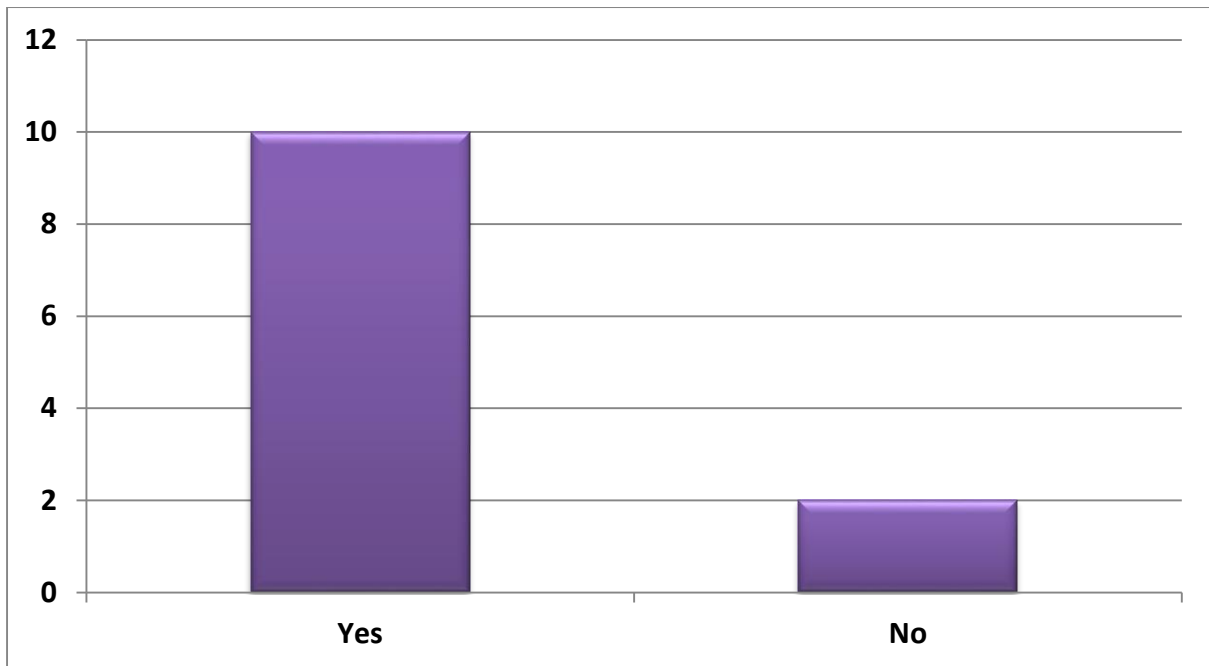


Figure 15: people who would you like to receive training/information on how do

3.3.13 Would you like to receive/buy fish from a Fishery Commission certified compliance facility?

Table 16: Would you like to receive/buy fish from a Fishery Commission certified compliance facility

Value	Frequency	Percentage
Yes	8	3.72
No	4	1.86

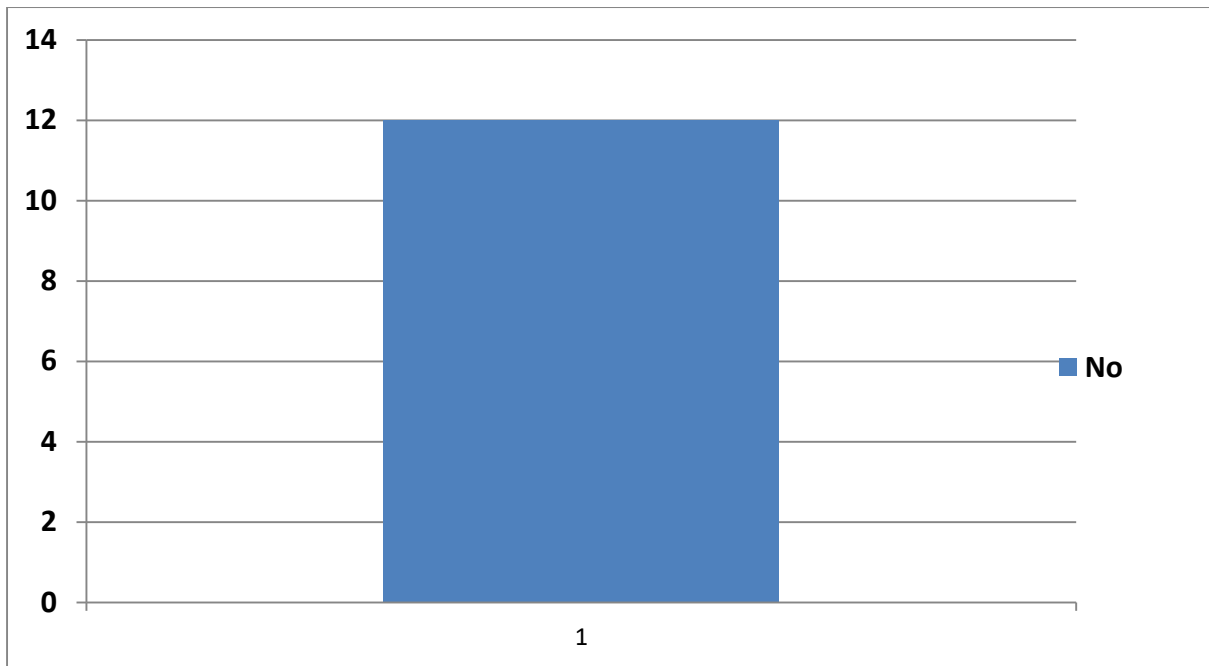


Figure 16: Would you like to receive/buy fish from a Fishery Commission certified compliance facility

3.3.14 Would you like to receive training in hygienic fish handling, preservation, identifying bad fish and storage?

Table 17: People who Would you like to receive training in hygienic fish handling, preservation, identifying bad fish and storage

Value	Frequency	Percentage
Yes	10	4.65
No	2	0.93

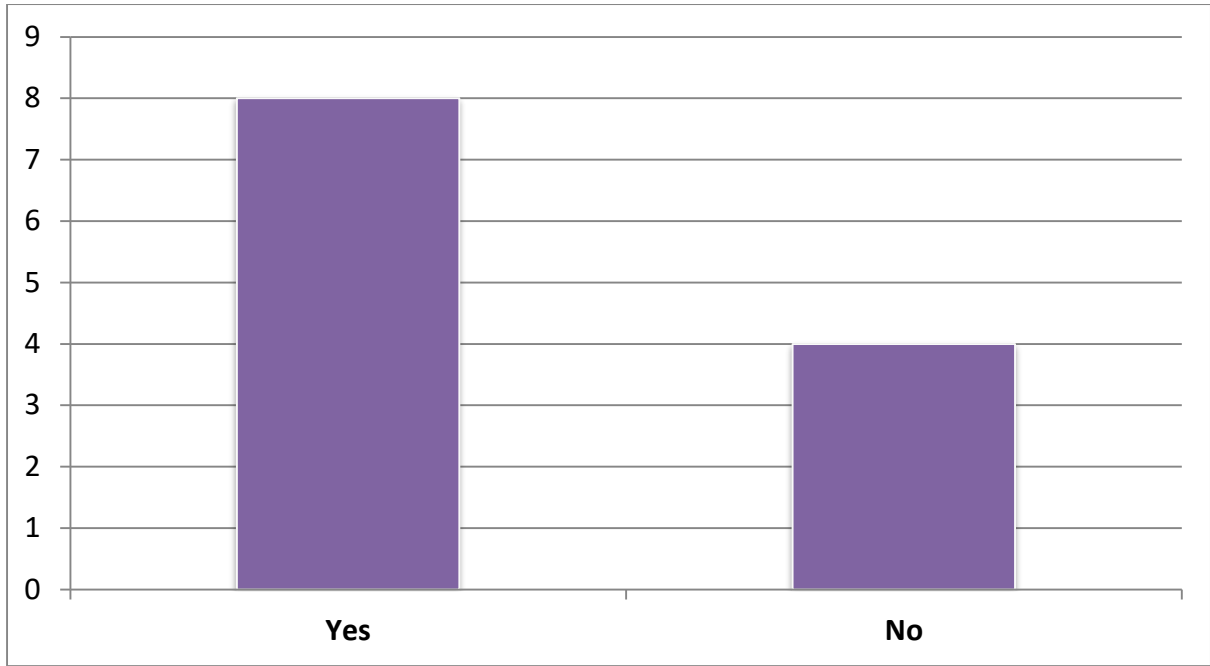


Figure 17: people who Would you like to receive training in hygienic fish handling, preservation, identifying bad fish and storage

3.3.15 Which of the following fish products would you like receive from a fishery compliance facility?

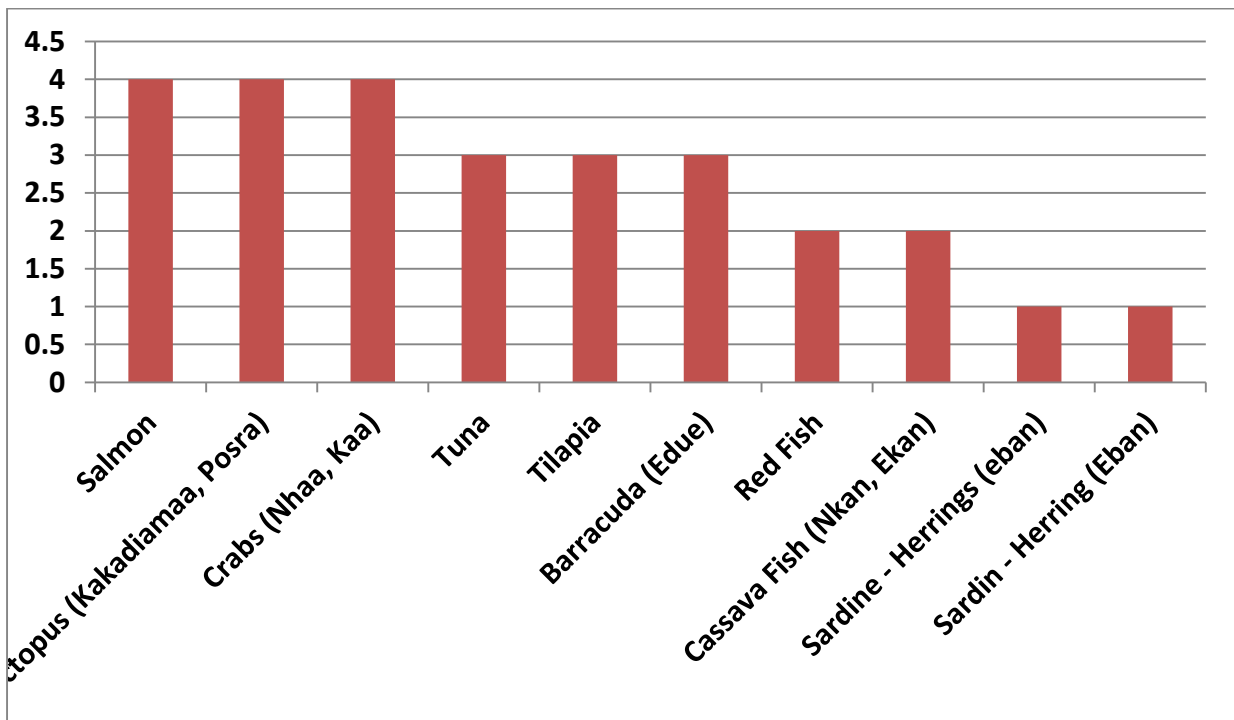


Figure 18: Which of the following fish products would you like receive from a fishery compliance facility?

3.4 Individual Consumers Results Analysis

3.4.1 Which of the following forms of fish do you use in your food preparation?

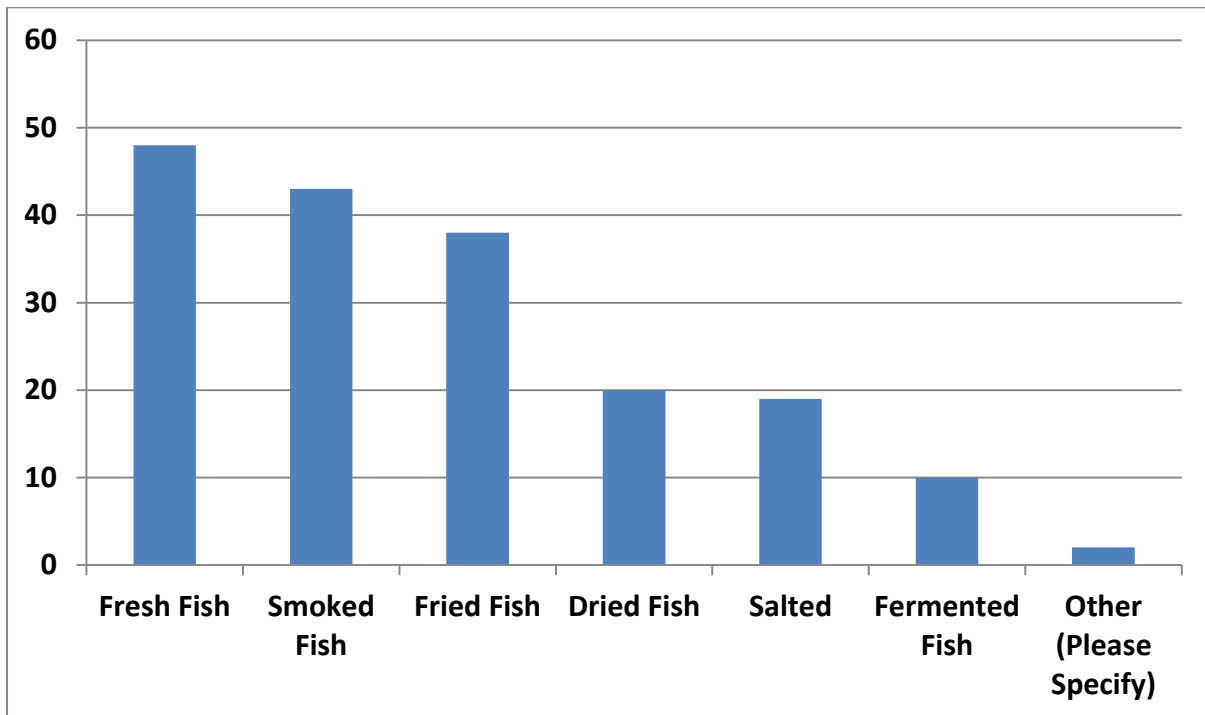


Figure 19: Which of the following forms of fish do you use in your food preparation?

3.4.2 Which of the following forms of fish do you use most in your food preparation?

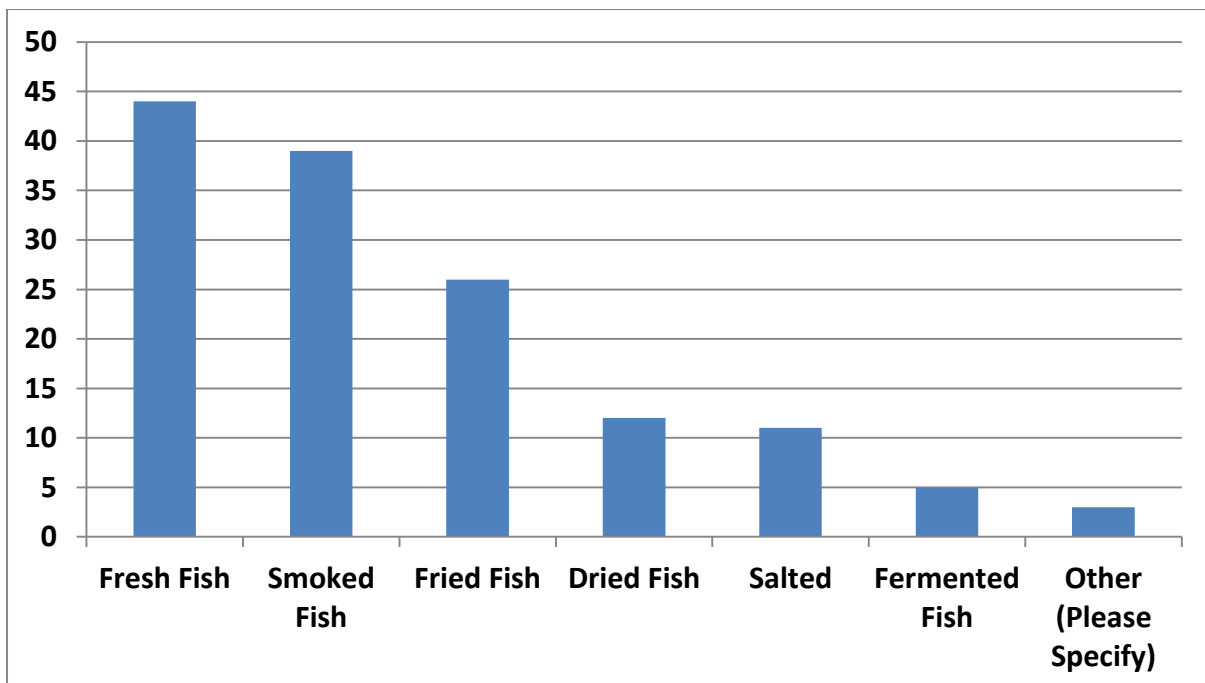


Figure 20: Which of the following forms of fish do you use most in your food preparation?

3.4.3 Which of the following fish species do you use often per week?

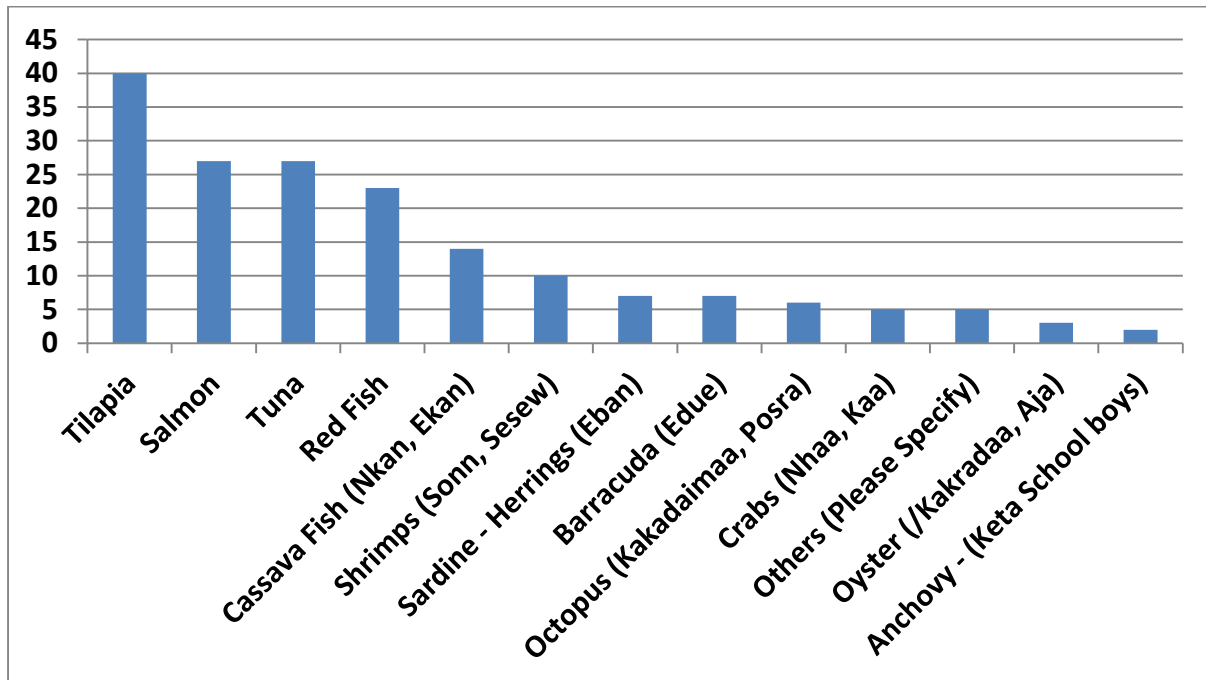


Figure 21: Which of the following fish species do you use often per week?

3.4.4 Where do you get your fish from?

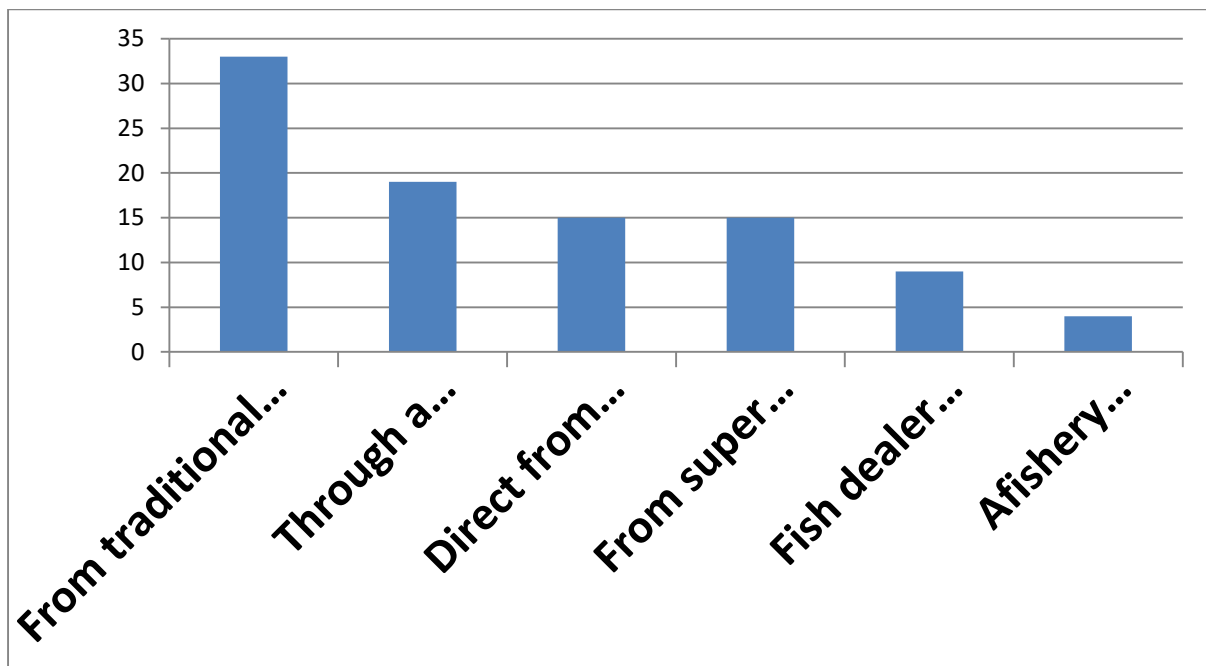


Figure 22: Where do you get your fish from?

3.4.5 Which of the following do you consider as very relevant when selecting source of fish?

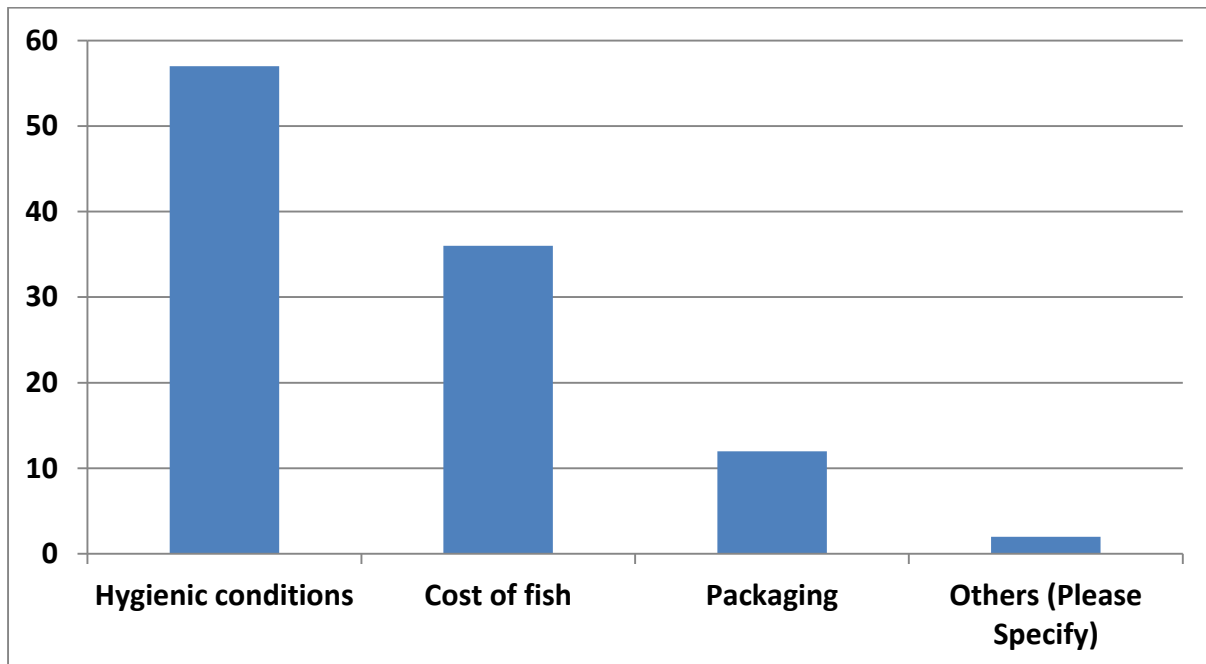


Figure 23: Which of the following do you consider as very relevant when selecting source of fish?

3.4.6 Which of the following fish products would you like to receive from a fishery compliance facility?

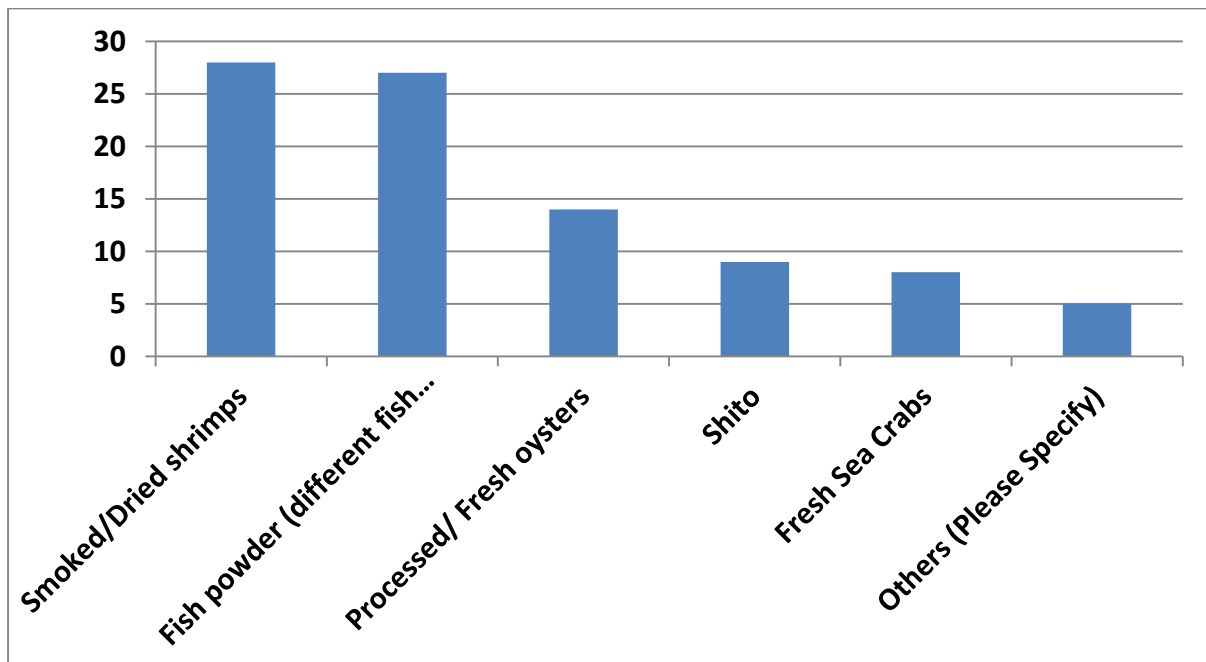


Figure 24: Which of the following fish products would you like to receive from a fishery compliance facility?

3.5 Hotels and Restaurants Results Analysis

3.5.1 How often do you source fish from this or these source(s)?

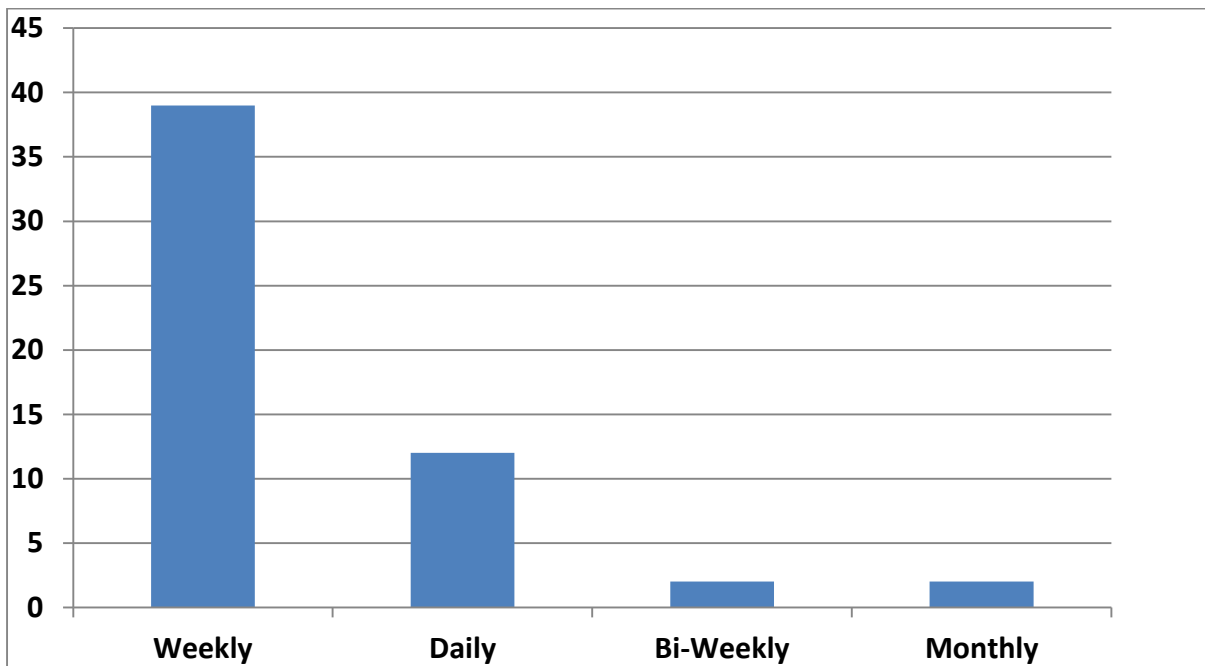


Figure 25: How often do you source fish from this or these source(s)?

3.5.2 Which of the following fish kind do you have difficulty in obtaining for food preparation?

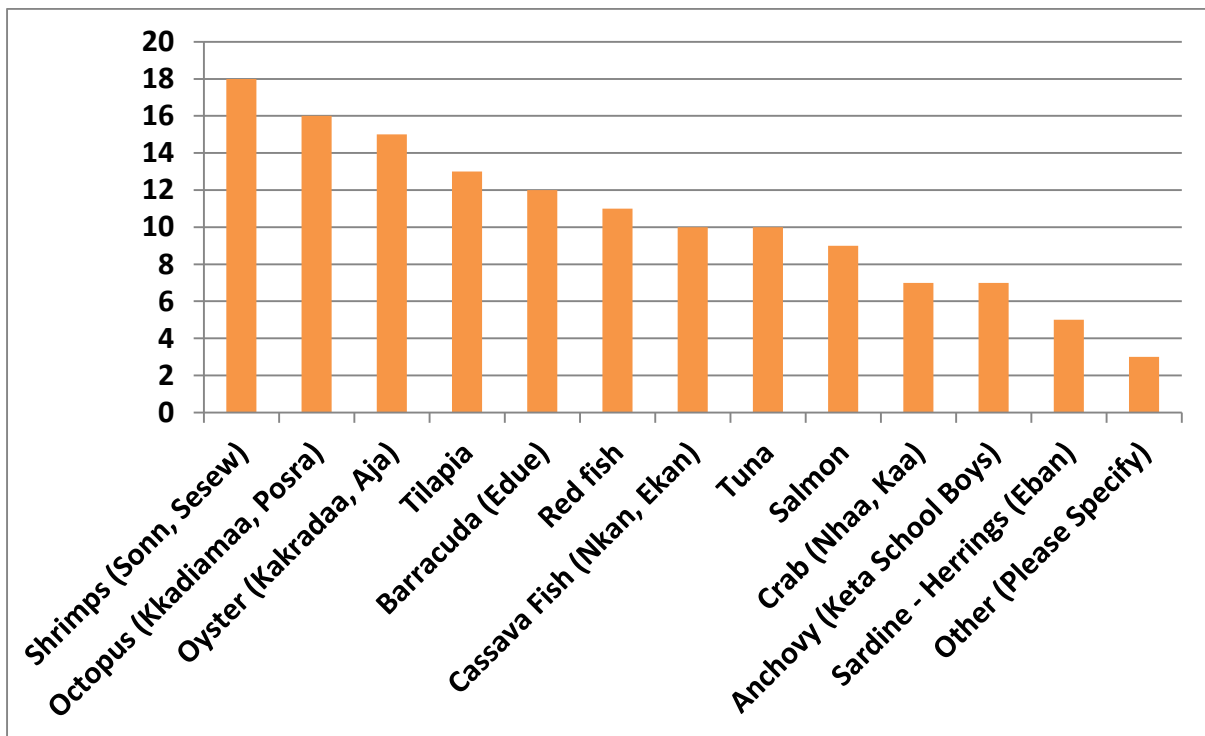


Figure 26: Which of the following fish kind do you have difficulty in obtaining for food preparation?

3.5.3 How do you prefer your fresh fish to be packaged before delivering to you?

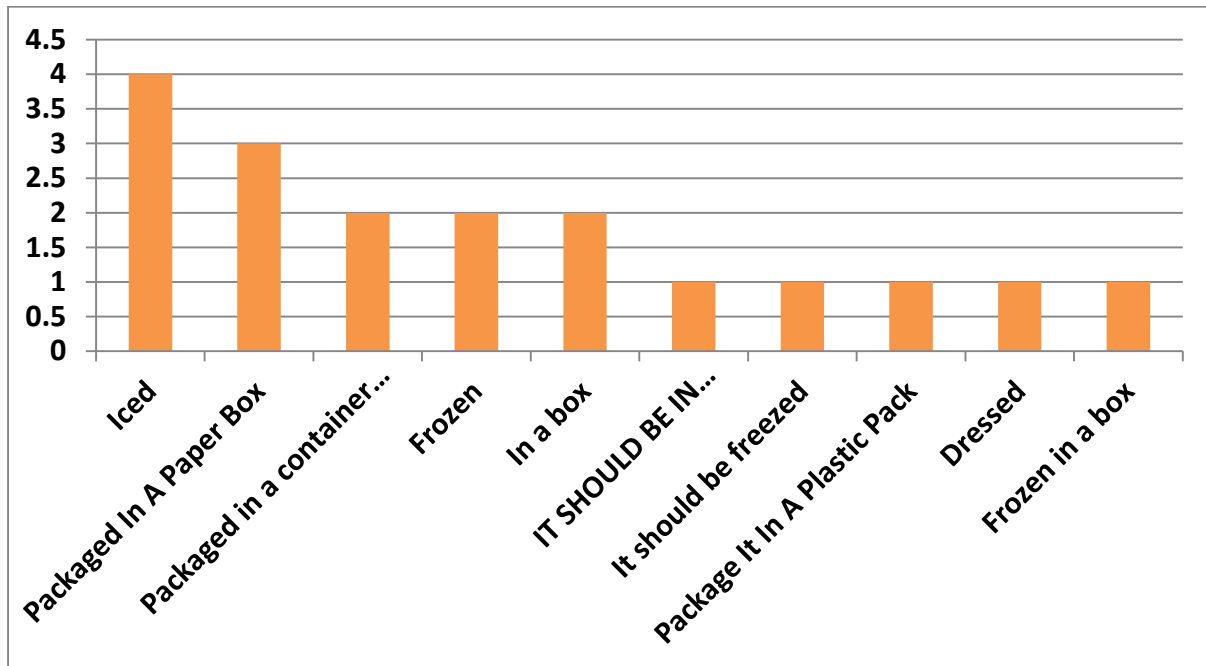


Figure 27: How do you prefer your fresh fish to be packaged before delivering to you?

3.5.4 Are you aware of any illegal and unsafe fishing practices that can affect fish quality?

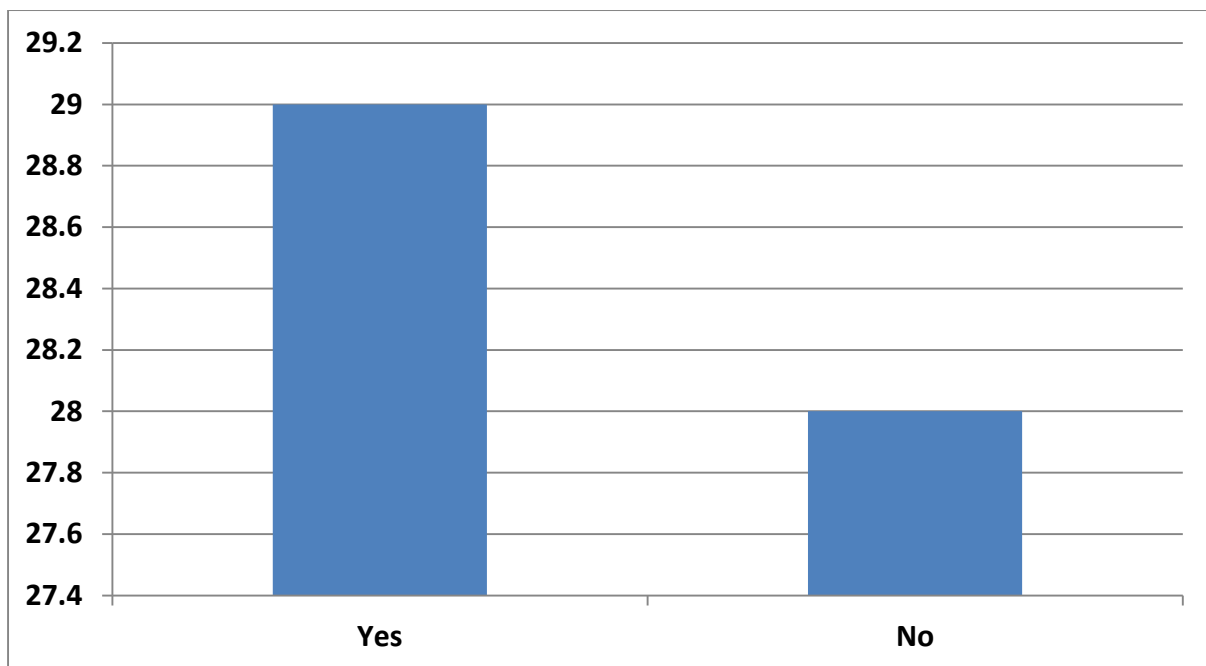


Figure 28: Are you aware of any illegal and unsafe fishing practices that can affect fish quality?

3.5.5 Are you aware of any chemical contamination associated with smoked fish?

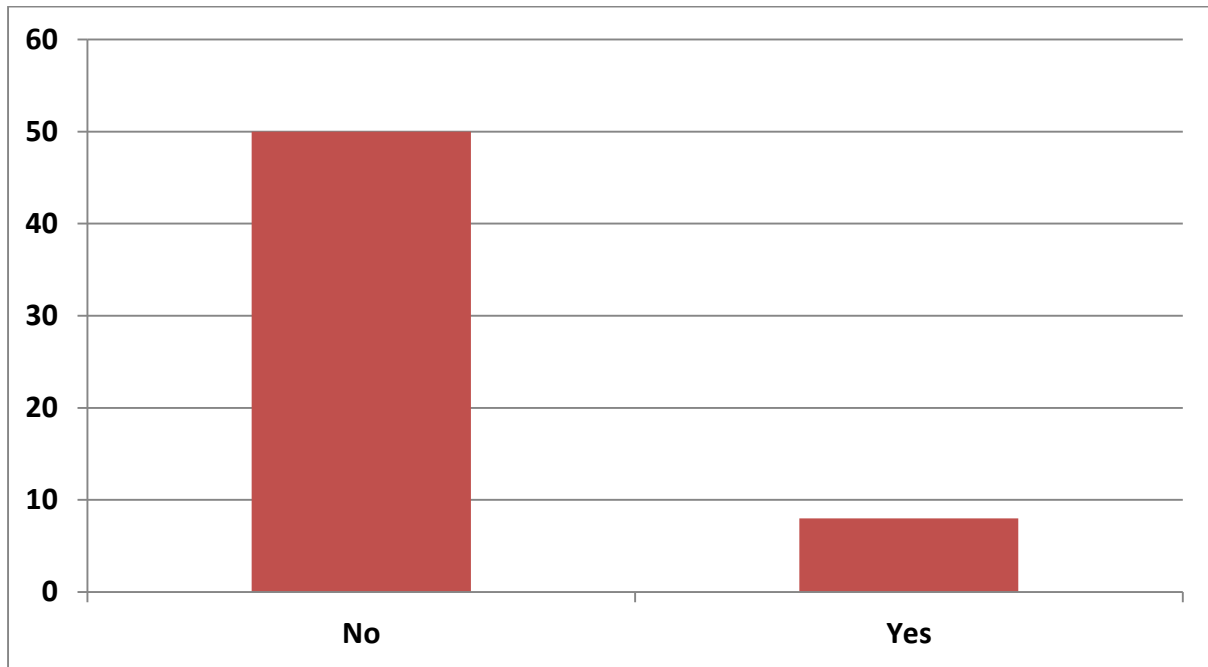


Figure 29: Are you aware of any chemical contamination associated with smoked fish?

3.5.6 Would you like to receive or buy fish from a Fishery Compliance and certified facility?

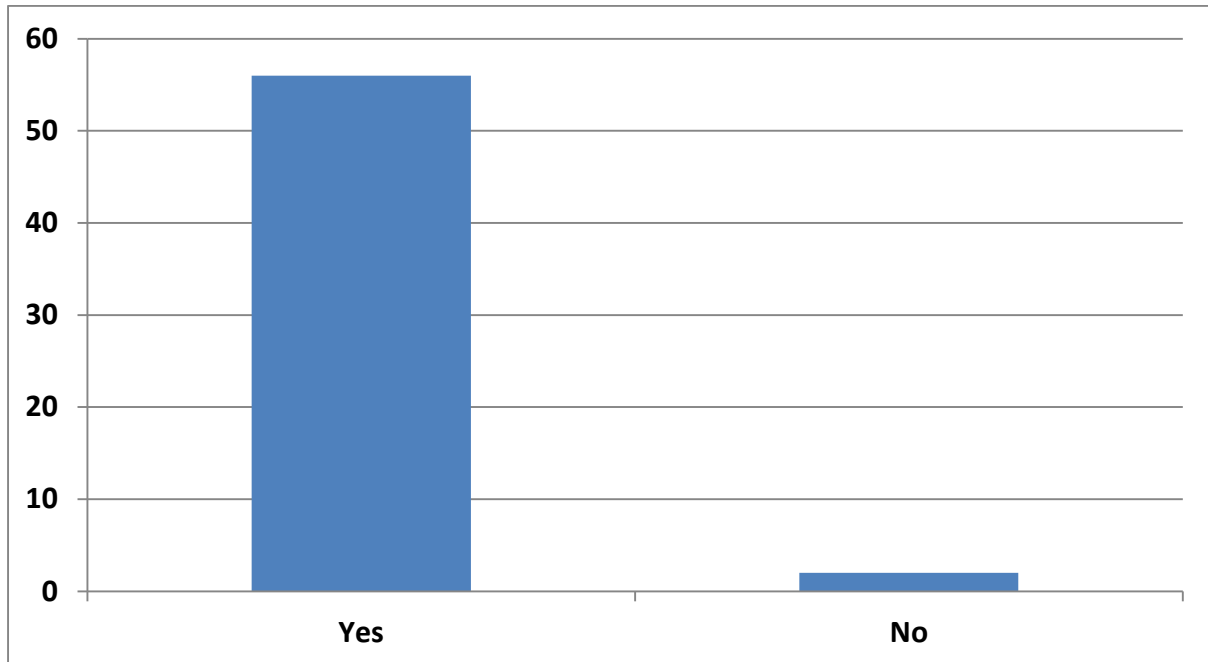


Figure 30: Would you like to receive or buy fish from a Fishery Compliance and certified facility?

3.5.7 Which of the following should be done to fresh fish before delivering to you?

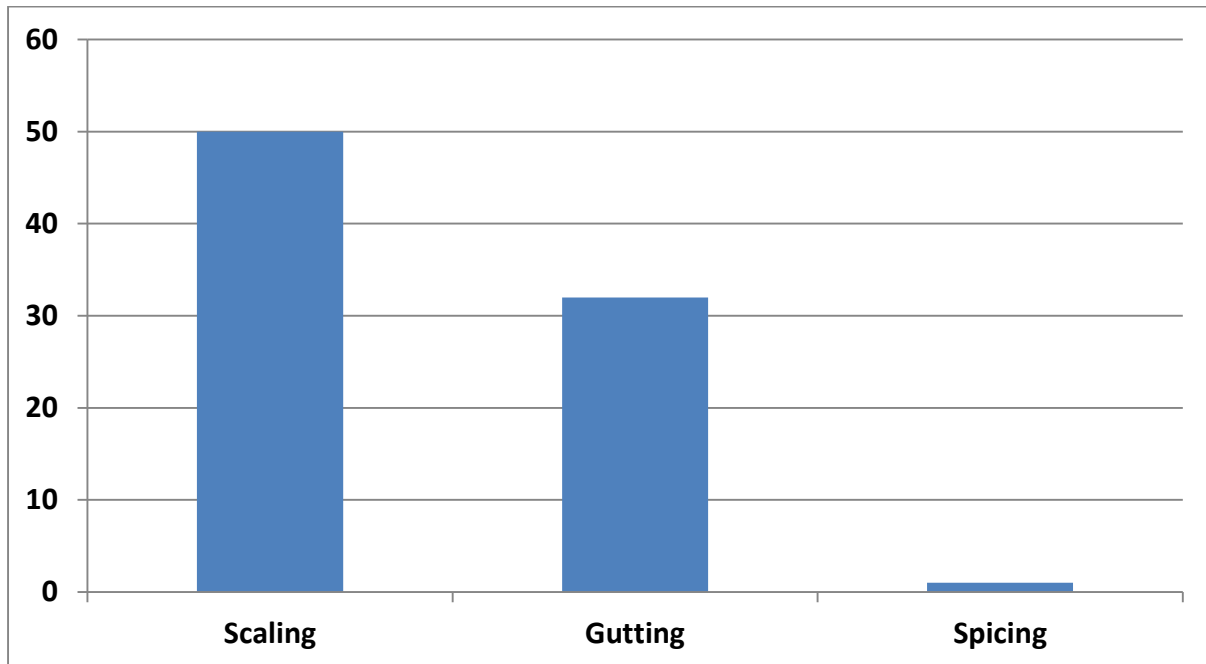


Figure 31: 7 Which of the following should be done to fresh fish before delivering to you?

3.5.8 Would you like to receive training in hygienic fish handling, preservation, identifying bad fish and fish storage?

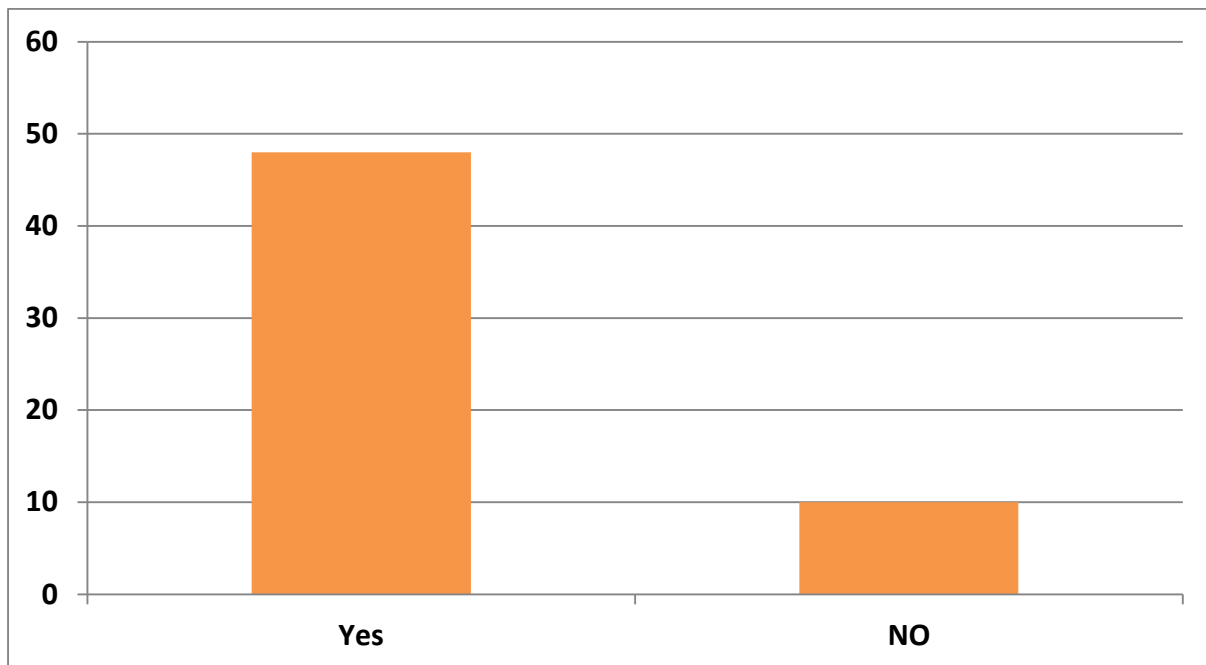


Figure 32: Would you like to receive training in hygienic fish handling, preservation, identifying bad fish and fish storage?

4.0 CONCLUSION

4.1 Key Outcomes

- There is a high Demand for locally harvested hygienically processed Fish
- All consumer categories would like to receive fish supply (both fresh and processed) from an accredited source.
- Almost all of the respondents are aware of chemical contaminations in processed fish.
- Consumers rate hygiene issues associated with fish processing higher than the cost of fish.

5.0 APPENDIX

5.1 Locations and Contacts of Respondents

No	Market Place	Location/ Land mark	Contact Name/Num ber	Special Notes
	Hotels/ Restaurant (30)			
1	Mama Lit Restaurant	Madina Old Road , near social welfare	Patrick – 023215085 9/ 024418168 5/ 027547513 4	Will fill for her restaurant and DeYoungsters school
2.	Movenpick Hotel Judith.kugbadzor@movenpick.com	Judith Kugbadzor Assist. Purchasing manager	020433314 4	Needs soft copy Judith.kugbadzor@mov enpick.com
3	Accra City Hotel	Accra, opposite accra polytechnic		
4	Jasmine Lebanese Cuisine	Airport, Near the Holiday Inn	Akua	
5	La Tante DC 10 Restaurant	Airport, Opposite Holiday Inn		
6	Paloma Hotel, Circle	Philomina, Ring road to circle	philomina	Procurement / sales officer
7	Fiesta Royale Hotel	Dzorwulu Junction	Anthony Sales & procuremen t officer	Please come on Thursday between 8 am – 11am .
8	African Regency Hotel	Spanner Junction Madina Accra Road		
9	Ampomah Hotel- East Legon	American house, east legon area	Richard Danso	ampomaahgh@yahoo.com marketing books

N o	Market Place	Location/ Land mark	Contact Name/Num ber	Special Notes
			057700000 8	
1 0	Holiday Inn	Airport area	Ramatou	
1 1	Golden Tulip Hotel			
1 2	Kempisky Hotel	Near Ridge Church		
1 3	Tigress Restaurant	Old Barrier near Prudential Bank	024278353 8	
1 4	Las Palmas – Abeka	Head office		
1 5	Italian Fish Restaurant	Osu – Down Papaye	054095786 2 020292349 7	Needs soft copy salvodaleo@yahoo.it
1 6	Asanaka Local Restaurant	Osu – Down Papaye	Ms Juliana Opare	
1 7	Tawa Kul Tu Allah Lahii	Old Barrier	024284433 7	
1 8	Ridma Hotel and Restaurant	McCarthy Hill, Maalam- Kasoa Road	Joseph Mensah	Mensahjoseph425@gmail.com
1 9	SIZZLER Restaurant	Near Choice		
2 0	MENSVICK Grand Hotel	East Legon Near Body talk		
	SUPERMARKETS (10)			
1	Tawa Kul Tu Allah			
2	Salty Water Fish Market	Osu – Photo Club		Saturday Morning
3.	Max Mart Super Market	37 near DVLA		

N o	Market Place	Location/ Land mark	Contact Name/Num ber	Special Notes
4	SHOPRITE	Accra Mall		
5	Shop n Save	Spintex Road near Papaye		
	Academic Institutions (10)			
1	The Light Academy	Adenta near the Adenta Mall	Dr. Daniel Ayitiah 020816024 7	
2	Tot to Teen	Adenta SDA Junction		
3	West Hill School	Behind West Hill Mall	Frances 020004204 78	France.cato@westhill-school.com
	Individual Consumer Corporate (100)			
1	Prudential Bank	Weija – Old Barrier on Kasoa Road	Mr. Opoku- Boadu 0208 364 555	
2	Ecobank (12 people)	Weija – Old Barrier on Kasoa Road		
3	NIB	Weija – Old Barrier on Kasoa Road	Emmanuel Essuman 0244 226 424	
4	Omni Bank (10 people)	Weija – Old Barrier on Kasoa Road	Harriet Amankwaa 0501 571 833	
	Individual Consumer Random (100)			
	Taxi Ranks			
	Market places			

No	Market Place	Location/ Land mark	Contact Name/Num ber	Special Notes
	Environmental Health – Ga South	Weija Municipal Assembly	020843684 0	
	G.E.S – Ga South	Weija Municipal Assembly		
	M.O.F.A – Ga South	Weija Municipal Assembly		