LEBANON AGRI-FOOD INITIATIVES

MAPPING AND GAP IDENTIFICATION

NOVEMBER 2021

Lebanon Agri-food Initiatives Mapping and Gap Identification

November 2021

This report was developed through funding from Hanns Seidel Foundation (HSS), by the team of the Lebanon Reforestation Initiative with the support of local experts.

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About Hanns Seidel Foundation

The Hanns Seidel Foundation is one of the six official political foundations of the Federal Republic of Germany. Established in 1967, the HSS today is serving Democracy, Peace and Development in more than 75 countries around the globe. Named after the former Minister President of the Free State of Bavaria and Chairman of the Christian Social Union, Dr. Hanns Seidel, the HSS' specialist departments operate in the fields of political consulting and education, scholarship programmes and development cooperation. Operations in Lebanon have been ongoing since 1998, focusing on environmental sustainability, civic education and empowerment in a decentralized approach.

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Contents

List of Abbreviations

COVID19	Coronavirus disease of 2019
CREAL	Center for Research on Educational Access and Leadership
EIIP	Employment-Intensive Investment Program
ERP	Emergency Response Plan
FAO	Food and Agricultural Organization of the United Nations
GDP	Gross Domestic Product
HSS	Hanns Seidel Foundation
INGO	International Non-Governmental Organization
LCRP	Lebanon Crisis Response Plan
LINQ	Lebanon Investment in Quality
LIVCD	Lebanon Industry Value Chain Development
MFI	Micro-Finance Institutions
MSME	Micro, Small and Medium Enterprises
NGO	Non-Governmental Organization
RMF	Rene Moawad Foundation
SME	Small and Medium Enterprises
SMEB	Survival Minimum Expenditure Basket
UNHCR	United Nations High Commissioner for Refugees
USD	United States Dollar

List of Tables

List of Figures

Agriculture and agri-food sector in Lebanon in 2021

Following a series of crises, starting from the fires and the uprising in 2019, followed by the COVID19 pandemic, aggravating an already incipient economic crisis, to the Beirut Blast and the serious fuel shortage, Lebanon is currently suffering an unprecedented economy collapse and an unstable and threatening political situation. The country is now classified by the FAO under 'Countries requiring external assistance for food', and according to the World Bank, Lebanon's crisis ranks in the top 10 most severe crises episodes of the mid-nineteenth century.

Lebanon's national currency value dropped by 90% between 2019 and 2021, unemployment rates rose from 11.4% in 2019 to over 40%, with youth unemployment rates reaching more than 60%. As unemployment rates and inflation continue to soar, so does poverty; the debt level of residents of Lebanon has increased and food was the top reason for money borrowing. By the start of 2021, food insecurity rates reached 20% for Lebanese, 50% for Syrian refugees, and 33% for refugees of other nationalities. The SMEB (survival minimum expenditure basket) registered an increase of 340% by May 2021[1]. Food prices have soared to unprecedented levels, threatening the variety and nutritional richness of meals for families residing in Lebanon. As of October 2021, Lebanon NGOs and International NGOs have appealed to global donors requesting 115 Million USD to answer the food security needs of 1.4 Million people living in Lebanon[2].

Furthermore, Lebanon was highly impacted by the 2011 Syrian war. The country currently hosts the largest relative number of refugees in the world, with Syrian refugees making up more than 20% of the population. The high influx of Syrian refugees created pressure on natural resources and competition over daily labour. The war directly affected the agricultural sector[3] and its value chains as it cut export routes; it also cut channels that had allowed Syria's subsidized agricultural inputs to benefit Lebanon's agricultural production. Moreover, the collapse of the Syrian animal health system during the war led to outbreaks of diseases reaching Lebanon's livestock (especially ruminants) through trans-boundary movements.

In 2019, the year of Lebanon's uprising, the country's financial model that depended heavily on foreign investments and that had a 'low-productivity' economy, crumbled. The agri-food sector was affected as access to financing throughout the value chain became extremely complicated. Banks could no longer accommodate the need for retail, middle market, corporate or even farmers (in much lesser extent) for traditional loans (e.g. Kafalat)[4]. In addition, microfinance institutions (MFI) that used to cater for small productive projects have been reduced by around

[1] WFP, 2021. Lebanon country profile.

[2] Lebanon Emergency Response Plan 2021 | Financial Tracking Service (unocha.org)

[3] FAO, 2021. Lebanon at a glance.

[4] USAID, 2020. Financing Lebanon's Agro-Food Sector: An Analysis of The Sector Before And After October 2019. Report by Economic Development Solutions (EDS).

40% since 2019[5]. The credit-based purchase from input suppliers (e.g. RobinsonAgri, Debbane and Unifert) was no longer an option as suppliers did not want to risk losing from depreciation. Payments after 2019 would only be settled in cash transfer, which has not only affected internal transactions, but also disturbed the import of goods which makes up to 90% of the agri-food sector needs throughout its different value chains.

On the 4th of August 2020, the Beirut Port explosion, and its aftermath, drained Lebanon further from resources and capabilities and destroyed its main import and export channel as well as the country's silos that used to hold 120,000 tons of grains[6]. In parallel, the COVID-19 pandemic that brought economic life to a halt, had been causing losses in jobs and revenues, especially for small and medium enterprises. Food supply chains were generally disrupted, and production, availability, and access to food were heavily impacted. According to CREAL[7], plant production values were expected to decrease by 47% in 2020 compared to 2018, whereas animal production values were expected to decrease by 26%. The total Lebanese Agriculture Production values were expected to decrease by 38% with most affected crops being ones that are very commonly used in Lebanese cuisine like cereals, onions, and potatoes.

Despite the abovementioned crises, and despite the agricultural sector's small share[8] in Lebanese economy, agriculture still provides income to families and contributes to the food security of many people. Also, the sector still indirectly contributes to national growth through its agri-food industry and processing activities. The sector is also intertwined with the forestry sector as foods and processed goods from the forest generate between 80 to 97 Million USD in sales every year and create income for around 15,000 rural households. The agri-food sector is a major and growing employer and greatly contributes to the local economy in local rural areas, sometimes reaching 80% of local GDP.

As Lebanon still enjoys a favourable climate for agricultural diversity and is also rich with a variety of naturally occurring forest food products, the agri-food sector can benefit from support throughout its different value chains to ensure better food security and income from export. The system changes and current challenges could be a doorway to rebuild the agricultural system on modern and sustainable grounds. Rural tourism also presents an opportunity that can largely benefit the agri-food sector. Recent studies have shown that with the COVID19 restrictions on travel, local tourism has boomed, leading to increasing demand for a diversity of local tourism

[5] See USAID (2020). Lebanon has 9 MFIs within a network called the Lebanese Microfinance Association (LMFA) created through USAID support, some are NGOs, some are registered with the Central Bank and one is a COOP. Despite MFIs having invested little in agriculture, they played an important role in filling the gap for small loan needs and have a quick and relatively easy application process. MFIs have served households that have taken out loans to use in farming activities and have been used in the food processing and catering value chains.

[6] FAO, 2021. GIEWS - Global Information and Early Warning System Country Brief on Lebanon. Reference dare: 02-December-2020. FAO GIEWS Country Brief on Lebanon -

[7] Diagnosis of the Lebanese agriculture in light of the latest financial crisis: Impact on 2019–20 agricultural campaign by Riad Fouad Saade. AUB. CREAL plant production estimates calculate the average for what includes: field crops, fruit trees, industrial crops, vegetables and flowers, forest products and prohibited crops; and their animal production value calculated it for poultry, dairy, meat, fisheries and apiculture.

[8] Agricultural sector contributes less than 5% of the Lebanese economy while the manufacturing sector contributes less than 10%, compared to the service sector that contributed to more than 60% to the national GDP since 2004.

packages, especially in rural areas. Citizens able to afford travel have been heading towards more remote areas where they can enjoy pristine natural landscapes, fresh and clean air, and experience in the same time new culinary and lifestyle options. This opened the door for many small and family-owned agri-food businesses in rural areas to develop through rural tourism income.

This study was developed under the framework of the project funded by Hanns Seidel Foundation and implemented by the Lebanon Reforestation Initiative entitled "Sustainable Business Opportunities in The Agri-Food Sectors in Lebanon", with the aim of better understanding current support provided to the sector, emerging sector needs and gaps in support that would guide decision-making of donors for further interventions.

The project mapped the existing and planned interventions in the agricultural and agri-food sector in Lebanon to the extent data was available and shared. Although some interventions might not have been captured in this report, the data provided allowed for a clear general overview of the situation that can support further planning for the sector. As such, this report presents the research findings and lists intervention recommendations by *sub-sector, by location* and *by beneficiary type.*

Methodology

As this report aimed at mapping interventions of international donors and local NGOs in the agri-food sector, data collection focused on three main channels:

- Desk research of project's web-platforms and analysis of data from the LCRP inter-sector database;
- Data collection on a shared matrix with specific data points requested, shared by email with key actors in the sector;
- Interviews with local experts.

Data was compiled on the shared matrix (available in Annex 1 to this report) and analyzed to the extent possible to identify gaps by type of beneficiaries, geographical locations, and types of interventions. Data lumping and lack of disaggregated data posed in some cases challenges to conduct a more detailed analysis. Estimations and assumptions were adopted to mainstream data and disaggregate to the extent feasible without affecting data integrity and quality.

Summary of Findings

Current active donors and interventions in the agri-food sectors

The mapping of agri-food sector related funds allowed tracing a total of 58 projects or programs supporting farmers and the agricultural sector in general. Of the total, 6 projects/programs are completed as of September 2021, two are planned, two are at their inception phase and 48 are ongoing. Figure 1 below provides an overview of the distribution of these 58 initiatives over 4 general sectors, namely agriculture, environment, forestry and fisheries.

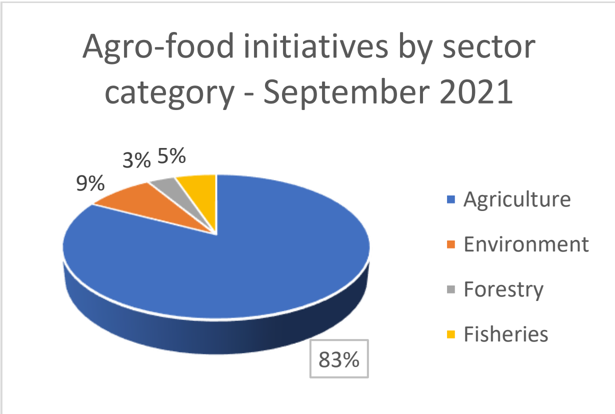

Figure 1. distribution of projects assessed by sector categories

Within those four sector categories, sub-sector distribution was defined to the extent data segregation allowed for such division. Table 1 below shows the number of projects for each sub-sector, determined by the overarching sub-sector for each project as defined by project objectives and data provided by the organizations contacted. Overall, the majority of initiatives under agriculture (27%) are geared towards supporting livelihoods of farming communities, either through cash for work approaches or support for small and medium businesses. Projects specifically designed to support agricultural value chains and business development accounted to 25% of the total, while 15% supported technical cooperation, and the remaining ones were divided between sustainable agricultural practices, food security, animal production, teaching and others.

Table 1. Division of the 58 assessed projects/programs by sub-sector

<table>
<tr><th>Sector</th><th>Nb of projects</th><th>Sub-sector</th><th>Nb of Projects</th></tr>
<tr><td rowspan="11">Agriculture</td><td rowspan="11">48</td><td>Animal production</td><td>2</td></tr>
<tr><td>Food security</td><td>2</td></tr>
<tr><td>Gender mainstreaming in agriculture</td><td>1</td></tr>
<tr><td>Good agricultural practices</td><td>4</td></tr>
<tr><td>Greenhouse production</td><td>1</td></tr>
<tr><td>Landscape management</td><td>1</td></tr>
<tr><td>Livelihood support</td><td>13</td></tr>
<tr><td>Sustainable agriculture</td><td>3</td></tr>
<tr><td>Teaching</td><td>2</td></tr>
<tr><td>Technical cooperation</td><td>7</td></tr>
<tr><td>Value chain / Business Development</td><td>12</td></tr>
<tr><td rowspan="2">Environment</td><td rowspan="2">5</td><td>Hazardous waste disposal of pesticides</td><td>1</td></tr>
<tr><td>Water management</td><td>4</td></tr>
<tr><td rowspan="2">Fisheries</td><td rowspan="2">3</td><td>Communication</td><td>1</td></tr>
<tr><td>Research</td><td>2</td></tr>
<tr><td>Forestry</td><td>2</td><td>Landscape restoration</td><td>2</td></tr>
</table>

Active donors and financial overview

Current support for the agricultural sector is received through two main channels. The first includes multilateral funding sources, mostly through United Nations agencies operating in the country, such as the Food and Agricultural Organization (FAO), the United Nations Development Program (UNDP), the World Food Program (WFP), the International Labour Organization (ILO), or through the World Bank (WB) and the European Union (EU). In parallel, bilateral support for the sector is provided by several countries including, but not limited to, France, Italy, Germany, USA and Holland, that have been supporting the sector through their respective international development programs and Embassy projects. Support is being channelled through either International NGOs (INGOs) or local NGOs or social enterprises working either on a national or regional level. Projects and programs are implemented by those entities in coordination with the local relevant ministries, mostly the Lebanese Ministry of Agriculture but also for some projects the Ministry of Environment or the Ministry of Energy and Water, and in close collaboration with the municipalities. However, as explained in the interviews, funding is usually managed by the international agencies and NGOs without passing directly through the government to avoid administrative burdens and potential delays. Almost all interviewed actors explained that their organization is aligning their program objectives and strategies to the national strategies, when existing, and have been consulting with the relevant ministries to mainstream and coordinate their work. Strategies specifically mentioned include the CEDRE conference proceedings of April

2018, the Lebanon's Economic Vision published in January 2019 by the Ministry of Economy and Trade, and Lebanon National Agriculture Strategy (2020–2025).

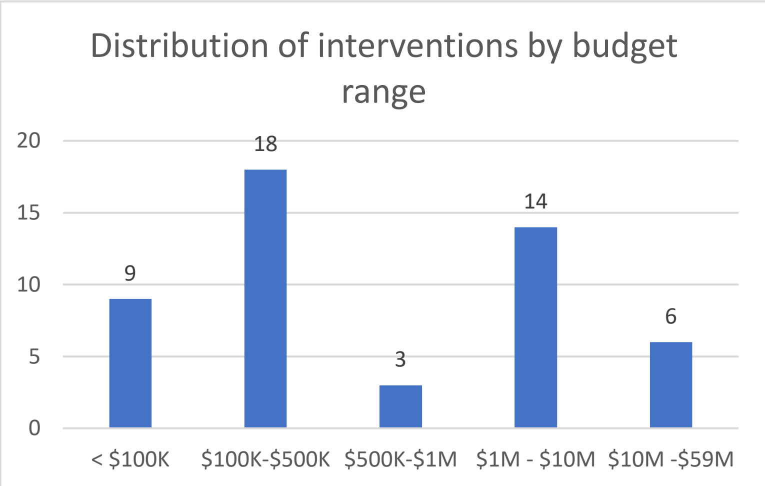

Figure 2. Distribution of interventions by budget range

Overall, more than $475 Million are invested in donor funding to the various assessed interventions, with funding per project ranging from as low as $6,000 per intervention to $59 Million USD for multi-year programs. Figure 2 provides a distribution of number of projects assessed by budget ranges per project.

The highest numbers of interventions (18) had budgets ranging between $100,000 and $500,000 per intervention and were mostly implemented by FAO. Overall, FAO had the highest number of projects, either funded by FAO or implemented by the organization through other sources of funding and covered a large array of sectors and sub-sectors. The highest three project fundings were related to USAID funded new projects targeting MSMEs and value chain support (3 projects with funding between $57 Million and $59 Million), followed by ILO-EIIP projects focusing on cash for work and support for livelihoods through agricultural labour-intensive activities.

On the other side, the Lebanon Emergency Response Plan places Lebanon's funding needs for 2021-2022 at $115.4 Million, only $5,400,000 of which have been allocated so far, leaving a funding gap for the coming year of $110 Million yet to be filled[9].

Summary of support by geographical region and types of beneficiaries

The Lebanon Crisis Response Plan focused efforts mostly on the 251 localities specified in the UNHCR map[10] of distribution of Syrian refugees, with the aim of supporting Syrian refugees and host communities considered to be under highest pressure due to the increased population and subsequent increased pressure on natural resources and public services. Most assessed projects had a national scope with a focus on those localities while 8 were more focused on Akkar and the Beqaa and only three specifically worked in Mount Lebanon. The analysis of funding distribution by governorate for the LCRP funding alone shows that North Lebanon is receiving

[9] Food Security Sector Emergency Response Plan- Dashbaord- October 2021.

[10] https://data2.unhcr.org/en/documents/details/45715

the highest percentage of the total funding (26.33%), while the Beqaa, the largest agricultural area in Lebanon, gets 19.19% of the funding (Figure 3).

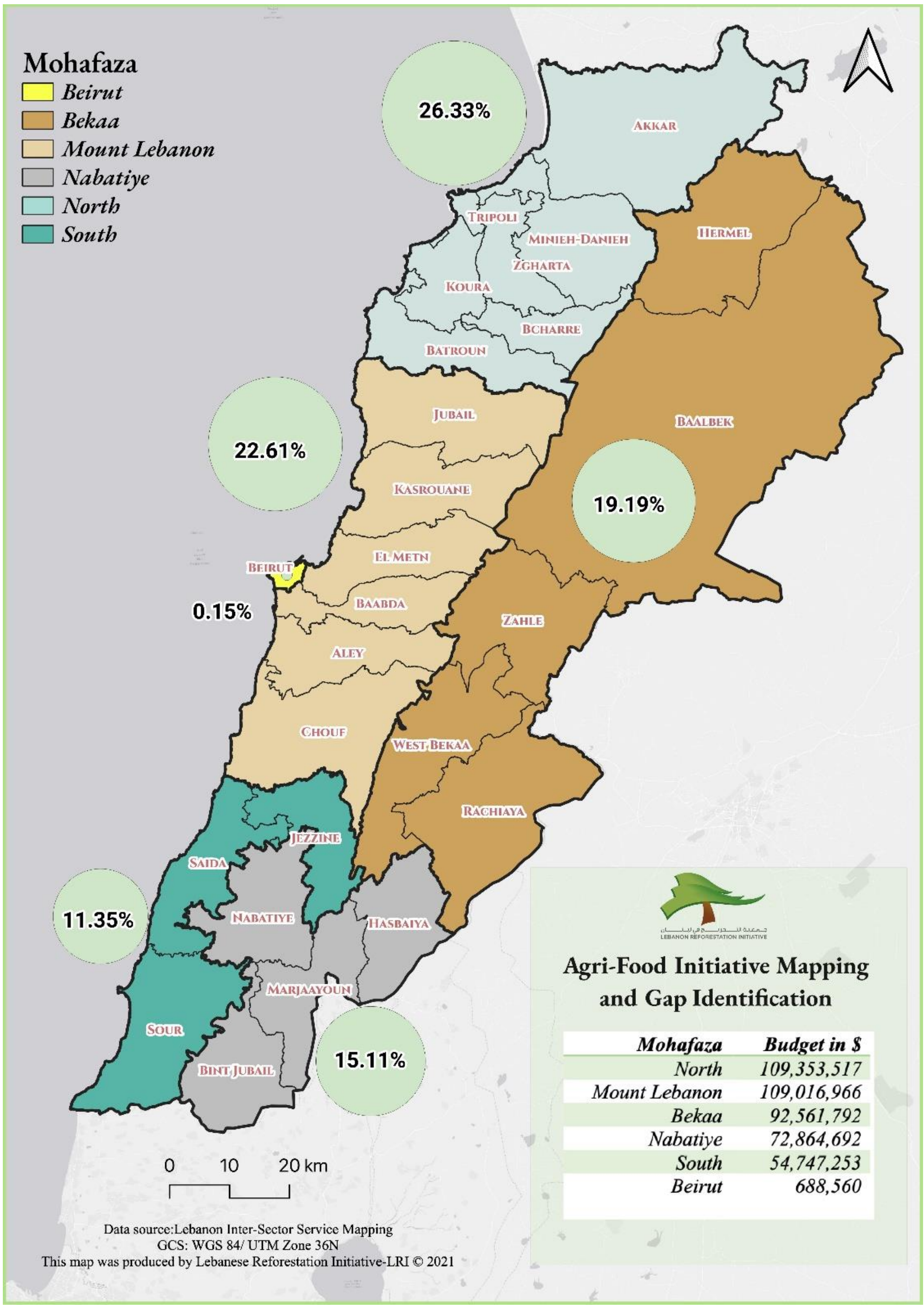

Figure 3. Distribution of agricultural project funding by geographical region

The distribution of organizations working in each district under the LCRP does not however necessarily correlate with the scale of funding distribution. As shown in Figure 4 below, there are more organizations working in the Beqaa and Akkar than in other regions of Lebanon. While disaggregation of funding data by district is not available at the moment to improve the correlation, the combination of the two maps can provide insights as to where organizations need to redirect their work to ensure good coverage of all areas, especially in the current economic crisis that is affecting all regions of Lebanon with no exceptions.

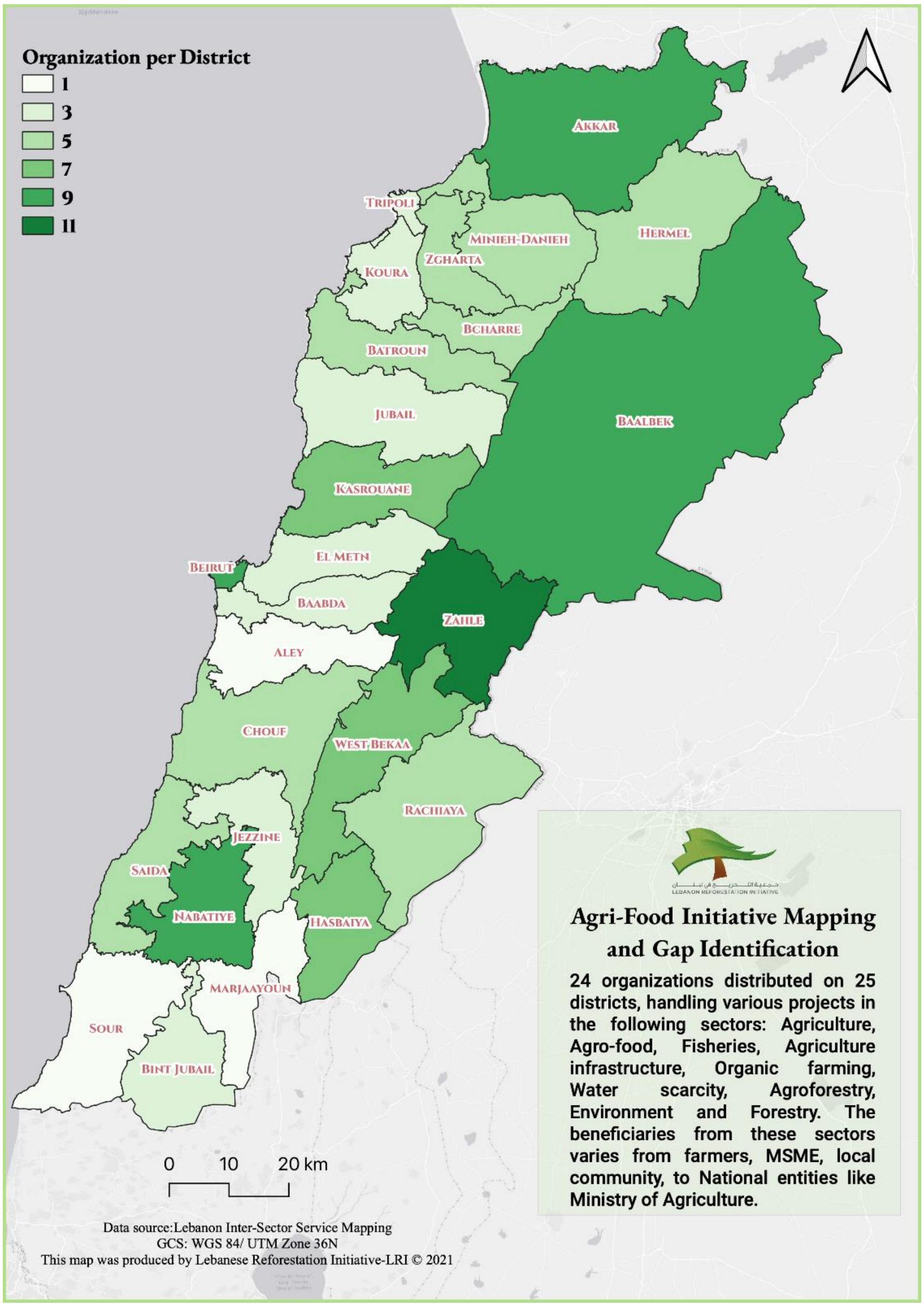

Figure 4. Distribution of organizations working under the LCRP by district

In these locations, support has been reaching vulnerable communities residing in Lebanon, including displaced Syrians (67%), vulnerable Lebanese (31%), and Palestinian refugees (2%).

Most projects reported supporting farmers directly either through cash for work or input supplies or in some cases through infrastructure such as in the case of the ILO and FAO projects supporting farmers with basic infrastructure improvements such as walls and water reservoirs. Nine projects only focused on SMEs or MSMEs and two had a clear focus on women and women cooperatives, while two specifically targeted banana and 'zaatar' producers.

Support came in different forms that included in-kind food assistance, cash-based food assistance, farmers' emergency assistance to promote agricultural investment, cash-for-work in agriculture, technical and material support given to agricultural groups and cooperatives or SMEs, and trainings on skills in the form of Food Assistance for Training. As listed, most support is coming in the form of direct financial and livelihoods support to individuals and farmers while infrastructure and trainings, and grants framed under climate action and more progressive had become secondary viewing the current economic crisis.

Summary of support by sector and sub-sector

Table 2. Distribution of funding by sub-sector

Sub-sector	Budget in $
Rangeland management	$7,798,000
Banana plantations	$131,000
Business development	$1,762,781
Good agricultural practices / Pest management	$251,589,575
Gender awareness	$395,823
Greenhouse production	$1,497,838
Landscape restoration	$7,757,635
Livelihood	$24,679,931
TCP (Planning, QC, R&D)	$293,000
value chain / business development services	$175,000,000
Water resources management and rehabilitation	$4,345,647
Grand Total	**$475,251,229**

Agricultural support funds have also poured towards two production channels: value chain and business development, and individual farmer support. Agriculture support projects now consider an integrated value chain development approach that is inclusive to production, quality control, and the creation of market linkages in local and export channels. Such support, depending on the donor, has targeted commercial agriculture like the LIVCD and LINQ as well as sustainable agriculture and slow-food systems like MedSNAIL. Individual farmer support has come in the form of vouchers offered by green plan through the FAO pipeline, to be used in agricultural land reclamation, works in water installations and irrigation, fencing, vineyard trellising and seedling purchasing. NGOs working close with communities (like LRI and RMF and Mada association) support farmers through best-practice trainings, cost reduction by provision of basic material, provision of chicken coops, and through the introduction of alternative agricultural practices like organic agriculture and agro forestry. Other projects supported environmental issues pertaining to chemical pesticide pollution and water canal rehabilitation. Two large scale projects funded the forestry sector and aimed at landscape restoration through government donations managed by the FAO. Pest control assistance came through two projects targeting the Fall Armyworm and the Desert Locust as emergency assistance. Table 2 provides an overview of funding distribution by sub-sector for the sub-sectors included in this assessment.

Analysis of the current funding patterns and gap identification

The combination of the data analysis and interviews findings have revealed gaps in the support provided for the agricultural and agri-food sector in Lebanon that can be divided into sector-related gaps, gaps related to type of beneficiaries and gaps in the geographical distribution of the support over the Lebanese territory. Whilst acknowledging that this study is limited by the amount and quality of data provided and time allocated, the gaps detailed below can provide a baseline for entities planning new interventions in the sector.

Identified gaps for the sector

A large number of current interventions are targeting direct livelihood support and using a "cash for work" approach to agricultural support. These projects came from the pool of funds inputted by donors as an emergency response in view of the numerous emergencies that Lebanon has been through and in line with both the LCRP and ERP developed to respond to the Lebanese crisis. Other projects still tackled value chain development, capacity building, and business development, which are at the core of long-term sustainable development of the sector. Although projects currently implemented or planned are highly diverse and tackle several sub-sectors, at various scales of funding and geographical coverage, farmers and agri-food producers are still suffering from overarching challenges that are either not properly, not fully or not at all tackled by existing and previous projects and programs.

The currency devaluation has created a huge deficiency in the yearly cost-benefit analysis of agricultural production, as most inputs are imported in foreign currencies while production is sold in the local one. Cost of labour has also more than tripled in the last year, leading to further financial disbalance. Numerous cash for work projects have been supporting municipalities with labour costs. However, very few provided such support to private landowners and farmers.

The fuel crisis has also affected agriculture and agri-food value chain actors at various levels. Machinery operations in field crops have halted or reduced drastically and cost of fuel has also become another hindrance to new production planning. Factories closed around the country for lack of energy to operate. Transportation costs have increased drastically and in several cases transportation of products was halted or delayed for lack of fuel, leading to serious losses in fresh products. Refrigerated transportation and storage is yet another major sub-sector that is highly critical for product quality, marketing and human health, and that was severely affected. Cold storages across the country are already lower in number and space than the actual needs and only part of them were able to operate in 2021, leading to a large proportion of production left without cold storage. Fuel shortage also affected water pumping as most wells and springs are operated on fuel-based generators. Among the projects assessed, only a couple tackled alternative energy sources, mainly focused on solar energy. A summary analysis of these and other major challenges faced by sector actors and available and needed support are provided in table 3 below.

Table 3. Challenges, support and gaps in the agricultural sector in Lebanon

Challenge	**How are existing projects addressing the challenge?**	**Gaps remaining**
Currency Devaluation and bank-related challenges	-Several donors are shifting to dollarization -Cash for work interventions are paying workers in USD -Payments to local providers are mostly done in USD -Budgets are being adjusted to cope with the current value	-Access to finance for farmers and smallholders is still an issue - Export channels need to be improved to support in providing fresh funds
High cost of inputs: All sector actors are facing serious challenges in input prices mainly due to: - Inputs being mostly imported and thus prices in USD - Inputs produced locally are limited in quantity	-Vouchers are being provided for farmers to pay some of the input costs -Support for local production of inputs is provided in the case of compost, fertilizers -Support for women coops in jars and raw material -Support in capacity building of local input producers	-Multinational agreements are needed to provide inputs in quantities and at low costs -Support for the establishment of local production of fertilizers, biopesticides, and seeds is still very limited -Animal feed availability is still a big issue with limited support- programs supporting animal feed alternatives, large scale planting of animal feed or encouraging agro-silvopastoral practices are needed.

Increasing cost of labour	-Cash for work projects are supporting short term employment of people in public lands and religious endowments mostly.	-Cash for work projects working with farmers and agri-food producers need to be scaled up. -Allowing cash for work in private land can support in reducing labour cost for agricultural and agri-food activities.
Fuel prices and unavailability: - Affected product transportation - Affected field operations and machinery - Cold storages are either closed or asking for high space rental prices - Affected water pumping - Affected industry operations	- Very few projects are tackling alternative energy sources - One project recently started providing fuel - One project specifically supporting solar energy for water pumping - Projects supporting cooperatives for resources sharing - Limited projects tackling water access and use	- Large gap in support provided compared to the needs - Need to tackle alternative energy sources, not only solar - Focus support on key value chain actors such as cold storages, transportation, cooperatives'machinery, industry - Need to build capacity on innovative solutions for energy use and conservation - Need to ensure farmers have access to water and are using water efficiently- gaps still exist across the country in small holder and farmers not having access to water.
Lack and high cost of animal feed largely affecting farms (leading to major reduction in herd sizes)	- Only one assessed project tackled animal production	- Support for local production of feed - Support for innovative feed alternatives
Dairy and meat production -local dairy production increasing but challenged by lack of cold storage and quality control	- Value chain support projects are tackling the dairy value chain	- Support innovative products in dairy and meat production for import substitution

-increasing competition on specific types of common dairy products -meat production costs are increasing and competition with imported meat is further accentuated	- Some support to quality control and food safety for dairy products - Limited support to the meat production sector - Support for the dairy value chain is leading to high competition as all are focused on the same type of products while other products are still exclusively imported	- Support quality control standards for dairy and meat - Develop capacities of actors on proper branding and codes and standards - Increase support for the meat production sector
Major challenges in marketing	- Two projects tackled support for agri-businesses in marketing and establishing expert channels - A couple of other projects work on technical assistance and building capacity for MSMEs and women groups on marketing	- Need more support for innovative large scale marketing solutions (e-commerce, export channels, web-platforms, etc.) - Need to establish linkages between small producers and marketing channels with clear financial terms that support farmers benefit - Need to further develop innovative products that can compete in local and international markets
Fisheries sector suffering from heavy pollution of fresh water and lack of organization and proper marketing of sea fishing	- One current project tackling fisheries	- Need to work on fresh water pollution - Need further support for the organization of this sector, as well as quality control and marketing
Challenges related to farm size or legal registrations	- Most projects are either setting threshold for farm size or focusing on supporting MSMEs that are legally registered.	- Family-owned businesses that constitute a large section of the agriculture community in Lebanon are often not receiving support as they do not fit

		project thresholds and requirements, although they are key actors in the sector. - Legal frameworks should be updated and communicated clearly to citizens to encourage them to register and follow the set codes and standards.

Summary gap analysis by beneficiary groups

For the past year, donor funds have been targeted to benefit vulnerable communities, including host and refugee communities mostly through cash-for-work in infrastructure and farming. Most support has been focused on communities in the 251 localities with highest Syrian refugee numbers.

Recently, donors under LCRP started shifting their support to include vulnerable Lebanese citizens as well. In most cases cash for work donors are now requiring a 50/50 ratio of Syrian/Lebanese engaged. However, the current crisis is putting huge number of Lebanese families under the poverty line, with numbers increasing by the day. A vulnerability assessment for Lebanese families is needed to better guide planning on this level. Also, Lebanese beneficiaries are often selected from the NPTP (National Poverty Targeting Program) list for which a planned scale-up has been halted due to COVID19 lockdowns and is now restarting. Including more families in this database will allow donors to target a larger proportion of the highly vulnerable people and reduce concentration of support on same families.

Women have been the target of many projects specially ones pertaining to capacity development in the agri-food and Non-Wood Forest Products sectors, from harvesting to processing and business development. Gender mainstreaming is clearly improving over the years and targets for women empowerments are incorporated in most projects. Training and capacity building projects are especially done through local community organizations and cooperatives. Women have been also targeted as agricultural workers in areas where agriculture is the main productive sector like Akkar, Bekaa and Baalbeck-Hermel. Women are also benefiting from support for the establishment and development of chicken coops and house gardens, and in the food processing chain. Overall women engagement is still however below the equity standards and requires continued focus on gender mainstreaming of projects and women inclusion in productive activities.

Youth are mentioned explicitly in the description of one project only and seem to be generally missing as a specified target in project planning and application, although actual beneficiaries' data show good proportions of youth engagement. Youth are actors of change and can play a major role in improving the sector if properly empowered and technically equipped. Young farmers and agri-food processors are more likely to adopt new techniques, search for and implement innovations and act proactively in case of crisis. They can also use technology to improve the sector and introduce new ideas for marketing. Projects specifically targeting youth are still needed across the country to further support their role as drivers of positive change.

Summary gap analysis by localities

Donor support was reported as national in coverage for most of the projects. Lack of detailed data on localities has limited the ability to conduct a detailed analysis of contributions by district or cadaster. However, the LCRP database provided a clear overview of funding by governorate as well as number of organizations working in each district, that allows drawing a few conclusions as to where support is mostly missing. It is however important to note that the LCRP includes only data related to actors under the program and thus does not include bilateral funding such as USAID projects that constitute some of the biggest project funding per intervention. USAID funding is however reported to be national in scope and aiming at supporting equally all governorates and community groups.

As shown in Figure 4, some districts such as Aaley, Marjayoun and Sour have only one reported organization working there, while Bint Jbeil, Jezzine, Baabda, Metn, Jbail and Koura have less than 3 organizations, compared to Zahle where the concentration of organizations is at its highest. For the agricultural sector, the South is an important area for the cultivation of olives, carobs, lemon and orange and bananas. Metn and Jbail host large extents of greenhouse production, fruit trees and some new fruit tree options such as avocados and annonas that can be good export and import-substitution options. In the current severe crisis mode, support for the agricultural sector should be proportional to the agricultural land area and type of products in each region and thus spread equitably across districts.

Conclusions and General Recommendations

While acknowledging data limitations, this study attempted to map existing interventions to the agricultural and agri-food sector with the aim of defining gaps in support that would guide planning for future interventions.

Overall, the agricultural sector in Lebanon is suffering from very serious challenges that are leading to a gradual decline in the sector, represented by a reduction in production, number of actors leaving the sector and major financial losses.

In parallel, a large amount of funding is being placed to support this sector and get it through the crisis. Funding has been supporting direct livelihoods of communities through cash for work approaches. Capacity building and trainings are provided to farmers across sub-sectors and regions. Support for value chains and business development is increasing and taking more importance in the last couple of years and has the potential to drive serious improvements in the sector. Linkages with export markets are being created but need strengthening and scaling up. Support for infrastructure development and input supplies is done but the need is much larger than the support.

Consequently, donors planning new interventions in this sector are encouraged to consider the following approaches:

- Promote projects that enable SMEs and cooperatives to be more export oriented, including supporting them in improving production, quality control, applying national and international quality standards, and getting the needed certifications.
- Promote crops and products that substitute imported goods with local productions as well as techniques that use already existing local raw material to produce substitutes to imported goods, while ensuring support covers all aspects from production to proper marketing with proper quality control. In parallel, avoid supporting the same type of product recurrently to avoid getting to a point of high competition on the local market, leading to losses.
- Inject capital for MFIs through grants, loans and staff capacity building and training. Identify MFIs funding agri-food actors, conduct needs assessment and apply activities that help them provide financial means to farmers and SMEs in an efficient and sustainable matter.
- Support access to water for farmers and promote water conservation techniques across the country as water availability is expected to be reduced with the effect of Climate Change. Techniques such as rainwater collection through the establishment of underground tanks and rainwater collection networks and drip irrigation should be scaled up across the country.
- Promote alternative sources of energy, including solar, wind, and bio energy to reduce dependency on fuel, especially for key actors in the value chains such as cold storage facilities or water pumping stations.
- Promote agro forestry in areas where agricultural lands are small, and the landscape is majorly forest and slopes.
- Mainstream climate change considerations in project planning and promote sustainable land management practices.
- Consider projects to support the fisheries sector from water pollution solutions to marketing.
- Consider basing geographical distribution of projects on sector activity and needs, prioritizing areas that have not been receiving support in the last few years.
- Consider developing projects specifically focused on youth in the sector.

- Consider including small-scale farms and non-registered family businesses and include support for registration within the project objectives.

- Include private farmers and agri-businesses in cash for work projects with clear conditions on vulnerability and contribution to the sector.

With the current huge needs that are affecting the agricultural sector in Lebanon, among other sectors, close coordination and complementarity between donors and interventions is highly needed to maximize impact of funds and lead to positive steps towards improvements.

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