

DIAGNOSIS OF THE LEBANESE AGRICULTURE IN LIGHT OF THE LATEST FINANCIAL CRISIS

Impact on 2019-2020 agricultural campaign



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Initially, when my lecture was set last September, that is before October 17,
I had conceived my lecture in line with the governance environment
that had ruled Lebanon for the past 28 years

not that I did not agree with that governance but was unable to confront it alone
but the forces who were –and still are – ruling the country
***are responsible for preventing any sustainable development
of the Lebanese Agriculture***

The title of my lecture under pre-crisis conditions, was:

DIAGNOSIS OF LEBANESE AGRICULTURE
THROUGH CROP VALUE ANALYSIS 2013-2018
IMPACT OF WARS IN SYRIA & IRAQ
CONFIRMATION OF ENDEMIC PROBLEMS

I had planned to:

- **analyze the four missions** of Lebanese agriculture on the following levels,
 - * at SOCIAL level
 - * at NATIONAL ECONOMY level
 - * at FOOD SECURITY level
 - * at ENVIRONMENT level
- **underline all its positive factors**
- **Diagnose its problems and challenges** and
- **suggest workable and sustainable solutions** under prevailing conditions

MEANWHILE THE RECENT LEBANON ECONOMIC & FINANCIAL CRISIS

**ARE PROGRESSIVELY REVEALING AND CLARIFYING
THE CONCEPTUAL AND SYSTEMIC NEGATIVE ISSUES
WE KNEW ABOUT AND SUFFERED FROM**

ALTHOUGH SOME CITIZENS SEEM STILL UNAWARE ABOUT
THE MAGNITUDE OF THE ECONOMIC AND SOCIAL EFFECTS OF THE CRISIS

I believe that

- we are no more in a situation of managing endemic problems resulting from bad governance and corrupted leaders,
- but it becomes an emergency to address the impact of the crisis on:
 - * Lebanon's agriculture immediate future
 - * Food and environmental security issues

While past production figures remain a reference,
many production factors and marketing elements
have been effaced by the financial crisis
imposing a new very short term approach
to address the expected immediate hard times in 2020

Thus the new approach and new title of my revised lecture:

**DIAGNOSIS OF LEBANESE AGRICULTURE
IN LIGHT OF THE LATEST FINANCIAL CRISIS
Impact on 2019-2020 Agricultural Campaign**

But first before analyzing the impact of the crisis

A SHORT GENUINE PRESENTATION ABOUT THE LEBANESE AGRICULTURE

Genuine because it shall not repeat the commonly stated reasons of Lebanese Agricultural failure(s) such as:

- Limited land with small tenures
- High labor cost, high input cost, high finance cost
- Absence of markets valorizing the output etc.



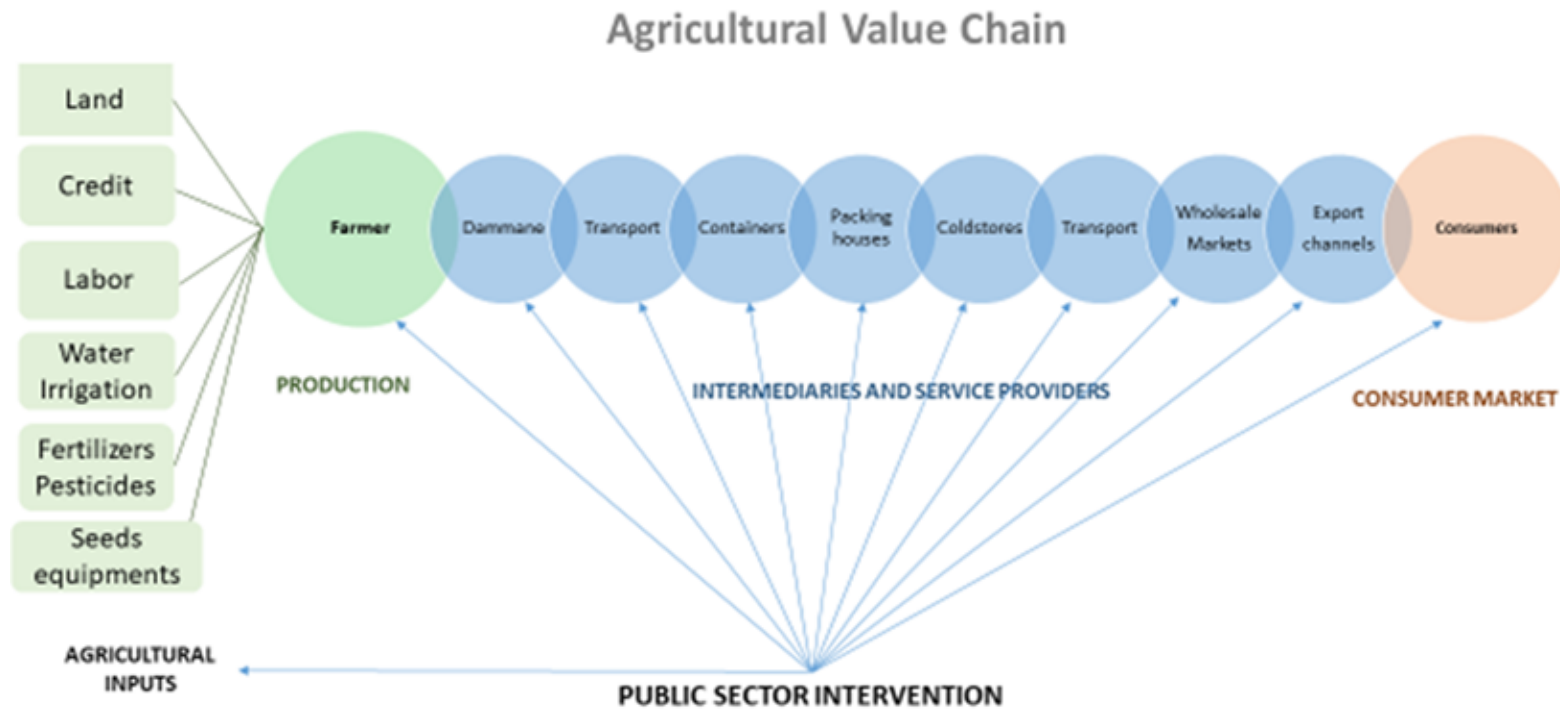
Genuine, based on our scientific method and on-the-ground approach of CREAL, based on:

1- AGROFOOD VALUE CHAIN

considered as an integrated entity

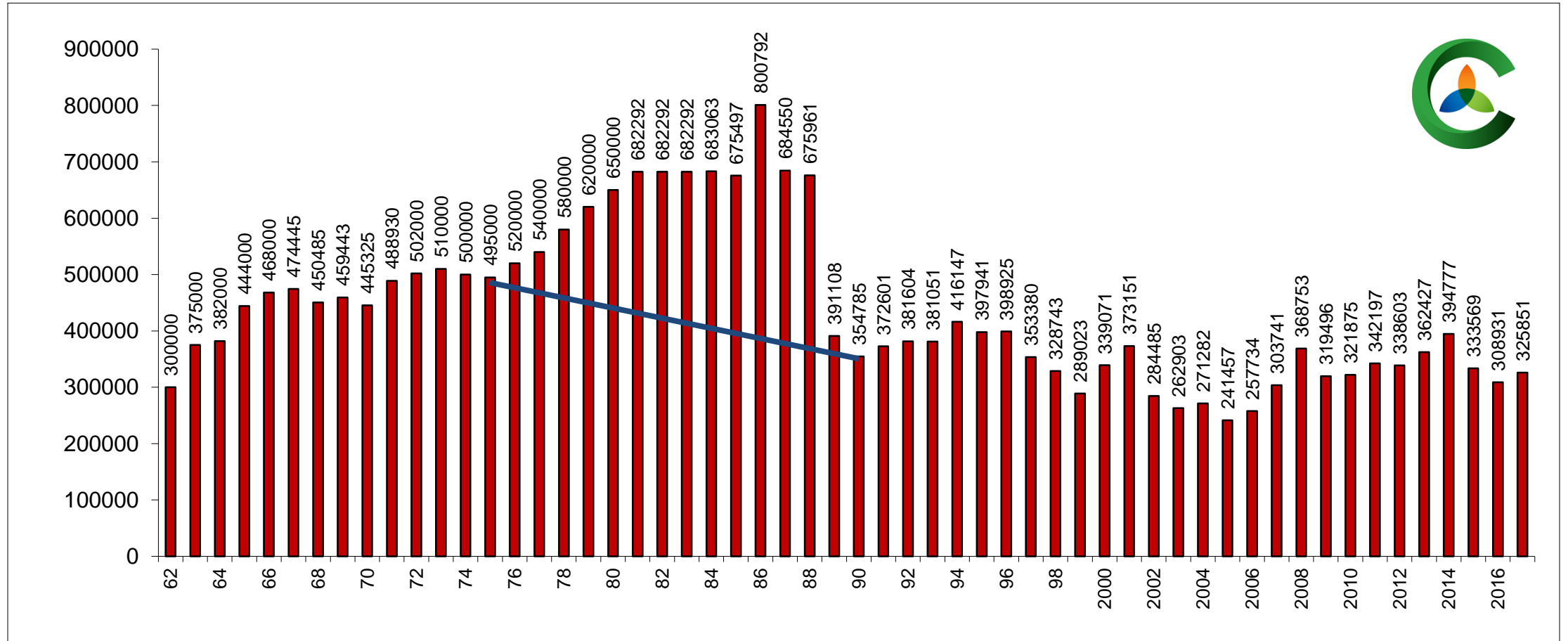
And on

2- RELIABLE DATA, yearly updated since 1951 and which is presently, the only source of reliable Lebanon agricultural statistics

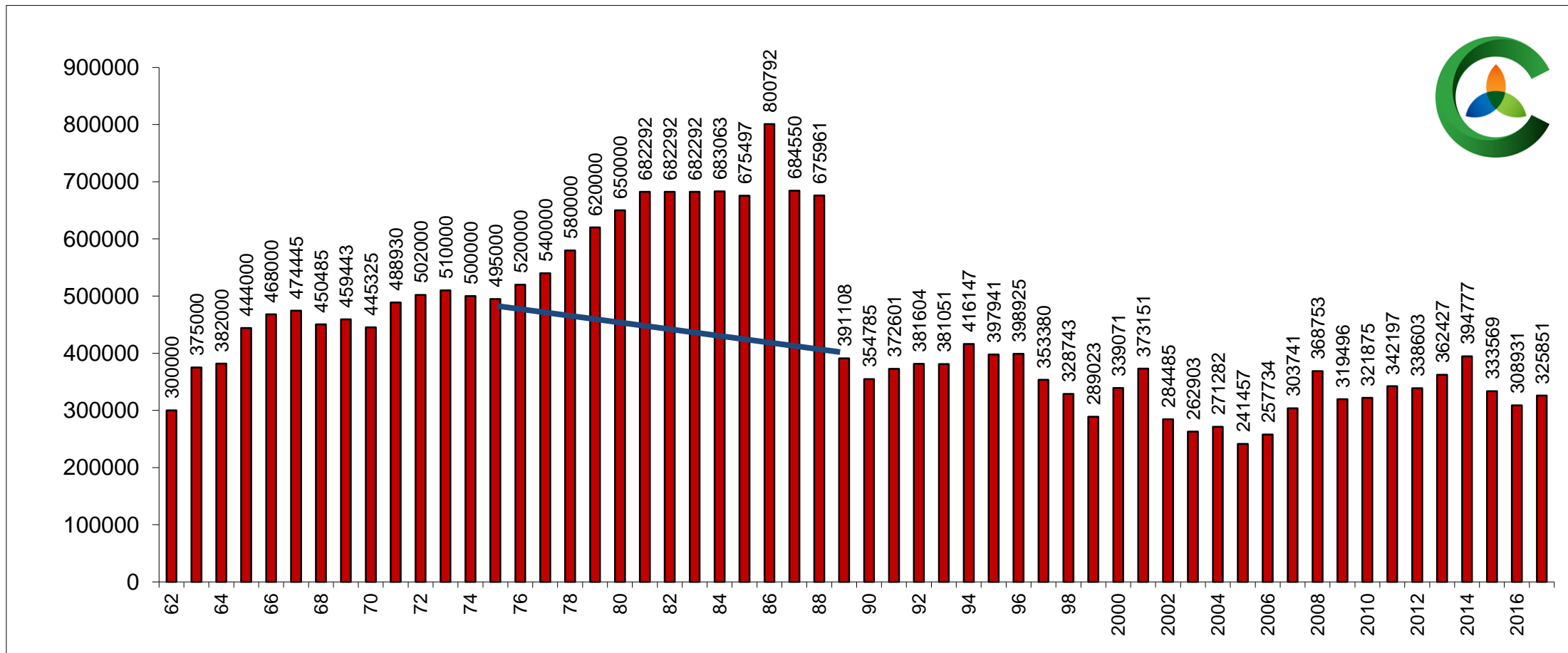


SO HOW DOES THE
LEBANESE AGRICULTURE SECTOR
LOOKS LIKE TODAY?

One way of assessing a sector is to analyze the evolution of its Historical Gross National Product



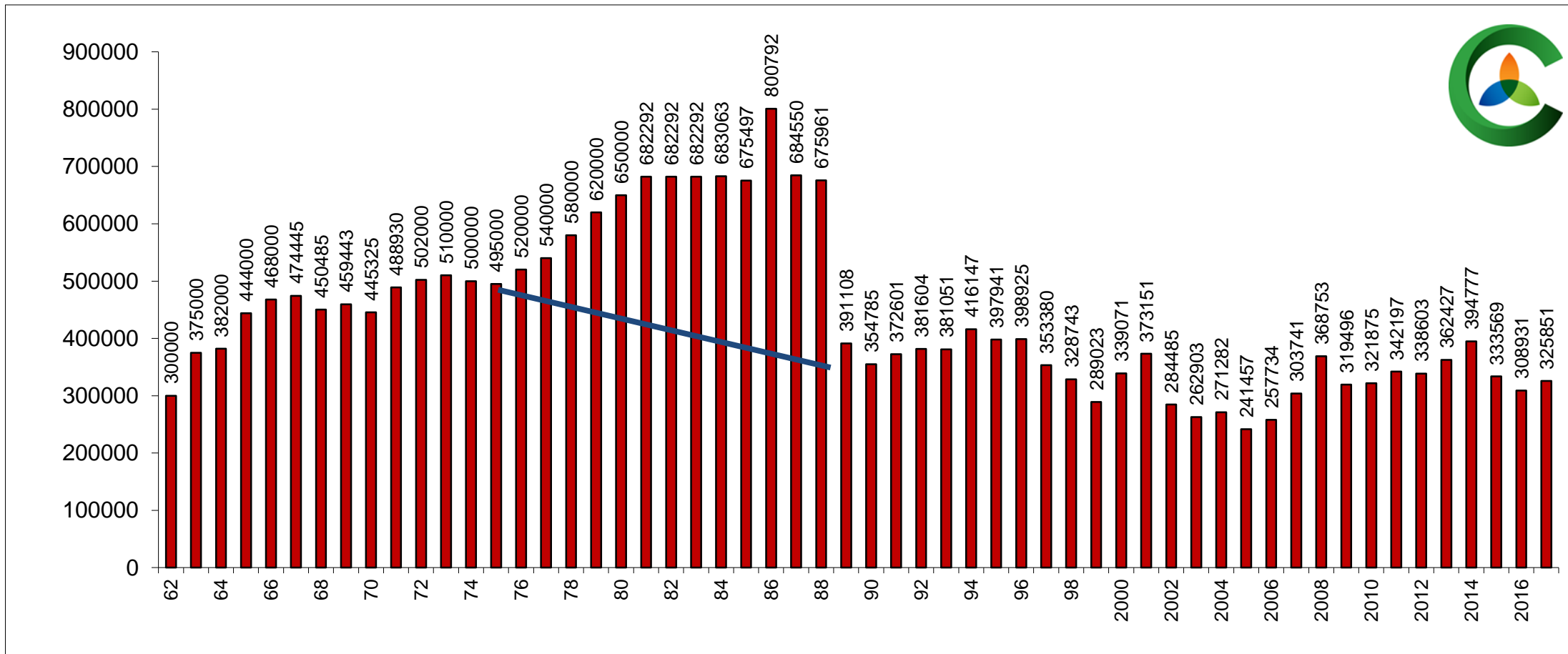
Gross National Agriculture Product of Lebanon 1962 – 2018 (in constant value of Lebanese Lira X1000)



Gross National Agriculture Product of Lebanon 1962 – 2018 (in constant value of Lebanese Lira X1000)

1962-1966: steady increase of GNAP by 48%,

result of the wise development policy of President Fouad Chéhab(1958-1964), the only President who had **the vision of a State**, built and governed with **committed professionals** through **Administrative Structures and individuals devoted to Development and focusing on the general wellbeing of the Lebanese Citizens**

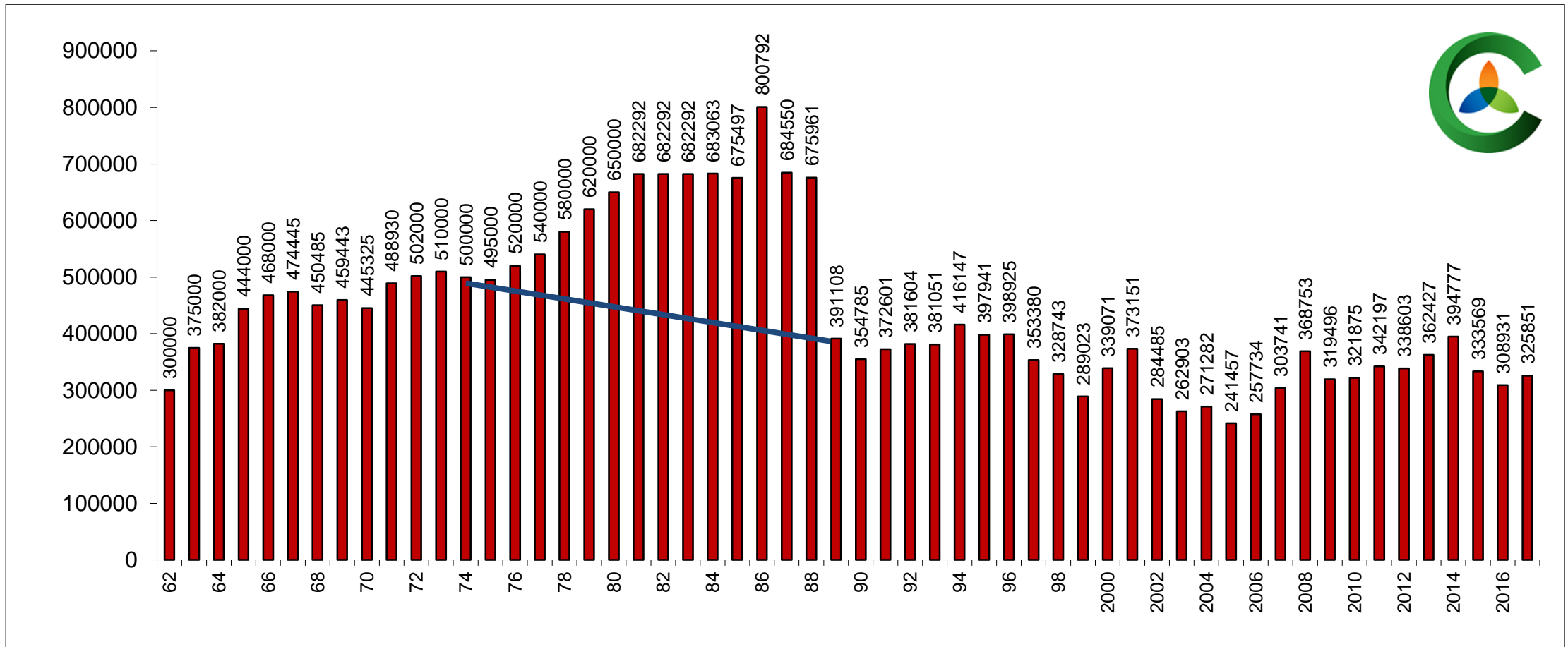


Gross National Agriculture Product of Lebanon 1962 – 2018 (in constant value of Lebanese Lira X1000)

1967-1975: GNAP entering a stagnation period

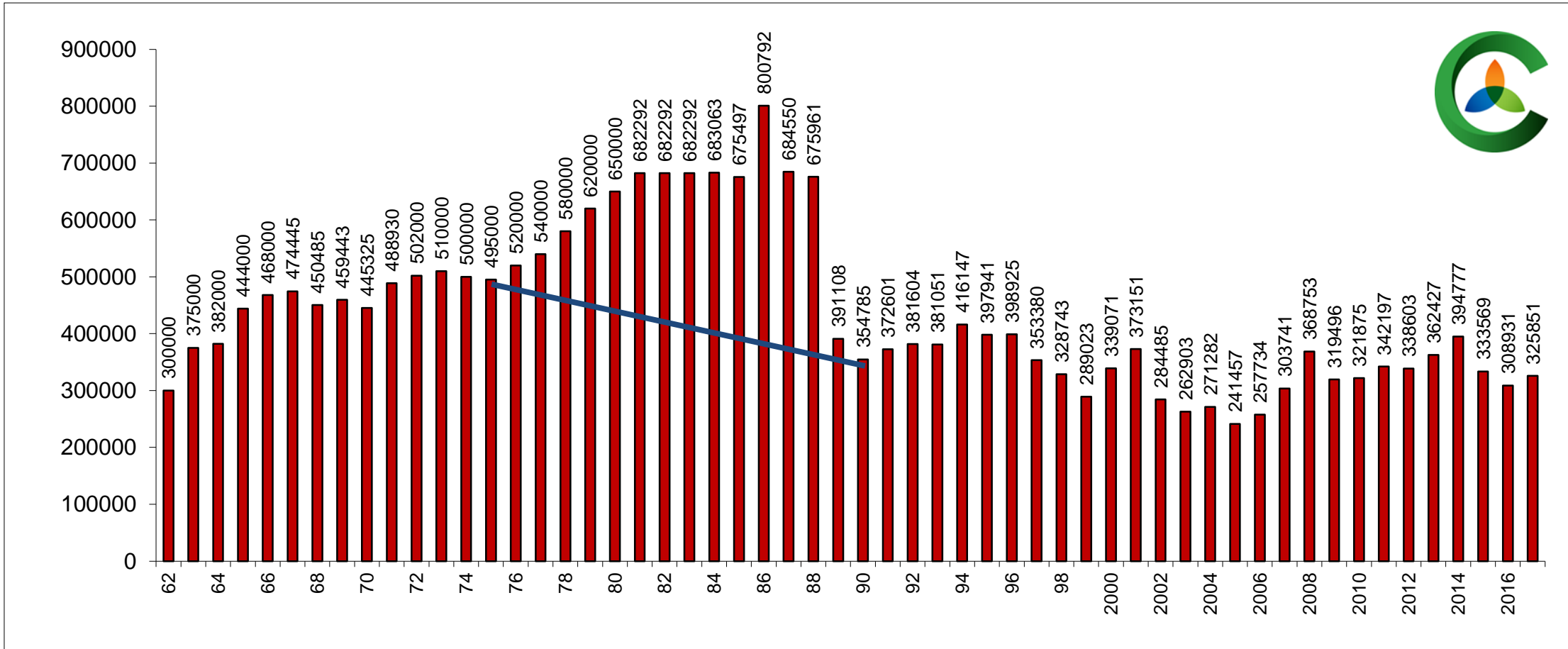
with the **slow dismantling of State Institutions**,

increasing starting **1970**, a year that witnessed a **drastic change in governance culture** with **corruption** permeating most Administrations



Gross National Agriculture Product of Lebanon 1962 – 2018 (in constant value of Lebanese Lira X1000)

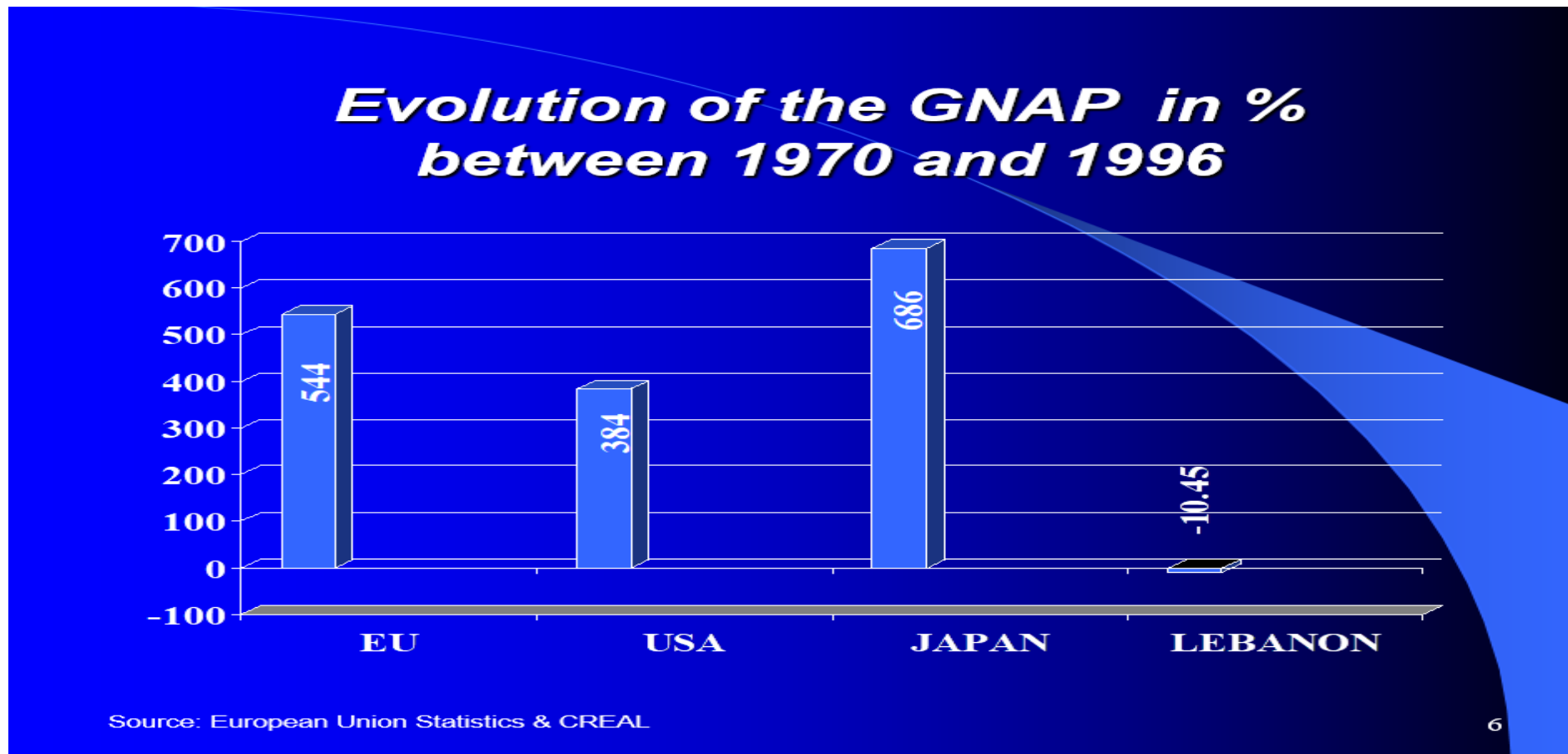
1975-1988: War destruction of Agriculture Production
disruption of marketing structures,
while prohibited crops were booming



Gross National Agriculture Product of Lebanon 1962 – 2018 (in constant value of Lebanese Lira X1000)

1989-2018: A period of Agony for the Lebanese Agriculture

HOW DOES IT COMPARE WITH OTHER COUNTRIES



While World Agriculture fast developed, Lebanese Agriculture Receded

SO WHAT IN THE WORLD WENT WRONG
AND LATELY BURST
WITH THE GROWING NATIONAL FINANCIAL CRISIS?

**AT THE
PUBLIC SECTOR LEVEL**

SO WHAT WENT WRONG AND LATELY BURST WITH THE GROWING NATIONAL FINANCIAL CRISIS?

ON THE PUBLIC SECTOR LEVEL



ON THE PUBLIC SECTOR LEVEL



1967-1970: Slow move in the Administration,
from civil service to self-service mentality,
creating a bottleneck and hampering the support of the State
which is constantly needed for a sustainable growth of Lebanese Agriculture
at both production and marketing levels

ON THE PUBLIC SECTOR LEVEL



- 1970-1975: Institutionalization of bad governance,** openly using official Administration positions to serve personal interests. Unprofessional persons were appointed in critical positions, leading to:
- **wrong policies**
 - **open and legitimized robberies of public money**

ON THE PUBLIC SECTOR LEVEL



1975-1992: Total absence of Public Administration, **replaced by local militia** feeding a destructive war that served foreign interests and enriched warlords
Farmers suffered from a distabilized input market
Farmers were exploited by wholesale markets and large landowners run or influenced directly or indirectly by militias
Export market structures collapsed and were controlled by non Lebanese entrepreneurs resulting in fewer returns to Lebanese farmers

On the PUBLIC SECTOR LEVEL

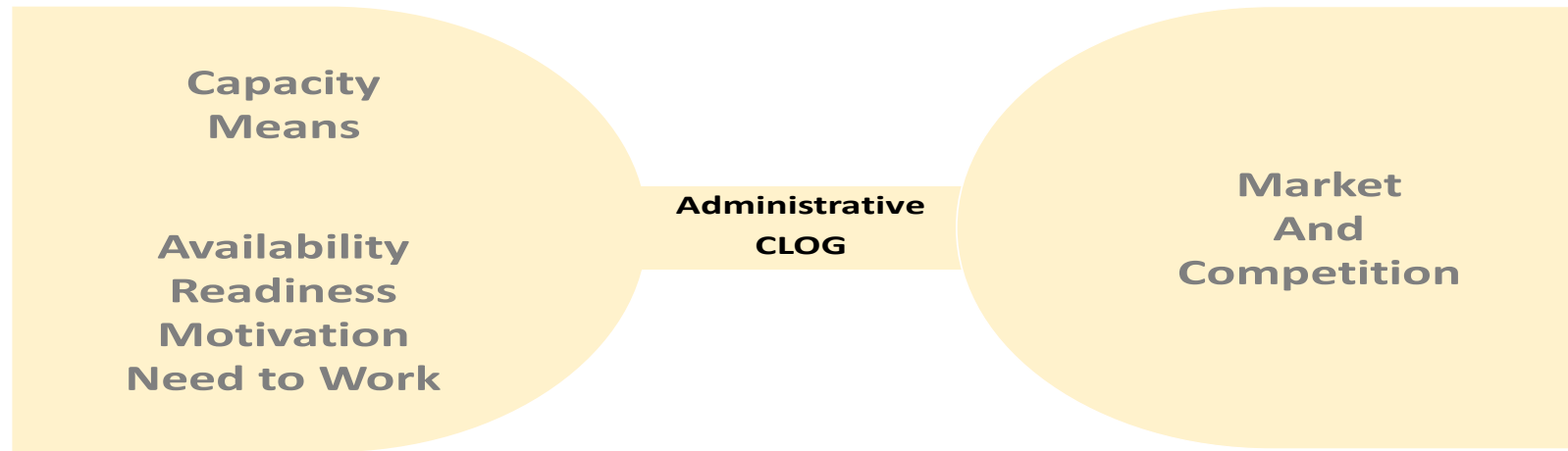


1992-2020: Total Administrative clog towards the Agriculture sector

The Lebanese State responsible for the reconstruction of Lebanon

**simply omitted to consider the Agriculture sector
going as far as TO IGNORE IT.**

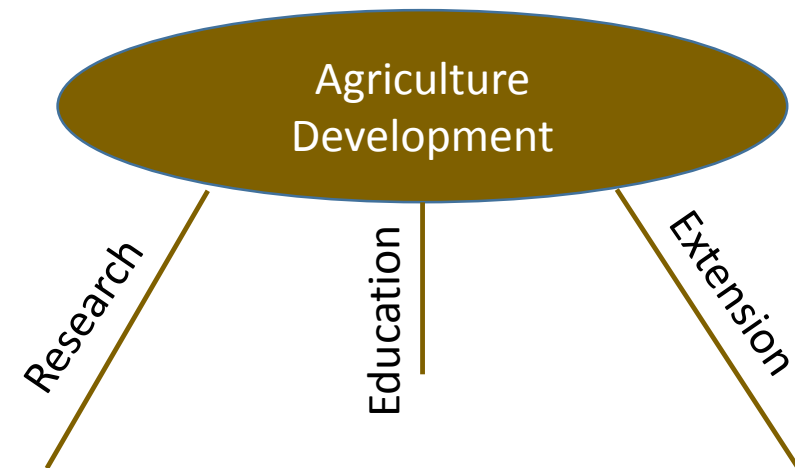
On the PUBLIC SECTOR LEVEL



As a reminder

The three pillars of Agricultural Development

- * **Research** which was top before 1975, destroyed by war, today an almost empty shell (by intl standards)
- * **Education**
 - poor at Technical schools level
 - At College level, balance theory/practical needs big improvement, with limited knowledge of Lebanese Agriculture Economics
- * **Extension**: simply absent with very rare exceptions



AT THE LEVEL OF
INTERNATIONAL SUPPORT

SO WHAT WENT WRONG AND LATELY BURST WITH THE GROWING NATIONAL FINANCIAL CRISIS?

AT THE LEVEL OF INTERNATIONAL SUPPORT

- International Organizations: FAO, UNDP, World Bank
- European Union
- Bilateral support: France, Italy, Germany, USA, Holland

FEW COUNTRIES, IF ANY, HAVE BENEFITED OF THE SYMPATHY OF THE INTERNATIONAL COMMUNITY AS MUCH AS LEBANON

Throughout the “reconstruction process” that started in 1992, all organizations and friendly countries have constantly supported us

SO WHAT WENT WRONG?

Among countries and Unions,
Each of Lebanon's supporters had its own agenda
**and few if none among Lebanese Authorities were able
to direct foreign support towards the country's interests**

International Organizations' projects were conceived by
foreign experts who often had little or no knowledge
about the intricate Lebanese Agriculture, and again had
**no Lebanese counterparts
who would sufficiently challenge their approach
so to adapt it to Lebanese conditions**

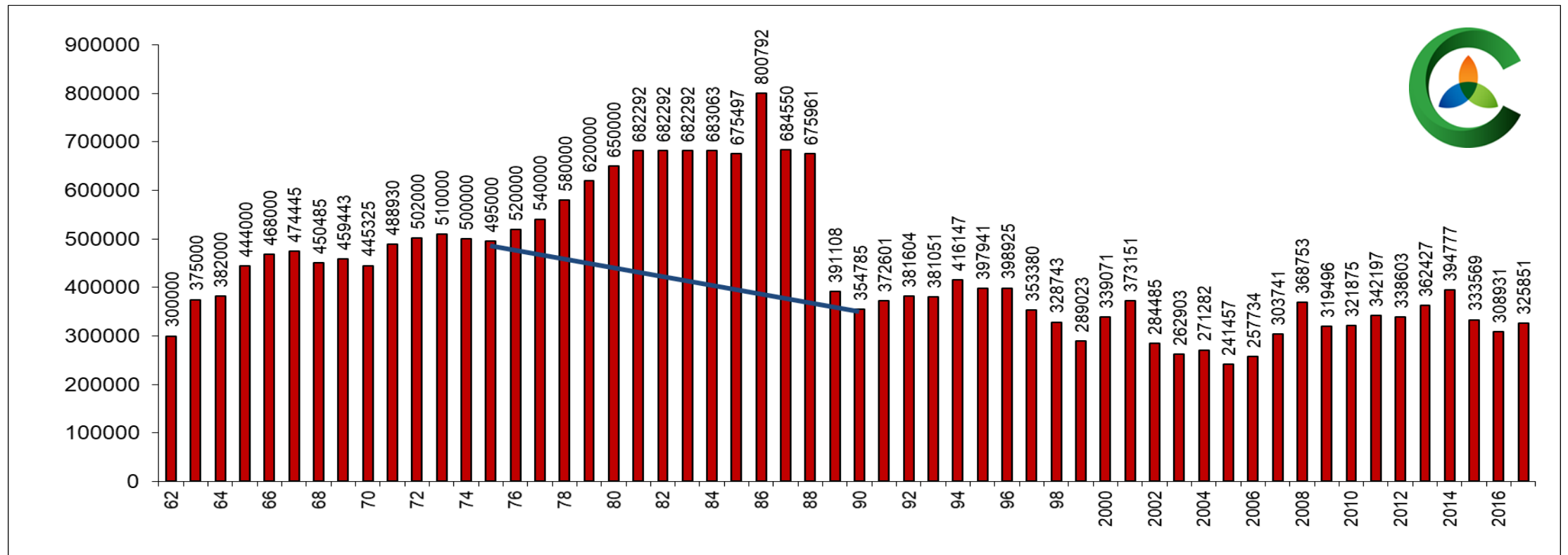
Lebanese civil servants *among whom there are some excellent elements*, are not alone to be blamed!

The Lebanese State entrusted the Reconstruction, and since 1992, had no:

- 1- **Social vision** for Lebanese Agriculture: “What Rural Society we want”?
- 2- **Economic vision** “What Economy is needed to develop this Rural Society”?
- 3- Consequently did not produce an “**Agriculture Framework Law**”
to be adopted and applied by all successive governments
- 4- Did not have a “**Medium Term Integrated Plan**” with projects by priority
- 5- Did not have an “**Agricultural Policy**” meant to control execution of the Plan

**MOREOVER, THE RECONSTRUCTION LEBANESE STATE
HAVING NO RELIABLE OFFICIAL DATA BASE, COMMON TO ALL OPERATORS,
THE EXECUTION OF AID PROJECTS BY THE INTERNATIONAL COMMUNITY WAS
AS CHAOTIC AS STERILE**

No wonder then, that the hundreds of projects conceived and financed by the International Community to help rebuild the Lebanese Agriculture, simply failed to reach its development target



With 231 major projects amounting to \$196 million, Euro 503 million and LL 167 billion, and executed in Lebanon since 1992, we would have expected a substantial impact on the Gross National Agricultural Product. Which is regrettably not at all the case!

AT THE LEVEL OF
FOREIGN NGOs

SO WHAT WENT WRONG AND LATELY BURST WITH THE GROWING NATIONAL FINANCIAL CRISIS?

At the level of **Foreign NGOs and Lebanese Civil Society**

NGOs: organizations independent of any government, usually non profit and active in humanitarian or social areas. Some may have political connotation

Foreign NGO intervention in Lebanese agriculture and rural communities, was initiated with 1975 war and fluctuated with intensity of world interest towards the Lebanese social and economic situation.

Major NGOs (World Vision, DAI, Land O Lake, Acidi Voca, IECD, AVSI, Order of Malta) and many other minor NGOs executed hundreds of development projects.

So why has global impact of NGO projects been so limited in the Agricultural and Rural sector?

Majority of individual projects were conceived independently of a wider regional or sectorial solid value chain vision. Thus limiting projects efficiency and even, in some cases, projects resulted with negative effects.

Heavy administrative procedures imposed by necessity of controlling local teams and expenses, delaying project execution and even sometimes stopping it

Often projects were sub contracted to unprofessional operators with improper execution

But foremost, absence of a coordinating body at the national level, that would have integrated all projects in a national plan for best coverage and maximum efficiency. An orphan attempt by PM Saad Hariri was quickly dropped.

In fact each NGO has been free to pick the field of action of its choice, in the region of its choice and to conceive and execute its project the way it considered best

No wonder that in absence of a wise and well informed and prepared national authority, coordinating and supervising NGO's projects, the huge amount of efforts, time and financing, invested by the NGOs, (several hundred million US dollars) did not reach a visible substantial development impact on the Agricultural sector and on the rural community

N.B. NGOs are ruled by a Lebanese law passed in the thirties of last century and which has not been reviewed since then. Their license is issued by the Ministry of Interior for national security aspects only

AT THE LEVEL
OF THE PRIVATE SECTOR

SO WHAT WENT WRONG AND LATELY BURST WITH THE GROWING NATIONAL FINANCIAL CRISIS?

At the level of the **private sector**

UPSTREAM

Commercial companies dealing with Agricultural Inputs, have been the **major stimulating factor in maintaining the Agricultural Sector** since war start in 1975

Doctor to diagnose, Pharmacist to deliver solutions, Hospital to attend emergencies, Bank to provide credit, **Ag Input companies did it all**

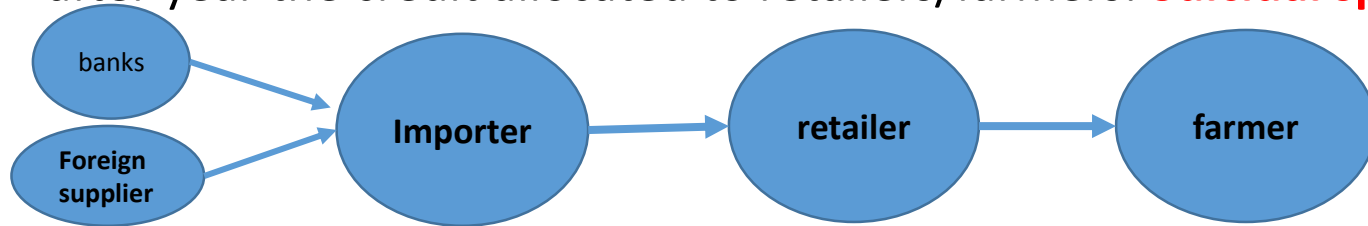
Acceptable but penalizing laws and regulations which did not apply to all operators, still allowed **fraud** which became common practice, but most serious and market disturbing, was the uncontrolled **smuggling of inputs** banned in Lebanon

It is regretful that the Ag input companies lacked cohesion and cooperation to avoid the disintegration of their profession and to get ready to face 2019 financial crisis.

This will lead to the loss of the main support to the agriculture sector

The 2019 financial crisis has put a tragic end to the Agricultural Credit suicidal spiral of Ag Input companies

Since the blooming spring promised by President Rafic Hariri in Fall 1992, the **cash sales market** that had regulated Ag input sales during 1975-1990 war, **turned into credit sales**. In absence of low interest Agricultural credit, importers provided input working capital to retailers and farmers. Farmers poor returns did not allow its total reimbursement, which dangerously increased year after year the credit allocated to retailers/farmers: **Suicidal spiral**



All Ag input sales being in US\$, we estimate In October 2019 at about \$80 million, the farmers' debt to retailers and at \$60 million, the retailers' debt to banks and importers.

Farmers badly hit by successive bad crop seasons, shall not be able to pay back retailers, while retailers shall be unable to pay the Importers who in turn shall be unable to honor their dues to banks and to foreign suppliers.

THE WHOLE FINANCING SYSTEM OF LEBANESE AGRICULTURE THAT WAS MAINLY SECURED BY IMPORTERS, HAS COLLAPSED



SO WHAT WENT WRONG AND LATELY BURST WITH THE GROWING NATIONAL FINANCIAL CRISIS?

At the level of the **private sector**

DOWNSTREAM

Domestic wholesale markets dealing on consignment basis, have always used Lebanese Lira, with deferred payment to farmers. Some also were a source of credit to farmers who paid back with their crops. 2019 financial crisis combined with banks blocking credit to wholesalers, created a liquidity vacuum with delayed payments to farmers (when it is not bankruptcy and non payment). This affects seriously the financial cycle of the Agrofood value chain.

Wholesale markets operating system, remains a major element of inefficiency and wastage in the agrofood chain

Export channels, literally destroyed by 1975 war, have never recovered and are the weakest ring of the chain,

while it should be – with industry exports - the major source of hard currency for Lebanon

THIS SHALL DANGEROUSLY IMPACT THE AGRICULTURE PRODUCTION CYCLE

Until the market moves to cash operations and adopts exclusively the Lebanese Lira, and until a steady hard currency policy is defined by the monetary authorities, enabling import of inputs at proper conditions, and export of Lebanese agricultural products to yield the highest returns,

We expect serious disturbances at all levels:

- Decrease in volume of produced crops
- Lower yields and quality
- Inefficient marketing
- But foremost: **Social unrest in the rural community and more rural exodus towards misery belts around Lebanese cities**

After this short genuine diagnosis of Lebanese Agriculture,
how does it look in figures?



**AGRICULTURAL PRODUCTION
DURING THE PAST FIVE YEARS 2015-2019
PROJECTION FOR THE 2019-2020 CAMPAIGN**



At CREAL, and since 1981, we have created and constantly improved a genuine model (PCIA) allowing a systematic yearly study of 127 crops and 15 animal productions all over the Lebanese territory.

Among CREAL data: the Gross National value of each crop (farmer's gate price)
Which consolidation results in the GNAP

In the following slides, we shall analyze the evolution of 2015-2019 GNAP
and estimate 2019-2020 campaign
according to elements in hand at mid campaign

**Although we have at this time of the year,
a clear picture of the situation of most inputs related to the 2019-2020 campaign,
our estimation of 2020 GNAP, assumes
that climatic conditions will be same as previous year
and that economic conditions between Jan 2020 and October 2020 shall not worsen**

Our estimations of 2020 campaign are based on following major crisis impacting facts



Total blockage of banking facilities to purchase inputs from abroad

this limited the availability of needed Ag. Inputs in quantity and on time

Drastic decrease in financial means of Ag Input importers

this limited their imports but mostly reduced to almost nil their credit to retailers/farmers

Quasi absence of credit to farmers by traditional sources

this deprived most farmers of their campaign working capital

Above will affect Areas planted, Yield, Quality and consequently, Farmer's Income

CREAL team estimated 2020 value of each crop according to:

- availability of inputs (seeds, fertilizers and pesticides),
- adopted cheaper fertilization programs and expected poor plant protection application
- very limited farmer's financial means.

For easy comparison, crop value is expressed in US\$, to which Leb Pd was indexed during previous years.

Considered exchange rate for 2020 as being LPD 2500 per US\$.



Groups and Families of crops as adopted by CREAL

- **Field crops** (Cereals, potato, legumes, onion, garlic, forage crops)
- **Fruit trees** (Citrus, Apples, Pears, Grapes, Banana, Apricots, peaches, almonds, cherries, persimmon)
- **Industrial crops** (Olives, Tobacco, Sugar beets)
- **Vegetables and Flowers** (open field and under cover)
- **Forest products**
- **Prohibited crops**



Prevision for 2020 year – Lebanese Agriculture Production

Estimation January 2020



Value of production (in US dollars)						Field Crops
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
13,400,000		36,900,000	38,500,000	28,500,000	34,250,000	Cereals
34,000,000	85,350,000	118,600,000	124,250,000	125,700,000	165,200,000	Potatoes
612,000	1,250,000	1,250,000	1,000,000	1000,000	1,250,000	Legumes
6,500,000		17,100,000	15,500,000	17,700,000	18,200,000	Onion
176,000	325,000	650,100	450,250	800,000	900,000	Garlic
3,250,000		6,000,000	7,280,000	8,500,000	7,350,000	Forage crops
300,000	557,000	380,000	247,000	150,000	160,000	Peanut
58,238,000		180,880,100	187,850,000	182,350,000	227,310,000	Total Field crops

2020 Field crops value is estimated to decrease by almost 70% compared to 2018 decrease is 64% for Cereals, 72% for Potato and 61% for Onions



Prevision for 2020 year – Lebanese Agriculture Production

Estimation January 2020



Value of production (in US dollars)						FRUIT TREES
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
32,000,500		54,450,000	46,150,000	48,950,000	57,650,000	citrus
57,900,000		112,000,000	77,950,000	44,750,000	64,750,000	apples
7,700,000	11,800,000	15,000,000	10,000,000	14,250,000	14,800,000	pears
53,000,500		103,500,000	74,300,000	77,800,000	90,400,000	grapes
72,500,000	127,000,000	47,900,000	39,150,000	51,400,000	59,750,000	bananas
10,700,000	17,900,000	11,550,000	10,450,000	11,200,000	16,950,000	banana under nets
2,250,000	3,500,000	4,200,000	2,900,000	4,200,000	3,550,000	apricots
3,700,000	4,800,000	6,800,800	7,450,000	7,550,000	10,400,000	almonds
12,700,000	19,700,000	24,500,000	14,950,000	16,700,000	9,550,000	cherries
10,300,000		20,000,000	12,000,000	16,500,000	13,300,000	peaches
2,600,000		5,100,000	3,800,000	3,250,000	3,750,000	plum
1,500,000		2,660,000	1,450,000	1,950,000	3,500,000	Persimmon (kaki)
6,950,000		13,600,000	16,950,000	13,950,000	13,250,000	Others
273,801,000		429,360,800	317,500,000	312,450,000	361,600,000	Total Fruit Trees

A 63% decrease in value of Fruit Trees 2020 production as compared to 2018



Value of production (in US dollars)						INDUSTRIAL CROPS
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
						Industrial Crops
61,200,000		135,400,000	113,000,000	93,700,000	94,300,000	Olive
37,440,000		62,400,000	70,000,000	62,600,000	64,650,000	Tobacco
0	0	0	0	0	0	Sugar Beet
98,640,000		197,800,000	181,650,000	156,300,000	158,950,000	Total Industrial Crops
An estimated decrease of 51% in 2020 Industrial crops value as compared to 2018 Decrease of 55% for olives and 40% for tobacco						



Value of production (in US dollars)						VEGETABLES & FLOWERS
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
						VEGETABLES AND FLOWERS
73,900,000		136,000,000	106,200,000	108,850,000	112,850,000	Open field vegetables
80,650,000		148,500,000	101,750,000	69,900,000	85,950,000	Green house vegetables
4,950,000		10,250,000	3,550,000	4,250,000	4,200,000	Open fields & Green house Flowers
159,500,000		294,750,000	211,500,000	183,000,000	203,000,000	Total Vegetables and Flowers
<p>Vegetables and flower 2020 crop value decrease is estimated at 44% as compared to 2018 Decrease of 44% for Open field and Green House vegetables and of 53% for flowers</p>						



Value of production (in US dollars)						FOREST AND PROHIBITED CROPS
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
4,350,000		7,200,000	3,720,000	2,500,000	6,150,000	Forest Products
7,600,000		12,450,000	15,800,000	19,250,000	12,800,000	Prohibited Crops
As compared to 2018, estimated decrease in Forest Products value for 2020, is 40% Decrease in prohibited crops value is 39%						





Prevision for 2020 year – Lebanese Agriculture Production

Estimation January 2020

Value of production (in US dollars)						Plant Production
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
58,238,000		180,880,100	187,850,000	182,350,000	227,310,000	Field crops
273,801,000		429,360,800	317,500,000	312,450,000	361,600,000	Fruit trees
98,640,000		197,800,000	181,650,000	156,300,000	158,950,000	Industrial crops
159,500,000		294,750,000	211,500,000	183,000,000	203,000,000	Vegetables and Flowers
4,350,000		7,200,000	3,720,000	2,500,000	6,150,000	Forest products
7,600,000		12,450,000	15,800,000	19,250,000	12,800,000	Prohibited crops
602,129,000		1,122,440,900	918,020,000	855,850,000	969,810,000	Total

CREAL estimates that Plant Production value will decrease in 2020 by 47% as compared to 2018



Groups of Animal Productions as adopted by CREAL

- ▀ Dairy Products
- ▀ Meat Products
- ▀ Poultry
- ▀ Fisheries
- ▀ Apiculture



Prevision for 2020 year – Lebanese Agriculture Production

Estimation January 2020

Value of production (in US dollars)						DAIRY PRODUCTS
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
						MILK production
102,800,000		165,000,000	157,850,000	112,750,000	87,050,000	Cow milk
8,580,000		11,000,000	11,300,000	15,500,000	16,050,000	Sheep milk
18,096,000		23,200,000	24,500,000	30,150,000	30,950,000	Goat milk
129,476,000		199,200,000	193,650,000	158,400,000	134,050,000	Total Dairy production
For 2020 CREAL estimates at 35% the decrease in value of Dairy products as compared to 2018						
						MEAT production
26,481,000		33,950,000	38,650,000	39,750,000	41,000,000	Beef meat
12,675,000		16,250,000	20,500,000	25,350,000	26,750,000	Lamb meat
15,015,000		19,250,000	24,550,000	29,850,000	37,650,000	Goat meat
4,290,000		5,500,000	4,550,000	4,250,000	4,200,000	Others
58,461,000		74,950,000	76,650,000	99,200,000	109,600,000	Total Meat Production
For 2020 CREAL estimates at 22% the decrease in value of Meat products as compared to 2018						



Prevision for 2020 year – Lebanese Agriculture Production

Estimation January 2020

Value of production (in US dollars)						Animal Production
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
294,000,000		380,000,000	399,500,000	398,100,000	425,100,000	POULTRY
106,000,000		136,650,000	46,400,000	72,700,000	75,650,000	FISHERIES
14,340,000		23,900,000	26,500,000	9,450,000	6,350,000	APICULTURE

CREAL estimates the 2020 decrease in value as compared to 2018

At 23% for POULTRY

23% for FISHERIES

40% for APICULTURE



Prevision for 2020 year – Lebanese Agriculture Production

Estimation January 2020

Value of production (in US dollars)						Animal Production
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
294,000,000		380,000,000	399,500,000	398,100,000	425,100,000	Poultry
129,476,000		199,200,000	193,650,000	158,400,000	134,050,000	Dairy products
58,461,000		71,200,000	76,650,000	99,200,000	109,600,000	Meat products
106,000,000		136,650,000	46,400,000	72,700,000	75,650,000	Fisheries
14,340,000		23,900,000	26,500,000	9,450,000	6,350,000	Apiculture
602,277,000		810,950,000	742,700,000	737,850,000	750,750,000	Total

CREAL estimates that Animal Production value will decrease in 2020 by 26% as compared to 2018



Value of Agriculture production (in US dollars)						
2020	2019	2018	2017	2016	2015	
(\$)	(\$)	(\$)	(\$)	(\$)	(\$)	
602,129,000		1,122,440,900	918,020,000	855,850,000	969,810,000	Total plant production
602,277,000		810,950,000	742,700,000	737,850,000	750,750,000	Total animal production
1,204,406,000		1,933,390,900	1,670,600,000	1,593,700,000	1,720,560,000	Grand total

CREAL estimates that Total Lebanese Agriculture Production value will decrease in 2020 by 38% as compared to 2018



CREAL previsions for the 2020 GNAP

based on assumptions as on January 2020 and on our hopes that situation will not worsen

Conclude to a decrease of 38% of the GNAP, as compared to 2018

47% for the plant production

26% for the animal production

**These drops over one year should be considered as extreme
and unless treated urgently,
could have a disastrous effect on the future of Lebanese Agriculture**

This still could be considered by wise and responsible authorities as an
opportunity to rebuild Lebanese Agriculture on modern sustainable grounds

**In spite of 50 years of ignorant leadership, there still are Lebanese
professionals who could participate in this national venture.
Remains how to build trust and motivation**

Most Lebanese are expecting solutions from any speaker addressing the crisis

A proper diagnosis represents 90% of the solution to any problem

**Remains the 10% action plan
with a realistic calendar based on available means**

This action plan should be divided in two:

- **An immediate emergency plan,**
to save whatever could be salvaged of 2020 Agricultural Campaign
- **A Medium term plan based upon**
 - * clear social options: what is the Rural society we want for a developed Lebanon
 - * subsequent economic options: what is the economic model most adapted to this rural society and to country's food security
 - * Medium term plan with integrated projects and a clear calendar framed by an "Agricultural Law" : the guideline to successive Ministries and administrations
 - * Agricultural policy: the guideline to the Ministries and administrations for coordinating and controlling the execution of the projects and assessing its impact

THIS REQUIRES A POLITICAL WILL AND PROFESSIONAL DEVOTED LEADERS

BUT THIS ALSO REQUIRES KNOWLEDGE

Lebanon that became a **beacon of culture and knowledge**

till the dreadful war that destroyed it, has suffered since the early seventies of a mounting level of **ignorance** accompanied by a growing insolent **pretention**, that marked the rulers of the reconstruction since 1992

حتى اصبحنا

بلد الجهل والتجاهل والتجهيل

A strong wake up is requested in the field of knowledge that will require a serious effort over several generations.

Education and Research are crucial missions that Lebanon Universities and Schools and Research Institutes will be invited to fulfill

IF WE DEFINE WHAT WE WANT
AND WHAT IS GOOD FOR OUR COUNTRY

IF WE HAVE THE **PROPER SOCIAL AND ECONOMIC OPTIONS**
BACKED BY A **MEDIUM TERM PLAN** WITH INTEGRATED PROJECTS
FRAMED BY AN **AGRICULTURAL LAW**
AND EXECUTED ACCORDING TO AN **AGRICULTURAL POLICY**

THEN TRUST CAN BE REBUILT

AND THEN, I CAN ASURE YOU THAT LEBANON WILL HAVE NO PROBLEM
SECURING THE PROPER SUPPORT OF ITS DIASPORA AND OF THE REST OF
THE WORLD TO SET THE COUNTRY ON THE TRACK OF DEVELOPMENT

Unless we admit that our country
has been for the past 50 years
on the track of underdevelopment
and has been exploited
by a limited cast of warlords and ruthless billionaires
while keeping a semblance of “culture and education”

We shall never be able to reverse the exploitation trend
and the increasing level of ignorance of our people
And never be able to build a developing country

Lebanon is a very genuine Land in the M-E

By its geographical position

By its climate

By its genuine population mix

**LEBANON HAS ALL TO SUCCEED ITS DEVELOPMENT
AND COME BACK AT THE FOREFRONT**

Due to its components, our country never reaches a point of no return

THUS IT IS NEVER TOO LATE TO START REBUILDING LEBANON

Let all wise, skilled and learned persons,
join hands to put Lebanon back on the development track,

**I believe that FAFS, a Faculty of one of the most prestigious National Institutions: AUB
has a major educational and scientific mission in rebuilding Lebanese Agriculture**

THANK YOU FOR YOUR ATTENTION
THE FLOOR IS OPEN TO QUESTIONS