GIEWS Country Brief
Lebanon

Reference Date: 03-October-2019

FOOD SECURITY SNAPSHOT
- Average cereal harvest gathered in 2019
- Cereal import requirements in 2019/20 expected to remain close to average
- Large number of Syrian refugees remains

Average 2019 cereal crop harvested
Harvesting of the 2019 winter barley and wheat crops was completed by July. Most of the 2020 winter cereals will be planted in November after seasonal autumn showers replenish soil moisture.

In 2019, total cereal production was estimated at about 176,000 tonnes, 7 percent above the 2018 harvest and similar to the five-year average due to favourable weather conditions. While domestic cereal production is limited by landscape, production of fruits and vegetables is important in terms of GDP contribution and employment. Although the agriculture sector employs only 11 percent of the total labour force at national level, it is a primary source of income and employment in rural areas where it reaches up to 25 percent of the labour force and 80 percent of the local GDP.

Average cereal import requirements in 2019/20
Domestic cereal production covers, on average, less than 20 percent of the consumption needs and the country depends heavily on imports. In the 2019/20 marketing year (July/June), the cereal import requirements, mainly wheat for human consumption and maize to feed livestock and poultry, are forecast at an average level of 2 million tonnes, similar to the previous year. The current import requirement is almost double of the quantities imported before the onset of the Syrian crisis in 2011 that led to increased numbers of refugees in the region. Wheat is sourced mostly from the Russian Federation and Ukraine.

In August 2019, the yearly general inflation was estimated at 1.2 percent, the lowest rate since October 2016. The decrease was supported mostly by a slowed price increase for food and non-alcoholic beverages, which in August 2019 increased only by 0.6 percent compared to one year earlier. The Consumer Protection Department of the Ministry of Economy and Trade subides the price of local flat bread, while prices of other bakery products (baguettes, sandwich bread, etc.) are set freely.
Large number of Syrian refugees remains

As of September 2019, about 930,000 Syrian refugees were registered in the country. Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the number of refugees registered in the country reached 1.18 million in May 2015. This number has been decreasing since then following the tightening of entry and residency rules for Syrian nationals since January 2015 and the start of slow-paced voluntary returns to the Syrian Arab Republic.

The Lebanon Crisis Response Plan (LCRP) 2017-2020 estimated that there are about 3.3 million people in need of assistance in the country, including 1.5 million vulnerable Lebanese, 1.5 million displaced Syrians (including not registered refugees) and 300,000 Palestinian refugees.

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Weather conditions favourable for 2019 winter grains development

Planting of the 2019 winter barley and wheat crops, which started in mid-October 2018, is about to be completed. Remote sensing earth observation information suggests the above average precipitation and weather conditions have been favourable for crop establishment and development.

In 2018, total cereal production was estimated at about 164 000 tonnes, similar to 2017 but about 7 percent below the five-year average. While domestic cereal production is limited by landscape, production of fruits and vegetables is important in terms of GDP contribution and employment. Out of a total agricultural area of 332 000 hectares, 230 000 hectares are cultivated and about half of this area is irrigated. The agricultural sector employs only 8 percent of the total labour force, but it is a primary source of income and employment in rural areas where it reaches up to 25 percent of the labour force and 80 percent of the local GDP.

Above-average cereal import requirements in 2018/19

Domestic cereal production covers, on average, about 17 percent of the consumption needs and the country depends heavily on imports. In the 2018/19 marketing year (July/June), the cereal import requirements, mainly wheat for human consumption and maize to feed livestock and poultry, are forecast at 2 million tonnes, about 200 000 tonnes below the previous year, but 15 percent above the average of the last five years. Above-average import requirements are in part supported by higher food consumption, particularly of wheat, due to population growth.

In November 2018, the yearly general inflation was 5.8 percent, while the food and non-alcoholic beverages inflation was 6.7 percent, up from over 4 percent in spring 2018 supported by
higher commodity prices. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread, while other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

**Lebanese response plan to Syrian refugee crisis**

As of December 2018, almost 1 million Syrian refugees were registered with UNHCR in the country, the same figure as in January 2016. Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into the country steadily increased until January 2015 when the Government revised the entry and residency rules for Syrian nationals.

The Lebanon Crisis Response Plan (LCRP) 2017-2020 estimated that there are about 3.3 million people in need of assistance in the country, including 1.5 million vulnerable Lebanese, 1.5 million displaced Syrians (many not registered) and 300,000 Palestinian refugees.

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Current conditions unfavourable for 2018 winter grains development

Planting of the 2018 winter barley and wheat, which started in mid-October 2017, is about to be completed. Early autumn dryness was not eased by relatively low precipitation in December. At the moment, conditions for crop establishment and development remain unfavourable and the lack of precipitation in the near future is likely to constrain yields.

In 2017, total cereal production was estimated at about 164 000 tonnes, 6 percent below the harvest of the previous year and the five-year average. While domestic cereal production is limited by landscape, production of fruits and vegetables is important in terms of GDP contribution and employment. Out of a total agricultural area of 332 000 hectares, 230 000 are cultivated. Some 113 000 hectares are irrigated. The agricultural sector employs only 6 percent of the total labour force, but it is a primary source of income and employment especially in rural areas where it reaches up to 25 percent of the labour force and 80 percent of the local GDP.

Cereal import requirement remains stable in 2017/18

Domestic cereal production covers, on average, about 17 percent of the consumption needs and the country depends heavily on imports. In the 2017/18 marketing year (July/June), the cereal import requirements, mainly wheat for human consumption and maize for livestock and poultry, are forecast at 1.8 million tonnes, marginally above the previous year, but 25 percent above the average of the last five years. Increased import requirements are in part supported by higher food consumption caused by population increases.
In November 2017, the yearly general inflation was 4.8 percent, while the food and non-alcoholic beverages inflation was 4.2 percent, down from over 5 percent in spring 2017, but up from the negative levels recorded in 2015 and 2016 supported by higher commodity prices. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

Lebanese response plan to Syrian refugee crisis

As of November 2017, almost 1 million Syrian refugees were registered with UNHCR in the country, the same figure as in January 2016. Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon steadily increased until January 2015 when the Government introduced the new entry and residency rules for Syrian nationals. These rules were in addition to the rules on work permits in the sectors where the Syrian nationals have long been working, such as agriculture and construction.

The Lebanon Crisis Response Plan (LCRP) 2017-2020 estimated that there are 3.3 million people in need of assistance in the country, including 1.5 million vulnerable Lebanese, 1.5 million displaced Syrians (many not registered) and 300 000 Palestinian refugees.

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**FOOD SECURITY SNAPSHOT**

- Slightly below average cereal harvest forecast in 2017
- Cereal import requirements in 2017/18 set to remain stable
- Number of registered Syrian refugees in country stabilized

**Slightly below average cereal harvest forecast**

Harvesting of the 2017 winter barley, which started in mid-May, is about to be completed. Harvesting of the 2017 winter wheat crop started in early June and will continue until mid-August.

Remote sensing data shows that accumulated estimated precipitation so far in 2017 fell short of that of 2016 in all agricultural areas except Liban Sud. In the most agriculturally productive Beqaa Valley growing mostly fruits, vegetables and potatoes, the accumulated precipitation remained below the long-term average (1989-2012).

In 2017, total cereal production is forecast at about 164 000 tonnes, 6 percent below the harvest of the previous year and the five-year average. While domestic cereal production is limited by landscape, agricultural production, particularly fruits and vegetables, it is important in terms of GDP contribution and employment. Out of a total agricultural area of 332 000 hectares, 230 000 are cultivated. Some 113 000 hectares are irrigated. The agricultural sector employs only 6 percent of the total labour force, but it is a primary source of income and employment especially in rural areas where it reaches up to 25 percent of the labour force and 80 percent of the local GDP.

The Syrian crisis disrupted trade routes to the countries of the Gulf Cooperation Council (GCC) and Iraq, drastically impacting Lebanese exports of agricultural products to these lucrative markets. Exports of fresh produce (mainly fruits and potatoes), are particularly affected. The closure of the last border crossing between the Syrian Arab Republic and Jordan in March 2015 forced Lebanese exporters to rely on the more expensive seas shipment, resulting in a dramatic increase in transport costs and a significant loss of market shares, particularly in the Gulf and Iraqi markets.
Cereal import requirement remains high in 2017/18

Domestic cereal production covers on average about 17 percent of the consumption needs and the country depends heavily on imports. In the 2017/18 marketing year (July/June), the cereal import requirements, mainly wheat for human consumption and maize for livestock and poultry, are forecast at 1.6 million tonnes, slightly below the previous year, but 20 percent above the average of the last five years. Increased import requirements are in part supported by higher food consumption caused by population increases.

In May 2017, the yearly general inflation was 4.3 percent, while the food and non-alcoholic beverages inflation was 5.3 percent, up from the negative levels recorded since 2015 supported by higher commodity prices. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

**Lebanese response plan to Syrian refugee crisis**

As of June 2017, over 1 million Syrian refugees were registered with UNHCR in the country, the same figure as in January 2016. Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon steadily increased until January 2015 when the Government introduced the new entry and residency rules for Syrian nationals, in addition to the new rules on work permits in the sectors where Syrian nationals have long been working, such as agriculture and construction.

In November 2016, the Lebanon Crisis Response Plan (LCRP) 2017-2020 estimated that there are 3.3 million people in need of assistance in the country, including 1.5 million vulnerable Lebanese, 1.5 million displaced Syrians (many not registered) and 300 000 Palestinian refugees.

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GIEWS Country Brief
Lebanon

Reference Date: 07-December-2016

**FOOD SECURITY SNAPSHOT**
- Relatively favourable weather conditions prevail
- Cereal import requirements in 2016/17 set to decrease slightly
- Number of registered Syrian refugees in the country stabilized

**Relatively favourable production prospects prevail**

Planting of the 2017 winter grains (for harvest from approximately mid-June next year) started in mid-October and is expected to continue until early January. Remote sensing data shows that cumulative precipitation so far in 2016 exceeded or was close to the long-term average (1989-2012). Rainfall amounts from September to the end of November were exceptionally low. However, heavy precipitation in early December have brought rainfall levels closer to last year’s in most areas. Before the latest rains, the current deficits were very visible in some of the most agriculturally productive parts of Beqaa Valley although additional abundant precipitation later in the season can reverse the impact.

In 2016, total cereal production was estimated at about 174 000 tonnes, similar to the previous year and the five-year average. While domestic cereal production is limited by landscape, agricultural production, particularly fruits and vegetables, is important in terms of GDP contribution and employment. Out of a total agricultural area of 332 000 hectares, 230 000 are cultivated. Some 113 000 hectares are irrigated. The agricultural sector employs 6 percent of the total labour force but is a primary source of income and employment in rural areas reaching up to 25 percent of the labour force and 80 percent of local GDP in rural districts.

The Syrian crisis disrupted trade routes to the countries of the Gulf Cooperation Council (GCC) and Iraq, drastically impacting Lebanese exports of agricultural products to these lucrative markets. Exports of fresh produce (mainly fruits and potatoes) are particularly affected. The closure of the last border crossing between the Syrian Arab Republic and Jordan in March 2015 forced Lebanese exporters to rely on the more expensive seas shipment, resulting in a dramatic increase in transport costs and a significant loss of market shares, particularly in the Gulf and Iraqi markets.

**Lebanon Crop calendar**

<table>
<thead>
<tr>
<th>Month</th>
<th>Barley</th>
<th>Wheat*</th>
</tr>
</thead>
<tbody>
<tr>
<td>J</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
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<td></td>
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<td>M</td>
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</tbody>
</table>

Sowing | Growing | Harvesting
Source: FAO/GIEWS

**Lebanon Cereal production**

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>000 tonnes</td>
<td>percent</td>
<td></td>
</tr>
<tr>
<td>Wheat</td>
<td>137</td>
<td>140</td>
</tr>
<tr>
<td>Barley</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>Maize</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Others</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Total</td>
<td>174</td>
<td>177</td>
</tr>
</tbody>
</table>

Note: percentage change calculated from unrounded data.
Cereal import requirement remains high in 2016/17

Domestic cereal production covers on average about 17 percent of the consumption needs and the country depends heavily on imports. In the 2016/17 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 1.6 million tonnes, slightly below the previous year but 20 percent above the average of the last five years. Increased import requirements are in part supported by higher food consumption caused by population increases.

In October 2016, the yearly general inflation was 1.13 percent, while the food and non-alcoholic beverages inflation was negative 1.6 percent. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

Lebanese response plan to Syrian refugee crisis

As of September 2016, 1.07 million Syrian refugees were registered with UNHCR in the country, the same figure as in January 2016. Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon steadily increased until January 2015 when the Government introduced the new entry and residency rules for Syrian nationals, in addition to the new rules on work permits in the sectors where Syrian nationals have long been working, such as agriculture and construction. Currently, the signing of the “pledge not to work” has been lifted.

In 2016, the Lebanon Crisis Response Plan (LCRP) estimated that there are 3.3 million people in need of assistance in the country, including 1.5 million vulnerable Lebanese, 1.5 million displaced Syrians and 300 000 Palestinian refugees. The Food Security Sector (FSS) was able to reach more than 870 000 individuals with direct food assistance (cash based, vouchers and in-kind), agricultural livelihoods activities (including capacity building and provision of agricultural inputs and materials) and nutrition-related activities mainly through micro-gardening. The sector supported national institutions, mainly the Ministry of Agriculture and Ministry of Social Affairs with capacity building and systems improvement.

In November 2016, the LCRP 2017-2020, the Lebanon chapter for the Regional Refugee and Resilience Plan strategy, was finalized. The FSS identified a total of 2 million people in need, of which 70 percent refugees. The sector will target around 1 million individuals, of which 85 percent refugees (Syrians and Palestinians) with direct food assistance and employment activities, and host communities with direct food assistance, agricultural livelihoods and employment support. With the objective of shifting the response from humanitarian to more stabilization efforts, the sector overall budget needs have been set to USD 507.2 million for 2017 (68 percent humanitarian and 32 percent stabilization), an increase from USD 473.5 million in 2016 (74 percent humanitarian and 26 percent stabilization).
Relatively favourable production prospects prevail

Planting of the 2016 winter grains for harvest from approximately mid-June concluded in early January. Planting of sorghum normally starts in mid-April.

Remote sensing data shows that cumulative precipitation so far in 2016 exceeded or was close to the long-term average (1989-2012) in all districts except Hermel and Zahle in Beqaa Province where the difference was 10 and 26 percent, respectively. However, compared to the same period in 2015, some districts across the country experienced deficits up to 25 percent, while others received up to 50 percent more precipitation than in 2015. The deficits are most prominent in some of the most agriculturally productive parts of Beqaa Valley. Up to early March 2016, the NDVI developments in 2016 appeared to be closely mirroring that of 2015 and the historical average. Abnormally warm temperatures prevailed across the region possibly speeding up crop development.

In 2015, total cereal production was estimated at about 177 000 tonnes, similar to the previous year and the five-year average. While domestic cereal production is limited by landscape, agricultural production, particularly fruits and vegetables, is important. Out of a total agricultural area of 332 000 hectares, 230 000 are cultivated. Some 113 000 hectares are irrigated. The agricultural sector employs 6 percent of the total labour force but is a primary source of income and employment in rural areas reaching up to 25 percent of the labour force and 80 percent of local GDP in rural districts.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with the closure of the last border crossing between the Syrian Arab Republic and Jordan in March 2015. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products. Some farmers near the border with the Syrian Arab Republic report that security concerns have prevented them from accessing their fields and orchards.

Cereal import requirement remains high in 2015/16

Domestic cereal production covers on average about 17 percent of the consumption needs and the country depends heavily on imports. In the 2015/16 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 1.1 million tonnes, slightly above the previous year.
In February 2016, the yearly general inflation was negative 2 percent, while the food and non-alcoholic beverages inflation was less than 1 percent. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

**New entry and residency rules put break on number of Syrian refugees**

Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon steadily increased. As of January 2016, 1.07 million Syrian refugees were registered with UNHCR in the country. As of early May 2015, UNHCR-Lebanon suspended registration based on the Government of Lebanon (GoL)’s instructions. In January 2015, the GoL introduced new entry and residency rules for Syrian nationals, in addition to the new rules on work permits in sectors where Syrian nationals have long been working, such as agriculture and construction.

The Lebanon Crisis Response plan estimates that there are 3.3 million people in need of assistance in the country, including 1.5 million vulnerable Lebanese, 1.5 million displaced Syrians and 300 000 Palestine refugees.

The Food Security Sector, a coordination body of food security activities in Lebanon covering the Syrian crisis, led by WFP, FAO, Ministry of Agriculture, Ministry of Social Affairs and an NGO (currently Action Contre La Faim - ACF), has provided food assistance through various modalities, including in-kind food distribution as well as vouchers (paper vouchers, e-cards and ATM cards) to around 990 000 recipients (maximum number reached in March 2015), including Lebanese, Syrian and Palestinian refugees in Lebanon and Palestinian refugees from the Syrian Arab Republic.

In addition, the Sector vaccinated more than 700 000 animals (including cattle and small ruminants), benefiting more than 5 000 farmers. More than 1 700 individuals received various technical trainings on agriculture and were provided with materials and inputs.
**FOOD SECURITY SNAPSHOT**

- Favourable weather conditions prevail; average crop estimated
- Cereal import requirements in 2015/16 set to increase slightly
- New entry and residency rules put break on number of Syrian refugees

**Average cereal crop harvested in 2015**

Harvesting of the 2015 winter grains concluded in August while sowing of the 2016 wheat crop is about to start. Cumulative precipitation in all provinces exceeded that of last year as well as the long-term average (1989-2012), creating satisfactory conditions for crop development.

In 2015, total cereal production is estimated at about 177 000 tonnes, similar to the previous year and the five-year average.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with the closure of the last border crossing between Syria and Jordan in March 2015. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products. Some farmers near the border with the Syrian Arab Republic report that security concerns have prevented them from accessing their fields and orchards.

**Cereal import requirement remains high in 2015/16**

Domestic cereal production covers on average about 17 percent of the consumption needs and the country depends heavily on imports. In the 2015/16 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 1.1 million tonnes, slightly above the previous year.

In August 2015, the general inflation was negative 4.6 percent, while the food and non-alcoholic beverages inflation was negative 1 percent (beginning from January 2014, the base year for CPI was changed to December 2013). The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

**New entry and residency rules put break on number of Syrian refugees**

Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased. As of September 2015, 1.08 million Syrian refugees were registered with UNHCR in the country. As of early May 2015, UNHCR Lebanon suspended registration based on the Government of Lebanon (GoL)’s instructions. In January 2015, the GoL introduced new entry and
residency rules for Syrian nationals, in addition to the new rules on work permits in sectors where Syrian nationals have long been working in such as agriculture and construction.

The Food Security Sector, a coordination body of food security activities in Lebanon covering the Syria crisis, led by WFP, FAO, Ministry of Agriculture, Ministry of Social Affairs and an NGO (currently Action Contre La Faim - ACF), has provided food assistance through various modalities, including in-kind food distribution as well as vouchers (paper vouchers, e-cards and ATM cards) to around 990,000 recipients (maximum number reached in March 2015) including Lebanese, Syrian refugees, Palestine refugees in Lebanon and Palestine refugees from Syria.

In addition, the Sector vaccinated more than 700,000 animals (including cattle and small ruminants) benefiting more than 5,000 farmers. More than 1,700 individuals received various technical trainings on agriculture and were provided with materials and inputs.
FOOD SECURITY SNAPSHOT
- Favourable weather conditions prevail; average crop expected
- Cereal import requirements in 2014/15 set to increase
- New entry and residency rules put break on number of Syrian refugees

Generally favourable conditions for 2015 cereal crops
Harvesting of the 2015 winter grains is scheduled to start in mid-June. Timely and satisfactory rains provided sufficient moisture for crops. Cumulative precipitation by the first decade of May 2015 in all provinces exceeded that of last year as well as the long-term average (1989-2012). Vegetation conditions as captured by the satellite-based Normalized Difference Vegetation Index (NDVI) suggest a good development of winter crops. Overall, an average cereal harvest is tentatively forecast in 2015.

In 2014, total cereal production is estimated at about 177 000 tonnes, similar to the previous year and the five-year average.

Concerns about sustainability and efficiency of water use in agriculture are prevalent and arise regularly.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with occasional border closings. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products.

Cereal import requirement remains high in 2014/15
Domestic cereal production covers on average about 17 percent of the consumption needs and the country depends heavily on imports. In the 2014/15 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 995 000 tonnes, slightly above the previous year.

In March 2015, general inflation was 1 percent, while the food and non-alcoholic beverages inflation was negative 1 percent (beginning from January 2014, the base year for CPI was changed to December 2013). The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

New entry and residency rules put break on number of Syrian refugees
Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, as of early May 2015, almost 1.2 million Syrian refugees are registered in the country. In January 2015, the Lebanese Government decided to introduce new entry and residency rules for Syrian nationals.
The WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq and Turkey. The Operation in Lebanon should reach about 970 000 beneficiaries (including Lebanese returnees) with in-kind food distributions and voucher assistance by December 2015.
**GIEWS Country Brief**

**Lebanon**

Reference Date: 31-March-2015

**FOOD SECURITY SNAPSHOT**
- Planting of 2015 winter cereal crop concluded in January; average crop expected
- Cereal import requirements in 2014/15 set to increase
- Estimated number of Syrian refugees in need of humanitarian assistance continues to increase

**Generally favourable conditions for 2015 cereal crops**

Planting of the 2014/15 winter season cereals, for harvest from June, concluded in January and that of sorghum is about to start. Cumulative precipitation by the second decade of March 2015 in all provinces exceeds that of last year as well as the long-term average (1989-2012). Vegetation conditions as captured by the satellite-based Normalized Difference Vegetation Index (NDVI) suggest a good establishment of winter crops. The far eastern part of the Nabatieh and most southern part of Beqaa provinces, an area mostly used for grazing, is currently showing slightly below-average NDVI. Overall, an average cereal harvest is tentatively forecast in 2015.

In 2014, total cereal production is estimated at about 177 000 tonnes, similar to the previous year and the five-year average.

Concerns about sustainability and efficiency of water use in agriculture are prevalent and arise regularly.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with occasional closings. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products.

**Cereal import requirement remains high in 2014/15**

Domestic cereal production covers on average about 17 percent of consumption needs and the country depends heavily on imports. In the 2014/15 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 995 000 tonnes, slightly above the previous year.

In February 2015, general inflation as well as food and non-alcoholic beverages inflation was almost flat at about 0.1 percent month-on-month (beginning from January 2014, the base year for CPI was changed to December 2013). The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc.) are not subsidized.

**Humanitarian needs increase with the growing number of Syrian refugees**

Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, as of late March 2015, almost 1.2 million Syrian refugees are

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**GIEWS** global information and early warning system on food and agriculture
registered in the country.

The WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq and Turkey. The operation in Lebanon should reach about 970,000 beneficiaries (including Lebanese returnees) with in-kind food distributions and voucher assistance by December 2015.
Reference Date: 11-November-2014

FOOD SECURITY SNAPSHOT

- Wheat output in 2014 put at average level
- Cereal import requirements in 2014/15 set to increase
- Estimated number of Syrian refugees in need of humanitarian assistance continues to increase

Planting of the 2014/15 winter season cereals, for harvest from June, is ongoing. Normally, the wheat harvest is concluded in August, while that of sorghum in October. Weather conditions in the region have so far been generally favourable.

Concerns about sustainability and efficiency of water use in agriculture are prevalent and arise regularly.

Average cereal crop harvested in 2014

Total cereal production in 2014 is tentatively put at about 177 000 tonnes, similar to last year and the five-year average.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with occasional closings. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products.

Cereal import requirement remains high in 2014/15

Domestic cereal production covers on average about 17 percent of consumption needs and the country depends heavily on imports. In the 2014/15 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 995 000 tonnes, slightly above last year.

In September 2014, general inflation was about negative 0.2 percent month-on-month (in January 2014, the base year for CPI was changed to December 2013). Food inflation in the same period reached 0.8 percent. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc) are not subsidized.

Humanitarian needs increase with the growing number of Syrian refugees

Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, as of early November 2014, over 1.12 million Syrian refugees are registered in the country, with additional 8 000 awaiting registration.

The WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq and Turkey. The operation in Lebanon should reach about 1.2 million beneficiaries (including Lebanese returnees) with in-kind food distributions and voucher assistance by December 2014.
GIEWS Country Brief
Lebanon

Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOTT
- Wheat output in 2013 at average level
- Cereal import requirements in 2013/14 set at a high level
- Estimated number of Syrian refugees in need of humanitarian assistance continues to increase

Planting of the 2014 winter cereals is almost concluded. Weather conditions in the region have been generally favourable, although some persisting dryness in parts raised concern about moisture conditions.

Average cereal crop harvested in 2013
Total cereal production in 2013 is tentatively put at about 179 000 tonnes, similar to last year.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with occasional closings. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products.

Cereal import requirement remains high in 2013/14
Domestic cereal production covers on average about 17 percent of consumption needs and the country depends heavily on imports. In 2013/14 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 896 000 tonnes, the same as last year.

In December 2013, general inflation reached about 1 percent year-on-year. Food inflation in the same period reached 3 percent. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc) are not subsidized.

Humanitarian needs increase with the growing number of Syrian refugees
Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, as of early January 2014, over 830 000 Syrian refugees are registered in the country, with additional 190 000 awaiting registration. The WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq, and Turkey. The operation in Lebanon should reach about 1.2 million beneficiaries (including Lebanese returnees) with in-kind food distributions and voucher assistance by December 2014.
Average cereal harvest forecast in 2013
Harvesting of the 2013 winter cereals (mainly wheat) is almost concluded. Weather conditions in the region have been generally favourable, although harsh winter storms and consequent floods in January 2013 destroyed some crops and fruit trees. Total cereal production in 2013 is forecast at about 179 000 tonnes, the same as last year.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties due to the continuing conflict in the Syrian Arab Republic that disrupted land routes with occasional closings. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products.

Cereal import requirement remains high in 2013/14
Domestic cereal production covers on average about 17 percent of consumption needs and the country depends heavily on imports. In 2013/14 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 896 000 tonnes, the same as last year.

The CPI data for Lebanon were not published between January 2013 and May 2013. In June 2013, general inflation reached almost 9 percent year-on-year (compared to 2 percent in June 2012). Food inflation, in the meantime, eased from 5.7 percent in June 2012 to 3 percent in June 2013. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc) are not subsidized.

Humanitarian needs increase with the growing number of Syrian refugees
Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, as of early August 2013, over 560 000 Syrian refugees are registered in the country, with additional 100 000 awaiting registration. The Lebanese government estimates that around 1 million Syrians are in the country. The WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq, and Turkey. The operation in Lebanon should reach about 420 000 beneficiaries (including Lebanese returnees) with in-kind food distributions and voucher assistance by December 2013.
FOOD SECURITY SNAPSHOT

- Wheat output in 2012 forecast at an above average level
- Cereal import requirements in 2012/13 set at a high level
- Estimated number of Syrian refugees in need of humanitarian assistance continues to increase

Planting of the 2013 winter cereals (mainly wheat) is about to start under generally normal weather conditions. In September 2012 new agricultural funding program was approved by the government, announcing sugar beet subsidies in Bekaa Valley, in order to divert farmers from producing illegal crops, as well as fodder subsidies for dairy farmers. An Agricultural Disaster Fund is also being developed.

Above average 2012 cereal production

Generally favourable weather conditions, with above average rains between January and March 2012 in main crop producing areas of the central Bekaa Valley and North Lebanon, contributed to an above average harvest. Total cereal production in 2012 is forecast at about 190 000 tonnes, about 20 percent above the previous year that was affected by dry weather conditions.

Lebanese exporters of horticultural products, fruits in particular, are experiencing difficulties as continuing conflict in Syria disrupted land routes resulting in occasional closings. An alternative marine transportation is costlier but also unsuitable for a variety of highly perishable products.

Cereal import requirement remains high in 2012/13

Domestic cereal production covers on average about 17 percent of consumption needs and the country depends heavily on imports. In 2012/13 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 896 000 tonnes, roughly the same as last year.

Like many countries in the region, during the 2011/12 fiscal year, Lebanon’s purchases were dominated by Black Sea origin wheat. However, the position of the exportable surplus in the region may alter geographic composition of suppliers.

Although, in the past, food inflation was consistently higher than general inflation, the pattern reversed in July 2012. General inflation increased from 2 percent in June 2012 (year-on-year) to over 10 percent in September. Food inflation, in the meantime, stabilised at around 6 percent. The Consumer Protection Department at the Ministry of Economy and Trade sets the price of local Lebanese flat bread. Other bakery products (baguettes, sandwich bread, etc) are not subsidised. In April 2012, bakers demanded compensation from the Government for the increased cost of raw materials used in bread production. Consequently, the Government decreased the weight of subsidised bread from 1 000 to 900 grams, keeping the price per package constant.

Growing population of Syrian refugees in need of
humanitarian assistance
Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, currently, an estimated 100,000 Syrian refugees are found in the country. The WFP continues providing food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq, and Turkey. The operation in Lebanon should reach about 40,000 beneficiaries with in-kind food distributions and voucher assistance by December 2012.
Good outlook for 2012 cereal production

Harvesting of the 2012 winter wheat and barley crops is expected to start from June. Weather conditions have been generally favourable, with above average rains between January and March in main crop producing areas of the central Bekaa Valley and North Lebanon. Total cereal production in 2012 is forecast at an above average level of about 190 000 tonnes, about 20 percent above the previous year that was affected by dry weather conditions.

Cereal import requirement remains high in 2011/12

Domestic cereal production covers only an average of about 20 percent of consumption needs and the country depends heavily on imports. In 2011/12 marketing year (July/June), the cereal import requirement, mainly wheat for human consumption and maize for livestock and poultry, is forecast at 886 000 tonnes, about 6 percent above the average of the last five years.

Food inflation, which increased in the second semester of 2011, stabilised in early 2012. In 2011, the average food inflation rate was 5.7 percent, slightly lower than in 2010 when it was estimated at 7.0 percent. In 2011, inflation in the food sector was consistently higher than general inflation by an average of 3 percent.

Growing population of Syrian refugees in need of humanitarian assistance

Since the beginning of the civil unrest in the Syrian Arab Republic in March 2011, the influx of refugees into Lebanon has steadily increased and, currently, an estimated 20 000 Syrian refugees are found in the country. Most of the refugees are in north Lebanon, with over 9 000 people in the Akkar region and in the border area of Wadi Khaled, plus about 3 000 people in Tripoli and 7 500 people in the Bekaa Valley. Two-thirds of the registered Syrians are women and children, with just over 50 percent under the age of 18, the refugees largely rely on the hospitality of economically distressed local communities and the humanitarian assistance (including food, shelter, health and education) provided by international organizations, NGOs and local municipalities.
Reference Date: 14-September-2011

**FOOD SECURITY SNAPSHOT**
- Wheat output estimated at below average level
- Cereal import requirements in 2011/12 set at high level

**Below average 2011 wheat crop expected**
Harvesting of the 2011 winter crops is almost completed and the early estimates of production indicate a below average crop, mainly due to reduced yields following an outbreak of yellow rust affecting wheat crops.

**Cereal import requirement is forecast to increase in 2011/12**
Domestic cereal production covers only an average of about 20 percent of consumption needs and the country depends heavily on imports. The cereal import requirement, mainly wheat for human consumption, in 2011/12 (July/June) is forecast at 866 000 tonnes, about 6 percent above last five years average, following the reduction in domestic production.
FOOD SECURITY SNAPSHOT
- Good rains improve prospects for 2011 crops
- Winter wheat production in 2010 affected by yellow rust.
- Cereal import requirements in 2010/11 set at high level.

Prospects for the 2011 winter crops improved following beneficial rainfall in March and April that boosted soil moisture for the wheat and barley crops to be harvested from June 2011.

Reduced 2010 wheat production due to rust attack
Aggregate production of the 2010 cereal crops is estimated at 134 000 tonnes, about 18 percent below the last five years average. The poor performance was mainly due to reduced yields following the outbreak of a new and virulent strain of yellow rust.

Cereal import requirements expected to reach record high levels in 2010/11
Domestic cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal import requirement, mainly wheat, in 2010/11 (July/June) is forecast at high level of 846 000 tonnes, about 5 percent above last five years average, following the reduction in domestic production.
Prospects for the 2011 winter crops improved following beneficial rainfall in March and April that boosted soil moisture for the wheat and barley crops to be harvested from June 2011.

Reduced 2010 wheat production due to rust attack
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Cereal import requirements expected to reach record high levels in 2010/11
Domestic cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal import requirement, mainly wheat, in 2010/11 (July/June) is forecast at high level of 846 000 tonnes, about 5 percent above last five years average, following the reduction in domestic production.
Reduced 2010 wheat production due to rust attack

Planting of 2011 winter wheat and barley crops has just been completed and their harvest is expected to start from June.

Aggregate production of the 2010 cereal crops is estimated at 134,000 tonnes, about 18 percent below the last five years average. The poor performance was due to reduced yields following the outbreak of a new and virulent strain of yellow rust.

Cereal import requirements expected to reach record high levels in 2010/11

National cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal import requirement, mainly wheat, in 2010/11 (July/June) is forecast at a record high level of 850,000 tonnes, following the reduction in domestic production. The recent political unease in Lebanon is a cause for concern and requires close monitoring of the food situation.
Command: GIEWS Country Brief

Lebanon

Reference Date: 13-October-2010

**FOOD SECURITY SNAPSHOT**
- Winter wheat production in 2010 affected by yellow rust.
- Cereal import requirements in 2010/11 set at record high level.

**Downward revision of the 2010 wheat production forecast due to rust attack**
Planting of 2011 winter cereal crops is about to start with the arrival of first seasonal rains.

Aggregate production of the 2010 winter wheat and barley crops, harvested from last June, is estimated at 134 000 tonnes, about 18 percent below the last five years average. The poor performance was due to reduced yields following the outbreak of a new and virulent strain of yellow rust.

**Cereal import requirements expected to reach record high levels in 2010/11**
National cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal import requirements, mainly wheat, in 2010/11 (July/June) are forecast at a record high level of 850 000 tonnes, following the reduction in domestic production.

### Lebanon

#### Crop calendar

<table>
<thead>
<tr>
<th>Sowing</th>
<th>Growing</th>
<th>Harvesting</th>
</tr>
</thead>
<tbody>
<tr>
<td>J F M</td>
<td>M A J</td>
<td>J J A S O N D</td>
</tr>
</tbody>
</table>

*Source: FAO/GIEWS*

#### Cereal production

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Wheat</td>
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<td>130</td>
<td>100</td>
</tr>
<tr>
<td>Barley</td>
<td>26</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>Maize</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Others</td>
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<td>1</td>
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</tr>
<tr>
<td>Total</td>
<td>164</td>
<td>164</td>
<td>134</td>
</tr>
</tbody>
</table>

Note: Percentage change calculated from unrounded data. *Source: FAO/GIEWS Country Cereal Balance Sheets*

#### Total cereal imports

- 2005/06-2009/10: 808 000 tonnes
- 2009/10: 820 000 tonnes
- 2010/11 forecast: 850 000 tonnes

Note: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years. *Source: FAO/GIEWS Country Cereal Balance Sheets*
FOOD SECURITY SNAPSHOT
- 2010 winter wheat production affected by yellow rust.
- Cereal import requirements in 2010/11 set at record level.

Downward revision of 2010 wheat production forecast due to rust attack
Harvesting of the 2010 winter wheat and barley crops has just been completed. Early good forecast of wheat production has been revised down by about 30 percent, due to reduced yields following an infestation of yellow rust. In fact, although weather conditions were very favourable, with above normal rainfall and temperatures, they also provided an excellent environment for the outbreak of a new and virulent strain of yellow rust. Aggregate cereal production in 2010 is therefore put at 134 000 tonnes, about 18 percent below the last five years’ average.

Cereal import requirements expected at record levels in 2010/11
National cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal import requirements, mainly wheat, in 2010/11 (July/June) are early forecast at a high of 850 000 tonnes, following the reduction in local production.
**FOOD SECURITY SNAPSHOT**
- Weather conditions favour 2010 winter cereal production.
- A steady cereal import position is forecast for 2009/10.

**Good prospects for 2010 cereal production**
Harvesting of the 2010 winter wheat and barley crops has just started and production is expected to be average. Weather conditions have been generally favourable, with beneficial rains between January and the beginning of March. Precipitations ended in April, about four weeks earlier than usual, increasing irrigation requirements for late-filling grain crops and accelerating crop maturation and dry down. Early estimate of total cereal production in 2010 is put at an average level of 163,000 tonnes.

**Cereal imports in 2009/10 forecast at same levels as the previous year.**
National cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal imports (mainly wheat) for 2009/10 (July/June) are estimated at some 820,000 tonnes, similar to last year but slightly higher than the previous five years average.
Good outlook of 2010 cereal production
Harvesting of the 2010 winter wheat and barley crops is expected to start from June. Weather conditions have been generally favourable, with above average temperatures and beneficial rains between January and the beginning of March.

Total cereal production in 2009 is estimated at average level of 165 000 tonnes.

Cereal imports in 2009/10 forecast at same levels as the previous year.
National cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal imports (mainly wheat) for 2009/10 (July/June) are estimated at some 820 000 tonnes, similar to last year but slightly higher than the previous five years average.
GIEWS Country Brief
Lebanon

Reference Date: 01-February-2010

FOOD SECURITY SNAPSHOT
- Cereal production and imports remain at average levels

Average cereal production in 2009
Total cereal production in 2009 is estimated at an average level of 165,000 tonnes. National cereal production covers only about 20 percent of consumption needs and the country depends heavily on imports. The cereal imports (mainly wheat) for 2009/10 (July/June) are estimated at some 820,000 tonnes.

Crop calendar
Lebanon

Key
Sowing
Growing
Harvesting

Source: FAO/GIEWS

Lebanon
Cereal production

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Wheat</td>
<td>135</td>
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<td>Maize</td>
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</tr>
<tr>
<td>Others</td>
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<tr>
<td>Total</td>
<td>167</td>
<td>149</td>
<td>165</td>
<td>11</td>
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</table>

Note: percentage change calculated from unrounded data.

Total cereal imports

<table>
<thead>
<tr>
<th></th>
<th>2004/05-2008/09 average</th>
<th>2008/09</th>
<th>2009/10 forecast</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>800</td>
<td>620</td>
<td>620</td>
</tr>
</tbody>
</table>

Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets