



INVESTMENT DEVELOPMENT
AUTHORITY OF **LEBANON**

Presidency of the Council of Ministers

INVESTMENT OPPORTUNITIES IN THE AGRO FOOD SECTOR 2016



investinlebanon.gov.lb

HEADLINES

I. SECTOR OVERVIEW

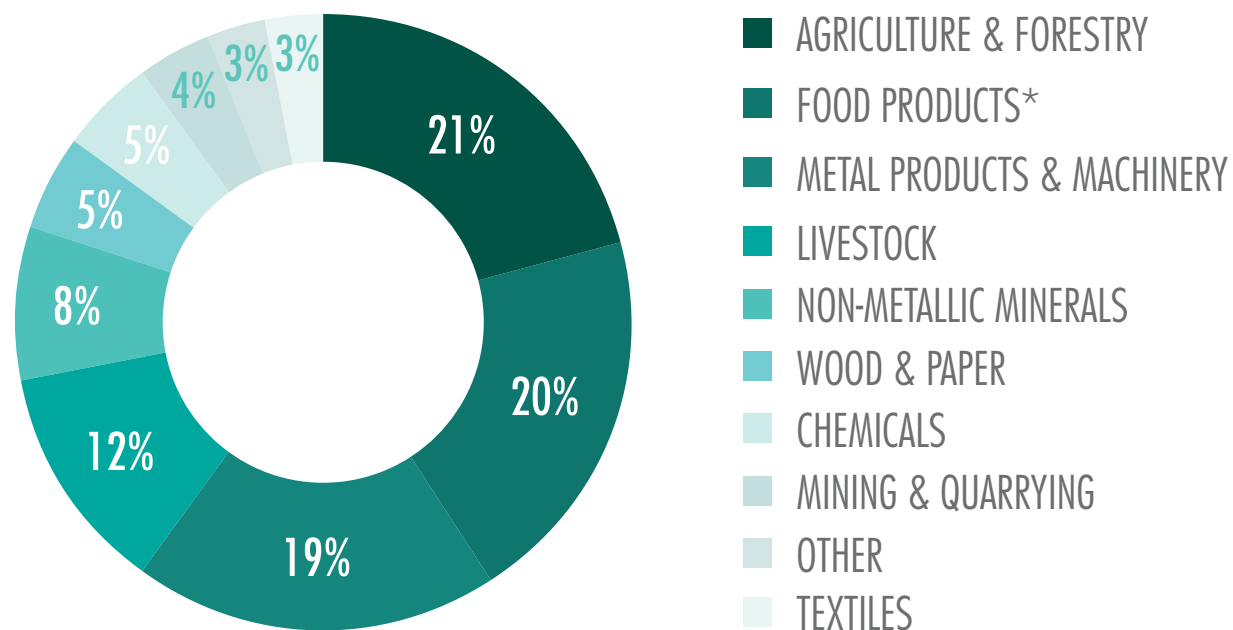
2. COMPETITIVE ADVANTAGES

3. INVESTMENT OPPORTUNITIES

4. ABOUT IDAL

LEBANON'S AGRO – FOOD SECTOR IS THE LARGEST INDUSTRIAL SUB SECTOR WHICH CONTRIBUTES TO AROUND 20% OF THE SECTOR'S VALUE ADDED...

DISTRIBUTION OF TOTAL INDUSTRIAL CONTRIBUTION TO GDP, 2013*



*Latest available data

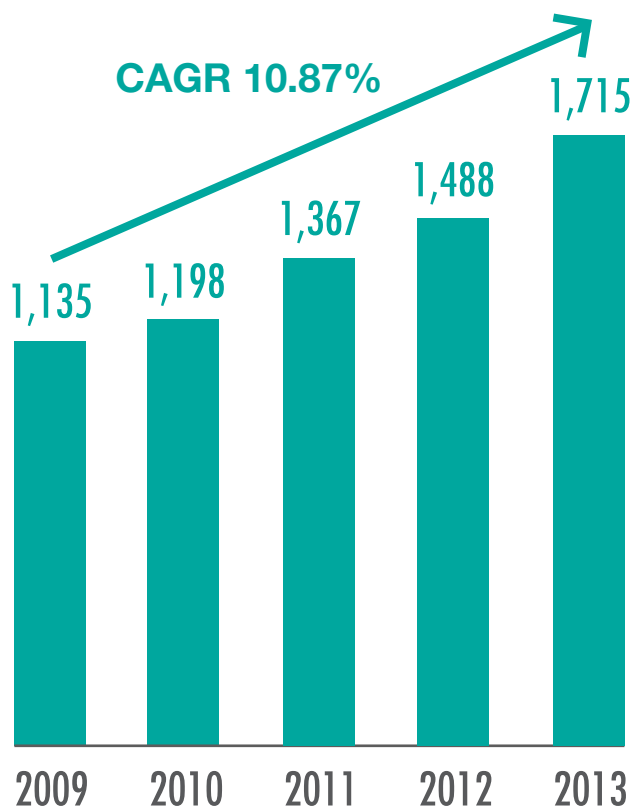
*Includes the manufacturing of food products, beverages, and tobacco

Source: Lebanese National Accounts, 2013

Source: The Lebanese Industrial Sector Facts and Findings 2007, published by the Ministry of Industry in 2010

...AND HAS BEEN INCREASING AT A CAGR OF 10.87% FROM 2009 TILL 2013

CONTRIBUTION OF AGRO FOOD SECTOR TO GDP (LBP BILLIONS) | 2009-2013*



*Latest available data

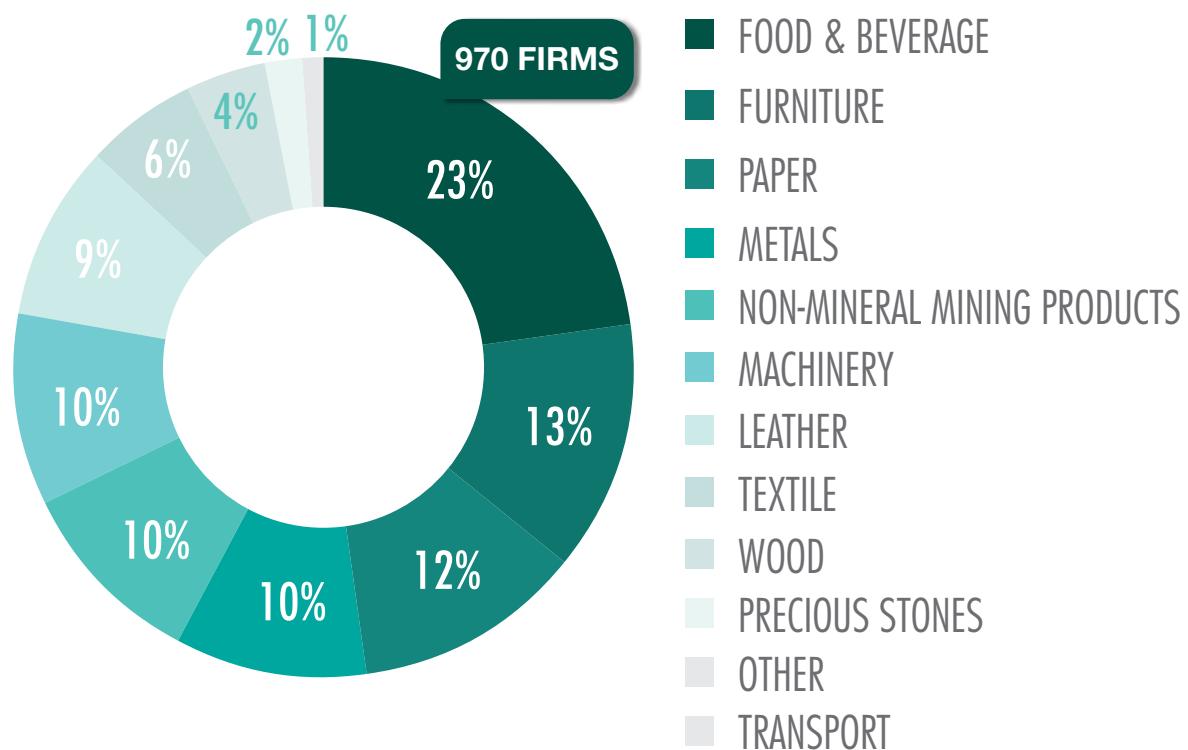
*Includes the manufacturing of food products, beverages, and tobacco

Source: Lebanese National Accounts, 2013

Source: The Lebanese Industrial Sector Facts and Findings 2007, published by the Ministry of Industry in 2010

THE SECTOR COMPRISES THE LARGEST SHARE OF INDUSTRIAL ESTABLISHMENTS, THE MAJORITY OF WHICH ARE LOCATED IN MOUNT LEBANON

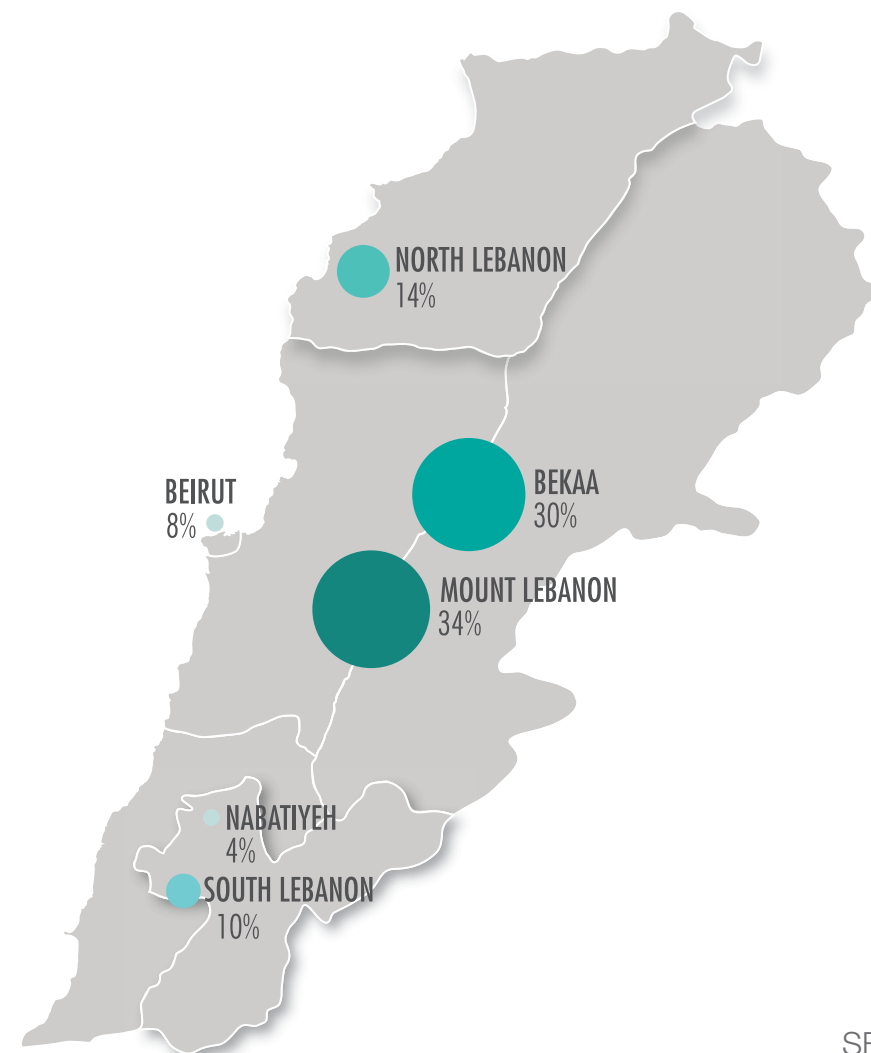
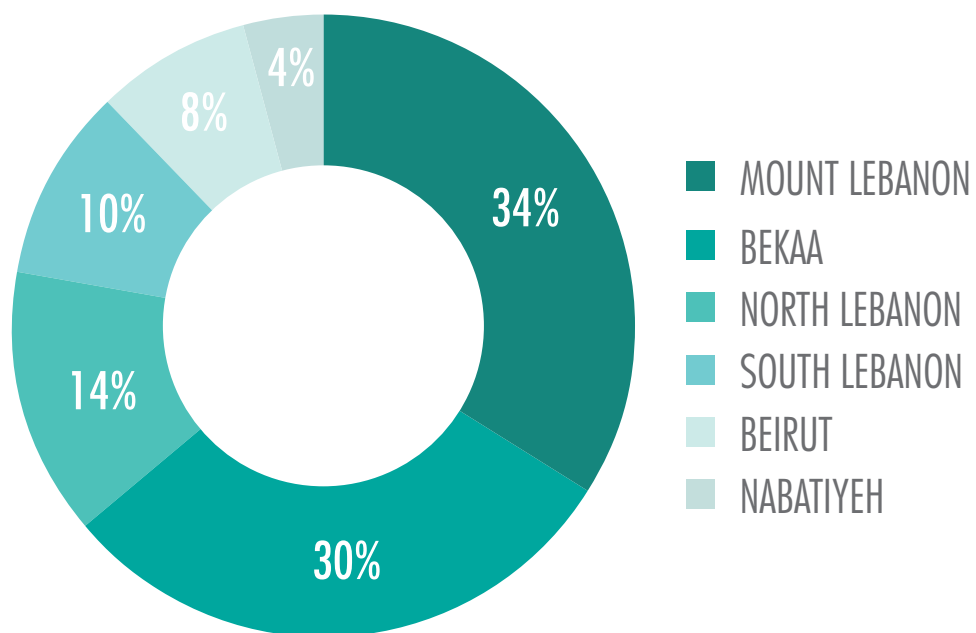
DISTRIBUTION OF FIRMS AMONG INDUSTRY SECTORS | 2015



Source: The Directory of Exports & Industrial Firms in Lebanon, 2015-2016

...AND COMPRISES THE LARGEST SHARE OF INDUSTRIAL ESTABLISHMENTS, THE MAJORITY OF WHICH ARE LOCATED IN MOUNT LEBANON

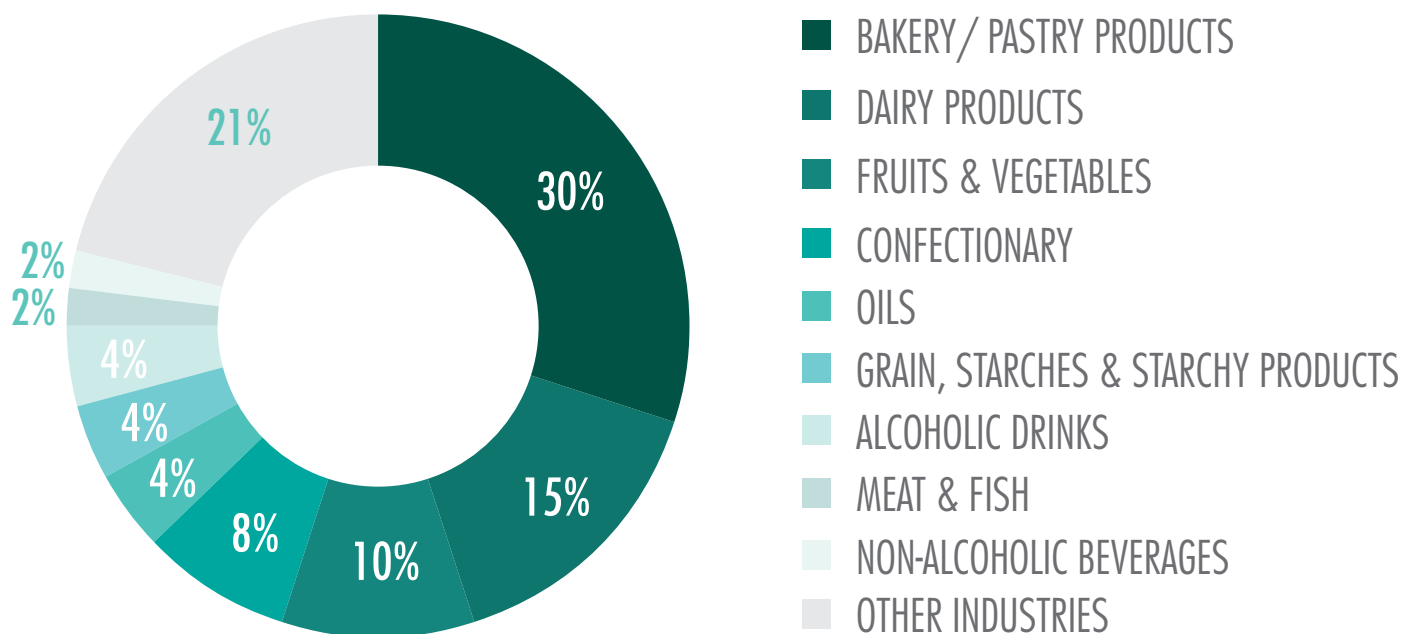
DISTRIBUTION OF AGRO FOOD ESTABLISHMENTS BY REGION | 2015



Source: The Directory of Exports & Industrial Firms in Lebanon, 2015-2016

...55% OF THESE ENTERPRISES ARE INVOLVED IN THE PRODUCTION OF BAKERY PRODUCTS, MILK AND DAIRY PRODUCTS, AND PRESERVED FRUITS AND VEGETABLES...

DISTRIBUTION OF AGRO-FOOD ENTERPRISES IN LEBANON BY TYPE OF PRODUCTION | 2007*



*Latest available figures

Source: Lebanon Industrial Sector Survey, 2007

Source: Lebanese Customs

...IN ADDITION TO MANY KEY INTERNATIONAL AGRO-FOOD COMPANIES THAT SET UP THEIR BUSINESSES IN LEBANON

PEPSI



Country of Origin: **USA**

No. of Employees in Lebanon: **850**

COCA-COLA



Country of Origin: **USA**

No. of Employees in Lebanon: **850**

JAPAN TOBACCO INTERNATIONAL



Country of Origin: **Switzerland**

No. of Employees in Lebanon: **95**

BEL



Country of Origin: **France**

No. of Employees in Lebanon: **50**

NESTLE



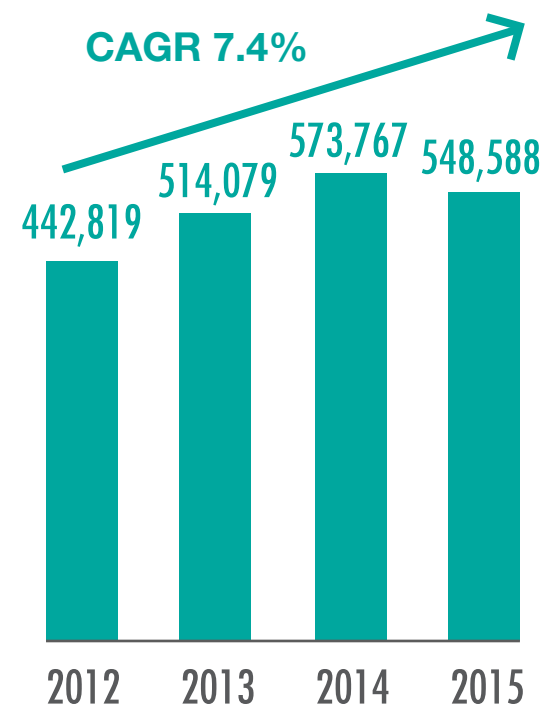
Country of Origin: **France**

No. of Employees in Lebanon: **249**

THE SECTOR BENEFITS FROM A STRONG COUNTRY BRAND AWARENESS AND GROWING REGIONAL MARKETS FOR LEBANESE AGRO-FOOD PRODUCTS

► **Agro-food exports** increased at a **CAGR of 7.4%** from 2012 to 2015 and accounted for 18.6% of total Lebanese exports in 2015.

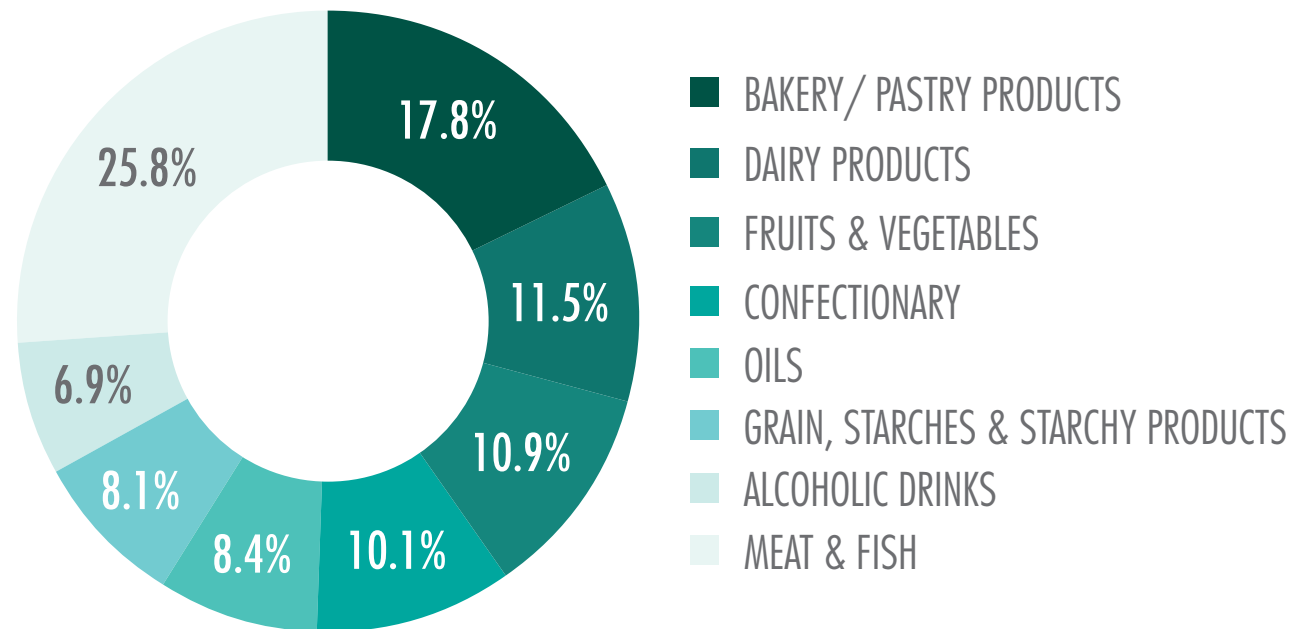
LEBANESE AGRO-FOOD EXPORTS (IN THOUSAND USD | 2015)



Source: Lebanese Customs

...MAINLY FOR PREPARED VEGETABLES, FRUITS AND NUTS (18%)
FOLLOWED BY BEVERAGES (12%)

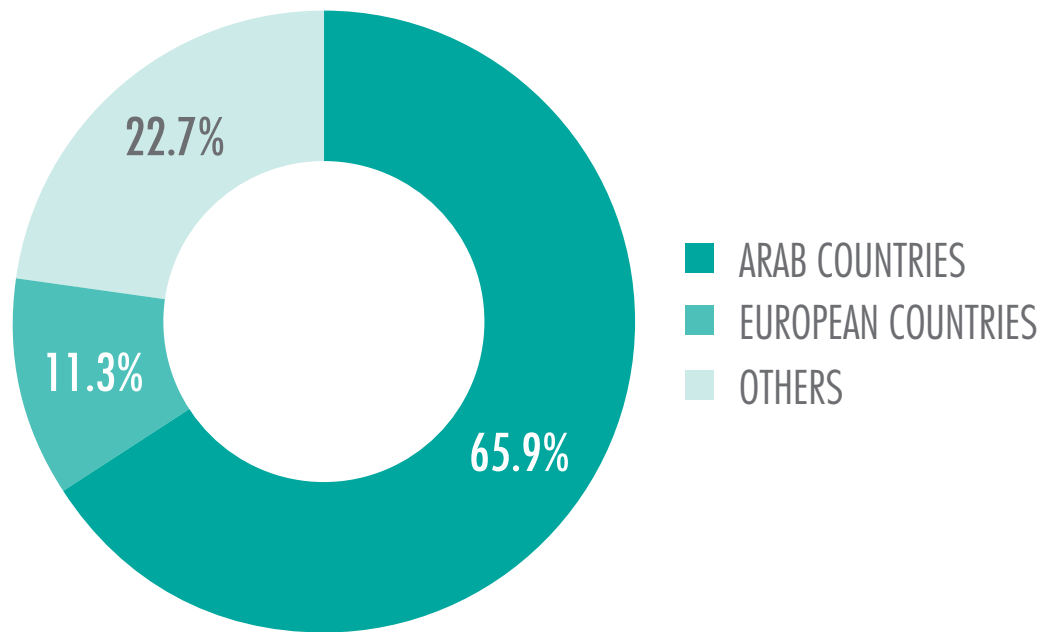
AGRO-FOOD EXPORT COMPOSITION (%SHARE | 2015)



Source: Lebanese Customs

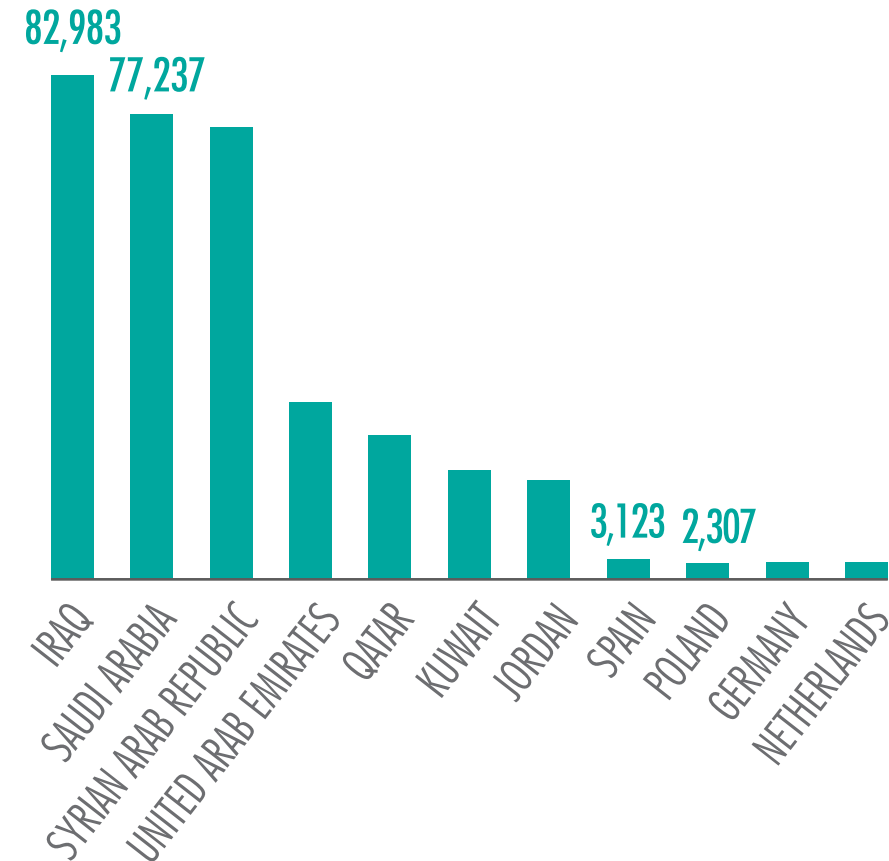
...WITH THE LARGEST SHARE DESTINED TO ARAB COUNTRIES (IRAQ AND KSA) AND TO EUROPEAN COUNTRIES (SPAIN AND POLAND)

AGRO-FOOD EXPORT DESTINATION (%SHARE | 2015)



Source: Lebanese Customs

AGRO-FOOD EXPORT DESTINATION (IN THOUSAND USD | 2015)



HEADLINES

1. SECTOR OVERVIEW

2. COMPETITIVE ADVANTAGES

3. INVESTMENT OPPORTUNITIES

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THE SECTOR'S STRENGTHS RESIDE IN THE PHYSICAL AND HUMAN RESOURCES AVAILABLE FOR THE PRODUCTION OF COMPETITIVE AGRO-FOOD PRODUCTS...

- ▶ **Availability of physical resources** as climate diversity, soil fertility, and the abundance of water resources.
- ▶ **Availability of well trained workforce:** many universities (AUB, Lebanese University, USJ and Balamand) offer agriculture and food industry study programs that serve the agro-food supply chain. In addition to the presence of a vocational school specialized in food industry.

► SALARY SCALE IN THE LEBANESE FMCG INDUSTRY

POSITION	FRESH GRADUATE	1 YEAR	2 YEARS	3 YEARS	5 YEARS	7 YEARS	10 YEARS	15 YEARS	20 YEARS
GENERAL MANAGER	PRIOR MANAGEMENT EXPERIENCE REQUIRED						\$6,000- \$7,000	\$7,000- \$10,000	\$10,000- \$12,000
MARKETING MANAGER	PRIOR MARKETING EXPERIENCE REQUIRED			\$2,200- \$2,300	\$2,300- \$2,500	\$2,500- \$3,000	\$3,000- \$3,500	\$3,500- \$4,200	\$4,200- \$4,800
SALES MANAGER	PRIOR SALES EXPERIENCE REQUIRED				\$2,200- \$2,800	\$2,800- \$3,100	\$3,100- \$3,600	\$3,600- \$4,400	\$4,400- \$5,500
BRAND MANAGER	PRIOR PRODUCT KNOWLEDGE EXPERIENCE REQUIRED			\$1,400- \$1,900	\$1,900- \$2,000	\$2,000- \$2,300	\$2,300- \$2,500	\$2,500- \$2,900	\$2,900- \$3,800
PURCHASING MANAGER	PRIOR EXPERIENCE REQUIRED				\$2,300- \$2,500	\$2,500- \$2,700	\$2,700- \$3,000	\$3,000- \$3,400	\$3,400- \$4,100
WAREHOUSE MANAGER	PRIOR EXPERIENCE REQUIRED				\$2,100- \$2,400	\$2,400- \$2,600	\$2,600- \$2,800	\$2,800- \$3,000	\$3,000- \$3,600
DISTRIBUTION MANAGER	PRIOR DISTRIBUTION EXPERIENCE REQUIRED				\$1,500- \$1,600	\$1,600- \$1,700	\$1,700- \$2,200	\$2,200- \$2,600	\$2,600- \$3,100
ACCOUNTANT	\$750- \$800	\$850- \$900	\$900- \$1,000	\$1,000- \$1,100	\$1,100- \$1,300	PROMOTED TO CHIEF ACCOUNTANT			
SECRETARY	\$650- \$750	\$750- \$800	\$800- \$850	\$850- \$900	\$900- \$1,000	\$1,000- \$1,100	\$1,100- \$1,300	\$1,300- \$1,500	\$1,500- \$1,800

Source: Info Pro Databank – Salary Scale 2012

IN ADDITION TO THE FINANCIAL AND TECHNICAL SUPPORT PROVIDED BY THE LEBANESE GOVERNMENT

FINANCIAL SUPPORT:

► **Kafalat** provides guarantees for loans (up to USD 400,000) granted by commercial banks to SMEs in the agro food sector.

► IDAL

► provides a 100% exemption from corporate income and project dividends taxes for up to 10 years

► provides through “Agro Map” program exporters with the opportunity to market their products in international fairs and introduce local producers to latest technology in the sector.

► **Economic and Social Development Fund:** program funded by EU and the Lebanese Government provides loans (up to USD 50,000) for SMEs in the agro food sector.

TECHNICAL SUPPORT:

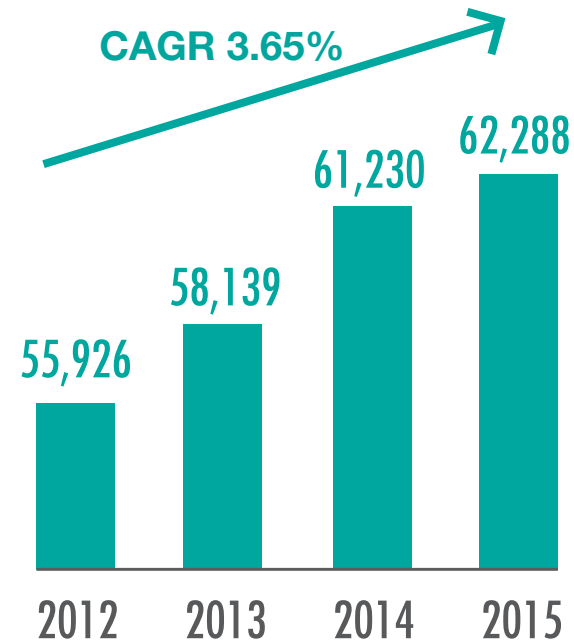
► Availability of testing and R&D institutions such as LARI, the Agricultural Research Institute of Lebanon which is a governmental organization under Minister of Agriculture Supervision that has eight experimental stations and conducts applied and basic scientific research for the development and advancement of the agricultural sector in Lebanon.

IN ADDITION TO THE RATIFICATION OF SEVERAL BILATERAL AND MULTILATERAL TRADE AGREEMENTS

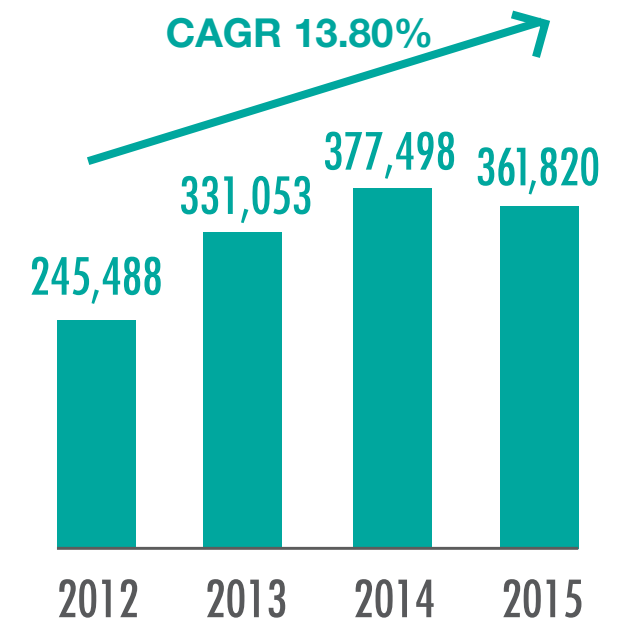
► Lebanon is a member of the **Greater Arab Free Trade Area** (GAFTA), the **Euro-Med Partnership** as well the **European Free Trade Area** (EFTA) which have had a positive impact on the improved access to markets for Lebanese exports in external markets.

► The Lebanese food products' exports to EU and Arab countries have been increasing steadily at a **CAGR of 3.65% and 13.80% respectively from 2012 to 2015.**

LEBANESE FOOD PRODUCTS EXPORTS TO EU (IN THOUSAND USD | 2012-2015)



LEBANESE AGRO FOOD EXPORTS TO ARAB COUNTRIES (IN THOUSAND USD | 2015)



Source: Lebanese Customs

HEADLINES

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**THE
DIVERSIFICATION
OF THE LEBANESE
AGRO-FOOD
SECTOR RESULTS
IN A NUMBER
OF INVESTMENT
OPPORTUNITIES IN
KEY SUB SECTORS.**

	SUB-SECTOR	OPPORTUNITIES
1	OLIVE OIL	There are increased opportunities for olive oil production; Lebanon's diverse topography, fertile soil, microclimates, and olive varieties allow farmers to produce uniquely flavored products.
2	DAIRY PRODUCTS	The dairy sector in Lebanon is still in the infancy stage but there is a great potential for growth opportunity view the availability of farming locations and (Bekaa and North Lebanon) and the increasing demand for dairy products.
3	NUTS & DRIED FRUITS	One of the leading exporting agro food sub-sector in Lebanon; exports of dried fruits and nuts have been increasing at a CAGR of 8.5% during the period of 2012-2014.
4	WINE	The sub-sector has an estimated size of USD 41 million encompasses 40 wineries that produces around 8.5 million bottles annually.
5	PROCESSED FOOD	Almond, Coconut and soymilk have recently entered the Lebanese market and are taking share from dairy milk market view their superior nutritional benefits.

INVESTMENT OPPORTUNITY: OLIVE OIL

- ▶ Around 570 km² of land is occupied by olive trees, which accounts for **5.4%** of the Lebanese territory, or **8% of total agricultural lands in Lebanon**.
- ▶ Olive groves are grown in six major regions extending from North to South: Batroun, Koura, Zgharta, Akkar, Rashaya El Foukhar, and Hasbaya, in addition to several other subordinate areas.
- ▶ Lebanon has about 544 registered oil mills distributed throughout its regions.
- ▶ The oil productivity of the olives in Lebanon ranges from **18-25%**.

DISTRIBUTION OF OLIVE
OIL MILLS BY REGION
(NUMBER OF MILLS |
2015)



Source: The Directory
of Exports & Individual
firms, 2015-2016

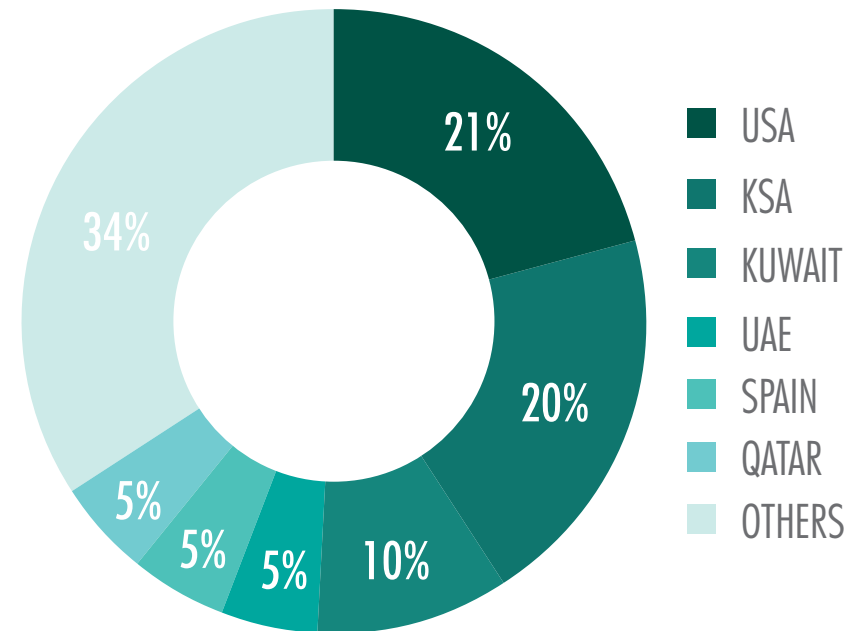
INVESTMENT OPPORTUNITY: OLIVE OIL

► **Olive oil** is amongst the most prominent Lebanese signature agro-industrial products and it is gaining more ground on both domestic and international markets view its quality and competitive price; in 2015 olive oil exports reached \$25.7 M. in 2015, an increase of 27% from 2014 levels.

► There are growth opportunities in the production of extra virgin olive oil from new varieties of olive such as Barnea (Senolia), Frantoio and other olive varieties obtained through new breeding techniques.

► The flavored olive oils with different herbs and spices are becoming popular and represents a good investment opportunity in the Lebanese market.

TOP DESTINATIONS TO LEBANESE OLIVE OIL EXPORTS (%SHARE | 2015)



Source: Lebanese Customs

INVESTMENT OPPORTUNITIES: DAIRY PRODUCTS

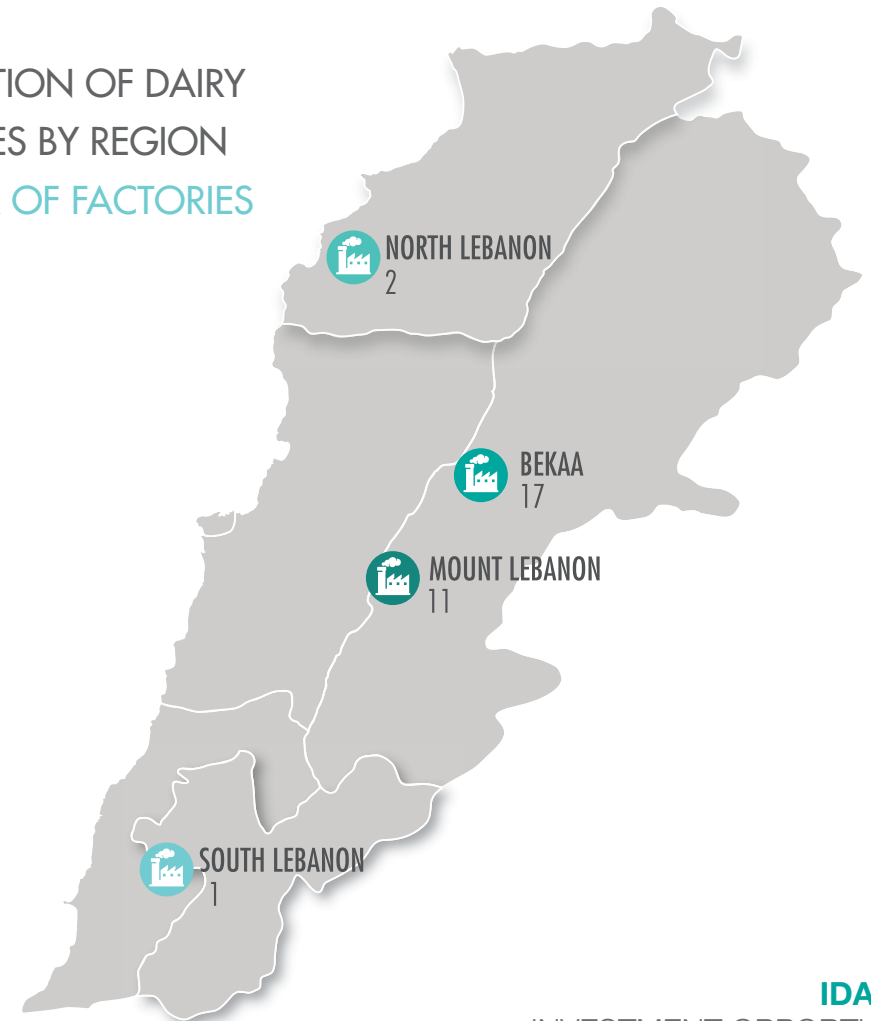
- ▶ The sector is dominated by a **large number of SMEs with Liban Lait biggest dairy firm** in addition to other Dairy Khoury & Co, Skaff Dairy, Jaber & Sons, Taanayel les fermes and Hawa Dairy.



- ▶ There are around **31 dairy factories** in Lebanon concentrated in Bekaa & Mount Lebanon.

Source: The Directory of Exports & Individual firms, 2015-2016

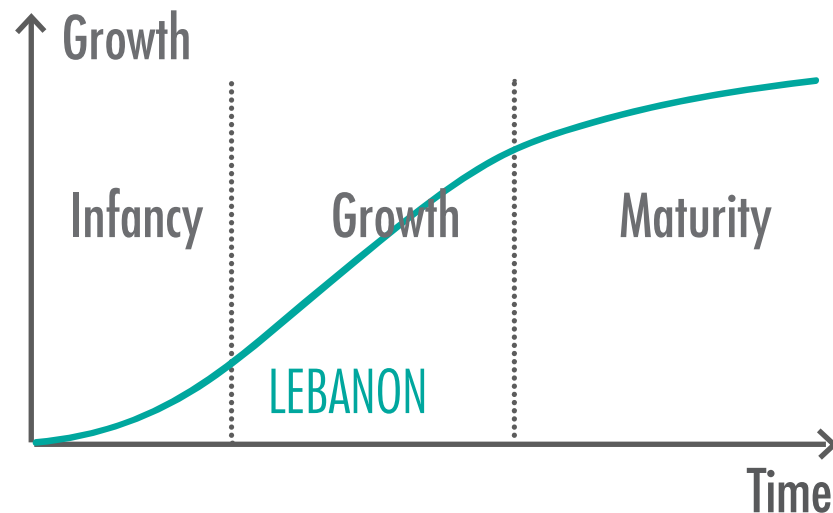
DISTRIBUTION OF DAIRY
FACTORIES BY REGION
(NUMBER OF FACTORIES
| 2015)



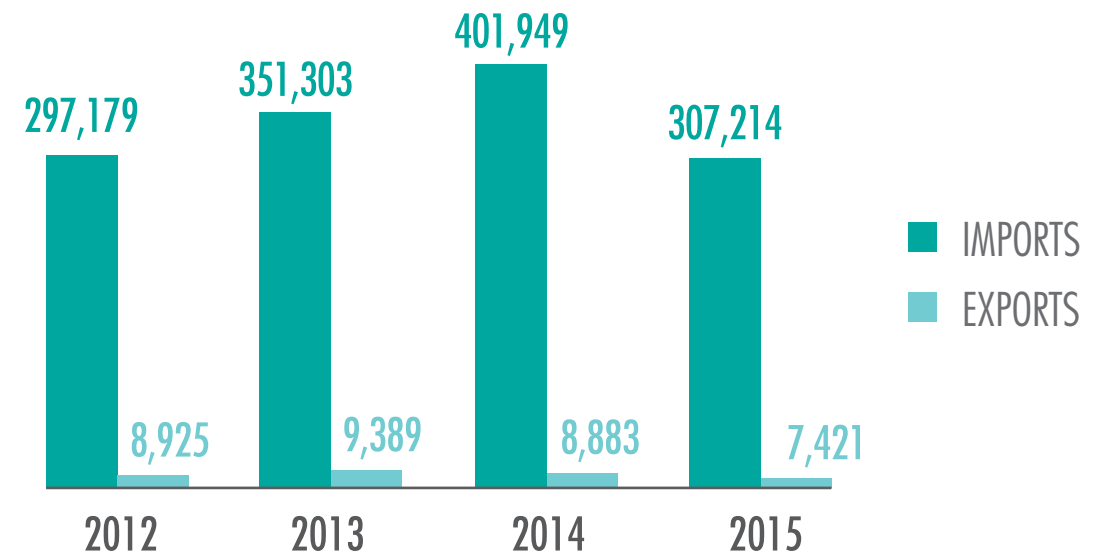
INVESTMENT OPPORTUNITIES: DAIRY PRODUCTS

► Lebanese consumers' interest in health and wellness is still in infancy but growing rapidly which creates new opportunities for manufacturing organic dairy products particularly those targeted to children like:

- **Flavored milks**
- **Dairy snacks**



LEBANESE DAIRY PRODUCTS TRADE (USD THOUSANDS | 2012-2015)



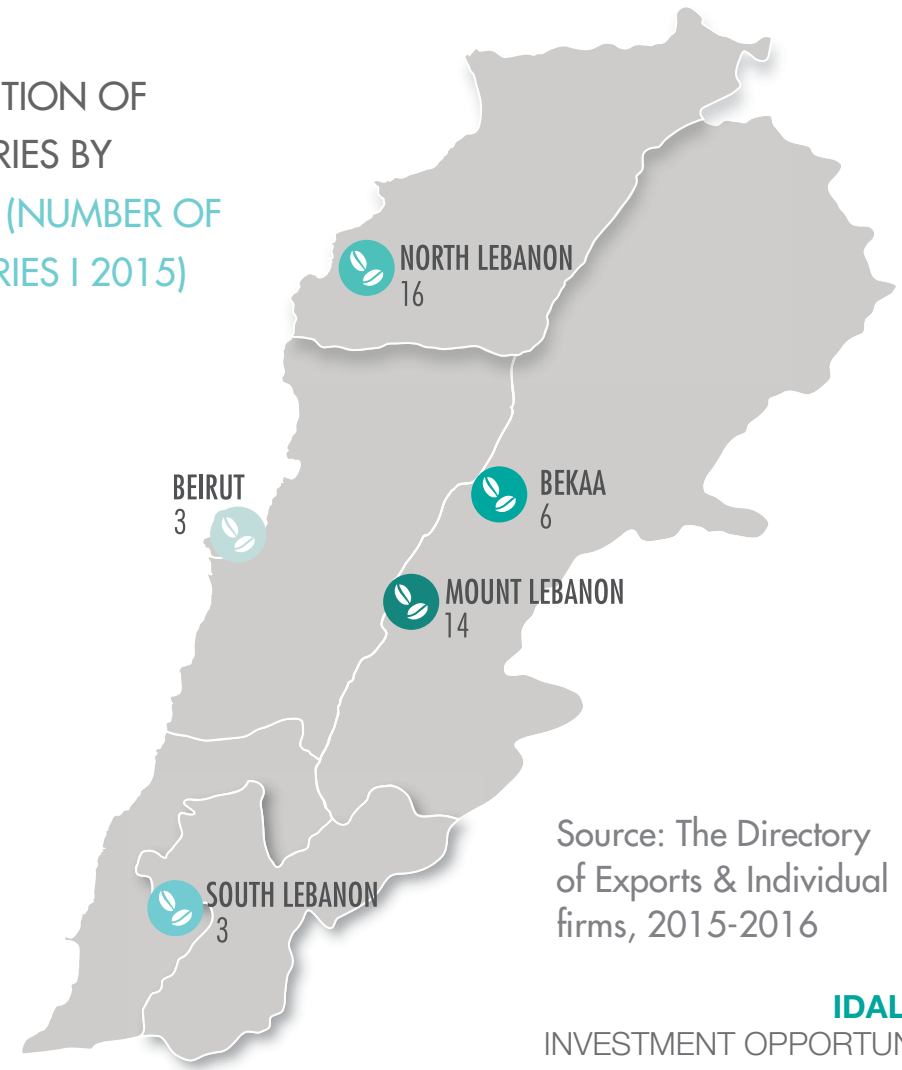
Source: Lebanese Customs

INVESTMENT OPPORTUNITIES: DRIED FRUITS & NUTS

- ▶ Preparations of fruits and nuts is one of the leading exporting agro food sub-sector in Lebanon
- ▶ The sub-sector encompasses **42 roasteries** concentrated in Mount and North Lebanon.



DISTRIBUTION OF
ROASTERIES BY
REGION (NUMBER OF
ROASTERIES | 2015)

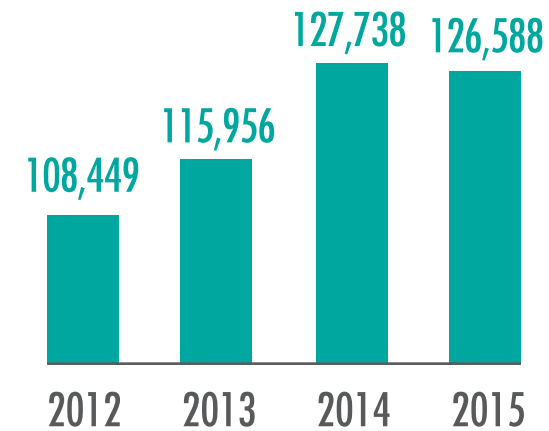


Source: The Directory
of Exports & Individual
firms, 2015-2016

INVESTMENT OPPORTUNITIES: DRIED FRUITS & NUTS

- ▶ Exports of dried fruits and nuts have been increasing at a **CAGR of 8.5%** during the period of 2012-2014
- ▶ The dried fruits and nuts value chain in Lebanon can be reshaped to create higher value and become a consistent supplier to the regional markets after addressing the EU quality certification requirements

EXPORTS OF DRIED FRUITS & NUTS (IN THOUSAND USD | 2012-2015)



Source: Lebanese Customs

INVESTMENT OPPORTUNITIES: PROCESSED FOOD

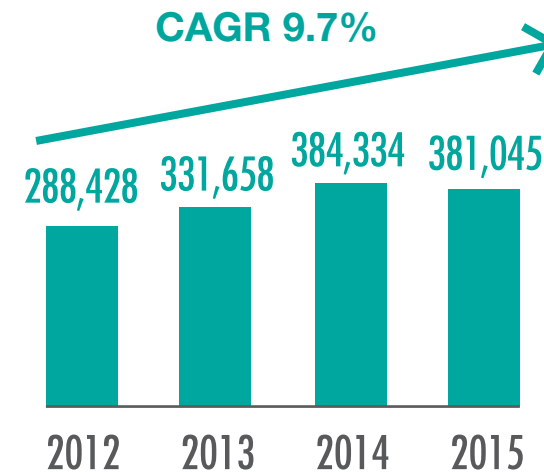
► **Lebanon mainly exports** processed foodstuff, which has increased at a **CAGR of 9.7 %** from 2012 till 2015 which reflects a growing food processing industry mainly in:

► Non Dairy-Milks

Whether it is due to milk allergy, interest in plant based diets, consumers' demand for non-dairy milk is on the rise such as:

- **Soy milk**
- **Almond milk**
- **Oat milk**
- **Coconut milk**

LEBANESE PROCESSED FOOD EXPORTS
(USD THOUSAND | 2012-2015)



Source: FAO

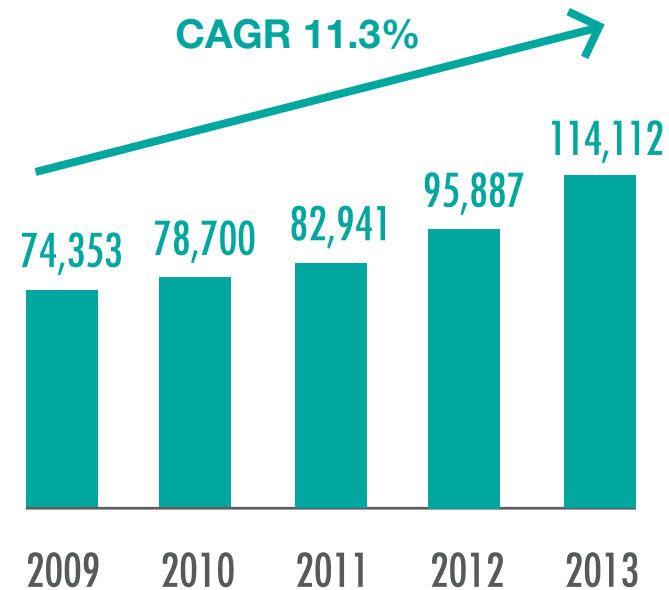
INVESTMENT OPPORTUNITIES: PROCESSED FOOD

► QUINOAS PRODUCTS

The global demand for quinoa products are rising New product development in the field of quinoa production led to a variety of quinoa-based products such as:

- Quinoa flakes and chips
- Quinoa cereal bars
- Quinoa flour

GLOBAL QUINOA PRODUCTION (IN TONS | 2009-2013)



Source: FAO

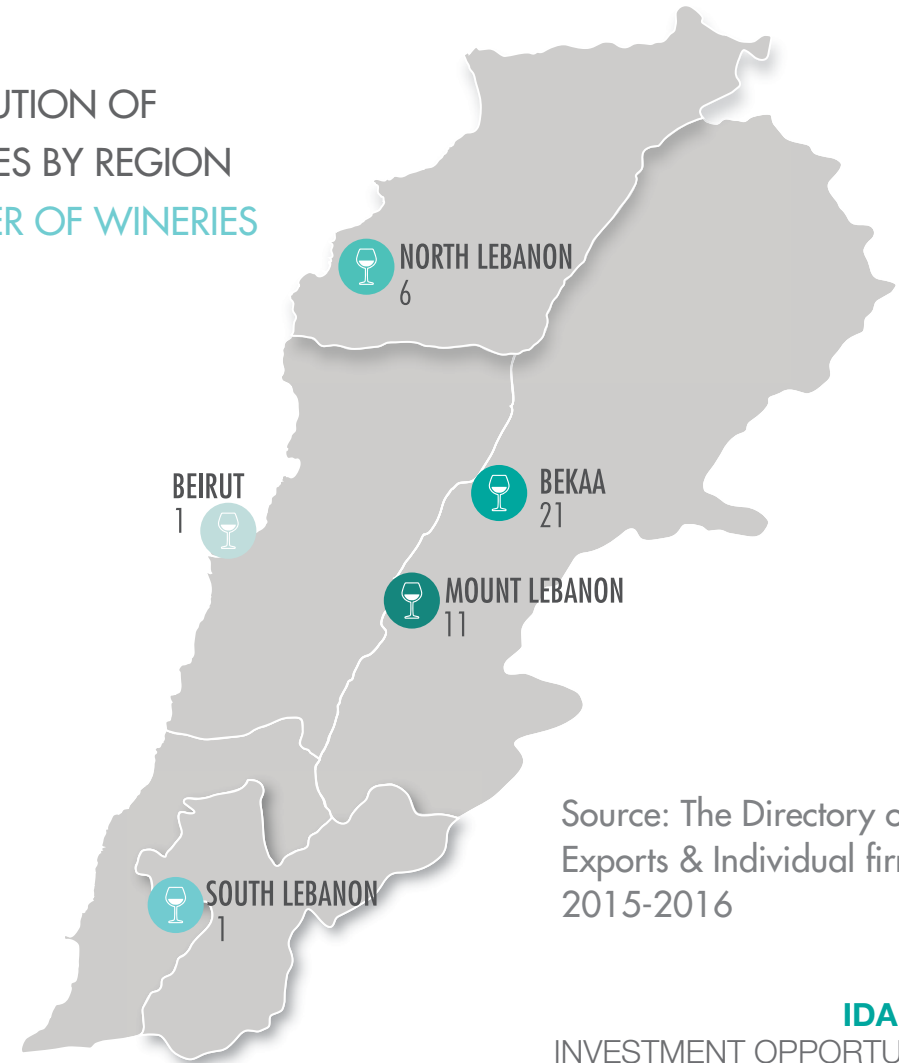
INVESTMENT OPPORTUNITIES: WINE

- ▶ The Lebanese wine industry is a **USD 41 million** industry that mainly depends on exports.
- ▶ The sub-sector encompasses **40 wineries** that produces around **8.5 million bottles** annually, with **Chateau Ksara and Chateau Kefraya** accounting for almost half of this production value.



- ▶ **Wine** is exported to over **40 countries** and has a positive balance of trade view the regional interest in its quality.

DISTRIBUTION OF
WINERIES BY REGION
(NUMBER OF WINERIES
| 2015)

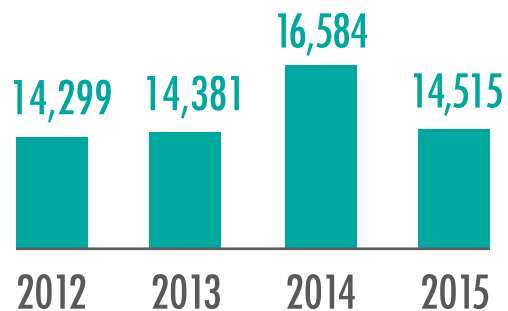


Source: The Directory of
Exports & Individual firms,
2015-2016

INVESTMENT OPPORTUNITIES: WINE

► In 2015 seven Lebanese wineries funded **“Wine Traveler” project** that aims to conduct tasting for Lebanese Wine in high end restaurants and global consumer events outside Lebanon

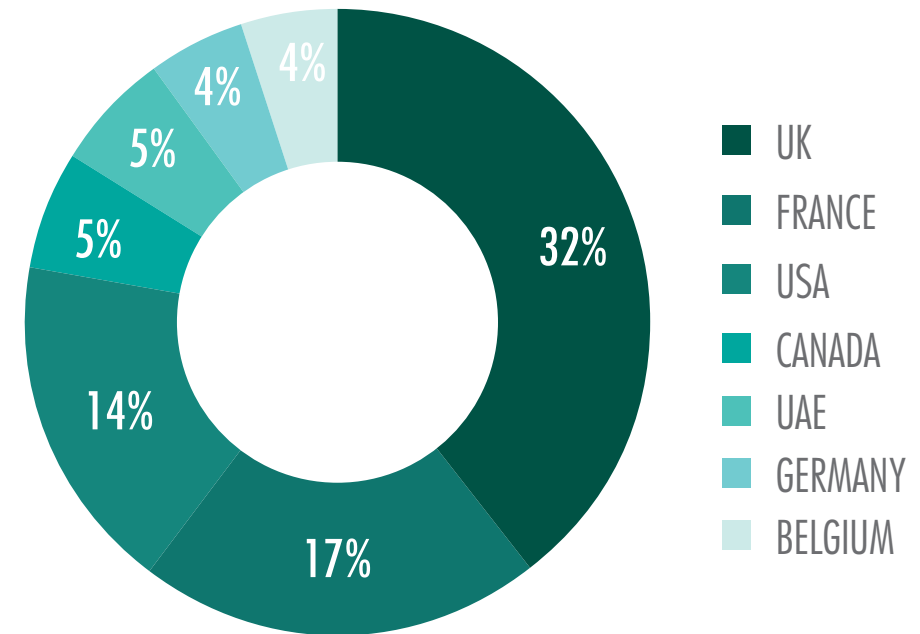
LEBANESE WINE EXPORTS (USD THOUSAND | 2012-2015)



Source: Lebanese Customs

► The future success for the **Lebanese wine industry** dictates a shift toward high quality wines catering a sophisticated wine audience. Also local wineries should focus on wine tourism activities through conducting tours in their vineyards, with the possibility for overnight stays in hotels.

LEBANESE WINE EXPORT DESTINATION (%SHARE | 2013)



Source: Union Vinicole du Liban

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4. ABOUT IDAL

THE GOVERNMENT OF LEBANON, THROUGH IDAL, OFFERS INVESTORS A RANGE OF FACILITATION SERVICES AND FISCAL EXEMPTIONS

ABOUT US

The National Investment Promotion Agency of Lebanon

HISTORY

Established in 1994 with the aim of promoting Lebanon as a key investment destination and attracting, facilitating & retaining investments in the country

GOVERNANCE

IDAL reports to the Presidency of the Council of Ministers (who exercises a tutorial authority over it) and has financial and administrative autonomy

LEGISLATION

Investment Law No. 360 was enacted in 2001 to regulate investment activities in Lebanon

OUR MANDATES

INVESTMENT PROMOTION

- ▶ Provide economic, commercial and legal information of relevance to investors
- ▶ Identifies business opportunities across various economic sectors
- ▶ Provide in depth analysis of sectors
- ▶ Grant fiscal exemptions and fees reduction to investment projects
- ▶ Facilitate issuance of permits and licenses
- ▶ Provide on-going support for investment projects
- ▶ Actively promotes Lebanon as key investment destination

EXPORT PROMOTION

- ▶ Provide data on external markets
- ▶ Support companies in accessing external markets
- ▶ Subsidize participation in foreign fairs

IDAL CURRENTLY HAS IN PLACE 3 EXPORT PROMOTION PROGRAMS:

1. AGRI PLUS (2012):

Which provides subsidies and support to exporters of agricultural products

2. AGRO MAP (2004):

Which subsidizes the participation of agro food companies in foreign fairs licenses

3. M LEB (2015):

Which provides subsidies and support to exporters of Lebanese products to the Gulf countries and Jordan

IDAL OFFERS INVESTORS A RANGE OF SERVICES THROUGHOUT THEIR DIFFERENT STAGES OF OPERATION

1 PRE-INVESTMENT STAGE MARKET INTELLIGENCE

Information on investment opportunities
Data on economic sectors with growth potential
Legal, financial, industrial information
Data on investment climate.
Business Matchmaking support

2 FINANCING STAGE PACKAGE OF INCENTIVES

FISCAL INCENTIVES:

Exemptions from corporate income tax generated by the project which can go up to 100% exemption for 10 years

FINANCIAL INCENTIVES:

Reduction on land registration fees

NON-FINANCIAL INCENTIVES:

Employees for the project are granted work permits with the support of IDAL

3 LICENSING AND AFTER-CARE STAGE ONE STOP SHOP

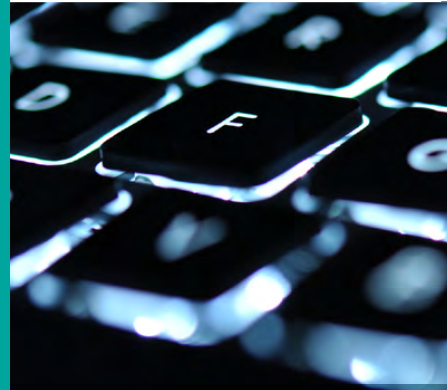
IDAL serves as a One Stop Shop for Investors. We supersede all public administrations, authorities and municipalities in issuing administrative permits and licenses except those granted by the Council of Ministers.

We follow up with investors after the start of their operations

EIGHT SECTORS ARE ELIGIBLE FOR OUR INCENTIVES

IDAL PROVIDES INCENTIVES
TO EIGHT SECTORS WITH
GROWTH POTENTIAL
AND READINESS FOR
DEVELOPMENT

THESE SECTORS WERE
INCLUDED IN LAW N.360
IN 2001



TECHNOLOGY



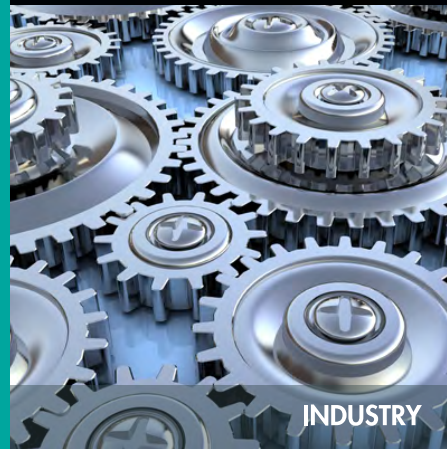
FOOD AND BEVERAGES



INFORMATION TECHNOLOGY



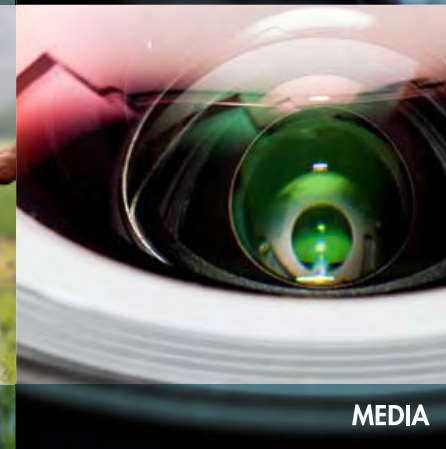
TOURISM



INDUSTRY



AGRICULTURE



MEDIA



TELECOM

TWO TYPES OF INCENTIVE SCHEMES:

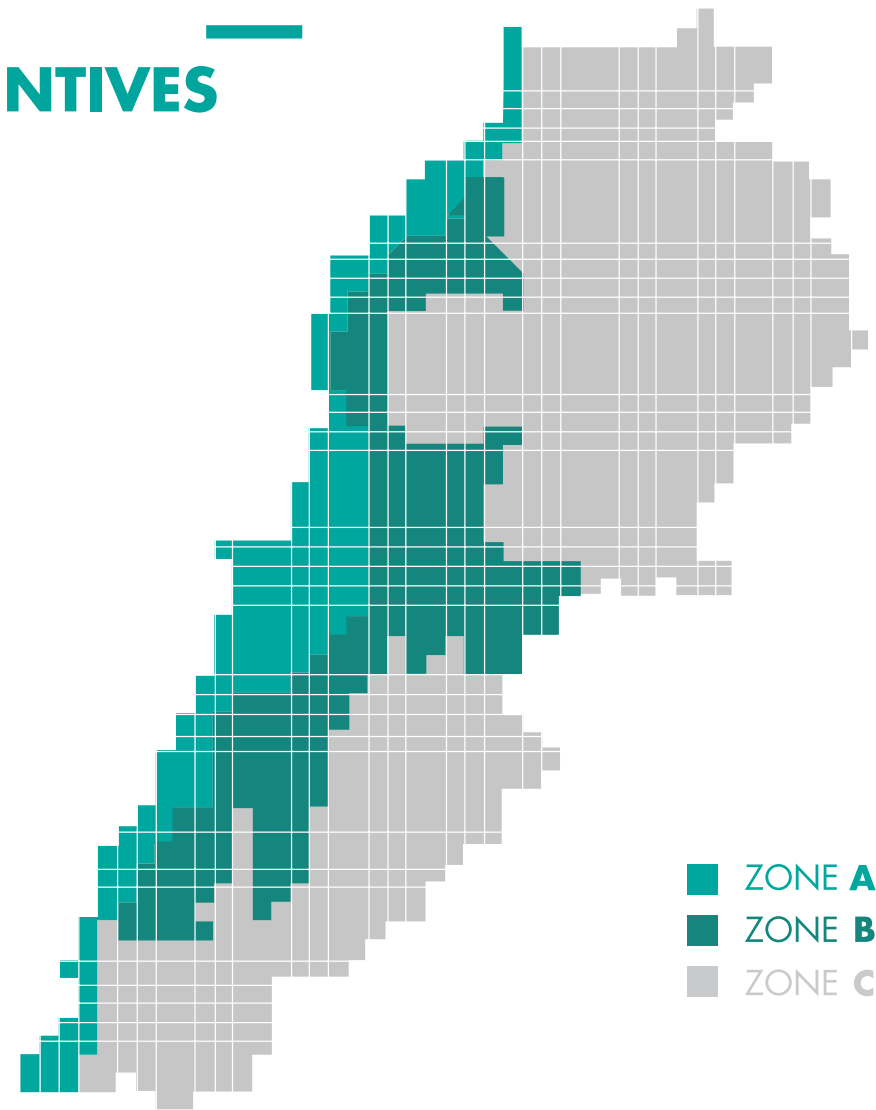
1. REGION & SECTOR BASED INCENTIVE

- Also called Investment Projects by Zone (IPZ)
- Provided to projects based on:
 - (1) Geographical location across 3 Zones: A, B, C
 - (2) Investment size
 - (3) Sector

INCENTIVES PROVIDED

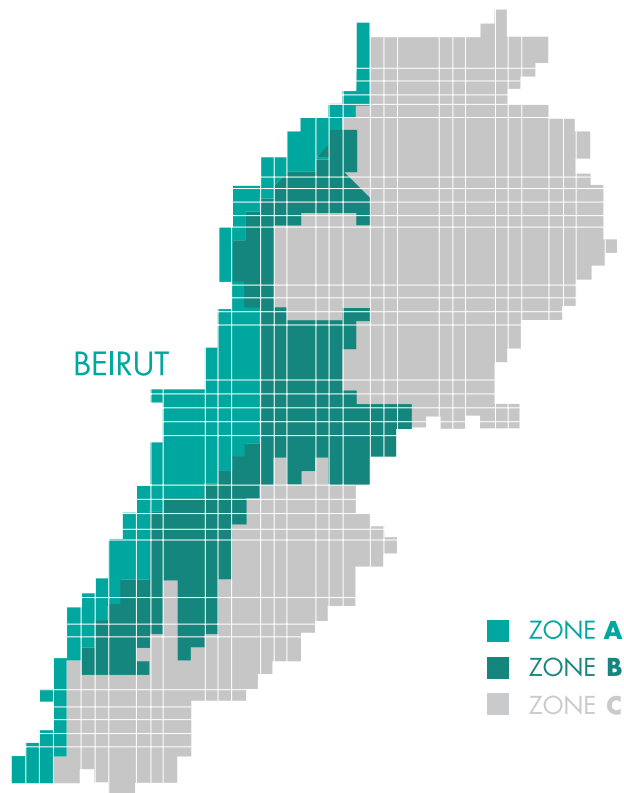
- Up to 100% tax exemptions for 10 years for projects located in remote areas (Zone C)
- Work Permits granted

OUR INCENTIVES



1.REGION BASED INCENTIVE Investment Projects by Zone (IPZ)

► EIGHTS SECTORS ARE ELIGIBLE FOR OUR INCENTIVES



INCENTIVES GRANTED BASED ON GEOGRAPHICAL DISTRIBUTION AND INVESTMENT SIZE

ZONE A	ZONE B	ZONE C
Work permits for all categories.	Work permits for all categories.	Work permits for all categories.
Full exemption from corporate income tax for a two-year period provided that at least 40% of the company's shares are listed on the Beirut Stock Exchange.	A 50% reduction on corporate income tax and taxes on project dividends for a five-year period.	Full exemption from corporate income tax and taxes on project dividends for a ten-year period.
	Full exemption from corporate income tax for two additional years provided that at least 40% of the company's shares are listed on the Beirut Stock Exchange.	Full exemption from income tax for two additional years provided that at least 40% of the company's shares are listed on the Beirut Stock Exchange.

1.SECTOR BASED INCENTIVE

Investment Projects by Zone (IPZ)

ELIGIBILITY CRITERIA

SECTORS	MINIMUM INVESTMENT REQUIRED (USD)		
	ZONE A	ZONE B	ZONE C
TOURISM	10.000.000	4.000.000	1.000.000
INDUSTRY	5.000.000	3.000.000	1.000.000
AGRO-INDUSTRY	2.000.000	1.500.000	1.000.000
AGRICULTURE	1.500.000	1.000.000	500.000
INFORMATION TECHNOLOGY	200.000	200.000	200.000
TECHNOLOGY	200.000	200.000	200.000
TELECOMMUNICATION	200.000	200.000	200.000
MEDIA	200.000	200.000	200.000

TWO TYPES OF INCENTIVE SCHEMES:

2. JOB CREATION BASED INCENTIVE

- Also called **Package Deal Contract (PDC)**

- Provided to projects based on:
 - (1) Investment size
 - (2) Number of jobs created
 - (3) Sector

INCENTIVES PROVIDED

- 100% exemption of Income Tax
- 100 % exemptions on Taxes on Project Dividends for up to 10 years
- Up to a 50% reduction on Work and Residence Permit Fees
- Up to a 50% reduction on Construction Permit Fees
- Full exemption from Land Registration Fees

OUR INCENTIVES



2.JOB CREATION & SECTOR BASED INCENTIVE Package Deal Contract (PDC)

INCENTIVES GRANTED BASED ON JOB CREATION & SECTOR BASED

- ▶ 100% Exemption on Income Tax for up to 10 years
- ▶ Up to 50% Reduction on Construction Permit Fees
- ▶ Up to 50% Reduction on Work and Residence Permits
- ▶ Zero Land Registration Fees
- ▶ 100% Exemption on Taxes on Project Dividends for up to 10 years
- ▶ Obtaining Work Permits of all categories

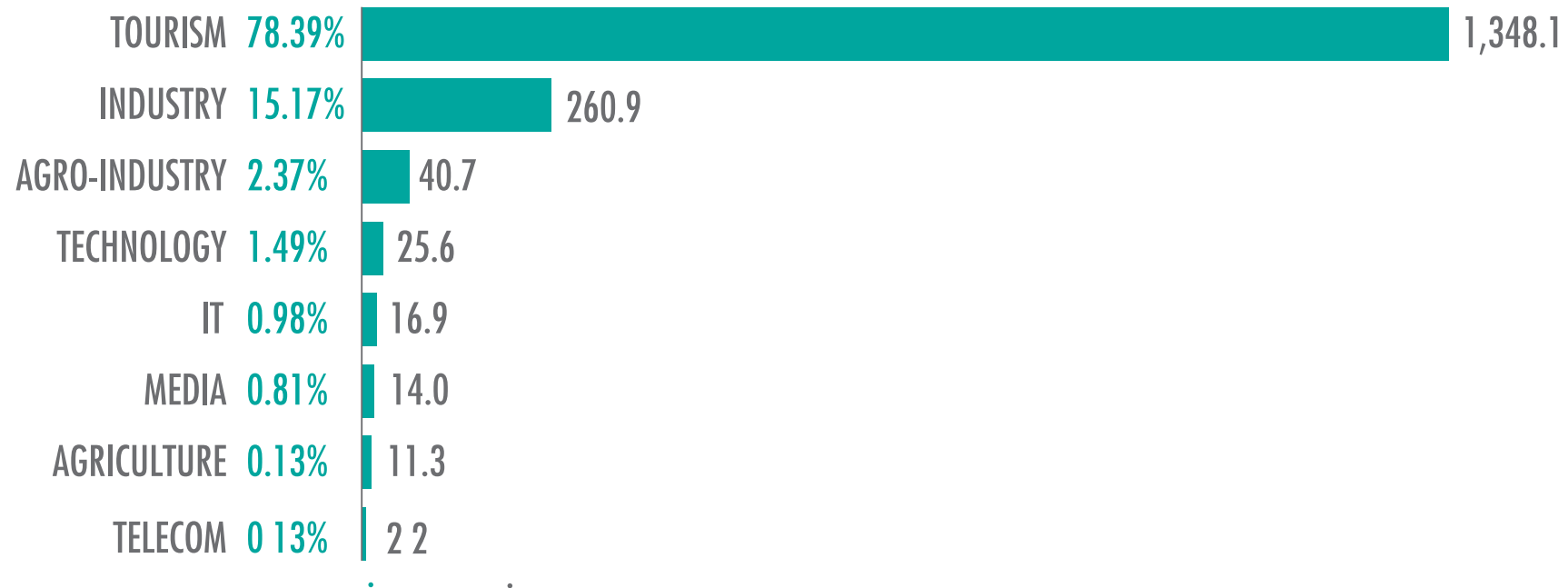
2.JOB CREATION & SECTOR BASED INCENTIVE Package Deal Contract (PDC)

ELIGIBILITY CRITERIA

SECTORS	MINIMUM INVESTMENT REQUIRED (USD)	MINIMUM JOB CREATION
TOURISM	15.000.000	200
INDUSTRY	10.000.000	100
AGRO-INDUSTRY	3.000.000	60
AGRICULTURE	2.000.000	50
INFORMATION TECHNOLOGY	400.000	25
TECHNOLOGY	400.000	25
TELECOMMUNICATION	400.000	25
MEDIA	400.000	25

▶ OUR ACHIEVEMENTS

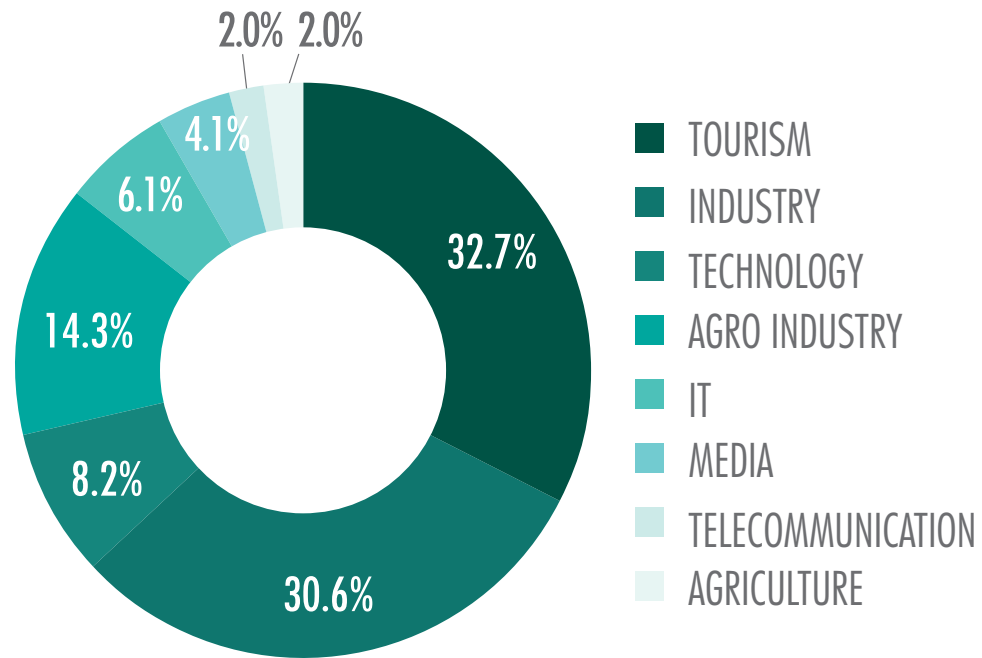
INVESTMENTS ATTRACTED THROUGH IDAL (USD MILLION) (2003-2015)



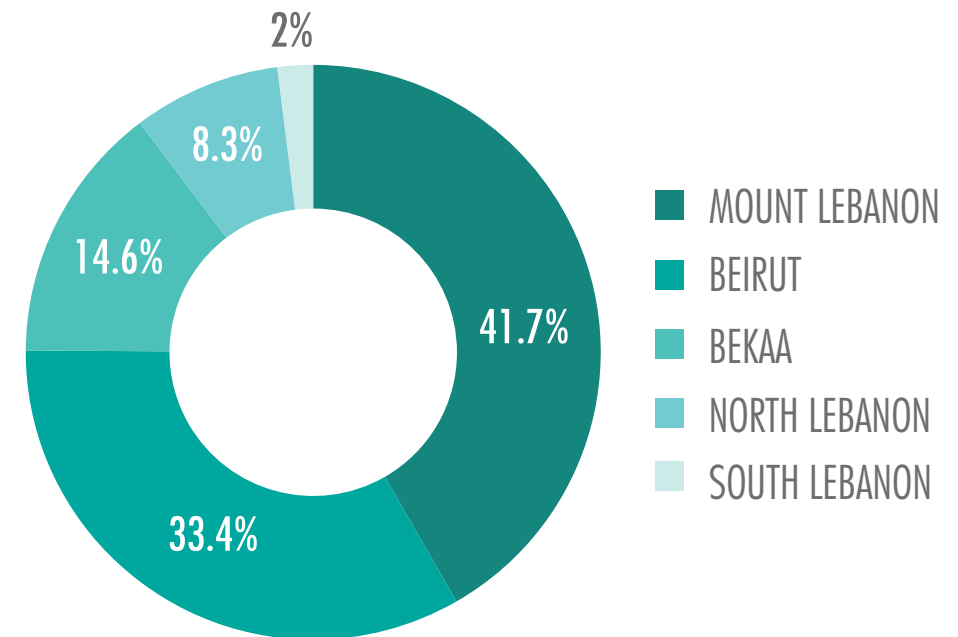
TOTAL: 1719.671023 USD
Source: IDAL's Calculations

OUR ACHIEVEMENTS

DISTRIBUTION OF PROJECTS BY SECTORS (%) (2003-2015)



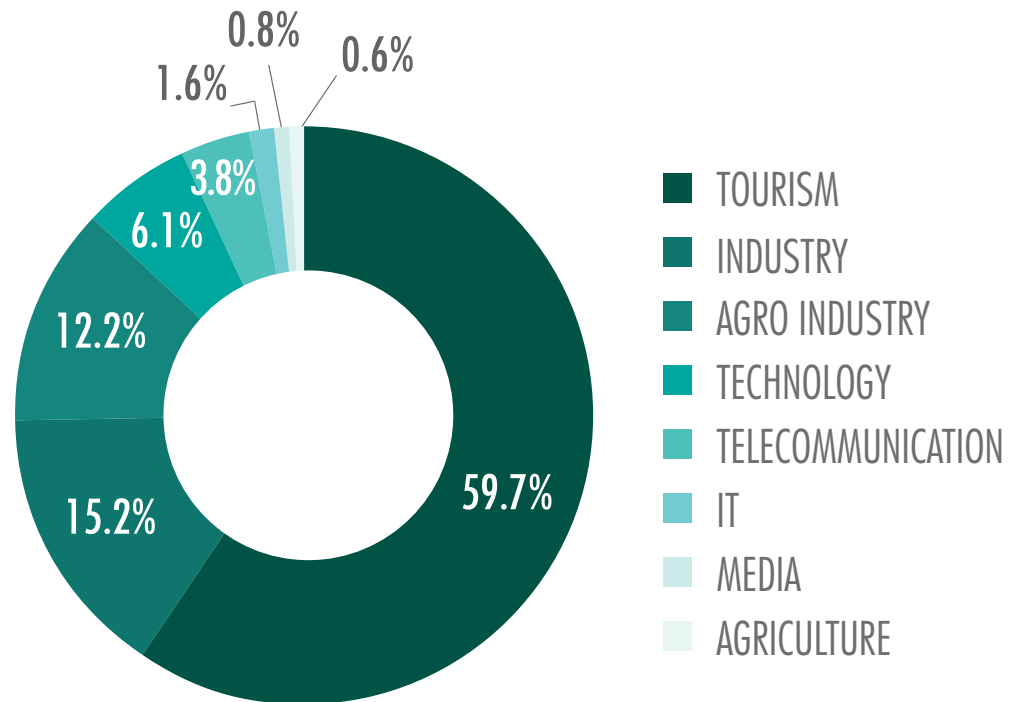
DISTRIBUTION OF PROJECTS BY REGION (%) (2003-2015)



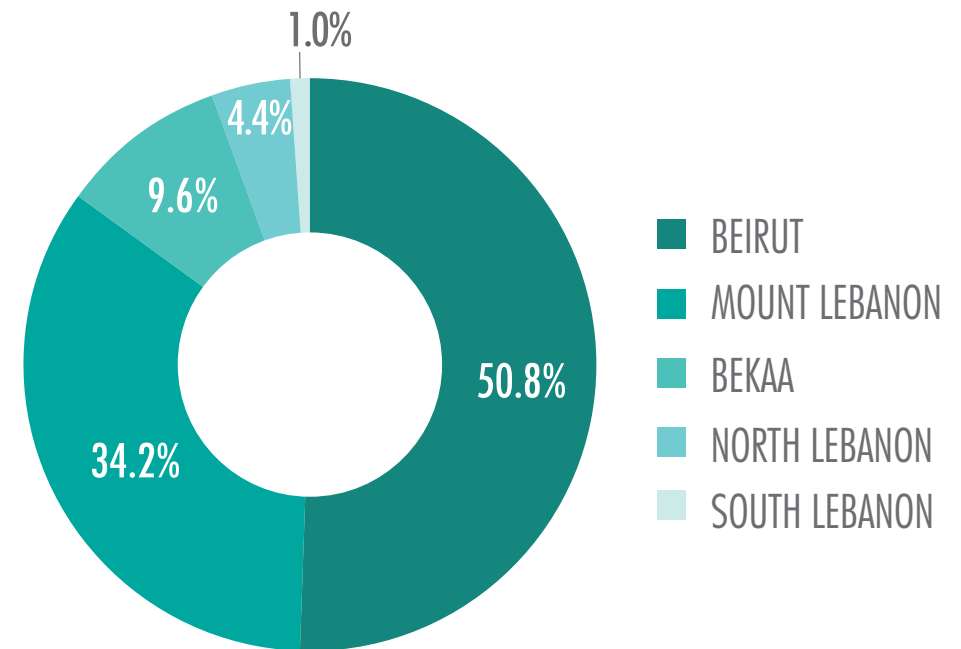
TOTAL: 49
Source: IDAL's Calculations

▶ OUR ACHIEVEMENTS

TOTAL JOBS CREATED BY SECTOR (%) (2003-2015)



TOTAL JOBS CREATED BY REGION (%) (2003-2015)



TOTAL: 5,872
Source: IDAL's Calculations

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