

**IDAL**

INVEST IN LEBANON

# INVESTMENT OPPORTUNITIES IN JEZZINE 2017



INVESTMENT DEVELOPMENT  
AUTHORITY OF **LEBANON**

Presidency of the Council of Ministers

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# HEADLINES

**1. BASELINE ANALYSIS OF THE JEZZINE DISTRICT**

2. INVESTMENT OPPORTUNITIES IN JEZZINE

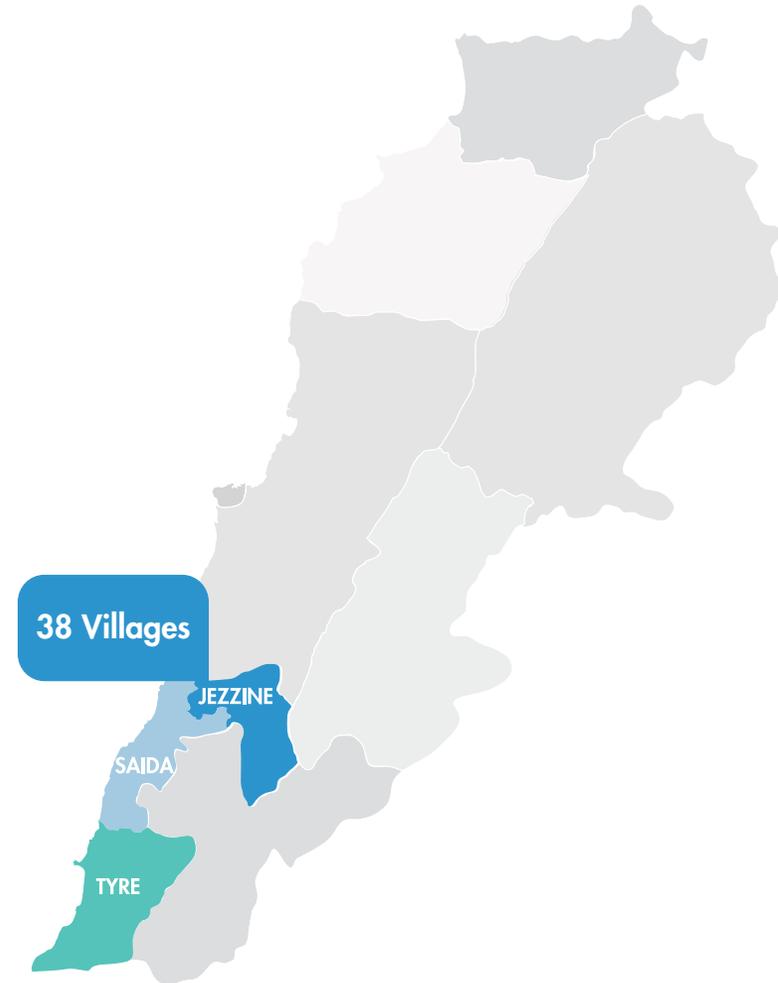
# Jezzine is one of the 3 districts of the South Lebanon Governorate, and is composed of 38 villages

LEBANON'S 8 GOVERNORATES



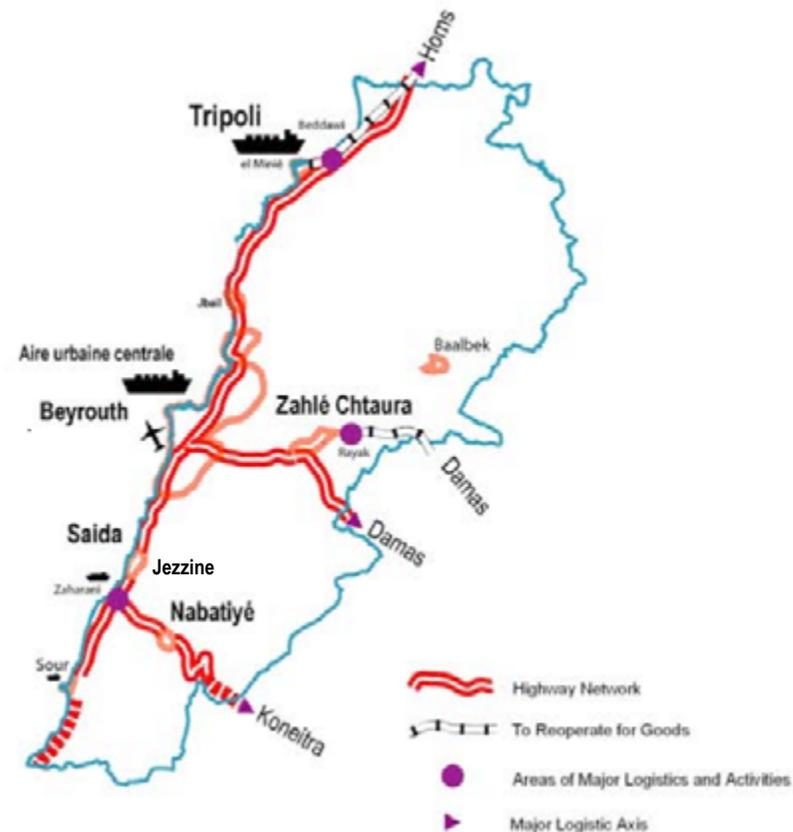
Source: Centre de Ressource sur le Developement Local du Liban, 2016

SOUTH LEBANON GOVERNORATE'S 3 DISTRICTS



It is located approximately 30 min away from the Port of Saida, Lebanon's 3<sup>rd</sup> biggest Sea port

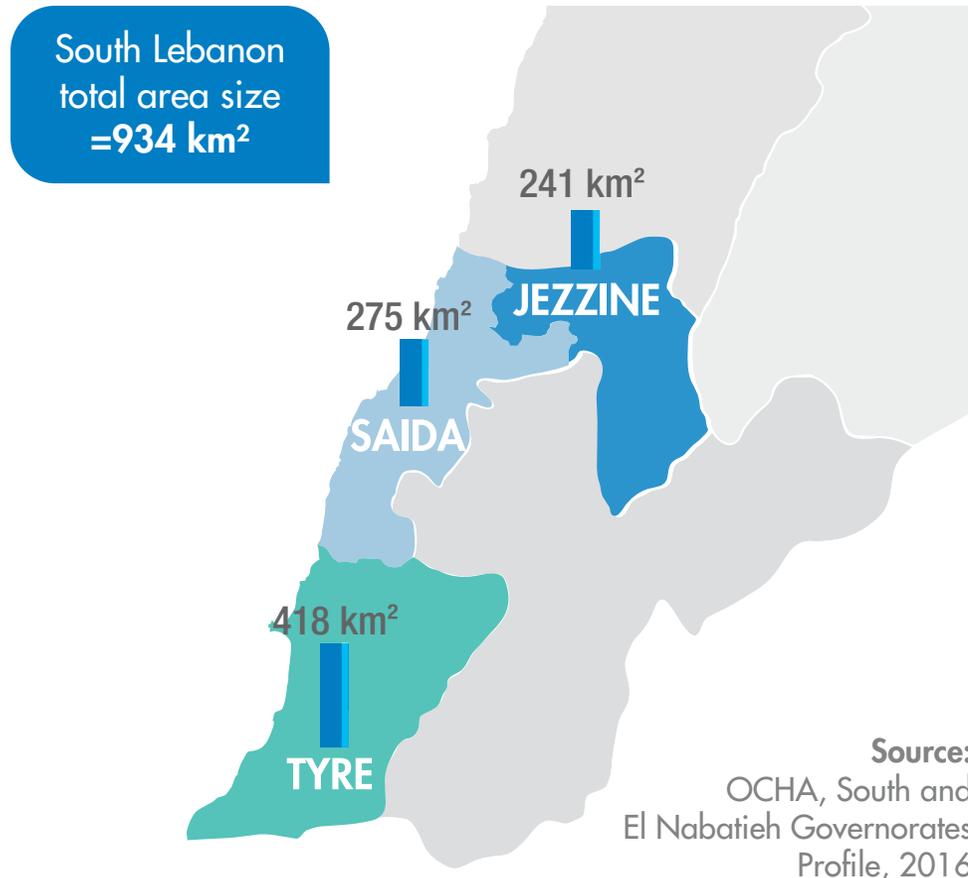
MAP OF TRANSPORTATION INFRASTRUCTURE | 2005



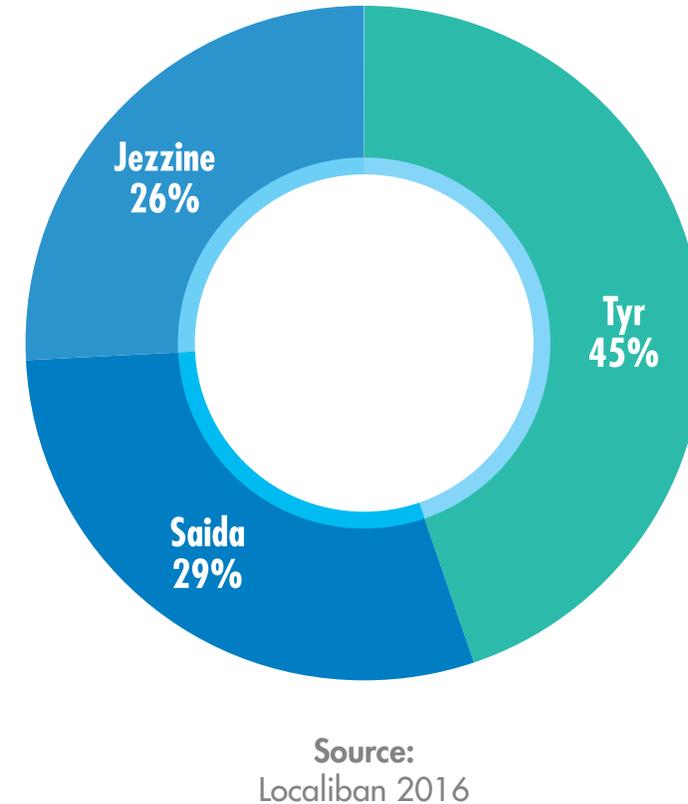
Source: Council for Reconstruction and Development, 2005

Jezzine is the smallest districts of the South Governorate, with an area of 241 km<sup>2</sup>, accounting for 26% of the Governorate's total size...

AREA SIZE OF DISTRICTS IN SOUTH LEBANON GOVERNORATE | 2016

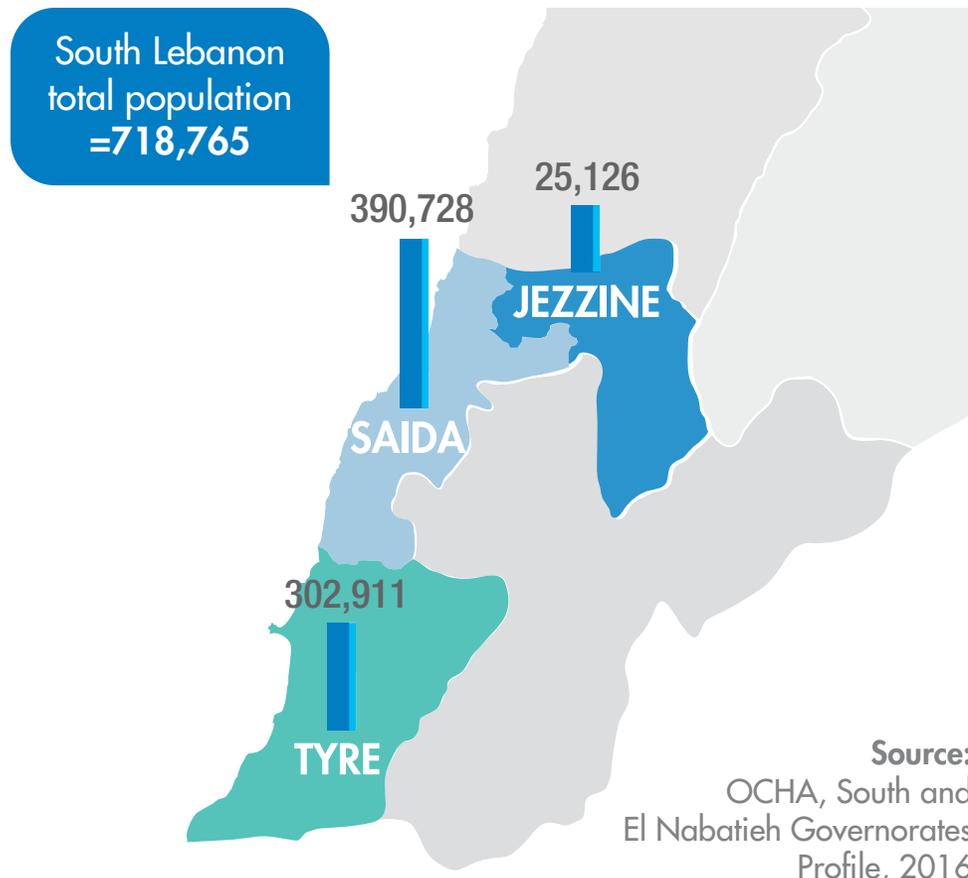


DISTRIBUTION OF SOUTH LEBANON AREA SIZE BY DISTRICT | 2016

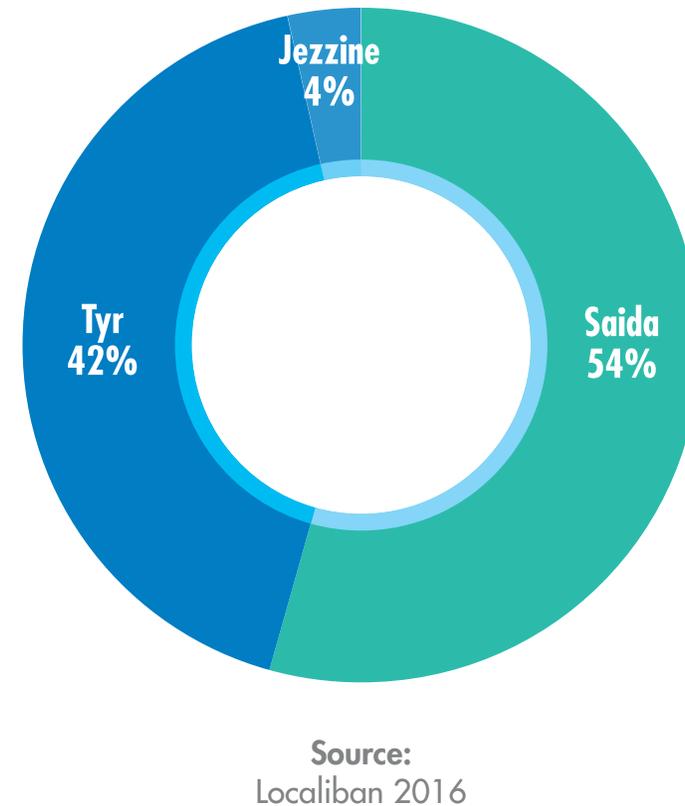


... and is the least populated district with around 25,000 inhabitants, accounting for 4% of the South population

POPULATION OF DISTRICTS IN SOUTH LEBANON GOVERNORATE | 2016

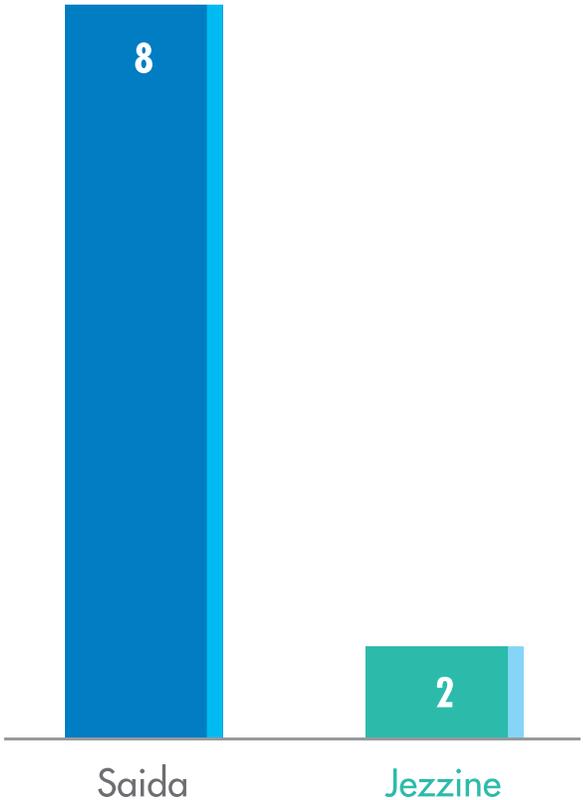


DISTRIBUTION OF SOUTH LEBANON POPULATION BY DISTRICT | 2016



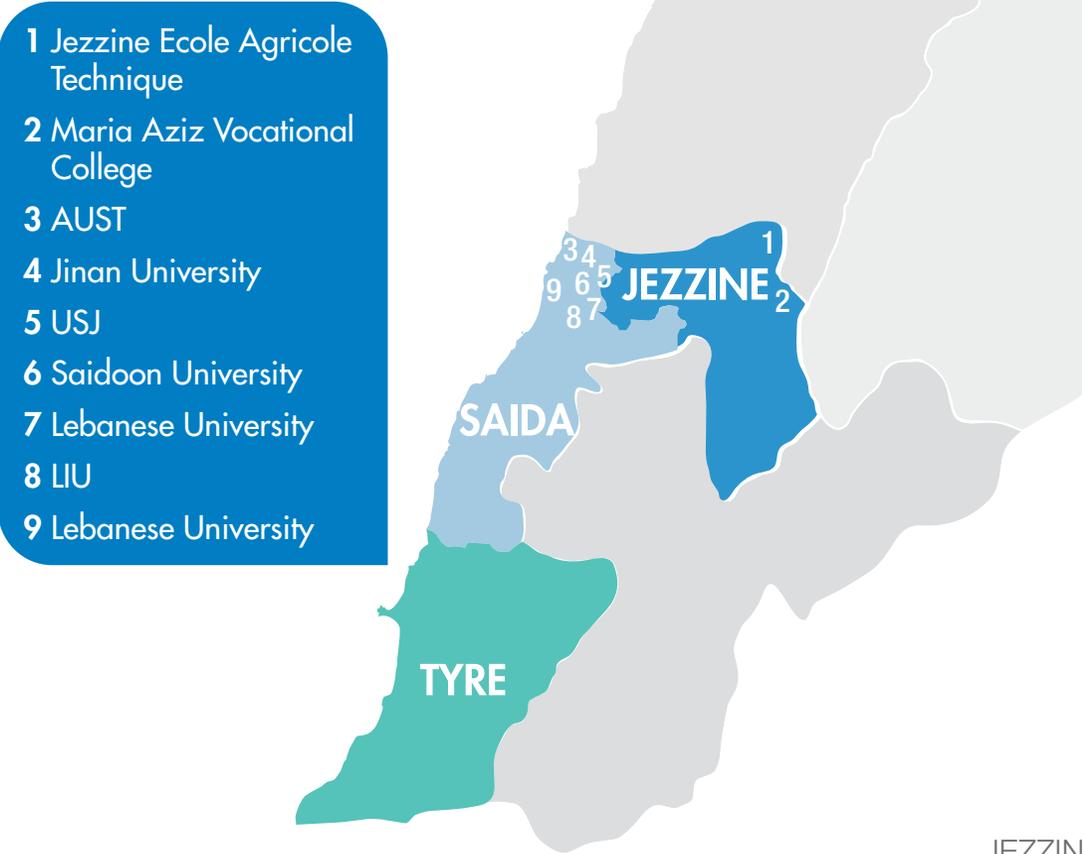
# There are 2 vocational schools in Jezzine, and students usually attend one of Saida's 8 universities...

NUMBER OF HIGHER EDUCATION INSTITUTES IN SAIDA AND JEZZINE | 2016



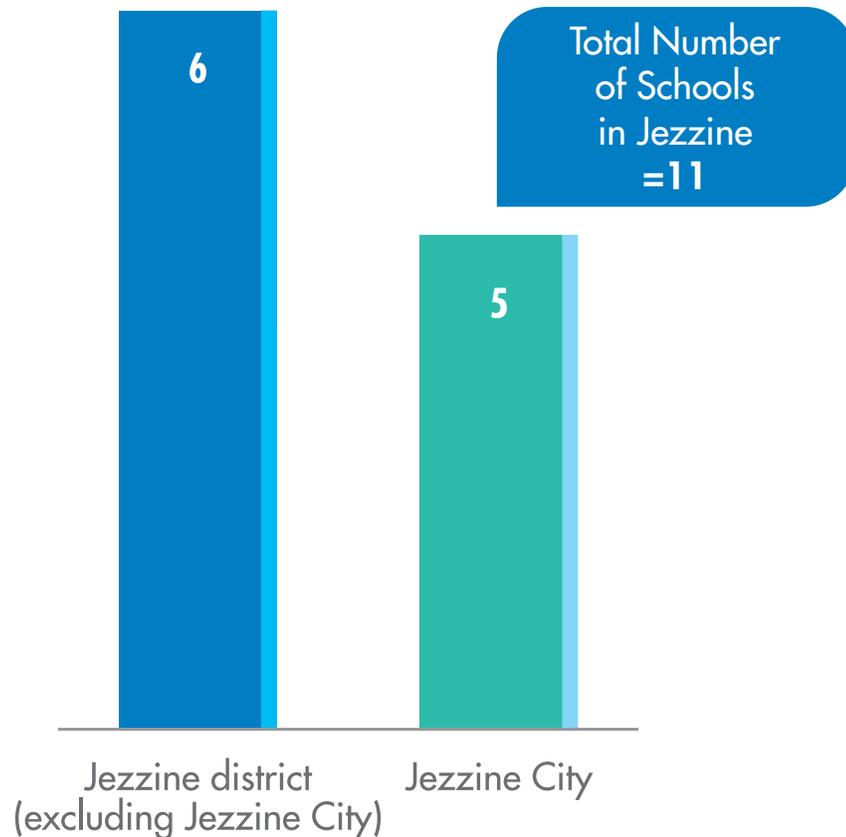
Source: Federation of the Municipalities of Jezzine, 2016

DISTRIBUTION OF VOCATIONAL SCHOOLS & UNIVERSITIES IN THE JEZZINE DISTRICT | 2016



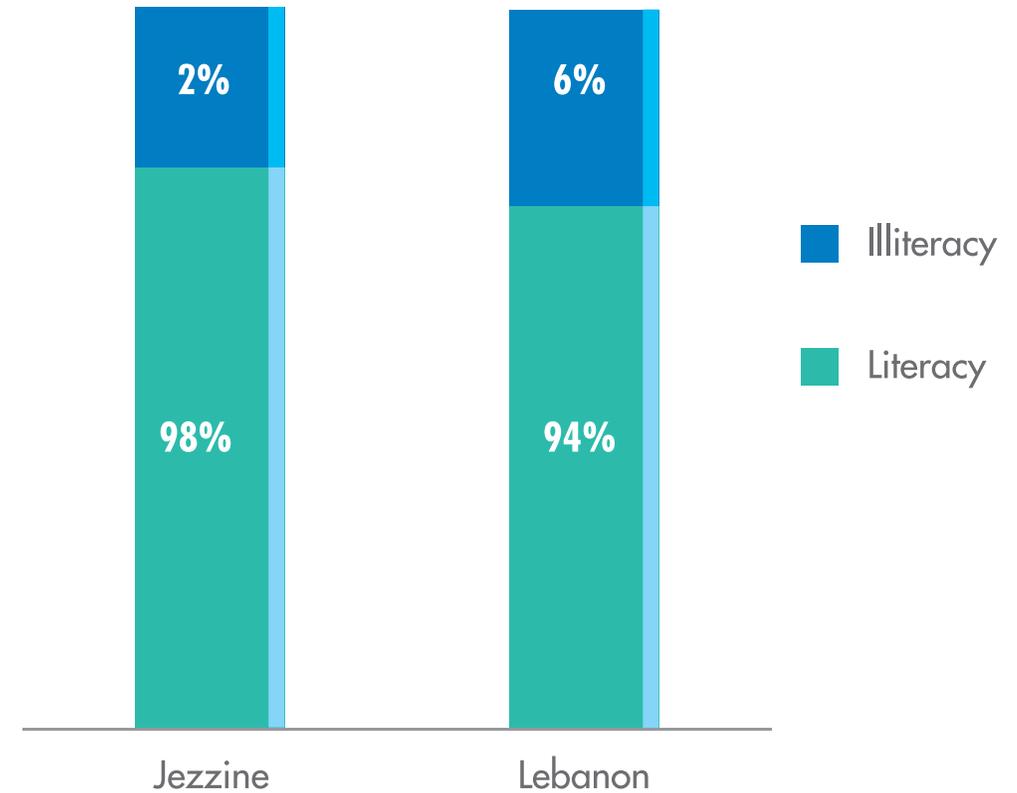
...however, the presence of 11 public schools, of which 5 are located in Jezzine city maintains a high literacy rate in the district, higher than the Lebanese average

LOCATION OF PUBLIC SCHOOLS  
IN JEZZINE DISTRICT | 2016



Source: Federation of the Municipalities of Jezzine, 2016

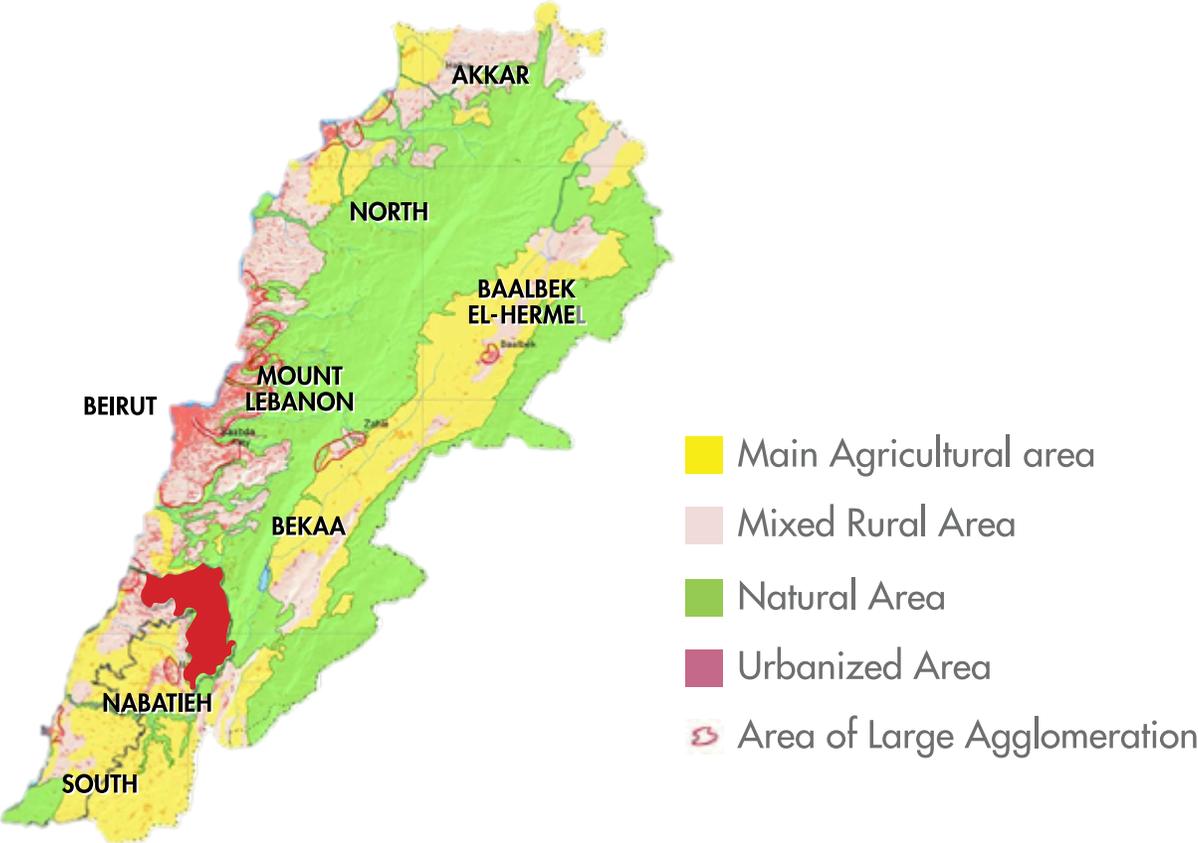
LITERACY RATE IN LEBANON  
AND JEZZINE DISTRICT % | 2016



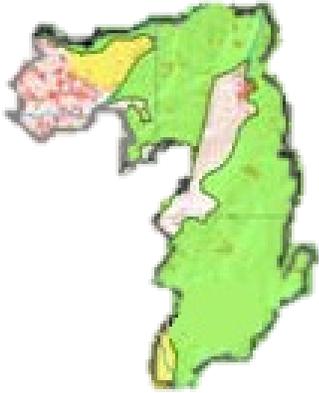
Source: UNESCO, 2015 Federation of the Municipalities of Jezzine, 2016

# Most of the Jezzine territory is covered in natural areas, the highest portion compared to South Lebanon Districts...

MAP OF LEBANON'S  
DOMINANT LAND USE | 2005

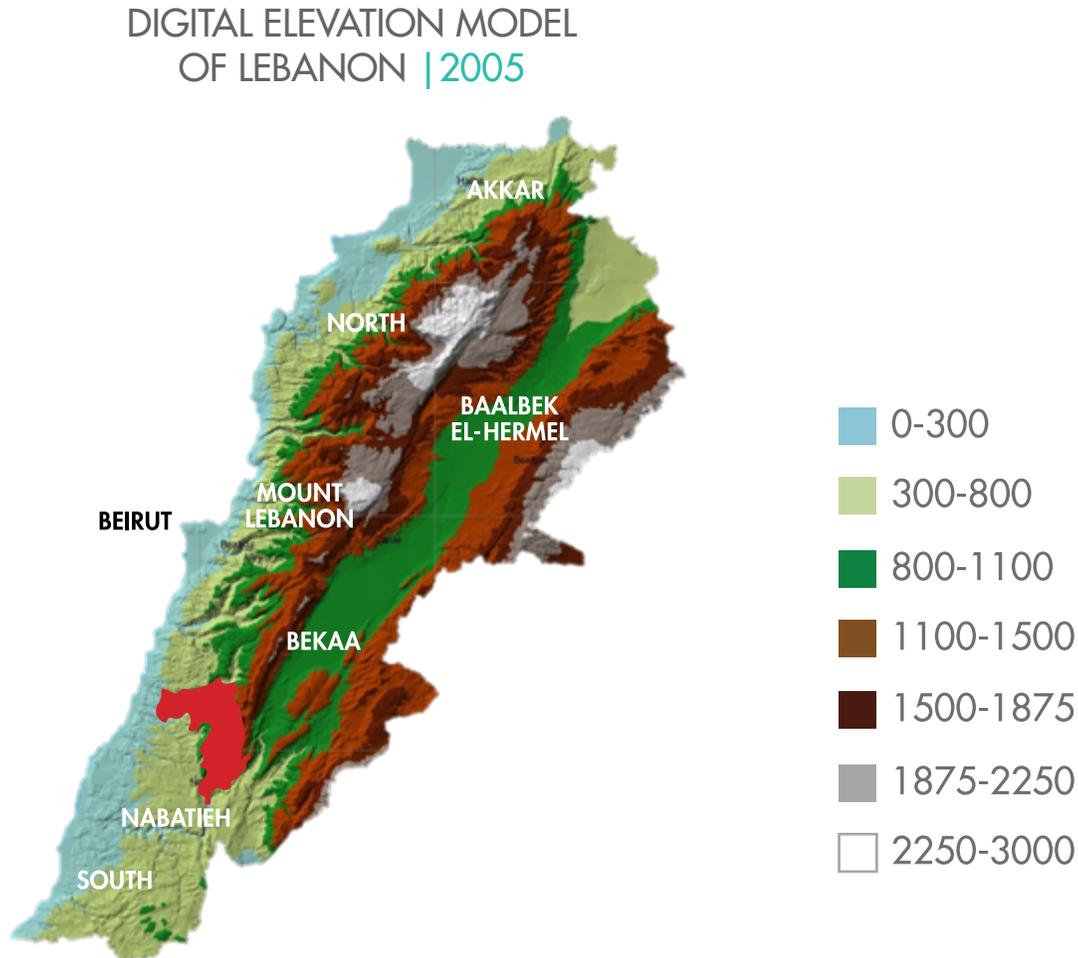


MAP OF JEZZINE DISTRICT  
DOMINANT LAND USE | 2005



Source: Council for Reconstruction and Development, 2005

... and is situated between 300 to 1600 meters above sea level ensuring mild climate conditions and different soil types



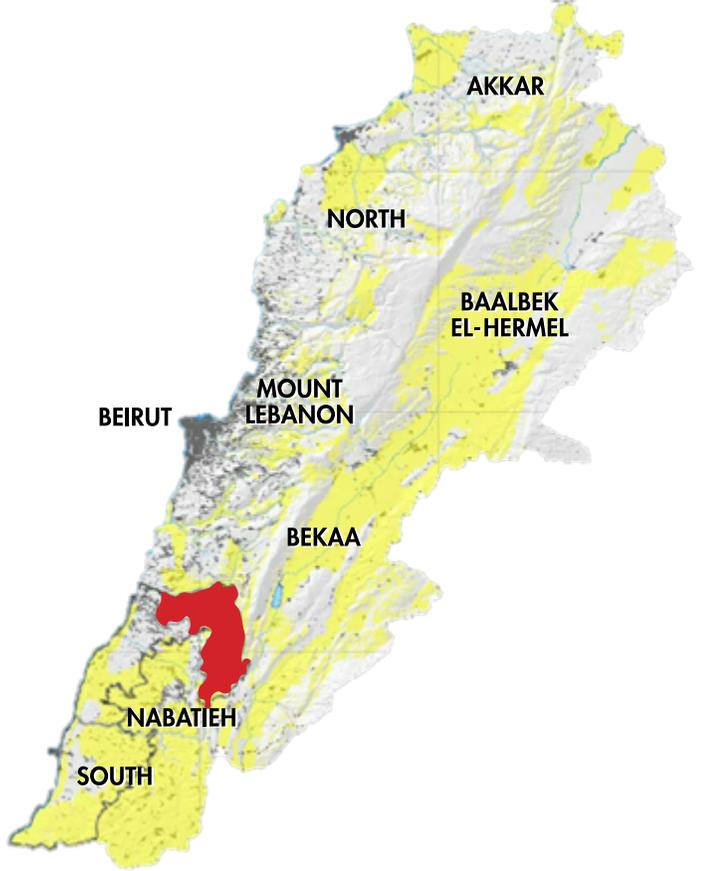
JEZZINE DISTRICT  
RIVERS MAP | 2005



Source: Council for Reconstruction and Development, 2005

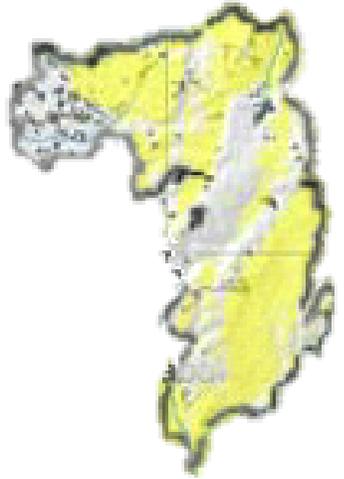
# The 3 rivers spanning its area render the agriculture sector a primary source of activity for the Jezzine inhabitants...

MAP OF AGRICULTURAL DOMAIN IN LEBANON | 2005



- Main Agricultural Territories
- Urbanized Areas

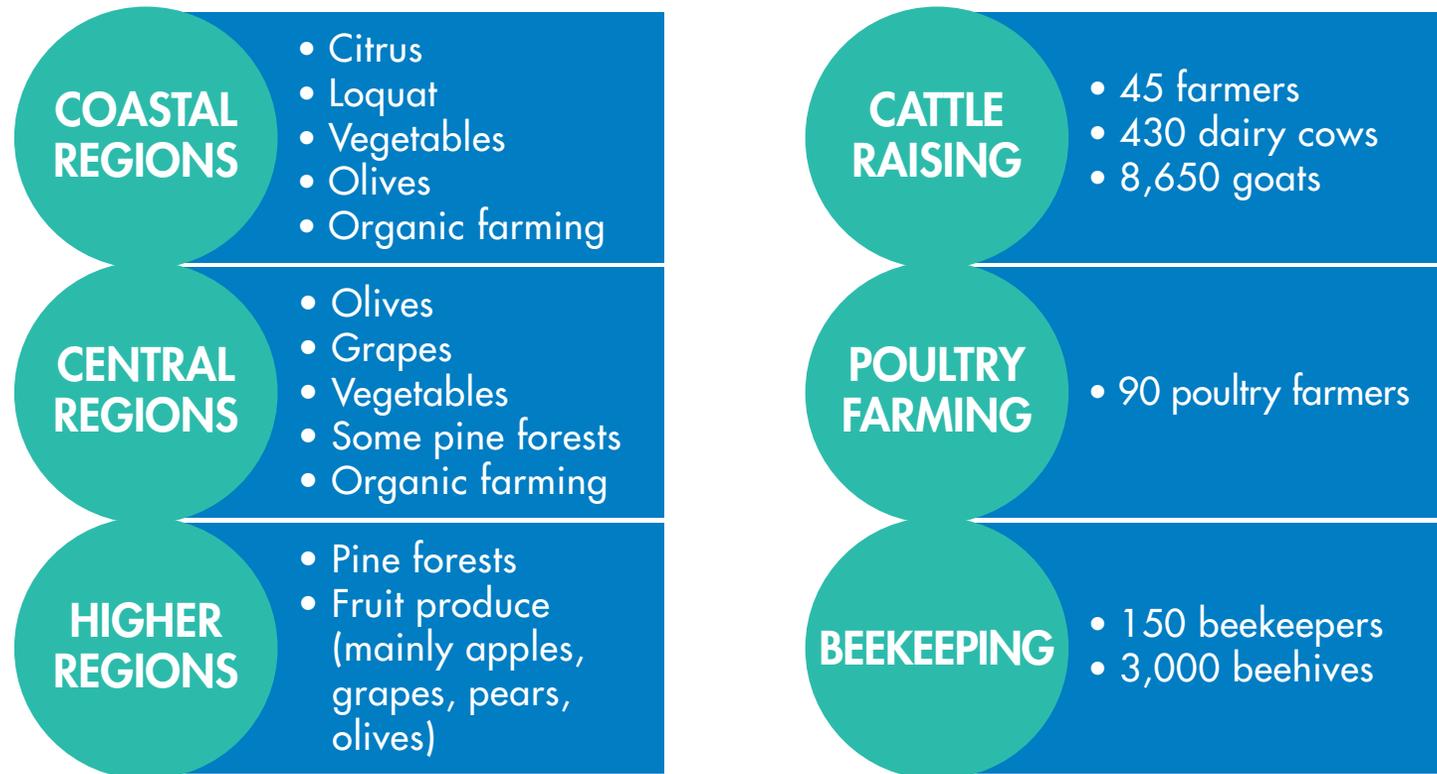
MAP OF AGRICULTURAL DOMAIN IN JEZZINE | 2005



Source: Council for Reconstruction and Development, 2005

... with different agricultural activities and a variety of agricultural produces coming from Jezzine

### AGRICULTURAL PRODUCTS AND ACTIVITIES IN JEZZINE



Source: Strategic Development Plan for Jezzine, MORES 2012  
AFC Consultants, Jezzine Feasibility Study – Goat Dairy Plant

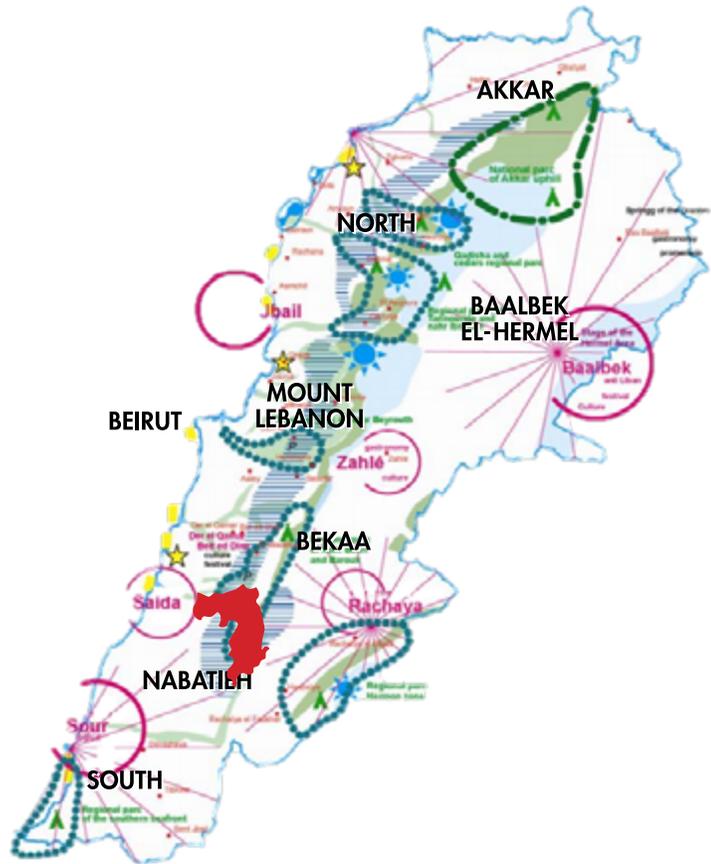
# Initiatives have been put in place to expand agricultural activities, but there's room for increased investment along the Agriculture and Agrofood value chain

## INITIATIVES TO BOOST AGRICULTURAL PRODUCTION OF JEZZINE

<b>PINE NUTS</b>	<ul style="list-style-type: none"><li>• Jezzine Pine Cooperative</li><li>• USAID</li><li>• Ministry of Agriculture</li><li>• Union of Municipalities of Jezzine</li></ul>	Creation of the Pine House, a processing unit for pine nuts providing processing, packing, and marketing services of pine nuts.
<b>OLIVE OIL</b>	<ul style="list-style-type: none"><li>• Olive Oil Cooperative of Jezzine</li><li>• USAID</li></ul>	Supported improvements in processing at Olive Oil mills. Established an olive oil collection, milling, bottling, and storage center.
<b>HONEY</b>	<ul style="list-style-type: none"><li>• Jezzine Cooperative</li><li>• USAID</li></ul>	Training of Trainers (TOT) beekeeping program to sustain and increase the production of honey.

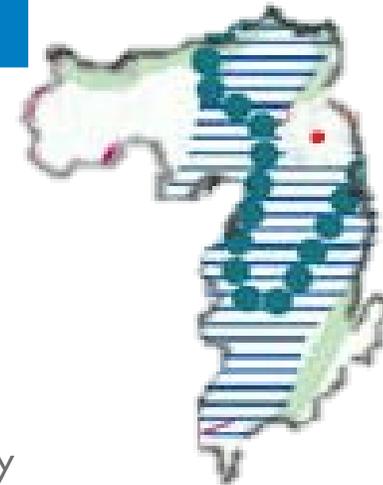
Tourism is also an important economic driver of the region which offers a regional park and important summer health locations...

MAP OF LEBANON'S TOURISTIC ATTRACTIONS | 2005



MAP OF JEZZINE DISTRICT TOURISTIC ATTRACTIONS | 2005

9 Pine Forests  
1 Oak Forest  
7 Hiking Trails

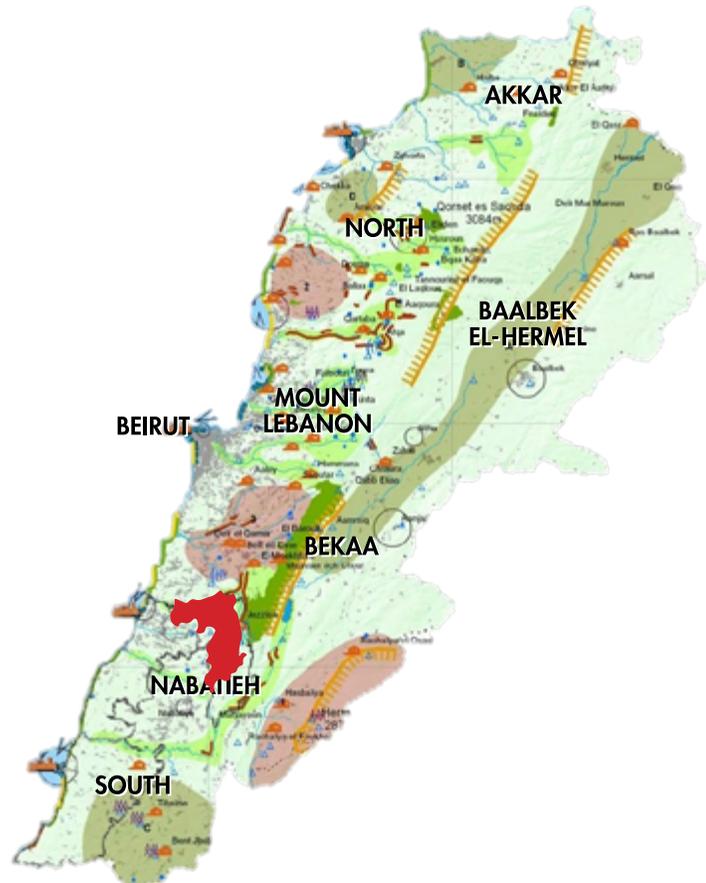


- Jezzine District
- Summer health, thalassotherapy
- Picturesque village
- ~ Cedars corridor
- Regional park

Source: Council for Reconstruction and Development, 2005

...in addition to the highest concentration of remarkable landscapes, including natural sites, cascades, grottos, and a picturesque village

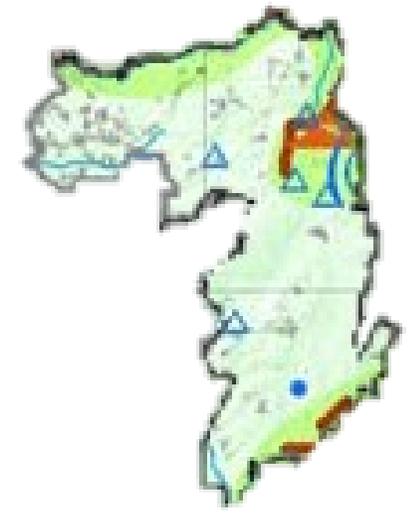
MAP OF LEBANON'S SITES AND LANDSCAPES | 2005



MAP OF JEZZINE DISTRICT SITES AND LANDSCAPES | 2005

10 Caves  
 3 Ancient Shrines  
 3 Ancient Mills  
 1 Citadel  
 Persian, Phoenician, and Roman Archeological Ruins

- Jezzine District
-  Summer health, thalassotherapy
-  Picturesque village
-  Cedars corridor
-  Regional park

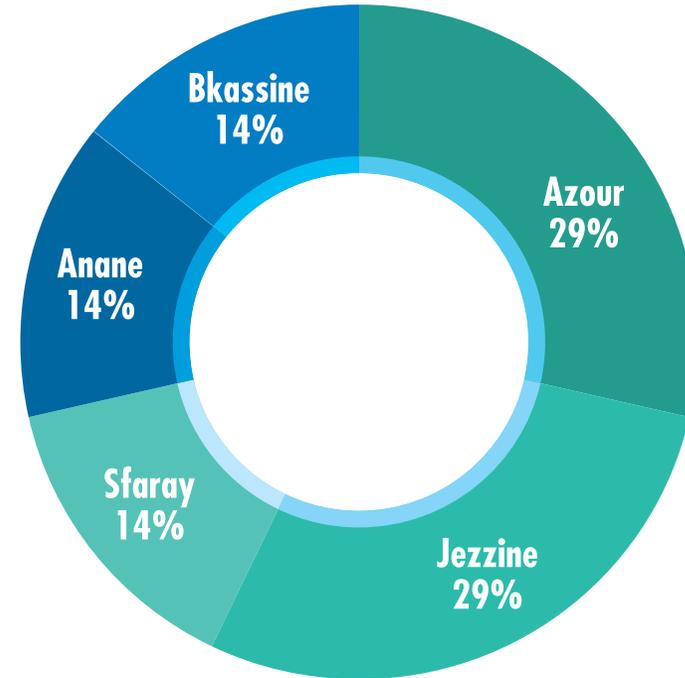


Source: Council for Reconstruction and Development, 2005

# Investment have taken place in 7 hotels mostly located in Azour and Jezzine villages...

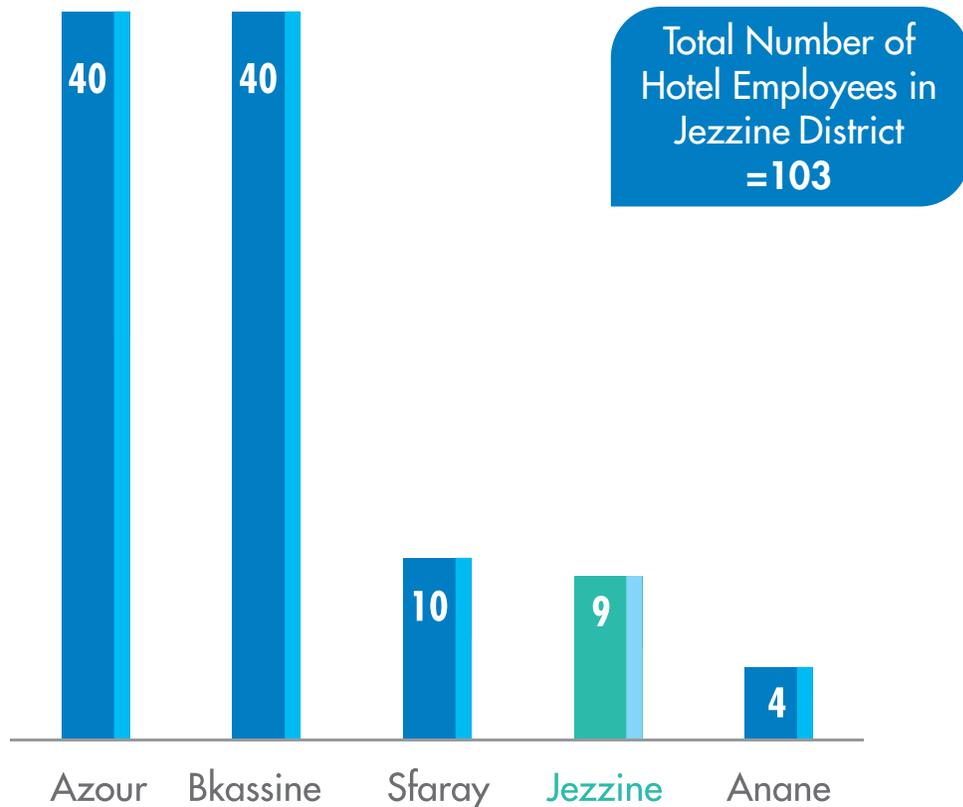


DISTRIBUTION OF HOTELS PER VILLAGE IN JEZZINE % | 2016

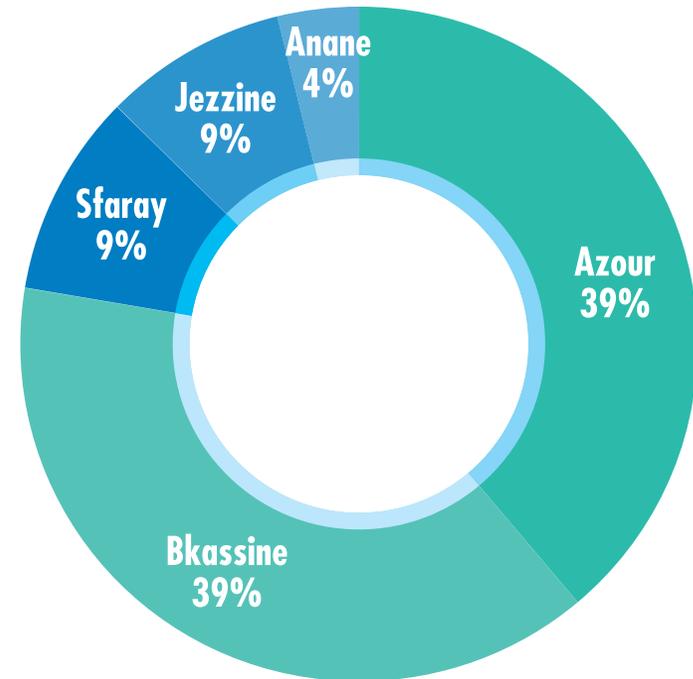


... and employing 103 people, with around 80% of them working in Azour and Bkassine villages

NUMBER OF HOTEL EMPLOYEES PER VILLAGE IN JEZZINE | 2016



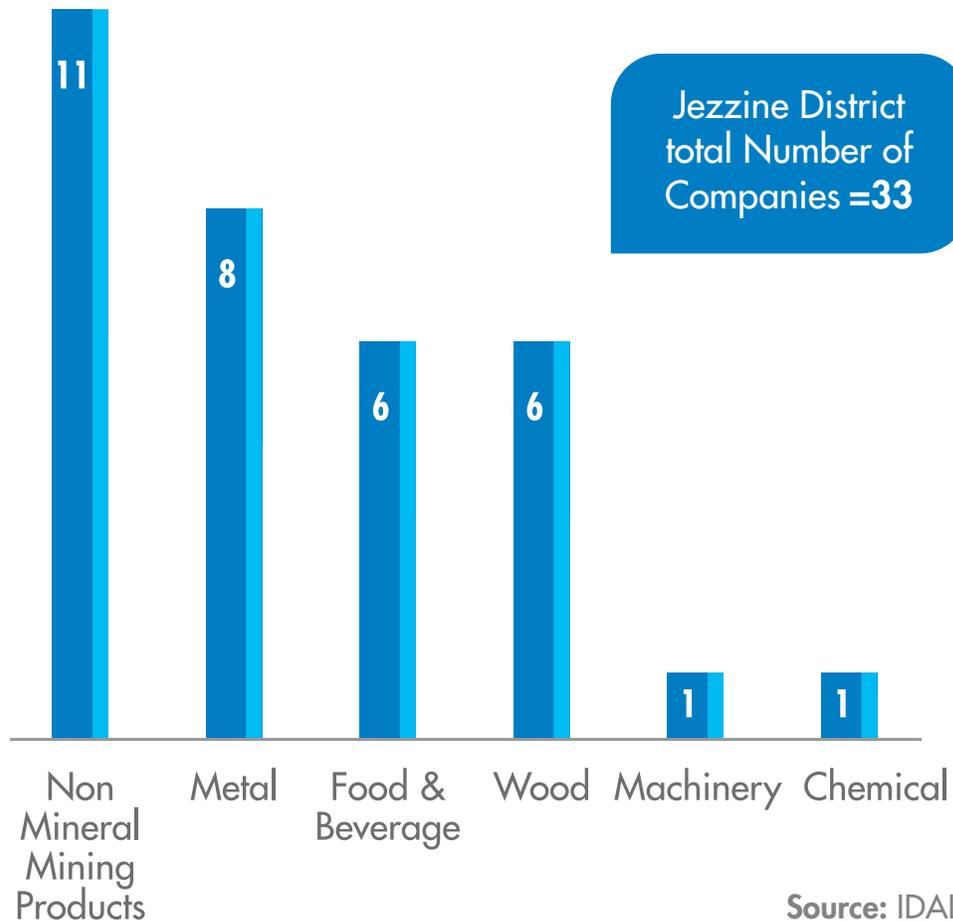
DISTRIBUTION OF HOTEL EMPLOYEES PER VILLAGE IN JEZZINE % | 2016



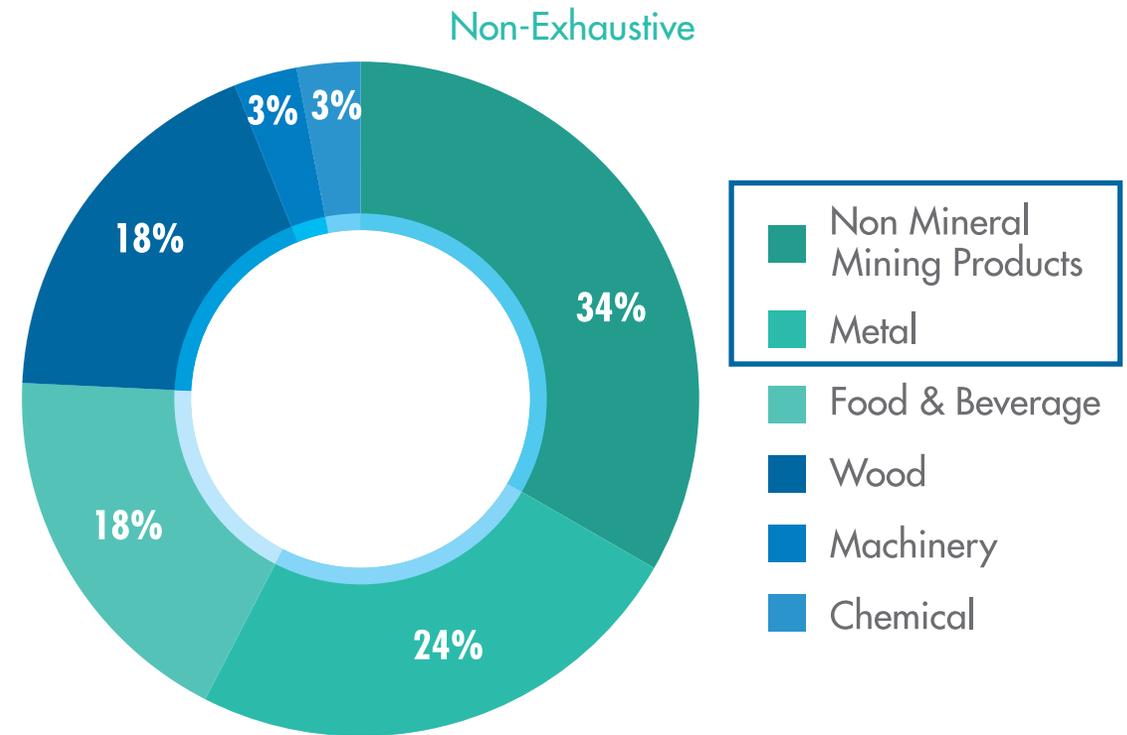
Source: IDAL Survey on Jezzine, 2016

# Individual activity is mostly concentrated in non-mineral and metal subsectors...

NUMBER OF COMPANIES  
BY SECTOR IN JEZZINE | 2016



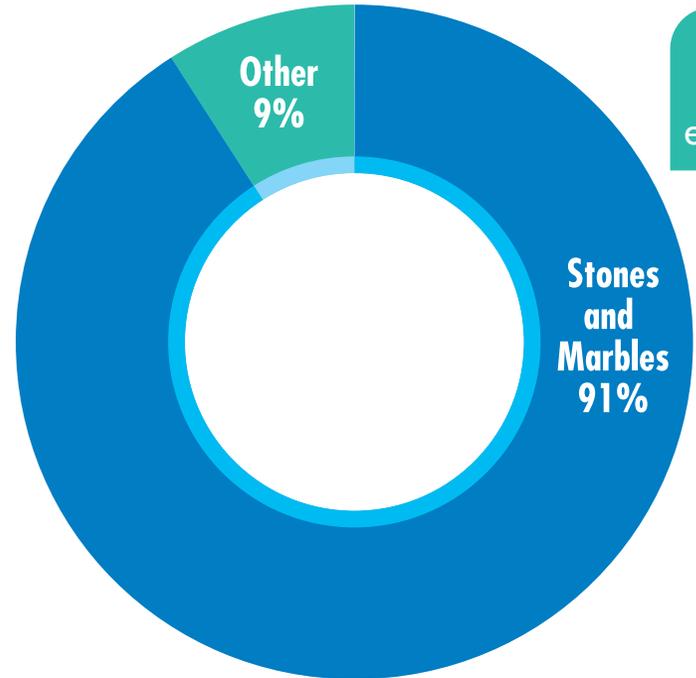
DISTRIBUTION OF COMPANIES  
BY SECTOR IN JEZZINE % | 2016



Source: IDAL Survey on Jezzine, 2016

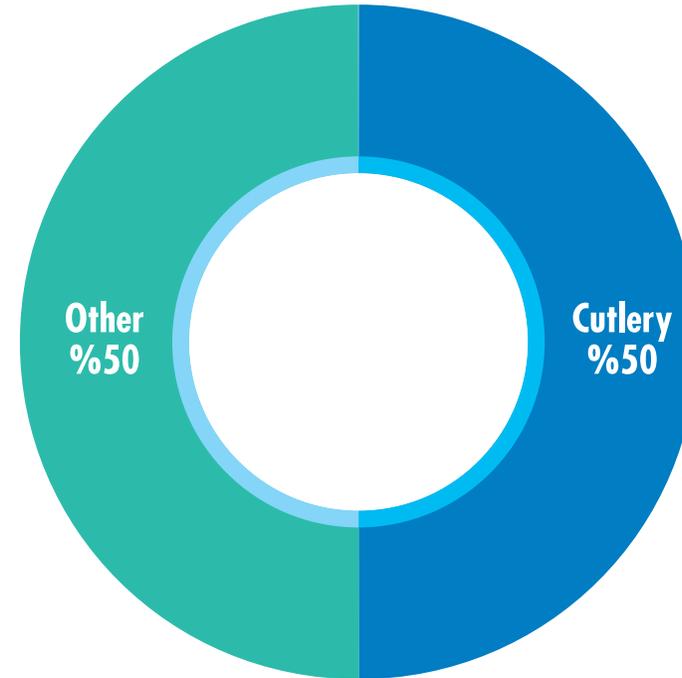
... with stones, marbles and cutlery most commonly produced providing the opportunity to develop a handicraft industry

DISTRIBUTION OF **NON MINERAL MINING COMPANIES** BY ACTIVITY % | 2016



Used in the local and external markets

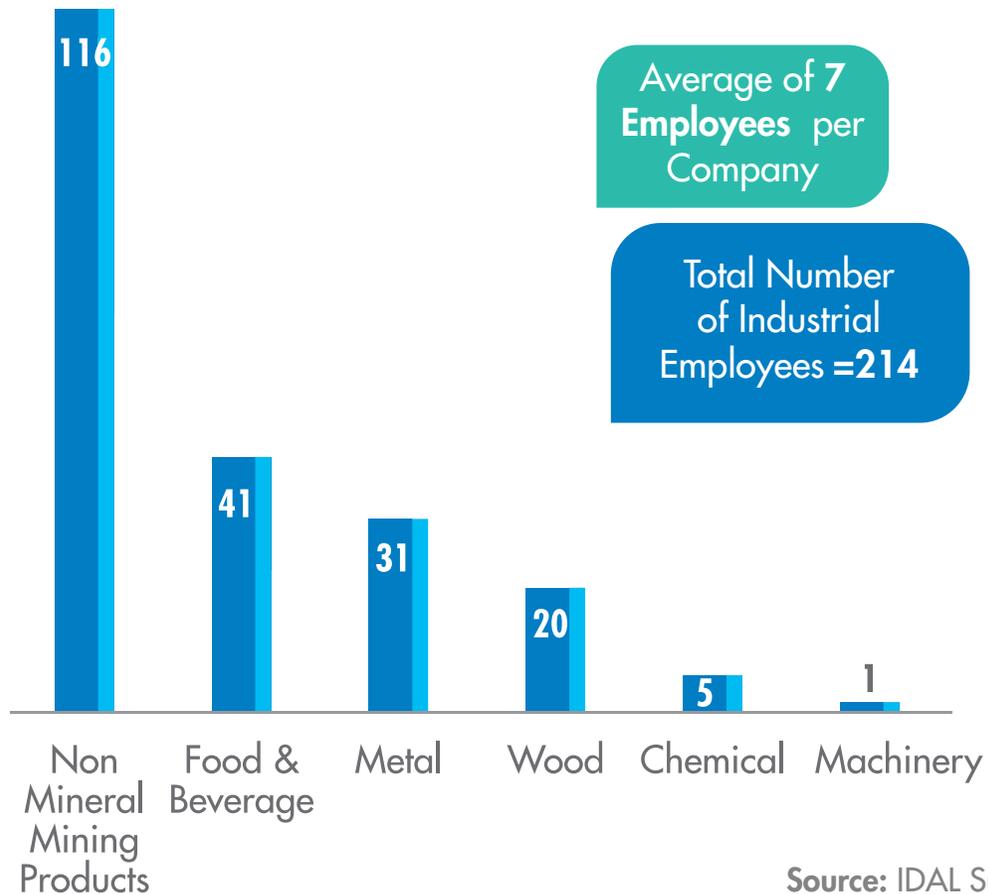
DISTRIBUTION OF **METAL COMPANIES** BY ACTIVITY % | 2016



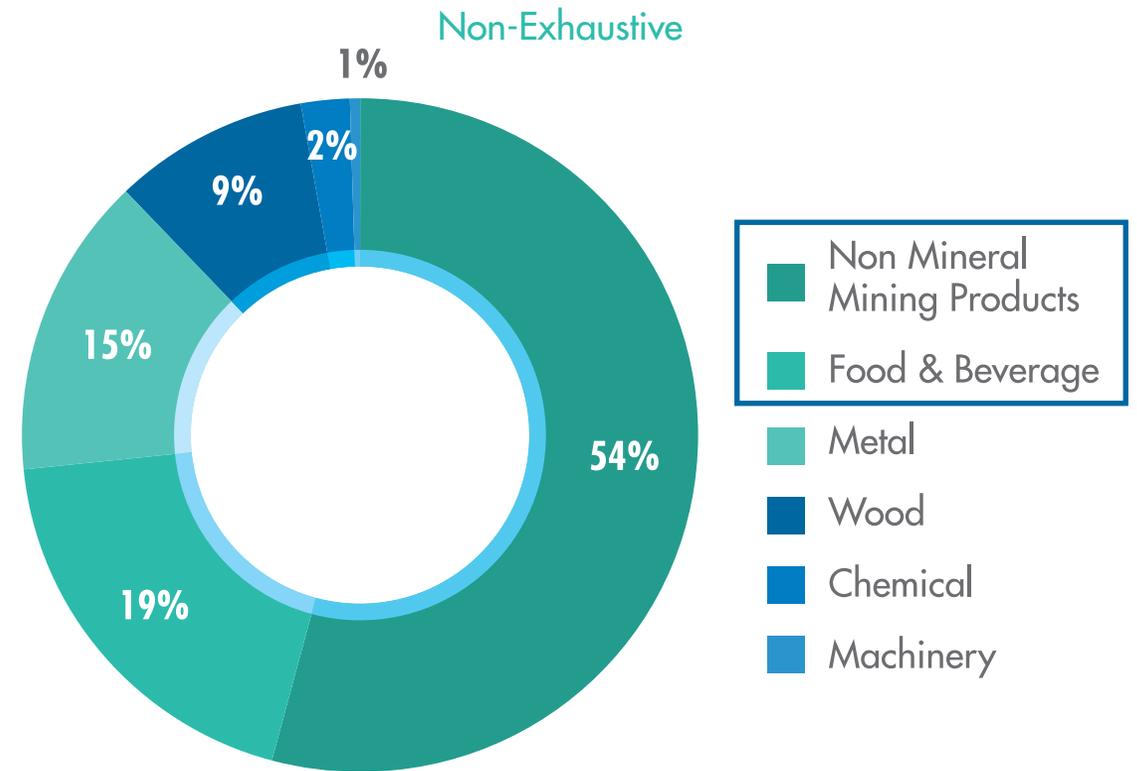
Source: IDAL Survey on Jezzine, 2016

# The majority of the labor force in Jezzine is engaged in non-mineral mining with some in food and beverage

NUMBER OF EMPLOYEES BY SECTOR  
IN JEZZINE DISTRICT | 2016



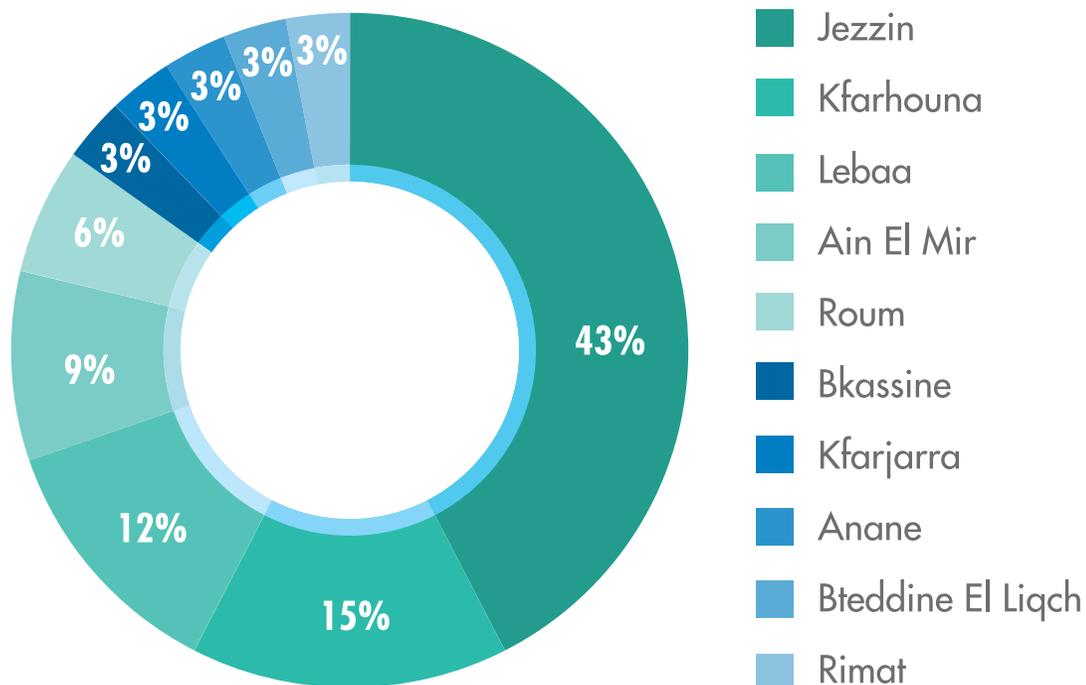
DISTRIBUTION OF WORKFORCE BY SECTOR  
IN JEZZINE DISTRICT % | 2016



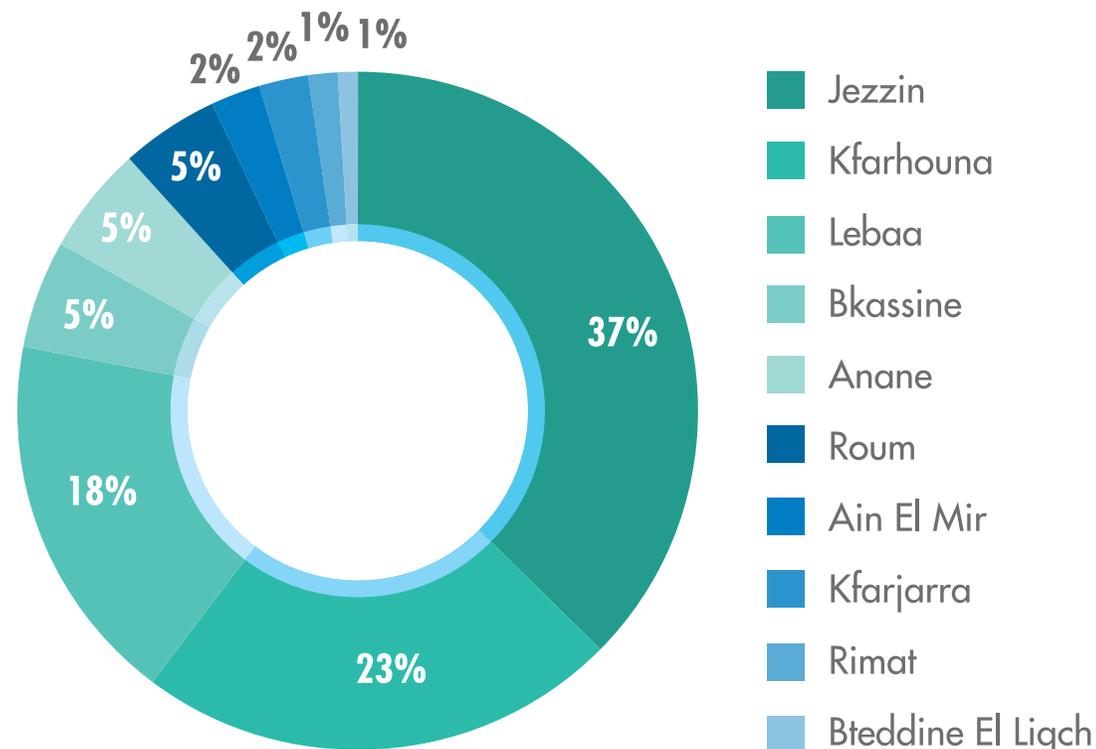
Source: IDAL Survey on Jezzine, 2016

# Jezzine city is the center of the industrial activities of the district, with around 40% of industrial companies and around 40% of total industrial workforce

NUMBER OF COMPANIES BY CITY  
IN JEZZINE DISTRICT % | 2016



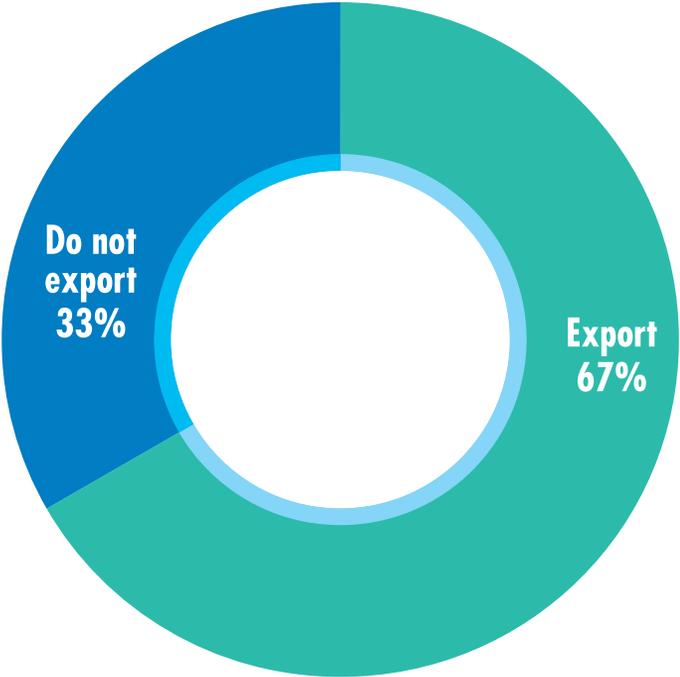
DISTRIBUTION OF EMPLOYEES BY CITY  
IN JEZZINE DISTRICT % | 2016



Source: IDAL Survey on Jezzine, 2016

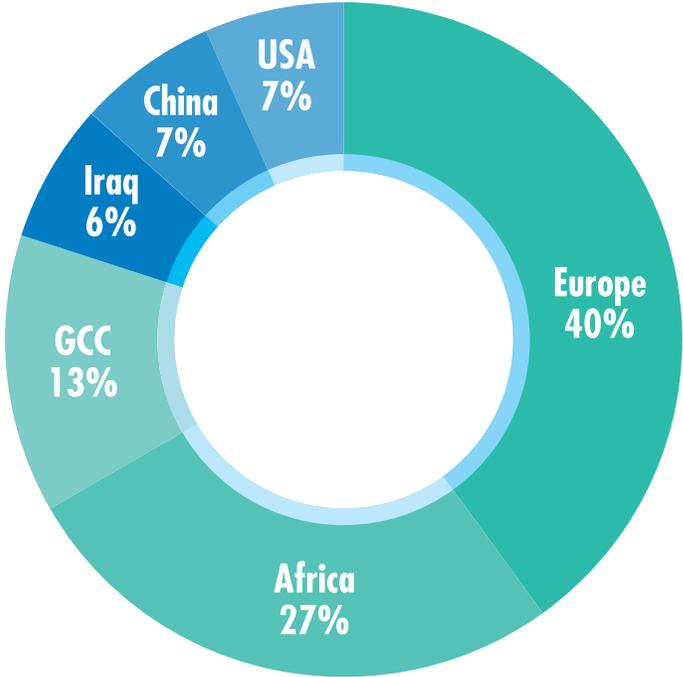
# The majority of industrial products manufactured in Jezzine are exported to Europe and Africa...

INDUSTRIAL COMPANIES THAT EXPORT THEIR PRODUCTS % | 2016



MAIN EXPORT DESTINATIONS OF INDUSTRIAL COMPANIES % | 2016

Non-Exhaustive

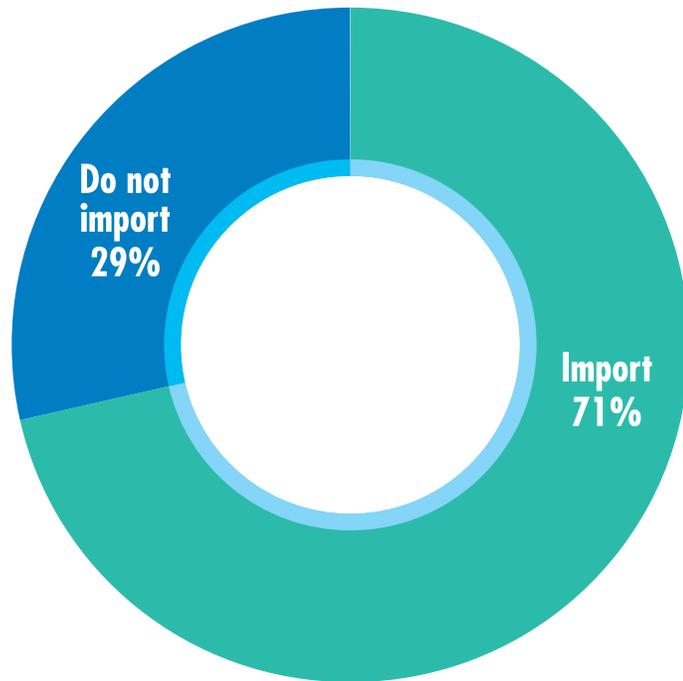


Number of Companies surveyed = 10

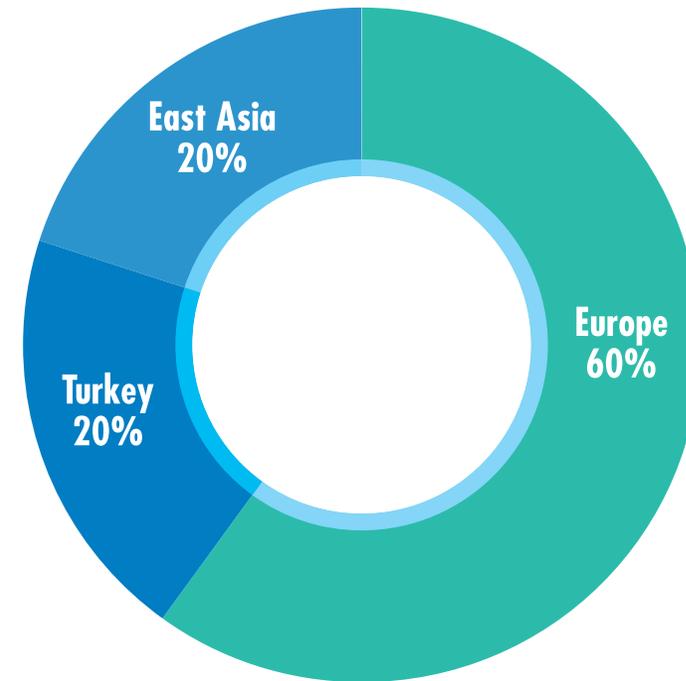
Source: IDAL Survey on Jezzine, 2016

... and with a large percentage relying on import of raw material from Europe

INDUSTRIAL COMPANIES THAT IMPORT PRODUCTS % | 2016



MAIN IMPORT DESTINATION OF INDUSTRIAL COMPANIES % | 2016



Source: IDAL Survey on Jezzine, 2016



## Strengths and Opportunities of the Jezzine District

### STRENGTHS

- Abundance of natural and water resources
  - Perfect climate conditions
  - Large proportion of agricultural territories
  - Largest production of pine nuts in Lebanon
- 
- Only Wine region in South Lebanon Governorate
  - Rich cultural heritage
  - Unique touristic landscape
  - Reputation of the stones and cutlery crafts
  - 30 min away from the port of Saida
  - High literacy rate
  - Reputation of Jezzine as a summer destination

### OPPORTUNITIES

- The Agriculture sector generates around 4.7% of Lebanon's GDP
  - In 2014/2015, world production of pine nuts achieved 39,950 MT, 86% up from 2004
- 
- The Agro Food sector is the largest industrial sector in Lebanon accounting for 18% of total industrial enterprises
  - Total contribution of the tourism sector to GDP was 25.1% in 2013, the highest rate in the region
  - The industrial sector accounts for 7.5% of national output and employs 25% of the labor force

# HEADLINES

1. BASELINE ANALYSIS OF THE JEZZINE DISTRICT

**2. INVESTMENT OPPORTUNITIES IN JEZZINE**

# The diversification of the Jezzine district results in a number of investment opportunities in key sectors

## 1 AGRICULTURE

- Investment opportunities in pine nut production

## 2 AGRO-FOOD

- Increased opportunities for olive oil and wine production due to the region's diverse topography, climate and fertile soil
- Investment opportunities in Goat Dairy products

## 3 TOURISM

- Investment opportunities in eco-tourism

# The largest pine forest in the MENA, Bkassine, provides opportunities for large scale production of pine nuts. There is currently only 1 processing/packaging facility in Jezzine

MAP OF BKASSINE PINE FORESTS



Size of Bkassine Pine Forest = 200 Ha

J.GROVE SERVICES TO PINE NUT PRODUCERS IN JEZZINE

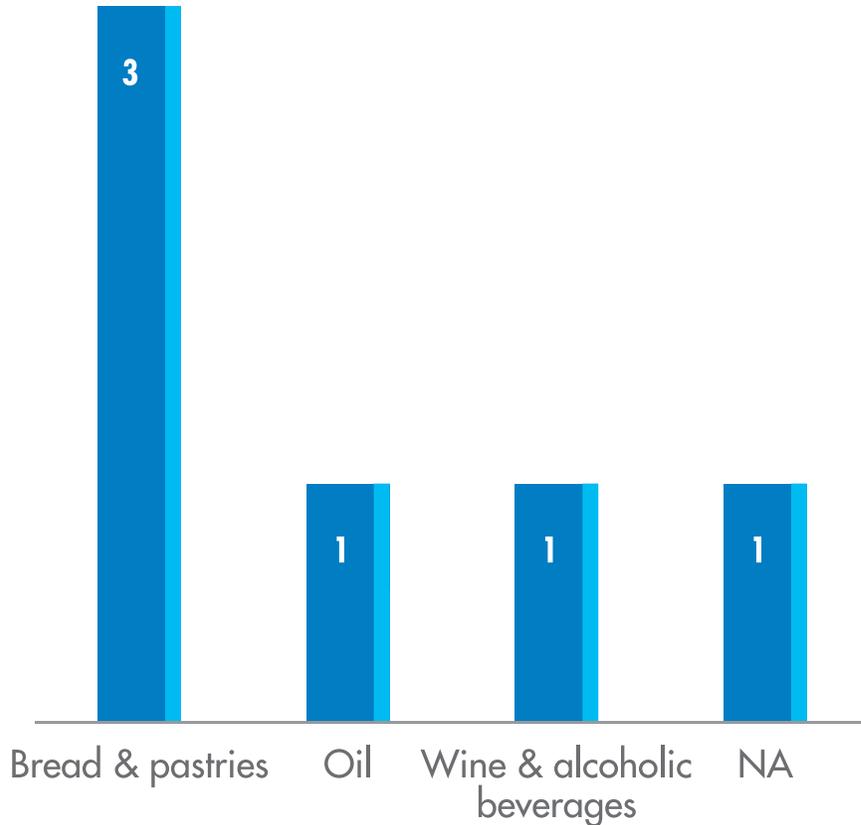


Source: Council for Reconstruction and Development, 2016  
Strategic Development Plan for Jezzine Region, 2012

Source: J.Grove, 2016

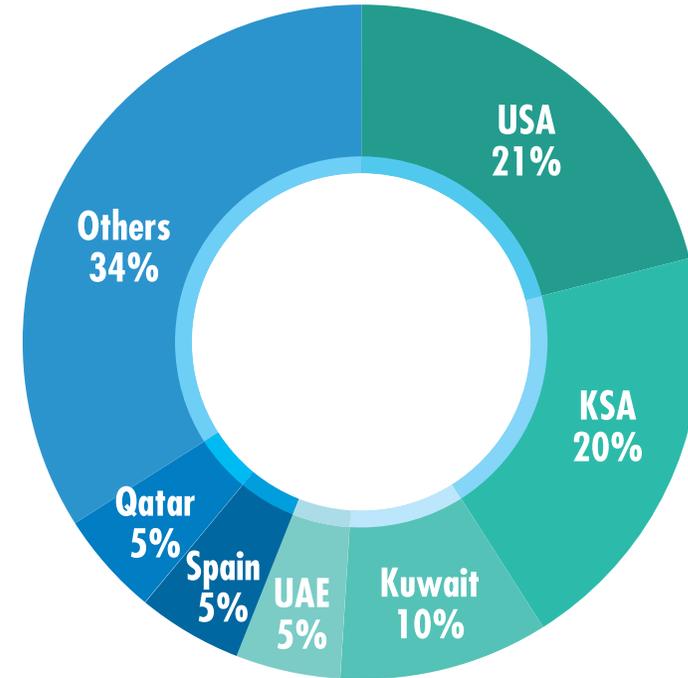
# Olive oil is amongst the most prominent Lebanese agro-industrial products with a high export potential, however there is only 1 olive oil producer in the region

FOOD AND BEVERAGE COMPANIES IN JEZZINE BY ACTIVITY | 2016



Source: IDAL Survey on Jezzine, 2016

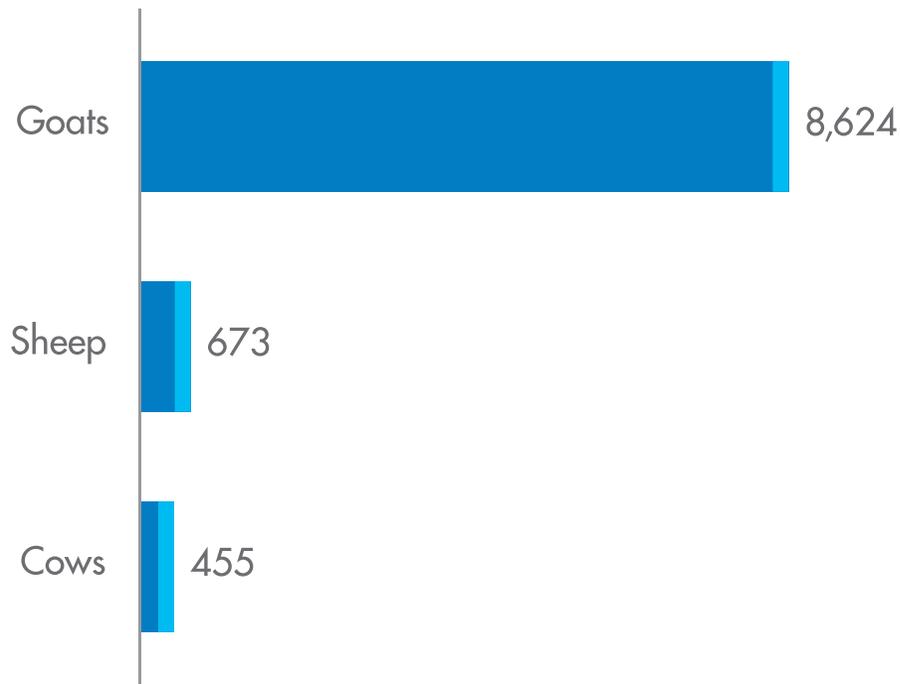
TOP DESTINATIONS OF LEBANESE OLIVE OIL EXPORTS % | 2015



Source: Lebanese Customs, 2015

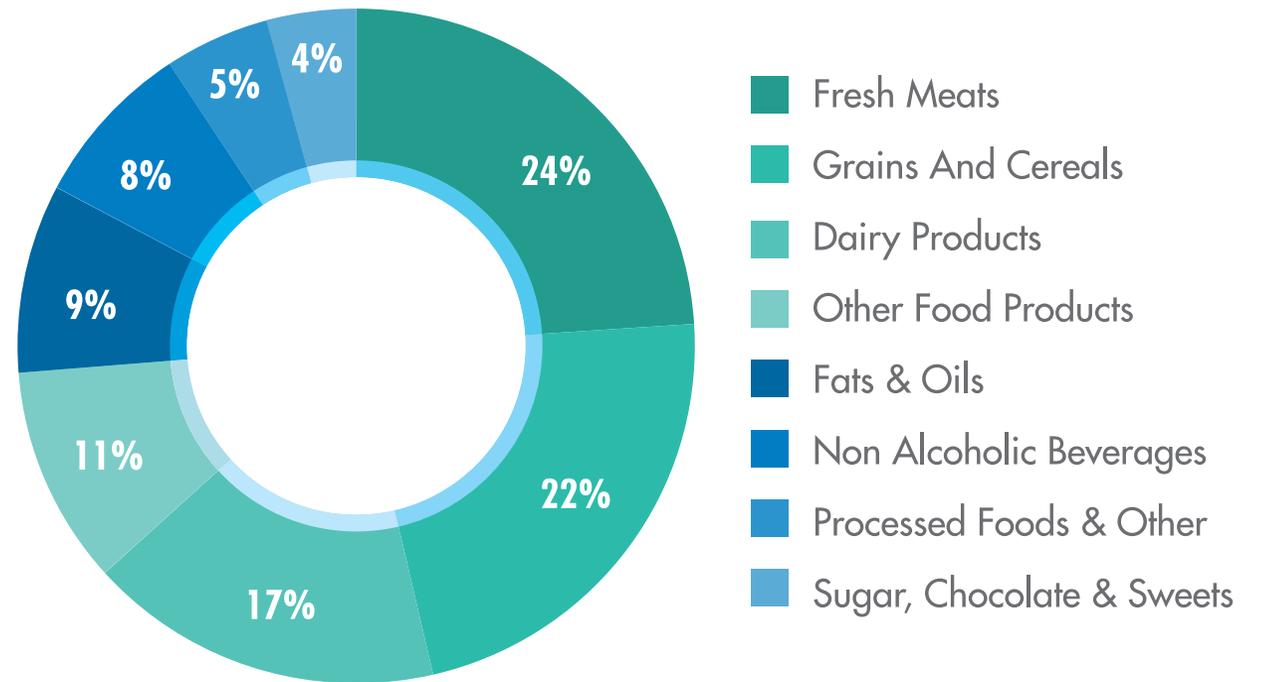
# Goat breeding is more extended than cow breeding in Jezzine and has a high potential to satisfy the large local demand for dairy products

MAIN ANIMAL BREEDING ACTIVITIES IN JEZZINE



Source: AFC Consultants, Jezzine Feasibility Study – Goat Dairy Plant

HOUSEHOLD CONSUMPTION BY TYPE OF PRODUCT %|2010



Source: Lebanese National Accounts, 2010

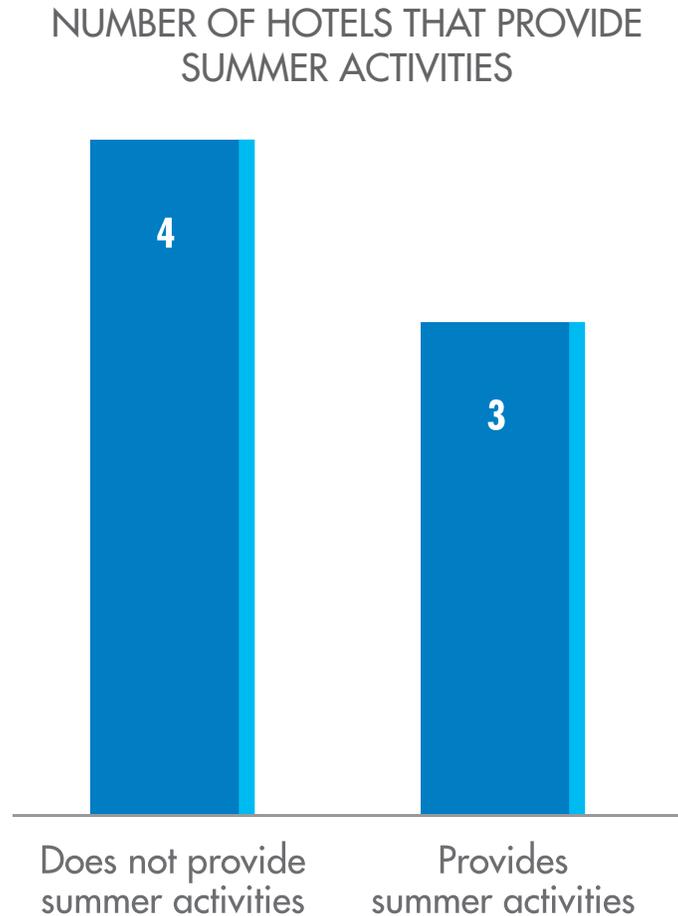
There is only 1 winery in Jezzine, but due to the importance of Jezzine as the only wine region in South Lebanon, other wineries have established vineyards in the area

GEOGRAPHICAL DISTRIBUTION OF  
LEBANESE WINERIES





Jezzine encompasses the majority of natural sites of South Lebanon, providing opportunities for eco-tourism and summer activities, however only 3 hotels cater for this need



Source: IDAL Survey on Jezzine, 2016

# CONTACT US

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