

# Lebanese Food Industries

Your Passport to Export Markets

**Lebanese-Brazilian Business Council**

BIEL Conference Center – Beirut – Lebanon

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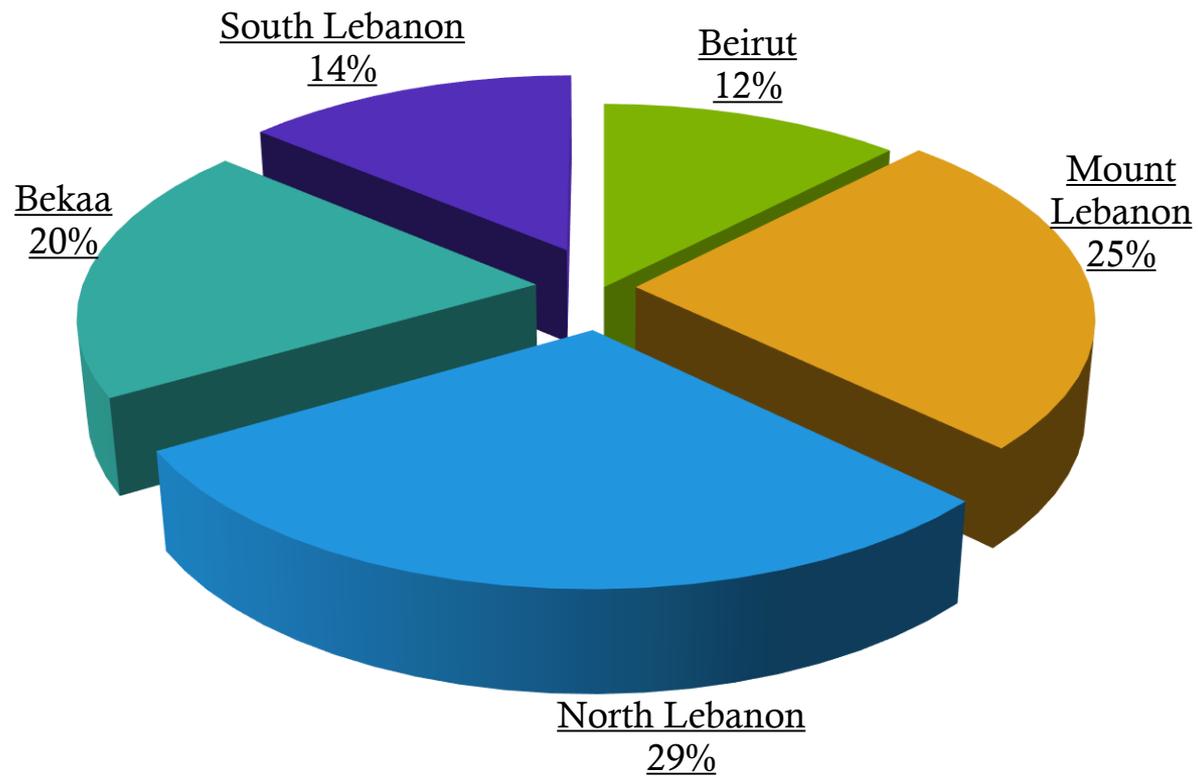
SLFI – General Secretary

# Fact & Figures

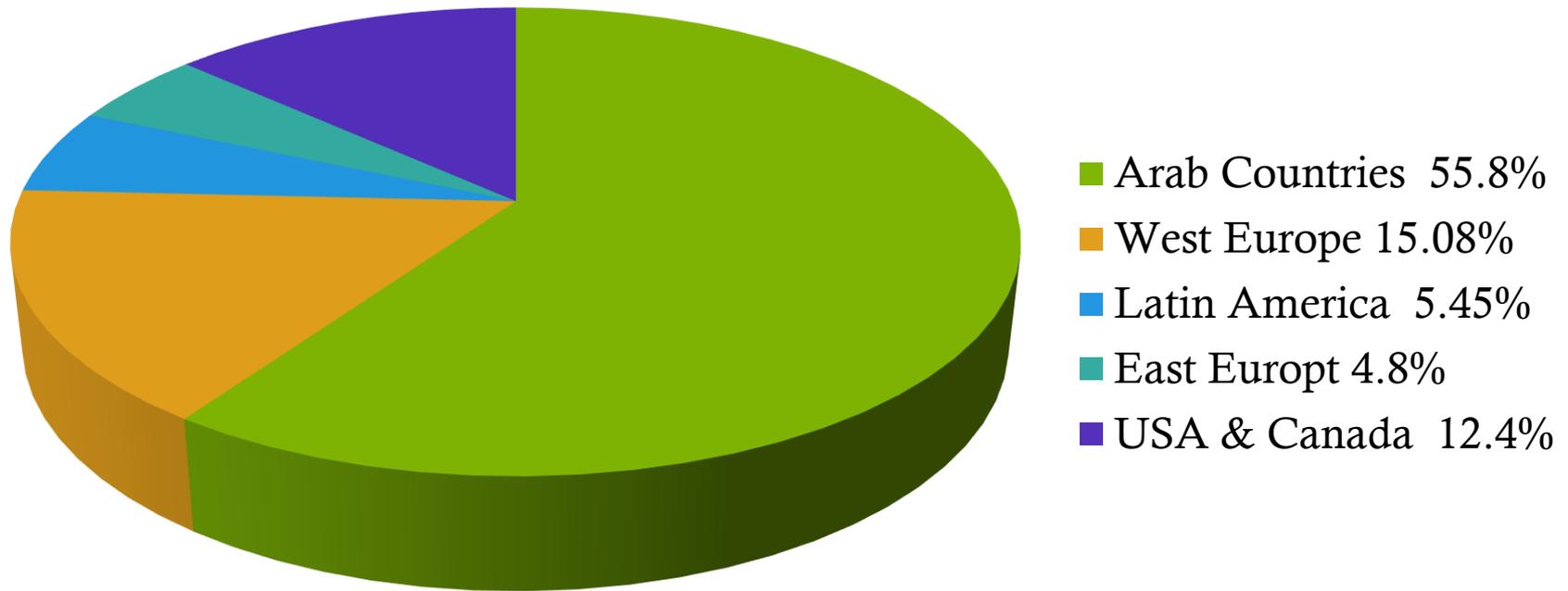
	Number	% of Total
FOOD FACTORIES	750	18.2%
WORKFORCE	20,700	24.9%
WAGES & SALARIES \$(000)	132,000	24.0%
OUTPUT \$(000)	1,750,000	25.7%
VALUE ADDED \$(000)	560,000	31.8%

Food Sector	Establishments		Workforce		Wages		Output		V. A.
	No.	%	No.	%	\$000	%	\$m	%	%
All	750	100	20,700	100	132,000	100	1,750	100	32
Meat & Poultry	14	1.9	1,650	8	10,810	8	142	8	29
Fruit & Vegetables	70	9.5	3,010	15	17,300	13	200	12	28
Oils & Fats	33	4.5	381	2	1,350	1	60	3	14
Dairy	112	15.2	1,925	9	9,730	7	155	9	18
Mills	32	4.3	586	3	3,500	3	190	11	16
Animal feed	15	2.0	145	1	685	1	25	2	24
Bakery	222	30.2	5,682	28	26,810	20	207	12	34
Confectionery	57	7.7	1,476	7	11,760	9	12	1	43
Drinks & Water	13	1.8	1,760	8	20,115	15	354	20	49
Wines	15	2.0	550	3	7,775	6	50	3	60
Alcohol	14	1.9	180	1	1,010	1	9	1	36

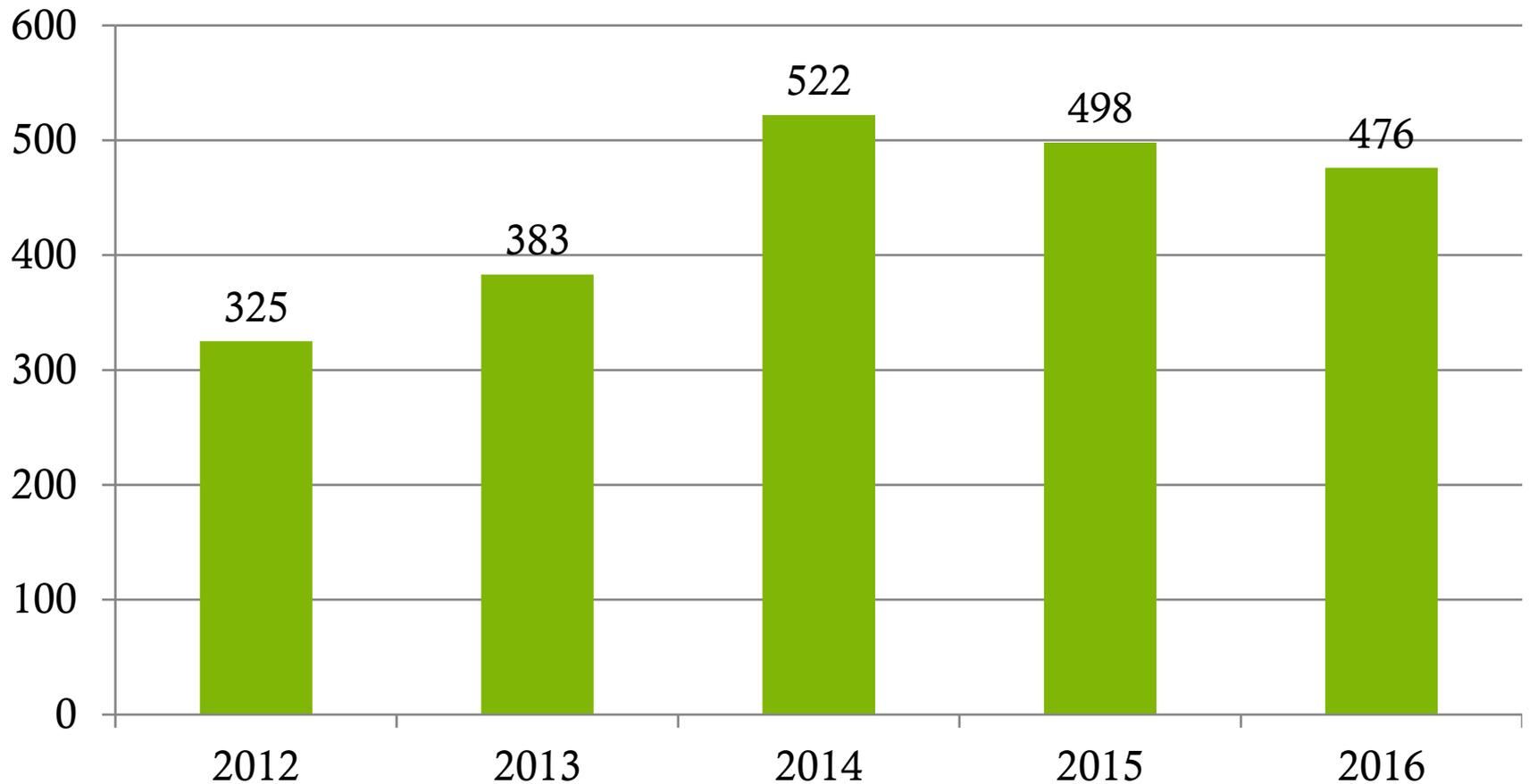
# Industries by region



# EXPORT DESTINATIONS

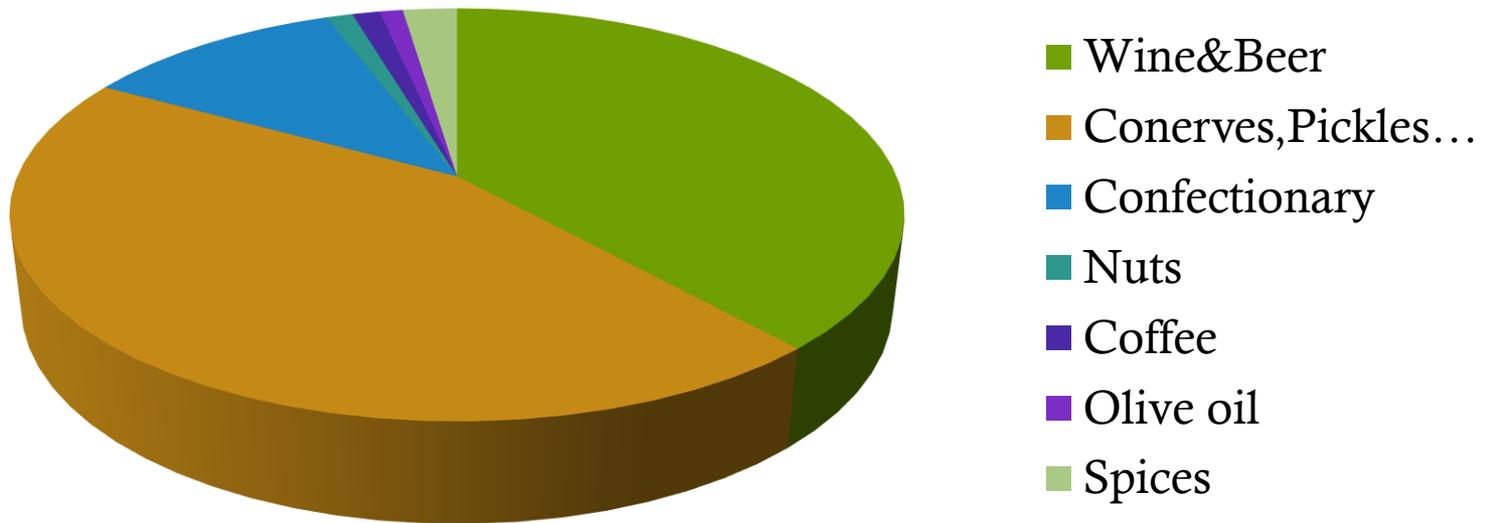


# EXPORT VOLUME ( Millions of \$)



# Export Distribution By Sector

**Sales**



# Strengths

- ◆ Climatic conditions and varied soil structures favor diversified agricultural produce.
- ◆ Export Oriented Industries with more than 75 various destinations.
- ◆ High caliber skilled labor and Food Technologies Operators.
- ◆ The strong image of the Lebanese food products in foreign countries such as the Gulf, EU and USA is relatively reputable.
- ◆ Lebanese and Arab Diaspora represent natural consumers.
- ◆ Support institutions and infra-structure including labs for testing and R&D centers in Universities and Chambers, and a vocational school specialized in Food Industries.
- ◆ International Exposure due to active participation in local and international fairs and exhibitions such as ANUGA, SIAL , HORECA, GULFFOOD, NYFFS.

# Weaknesses

- ◆ Lack of agricultural raw materials suitable for processing
- ◆ Poor farmer training
- ◆ High level of operating expenses.
- ◆ Absence of economies of scale compared to neighboring countries. (Majority of factories are small in size)
- ◆ Deficiency in supporting infrastructure, such as electricity, good logistics, and government waste collection services, good water supply, ...
- ◆ 85%-90% family businesses, classified as SME's.

# Opportunities

- ◆ Regional political situation and its implications.
- ◆ A Gateway to 350 M consumers Market (GAFTA) and 500 M (Euro Zone).
- ◆ Strong business ties with African countries through active Lebanese Diaspora.
- ◆ Growing awareness towards Lebanese and Mediterranean food consumption, labeled as healthy food.
- ◆ Bio Labeling – Mediterranean Diet.
- ◆ International and Local Support Institutions (Qualeb, USAID, LibanPack,...) to build a solid Quality infrastructure.
- ◆ The development of new products with higher values addition.
- ◆ Potential of products Geographical indication labels.

# Threats

- ◆ Regional political situation and its implications.
- ◆ The high speed development of neighboring countries competing for same markets.
- ◆ Unfair competition, risk of fraud.

# Syndicate of Lebanese Food Industrialists

- ◆ Founded in 1995.
- ◆ Represents 135 Food manufacturers .
- ◆ 85% of major food exporters.
- ◆ Official sponsor of Lebanese National Pavilions in International Food Fairs.
- ◆ Supports its members through several provided services.
- ◆ Represents its stakeholders' concerns to official authorities.

# Syndicate of Lebanese Food Industrialists

- ◆ Vision Statement: SLFI is dedicated to meeting the global and local needs and aspirations of its membership with a wide and selective range of modern market-driven services and initiatives, utilizing SLFI's considerable professional food-chain experience and global networking skills.
- ◆ Mission Statement: SLFI continuously strives to be the leading force in the development and growth of the Lebanese Agro-Food Sector, through promoting a clear quality and innovation culture.



Thank you for your attention