



**RFSAN**

***Syria Agricultural Production  
and Cross-Border Trade Study  
Roundtable Policy  
Discussions Report***

*25th February 2016*

*Amman, Jordan*



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Food and Agriculture Organization  
of the United Nations

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**REGIONAL FOOD SECURITY ANALYSIS NETWORK**

## Executive Summary

The Regional Food Security Analysis Network (RFSAN) Programme is funded by USAID and FAO and jointly implemented by FAO and iMMAP in order to provide a stronger evidence-base for programming and policy formulation.

On 25<sup>th</sup> February 2016, the RFSAN team organized a one-day roundtable discussion in Amman, Jordan to present preliminary findings from the “Syria Agricultural Production and Cross-Border Trade Study”.

The objective of the workshop was to review the preliminary findings of the study and to collectively analyze and discuss the implications of research findings for food security in the region, and arrive at a set of policy recommendations to be included in the study.

Participants included government officials from Ministries of Agriculture and Trade from Iraq, Lebanon and Jordan, Syrian experts working with UN ESCWA in Beirut, FAO Representations, private sector representatives, as well as an international NGO.

Key recommendations from the meeting are the following:

1. Capacity development (for farmers, processors, exporters) to upgrade agriculture along the value chain from production through to export.
2. Look to new markets in the EU and Africa for niche products.
3. Support agricultural community resilience in Syria through income generating projects.

# 1. Introduction

## 1.1 Background

Prior to the start of the Syria crisis in 2011, Syria used to be a transit route for agricultural exports from Jordan, Lebanon and Iraq to the black sea markets and the EU, and for Lebanon and Turkey, to Jordan and the Gulf. The Syria crisis has dramatically changed the dynamics of trade in the region. Traditional geographic areas of agricultural production in Syria have been affected by the war, new export routes have emerged, and trade volumes and flows have changed in the region.

To understand the new reality, RFSAN has conducted a Syria Agricultural production and cross-border trade study late 2015/ early 2016. The study aims to understand the new dynamics of the regional agricultural and food market as a result of the Syria crisis and the implication for food security. As well as analysing production, export and import values and volumes of agricultural and food trade in the region, it also looks at the trade routes for humanitarian and commercial agricultural and food products since the conflict and policy and business responses to the factors limiting product movement. The report is expected to be finalized in March 2016.

## 1.2 Objectives and expected outputs of the Syria Agricultural Production and Cross-Border Trade Study Roundtable policy discussions

**Main objective:** To present and discuss preliminary findings (quantitative trade and production data and qualitative research) to a group of agricultural trade and food security experts, and develop policy recommendations.

**Expected output:** To arrive at a set of policy recommendations to be included in the study.

## 2. Proceedings

### 2.1 Opening

Mr Andrea Berloff (Senior Emergency Coordinator, FAO Jordan) welcomed all participants and emphasized the importance of a regional forum to discuss agricultural production and cross-border trade in the context of the Syria crisis.

Mr Rene Verduijn (Chief Technical Advisor, RFSAN) - and chairperson for the day - took the floor and provided a background on RFSAN outputs and activities in the Syria sub-region. He introduced its three programme objectives that include: (1) Food security and livelihood information products; (2) Networking and consensus-based situation analysis; and (3) Strengthened capacities of government and non-government partners. Mr Verduijn introduced some of the main products generated including various food security & livelihood surveys, food markets surveys, food security early warning maps and harmonised price monitoring maps across Syria. These and other products can be found on the RFSAN website [www.rfsan.info](http://www.rfsan.info).

### 2.2 Presentation of findings

Ms Aurelie Walker-Dean presented key findings from the report.

The author presented the methodology for the report and stated that the agricultural production data was sourced from FAO STAT database while agricultural trade data was sourced from the UN Comtrade database for Iraq, Jordan, Lebanon and Turkey. She informed the participants that agricultural trade data included fresh and prepared foods, fertilizers and agro-chemicals. Mirror trade data (trade data reported by partners) were used for Syria and Iraq, however, because some of Iraq's key partners have not reported regularly for the last few years, trade data for Iraq were not entirely reliable. Other information (including changing trade routes, transportation costs and emerging agri-food export destinations as the conflict progressed) was sourced from reports and key informant interviews.

### Agricultural production trends 2005-2014

#### Total agricultural production value

Total agricultural production value (constant 2004-2006 1000 US\$) had increased between 2005-2013 by 23% in Iraq, 40% in Jordan, 0% in Lebanon,

24% in Turkey and decreased by 21% in Syria. As a whole, agricultural production in the sub region had increased by 17%.

### Fruit production volume

In 2013 the fruit production volume in the sub region had increased by 21% from the 2005 value. The greatest increase was seen in Iraq (50%) in most part, the increase could be attributed to renewed agricultural investment by government, followed by Syria (25%) which was said to be attributed to the maturing citrus trees planted before the conflict had begun, and harvested in relatively secure government held areas of Syria.

### Vegetable production volume

In 2013 the vegetable production volume in the sub region had increased only by 2% from the 2005 value. The largest increase was seen in Jordan (34%) whilst Syria's production dropped by 35% as a result of challenges brought about by conflict.

### Cereal production volume

Between 2005-2013 cereal production in the sub region remained stable overall although marked differences could be observed at the national level as countries pursued different cereal production strategies. In 2013 Syria experienced a 52% drop in production from 2005 values as a result of the conflict. Turkey's production dropped by 10%. Iraq and Jordan have compensated for the drop in production in the sub region and increased their cereal production by 64% and 11% respectively.

### Livestock production volume (heads of cattle, sheep and goats)

Heads of livestock produced in the sub region increased by 28% over 2005-2014. Iraq increased heads of livestock by 92%, Jordan 54%, Lebanon 21% and Turkey 33% whilst Syria decreased its heads by 4%, but this seems like a conservative estimate given other reports.

### Conclusion

The livestock and fruit sectors saw the strongest growth performance over 2005- 2014 and 2005-2013 respectively, with little change in the vegetable and cereal sectors. The negative growth in Syria and slow growth in the sub region in the cereal and vegetable sectors can directly be attributed to the massive drops in production inside Syria of 52% and 35% respectively during the crisis.

## Agricultural trade value trends 2005-2014

### Agricultural Import Value Trends

Agricultural imports into all countries increased over 2005-2014. Imports into Syria and Iraq increased until 2011 when both countries experienced drops in agricultural import values of 34% and 15% respectively in 2014. All import values peaked in 2008 most likely as a result of the hike in international food prices. This 2008 peak was also mirrored in export values.

### Agricultural Export Value Trends

Jordanian export values are significantly higher than Lebanon, Syria and Iraq because of the quantity of fertilizer exported that is included in the statistics. Agricultural exports including fertilizers accounted for an average of 62% of Jordan's total trade 2011-2014. Fertilizer exports are the top agricultural commodity exported in most years from Jordan. Agricultural exports from Jordan increased by 6% during the crisis period 2011-2014.

Agricultural exports from Iraq are shown to be relatively static, but this could be a reflection of the quality of the data rather than a true trend. Syria's exports decreased by 58% 2011-2014 such that exports accounted for 13% of total trade in 2014. Lebanon and Turkey's agricultural exports both increased by 23% over the crisis period.

### Livestock Trade Trends 2005-2014

The data shows a clear inverse relationship between Jordanian and Syrian livestock exports. Syrian exports started to decline from \$437 million in 2005 to \$97.4 million in 2009, but decreased to \$13.9 million in 2014. Jordanian exports started increasing in 2007 from \$3.7 million to \$437 million in 2014. Jordan has captured the livestock export market previously held by Syria, specifically in Saudi Arabia.

Livestock imports into Jordan over the same period increased rapidly. Interviews suggest that Jordan has imported live animals (mainly from the USA) to fulfill domestic market needs, whilst the homebred 'Awassi' sheep have been destined for the export market.

### Cereal Trade Trends 2005-2014

After Turkey, Syria exported the greatest quantity of cereals in the sub region, valued at its peak in 2007 at \$240 million. From then there was a decline to only \$0.2 million in 2014. There have not been unexpected changes in cereal exports from the other countries in the sub region.

Cereal imports into all countries follow a general pattern of import highs in 2008 (at the time of a global spike in food prices) and import lows in 2010. Syrian cereal imports dropped by 66% from 2011 to 2014, while cereal imports into Jordan increased by 65% over the same period. Some analysts suggest this increase in Jordan is in response to the increased demand resulting from the population growth of 10% since the start of the Syria crisis.

### Conclusion

Data suggest that the value of Jordanian and Lebanese agri exports were not negatively affected by the Syrian crisis 2011-2014. However it is necessary to review 2015 trade data for the most recent picture as both countries would have been negatively impacted by the closures of the Jordan-Syria and Jordan-Iraq borders.

An interactive map that shows the global trade flows can be find on this [link](#).

## Syria Cross-Border Agricultural Trade 2005-2014

### Syria Cross-Border Agricultural Imports 2005-2014

Total cross-border agricultural imports started to decline from 2011 as did total imports. The share of cross-border agricultural imports in total imports however rose from 23% in 2005 to 46% in 2014. Between 2008-2012 the greatest value of agricultural imports came from Jordan, followed by Turkey, then Lebanon. In 2013 agricultural imports from Turkey started to increase significantly.

The rise of Turkey into the top 5 total agricultural import partners after 2011, and to top cross-border partner from 2013 could reflect the volumes of humanitarian aid (food baskets and flour) entering Northern Syria from Southern Turkey. The increased concentration of recorded agricultural imports from Turkey in total agricultural imports to 30% in 2014 stresses the importance of the border crossing to feed the Syrian population during the crisis.

Lebanon increased exports to Syria over the crisis period by 21% whereas Jordan decreased exports to Syria by 32%. For Lebanon, this could reflect Lebanese exports capturing the market inside Syria close to the border that was previously supplied by domestically produced Syrian products that are either no longer available or can no longer be accessed because of differing areas of control. For Jordan, this could reflect the products destined for re-export that could no longer transit through Syria.

Although individually Turkey, Lebanon and Jordan range in the top 10 agricultural import partners, as a bloc the sub region is the largest import partner for Syria in all years under review.

### Syria Cross-Border Agricultural Exports 2005-2014

Jordan has consistently been the top cross-border agricultural export partner for Syria. While cross-border agricultural exports from Syria have decreased by 45% over 2011-2014, the share of cross-border exports in total agricultural exports from Syria has increased from 17% to 45% demonstrating the importance of Syria's land borders for export and therefore livelihood opportunities to Syrians with access to border crossings.

Cross-border exports peaked in 2010 but commenced their descent during the early crisis period. Exports to Jordan and Lebanon picked up slightly in 2013 but decreased again in 2014. Exports to Turkey only started to increase in 2014.

### Conclusion

The rise in importance of cross-border trade partners in Syria's trade profile highlights the potentially catastrophic consequences of any closure or further trade restrictions applied to border crossings on the food supply and livelihoods in Syria. Informal trade is not registered in these calculations, suggesting that the real share of cross-border trade in Syria's total agricultural trade volume could in fact be considerably higher.

### Trade partners and commodities traded

The structure of trade in terms of partners and commodities has remained relatively static.

### New Trade Routes

Jordan, Lebanon and Turkey transported agricultural produce overland through Syria to reach their final export market destinations. Jordanian produce transited through Syria to reach the Syrian port to be exported to Europe and the Black Sea area, and also carried on through to Lebanon. Lebanese produce transited through Syria to reach Jordan and through Jordan to the Gulf. Turkish produce transited through Syria to reach Jordan, Lebanon and the Gulf. The operational status of the physical border crossings and the inability of goods to transit cross line through Syria to reach destination markets has stimulated a quest for new markets and new transport routes and modalities.



Fresh fruits and vegetables that transit in refrigerated trucks have a shelf life that cannot be extended making alternative, affordable trade routes that do not extend the transit times hard to find. Non-perishables can travel alternative routes if the cost and lead times are acceptable.

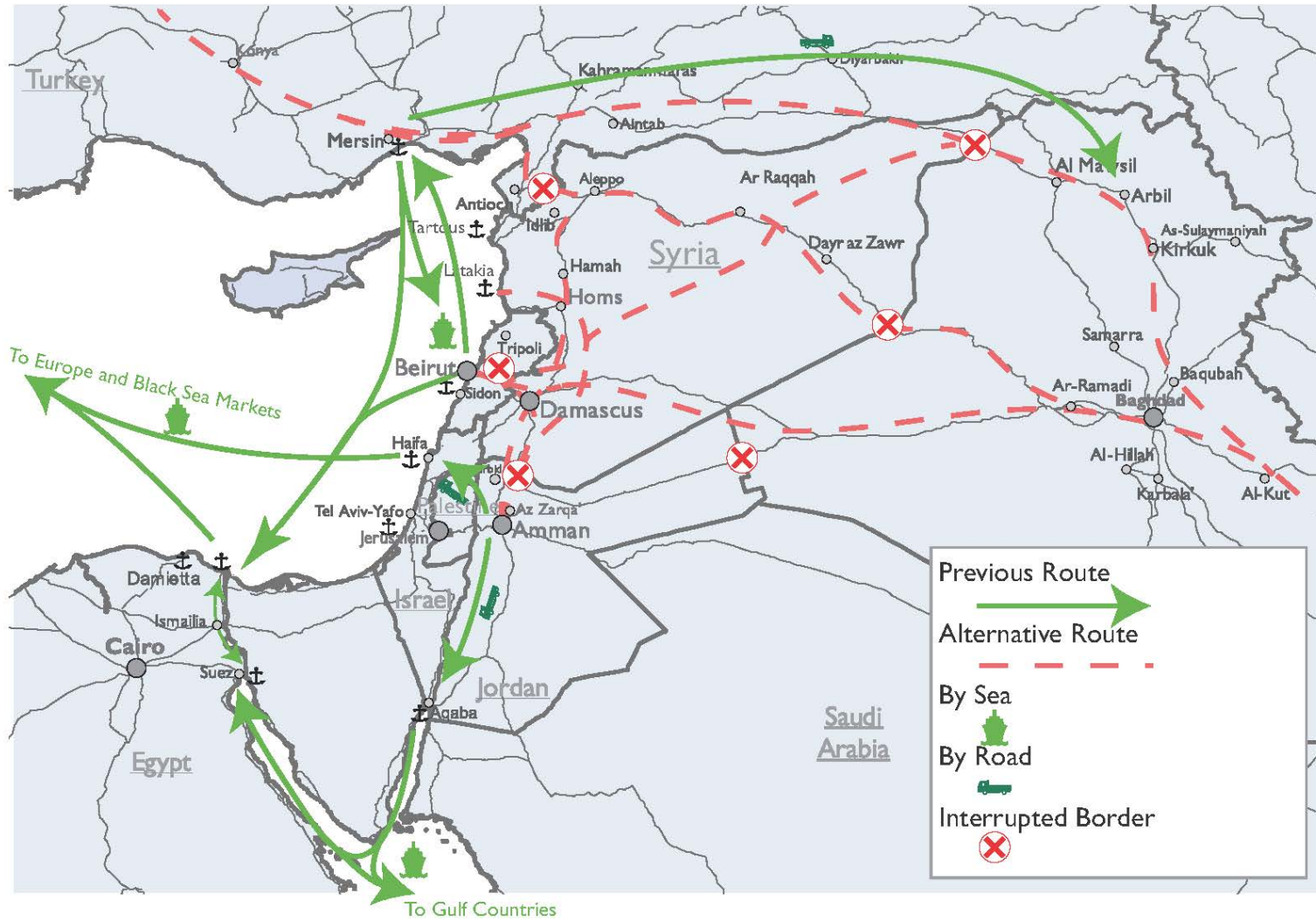


Figure 1 Map of former and alternative trade routes

## Jordan

### Alternative Maritime Transport Routes and their Destination

#### 1. EU and Black Sea area markets

Jordan → Haifa port    Haifa port → EU/Black Sea area

or

Jordan → Aqaba port    Aqaba port → Suez Canal → EU/Black Sea area

#### 2. Iraq market

Jordan → Aqaba port    Aqaba port → Red Sea port    Red Sea port → Iraq

Jordanian importers and exporters have tried maritime trade routes as alternatives. Neither of these alternative routes have acceptable lead times for fresh produce. Jordanian exporters reported higher costs, difficulty in accessing the Haifa port in Israel and Haifa port infrastructure. Goods crossing the King Hussein /Allenby Bridge border 'back to back' have to change trucks at the border, which adds significant costs. Jordanian exporters and importers report that border controllers can return goods on an ad-hoc basis causing large financial losses to trucks loaded with perishable goods, and that Haifa port only offers a limited capacity of its infrastructure to Jordanian products.

Although Aqaba port in Jordan is accessible to Jordanian produce, the lead times are high to destination markets in Europe and the Gulf. Furthermore, Aqaba port costs are high, which off set the reduction in sea freight prices that have arisen from the global economic slowdown.

Solutions that have emerged are finding new markets and niche markets that can be accessed by airfreight. The Russian sanctions on EU and latterly on Turkish products, have opened the Russian market to Jordanian produce, and a growing wealthy, health conscious class in the Gulf that want to buy fresh, high-end organic produce, elegantly packaged and labeled, has opened a niche market opportunity for freighted products.

But challenges remain with choosing to enter Russian and Gulf markets. Trade with selected Russian business partners that consistently report company losses will not be insured. A Jordanian exporter cannot take the risk of not insuring his/her trade and therefore cannot always complete a trade deal in Russia. The Gulf market is a globally, but not regionally integrated market,

creating competition for Jordanian products from highly competitive major exporting countries such as Thailand, Brazil and South Africa. Although the government of Jordan has been active in trying to open new markets for agricultural produce by negotiating trade protocols with better terms of trade (lower tariffs and non-tariff barriers) e.g. with Russia, financial support for exporters is absent.

## Lebanon

Syria was a key transit route for Lebanese products to Iraq and the Gulf (both through Iraq and Jordan). Goods transported overland through Syria made up 35% of all of Lebanon's exports. They are affected by both the insecurity in Syria and the closure of the Syria-Jordan and Jordan-Iraq land border. Maritime transport has provided an alternative trade route to land transport.

### Alternative Maritime Transport Routes and their Destination

#### 1. Turkish markets

Beirut port → Turkish ports

#### 2. Jordanian market

Beirut port → Suez Canal → Jordan

#### 3. Gulf markets

Beirut port → Suez Canal → Gulf

The government of Lebanon has extended a 21 billion Lebanese Pound treasury credit line to subsidize the difference between the land-route transport costs before the border closures and the shipping cost, for both agricultural and industrial exports to the Arab countries. However, the lead times for fresh produce are not acceptable when transported by sea. Some For this reason exporters have turned to air freight, although it is costlier.

## Turkey

Turkish products transited by road through Syria to reach Lebanon, Jordan and parts of Iraq. Today maritime transport delivers non-perishables to Lebanon and Jordan.

### Alternative Maritime Transport Routes and their Destination

#### 1. Lebanese market

Turkish port → Lebanese port

#### 2. Jordanian market

Turkish port → Suez Canal → Aqaba

Multinational companies based in Gaziantep serving 90+ markets globally have not been affected by the loss of small markets in Jordan and Lebanon. Some have made up for the loss of these markets in winning tenders delivering humanitarian aid to Syria, others have suffered more from the global economic slowdown than the Syria crisis. In addition, the government of Turkey provides subsidies to all exporters to increase the competitiveness of Turkish goods.

## Conclusion

In conclusion, the impact of the closure of Syria as a transit route on Jordanian, Lebanese and Turkish products depends on a combination of several factors. These include the efficiency and cost in the maritime ports (e.g. Aqaba, Suez and Beirut), political relations with Israel, the level of government support, the size of the businesses exporting, the quality of produce that can make it financially viable for air freight, and the level of processing of the product.

## Cross-Border Humanitarian Aid: Challenges and Opportunities

Cross-border access to some of the 8.7 million people in need of food security assistance inside Syria (OCHA figures as of January 2016) is invaluable at a time when access cross-line inside Syria is not possible. Cross-border humanitarian food aid delivered into Syria in 2015 amounted to 75,649 metric tonnes of bread/wheat flour and 487,105 metric tonnes of food baskets (as reported to the UN food security coordinating body). However, access still remains a challenge, especially as security risks are increasing at Ramtha - the one official border crossing designated to Jordan under the UN Security Council resolution 2165. A single authorized border crossing from Jordan into Southern Syria may risk meeting the objectives of accessing people in need in Southern Syria.

## Question, Answer and Discussion of Findings

Various participants shared further information about trade in their respective countries during the Q&A and discussion session:

Jordanian participants said that the trade picture had changed in 2015, when farmers faced great losses as a result of the border closures with Iraq and Syria. They offered to share 2015 trade data with RFSAN to update the trade data to reflect their losses.

It was added that Syria and Turkey used to serve as re-packing and re-exporting centres for agri-food products originated in Lebanon and Jordan. It would be interesting to assess the impact of the Syria crisis on such facilities too. It was suggested that the author could also look at a series of price averages as well as trends over the ten-year period. Participants also encouraged analysis of trade volume as well as value. More information on the costs of lack of access on transport and employment would also be interesting. It was highlighted that a substantial proportion of agricultural exports from Syria has been transformed into smuggling and largely goes unreported.

### **Thematic Breakout Sessions**

Participants were asked to join either the agricultural production group or the cross-border agricultural trade group. Specifically, they were asked to answer the following questions;

- 1 What have been the current challenges to, and opportunities for /cross-border trade / agricultural production presented by the Syrian crisis
- 2 What (policy) responses have been tried?
- 3 Were they successful, and why (not)?
- 4 What (additional) challenges and opportunities do you foresee in the future?

Participants prepared feedback to share in plenary.

## Plenary Reporting

### Cross-Border Trade Breakout Group

(1) What have been the current challenges to, and opportunities for cross-border trade presented by the Syrian crisis

Challenges	Opportunities
<b>(All) The Iraq-Syria, Jordan-Iraq and Jordan-Syria border closures have had a significant impact on trade. Food prices in domestic markets have fallen because of the surplus on the domestic market, placing serious pressure on farmers. The prices of some products no longer cover the cost of production.</b>	(JO) Exploratory studies are underway to explore new markets such as the African and European markets, subject to the demand and supply potential of the trade relationship. Potential entry into African markets would involve export through Aqaba, but could not then include perishable goods. More investigation is needed as to which specific niches exist for Jordanian products.
(JO) Post-harvest quality control is low.	(JO) Haifa port has provided export opportunities.
(JO) Exporting perishable foods through Egyptian ports is problematic because of the speed of handling; A consignment from Jordan to Russia took 9 days and the delay destroyed the content.	There is potential for humanitarian cash & voucher assistance programs to boost host economies by stimulating local markets.
(JO) Breaking into new markets can take years.	(JO) There is a potential opportunity for revived trade with Syria following an improvement in the access constraints posed by the crisis.
(IQ) Imports are now coming from Turkey, and Iran but the costs are higher than importing from Syria and Jordan. Land is still chosen as the preferred transport option due to greater potential for refrigeration, shorter transport times and lower costs.	(JO & LB) The markets that Syria lost as a result of the war can be filled by other countries, for example Jordanian livestock exports have replaced Syrian livestock exports into Saudi Arabia.
(LB) The boycott of Israel blocks trade routes through Israeli ports. The only trade routes are through the Syrian border, which pose significant transit	(LB) Bilateral agreements for partnership between Lebanon and the Gulf countries, or the EU are being looked at for the short-term

**risks and fees, and Lebanese ports. Therefore, the best alternative is maritime transport. But the costs of shipment, service fees and taxes are high.**

**Although demand from some parts of Syria has increased, the markets in safer parts of Syria are very similar to Lebanon and are therefore in direct competition with Lebanese imports.**

**(JO) Jordan is weak in agri-food manufacturing and processing, so mainly raw lower value products are exported.**

**(All) Air & maritime freight is complex and expensive. Goods can end up at their destination already damaged because of improper handling and packaging.**

**(JO) Aqaba port is overwhelmed and under-resourced for the current trade volumes diverted from Syria.**

**(JO) Israel blocks Jordanian exports to Palestine, restricting market access opportunities.**

**(LB) No functioning governance system in Lebanon means that any new policy setting remains difficult.**

**(JO) EU phyto-sanitary standards are too high for Jordan to meet, restricting market access opportunities.**

**(ALL) There have been huge losses to the transportation sector since the border closures.**

and can potentially save the situation while waiting for a political solution to the Syria crisis.

(JO) Capacity building and technical assistance for Jordanian farmers and investment promotion could help to grow the manufacturing/processing sector and export higher value items, if there is a market for it.

Demand from Syria has increased, as goods previously sourced from other parts of the country can no longer be accessed.



(2) What (policy) responses have been tried?

The government of Lebanon has extended a 21 billion Lebanese Pound treasury credit line to subsidize the difference between the land-route transport costs before the border closures and the shipping cost, for both agricultural and industrial exports to the Arab countries, mainly through Saudi Arabia's Doha port. No information was available on its effectiveness.

The government of Jordan has funded studies to explore new markets. Subsidies for air freight are being explored. It has seasonal trade restrictions to protect Jordanian farmers from cheaper imports when products are in season. The government has also signed bilateral agreements with other countries to facilitate trade.

The government of Iraq has been heavily impacted by the drop in the price of oil and political instability before the start of the Syria crisis. It has been investing in large-scale agriculture. Iraq is however import dependent and has reduced import barriers (fees and restrictions) to comply with regional trade commitments. Government loans are available to farmers.

(3) Were they successful, and why (not)?

The interventions were not evaluated during the session.

(4) What (additional) challenges and opportunities do you foresee in the future?

Participants viewed the future scenario as bleak, as an end to the conflict is not foreseen.

### Agricultural Production Breakout Group

(1) What have been the current challenges to, and opportunities for, agricultural production presented by the Syrian crisis

Challenges	Opportunities
<b>(JO) Closed borders have lowered the price of some domestic products flooding the local market in season.</b>	(JO) Syrians brought new ideas (e.g. processing) to Jordan.
<b>(JO) Prices have increased of key products that were imported from Syria or Lebanon.</b>	(JO) Export opportunities in the Gulf have opened up.
<b>(JO) Syrian workers lowered the agricultural wage in the labour market.</b>	

**(LB) Protection issues have emerged as a result of children and women working in agriculture.**

**(IQ) High costs of production and low returns have resulted in farmers leaving agriculture and moving to rural areas.**

**(IQ) Some agricultural areas are now under ISIS control. Products from these areas are not necessarily consumed inside Iraq. Some are smuggled into Syria.**

**(SY) There are many challenges to production inside Syria. Some existed before the crisis such as water shortages for irrigation and poor quality of produce. Since the war, the cost of tools that are no longer produced inside Syria and are now imported has increased; the cost of fuel has increased; the cost of transport has increased; labour is less available as people join armed groups; insecurity restricts farmers' access to land; and supply of seeds has decreased by 60%. As a result, production has increased by 50% over the crisis period. 40% of livestock was smuggled to Jordan and Lebanon during the first 3 years of the conflict.**

(2) What (policy) responses have been tried?

Jordan: No direct agricultural subsidies can be provided, as Jordan is a WTO member and bound by WTO rules but the government is supporting the new agricultural projects, through tax exemptions. The Ministry of Agriculture held a series of workshop for farmers to organize production on a national level, but unfortunately this was not successful in changing farmer behaviour.

Syria: The government still offers subsidies, but 60% less than before the war. Russia has reduced the tax on Syrian fresh food imports by 80%.

Iraq: The government guarantees prices for certain crops.

(3) Were they successful and why (not)?

Participants did not address question 3 in the break away group.

4) What (additional) challenges and opportunities do you foresee in the future?

Participants viewed the border closures and further insecurity as obstacles in the future. No opportunities were foreseen.

### National Breakout Sessions

After lunch, participants formed two break away groups by country (Jordan & Lebanon and Iraq & Syria). They were asked to answer the following questions:

- (1) What are the possible **recommendations** to overcome the challenges, and capitalize on new opportunities, presented by the Syrian crisis on agricultural production and agricultural trade? Humanitarian priorities were also discussed for Syria.

Participants then shared their feedback in plenary.

#### Plenary Reports

##### I. Jordan and Lebanon Cross-Border Trade:

Both countries could do more to operationalize existing Free Trade Agreements.

Jordan can move away from traditional markets such as Iraq and Syria towards EU and Africa. Jordan could subsidize air freight costs for fresh produce and provide assistance to exporters to attend trade fairs.

##### II. Jordan and Lebanon Agricultural Production:

Contract farming could be a way to access the EU market. Through capacity building, Jordan could also increase its focus on higher value added products, diversify products and varieties, improve extension services, standardise production, improve quality control and improve packaging for export markets. Both countries could encourage knowledge transfer from Syrian refugees.

Lebanon could make better use of the existing refugee farmers increasing its agri-production in its bordering areas to Syria. Often, these refugees were seasonal immigrants working as farm labourers before the conflict. Now, they are non-seasonal. This complicates matters, as the current legislation transfers farm ownership to the farmer if a farmer continues to work on the same land more than 10 years. Syrian refugees may qualify for this so many Lebanese are reluctant to let Syrians work their land. With a change in legislation, taking

out this clause, Syrians could again become an important labour asset to the Lebanese agriculture.

### III. Iraq and Syria Cross-Border Trade:

Removing sanctions on agricultural inputs (e.g. seeds, fertilizers, pesticides, irrigation equipment) for crop and livestock production is necessary to reduce costs of production. Quality control needs to improve to re-start exports. Both countries will benefit from the land borders opening again.

### IV. Syria Agricultural Production:

More rural developmental projects that can generate income could be financed such as through loans or credit to households to start a small family business. Support can be given to financial institutions that support farmers. There is a need to separate military actions and agricultural activities. Fuel needs to be made available by addressing the number of brokers in the supply chain and extension services need to be provided to farmers to modernize production. Refugees in camps in neighbouring countries can be given the right to work in the camp. Some can set up small processing units to make, for example, tomato paste. A 'Made in Zaatari camp' label can be used to market these products.

### V. Iraq Agricultural Production:

Iraq can increase investment to upgrade factories to produce agricultural chemicals, and upgrade irrigation infrastructure. Water agreements can be made with neighbouring countries to increase the water available in southern and mid areas of Iraq.

### VI. Humanitarian interventions

Humanitarian interventions should consider greater support to markets in order to assist people in regaining their livelihoods using a value chain approach.

## Closing

The chair person summarized the discussions of the day and closed the round table discussions reminding participants that only a fraction of the issues had been addressed and that there was more work to be done. He thanked the participants for their open and insightful contributions.