MIGAL Survey Assessing Impact of Gaza War on Israeli Farmers: Full Results

.

A digital survey was administered by [Dr. Adam Abramson] of Migal Galilee Research Institute and Haya Rak Yahalom, Manager of MOP Tzafon, and distributed via social networks and government agricultural channels (SHAHAM). **389** farmers responded to the survey from all regions of the country. The survey itself can be accessed here (Hebrew only).

The results of the survey are as follows:

- **Regions impacted:** While Israel's Gaza and Northern regions have been the hardest hit, nearly all Israeli farmers have experienced disruptions to their farming operations and/or economic performance.

- **Extent of the impact:**
  89% of Israeli farmers have experienced some form of damage to their farms.
  96% of Israeli farmers expect to experience damage in the coming 3 months, with **34%** of them expecting high to very high levels of damage.
  In the Gaza area, **77%** of Israeli farmers expect high to very high levels of damage

- **Main challenges:** the top 3 challenges faced by Israeli farmers since October 7th include: 1) Disruptions to the workforce (52%); 2) Disruptions to markets (16%); and 3) Physical access to their farms (11%). Specifically, **72%** of Israeli farmers have experienced disruptions to their **workforce, 37.3%** of have experienced disruptions to their marketing channels, **23.4%** have experienced difficulty accessing their farms (primarily near the Gaza strip and the northern border), and **18.5%** have had difficulty moving produce from their farms

- **Expected economic damages since October 7th:**
  - **Production: 76%** of farmers estimate a loss of agricultural production. The average loss estimated is **35%.** In the Gaza area, the average loss is estimated at **70%**
  - **Income: 86%** of farmers estimate a loss of income. The average loss is estimated at **35%**. In the Gaza area, the average loss is estimated at **69%**.

- **Potential solutions:**
  - 34% of Israeli farmers are interested in directly marketing their produce
  - 37% of farmers are interested in hosting volunteer workers on their farms
  - **36% of respondents shared ideas of how to solve some of these challenges.**

Highlights of their suggestions include:

WorkForce:

- **Increasing the number of foreign workers:**

1) Bringing foreign workers from a broad variety of countries rather than just from Thailand (Philippines, Eastern Europe, etc.) to increase flexibility and reduce dependence upon any one market
2) Allowing the Thai who worked here before to return with a longer time period, and to increase employee quotas
3) Enable and give grants to foreigners who want to stay in the country

- **Increasing the number of Israeli workers:**

1) Encouraging a broader cross-section of Israelis to enter the agricultural market by providing financial incentives and training
2) Targeted outreach to certain high-potential groups (e.g. ultra-Orthodox who do not enter the military)
3) Allowing the farmers with different crops that ripen at different times of the year to exchange labor
4) Allow the construction of residential units for Israeli workers

Government policy decisions:

Given that the recovery is expected to be a long process, the State must formulate both short-term and long-term support plans. The elements of these plans must include:

- Defining **food security** as a **national priority.**
- Reducing barriers to marketing and allow direct marketing
- Subsidizing Israeli workers
- Reducing the price for water and subsidizing other inputs (pesticides, etc.)
- Institutional compensation
- Reducing import of vegetables and fruits
- Supporting economic liquidity for farmers: 1) Delaying tax payments (Social Security employers, income tax, etc.); 2) Cancelling employer tax; 3) Providing direct subsidies to farmers regardless of the size of the farm and not specific creditors/services
- Establishing reasonable minimum prices for agricultural produce
- Creating a logistical center or packing house for produce, with quality checking.
- Funding shelters for farm workers in the fields
- Encouraging and supporting branding for local manufacturers of Israeli produce and agricultural products over time
- Reducing the bureaucracy for the establishment of greenhouses, including “fast-track” legal courses for planning and construction
- Participation in the purchase of labor-saving equipment (e.g. 80% participation)
- Provision of Emergency Water and hay pools to dairy farms to feed their livestock during times of emergency
- Encouraging cooperation among packing houses, including the creation of a nationwide and/or regional central system for agricultural produce and employee regulation

Access:

- Organizing security to enable farmers to access their farms in militarily challenged areas in order to carry out damage control, irrigation, fertilization and picking. Flexibility in entry permits to the fields and orchards.
- Opening dialogue with military forces to maximize access to fields in these areas.

Graphical representation of the results

Figure 1: Distribution of respondents by region

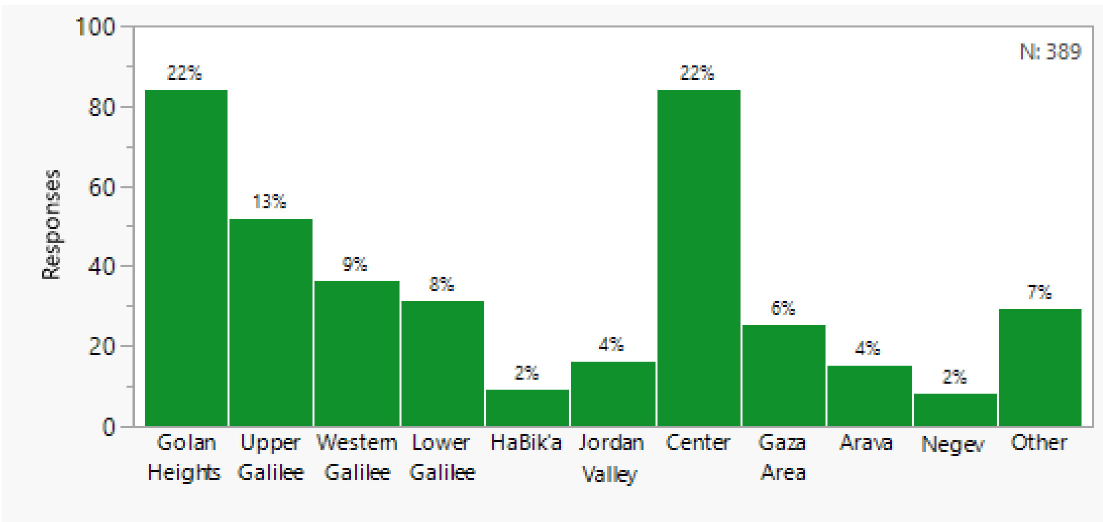

Figure 2: Distribution of respondents by agricultural produce

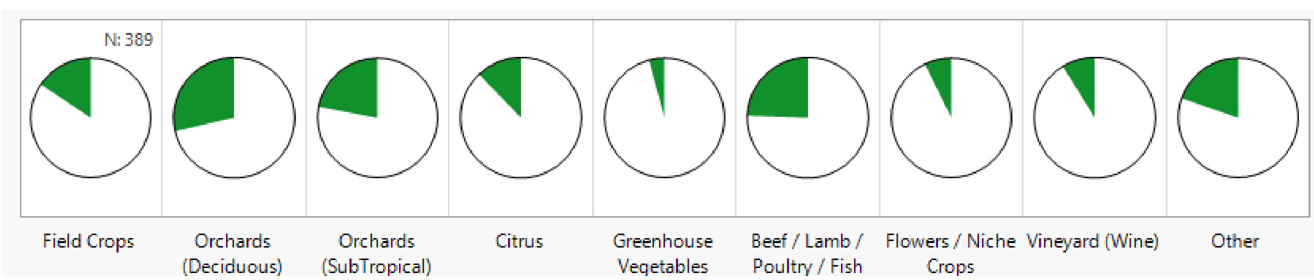

Figure 3 : Challenges that farmers have experienced. Farmers were asked to indicate which of the following challenges they have experienced since the war started.

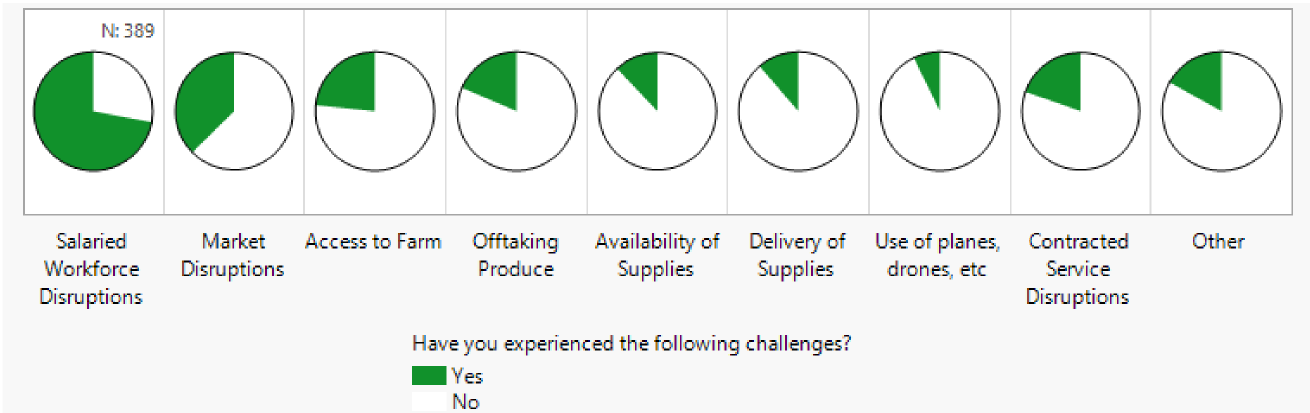

Figure 4: Estimate of damage experienced to farm operations since October 7th

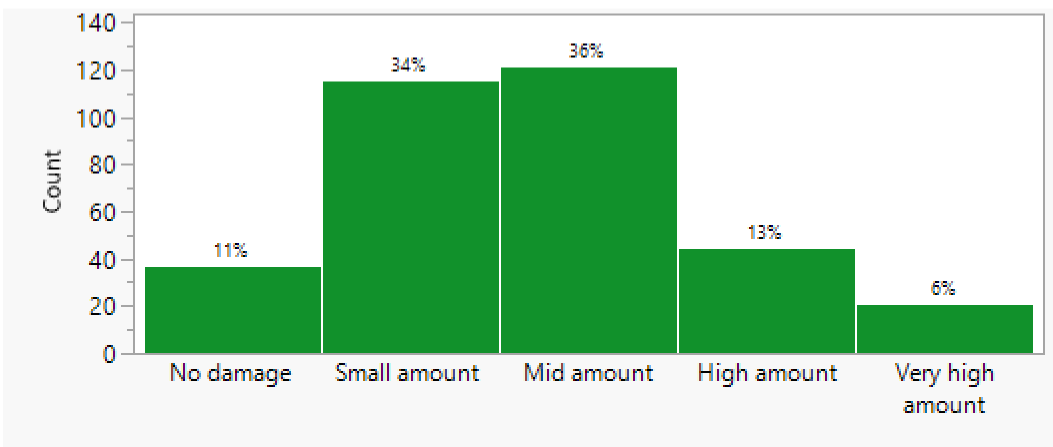

Figure 5: Expected damage to farm operations in the next 3 months. Farmers were asked to estimate the level of damage to their farm operations in the next 3 months caused by the war.

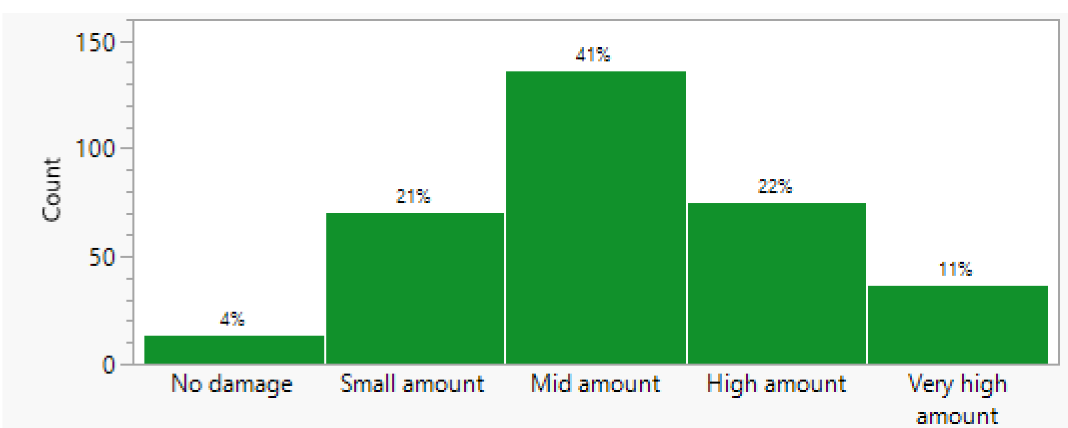

Figure 6: The most critical challenges stated by farmers. Farmers were asked to choose the single most critical challenge they are facing now.

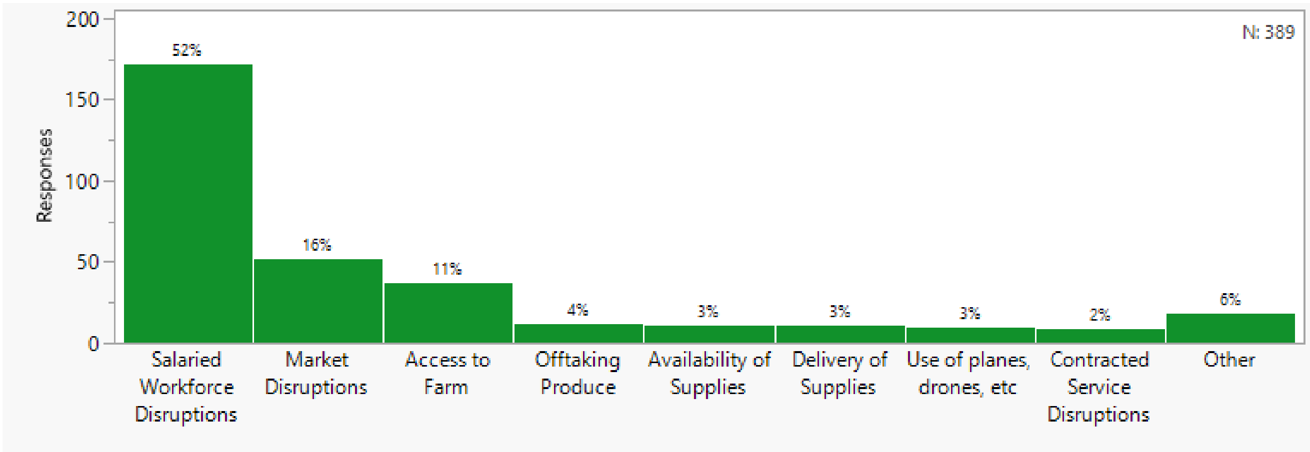

Figure 7: Estimated impact of the war on farm production. Farmers were asked to estimate their current expected agricultural production, as compared to their expectations before 7 October.

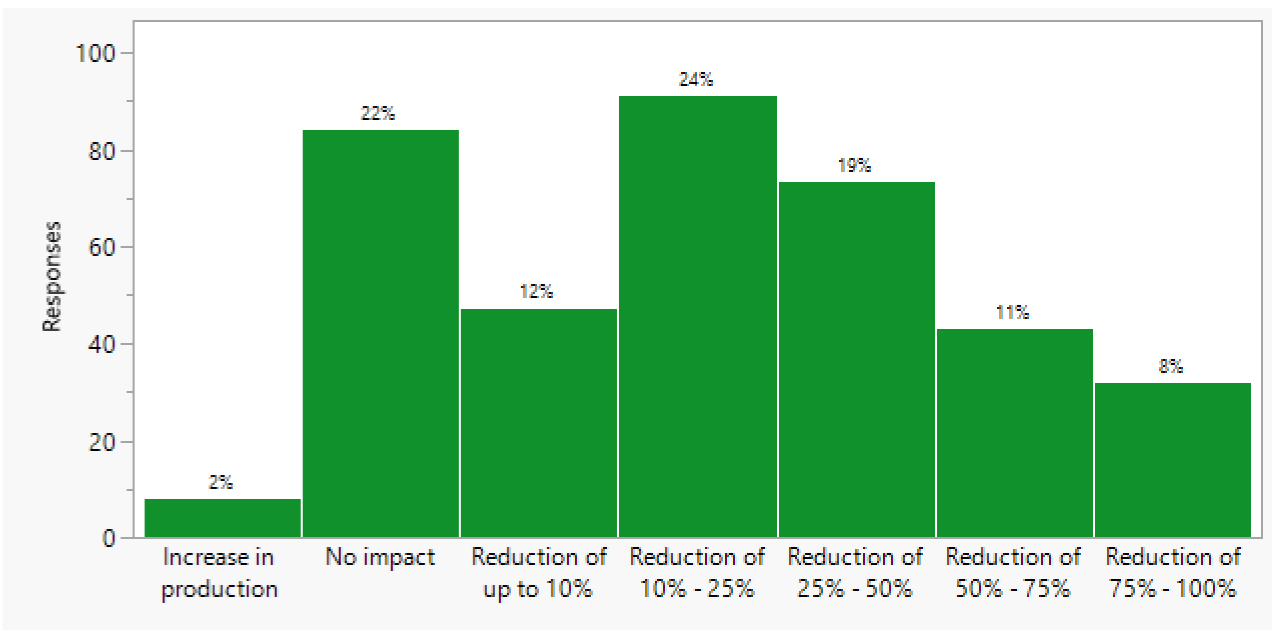

Figure 8: Estimated impact of the war on farm revenue. Farmers were asked to estimate their current expected farm revenue, as compared to their expectations before October 7th.

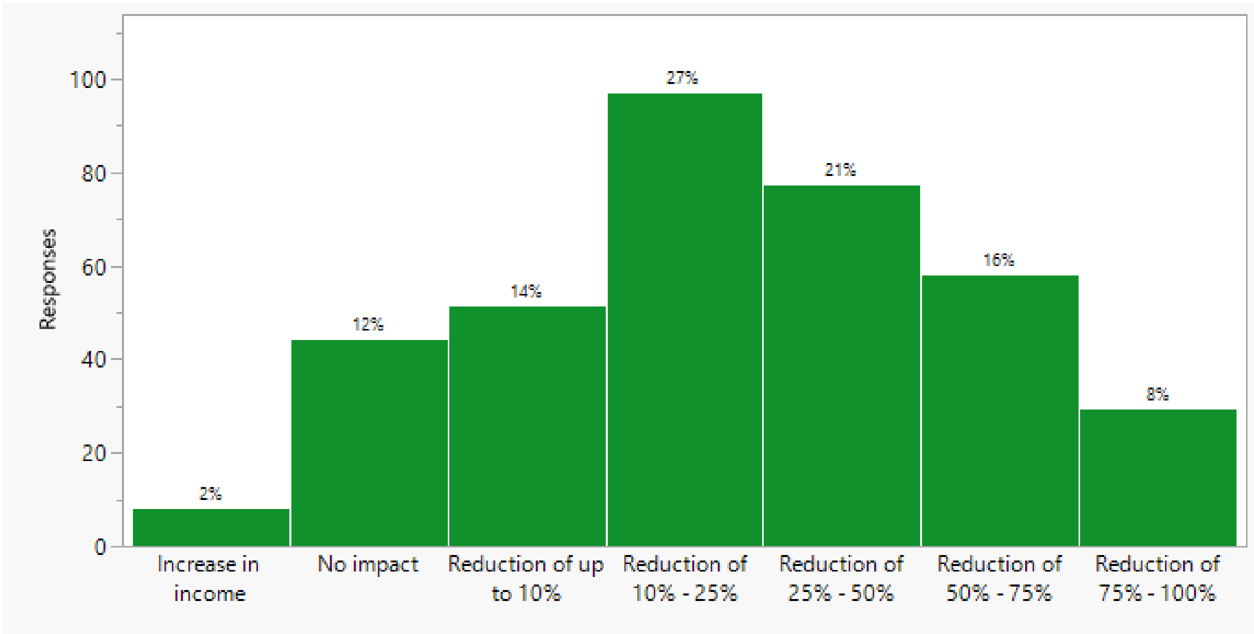

Figure 9: Estimated impact of the war on farm expenses. Farmers were asked to estimate their current expected farm expenses, as compared to their expectations before October 7th.