Key Issues

During the second quarter of 2017, conflict continued to impact food security in Syria through high market prices of basic food items and fuel, large displacements, constrained access to humanitarian assistance, lack of access to clean water and increased levels of malnutrition. The intensity of conflict (airstrikes, attacks and direct clashes) continued to be high, although the overall number of incidents has declined since the first quarter of the year and were mostly concentrated in five governorates namely Hama, Aleppo, Homs, Ar-Raqqa and Deir-ez-Zor. In June, an estimated 540,000 people were still trapped in 31 besieged locations in four governorates, including Damascus, Rural Damascus, Idlib and Deir-ez-Zor. As of 27 June, Ar-Raqqa city has also been besieged.

Over six million people remain internally displaced inside Syria1. In this reporting period, over 100,000 persons were displaced per month in April and May, although the number of displaced declined to 78,000 in June. Deterioration of security and economic conditions as well as lack of basic services in the places of origin were most frequently cited reasons for displacement. Most new displacements occurred from and within Aleppo, Idlib, Hama and Ar-Raqqa governorates. In June 2017, an estimated 63,000 people returned to their places of origin; Aleppo governorate received nearly half of the returnees. During the first six months of this year, over 440,000 IDPs have returned to their homes in Syria primarily for such reasons as looking for family members, checking on property, and, in some cases, improved security conditions2. However, major challenges facing returnees such as lack of livelihood opportunities, shortages of food and water, limited basic services and restricted humanitarian access are likely to restrict sustainable and large-scale returns3.

Between January and May 2017, the Whole of Syria (WoS) Food Security Sector (FSS) partners provided food assistance to over five million people and distributed bread and wheat flour to over two million people in different locations of Syria on a monthly basis. The FSS has also provided emergency food rations to a total of 1.5 million beneficiaries in the first five months of this year, while slightly over 165,000 households were reached with livelihood / agriculture assistance activities. In besieged parts of Deir-ez-Zor city humanitarian assistance to population in need was delivered through airdrops led by World Food Programme (WFP). However, for logistical reasons, implementation of airdrops was not possible in other besieged locations where an estimated 440,000 population remained.

According to the latest Crop and Food Security Assessment Mission (CFSAM) conducted by Food and Agriculture Organisation (FAO) and WFP4, cereal production has improved this year compared to a record-low production of last year. However, the total wheat production, estimated at 1.8 million tons, is still less than half of the pre-conflict (2002-2011) average of 4.1 million tons. Nearly 80% of the wheat was harvested in four governorates: Aleppo, Al-Hassakeh, Ar-Raqqa and Deir-ez-Zor. Completion of harvests has also improved availability of stubble grazing for livestock, although the price of fodder remained high.

Increased supplies of wheat following a relatively improved harvest is likely to result in a short-term decline of wheat market prices. However, the compounding effects of expected disruptions in market supplies owing to the ongoing conflict as well as forecasts of the overall shortage of wheat availability for 2017/18 marketing year (CFSAM uncovered a shortfall of 616,000 tons in wheat supply) is likely to exert an upward pressure on cereal prices in the following period. Since the beginning of the year, the national average price of wheat flour as well as diesel and bread have surged significantly and were considerably higher compared to the levels a year ago. Markets of Rural Damascus (Arbin and Nashabiyeh-besieged areas), Homs (Homs city) and Hama (Kafr Zeita) exhibited over three-fold increase in wheat flour prices during this period due to population displacement and restricted commercial movement in Hama owing to the escalated conflict in March.

Intensified conflict resulted in a drastic reduction of functional drinking water sources in Ar-Raqqa between April and June, although the situation has improved in Deir-ez-Zor since the previous quarter. Nevertheless, access to clean drinking water remains constrained in most governorates of the country, while the prevalence rates of water-borne diseases have more than doubled since the previous quarter.

The results of a screening of 379,395 children of under five years of age carried out in the second quarter of the year in health clinics across 13 governorates of the country indicated an increase in the caseload of malnutrition since the previous quarter. Twenty-seven percent of the

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3 Ibid

Acutely malnourished children were in the severe form. However, the results of screening data aggregated to governorate level didn’t indicate any deviation from the expected trend in caseload. In June 2017, the highest proportions of cases of acutely malnourished children at governorate level were found in Hama (5.8%), followed by Rural Damascus (4.7%) and Idleb (4.2%).

Early actions should be based on recovery of agriculture sector, including rehabilitation of damaged infrastructure and value chains in order to increase production levels and support livelihood recovery. Food assistance will be required to continue supporting Internally Displaced Persons (IDPs) along with livelihood support activities to facilitate return.

SECURITY SITUATION

Overall, between April and June, the Syrian Government forces and the Syrian Democratic Forces (SDF) were able to expand the territories under their control, while the Islamic State of Iraq and the Levant (ISIL) has been losing important strategic locations and have been completely encircled in Raqqah. The number of security incidents in Syria, which included airstrikes, direct clashes, attacks (including a chemical attack on Khan Shaykhun) and American air strikes on Syrian Government forces) and others, has decreased from 4,655 in the first quarter of the year to 2,943 in the second quarter (Figure 1).

Figure 1: Total of Security Incidents in Syria by Month (January–June 2017).

As a result of the continuing violence, large internal displacements have still taken place in the reporting period, although the numbers of new IDPs have slightly reduced in the second quarter compared to the first quarter of the year. According to Needs and Population Monitoring (NPM) data, the number of newly displaced has decreased from over 140,000 in April to nearly 78,000 in June. Over 80% of displacements in the second quarter occurred from within Aleppo (38%), Idleb (20%), Hama (14%) and Ar-Raqqah (11%).

According to the Office for the Coordination of Humanitarian Affairs (OCHA), as of June this year, 31 locations were besieged with an estimated total population of 540,000 people. This an increase by 46,000 people in besieged areas compared to the first quarter. Since the end of June, Ar-Raqqah town has also been besieged.
Agriculture

Crops

Cereal harvests were completed between May and June 2017. According to the 2017 CFSAM, production of wheat and barley in Syria is estimated at 1.8 and 0.8 million tons, respectively, which is a slight improvement compared to previous year. However, wheat production is still less than a half of the pre-conflict average of 4.1 million tons (2002-2011). High rainfall zones (Zones I and II) received highest cereal production (Map 1). Three governorates, including Aleppo, Al-Hassakeh and Ar-Raqqa account for the largest share in cereal production (70% for wheat and 82% for barley).

Although the total area planted with wheat in 2016/17 was slightly lower (1.17 million hectares) compared to 2015/16 season (1.19 hectares), the crop yields have improved due to better rainfall and better access to land in the context of improved security conditions. The total area planted with barley has increased from 1.07 to 1.11 million hectares (ha) between 2015/16 and 2016/17. Aleppo, Al-Hassakeh and Ar-Raqqa, account for over three-quarters of the total area planted under cereals such as wheat and barley. The wheat yields at governorate level averaged 2.57 tons/ha and 1.14 tons/ha for irrigated and rain-fed wheat respectively, while barley yields were estimated at 1.65 tons/ha and 0.96 tons/ha for irrigated and rain-fed barley respectively (Figure 3).

Figure 3: Average wheat yield, Syria, 2017
CFSAM also found an increase in area harvested with pulses and food legumes such as lentils, chickpeas, fava beans and peas between 2016 (182 000 ha) and 2017 (203 000 ha). In the second quarter, the major spring and summer crops that were planted included potatoes, tomatoes, cucumbers, eggplants and capsicum as well as cash crops. These crops are expected to be harvested from June through September.

Livestock

Livestock conditions between April and June sites were generally satisfactory with stubble grazing becoming more available due to the completion of harvesting. However, limited availability of pastures was reported in Idleb and Aleppo related to overconcentration of livestock, the costs of water trucking and grazing fees. The recent CFSAM estimated the 2016-2017 price increase for hay at 366%. For milk producers, the costs of buying hay and compound feed have become prohibitive almost outstripping their profits from milk sales. This is also documented by sharp increases in milk prices (+25% from 2016 to 2017)⁸, despite average rainfall levels in most locations over the same period.

No major livestock disease outbreaks were reported. However, widespread chronic rumen acidosis, especially in dairy cows, were reported from Idlib, Aleppo and northern Hama due to overfeeding with concentrates and too little roughage in rations. Prevalence of sheep mange, especially in Idlib, remains very high with 50% of flocks infected. Sheep mange illustrates current state of most livestock herds, which is characterized by permanently depressed productivity.

MARKET PRICE TRENDS

Ongoing price monitoring initiatives, including ones conducted by WFP and REACH Initiative, indicate a significant surge in national average prices of diesel, bread and wheat (114%, 95%, and 64%, respectively) in Syrian pound terms between March and May 2017. Similarly, significant gains in the prices of these commodities have been recorded from January (116%, 119% and 60%) and May 2016 (132%, 97% and 78% respectively). The trends and rates of price change were similar in U.S. dollar (USD) terms due to relatively stable exchange rates between SYP and USD⁹. The costs of sugar and rice have also shown moderate increase between March and May (15% and 13%, respectively) as well as year-on-year (14% and 25%, respectively). Prices of lentils have remained relatively stable or declined in most governorates in the same periods of comparison (Figure 4).

At sub-district level, prices in Syria show mixed trends. For example, prices of diesel have declined or remained relatively stable in 61 out of 161 markets of different sub-districts, while increasing in the remaining 100 markets. Sky-rocketing diesel prices, with an over 10-fold increase since March were seen in Tel-Abiadi (Ar-Raqqa) and Khan Arnaba (Quneitra) sub-districts due to conflict-related disruptions on major supply routes. Compared to a year ago, diesel prices were 10 to 30 times higher in Tel-Abiadi (Ar-Raqqa), Khan Arnaba (Quneitra), Al-Khashiniiyeh (Quneitra) and Tartous sub-districts. Wheat prices have shown over 200% increase between March and May and were higher than a year ago in Arbin and Nashabiyeh sub-districts of Rural Damascus as well as in Homs (Homs), Kafr Zeita (Hama) and Al Mayadin (Deir-ez-Zor) sub-districts. Sub-districts of Rural Damascus with besieged areas (Arbin, Nashabiyeh, Kafr Batna, Duma and Harasta) as well as Ziyyara (Hama) have also seen a significant surge (over 200%) in sugar prices in both periods of comparison.

Price dynamics in Syria differ significantly from international trends. For example, crude oil prices on international markets have shown a downward trend between March and May and continued to decline in June although they have increased year-on-year (14% since May 2016)⁹. The FAO Sugar Price Index also went down (11.2%) between March and May and continued dropping in June, reaching its lowest levels since March 2016. This trend is reflective of large export availability and weak import demand on international markets¹⁰. Between March and May 2017, the International Grain Council (IGC) wheat sub-index went down marginally (1%) although it gained month-on-month in June, reaching its highest level since July 2015 as a result of heightened concerns about dry weather. On the other hand, the IGC rice sub-index rose by 7% between March-May 2017 and continued its gaining streak through June, marking a 31-month high¹².

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⁹ The SYP has weakened against the USD by 5% since January, although the currency has appreciated modestly since a year ago (6%). Source: https://sp-today.com/en/currency/usd_dollar


proportional morbidity of WBD among children under five; these governorates exhibited particularly high rates in June (43% and 30% respectively). Other Acute Diarrhea (ODA) incidents accounted for the largest share, ranging from 69 to 100%, in WBD across governorates, which is consistent with the trends observed in the previous quarter. According to WHO, diarrheal disease is a leading cause of child mortality and morbidity in the world as well as a major cause of malnutrition.

According to EWARN bi-weekly monitoring data16 from over 1200 drinking water sources in 10 governorates (excluding Damascus, Tartous, Lattakia, As-Sweida) of Syria, proportions of functioning water sources during April-June 2017 ranged from 23% to 89%. The findings are similar to the monitoring results of January to March 2017 (23-91%). The governorates with the lowest percentages of functional drinking water sources in the reporting period included Quneitra, Rural Damascus, Hama and Ar-Raqqa. The monitoring results indicate significantly reduced access to functional drinking water sources in Ar-Raqqa - from 66% of functional water sources in March to 24% in June. Similar to the findings of the period January to March 2017, none of the monitored functional water sources in Hama governorate were treated over the reporting period, while the lowest percentages of treated functional water sources were found in Aleppo (9-14%), Rural Damascus (18-20%) and Al-Hassakeh (20-21%) governorates.

Nutrition and Health

From April to June 2017, a total of 379,395 children of under five years of age were screened in health facilities in 13 governorates of Syria13. A total of 6,709 of children were identified as suffering from acute malnutrition, an increase from 4,731 (out of 384,068 screened) of the previous quarter. Out of the total of acutely malnourished in the reporting period, 1,816 children were in a severe form. Based on screening data aggregated to the governorate level, the highest proportions of cases of acutely malnourished children were found in Hama (5.8%), Rural Damascus (4.7%) and Idleb (4.2%) in June 2017.

According to Early Warning Alert and Response Network (EWARN) April-June 2017 epidemiological surveillance data obtained from health facilities across 10 governorates of Syria14 on a weekly basis, waterborne diseases (WBD)15 were the second-most frequently reported diseases in the country, after influenza-like illnesses. Overall, prevalence rate of WBD in the country throughout the reporting period ranged from 8% to 16% temporally with higher rates observed among children under five, ranging from 11% to 21%. The data showed an increasing trend of WBD prevalence among the general population as well as among children under five from April to June, while the rates have more than doubled since the beginning of the year (Figure 5). As in the previous quarter, Al-Hassakeh and Deir-ez-Zor had the highest

13 Excludes Deir-ez-Zor for the entire period, while screening data for Ar-Raqqa is only for June
15 EWARN monitors and reports such waterborne diseases as acute bloody diarrhea (ABD); acute watery diarrhea (AWD); acute jaundice syndrome (AJS); other acute diarrhea (OAD); suspected typhoid fever (STF)

Figure 4: Syria Price Trends in SYP and USD

Figure 5: Trend in WBD Prevalence (January-June 2017)