

Reference Date: 20-May-2011

### FOOD SECURITY SNAPSHOT

- Early forecast points to a below average winter cereal output in 2011
- Lower cereal import estimated in the current 2010/11 (July/June)
- Food inflation declines since December 2010
- Concern grows over the impact of current social unrest on food prices and the overall food security situation of vulnerable groups

### Unfavourable prospects for 2011 winter crops

Harvesting of the 2011 winter cereal crops has just started and early estimates indicate a below average crop. The rainy season started 3-4 weeks late at the beginning of December and dry spells persisted during the first three months of 2011 in most areas. Abundant rainfall in April somehow benefited the grain filling stage of the crops. Based mainly on satellite imagery, a below average output is tentatively foreseen in the main wheat producing governorate of Al Hasakah in the north-east, while slightly better crop prospects are reported in Aleppo and Al Raqqah governorates.

Overall, the early forecast of the 2011 wheat and barley production is put at about 4 million tonnes, about 9 percent below last year.

### Lower cereal imports in 2010/11 compared to last year, but still above average

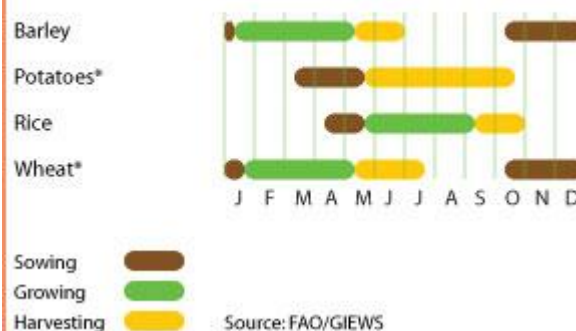
Cereal imports - mainly wheat for food use and maize and barley for feed – in the current and ending marketing year 2010/11 (July/June) are forecast at about 4.1 million tonnes. At this level, although still above average, imports are about 10 percent lower than in 2009/10 when the replenishment of stocks were paramount in order to offset the impact of the drought-affected 2008/09 winter season crops. Imports of rice are forecast at 330 000 tonnes, similar to the high levels of the previous two years, partly in response to the additional demand from over one million Iraqi refugees in the country.

### After double-digit levels in 2010, food inflation is declining

According to the Central Bureau of Statistics, annual consumer price inflation rose at 6.9 percent in 2010, compared to 3 percent in 2009. The main reason for this inflationary surge is a sharp increase in the food and beverage price index that rose by 16.3 percent during the second semester of 2010. In this period, prices of vegetables and legumes increased by almost 80 percent, substantially more than the normal seasonal increase of 35-45 percent.

Food price inflation reached its peak in December 2010 and in January 2011 was nearly twice (13 percent) compared to January 2010 (7 percent). Since then, however, prices have started to decline and in March 2011, the overall food price index declined by 3.7 percent. Main price reductions were registered for vegetables (declined by 8.7 percent) and meat (declined by 2.7 percent), while prices of bread and

### Syrian Arab Republic Crop calendar (\*major foodcrop)

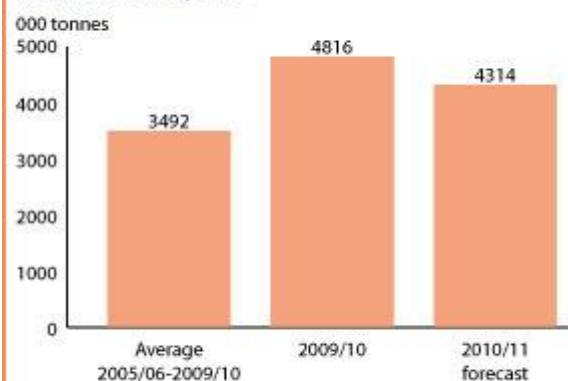


### Syrian Arab Republic Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	3 682	3 600	3 250	-10
Barley	769	750	700	-7
Maize	147	125	125	0
Others	5	4	4	0
<b>Total</b>	<b>4 604</b>	<b>4 479</b>	<b>4 079</b>	<b>-9</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Syrian Arab Republic Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

cereals remained quite stable.

## Grave concern for food security following recent political and social unrest

According to the Institute of International Finance (IIF), the economic toll from the current political and social unrest will affect economic growth this year with output in Syria forecast to dip by more than one percent. In addition, the possible impact of the unrest on food prices due to disruptions in distribution channels may lead to severe localized shortages of food in main markets.

Syria already hosts one of the largest urban refugee populations in the world, with nearly one million Iraqis. Most of these refugees have become ever more vulnerable as a consequence of the protracted nature of their displacement and the effects of the global economic crisis that has driven up food and fuel prices and reduced remittances. In addition, due to the continued political and security problems in Iraq, it is unlikely that these refugees would return to their home country any time soon. A revised Emergency Operation (EMOP) was jointly approved in May 2011 by FAO and WFP for assistance to up to 115 000 Iraqi refugees in Syria, worth USD 45.3 million for a period of 8 months (1 May to 31 December 2011).

