

GIEWS Country Brief

Syrian Arab Republic



Reference Date: 07-April-2015

FOOD SECURITY SNAPSHOT

- Despite overall favourable weather conditions, agricultural season is affected by ongoing conflict
- Prolonged conflict has severely impacted on country's food security situation especially for vulnerable groups
- Millions of people, both internally displaced and refugees in neighbouring countries require continued assistance

Favourable weather conditions for the 2015 cereal crop

Planting of 2015 winter wheat and barley crops, to be harvested from May 2015, was completed in January. Abundant moisture during the sowing stage was conducive to seed establishment but delayed soil preparation and planting was reported in some areas.

Cumulative precipitation in the provinces of Aleppo, Idlib, and Hama that were severely affected by drought in 2014, so far exceeded that of last year as well as the long-term average (1989-2012).

Cumulative precipitation in Hassakeh province (which normally accounts for over 35 percent of the Syrian Arab Republic's total area planted to wheat and barley) was similar to the long-term average.

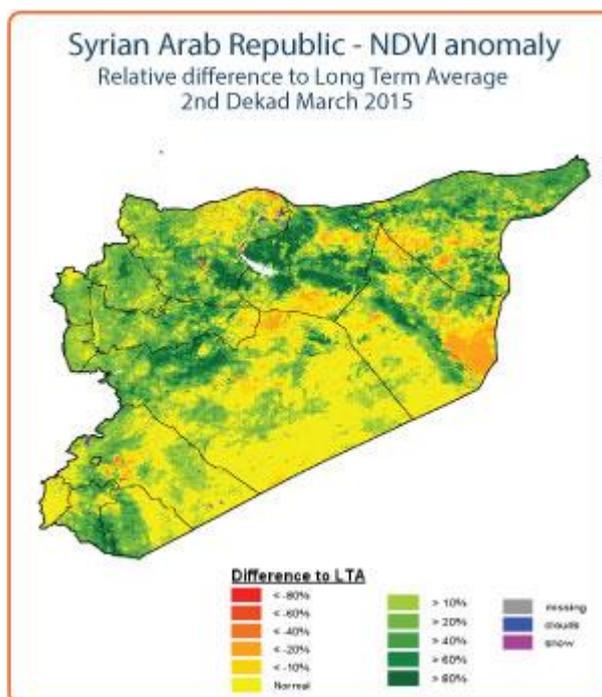
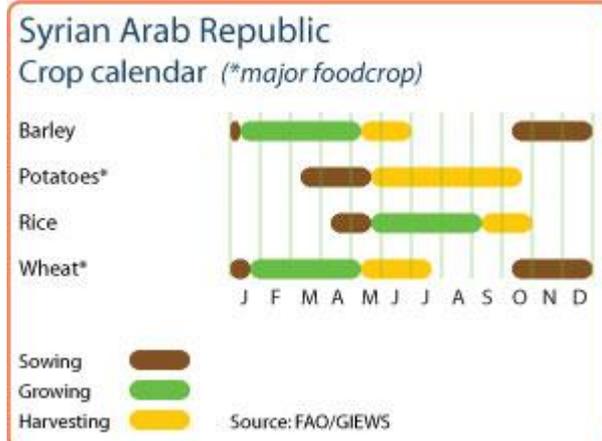
The vegetation response captured by the satellite-based Normalized Difference Vegetation Index (NDVI) suggests a good vegetation condition.

The ongoing conflict and lack of inputs (such as improved seeds, fertilizer and fuel), damage to agricultural machinery, irrigation systems and storage facilities together with disruptions in electricity supplies continue to seriously hamper agricultural production.

For the 2014/15 cropping season, Government subsidized seed distributions were made only to farmers who had paid back at least 5 percent of their previous debt. In addition, farmers opting for seeds from the General Organization for Seed Multiplication (GOSM) are obliged to settle 25 percent of the cost in advance while the remaining 75 percent is supported by the Agricultural Credit Bank until the harvest and are required to market their harvest via Government centres only. Reports indicate that GOSM distributed about 13 percent of the country's estimated requirements, at 60-70 percent of the cost price. Before the crisis, the Government used to distribute around 200 000 tonnes, about 80 percent of the country's requirements of seeds. The rest was supplied by farmers using their own seeds, particularly in rainfed areas.

The fertilizer factory (in Homs) remains operational but only at a fraction of its capacity.

Assuming continuing favourable climatic development, a recovery of cereal production is expected compared to the drought-stricken harvest of 2014. However, given the impact of conflict and lack of



Syrian Arab Republic
Cereal production

	2009-2013	2013	2014	change
	average		estimate	2014/2013
	000 tonnes		percent	
Wheat	3 177	2 400	1 865	-22
Barley	797	993	594	-40
Maize	134	80	156	95
Others	8	8	8	0
Total	4 116	3 481	2 623	-25

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

essential inputs production may only recover slightly.

Well below-average cereal production gathered in 2014 resulting in increased imports

The Syrian Ministry of Agriculture and Agrarian Reform (MAAR) estimated the 2014 wheat production at 1.865 million tonnes, over 20 percent less than in 2013 and the lowest level of wheat production for 25 years owing to drought and conflict.

Total Government purchases in 2014 reached slightly over 500 000 tonnes, about half of the amount purchased in 2013 and an average of 2.8 million tonnes prior to the conflict. There are indications that some production was sold cross-border to Iraq to take advantage of better prices.

The Syrian Arab Republic normally relies heavily on food imports amounting to almost half of the total domestic utilization. Overall, the cereal import requirement is expected to increase in the current 2014/15 marketing year (July/June) to 4.6 million tonnes compared to the previous year's 4.3 million tonnes. Of this, the wheat import requirement is tentatively forecast at about 2 million tonnes.

Price increases of subsidized items likely to increase inflation

In January 2015, the Government introduced price increases for subsidized items. Price of bread increased by 40 percent, with a package of slightly over 1 kg selling for SYP 35 (USD 0.16 as of late March 2015). Price of butane gas increased from SYP 1 100 to SYP 1 500, 1 litre of diesel for transportation purposes from SYP 85 to SYP 125 and for domestic use from SYP 85 to SYP 140.

Reports also indicate that in an effort to save on the bread subsidy programme, the Government changed the flour extraction rate of flour used in bread, introducing more bran. In an effort to mitigate increased prices, a new monthly allowance of SYP 4 000 (USD 18) was introduced for all recipients of state salaries and retirees.

Last official inflation information dates back to August 2014 when inflation fell to single digits. However, with the reduction in fuel and bread subsidies, localized shortages and the weakening currency are likely to put upward pressure on inflation resulting in further deterioration of purchasing power and food security situation of poor households.

Refugees registered in region total about 4 million

As of late March 2015, about 4 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. The WFP emergency food assistance to the people affected by unrest within the country is scaled to reach 4.5 million by December 2015, up from 4.25 million in 2014. WFP assistance in neighbouring countries is to reach more than 2.1 million beneficiaries by December 2015, down from 2.68 million in 2014 focusing on the most vulnerable groups. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain.

