Key Issues

In the first quarter of 2017, ongoing conflict continued to impact food security in Syria through higher market prices, reduced access to water and basic services, increased levels of malnutrition and large population displacements. The intensity of conflict (airstrikes, attacks, direct clashes) continued to be high, affecting nearly all governorates of the country. Thirty-three communities in five governorates of Syria, including Damascus, Rural Damascus, Homs, Idleb and Deir-ez-Zor remained besieged with over 600,000 people estimated in need of humanitarian assistance. Over 341,000 persons across Syria were forced to leave their homes, with 41% of displacements occurring in March. A combination of factors such as the deterioration of security, worsened economic conditions and lack of basic services as well as the search for better livelihood opportunities were among the most frequently reported reasons for displacements. Nearly half of the displaced population live in sub-optimal conditions such as camps, collective shelters and abandoned buildings. Since the start of the conflict, over six million people have been displaced internally in the country.

Besieged areas of Deir-ez-Zor and Rural Damascus were hotspots in the reporting period in terms of deteriorating food security conditions. High food and fuel prices continued to erode the purchasing power of the population, diminishing their ability to acquire food. Rural Damascus has seen price increases in all core food items (bread, rice, wheat flour, sugar, lentils), while the price of diesel has more than tripled within the first three months of the year. The price of bread has surged significantly in Deir-ez-Zor city while the costs of some other items were considerably higher compared to a year ago. In other governorates with besieged areas, prices of food items have declined between January and March. Escalating conflict in the first quarter of the year has also resulted in a reduction of functional drinking water sources in Deir-ez-Zor, where highest rates of water-borne diseases among children under five years of age were recorded. In Rural Damascus, the number of treated drinking water sources was amongst the least registered in different governorates of the country. Screening data for March 2017 from health clinics in Syria indicated high rates of malnourished children under five in Rural Damascus (10.4%).

National average market prices of core food items (bread, wheat flour, sugar, rice, lentils) and fuel (diesel) expressed in local currency remained high compared to last year, reflecting the impact of ongoing conflict, the continued decline of the Syrian pound (SYP) against the United States dollar (USD) and trends on international markets. Prices of most of these commodities have also shown annual increase in USD terms. However, the costs of food and fuel have mostly declined or changed marginally in the first three months of the year except for bread, which increased in value in the reporting period as a result of intermittent supplies of diesel that disrupted bakeries.

Forecast of Easing of Trade in Northeast Syria

In early March, government forces linked areas under their control with Kurdish-controlled areas near Manbij, potentially easing trade (especially for wheat and oil). Such trade opportunities will take effect in the coming months between northeastern areas of Syria and western government-controlled regions, avoiding passing through ISIS-controlled areas. Also, the supplies of manufactured products in the northeast may improve and moderate consumer prices. However, this trade prospect will clearly depend on the security situation and whether this new route will remain open in the coming months.

Winter cereal crops (wheat and barley), which are expected to be harvested between May and July, are likely to be affected by the overall below-than-normal rains during crop-growing season. Such productivity levels could be compounded by scarcity and the high costs of fertilizers, fuel and irrigation. This could further exacerbate the impact on cereal availability in the country with a national wheat requirement of 3.9 million tonnes. Agriculture has a large share in the country’s economy, although the total output of the sector has shrunk since the start of the conflict six years ago.

The most recent SMART nutrition surveys (2015/16) in Syria (11 out of 14 governorates) revealed acceptable levels of global acute malnutrition (GAM rates of 3%) in children under-five based on the World Health Organization (WHO) classification (GAM rate <5%). The results of a screening of 389,024 children under five years of age carried out between January and March in 12 governorates (excluding Deir-ez-Zor and Ar-Raqqah) didn’t indicate any deviation from the expected trend / caseload at governorate level. However, high rates of malnutrition (71-10.6%) among screened children were reported from some clinics of Aleppo, Dar’a, Hama, Idleb and Rural Damascus governorates.

1 Data from Needs and Population Monitoring implemented through The United Nations Office for the Coordination of Humanitarian Affairs (available at npm-syria.org)
2 Ibid
4 Source: Whole of Syria Nutrition Cluster
6 Source: Whole of Syria Nutrition Cluster
Security Situation and Population Movement

During the first quarter of 2017, the intensity of conflict remained high in Syria, although the total number of security incidents decreased since the last quarter of the previous year (Figure 1). However, the number of airstrikes increased with over 1,600 reported across all governorates except for Sweida and Tartous between January and March.7 Shelling and bombardments of farms/farmlands have also been reported (15 incidents). Largest concentration of incidents between January and March 2017 were recorded in the urban centres of Aleppo, Idleb, Hama and Deir Ez-Zor (Map 1). As in the last quarter of 2016, Aleppo was the most affected governorate with over 1,000 recorded incidents in the January-March 2017 period (Figure 2).

As a result of the continuing violence, significant displacement occurred during the reporting period although the numbers of displaced people were fewer (by 3,100 people) compared to the last quarter of 2016. According to Needs and Population Monitoring (NPM) data, more than 341,000 persons across Syria have been forced to leave their homes, with higher rates of monthly displacements observed in March. Similar to the trends observed from October to December 2016, the largest population movements (65% of cases) occurred in Aleppo governorate, although most displacement took place within Aleppo, with Jebel

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7 Source: iMMAP, Iraq Country Office
Saman district accounting for more than half of the displaced people (Figure 3). In other governorates, around 40% of the cases of displacement took place within the same governorates. Notably, in Damascus, the vast majority of the displaced (93%) moved to the neighboring Rural Damascus.

Urban centres, especially Aleppo, as well as areas close to the border with Turkey have received particularly large numbers of displaced people (Map 2). A majority of the people displaced to locations in Aleppo were from within the governorate, while some (5%) originated from Hama, Idleb and Ar-Raqq governorates.

Figure 3: IDP Movement (January-March 2017)

IDP Movements

<table>
<thead>
<tr>
<th>Governorate</th>
<th>January</th>
<th>February</th>
<th>March</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aleppo</td>
<td></td>
<td></td>
<td>223,000</td>
</tr>
<tr>
<td>Idleb</td>
<td>23,837</td>
<td></td>
<td></td>
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<tr>
<td>Damascus</td>
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<td></td>
</tr>
<tr>
<td>Homs</td>
<td>16,315</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rural Damascus</td>
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</tr>
<tr>
<td>Deir-ez-Zor</td>
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<td></td>
</tr>
<tr>
<td>Ar-Raqqa</td>
<td>6,788</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Al-Hasakah</td>
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</tr>
<tr>
<td>Hama</td>
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<tr>
<td>Tartous</td>
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<tr>
<td>Lattakia</td>
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<tr>
<td>Deir-ez-Zor</td>
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</tr>
<tr>
<td>Quneitra</td>
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<tr>
<td>As-Sweida</td>
<td>205</td>
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</tr>
</tbody>
</table>

Map 2: IDP Arrivals (January-March 2017)

Agriculture

The planting of rain-fed cereal and winter vegetables was completed in January. The main crops planted across Syria during this winter cropping season included wheat, barley, beans, lentils, chickpeas, spices (black cumin, anise, nigella sativa, coriander) and vegetables (cucumber, onion, peas, lettuce). Harvesting of cereals is expected between May and July, while the majority of vegetables will be harvested from April to June. Planting of the spring/summer vegetables began in February.

Precipitation during the winter crop growing season was generally below average, particularly in January to February 2017. Rainfall totals were below the long-term average (LTA) of 2001-2016 across much of Syria with the exception of Homs, Rural Damascus and Deir-ez-Zor governorates, where rainfall amounts were close to the LTA. However, rainfall performance improved in March and most parts of the country, receiving average to above average rains with the exception of parts of Idleb, Lattakia, Tartous, Hama, Quneitra and...
Dar’a governorates, where monthly rainfall amounts were below average. Higher rainfalls were reflected in the Agricultural Stress Index (ASI), which depicted some improvements in the quality of vegetation from the third dekad of March (Map 3). Despite the moisture stress experienced in the first quarter of the year, field observations indicated healthy crop development in most parts of Syria, especially in Quneitra, Dar’a, Tartous, Idleb, Hama and Lattakia. In Al-Hassakeh, vegetation that was affected by moisture stress in January to February due to lack of rainfall also showed signs of improvements from the third dekad of March.

Map 3: Agricultural Stress Index (3rd dekad of March 2017)

Based on field reports, the main production challenges affecting farmers during this crop growing season included a shortage of insecticides and fungicides, high costs of irrigation (especially in March), lack of access to fertilizers due to high prices and the difficulty of securing quality crop seeds. Due to drastic decline in local production, fertilizers currently available in the country are mostly imported. The price of 50kg bags of fertilizers such as urea and phosphorous averaged SYP 9 000 (USD16) and SYP 6 000 (USD10) respectively. The cost of irrigation varied by governorate and crops. For example, the cost of irrigation per hectare of wheat ranged between USD150 and USD350 in different governorates, depending on the cost of diesel and the depth of groundwater abstraction. Field reports (March 2017) indicated pest (voles, sunn pest eurygaster integriceps and leaf hoppers) outbreaks in Idleb, Hama and Aleppo. While pest outbreaks were under control in most locations, damage from leafhoppers is likely to cause significant reduction in yields in parts of Idleb.

Although rainfall levels from January to March 2017 were generally below average, precipitation levels were higher compared to the same period last year. This has resulted in improved pasture quantity per unit land area as well as quality in comparison to the same period last year, when poor rainfall performance degraded the pasture quality that led to increased cost of fodder. However, pasture recovery has been slow due to high livestock densities in localised areas, which has resulted from restricted access to traditional grazing areas due to insecurity; this has continued to put an upward pressure on the cost of fodder. Field reports indicate that farmers increased selling of animals as they were unable to cover the costs of feed for their livestock and provide veterinary drugs to their animals.

There were reports of various ecto and endo parasites affecting cattle, sheep and goats in the northern governorates of Syria. Early signs of cattle emaciation were reported in Idleb, while various types of diseases affecting sheep and goats (clostridial enterotoxaemia, sheep pox and pasteurellosis) were reported in Eastern Ghouta, Rural Damascus. The shortage of vaccines and their high costs that left livestock without vaccination was the primary reason for this trend. Widespread malnutrition of livestock, due to non-availability of pastures and very limited availability of compound animal feeds have further exacerbated the impact of these infections.

Market Prices

Market dynamics in Syria are still very dependent on the security situation, the state of trade routes and infrastructures, as well as the availability and price of diesel. Affordability seems to remain the biggest issue.
respectively) and diesel (2.10 USD and 2.70 USD respectively), while wheat flour prices were among the highest recorded in markets monitored (0.60 and 0.69 USD respectively), next to Deir-ez-Zor city (0.80 USD).

Trends in the prices of the above-mentioned commodities on international markets were comparable with the price trends in Syria, when expressed in USD terms. For example, the FAO Sugar Price Index declined by 11% from January to March 2017, reaching its lowest level since May 2016; however, the index rose by 17% compared to a year ago (March 2016). In March 2017, the International Grain Council (IGC) wheat sub-index and rice sub-index monthly averages were at par with their values in January 2017. Compared to a year ago, wheat sub-index gained marginally by 1%, while rice sub-index was down by 7%. The crude oil prices have dropped by 4% since the beginning of the year; however, oil prices had gained significantly since a year ago (45%).

Volatility in prices of the above-mentioned commodities were analysed in the first quarter of 2017 at the governorate and national levels. At the national level, price volatility of the core food items (wheat flour, bread, rice, lentils and sugar) and diesel have generally declined in January-March 2017 (22% and 36% respectively) when compared to October-December 2016 (32% and 59%) and the same quarter of last year (44% and 61%) [Figure 5].

In contrast to quarterly trends, annual comparison indicates price increases in Syrian pound terms in all of the above-mentioned items since March 2016. The biggest year-on-year price increase at national level was recorded for diesel (29%), lentils (27%) and sugar (26%). Similarly, these commodities have also shown relatively higher rates of price increase in USD terms (10-12%) compared to other commodities. The cost of wheat flour rose markedly (18%) in SYP while the price of rice gained marginally (3%). In USD terms, the price trends indicated a marginal increase of 3% for wheat flour and 11% decline for rice. Generally, higher rates of price increase in SYP compared to USD could partly be attributed to a depreciation (15%) of the value of SYP against the USD (Figure 4).

Between January and March 2017, almost three-fold price increases were recorded in Duma (Rural Damascus) and Al Mayadin (Deir-ez-Zor) markets for diesel and bread respectively. In Rural Damascus and Duma districts, prices of most of the above-mentioned monitored commodities have also soared in the first quarter of the year. The same districts had the highest prices in March 2017 for bread (0.69 and 0.73 USD respectively) and diesel (2.10 USD and 2.70 USD respectively), while wheat flour prices were among the highest recorded in markets monitored (0.60 and 0.69 USD respectively), next to Deir-ez-Zor city (0.80 USD).

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In the January to March 2017 period, the highest volatility in food prices was recorded in Deir-ez-Zor (50%), followed by Hama (33%), Al-Hassakeh (32%) and Homs (28%) governorates; diesel prices were also most volatile in Deir-ez-Zor, followed by Ar-Raqqa, Rural Damascus and Al-Hassakeh. Generally, the price of diesel is more volatile compared to prices of food commodities. Bread exhibited greater volatility compared to other food commodities in most governorates. Such volatility could be attributed to the possible disruptions in the functionality of bakeries affected by shortages of diesel that were reported from many markets across the country in March, especially in active conflict-affected or besieged areas.
Nutrition and Health

The most recent SMART nutrition surveys conducted in Syria (11 out of 14 governorates) in 2015/16, indicated acceptable levels of GAM (3%) and chronic malnutrition (12.7%) among children under-five based on the WHO classification (<5% and <20% respectively).

In January-March 2017, a total of 389,024 children of under five years of age were screened in health facilities in 12 governorates of Syria.11 Of the total 4,767 children identified to suffer from acute malnutrition, 1,188 were in the severe form – nine times more risk of death compared to well-nourished children. The results of screening data aggregated to governorate level didn’t indicate any deviation from the expected trend/caseload. However, screening results for March detect higher proportions of cases of malnutrition (7.1-10.6%) in districts of Aleppo (As-Safira), Hama (As-Salamiyeh), Rural Damascus, Idleb (Harim and Idleb districts) and Dar’a (Dar’a and Izra districts) governorates compared to the rest of the country; however, this finding is not conclusive due to the different screening methodology across the country.

According to the Early Warning Alert and Response Network (EWARN) epidemiological surveillance data obtained from health facilities across 11 governorates of Syria conducted on a weekly basis, waterborne diseases (WBD)12 were amongst the highest syndromes reported in the country, next to influenza-like illnesses. The largest numbers of WBD cases among children under five were recorded in four governorates, including Deir-ez-Zor, Idleb, Aleppo and Al-Hassakeh, while the lowest rates were registered in Damascus city. Diarrhea represents one of the causes of malnutrition and may prevent catch-up growth among children. Out of all types of WBD diseases present among children under five in the reporting period, other acute diarrhea (ODA) accounted for 88-90% of the cases.

The EWARN data that monitored over 1000 drinking water sources in 10 governorates (excluding Damascus, Tartous, Lattakia, As-Sweida) indicated that around one-third were not functioning in the first quarter of 2017. The lowest percentages of functional drinking water sources (23-33%) were found in Quneitra, followed by Rural Damascus and Hama governorates. Notably, functional water sources have drastically declined since the beginning of the year in conflict-affected Deir-ez-Zor governorate (from 89% in January to 46% in March 2017). EWARN data also indicated that only 36-40% of functional water sources were treated to remove disease-causing agents. None of the monitored functional water sources in Hama governorate were treated over the reporting period; low percentage of treated functional water sources were also found in Aleppo (10%), Rural Damascus (19%) and Al-Hassakeh (21%) governorates.

11 Excludes Deir-ez-Zor and Ar-Raqqa
12 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)