GIEWS Country Brief
The Syrian Arab Republic

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FOOD SECURITY SNAPSHOT
- Favourable weather conditions on west, but dry conditions affected main eastern cereal producing areas
- High costs of inputs hinder agricultural activities
- Cereal harvest in 2021 likely to be below average
- About 12.4 million food insecure in 2020, as economic challenges and rapid currency depreciation decrease purchasing power

Erratic rainfall and abnormal temperatures affected main eastern cereal producing areas
Sowing of the 2021 wheat crop, for harvest from mid-June, was completed last December. Barley is harvested from May. Across the country, the first substantial rainfall of the season was recorded with a delay in November. Subsequently, well-distributed average to above-average precipitation amounts benefited crop development in the western part of the country. In the eastern governorates, including Hasakeh as well as parts of Raqqa, Aleppo and Deir-zor, which cumulatively provide about 80 percent of the annual wheat and barley production, rainfall has been irregular and vast swatches of land have been affected by drought. While in Aleppo the drought is limited to Ain al-Arab District and only about 5 percent of the total winter cereal production comes from Deir-zor, the entire area of Hasakeh, the governorate with the largest planted area, is concerned.

As of mid-April, above-average temperatures exacerbated the impact of the moisture deficit on winter cereal crops that were at crucial reproductive stages. Crop production is forecast at below-average levels as vegetation conditions of crops in April are very similar to those in 2017/18 when crops were severely affected by dry weather conditions.

High costs of inputs hinder agricultural activities
Rehabilitation of irrigation infrastructure, destroyed in a decade-long conflict, is proceeding. Between 2015 and 2019, on average, about 25 percent of the wheat in Hasakeh, 40 percent in Aleppo, 70 percent in Raqqa and the entire planted area in Deir-zor was cultivated using irrigation. Barley is almost exclusively rainfed. In the current season, the high cost of fuel and its widespread shortage have constrained the use of

Syrian Arab Republic

Cereal Production

<table>
<thead>
<tr>
<th>Crop</th>
<th>2015-2019 average</th>
<th>2019 estimate</th>
<th>change 2020/2019 percent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>000 tonnes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wheat</td>
<td>1 843</td>
<td>2 176</td>
<td>2 800</td>
</tr>
<tr>
<td>Barley</td>
<td>971</td>
<td>2 000</td>
<td>2 254</td>
</tr>
<tr>
<td>Maize</td>
<td>131</td>
<td>121</td>
<td>150</td>
</tr>
<tr>
<td>Others</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Total</td>
<td>2 951</td>
<td>4 303</td>
<td>5 210</td>
</tr>
</tbody>
</table>

Notes: percentage change calculated from unrounded data.
irrigation, especially during the crucial development stages for the wheat crop in the spring. Although farmers are eligible to buy diesel at the subsidized price of SYP 180/litre, they often rely on the open market due to general shortages. In February 2021 (before the current shortage), the price of 1 litre of diesel on the black market ranged from SYP 150 in Hasakeh to SYP 1 500 in Dara’a.

Fuel shortages have adversely affected also other mechanized operations during the current season and are likely to constrain opportunities to use machinery for the harvest from May. Increases in transportation costs hamper marketing activities. High production costs may also induce farmers to not harvest the entire area planted with cereals and lease out the fields for grazing, usually by sheep and goats, whose owners remain under pressure from high feed prices. Leasing out the fields is likely, particularly in the rainfed areas where expected yields are lower.

The continuing currency depreciation has further increased the already high production costs and hampered the access of farmers to agricultural inputs, which are mostly imported. Access to credit in the country is negligible. As the current supply capacity of the General Organization for Seed Multiplication (GOSM) covers only 20 percent of the total wheat seed demand, most farmers used their own seeds saved from the previous harvest or had to purchase them on the markets at a price higher than the subsidized price of SYP 450/kg guaranteed by the GOSM. Similarly, the Agriculture Bank provided granular nitrate fertilizer at the subsidized price of about SYP 200/kg (while the average market price in February was SYP 1 500/kg), with a substantial increase compared to SYP 108/kg last year and phosphate at SYP 240/kg (compared to SYP 1175/kg on the market), compared to SYP 175/kg last year. Overall, the quantities provided at subsidized prices are insufficient to cover the national needs. Crop protection material, although often of unknown origin and efficacy, is available on the market, but it is not accessible for many farmers and it leads to insufficient application rates.

As of April 2021, desert locust was reported in nine governorates, including Homs, Aleppo, Deir-zor, Raqqa, Damascus and other southern governorates. Although the locusts were present in separate and limited swarms, their spread was greatest in the southern part of the country. Close monitoring will be required in the month of May when egg laying is expected to take place, particularly in the margins of the fields.

In March 2021, the Government announced a local purchasing price for the 2021 wheat at SYP 900/kg (using the official exchange rate as of mid-April 2021, equivalent to USD 350/tonne), almost double the 2020 purchasing price (SYP 425/kg). Despite the increased price, it is likely that quantities purchased by the Government from farmers are likely to be non-sufficient as non-governmental entities in the past offered purchasing prices denominated in US dollars.

**Economic challenges increase food insecurity**

Battered by ten years of conflict, intensified by spill-over effects from the financial crisis in Lebanon which used to act as a financial intermediary, the national economy continues to weaken. On 15 April 2021, the Central Bank of the Syrian Arab Republic set the official exchange rate of USD 1 at SYP 2 512, after it was fixed at SYP 1 256 in June 2020. On the parallel
market, in mid-March 2021, USD 1 was traded for SYP 4,700, before strengthening to SYP 3,100 in mid-April 2021 following strict capital controls and restrictions on the movement of cash. For reference, before the onset of the conflict in March 2011, USD 1 was traded for SYP 47.

The rapid devaluation, particularly following capital controls in Lebanon after October 2019, brought much industrial production to a stand-still, as industrialists were unable to purchase inputs, with a consequent increase in unemployment rates. The purchasing power of salaries in the public sector, paid in Syrian pounds and not adjusted for inflation, deteriorated rapidly. The last financial grant topping up salaries of civilians and military personnel in State departments to compensate for increased cost of living was made in March 2021 in the amount of SYP 50,000 (corresponding to about USD 20 at the official exchange rate).

There are severe shortages of essential items, including bread at subsidized prices, medicines and fuel. Subsidized bread is rationed through a smart card system. In late October 2020, the Ministry of Internal Trade and Consumer Protection doubled the price of a subsidized pack of bread to SYP 100, while reducing the weight of each pack from about 1.3 to 1 kg and imposing limits on the number of packs to be purchased by each family. (Subsidized bread remains four times less expensive than that available in the free market).

As of 2020, the World Food Programme (WFP) estimated that about 12.4 million people (60 percent of the overall population) were food insecure, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and the rapidly worsening economy. As of March 2021, about 6.7 million Syrians were internally displaced and 5.6 million were registered as refugees outside of the country. In addition, a large number of Syrians are thought to be living abroad without refugee registration. The measures introduced to contain the spread of the COVID-19 pandemic constrained livelihood opportunities for casual labour in many countries across the region, affecting the food security conditions of Syrian refugees living abroad.

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