



GIEWS Country Brief

The Syrian Arab Republic

Reference Date: 18-August-2025

FOOD SECURITY SNAPSHOT

- Drought conditions and domestic unrest significantly affected cereal production in 2025
- High wheat import requirements forecast for 2025/26 amid sharp decline in local production and economic instability
- Domestic unrest, rising living cost and weak purchasing power worsen food insecurity in 2025

Drought conditions and domestic unrest significantly affected cereal production in 2025

Cereal harvest was concluded in July 2025 and production is estimated at 1.2 million tonnes, more than 60 percent below the average, largely due to severe drought conditions and high temperatures. Cumulative rainfall amounts between November 2024 and May 2025 were more than 50 percent below the average, the lowest level recorded during the last ten years. According to remote sensing geospatial data, the Vegetation Health Index (VHI) in May 2025 indicated vegetation conditions well below average in key producing regions of Aleppo, Raqqa and Hassakeh. In addition, domestic unrest during the planting period, between November and December 2024, which hampered farmers' access to fields, and high production costs, including fuel, seeds and fertilizers, contributed to a reduction in the area planted.

High wheat import requirements forecast for 2025/26 amid economic instability

Wheat import requirements for the 2025/26 marketing year (July/June) are preliminary forecast at 3 million tonnes, about 70 percent above the five-year average, reflecting two consecutive years of below-average output. While international financial restrictions were partially eased in May 2025, economic uncertainty, local currency fluctuations and domestic unrest raise challenges to securing foreign currency reserves required to buy key cereal commodities on international markets.

Domestic unrest, rising living cost and weak purchasing power worsen food insecurity in 2025

Food security has worsened since late 2024, due to domestic unrest, population displacements, local currency fluctuations,

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Crop Calendar (*major foodcrop)



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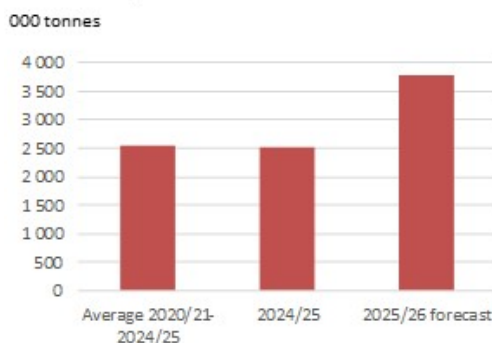
Cereal Production

	2020-2024	2024	2025	change
	average		forecast	2025/2024
	000 tonnes			percent
Wheat	2 116	1 930	900	-53.4
Barley	1 001	1 100	100	-90.9
Maize	397	350	242	-30.9
Others	6	6	6	0.0
Total	3 520	3 386	1 248	-63.1

Note: Percentage change calculated from unrounded data.

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Cereals Imports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

liquidity and cash availability issues, low availability of agricultural outputs, low crop productivity resulting in a decrease of income generated and affecting accessibility to food, limited livelihood opportunities and a sharp rise in the cost of living. According to Food Security Cluster, about 9.1 million people were projected to be acutely food insecure in 2024, including 5.4 million people at risk of hunger.

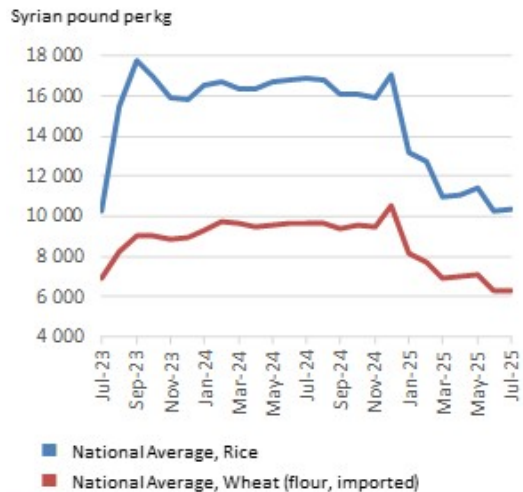
The Minimum Expenditure Basket (MEB), measuring cost of living, reached SYP 2.2 million in May 2025 before improving to 2 million in June. In comparison, the minimum wage increased from about SYP 280 000 in May to SYP 750 000/month in July following a 200 percent salary increase introduced by the Syrian Transition Government. Following the increase, the monthly wage would now cover about 37 percent of the food component in the MEB, underpinning households' persistent low purchasing power. National average prices of wheat flour and rice increased moderately month-on-month in July 2025, but remained about 35 and 40 percent, respectively, lower than in the same month in 2024. The year-on-year significant decline was mainly driven by easing import restrictions, increasing food supply and removal of military checkpoints across the country, which reduced transportation costs.

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This brief was prepared using the following data/tools:
 FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.
 FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.
 FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.
 Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.

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Retail prices of wheat flour and rice





GIIEWS Country Brief The Syrian Arab Republic

Reference Date: 04-April-2025

FOOD SECURITY SNAPSHOT

- Dry weather conditions and security concerns hamper cereal production in 2025
- Cereal production in 2024 estimated below average
- Economic instability raises uncertainty for cereal import requirements in 2025
- Food insecurity expected to persist in 2025 despite decline in food prices

Dry weather conditions and security concerns hamper cereal production in 2025

Winter cereal planting of 2025 was delayed due to late rainfall in November 2024 and was severely disrupted by ongoing conflicts, population displacements, the government's transition in late 2024 and early season drought between November 2024 and January 2025. With harvesting expected to begin in June 2025, limited access to fields and low rainfall amounts are anticipated to reduce both planted area and yield prospects, pointing to a below-average cereal production forecast in 2025. Furthermore, high input costs, including fuel and fertilizers, have discouraged farmers from growing cereals, prompting a shift to more profitable crops, including anise, cumin, black seed and coriander.

Cereal production in 2024 estimated below average

Cereal production in 2024 is estimated at 3.4 million tonnes, about 13 percent below the five-year average and about 33 percent below the pre-crisis average, mainly due to poor rainfall distribution throughout the season, high temperatures during the growing period in April and May 2024, outbreaks of diseases and high prices of essential inputs.

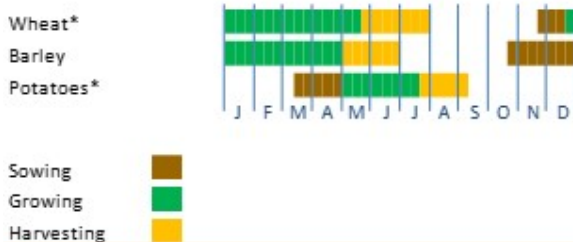
Economic instability raises uncertainty for cereal import requirements in 2025

Wheat import requirements for the 2024/25 marketing year (July/June) are tentatively forecast slightly above the five-year average, considering the low 2024 wheat production. However, economic uncertainty, national currency fluctuations and internal unrest, raise challenges for the country to secure wheat imports in 2025.

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(*major foodcrop)



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Cereal Production

	2019-2023	2023	2024	change
	average		estimate	2024/2023
	000 tonnes			percent
Wheat	2 347	2 300	1 930	-16.1
Barley	1 181	1 226	1 100	-10.3
Maize	370	563	350	-37.8
Others	6	6	6	0.0
Total	3 904	4 095	3 386	-17.3

Note: Percentage change calculated from unrounded data.

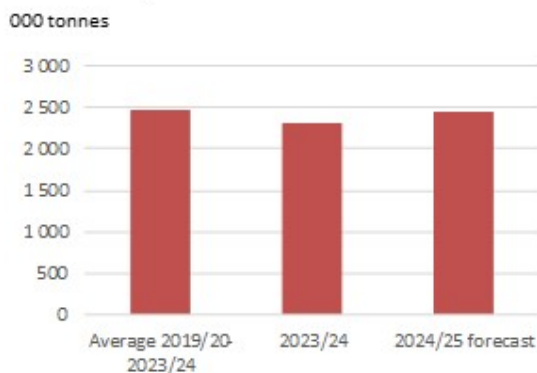
Food insecurity expected to persist in 2025 despite decline in food prices

In 2025, more than half of the population is estimated to be food insecure, including 9.1 million people being acutely food insecure.

In January 2025, the national average monthly Minimum Expenditure Basket (MEB) for a family of five was around SYP 2.5 million, a decline of nearly 15 percent from the previous month, marking the lowest rate in one year. The minimum wage of about SYP 280 000/month covers only about 18 percent of the MEB's food component, severely weakening households' purchasing power and food security. The slight decrease in food prices was driven by a drop in the local exchange rate in the parallel market, eased import restrictions that increased food supply and the removal of military checkpoints on key routes, which facilitated a faster flow of goods and helped reduce transport costs.

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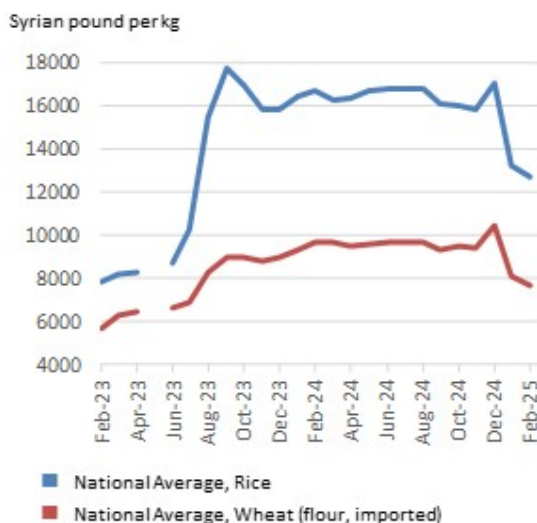
Cereals Imports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

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Retail prices of wheat flour and rice



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Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief

The Syrian Arab Republic

Reference Date: 01-November-2024

FOOD SECURITY SNAPSHOT

- Cereal harvest for 2024 estimated at below-average level
- Weak currency rate and economic instability put upward pressure on import costs and domestic prices
- Food insecurity conditions expected to deteriorate in 2024

Cereal harvest for 2024 estimated at below-average level

The harvest of winter crops particularly wheat and barley was completed in August 2024, with an expected output of 3.4 million tonnes, about 13 percent below the average. Despite adequate rainfall amounts during the rainy season, yields have been affected by poor temporal rainfall distribution throughout the season, high temperatures in April and May, spread of diseases due to unfavourable climatic conditions and limited access to farming input due to their high prices.

Wheat production in 2024 is estimated at 2 million tonnes, about 47 percent below the pre-crisis average and 16 percent below last year's level. At the end of 2023, fertilizer prices for the 2023/24 season announced by the government were about three times higher compared to those of the previous year, which restrained farmers' accessibility to essential inputs and increased production costs, with negative consequences on agricultural output.

Weak currency rate and economic instability put upward pressure on import costs and domestic prices

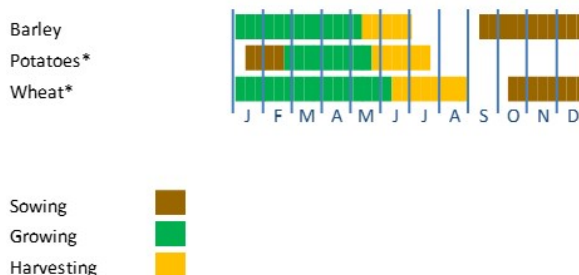
In 2024, food prices have increased across the country, but at different rates: more in government-controlled regions and less in the northeast's self-administration areas, a key food and energy production zone. Price disparities are essentially driven by ongoing internal conflict, economic country conditions, lack of energy and emerging regional, neighbouring conflicts which increases costs and creates further obstacles along the entire supply chain for both intraregional and interregional trade among regions.

In June 2024, the cost of living measured by the Minimum

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Crop Calendar

(*major foodcrop)



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Cereal Production

	2019-2023	2023	2024	change
	average		forecast	2024/2023
000 tonnes				
				percent
Wheat	2 347	2 300	1 930	-16.1
Barley	1 155	1 100	1 100	0.0
Maize	368	550	350	-36.4
Others	6	6	6	0.0
Total	3 876	3 956	3 386	-14.4

Note: Percentage change calculated from unrounded data.

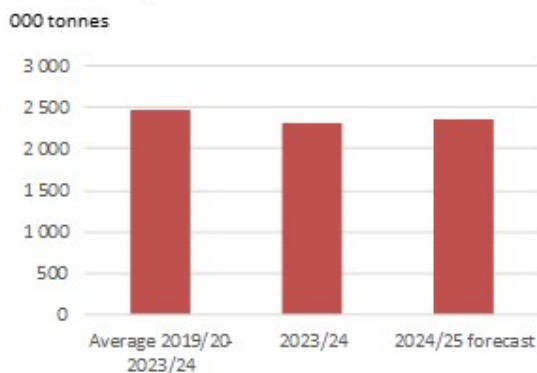
Expenditure Basket (MEB) surged by 92 percent year-on-year and more than tripled compared to 2022. The parallel exchange rate hovered around 14 900 SYP/USD, surging by 68 percent from 2023. Retail wheat flour prices averaged around SYP 9 700/kg, with an increase of about 50 percent compared to the price a year before. Wheat import requirements for the 2024/25 (July/June) marketing year are tentatively forecast at 1.6 million tonnes, around 8 percent below the average as private sector importers are likely to face obstacles considering the combination of currency devaluation, macroeconomic instability and the escalated conflict in the region putting upward pressure on import costs.

Food insecurity conditions expected to deteriorate in 2024

The suspension of the World Food Programme's (WFP's) general food assistance since the beginning of 2024 had a severe negative impact on food security. Funding shortages halted the delivery of food aid to 7.5 million people, including 3.5 million most vulnerable people. Some efforts to resume distributions are ongoing, even if they are likely to address only a small portion of the needs outlined in the 2024 Syria Humanitarian Response Plan. Between January and July 2024, about 195 000 households received food aid out of the 1.1 million households that were in need.

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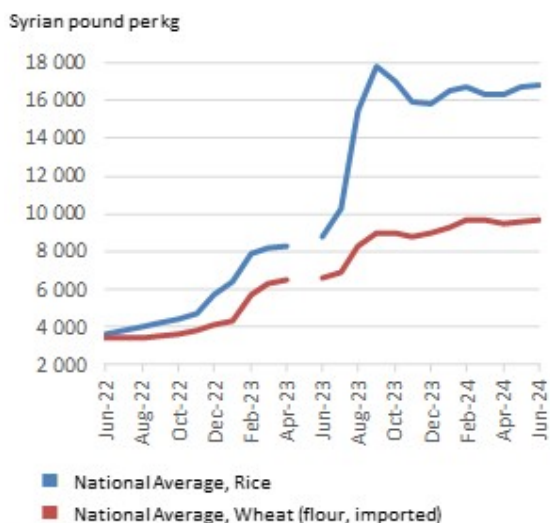
Cereals Imports



Notes: Includes rice in milled terms. Split years refer to individual crop marketing years (for rice, calendar year of second year shown).

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Retail prices of wheat flour and rice



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GIEWS Country Brief The Syrian Arab Republic

Reference Date: 11-January-2023

FOOD SECURITY SNAPSHOT

- Generally favourable sowing conditions, but high costs of inputs hinder sowing of 2023 cereal crops and overall agricultural production
- Below-average cereal harvest gathered in 2022
- Slightly below-average, yet still significant cereal import requirement forecast as economic crisis hampers ability to finance imports
- Economic challenges, continuing currency depreciation, energy and fuel shortages as well as high cost of living decrease purchasing power of population

Generally favourable sowing conditions, but high costs of inputs hinder agricultural production

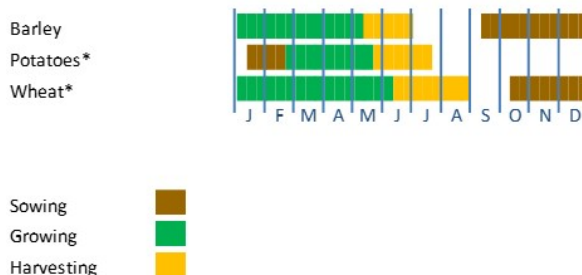
Sowing of winter wheat and barley crops, for harvest from May onwards, usually takes place between late September and December after seasonal rainfall replenish soil moisture. Although seasonal rainfall across much of the country started on time in September 2022, the amounts were rather limited. The first significant rainfall of the 2022/23 cropping season was recorded in November, with above-average amounts in all governorates. December 2022 rainfall, however, was significantly lower than average across the country, with the largest differences in Al Hassakeh (the main cereal producing governorate) and southern parts of the country. As of end-December 2022, barley sowings were nearing completion, while about 60 percent of planned winter wheat sowings were carried out under generally acceptable weather conditions. According to the latest seasonal weather forecast for the December 2022-February 2023 period, rainfall amounts are expected to be close to average in the northeast (including Al Hassakeh), while below-average precipitation amounts are expected in the northwest (including Aleppo, an important cereal producing governorate). In case of significant drier-than-average conditions, it would result in a third consecutive season affected by irregular rainfall.

Following well below-average harvests in 2021 and 2022, and coupled with the effects of broad macroeconomic challenges, farmers have limited financial resources and access to formal credit remains very constrained, while prices of inputs further increased.

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Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

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Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Wheat	1 803	1 045	1 100	5.3
Barley	1 138	268	300	11.9
Maize	124	100	100	0.0
Others	6	6	6	0.0
Total	3 070	1 419	1 506	6.1

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

The Agricultural Cooperative Bank (ACB) continues to provide very limited quantities of fertilizers at subsidized prices. In November/December 2022, the ACB sold urea for SYP 3 000/kg, significantly above the levels at which it was available in August 2022. However, as subsidized fertilizers are generally not always available across the country, farmers need to rely on local markets, where in summer months of 2022, 1 kg of urea cost from SYP 2 400 in Rural Damascus to SYP 4 300 in Homs, Hama and Tartous. As of December 2022, prices were approaching SYP 6 000/kg in most governorates. For comparison, the average nationwide price of 1 kg of urea in October 2021 was SYP 2 100. Similar increases were recorded for other fertilizers and crop protection material that, despite their often unknown origin and efficacy, remain available on the market, but are not accessible for many farmers with consequent low application rates.

Although the price of subsidized diesel remained unchanged at SYP 500/litre since 2021, it is unavailable at the subsidized price due to fiscal difficulties. The average free market price of diesel for transportation in September 2022 ranged from SYP 950/litre in Al Hassakeh to over SYP 6 800/litre in Hama and Sweida. As of November 2022, broad fuel shortages were reported across the country as a direct result of the economic crisis, leading to a variety of fuel serving measures, such as reducing fuel allocations for government vehicles, limiting the frequency of provision of the subsidized fuel for private vehicles, and postponing sporting events. In agriculture, fuel shortages could constrain the ability of farmers to carry out mechanized operations. In addition, combined with limited water availability in transborder river flows coupled, high fuel price may constraint farmers' ability to irrigate their crops in case of erratic rainfall.

The quantity of wheat seeds provided by the General Organization for Seed Multiplication (GOSM) is generally not sufficient to cover the national needs and farmers generally rely on the markets or saved seeds for planting.

Below-average cereal harvest gathered in 2022

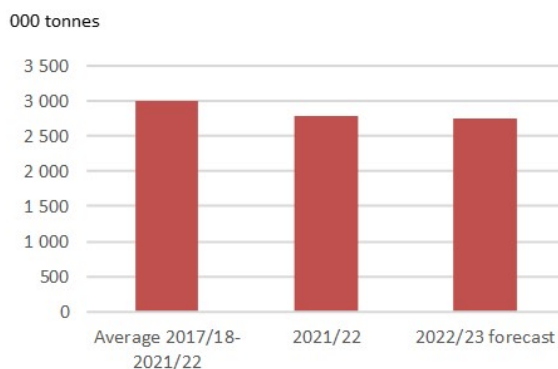
Erratic weather in the 2021/22 crop season, including insufficient and poorly distributed rainfall, frost and high temperatures, together with high cost of inputs (including fuel for pumping) and limited availability of irrigation water, resulted in a below-average cereal production. Wheat production in 2022 is estimated at around 1.1 million tonnes, with a marginal improvement compared to the 2021 harvest, but still one-quarter of the pre-crisis average of 4.1 million tonnes (during the period 2002-2011). At 300 000 tonnes, barley production is about 15 percent of the bumper harvests gathered in 2019 and 2020, and less than 40 percent of the pre-crisis average.

Despite the below-average production, the cereal import requirement in the 2022/23 marketing year is forecast at 2.7 million tonnes, about the same as in the previous year, but 10 percent below the five-year average as ongoing economic challenges and lack of foreign exchange hamper the country's ability to finance imports.

After two years of below-average harvests, elevated feed prices are increasing the cost of production for livestock farmers. In August 2022, despite the recent conclusion of the harvest, average barley prices reached almost SYP 2 300/kg, up over 40 percent compared to one year earlier. At the same time,

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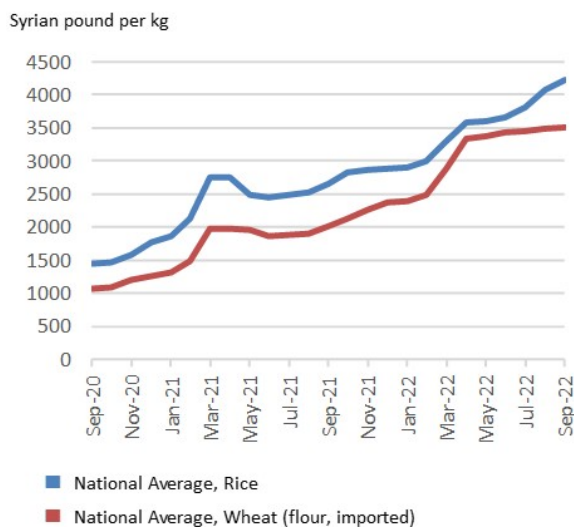
Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Syrian Arab Republic

Retail prices of wheat flour and rice



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

prices of live livestock remained virtually unchanged compared to one year before, with the largest increase of 6 percent recorded for sheep. Relatively stable prices of live animals indicate that destocking has temporarily stabilized, although it may restart soon due to high production costs.

Economic challenges increase food insecurity

Battered by 11 years of conflict and the spillover effects from the financial crisis in Lebanon that, until 2019, used to act as a financial intermediary, the national economy continues to weaken. In September 2022, the Central Bank of the Syrian Arab Republic increased the official exchange rate from SYP 2 800 to SYP 3 015/USD 1, and in early January 2023 it raised it further to SYP 4 522/USD 1. On the parallel market, as of December 2022, the United States dollar continued to strengthen, reaching SYP 7 000 at the end of the month, well above its December 2021 level of SYP 3 500. For reference, before the onset of the conflict in March 2011, USD 1 was traded for SYP 47.

Official estimates of the prevailing inflation have not been made available since 2020. However, elevated international commodity prices, coupled with rapid the depreciation of the Syrian pound on the parallel market indicate sustained increases in food price inflation. For example, at the national level, between September 2020 and September 2022, the average price of wheat flour increased by 250 percent, from SYP 1 000 to SYP 3 500.

The fuel scarcity and increase in fuel prices led to a rise in transportation and freight charges for goods, both imported and domestically produced, including agricultural and food products. Consequent additional price increases at retail level further constrained the already weakened purchasing power of the majority of the population threatening their food security.

Based on the World Food Programme's (WFP's) Consolidated Approach for Reporting Indicators (CARI, used in the Humanitarian Needs Overview, 2023), the food security and agriculture sector estimated that about 15 million people are in need of some form of food and agriculture assistance (representing 68 percent of the total population), of whom about 12.1 million are food insecure. About 2.9 million people are estimated to be at risk of food insecurity.

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GIEWS Country Brief The Syrian Arab Republic

Reference Date: 21-December-2021

FOOD SECURITY SNAPSHOT

- Erratic rainfall and high input costs hinder sowing of 2022 cereal crops
- Below-average cereal harvest gathered in 2021
- Livestock owners destocking herds as high feed prices and lack of pasture increased production costs
- Increasing numbers of food insecure in 2020, as economic challenges and rapid currency depreciation decrease purchasing power

Erratic rainfall and high input costs hinder sowing

Sowing of the 2022 wheat and barley crops are ongoing and are expected to conclude by the end of the year. The first substantial rainfall of the season was recorded in the second decade of November. Since September 2021, cumulative rainfall amounts ranged from about 60 percent of the average in Homs to almost 90 percent in Sweida. According to the latest seasonal weather forecast, drier-than-average conditions are likely to prevail until February 2022.

Following a well below-average 2021 harvest, coupled with the effects of broad macroeconomic challenges, farmers have limited their financial resources and credit is very constrained, while prices of inputs are increasing. The provision of fertilizers at subsidized prices ceased in June 2021. In October 2021, the average price of urea on the markets was SYP 2 100/kg, exceeding the liberalized price of SYP 1 400/kg. [Similar increases were recorded for other fertilizers and crop protection material](#) that, despite their often unknown origin and efficacy, remain available on the market, but are not accessible for many farmers with consequent low application rates.

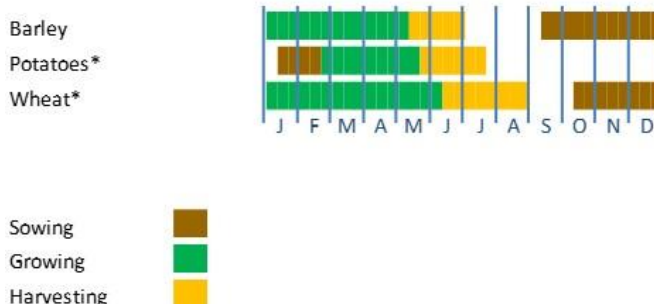
The availability of subsidized diesel is limited and prices have increased from SYP 180/litre in 2020 to SYP 500 in 2021. The average free market price in October 2021 was above SYP 2 800/litre, constraining farmers' ability to irrigate their crops in case erratic rainfall continues during the coming months. Limited water availability in transborder river flows and decreased water table across most of the country, are also expected to limit 2022 wheat production.

The quantity of wheat seeds provided by the General Organization for Seed Multiplication (GOSM) is generally not

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Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Syrian Arab Republic

Cereal Production

	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Wheat	1 914	2 800	1 045	-62.7
Barley	1 229	2 254	268	-88.1
Maize	140	150	100	-33.3
Others	6	6	6	0.0
Total	3 289	5 210	1 419	-72.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

sufficient to cover the national needs. In the current season, the cost of subsidized GOSM seed is SYP 1 585/kg, up from SYP 450/kg in 2020. In October 2021, the price of wheat seed on the markets was between SYP 1 500 to SYP 1 800/kg, depending on the location, up from SYP 500 to SYP 600/kg one year before.

Given unfavourable weather prospects and high production costs, area planted with cereals is likely to be lower than in previous years.

Below-average 2021 cereal harvest, livestock owners destocking

Insufficient and poorly distributed rainfall in the 2020/21 agricultural season, together with several heatwaves, the high cost of inputs, limited availability of irrigation water and high cost of fuel for pumping, resulted in a significant contraction of harvestable cereal area. The harvested wheat area is estimated at 787 000 hectares, slightly over half of the area harvested in 2019. The harvested barley area is estimated at 352 000 hectares, about 75 percent less than the previous year as large swathes of land were not deemed worth harvesting. Wheat production in 2021 is estimated at around 1.05 million tonnes, down from 2.8 million in 2020 and only one-quarter of the pre-crisis average of 4.1 million tonnes (during the period 2002-2011). At 268 000 tonnes, barley production is about 10 percent of the bumper harvests in 2019 and 2020. Details about the 2020/21 agricultural season are provided in the [2021 FAO Crop and Food Supply Assessment Mission report](#).

High feed prices and lack of pasture are likely to result in extensive destocking. Prices of live animals have already decreased compared to last year, as farmers have sold part of their herds to gain liquidity to purchase feed and other inputs for the remaining animals.

Economic challenges increase food insecurity and threaten agricultural production

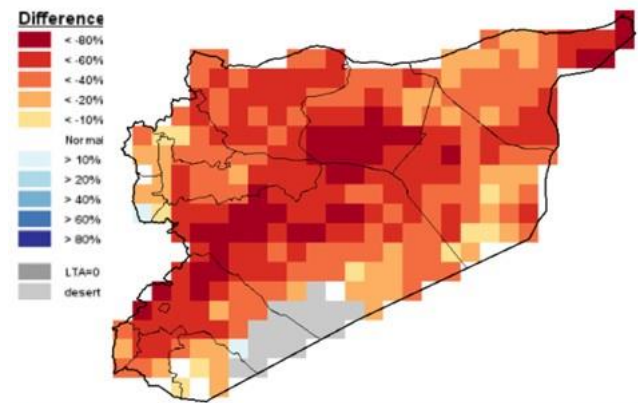
Battered by ten years of conflict and spill-over effects from the financial crisis in Lebanon which used to act as a financial intermediary, the national economy continues to weaken. The Central Bank of the Syrian Arab Republic maintains the official exchange rate of USD 1 at SYP 2 512, set in April 2021. On the parallel market, in early December 2021, USD 1 was traded for SYP 3 500, though this is significantly below the levels of SYP 4 700 seen in April 2021, before the introduction of 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.

Without updated estimates for 2021, the World Food Programme (WFP) estimated that about 12.4 million people (60 percent of the overall population) were food insecure in 2020, 5.4 million more than at the end of 2019, mostly due to constrained livelihood opportunities and the rapidly worsening economy. However, as of December 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.

Food security deteriorated in 2021 across the country due to a challenging macroeconomic environment, rapid currency devaluation and lack of livelihood opportunities. The situation has also worsened in the northern part of the country, which was

Syrian Arab Republic - Precipitation anomaly

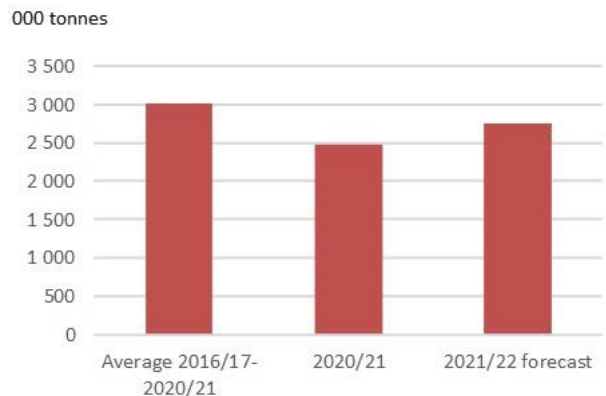
Relative difference to Long Term Average - November 2021



Source: FAO/GIEWS Earth Observation System.

Syrian Arab Republic

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

using Turkish Lira (TRY) as a de facto currency. Following the currency crisis in Turkey, the Turkish Lira lost 40 percent of its value in one year. In early 2021, USD 1 was sold for about TRY 7 to TRY 8, slowly climbed to TRY 9 in October, reaching TRY 14 in late November 2021, constraining the purchasing power of the population.

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GIEWS Country Brief

The Syrian Arab Republic

Reference Date: 04-May-2021

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.

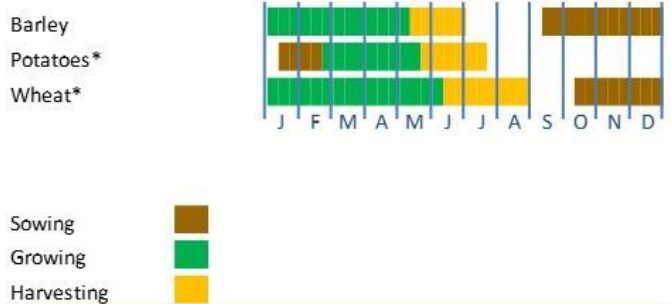
High costs of inputs hinder agricultural activities

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

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Syrian Arab Republic

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	1 843	2 176	2 800	28.7
Barley	971	2 000	2 254	12.7
Maize	131	121	150	24.0
Others	6	6	6	0.0
Total	2 951	4 303	5 210	21.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

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 1 175/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.

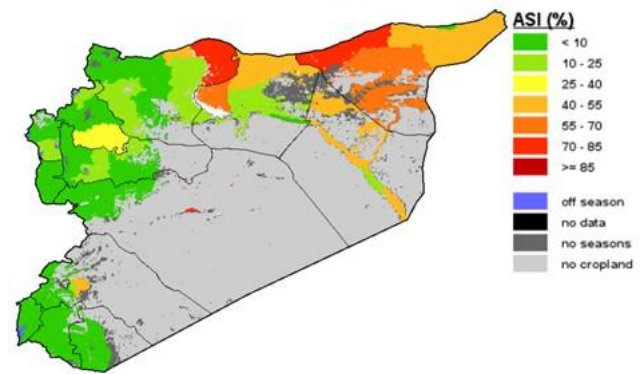
In March 2021, the Government announced a local purchasing price for the 2021 wheat at SYP 900/kg (using the official exchange rate as of mid-April 2021, equivalent to USD 350/tonne), almost double the 2020 purchasing price (SYP 425/kg). Despite the increased price, it is likely that quantities purchased 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

Syrian Arab Republic - Agricultural Stress Index (ASI)

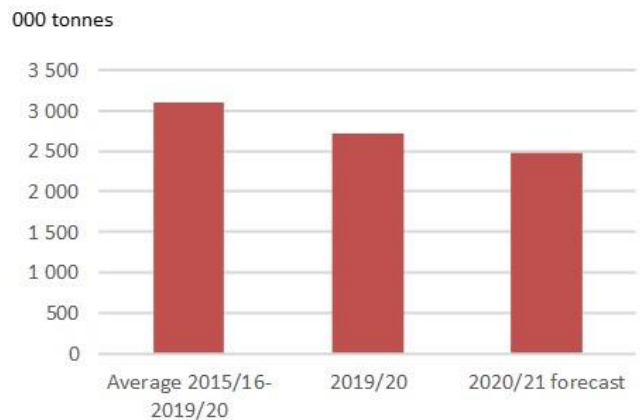
from start of season 1 to dekad 2, April 2021



Source: FAO/GIEWS Earth Observation System.

Syrian Arab Republic

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

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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GIEWS Country Brief

The Syrian Arab Republic

Reference Date: 22-December-2020

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for development of 2021 crops, but high input costs hinder agricultural activities
- Wheat harvest in 2020 above five-year average but still below pre-crisis levels
- Economic challenges increase food insecurity

Favourable weather conditions, but high input costs hinder agricultural activities

The sowing of the 2021 barley crop started in mid-October and is still underway. Wheat sowing started in November and is about to conclude. The first substantial rainfall of the season, easing concerns over an early season drought, was recorded in November. As of early December, some pockets of dry weather conditions prevailed in the most eastern part of Hassakeh, the governorate with the largest planted area and cereal production in the country.

Agricultural activities have been hampered by the high prices of domestic and imported inputs due to the dramatic currency depreciation and high transportation costs, resulting from fuel shortages. Diesel shortages have adversely affected mechanized operations during the winter season and are likely to continue in the future.

For the planting in 2020, the General Organization for Seed Multiplication (GOSM) provided wheat seed at a subsidized price of SYP 450/kg. Farmers were eligible to purchase 25 kg of seeds for each registered donum (equivalent to 0.1 hectare), which, assuming satisfactory quality, would be an adequate seeding rate. The GOSM current supply capacity is estimated to cover only 20 percent of the total wheat seed demand. On most markets, wheat seeds in October were traded on average for about SYP 560/kg, while in Rural Damascus the price was as high as SYP 800/kg. Barley seeds were sold by GOSM at SYP 200/kg, while on retail markets they were sold for SYP 500/kg, reaching SYP 700/kg in Rural Damascus. Because of the inability of GOSM to fulfil farmers' seed needs in their entirety, most likely farmers used seeds saved from the previous season. The Agriculture Bank provided nitrate fertilizer at the subsidized price of SYP 214/kg (the average market rate in October was SYP 1 000/kg), an increase from SYP 108/kg last year and phosphate at SYP 250/kg (compared to SYP 690/kg on

Syrian Arab Republic

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Syrian Arab Republic

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	1 843	2 176	2 800	28.7
Barley	971	2 000	2 254	12.7
Maize	131	121	150	24.0
Others	6	6	6	0.0
Total	2 951	4 303	5 210	21.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

the market), an increase from SYP 175/kg last year. Overall, the quantities provided at subsidized prices were insufficient to cover national needs.

Although the global economic slowdown due to the COVID-19 pandemic has depressed global oil prices, the country is grappling with fuel shortages due to international sanctions and currency depreciation. Although farmers are eligible to buy diesel at SYP 185/litre, they rely on the open market due to general shortages.

In August and September 2020, more than 22 000 hectares of forests and orchards were burnt in Homs, Hama, Latakia and Tartous. About 40 percent of which were agricultural lands.

Above-average 2020 cereal harvest, but still below pre-crisis level

Favourable weather conditions led to an upturn in the 2020 cereal production estimated at 5.2 million tonnes, over 20 percent more than in the previous year and about 77 percent above the five-year average. The 2020 wheat production is estimated at 2.8 million tonnes, up from 2.2 million tonnes in 2019, but still well below the pre-crisis level of 4.1 million tonnes (2002-2011).

The General Establishment for Cereal Processing and Trade (Hoboob) remains the exclusive institution in charge of purchasing locally-produced wheat. The Government allocated SYP 450 billion for purchases of domestic wheat at SYP 400/kg (equivalent to about USD 150/tonne, using the June 2020 parallel exchange rate). Reports from late October 2020 indicate that Hoboob purchased about 690 000 tonnes of wheat to be used in the 2020/21 marketing year for the production of subsidized bread. Before the conflict, the purchasing targets were about 2 million tonnes. Information on the actual amount of cereals in stocks is not available. Details are discussed in GIEWS Update [“Syrian Arab Republic: National cereal balance”](#)

Economic woes increase food insecurity

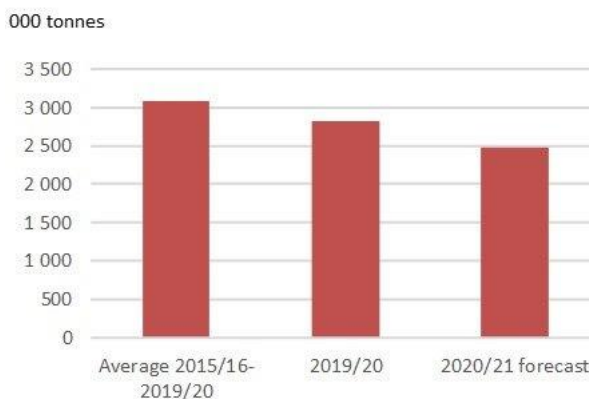
The entire economy, already battered by nine years of conflict, suffers spill-over effects from the financial crisis in Lebanon which before acted as a financial intermediary. The Economist Intelligence Unit estimates the price inflation in 2020 at almost 100 percent. In June 2020, the official fixed exchange rate was raised from SYP 704/US dollar to SYP 1 256/US dollar to entice the use of official channels. On the parallel market, in September 2019, USD 1 was traded for SYP 600, while in mid-December 2020 it was sold for SYP 2 700. The rapid devaluation brought industrial production to a stand-still, as industrialists were unable to purchase inputs, with a consequent increase in unemployment rates.

There is a severe shortage of essentials, 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 reduced the weight of each pack from about 2.8 to 2.4 pounds and imposed limits on how many packs can be purchased by each family. Overall, subsidized bread remains four times less expensive than the free market.

Subsidized fuel for general use, available through smart fuel cards, should sell for SYP 250/litre of “type 90” and SYP 575/litre

Syrian Arab Republic

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

of “type 95.” On the open market the average fuel price in October was SYP 700/litre, well below the SYP 1 000/litre registered the month before.

As of 2020, the World Food Programme (WFP) estimates that 9.3 million people are food insecure with a further 2.2 million people at risk of food insecurity, an increase from 7.9 million and 1.9 million, respectively in 2019. As of October 2020, 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 live abroad without refugee registration.

The COVID-19 pandemic aggravated the already challenging situation that the country has been facing amidst high unemployment rates, rapid currency devaluation and the absence of an adequate social safety net system. Many casual labourers rely on their daily wages, which have decreased significantly.

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GIEWS Country Brief The Syrian Arab Republic

Reference Date: 19-May-2020

FOOD SECURITY SNAPSHOT

- **Favourable cereal production prospects, but structural issues continue to constrain agricultural activities**
- **Stable import requirement forecast in 2020/21 marketing year**
- **Elevated prices, stagnant salaries and high unemployment rates increase food insecurity**

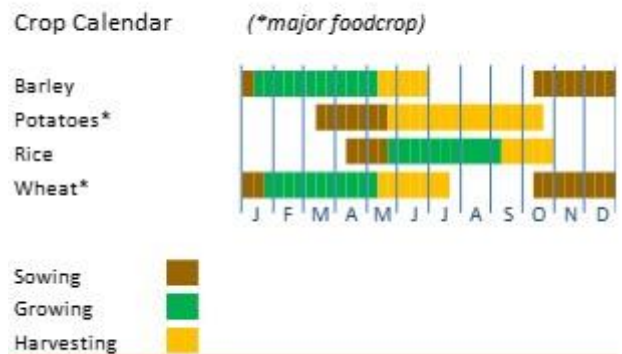
Favourable cereal production prospects, but structural issues continue to constrain agricultural activities

The harvest of the 2020 barley crop started in early May, while wheat will be harvested from the end of May. Ample and well-distributed rainfall maintained favourable crop conditions throughout the season. About 1.3 million hectares were planted with wheat in autumn 2019, slightly less than the 1.35 million hectares of the previous year. Usually not the entire area planted is harvested due to a variety of reasons, such as pests and diseases or accidental field fires: in the previous year, about 94 percent of planted area was harvested. Assuming favourable weather conditions prevail until the harvesting period, the 2020 wheat production is forecast at 2.6 million tonnes, up from 2.2 million tonnes in 2019, but still well below the pre-crisis level of 4.1 million tonnes (2002-2011). Although similar favourable conditions prevailed in 2019, high temperatures in May 2019 had an adverse effect on wheat grain filling, constraining yields.

For the 2020 harvest, barley was planted on an estimated 1.499 million hectares, slightly more than the 1.456 million hectares planted in the previous year, out of which 92 percent was harvested. An above-average harvest of 1.7 million tonnes is forecast, more than double the pre-crisis average. To obtain a better price, barley is often informally traded to Lebanon.

The General Establishment for Cereal Processing and Trade (Hoboob) remains the exclusive purchaser of wheat. For the current season, the Government allocated SYP 450 billion for wheat purchases and, out of this amount, SYP 150 billion was already transferred to the Agricultural Bank to be disbursed to farmers. The 2020 purchasing prices for first grade wheat were set at SYP 225/kg (equivalent to USD 0.18/kg), with a bonus of SYP 25 for delivery included. The purchasing price for the same grade in 2019 was SYP 185/kg, including a bonus of SYP 15. In previous years, most grain purchased by Hoboob fell into the

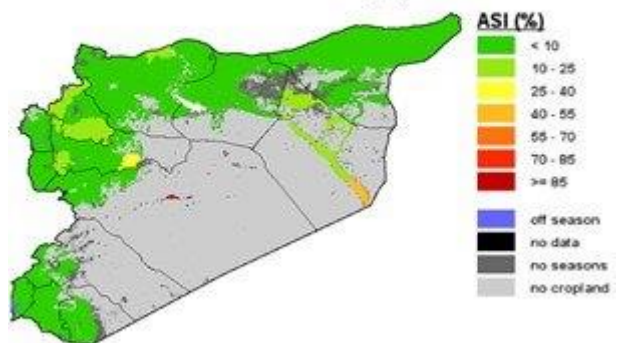
Syrian Arab Republic



Source: FAO/GIEWS.

Syrian Arab Republic - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, April 2020



Source: FAO/GIEWS Earth Observation System.

second grade category, for which payment is slightly less. To sell to Hoboob in the past, farmers had to purchase new hessian sacks and deliver them to the collection place. Other entities were purchasing grain at the same price as Hoboob, but collecting it on farms and not requiring the use of new sacks. Reports indicate that, this year more bags for selling to Hoboob will be available for purchase by Hoboob.

Farmers continue to be concerned about the high production and transportation costs as well as the lack of quality inputs. Despite the Government's initiatives to increase the availability of farm machinery, it generally remains insufficient. Some progress has been made on the rehabilitation of irrigation structures, although many farmers report lack of maintenance. Wastage of fruit and vegetable production continues to be high as a consequence of low consumer purchasing power, lack of export markets and the shortage of domestic processing factories.

Stable import requirement forecast in 2020/21 marketing year

The country normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, cereal import requirements in the 2020/21 marketing year (July/June) are forecast at 2.7 million tonnes, similar to the previous year and about 15 percent below the five-year average. Most of the cereal imports are sourced from the Russian Federation.

Press reports indicate problems in securing wheat imports in 2020 because of logistical difficulties, expensive freight and insurance costs due to sanctions imposed on the country. In late March, the Government, normally the exclusive importer of wheat via Hoboob, granted a permission to the private sector to import also wheat flour for bread baking purposes and not, as in the past, only wheat flour to produce pasta.

Elevated prices, stagnant salaries and high unemployment rates increase food insecurity

The entire economy, already battered by nine years of conflict, suffers spill over effects from the economic and financial crisis in Lebanon where the shortage of US dollars and informal capital controls introduced by the banks have constrained withdrawals denominated in US dollars as well as foreign transactions. In the past, many Syrians kept their US dollar deposits in Lebanese banks that paid generous interest rates and were considered a store of value. Imports of goods to the country are particularly affected as many traders rely on their accounts in Lebanon to finance transactions. Following the introduction of capital controls in Lebanon in October 2019, traders started purchasing US dollars on the parallel market in the Syrian Arab Republic, putting an upward pressure on the exchange rate. In September 2019, USD 1 was traded for SYP 600, while in May 2020 it was sold for SYP 1 550. The Central Bank of Syria maintains two rates: the official rate at SYP 435 per US dollar and an intermediary rate of SYP 706 per US dollar used for import financing, remittances, and selling of US dollars to the Central Bank.

The rapid devaluation brought industrial production to a stand-still, as industrialists were unable to purchase inputs, with a consequent increase in unemployment rates.

In April 2020, the price of a World Food Programme (WFP) reference food basket (bread, rice, lentils, sugar and vegetable oil) increased on average by 107 percent across the country compared to April 2019. The largest increases were recorded in

Syrian Arab Republic

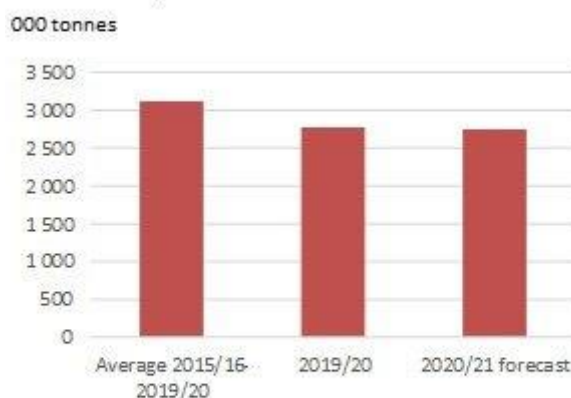
Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019 percent
	000 tonnes			
Wheat	1 843	2 176	2 700	24.1
Barley	971	2 000	1 700	-15.0
Maize	131	121	150	24.0
Others	6	6	6	0.0
Total	2 951	4 303	4 556	5.9

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

Syrian Arab Republic

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Sweida (152 percent), Hama and Homs (each at 133 percent). Between March and April 2020, the cost of the basket increased by 20 percent, mainly due to stockpiling by households facing the COVID-19 pandemic.

A smart card system, previously used only for fuel products, was expanded in February 2020 to include rationed quantities of rice, tea and sugar. Every month, each family is allowed to purchase up to 1 kg of tea (at SYP 900 per 200 gr), 3 kg of rice (at SYP 400 per kg), and 4 kg of sugar (at SYP 350 per kg). The Government is considering using the smart card also to allocate subsidised bread. Although no formal rationing of bread exists at the moment, bakeries have already been informally rationing bread.

In November 2019, the Government raised the salaries of public employees by SYP 20 000 and pensions by SYP 16 000. Imports that are paid in US dollars are banned for those goods that have a domestically produced alternative on the markets.

According to the nationwide assessment conducted by the WFP in 2019, there are 7.9 million people unable to meet their food needs and a further 1.9 million are at risk of food insecurity. This figure is likely to increase in 2020 as a result of the high food prices, stagnant wages and limited livelihood opportunities.

As of early March, the humanitarian situation remains dire in the northwest where about 840 000 of the nearly 1 million people displaced between December 2019 and early March 2020 reportedly remain in displacement.

As of late January 2020, over 5.6 million Syrian refugees were registered in Egypt, Iraq, Jordan, Lebanon and Turkey. The number of registered refugees has been stable since early 2018. In addition, a large number of Syrians live abroad without seeking refugee registration.

COVID-19 and measures adopted by the Government

The country started implementing containment measures on mid-March 2020, including public health requirements, restrictions on movements and gatherings, closure of markets as well as the adoption of social distancing measures. Curfews, originally running from 18:00 to 06:00 hours, were eased to 19:30 to 06:00 hours during the Ramadan. Markets are opened from 08:00 to 15:00 hours. Some geographic areas are in total lockdown. Curfew violations in the northeast part of the country are fined from SYP 5 000 to SYP 45 000.

Most land borders are closed; exceptions include some trans-border movements of goods (both commercial and relief) and movements of humanitarian and international organizations personnel. Travel within and between governorates is banned, with the exception of emergency, humanitarian and essential services. As all schools were closed on 15 March 2020, the provision of WFP school feeding assistance to more than 1 million children was suspended.

The COVID-19 outbreak aggravated the already challenging situation that the country has been facing amidst high unemployment rates, rapid currency devaluation and the absence of an adequate social safety net system. Many casual labourers rely on their daily wages. The Government was considering to compensate each worker affected by the lockdown with SYP 100 000, but the plan lacked the fiscal coverage.

The Government allocated SYP 100 billion to confront the epidemic, although the details of the programme have not been provided. It is foreseen that some tax exemptions will be granted to businesses.

To keep the markets well supplied, the Government has simplified the requirements for importing food and medicine. Temporary export bans have been put in place for medicines, bleach as well as some food products.

Among international efforts, in mid-March 2020, the Government requested the international community to lift the sanctions to increase the capacity of the national health system to cope better with the COVID-19 outbreak.

Fears persist that a high concentration of people in displacement camps, not well suited to practice social distancing, would facilitate the transmission of the disease.

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GLEWS Country Brief

The Syrian Arab Republic

Reference Date: 05-September-2019

FOOD SECURITY SNAPSHOT

- Rains improved 2019 cereal harvest, but structural issues continue to constrain production potential
- Import requirements expected to decrease in 2018/19 marketing year
- About 6.5 million people estimated to be food insecure in 2019

Rains improved 2019 cereal harvest, but structural issues continue to constrain production potential

The wheat and barley harvests were concluded by July. Ample and well-distributed rainfall in the 2018/19 agricultural season, coupled with improved security that facilitated returns of the internally displaced, resulted in a significant expansion of the area under cereals. The 2019 harvested wheat area (1.26 million hectares) was almost double than in 2018, but it was still 25 percent below the pre-crisis (2002-2011) average. The 2019 harvested barley area (1.34 million hectares) increased by over 70 percent compared to previous year and was similar to the pre-crisis average. High temperatures in May had an adverse effect on wheat grain filling, constraining yields. According to the FAO/WFP Crop and Food Security Assessment Mission, fielded in June and July 2019, the 2019 wheat production is estimated at 2.2 million tonnes, up from 1.2 million tonnes in 2018, but still below the pre-crisis level of 4.1 million tonnes (2002-2011). At 2 million tonnes, the barley harvest is more than five times that of 2018 and over 150 percent higher than the pre-crisis levels.

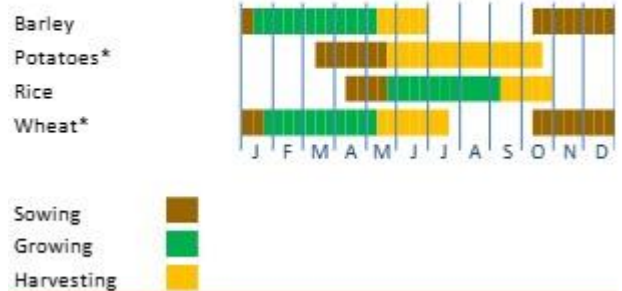
Although fires on standing cereal crops are not unusual near the harvest time, they were much more frequent and intense in 2019 due to high temperatures and strong winds. The Government estimated that about 85 000 hectares of crops were burnt in 2019. Many fires may have started accidentally, but there is evidence to suggest that some started maliciously.

Farmers continue raising concerns about the high production costs, high transportation costs and lack of quality inputs. Despite Government initiatives have led to an increase in the disposal of farm machinery, the overall availability remains insufficient. Some progress has been made on the rehabilitation of irrigation structures although many farmers reported lack of maintenance. High rates of wastage were reported in fruit and vegetable production, constrained by low consumer purchasing power, the

Syrian Arab Republic

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Syrian Arab Republic

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	2 063	1 200	2 176	81.3
Barley	540	390	2 000	412.8
Maize	120	118	121	2.5
Others	6	6	6	0.0
Total	2 729	1 714	4 303	151.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

inability to export outside the country and a shortage of domestic processing factories.

Import requirement to decrease in 2019/20 marketing year

The country normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, cereal import requirements in the 2019/20 marketing year (July/June) are forecast at 2.7 million tonnes, about 10 percent above the five-year average. Most of the cereal imports are sourced from the Russian Federation.

About 6.5 million people estimated to be food insecure

About 6.5 million people are estimated to be food insecure and in need of food and livelihoods support. An additional 2.5 million people are at risk of food insecurity and need livelihoods support to strengthen their resilience.

While prices had initially decreased since their peak in December 2016, they have been gradually increasing again over the past 12 to 14 months largely as a result of higher fuel prices and a continuous depreciation of the Syrian Pound on the informal exchange market (the SYP has depreciated by 34 percent against the US Dollar since June 2018).

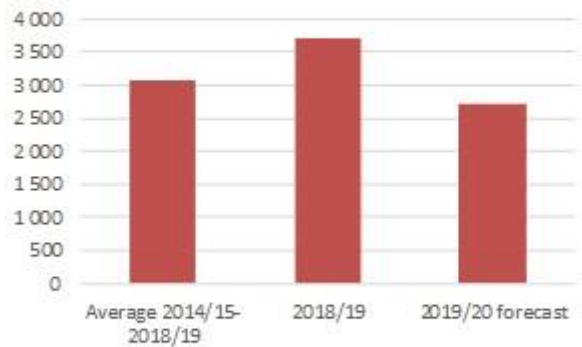
As of late August 2019, over 5.6 million Syrian refugees were registered in Egypt, Iraq, Jordan, Lebanon and Turkey. The number of registered refugees has been stable since early 2018. In addition, a large number of Syrians live abroad without seeking refugee registration.

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Syrian Arab Republic

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GLEWS Country Brief

The Syrian Arab Republic

Reference Date: 17-October-2018

FOOD SECURITY SNAPSHOT

- **Sharp decline in cereal production due to unfavourable rain distribution**
- **Import requirements expected to increase in 2018/19 marketing year**
- **Modest economic recovery forecast as security improves**
- **Between 6 and 6.3 million people estimated to be food insecure as of August 2018**

Sharp decline in cereal production due to unfavourable rain distribution

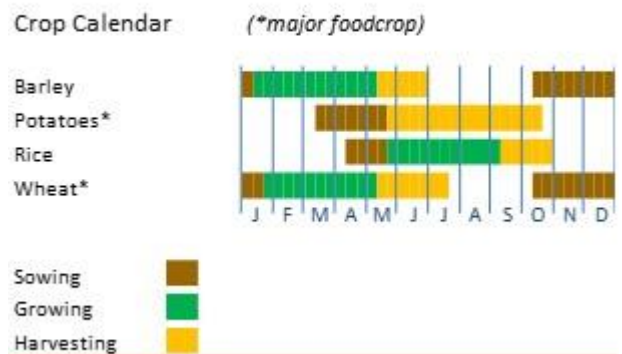
Despite better security granting improved access to agricultural land in some areas, production of wheat and barley declined sharply in 2018 compared to the previous year due to erratic weather. The 2018 wheat production is estimated at 1.2 million tonnes, the lowest level since 1989 and about 30 percent of the pre-conflict average of 4.1 million tonnes (2002-2011). Barley production is estimated at 390 000 tonnes, the lowest level since 2008. An extended dry period early in the season severely affected large areas of rain-fed cereals, while yields of irrigated cereal were also reduced because of unseasonably late heavy rains and high temperatures.

High production costs, lack of quality inputs and damaged or destroyed infrastructure remain the main constraints to the crop production. However, some progress was made on reconstruction of irrigation infrastructure and improved transport of farm inputs and produce. Given a poor cereal harvest in 2017/18 season, seed is very likely to be in extremely short supply for the 2018/19 season, planting of which starts from October and the bulk is usually planted in November.

Import requirement to increase in 2018/19 marketing year

The country normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, cereal import requirements in the 2018/19 marketing year (July/June) are forecast at 3.7 million tonnes, about 30 percent above the five-year average. Most of the cereal imports are sourced from the Russian Federation.

Syrian Arab Republic



Source: FAO/GIEWS.

Syrian Arab Republic

Cereal Production

	2013-2017	2017	2018	change
	average		forecast	2018/2017
000 tonnes				
percent				
Wheat	2 460	1 793	1 200	-33.1
Barley	644	777	400	-48.5
Others	6	6	6	0.0
Total	3 228	2 706	1 724	-36.3

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Limited economic recovery forecast as security improves

The conflict, which started in March 2011, became more geographically constrained in 2017, with some initial reconstruction efforts getting underway. After 6 years of economic contraction, diving to over 20 percent in 2012 and 2013, the GDP grew by 1.9 percent in 2017. A stronger GDP growth of 6.2 percent is forecast in 2018 as reconstruction efforts are expected to continue amidst lack of finances and depleted workforce.

Despite supply bottlenecks driven by localized fighting continue to exercise an upward pressures on price levels, inflation in 2017 (January-May, last information available) eased to an estimated 33 percent, down from over 47 percent in 2016, reflecting relative stabilization of local currency.

The official exchange rate for the US dollar (USD) against the Syrian Pound (SYP) was set by the Central Bank of the Syrian Arab Republic in November 2017 at SYP 434 per USD, down from SYP 517 per USD in June 2017. The slight strengthening of the exchange rate is attributed to the increased flow of remittances easing hard-currency shortages as a result of improved security.

Between 6 and 6.3 million people are estimated to be food insecure

Population displacement continues to be the main driver of food insecurity in the country. Currently there are about 6.2 million internally displaced people, including 1.3 million displacements of people since January 2018, some of them being displaced several times. The largest number of IDPs within the country is hosted in Rural Damascus, followed by Idleb and Aleppo governorates.

A FAO/WFP Crop and Food Security Assessment Mission visited the country in June/July 2018 and estimated that 5.5 million Syrians are food insecure and require some form of food assistance. In addition, between 500 000 to 800 000 people may be food insecure in Idleb Governorate.

Market access and trade has considerably improved in the last year due to the revival of important trade routes across the country, which had been disrupted since 2013. Access to markets remains severely constrained in Idleb and south Deir-ez-Zor governorates.

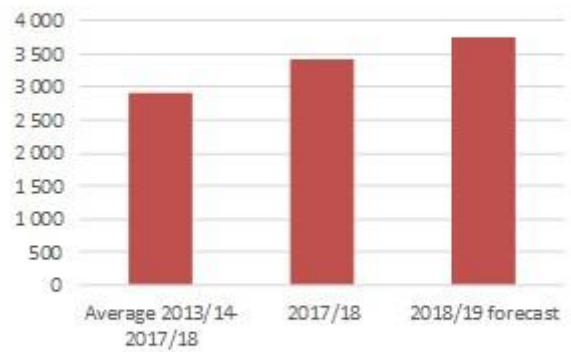
As of early October 2018, over 5.6 million Syrian refugees are registered in Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large number of Syrians live abroad without seeking refugee registration.

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Syrian Arab Republic

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



GIIEWS Country Brief

The Syrian Arab Republic

Reference Date: 21-June-2018

FOOD SECURITY SNAPSHOT

- **Weather and conflict constrain agricultural production**
- **Import requirement to remain stable in 2018/19 marketing year**
- **Some economic recovery forecast as security improves**
- **Almost 6.5 million people food insecure**

Weather and conflict constrain agricultural production

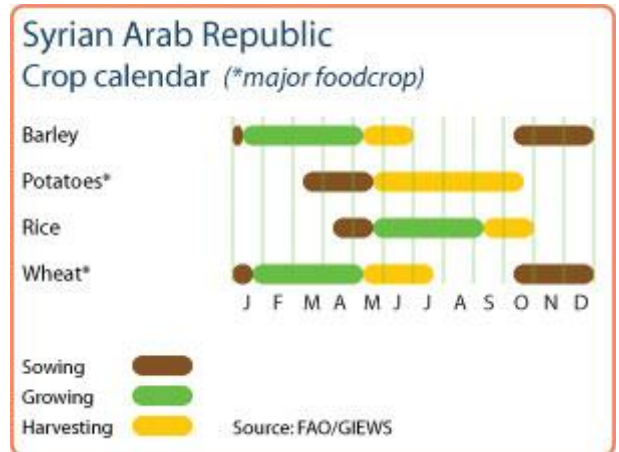
Harvesting of the 2018 winter wheat and barley crops started in late May and is expected to finish in early July. The lack of rains from October 2017 to early January 2018 delayed sowings in some parts of the country. Early soil moisture deficit was partially compensated by good precipitation received in the spring. However, high production costs, lack of inputs and damaged or destroyed infrastructure, including irrigation, continue to hamper agricultural production. Remote sensing information indicates that some fields in eastern Hassakeh and parts of Aleppo, Raqqa and Dayr Az Zor might have not been sown, possibly due to conflict-related constraints. Consequently, a below-average cereal harvest is expected to be gathered in 2018.

Import requirement increased in 2017/18 marketing year

The country normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, the cereal import requirement in the 2017/18 marketing year (July/June) is forecast at 3.4 million tonnes, about 20 percent above the five-year average. Most of the cereal imports are sourced from the Russian Federation.

Limited economic recovery forecast as security improves

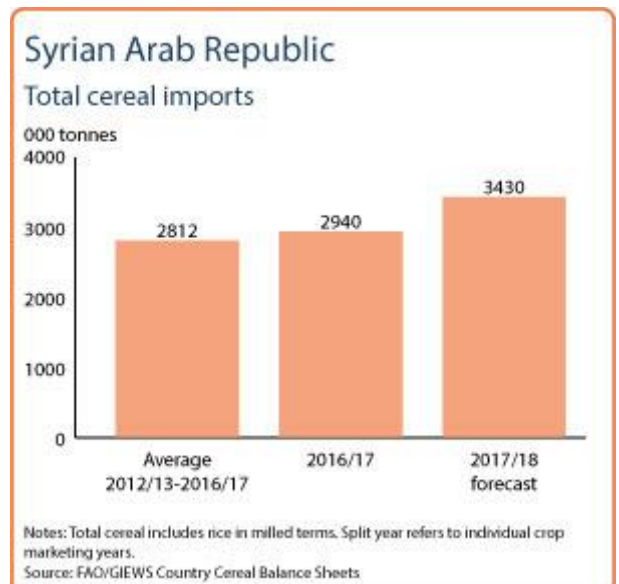
The conflict, which started in March 2011, continues to severely affect the country, although limited stabilization and recovery are taking place due to localized improvements in security. A positive GDP growth of 1.9 percent was estimated for 2017 as constrained reconstruction efforts begun, compared to a contraction of 3.4 percent in 2016. A positive GDP growth of 6.3 percent is forecast for 2018 as limited reconstruction efforts continue, hampered by the lack of finances and labour shortages.



Syrian Arab Republic
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes			percent
Wheat	2 823	2 937	1 793	-39
Barley	634	500	777	55
Maize	144	182	130	-29
Others	6	6	6	0
Total	3 606	3 624	2 706	-25

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



Albeit down from over 40 percent in 2016, inflation in 2017 remained high at almost 30 percent, reflecting supply bottlenecks, cuts to subsidies and currency depreciation. Although precise statistics are not available, the unemployment rate is estimated at about 50 percent up from about 10 percent at the beginning of the conflict.

The official exchange rate for the US dollar (USD) against the Syrian Pound (SYP) was set by the Central Bank of the Syrian Arab Republic in November 2017 at SYP 434 per USD, down from SYP 517 per USD in June 2017. The slight strengthening of the exchange rate is attributed to the increased flow of remittances easing hard-currency shortages as a result of improved security.

About 6.5 million people are food insecure

As of September 2017 (latest available figures), about 6.5 million people face large food consumption gaps and extreme loss of livelihood assets, contributing to food consumption gaps in the short term. A further 4 million people are at risk of becoming food insecure due to the depletion of assets to maintain food consumption.

Syrians have to resort to food coping strategies to cover the severe food shortages they are facing. Some 50 percent of the households have reduced the number of meals and more than 30 percent have restricted the consumption to adults to prioritize children. During the eight years of the crisis, the large majority of the households have depleted their assets and are no longer able to draw on stocks or other reserves. They resort to child labour or have to withdraw their children from school to cope.

As of May 2018, almost 5.7 million Syrian refugees are registered in Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large number of Syrians live abroad without seeking refugee registration.

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GIEWS Country Brief The Syrian Arab Republic

Reference Date: 17-October-2017

FOOD SECURITY SNAPSHOT

- New agricultural season about to start, but production constraints continue to prevail
- Some recovery in 2017 cereal production due to better rains and localized improvements in security, but still less than half of pre-conflict average
- Food security situation severely impacted by prolonged conflict, especially for most vulnerable groups
- About 6.9 million people food insecure

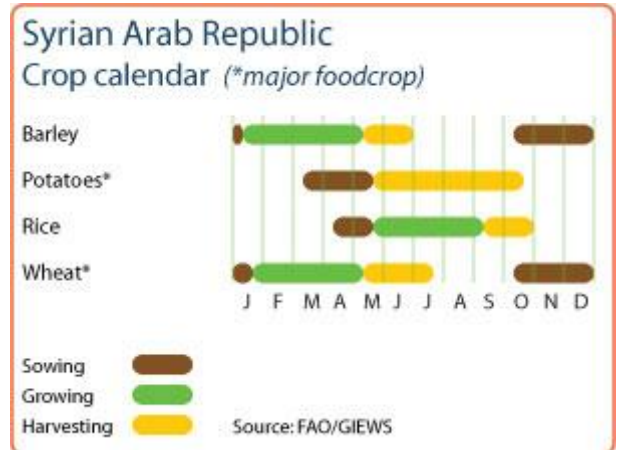
New agricultural season about to start, but production constraints still prevail

The planting of the 2017/18 winter season wheat and barley crops will start in the second decade of October. Current climatic conditions remain favourable for land preparation. However, high production costs, lack of inputs and damaged or destroyed infrastructure, including irrigation, continue to constrain agricultural production.

Below-average cereal harvest in 2017

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2017. The Mission estimated the 2017 wheat harvest at about 1.8 million tonnes, some 12 percent more than last year's record low harvest, but still much less than half of the pre-conflict average of 4.1 million tonnes (2002-2011). The slight increase in production was attributed to better rainfall and some local improvements in civil security, which allowed for a larger share of the planted area to be harvested. Being predominantly rainfed and more resilient than wheat, barley production was estimated at 777 000 tonnes, almost 8 percent higher than last year. Barley production varies greatly for year to year. Livestock often graze the unharvested areas of barley.

Over the past two years, herd sizes have stabilized albeit at a very low level. The main constraints restricting livestock production continue to be high fodder prices, insufficient coverage of veterinary services and access to grazing areas in parts of the country due to the compromised security situation. Improved pasture conditions, benefiting from higher rainfall, should ease the pressure from high fodder prices, provided that the access is possible.



Syrian Arab Republic
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	2 230	1 601	1 793	12
Barley	786	722	777	8
Maize	130	130	130	0
Others	8	8	8	0
Total	3 154	2 461	2 708	10

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

Import requirement to increase in 2017/18 marketing year

The country normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, the cereal import requirement in the current 2017/18 marketing year (July/June) is forecast at 3.4 million tonnes, with an increase of 17 percent compared to the previous year.

Economic prospects still deteriorating

The GDP in 2016 contracted by 3.4 percent, less than the 5.3 percent contraction recorded in 2015. A positive GDP growth of 1.8 percent is forecast for 2017 as some limited reconstruction efforts are likely to begin, hampered by lack of finances. Inflation in 2016 increased to an estimated 43.9 percent, up from 38 percent in 2015 reflecting general shortages and cuts in fuel and some food subsidies. Although precise statistics are not available, the unemployment rate is estimated at about 50 percent up from about 10 percent at the beginning of the conflict. The official exchange rate for the US Dollar (USD) against the Syrian Pound (SYP) was set by the Central Bank of the Syrian Arab Republic in June 2017 at SYP 517 per USD.

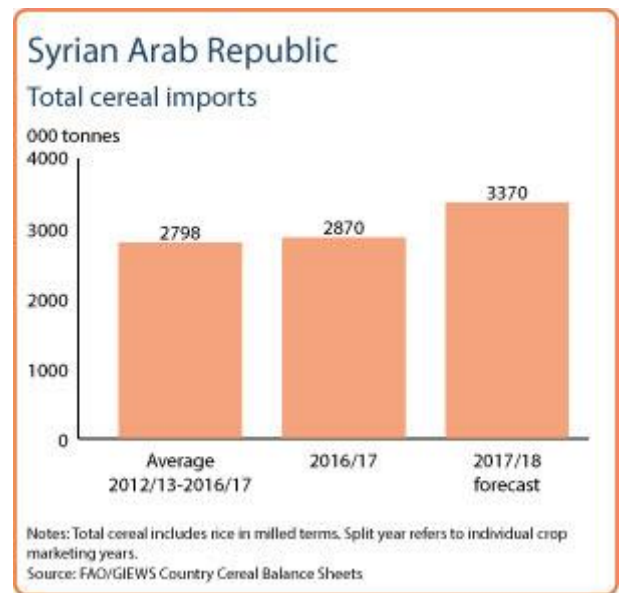
About 6.9 million people are food insecure

The CFSAM estimated that 6.9 million Syrians are food insecure in terms of current consumption. In addition, the situation of 5.6 million Syrians would likely be worse off without the food assistance provided. An additional 3.1 million people are at risk of food insecurity as they are using asset depletion strategies in order to meet their consumption needs and only 3.5 million can currently be considered as food secure.

Syrians have to resort to food coping strategies to cover the severe food shortages they are facing. Some 50 percent of the households have reduced the number of meals and more than 30 percent have restricted the consumption to adults to prioritize children. In the seventh year of the crisis, the large majority of the households have depleted their assets and are no longer able to draw on stocks or other reserves. They resort to child labour or have to withdraw their children from school to cope.

As of late September 2017, over 5.2 million refugees were registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration.

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GIEWS Country Brief The Syrian Arab Republic

Reference Date: 21-July-2017

FOOD SECURITY SNAPSHOT

- Some improvement in 2017 cereal production due to better rains and localized improvements in security, but still less than half of pre-conflict average
- Food security situation severely impacted by prolonged conflict, especially for most vulnerable groups
- About 6.9 million people food insecure

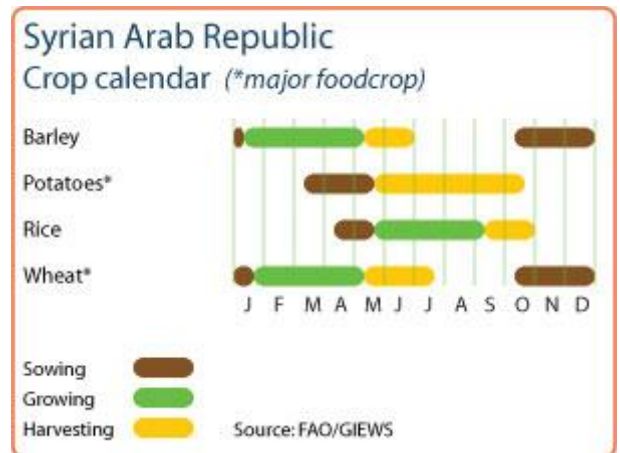
Below-average cereal harvest in 2017

The harvesting of the 2016/17 season winter wheat and barley crops finished in early July. The area planted with cereals in the 2016/17 cropping season did not change significantly compared to the previous period: an estimated 1.17 million hectares were planted with wheat and 1.11 hectares with barley. For comparison in 2011, before the start of the conflict, over 1.5 million hectares were cultivated with wheat and 1.3 million hectares with barley.

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2017. The Mission estimated the 2017 wheat harvest at about 1.8 million tonnes, some 12 percent more than last year's record low harvest, but still much less than half of the pre-conflict average of 4.1 million tonnes (2002-2011). The slight increase in production is attributed to better rainfall and some local improvements in civil security which allowed for a larger share of planted area to be harvested. Being predominantly rainfed and more resilient than wheat, barley production was estimated at 777 000 tonnes, almost 8 percent higher than last year. Barley production varies greatly year to year. Unharvested areas of barley are often grazed by livestock.

The main agricultural constraints facing crop production continue to be high production costs, lack of inputs and damaged or destroyed infrastructure, including irrigation.

Over the past two years, the herd sizes have stabilized albeit at a very low level. The main constraints restricting livestock production continue to be high fodder prices, insufficient coverage of veterinary services and access to grazing areas in parts of the country due to the compromised security situation. Improved pasture conditions, benefiting from higher rainfall, should ease the pressure from high fodder prices, provided that



Syrian Arab Republic
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Wheat	2,230	1,601	1,793	12
Barley	786	722	777	8
Maize	130	130	130	0
Others	8	8	8	0
Total	3,154	2,461	2,708	10

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

the access is possible.

Import requirement to increase in 2017/18 marketing year

The country normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, the cereal import requirement in the current 2017/18 marketing year (July/June) is forecast at 3.4 million tonnes, with an increase of 17 percent compared to the previous year.

Economic prospects still deteriorating

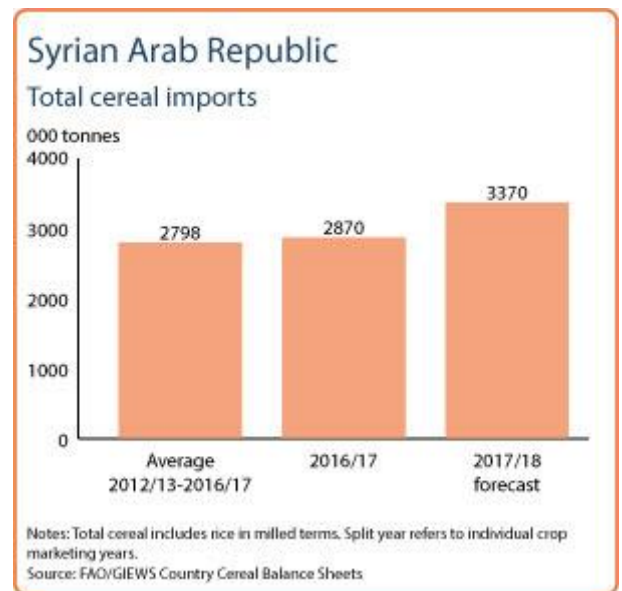
The GDP in 2016 contracted by 3.4 percent, less than the 5.3 percent contraction recorded in 2015. A positive GDP growth of 1.8 percent is forecast for 2017 as limited reconstruction efforts are likely to begin, hampered by lack of finances. Inflation in 2016 increased to an estimated 43.9 percent, up from 38 percent in 2015, reflecting general shortages and cuts in fuel and some food subsidies. The unemployment rate is estimated at about 50 percent (although precise statistics are missing), up from about 10 percent at the beginning of the conflict. The official exchange rate for the US Dollar (USD) against the Syrian Pound (SYP) was set by the Central Bank of the Syrian Arab Republic in June 2017 at SYP 517 per USD. The official exchange rate has been stabilized since August 2016 at slightly over SYP 500 per USD. In January 2016, USD 1 officially traded for SYP 395.

About 6.9 million food insecure

The CFSAM estimated that 6.9 million Syrians are food insecure in terms of current consumption. In addition, the situation of 5.6 million Syrians would likely be worse off without the food assistance provided. An additional 3.1 million people are at risk of food insecurity as they are using asset depletion strategies in order to meet their consumption needs, and only 3.5 million can currently be considered food secure.

Syrians have to resort to food coping strategies to cover the severe food shortages they are facing. Some 50 percent of the households have reduced the number of meals and more than 30 percent have restricted the consumption to adults to prioritize children. In the seventh year of the crisis, the large majority of the households have depleted their assets and are no longer able to draw on stocks or other reserves. They resort to child labour or have to withdraw their children from and school to cope.

As of early July 2017, almost 5.1 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration.



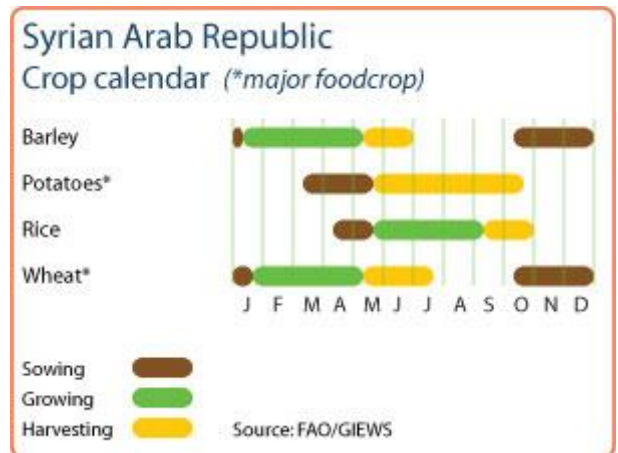


GIEWS Country Brief The Syrian Arab Republic

Reference Date: 15-November-2016

FOOD SECURITY SNAPSHOT

- Below average 2016 cereal harvest as combination of inconsistent precipitation and ongoing conflict
- Food security situation severely impacted by prolonged conflict, especially for most vulnerable groups
- About 9.4 million people require continued food assistance
- Provision of assistance to agricultural sector, including crops and livestock, essential to protect livelihoods and prevent further deterioration of the sector



Timely rain improves soil moisture for early planting of 2017 cereal winter crops

Land preparation and early sowing of the winter wheat and barley crops, for harvest from May 2017, is currently underway. Moderate but timely precipitation in early November 2016 improved soil moisture across the country.

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

Below-average cereal harvest in 2016

The harvesting of the 2015/16 winter wheat and barley crops finished in early July. While weather conditions remained relatively favourable for land preparation and planting, precipitation for the rest of the season was inconsistent across the country. The main growing area of the Hasakeh Governorate in the east of the country, received above average levels of rain. Large patches of crop land in Aleppo, Idlib and Homs governorates were affected by drought.

The area planted with cereals in the 2015/16 cropping season has been the smallest on record: an estimated 900 000 hectares were planted with wheat and 665 000 hectares with barley. For comparison in 2011, before the start of the conflict, over 1.5 million hectares were cultivated with wheat and 1.3 million hectares with barley.

Syrian Arab Republic
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes		percent	
Wheat	2 682	2 445	1 547	-37
Barley	775	968	877	-9
Maize	129	133	130	-2
Others	8	8	8	0
Total	3 593	3 554	2 562	-28

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

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in June 2016. The Mission estimated the 2016 wheat harvest at about 1.5 million tonnes, some 37 percent lower than the relatively favourable harvest of 2015 and approximately 55 percent lower than the pre-conflict average (2007-2011). Being predominantly rainfed and more resilient than wheat, barley production was estimated at 877 000 tonnes, almost 10 percent lower than the record crop of the last year, but about onequarter higher than the pre-conflict average (2007-2011).

The livestock sector, once important in the Syrian Arab Republic's domestic economy and in its external trade, has suffered very substantially since 2011 with reductions in terms of herd and flock numbers of over 30 percent for cattle and over 40 percent for sheep and goats. By contrast, the poultry sector, the main and most affordable source of protein of animal origin, has shrunk by 60 percent mostly due to unavailability of poultry feed at affordable costs. Pasture availability and access have been affected by the lack of precipitation and widespread insecurity. Livestock feed has become increasingly expensive, particularly in the areas with high concentration of internally displaced persons who moved with their herds.

Producers, transporters and traders are facing increasing transaction costs and security risks that, combined with transportation bottlenecks, led to a build-up of cereals and increased wastage of fruits and vegetables in production areas, while urban centres often remain undersupplied.

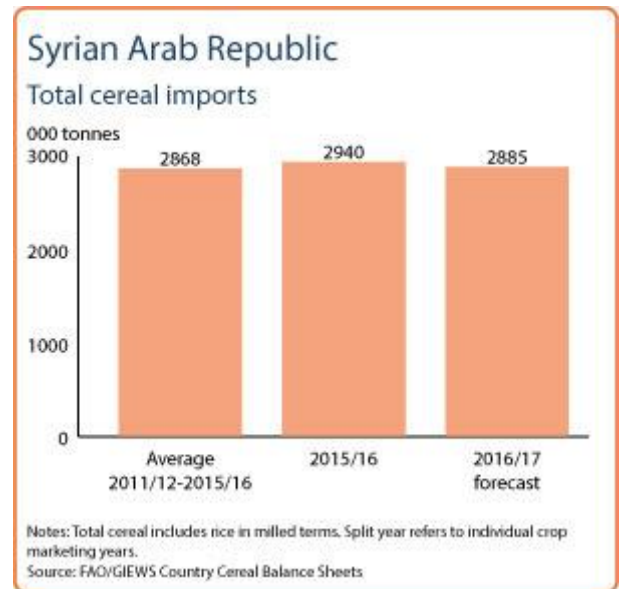
Over the last 12 months, prices of agricultural and livestock products increased. However, the upward pressure of tight supplies was partly offset by the low purchasing power which depressed demand. Consequently, prices of final products increased at slower rates compared to prices of productive inputs which soared due to the economic sanctions, market disruptions and the declining value of the Syrian Pound. As a result, farmers have incurred heavy losses.

Imports in 2016/17 stable compared to previous year but remain below pre-conflict average

The Syrian Arab Republic normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, at 2.9 million tonnes, the cereal import requirement is expected to decrease slightly in the current 2016/17 marketing year (July/June) compared to the previous year. Of this, the wheat import requirement is tentatively forecast at about 1.7 million tonnes. The forecasted cereal import requirement (wheat and barley) is significantly below the pre-conflict level of 3.4 million tonnes (2004-2012 average).

Economic prospects deteriorating

The GDP in 2015 contracted by 5.3 percent and an additional contraction by 3.3 percent is forecast in 2016. Inflation in 2015 surged to about 38 percent reflecting general shortages and cuts in fuel and some food subsidies. The unemployment rate is estimated at about 50 percent (although precise statistics are missing), up from about 10 percent at the beginning of the conflict. The Syrian Pound continued to depreciate in 2016: between January and mid-August, moving from SYP 395 to SYP 530 per USD.



Localized shortages and the weakening currency are likely to put additional upward pressure on inflation resulting in a further deterioration of purchasing power and food security conditions of poor households.

After a sustained increasing trend which started in early 2015, prices of wheat flour declined in several key markets by 12-15 percent in June 2016 due to newly-harvested crops or food assistance airdrops in some besieged areas that increased supplies and also a temporary stabilization of the exchange rate and general inflation. However, wheat prices in June 2016 were still between 40 and 50 percent higher than 12 months earlier. Prices of cattle, sheep, goats and chicken approximately doubled between 2015 and 2016 in the markets located in both Government-controlled and rebel-controlled areas.

About 9.4 million people in need of food assistance

As of June 2016, about 9.4 million Syrians were estimated to be in need of food assistance, up 8 percent from September 2015. The rate of the increase is most notable in Quneitra, Dara'a, Damascus, Idlib and Aleppo governorates, which have experienced new displacement and worsening food access conditions. As of August 2016, food insecurity conditions were especially acute for an estimated 592 000 people living in 18 besieged and hard-to-reach areas, where food supplies are extremely limited and the population largely relies on food assistance.

As of September 2016, almost 4.8 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration.

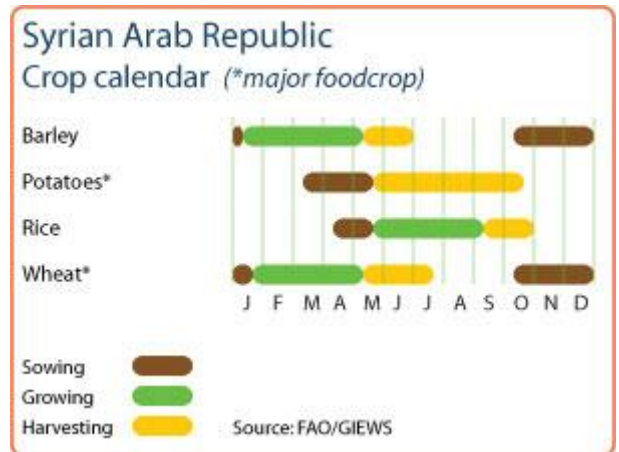


GIEWS Country Brief The Syrian Arab Republic

Reference Date: 05-May-2016

FOOD SECURITY SNAPSHOT

- Ongoing conflict seriously weakens agricultural productive capacity, despite overall favourable weather conditions
- Food security situation severely impacted by prolonged conflict, especially for vulnerable groups
- Millions of people, both internally-displaced and refugees in neighbouring countries, require continued humanitarian assistance
- Assistance to agricultural sector, including crops and livestock, essential to protect livelihoods and prevent further deterioration of the sector



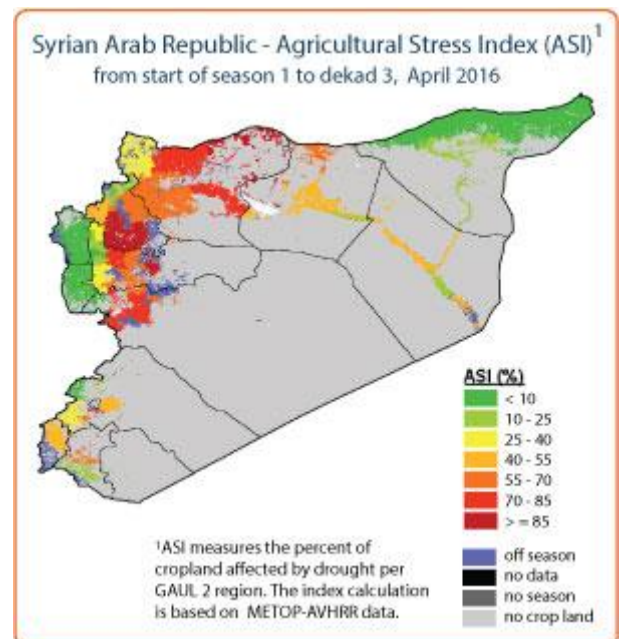
Mixed crop prospects

Planting of the 2016 winter wheat and barley crops for harvest from mid-May 2016 finished in mid-January. Weather conditions remained relatively favourable for land preparation and planting. Data provided by the Syrian Ministry of Agriculture and Agrarian Reform indicate that some 1.03 million hectares (of which 430 000 were irrigated and 600 000 rainfed) were planted by wheat, while 1.13 million hectares (over 95 percent rainfed) were planted by barley. For comparison in 2011, over 1.5 million hectares were cultivated with wheat and 1.3 million hectares with barley.

Precipitation during and following the planting season has been inconsistent across the country. The main growing area of Hassakeh in the east of the country received above average levels of rain and the remotely-sensed NDVI data is suggesting satisfactory crop development. Almost half of the 2016 wheat planted area is in Hassakeh.

Current prospects are less good in Aleppo, Idlib and Homs where the cumulative precipitation is well below average and the NDVI slightly below average. The temperatures have been higher than average, diminishing water moisture. In those provinces, the Agricultural Stress Index is showing that large patches of crop land are currently affected by drought.

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



Below-average cereal harvest in 2015 despite favourable weather conditions

The harvesting of the 2015 winter wheat and barley crops finished in early July. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2015. The Mission estimated the 2015 wheat harvest at 2.445 million tonnes, some 30 percent higher than the very poor harvest of 2014, but approximately 40 percent lower than the pre-conflict average (2002-2011). Being predominantly rainfed, barley production, at 968 000 tonnes, was the highest since 2006 despite the fact that it came from the smallest area during that period.

The livestock sector, once important in the Syrian Arab Republic's domestic economy and in its external trade, has suffered substantially since 2011 with reductions in terms of herd and flock numbers of 30 percent for cattle and 40 percent for sheep and goats, while the poultry stock, the main and most affordable source of protein of animal origin, has shrunk by 50 percent. The veterinary service is running out of vaccines and routine drugs.

Producers, transporters and traders are facing increasing transaction costs and security risks. Those, combined with the transportation bottlenecks, led to a build-up of cereals and increased wastage of fruits and vegetables in the production areas, while urban centres remain undersupplied.

Imports in 2015/16 increasing compared to previous year but remain below pre-conflict average

The Syrian Arab Republic normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, at 3.2 million tonnes, the cereal import requirement is expected to increase slightly in the current 2015/16 marketing year (July/June) compared to the previous year. Of this, the wheat import requirement is tentatively forecast at about 1.7 million tonnes. The forecasted cereal import requirement (wheat and barley) is significantly below the pre-conflict level of 3.4 million tonnes (2004-2012 average).

Price increases of subsidized items resulted in higher inflation

Inflation surged in the first eight months of 2015 (last available information), to over 35 percent, reflecting major cuts in price subsidies for fuel and foodstuffs. In January 2015, the Government introduced price increases for subsidized items. On average, prices 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 (latest information available). Prices of butane gas increased from SYP 1 100 to SYP 1 500 per litre, while the price of 1 litre of diesel for transportation purposes increased from SYP 85 to SYP 125 and for domestic household use from SYP 85 to SYP 140.

Localized shortages and the weakening currency are likely to put additional upward pressure on inflation resulting in a further deterioration of purchasing power and food security conditions of poor households.

Syrian Arab Republic

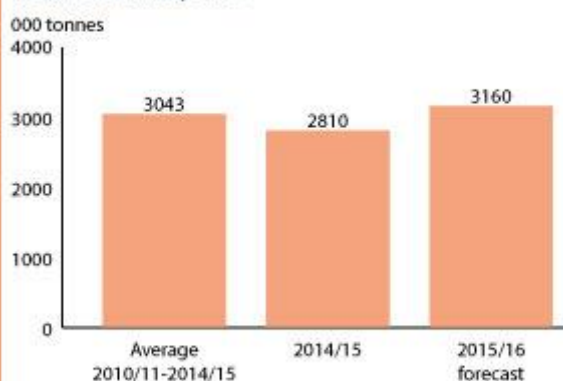
Cereal production

	2010-2014	2014	2015 estimate	change
	average			2015/2014
	000 tonnes			percent
Wheat	2 809	1 865	2 445	31
Barley	747	594	968	63
Maize	129	156	133	-15
Others	8	8	8	0
Total	3 693	2 623	3 554	35

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

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

Overall, unemployment stood at 57 percent as of the fourth quarter of 2014, compared to 10 percent in 2011 and up from 49 percent in the first quarter of 2014. Casual labour markets are reeling in conflict-affected zones.

Overall, households spend 55 percent of their income on food compared to 45-47 percent in 2011 and even less previously. People allocate more than two-thirds of their income to food in Dara'a, Sweida, Aleppo and Hama, where households are prioritizing food purchases over other basic needs.

About 13.5 million people in need of urgent assistance, out of which 8.7 million in need of food security related assistance

In the Syrian Arab Republic, approximately 13.5 million people continue to be in need of urgent humanitarian assistance within the country, including more than 6.5 million people who are internally displaced. Over 1.2 million people have been displaced so far this year, many for the second or third time. Around 4.5 million people reside in areas categorized as hard to reach. Out of the 13.5 million in need of assistance, some 8.7 million are in need of food security assistance.

As of early April 2016, almost 4.8 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration. An average of 6 million people are reached monthly with food assistance (in kind and Cash/Voucher) and 880 000 people are reached with agriculture/livelihood support. Still, one of three people are unable to meet their basic food needs, with an estimated 8.7 million people in need of a range of food security related assistance.

The financial requirement of the food and agriculture sector is estimated at USD 1.2 billion (same as in 2015) to assist 7.5 million people with food-related assistance and 4.3 million people with livelihoods-related assistance. The main proposed livelihoods activities are cereal and legume seeds, vegetable and poultry production, vaccination and treatment of animals.

Reference Date: 14-December-2015

FOOD SECURITY SNAPSHOT

- Ongoing conflict seriously weakens agricultural productive capacity, despite overall favourable weather conditions
- Food security situation severely impacted by prolonged conflict, especially for vulnerable groups
- Millions of people, both internally-displaced and refugees in neighbouring countries, require continued humanitarian assistance
- Assistance to agricultural sector, including crops and livestock, is essential to protect livelihoods and prevent further deterioration of the sector

Planting of 2016 winter wheat and barley crops started in mid-October and will continue until mid-January. Weather conditions remained relatively favourable for land preparation and planting. However, the ongoing conflict and lack of inputs (such as improved seeds, fertilizers and fuel), damage to agricultural machinery, irrigation systems and storage facilities, together with disruptions in electricity supplies, continued to seriously hamper agricultural production.

Below-average cereal harvest in 2015 despite favourable weather conditions

Harvesting of 2015 winter wheat and barley crops finished in early July. A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2015. The Mission estimated the 2015 wheat harvest at 2.445 million tonnes, some 30 percent higher than the very poor harvest of 2014 but approximately 40 percent lower than the pre-conflict average (2002-2011). Being predominantly rainfed, barley production, at 968 000 tonnes, was the highest since 2006 despite the fact that it came from the smallest area during that period.

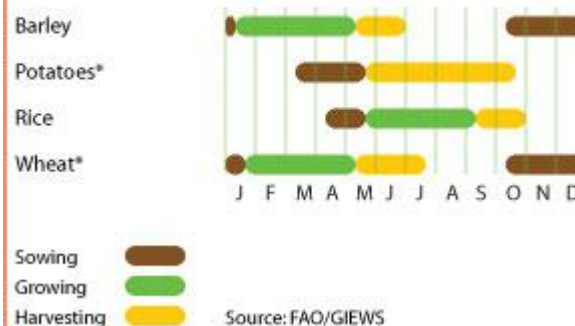
The livestock sector, once important in the Syrian Arab Republic's domestic economy and in its external trade, has suffered substantially since 2011 with reductions in terms of herd and flock numbers of 30 percent for cattle and 40 percent for sheep and goats, while the poultry stock, the main and most affordable source of protein of animal origin, has shrunk by 50 percent. The veterinary service is running out of vaccines and routine drugs.

Producers, transporters and traders are facing increasing transaction costs and security risks. Those, combined with the transportation bottlenecks, led to a build-up of cereals and increased wastage of fruits and vegetables in the production areas, while urban centres remain undersupplied.

Imports in 2015/16 increasing compared to previous year and pre-conflict average

The Syrian Arab Republic normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, at

Syrian Arab Republic Crop calendar (*major foodcrop)

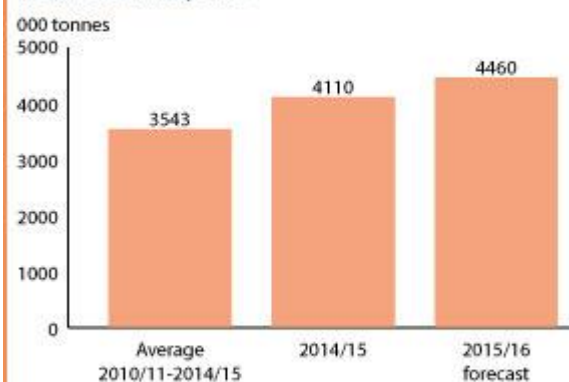


Syrian Arab Republic Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	2 809	1 865	2 445	31
Barley	747	594	968	63
Maize	129	156	133	-15
Others	8	8	8	0
Total	3 693	2 623	3 554	35

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

4.46 million tonnes, the cereal import requirement is expected to increase slightly in the current 2015/16 marketing year (July/June) compared to the previous year. Of this, the wheat import requirement is tentatively forecast at about 1.7 million tonnes. However, the forecasted cereal import requirement (wheat and barley) is significantly above the pre-conflict level of 3.4 million tonnes (2004-2012 average).

Price increases of subsidized items resulted in higher inflation

Inflation surged in the first five months of 2015, to over 30 percent, reflecting major cuts in price subsidies for fuel and foodstuffs. In January 2015, the Government introduced price increases for subsidized items. On average, prices 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. Prices of butane gas increased from SYP 1 100 to SYP 1 500 per litre, while the price of 1 litre of diesel for transportation purposes increased from SYP 85 to SYP 125 and for domestic household use from SYP 85 to SYP 140.

Localized shortages and the weakening currency are likely to put additional upward pressure on inflation resulting in a further deterioration of purchasing power and food security conditions of poor households.

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

Overall unemployment stood at 57 percent as of the fourth quarter of 2014, compared to 10 percent in 2011 and up from 49 percent in the first quarter of 2014. Casual labour markets are reeling in conflict-affected zones.

Overall, households spend 55 percent of their income on food compared to 45-47 percent in 2011 and even less previously. People allocate more than two-thirds of their income to food in Dara'a, Sweida, Aleppo and Hama, where households are prioritizing food purchases over other basic needs.

About 13.5 million people in need of urgent assistance, out of which 8.7 million in need of food security related assistance

In the Syrian Arab Republic, approximately 13.5 million people continue to be in need of urgent humanitarian assistance within the country, including more than 6.5 million people who are internally displaced. Over 1.2 million people have been displaced so far this year, many for the second or third time. Around 4.5 million people reside in areas categorized as hard-to-reach. Out of the 13.5 million in need of assistance, some 8.7 million are in need of food security assistance.

As of mid-November 2015, almost 4.2 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. In addition, a large share of the population lives abroad without seeking refugee registration. An average of 6 million people are reached monthly with food assistance (in kind and

Cash/Voucher) and 880 000 people are reached with agriculture/livelihood support. Still, one in three people are unable to meet their basic food needs, with an estimated 8.7 million people in need of a range of food security related assistance.

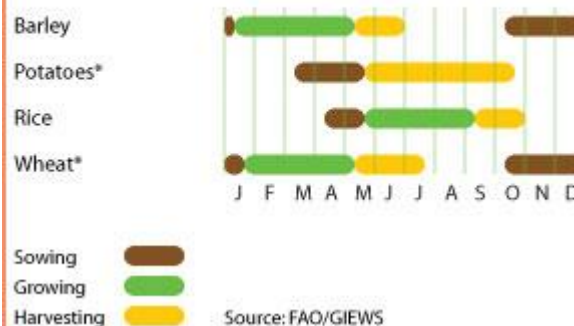
The financial requirement food and agriculture sector is estimated at USD 1.2 billion (same as in 2015) to assist 7.5 million people with food-related assistance and 4.3 million people with livelihoods-related assistance. The main proposed livelihoods activities are cereal and legume seeds, vegetable and poultry production, vaccination and treatment of animals.

Reference Date: 30-July-2015

FOOD SECURITY SNAPSHOT

- Ongoing conflict seriously weakens agricultural productive capacity, despite overall favourable weather conditions
- Food security situation severely impacted by prolonged conflict, especially for vulnerable groups
- Millions of people, both internally-displaced and refugees in neighbouring countries, require continued humanitarian assistance
- Assistance to agricultural sector, including crops and livestock, is essential to protect livelihoods and prevent further deterioration of the sector

Syrian Arab Republic Crop calendar (*major foodcrop)



Below-average cereal harvest in 2015 despite favourable weather conditions

Harvesting of 2015 winter wheat and barley crops finished in early July. Weather conditions during the 2015 cropping season were generally favourable, with timely and sufficient rains. However, the ongoing conflict and lack of inputs (such as improved seeds, fertilizers and fuel), damage to agricultural machinery, irrigation systems and storage facilities, together with disruptions in electricity supplies, continued to seriously hamper agricultural production. Insecurity also limited plantings, with the 2015 wheat planted area the smallest since the 1960s.

A joint FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2015. The Mission estimated the 2015 wheat harvest at 2.445 million tonnes, some 30 percent higher than the very poor harvest of 2014 but approximately 40 percent lower than the pre-conflict average (2002-2011). Being predominantly rainfed, barley production, at 968 000 tonnes, was the highest since 2006 despite the fact that it came from the smallest area during that period.

The livestock sector, once important in the Syrian Arab Republic's domestic economy and in its external trade, has suffered substantially since 2011 with reductions in terms of herd and flock numbers of 30 percent for cattle and 40 percent for sheep and goats, while the poultry stock, the main and most affordable source of protein of animal origin, has shrunk by 50 percent. Conditions of the remaining livestock were deemed relatively good at the time of the Mission but were expected to deteriorate with the drying up of pastures from the end of June. In addition, the veterinary service is running out of vaccines and routine drugs.

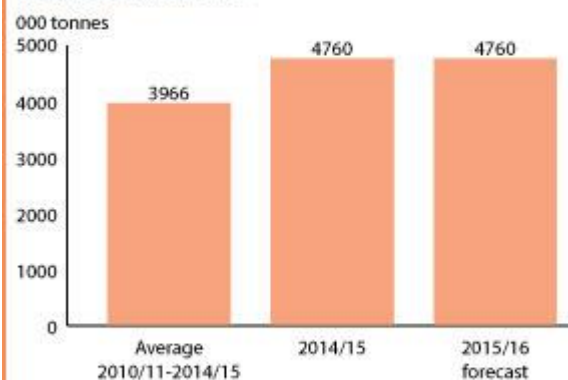
Producers, transporters and traders are facing increasing transaction costs and security risks. Those, combined with the transportation bottlenecks, led to a build-up of cereals and increased wastage of fruits and vegetables in the production areas, while urban centres remain undersupplied.

Syrian Arab Republic Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
Wheat	2,809	1,865	2,445	31
Barley	747	594	968	63
Maize	129	156	133	-15
Others	8	8	8	0
Total	3,693	2,623	3,554	35

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

Imports in 2015/16 stable compared to previous year but above pre-conflict average

The Syrian Arab Republic normally relies heavily on food imports, amounting to almost half of the total domestic utilization. Overall, at 4.76 million tonnes, the cereal import requirement is expected to remain stable in the current 2015/16 marketing year (July/June) compared to the previous year. Of this, the wheat import requirement is tentatively forecast at about 2 million tonnes. However, the forecasted cereal import requirement (wheat and barley) is significantly above the pre-conflict level of 3.4 million tonnes (2004-2012 average).

Price increases of subsidized items likely to result in higher inflation

In January 2015, the Government introduced price increases for subsidized items. On average, prices 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. Prices of butane gas increased from SYP 1 100 to SYP 1 500 per litre, while the price of 1 litre of diesel for transportation purposes increased from SYP 85 to SYP 125 and for domestic household use from SYP 85 to SYP 140.

Reports also indicate that in an effort to reduce the cost of the bread subsidy programme, the Government changed the extraction rate of flour used in bread, introducing more bran. In an effort to mitigate the impact of the higher food 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, the reduction in fuel and bread subsidies, combined with localized shortages and the weakening currency, are likely to put upward pressure on inflation resulting in a further deterioration of purchasing power and food security conditions of poor households.

Overall unemployment stood at 57 percent as of the fourth quarter of 2014, compared to 10 percent in 2011 and up from 49 percent in the first quarter of 2014. Casual labour markets are reeling in conflict-affected zones.

Overall, households spend 55 percent of their income on food compared to 45-47 percent in 2011 and even less previously. People allocate more than two-thirds of their income to food in Dara'a, Sweida, Aleppo and Hama, where households are prioritizing food purchases over other basic needs.

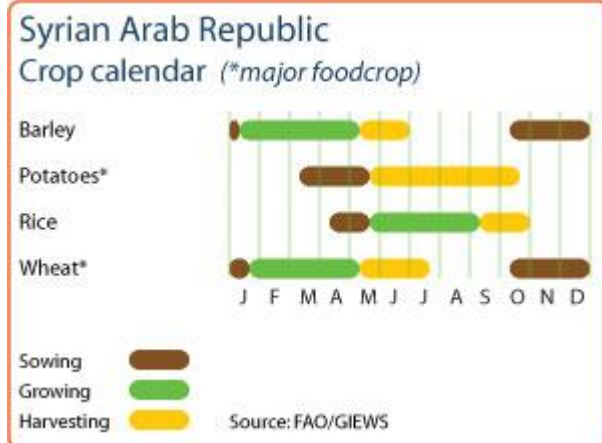
About 4 million refugees registered in the region

As of late July 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 has been scaled-up to reach 4.5 million by December 2015, up from 4.25 million in 2014. WFP assistance in neighbouring countries is targeting 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.

Reference Date: 17-June-2015

FOOD SECURITY SNAPSHOT

- Ongoing conflict seriously compromises agricultural production, despite overall favourable weather conditions
- Country's food security situation is severely impacted by prolonged conflict, especially for vulnerable groups
- Millions of people, both internally-displaced and refugees in neighbouring countries require continued humanitarian assistance
- Assistance to agricultural sector, including crops and livestock, is essential to protect livelihoods and prevent further deterioration of the sector



Favourable weather conditions for the 2015 cereal crop

Harvesting of 2015 winter wheat and barley crops is currently underway. Weather conditions during the 2015 crop season were generally favourable, with timely and sufficient moisture.

However, 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.

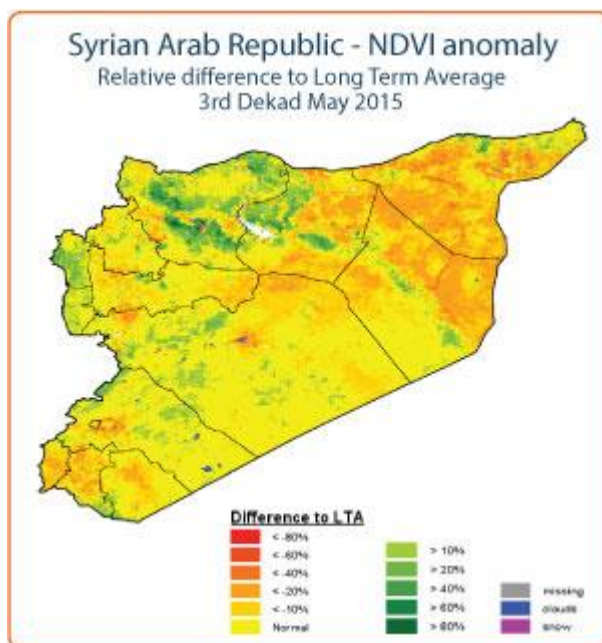
An FAO/WFP Crop and Food Security Assessment Mission (CFSAM) was conducted in May 2015, with findings anticipated to be issued in July 2015.

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.



Syrian Arab Republic

Cereal production

	2009-2013 average	2013	2014 estimate	change 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

Price increases of subsidized items likely to increase inflation

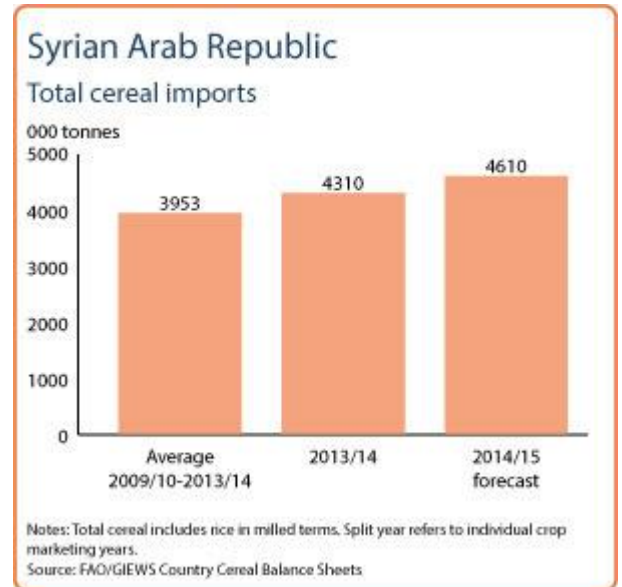
In January 2015, the Government introduced price increases for subsidized items. Price of bread increased by 40 percent, with a package of slightly over 1 kg selling for SYP 35 (USD 0.16 as of late March 2015). Price of butane gas increased from SYP 1 100 to SYP 1 500, 1 litre of diesel for transportation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



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.

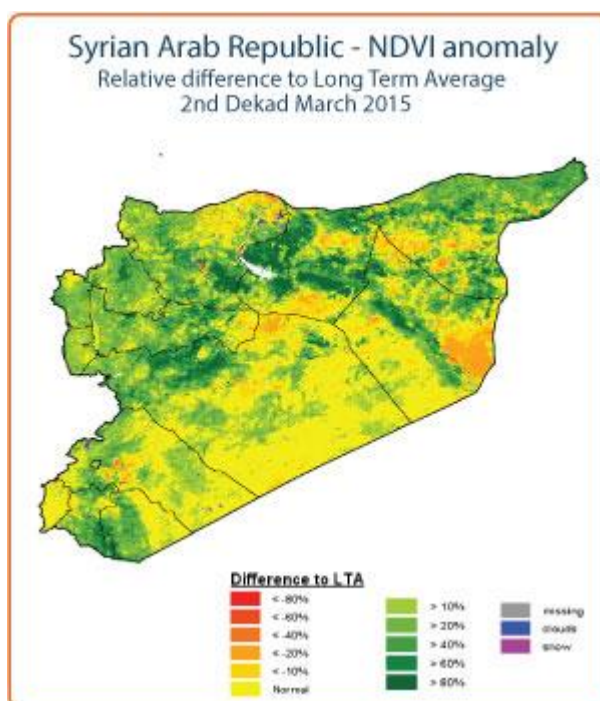
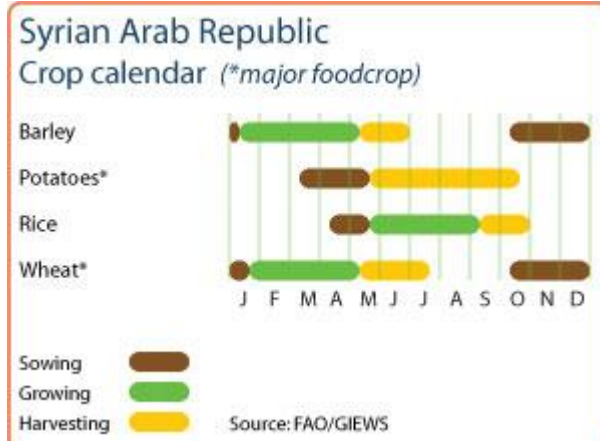
The vegetation response captured by the satellite-based Normalized Difference Vegetation Index (NDVI) suggests a good vegetation condition.

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

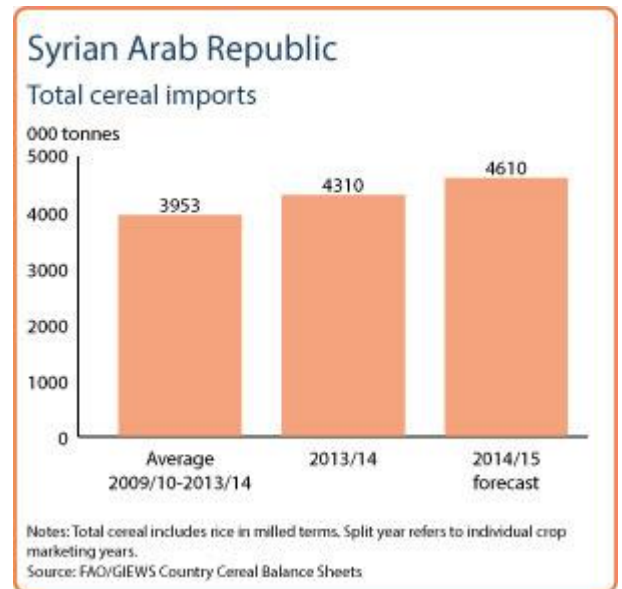
In January 2015, the Government introduced price increases for subsidized items. Price of bread increased by 40 percent, with a package of slightly over 1 kg selling for SYP 35 (USD 0.16 as of late March 2015). Price of butane gas increased from SYP 1 100 to SYP 1 500, 1 litre of diesel for transportation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



Reference Date: 26-January-2015

FOOD SECURITY SNAPSHOT

- Despite overall favourable weather conditions, sowing of 2015 crops, nearing completion, is affected by ongoing conflict
- Below-average cereal production estimated in 2014 due to impact of conflict and drought conditions
- Prolonged conflict has severely impacted on country's food security situation especially for vulnerable groups

Planting of 2015 crop almost completed

Planting of 2015 winter wheat and barley crops, to be harvested from May 2015, is nearing completion. The long period of rains during the sowing stage established abundant moisture for seed establishment but delayed planting in some areas. The vegetation response captured by the Normalized Difference Vegetation Index using satellite images suggests a good establishment of the winter crops.

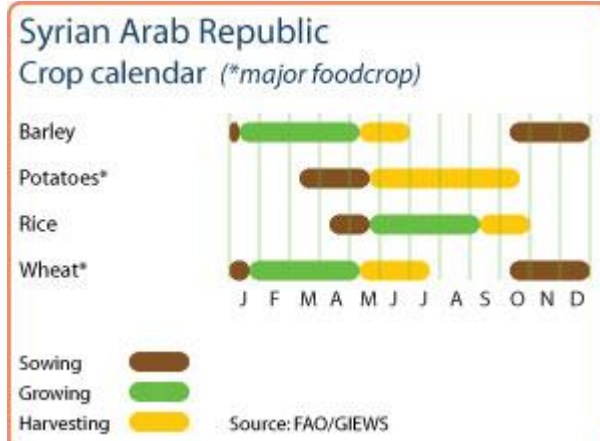
The ongoing conflict and lack of inputs is seriously hampering agricultural activities. For 2014/15, the Government funds seed distribution only to farmers who had paid back at least 5 percent of their previous debt. By the start of the season, the General Organization for Seed Multiplication (GOSM) had distributed about 12 percent of the country's requirements, at 60-70 percent of cost price. The fertilizer factory (in Homs) remains operational but only at a fraction of its capacity.

Well below-average cereal production estimated in 2014

Harvesting of 2014 winter grains was completed in July. Reduced plantings and drought conditions in some parts of the country have negatively impacted yields and overall production. Rainfall during the 2013/14 cropping season was particularly poor in terms of both quantity and distribution. According to the meteorological information reported from the governorates through MAAR, until 21 April 2014 the country had received, on average, only 44 percent of the rainfall that had been received in the same period in 2012/13, and rainfall in the 2013/14 main cropping season amounted to only 51 percent of the annual average. The Ministry of Water Resources (MWR) estimates that irrigated wheat received only 65-70 percent of its recommended amount of irrigation water.

The ongoing conflict compounded the problem by limiting farmers' movements; though damage to agricultural machinery, irrigation systems and storage facilities; through disruption of electricity supplies; and by limiting access to inputs such as improved seeds and fuel.

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.

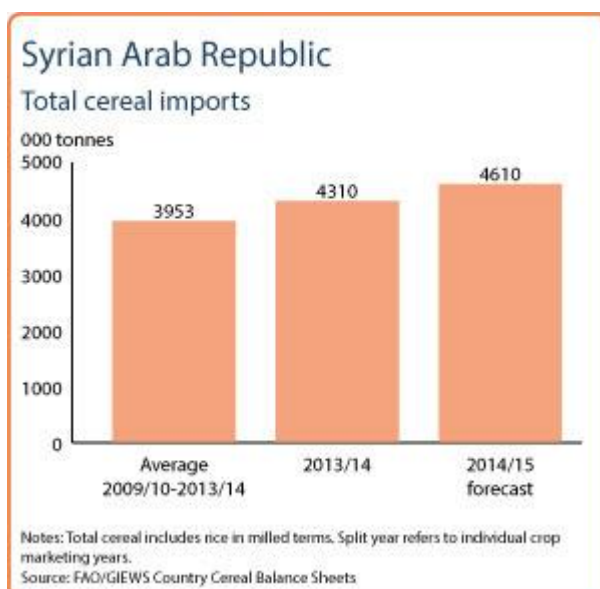


Syrian Arab Republic

Cereal production

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	000 tonnes		percent	
Wheat	3 177	2 400	1 865	-22
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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



The drought in 2014 triggered the Government's compensation scheme for farmers affected by natural disasters. Complete loss of crop entitles a farmer to 10 percent of the cost of production while 50 percent loss entitles him or her to 5 percent of production costs. For the 2013/14 cropping season, the Government paid out SYP 250 million in compensation, in cash, to 18 000 farmers.

Out of the 140 grain collection centres that would purchase grain from farmers, only 31 remain under Government control. Likewise, out of 32 large siloes and 99 small ones previously at Government's disposal, only 14 and 32, respectively, remain under its control. The rest have been seized by opposition forces, damaged or destroyed. The 14 large siloes have a total capacity of 1.4 million tonnes, while the smaller ones have a total capacity of 296 400 tonnes. The Government's capacity to store grain has been reduced by 55 percent in respect of large siloes, and by 76 percent in respect of small siloes. Total Government purchases in 2014 reached slightly over 500 000 tonnes, about half of the amount purchased in 2013. There are indications that some production was sold cross-border to Iraq to take advantage of better prices.

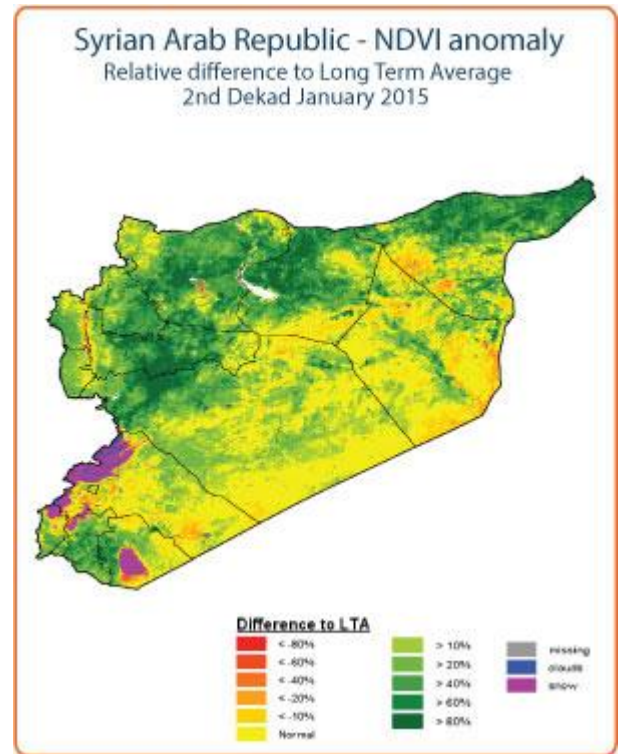
Elsewhere, livestock populations in 2014 are reported to have stabilized at approximately 50 percent of their pre-conflict levels.

Cereal import requirement expected to increase in 2014/15 marketing year (July/June)

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 subsequent 2014/15 market year to 4.6 million tonnes compared to the previous year's 4.3 million tonnes. Of this, the wheat import requirement in 2014/15 (July/June) is tentatively forecast at about 2 million tonnes.

Refugees registered in region total about 3.7 million

As of mid-January 2015, about 3.7 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.



Reference Date: 22-December-2014

FOOD SECURITY SNAPSHOT

- Despite overall favourable weather conditions, sowing of 2015 crops, currently underway, is affected by ongoing conflict
- Below-average cereal production estimated in 2014 due to impact of conflict and drought conditions
- Prolonged conflict has severely impacted on country's food security situation especially for vulnerable groups

Planting of 2015 winter wheat and barley crops, to be harvested from May 2014, is currently ongoing. Despite favourable weather conditions, the ongoing conflict and lack of inputs is seriously hampering agricultural activities.

Well below-average cereal production estimated in 2014

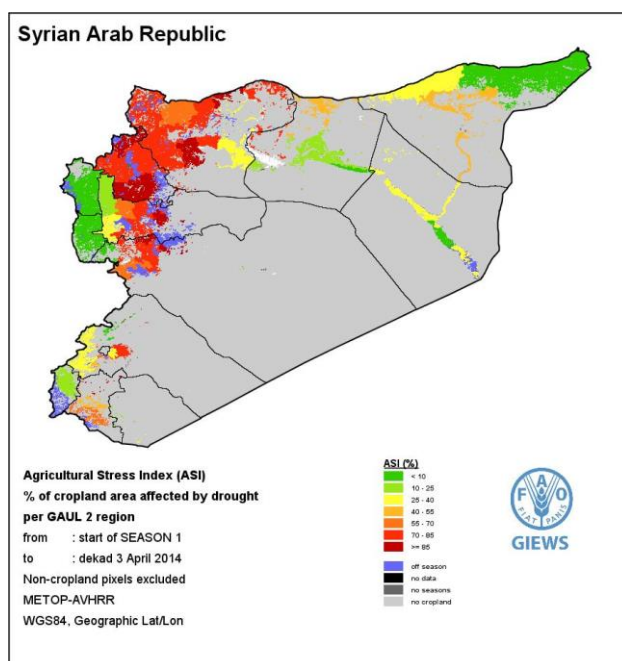
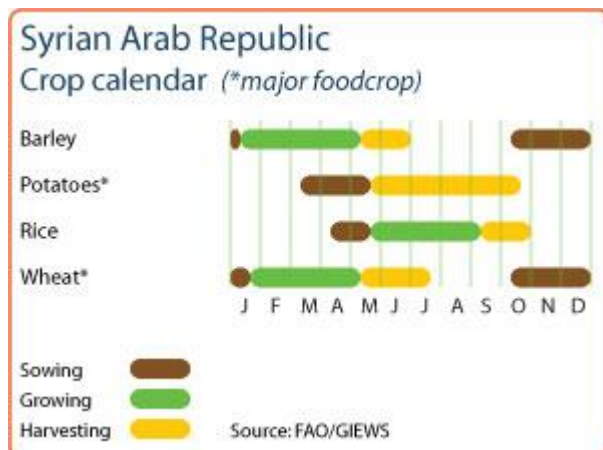
Harvesting of 2014 winter grains was completed in July. Reduced plantings and drought conditions in some parts of the country have negatively impacted yields and overall production. Estimates by the Ministry of Agriculture and Agrarian Reform (MAAR) put the actual wheat and barley plantings about 23 and 19 percent lower, respectively, than the intended level of planting at the start of the season. In addition, the area actually harvested was reduced further in many areas. Rainfall during the 2013-14 cropping season was particularly poor in terms of both quantity and distribution. According to the meteorological information reported from the governorates through MAAR, until 21 April 2014 the country had received, on average, only 44 percent of the rainfall that had been received in the same period in 2012/13, and rainfall in the 2013/14 main cropping season amounted to only 51 percent of the annual average. Remote sensing analysis confirms the unfavourable crop growing conditions which prevailed during the 2013/14 cropping season (see ASI map).

The ongoing conflict compounded the problem by limiting the farmers' movements; though damage to agricultural machinery, irrigation systems and storage facilities; through disruption of electricity supplies; and by limiting access to inputs such as improved seeds and fuel.

The Syrian Ministry of Agriculture and Agrarian Reform (MAAR) estimated the 2014 wheat production at 1.865 million tonnes, 40 percent less than in 2013 and the lowest level of wheat production for 25 years.

Cereal import requirement expected to increase in 2014/15 marketing year (July/June)

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 subsequent 2014/15 market year to 4.6 million tonnes compared to this year's projected 4.3 million tonnes. Of this, the wheat import requirement in



Syrian Arab Republic

Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	3 177	2 400	1 915	-20
Barley	797	993	594	-40
Maize	134	80	156	+95
Others	8	8	8	0
Total	4 116	3 481	26 73	-23

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

2014/15 (July/June) is tentatively forecast at about 2 million tonnes.

3.2 million refugees registered in region

As of early December 2014, about 3.2 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain. The WFP assistance in neighbouring countries is scaled to reach more than 2.5 million beneficiaries by December 2014, up from 795 000 in June 2013.

Reference Date: 29-August-2014

- Below-average cereal production estimated in 2014 due to the impact of conflict and drought conditions
- The prolonged conflict has severely impacted on the country's food security situation especially for vulnerable groups

Well below-average cereal production estimated in 2014

Harvesting of 2014 winter grains is completed. Reduced plantings and drought conditions in some parts of the country have negatively impacted yields and overall production. Estimates put the actual plantings about 21 percent lower than the intended level planned at the start of the season. Several factors, including high costs of production, reduced input availability including labour, prevailing violence, related damage to farm equipment, abandoned land, power cuts, damage to power stations, canals and pumps, and high diesel costs, as well as dry conditions at the time of planting have contributed to the decline in production.

FAO estimates puts the cereal harvest at about 2.4 million tonnes consisting of about 2 million tonnes of wheat and 400 000 tonnes of barley and other cereals. The Syrian Ministry of Agriculture and Agrarian Reform (MAAR) estimated the aggregate wheat production at 2.95 million tonnes, with approximately 2.3 million tonnes from the irrigated sector and 0.63 million tonnes from rainfed crops.

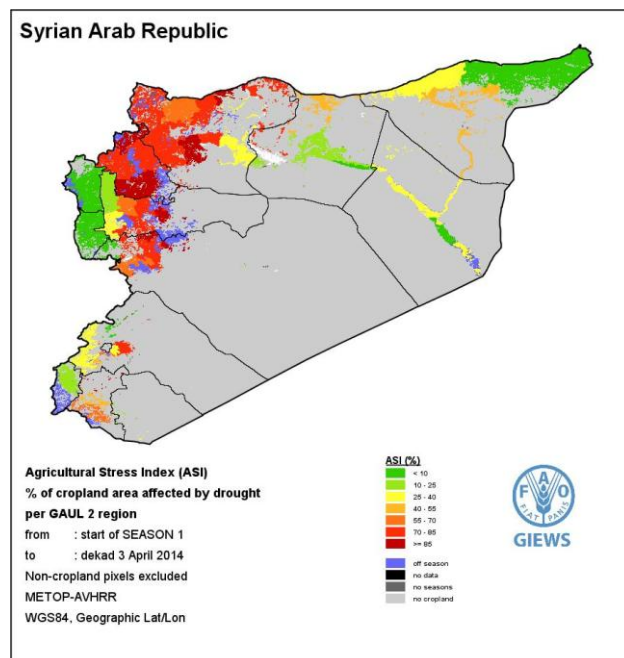
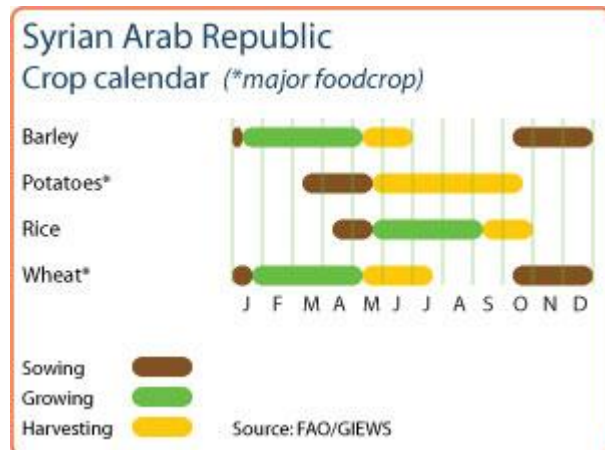
According to the local press, as of end of July 2014 the General Organisation for Cereal Trade and Processing domestically procured 500 000 tonnes of wheat and 120 000 tonnes of barley. The amount procured compares with an average of 2.8 million tonnes of wheat between the years of 2002 and 2012. In 2008 when wheat production, at 2.1 million tonnes was at its lowest, domestic procurement amounted to 1.2 million tonnes.

Cereal import requirement expected to increase in the 2014/15 marketing year (July/June)

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 subsequent 2014/15 market year to 4.53 million tonnes compared to this year's projected 4 million tonnes. Of this, the wheat import requirement in 2014/15 (July/June) is tentatively forecast at about 2 million tonnes. Recorded commercial exports of cereals to the Syrian Arab Republic between July 2013 and February 2014 (last data available) reached approximately 1.3 million tonnes, of which around 890 000 was wheat.

3 million refugees registered in the region

As of late August 2014, almost 3 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities

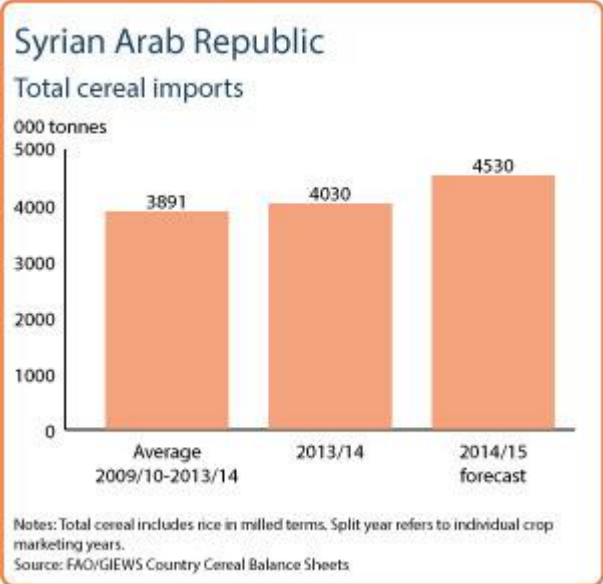


Syrian Arab Republic
Cereal production

	2009-2013	2013	2014	change
	average			
	000 tonnes			percent
Wheat	3 177	2 400	1 969	-18
Barley	797	993	346	-65
Maize	134	80	80	0
Others	8	8	8	0
Total	4 116	3 481	2 403	-31

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

remain under strain. The WFP assistance in neighbouring countries is scaled to reach more than 2.5 million beneficiaries by December 2014, up from 795 000 in June 2013.



Reference Date: 28-January-2014

FOOD SECURITY SNAPSHOT

- Current estimates indicate well below-average cereal harvest in 2013 following escalation of conflict
- Growing concern over the impact of prolonged conflict on the food security situation, especially of vulnerable groups
- Food inflation continues to escalate
- 4 million people facing food insecurity

Planting of winter wheat and barley to be harvested from May 2014 is completed. However, ongoing conflict and lack of inputs hampers agricultural production.

Below average wheat harvest in 2013

Despite favorable seasonal rainfall in 2012/13, the 2013 wheat production was estimated at 2.4 million tonnes; significantly lower than the average for the ten years prior to 2010/11 that exceeded 4 million tonnes (a 40 percent decline) and 15 percent below the poor 2011/12 crop. The barley crop, which is predominantly rainfed, was expected to be close to 1 million tonnes, above the average annual production of 773 000 tonnes for the ten years prior to 2010/11. Less area was planted to cereals due to high costs of production, reduced input availability including labour, prevailing violence, related damage to farm equipment, and abandoned land. Power cuts, damage to power stations, canals, and pumps; and high diesel costs contributed to a decline of the area under irrigated cereal production. Pre- and post-harvest grain losses are higher than average this year, due mostly to damage to harvesting equipment and storage structures.

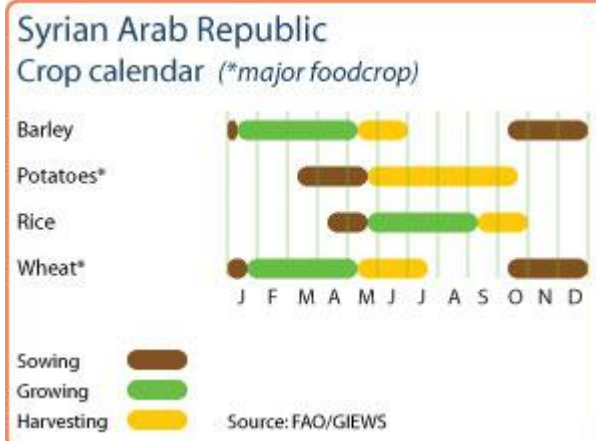
Likewise, the livestock sector has been seriously depleted by the ongoing conflict. Poultry production is estimated to be down by more than 50 percent compared with 2011, and sheep and cattle numbers are down approximately 35 percent and 25 percent, respectively. Vaccines are in short supply and sanctions prohibit imports. Due to higher prices, more Syrian livestock are being sold in Jordan, Lebanon, Turkey and Iraq. With the virtual loss of veterinary services within Syria, livestock diseases are being transmitted to neighbouring countries, thereby posing a potentially serious regional animal-health problem.

Cereal import requirements expected to increase in current 2013/14 marketing year

The Syrian Arab Republic normally relies heavily on food imports amounting to almost half of the total domestic utilization. Overall cereal import requirement is expected to increase compared to the previous year. The wheat import requirement in 2013/14 (July/June) is estimated at about 1.47 million tonnes of which 1 million tonnes are anticipated to be imported commercially.

Food prices rise with the level of inflation soaring to record levels since end-2011

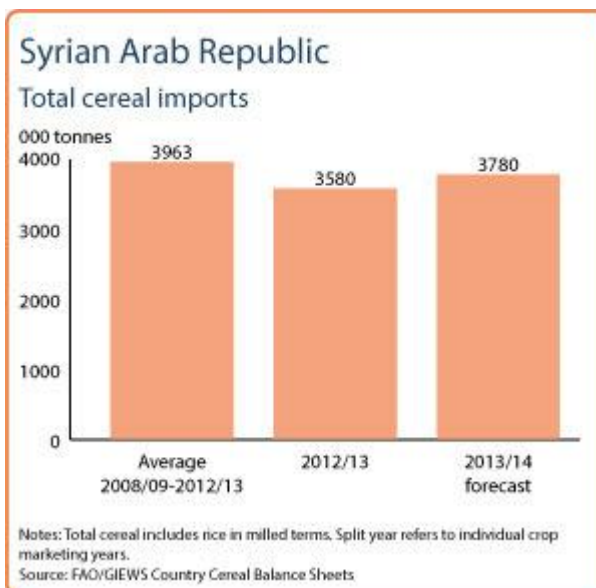
According to data from the Syrian Central Bureau of Statistics, the country's year-on-year inflation rate stood at almost 50 percent in November 2012 (last month for which data are available), mainly driven



Syrian Arab Republic Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Wheat	3 115	2 800	2 400	-14
Barley	666	843	993	18
Maize	174	150	80	-47
Others	7	8	8	0
Total	3 962	3 801	3 481	-8

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



by sharp increases in food prices and by fuel shortages that are impacting on transportation costs. Prices of bread and cereals, major staples in the local diet increased sharply with a year-on-year inflation rate of about 64 percent in November 2012.

Since the beginning of the conflict, prices of the main food commodities have increased substantially both in nominal and in real terms. Average monthly prices of wheat flour in local currency have more than doubled since 2011 in several locations. Rice and vegetable oil prices have almost doubled whereas sugar prices are almost 65 percent higher than in 2011. When controlling for inflation due to the depreciation of the SYP, food commodity price increases remain high. In USD term, wheat flour price is now almost double its 2011 level, and vegetable oil and rice prices are about 25 percent higher.

The total unemployment rate in the Syrian Arab Republic in 2013 has increased to 18 percent; more than twice the seven-year average (2003-2010) of 8 percent. High unemployment levels coupled with high inflation rates seriously impacted the purchasing power of the population.

Civil unrest aggravates food insecurity

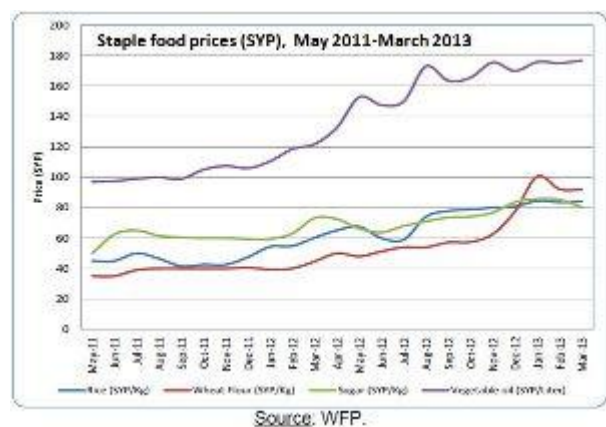
Continued civil unrest since mid-March 2011 has raised serious concern over the state of food security, particularly for vulnerable groups. Following the unrest, the economy contracted by 3.4 percent in 2011 and 19 percent in 2012. For 2013 external sources expected a contraction of over 13 percent. The economy also under pressure from international sanctions which include an embargo on oil exports as well as restrictions on international trade, investment and financial transactions.

The Government's fiscal capacity to support producer and consumer subsidy schemes has come under severe strain following the economic downturn and the international sanctions.

2.4 million refugees registered in the region

The FAO/WFP Crop and Food Security Assessment Mission (CFSAM) conducted between May and June 2013 estimated that approximately 4 million people are facing food insecurity. Most vulnerable groups include the internally displaced, small scale farmers, and herders; casual labourers, petty traders, the urban poor, children, pregnant and lactating mothers, the elderly, the disabled and the chronically sick.

As of January 2014, almost 2.4 million refugees are registered in the region covering Egypt, Iraq, Jordan, Lebanon and Turkey. Although WFP continues to provide food assistance to vulnerable Syrian populations in the region, resources in host communities remain under strain. The WFP assistance in neighbouring countries is scaled to reach more than 2.5 million beneficiaries by December 2014, up from 795 000 in June 2013.



Reference Date: 12-July-2013

FOOD SECURITY SNAPSHOT

- Current estimates indicate well below-average cereal harvest in 2013 following escalation of conflict
- Growing concern over the impact of prolonged conflict on the food security situation, especially of vulnerable groups
- Food inflation escalates since end of 2011
- 4 million people facing food insecurity

Below average wheat harvest in 2013

Despite favorable seasonal rainfall in 2012/13, the 2013 wheat production is estimated at 2.4 million tonnes, significantly lower than the average for the ten years prior to 2010/11 that exceeded 4 million tonnes (a 40 percent decline) and 15 percent below the poor 2011/12 crop. The barley crop, which is predominantly rainfed, is expected to be close to 1 million tonnes, above the average annual production of 773 000 tonnes for the ten years prior to 2010/11. Less area was planted to cereals due to high costs of production, reduced input availability including labour, prevailing violence, related damage to farm equipment, and abandoned land. Power cuts, damage to power stations, canals, and pumps; and high diesel costs contributed to a decline of the area under irrigated cereal production. Pre- and post-harvest grain losses are higher than average this year, due mostly to damage to harvesting equipment and storage structures.

Likewise, the livestock sector has been seriously depleted by the ongoing conflict. Poultry production is estimated to be down by more than 50 percent compared with 2011, and sheep and cattle numbers are down approximately 35 percent and 25 percent, respectively. Vaccines are in short supply and sanctions prohibit imports. Due to higher prices, more Syrian livestock are being sold in Jordan, Lebanon, Turkey and Iraq. With the virtual loss of veterinary services within Syria, livestock diseases are being transmitted to neighbouring countries, thereby posing a potentially serious regional animal-health problem.

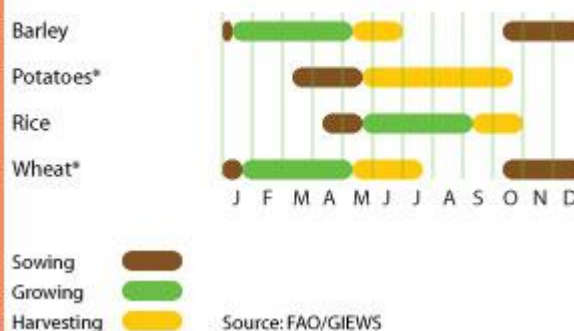
Cereal import requirements expected to increase in current 2013/14 marketing year

The Syrian Arab Republic normally relies heavily on food imports amounting to almost half of the total domestic utilization. Overall cereal import requirement is expected to increase slightly (5 percent) compared to last year. The wheat import requirement in 2013/14 (July/June) is estimated at about 1.47 million tonnes of which 1 million tonnes are anticipated to be imported commercially. An estimated 378 000 tonnes of wheat is planned to assist the most affected people from mid-2013 to mid-2014, still leaving a gap of 99 000 tonnes.

Food prices rise with the level of inflation soaring to record levels since end-2011

According to data from the Syrian Central Bureau of Statistics, the country's year-on-year inflation rate stood at almost 50 percent in November 2012 (last month for which data are available), mainly driven by sharp increases in food prices and by fuel shortages that are impacting on transportation costs. Prices of bread and cereals, major

Syrian Arab Republic Crop calendar (*major foodcrop)

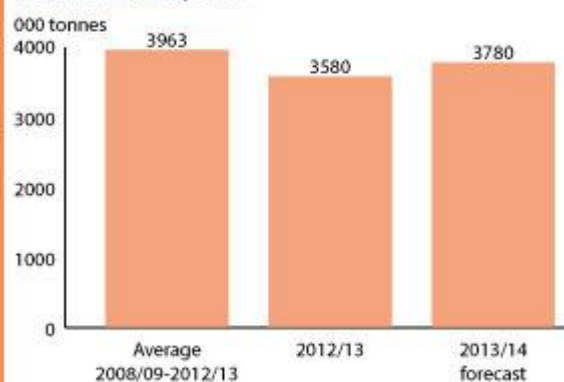


Syrian Arab Republic Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Wheat	3 115	2 800	2 400	-14
Barley	666	843	993	18
Maize	174	150	80	-47
Others	7	8	8	0
Total	3 962	3 801	3 481	-8

Notes: 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

staples in the local diet increased sharply with a year-on-year inflation rate of about 64 percent in November 2012.

Since the beginning of the conflict, prices of the main food commodities have increased substantially both in nominal and in real terms. Average monthly prices of wheat flour in local currency have more than doubled since 2011 in several locations. Rice and vegetable oil prices have almost doubled whereas sugar prices are almost 65 percent higher than in 2011. When controlling for inflation due to the depreciation of the SYP, food commodity price increases remain high. In USD term, wheat flour price is now almost double its 2011 level, and vegetable oil and rice prices are about 25 percent higher.

The total unemployment rate in the Syrian Arab Republic in 2013 has increased to 18 percent; more than twice the seven-year average (2003-2010) of 8 percent. High unemployment levels coupled with high inflation rates seriously impacted the purchasing power of the population.

Civil unrest aggravates food insecurity

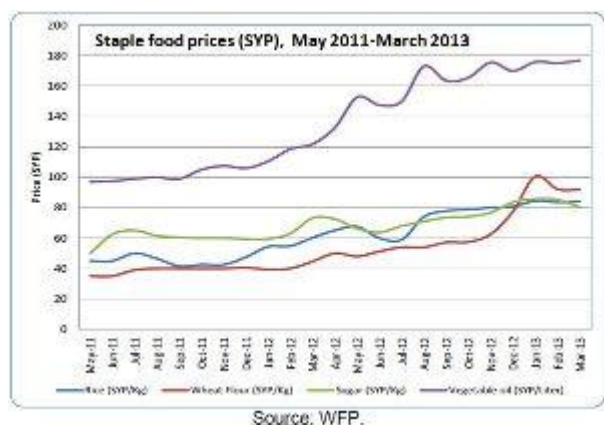
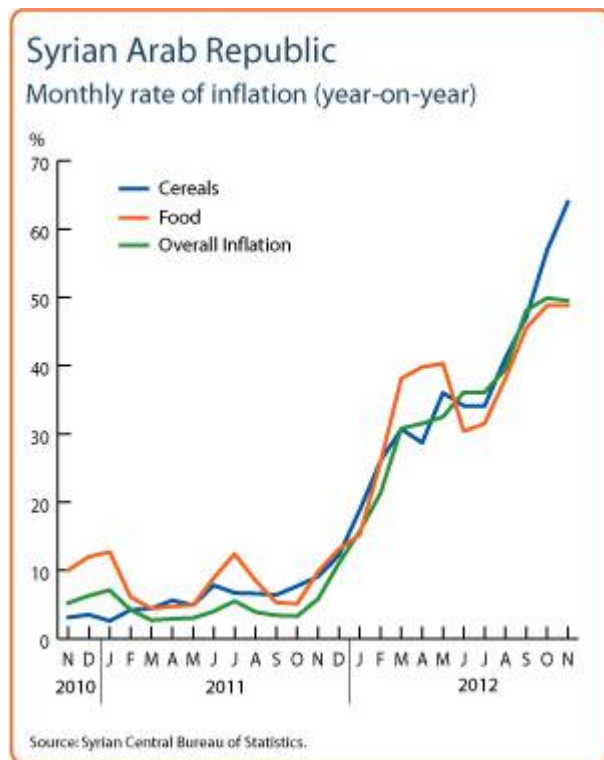
Continued civil unrest since mid-March 2011 has raised serious concern over the state of food security, particularly for vulnerable groups. Following the unrest, the economy contracted by 3.4 percent in 2011 and 19 percent in 2012. For 2013 external sources expect a contraction of over 13 percent. The economy continues to be under pressure from international sanctions which include an embargo on oil exports as well as restrictions on international trade, investment and financial transactions.

The Government's fiscal capacity to support producer and consumer subsidy schemes has come under severe strain following the economic downturn and the international sanctions.

Urgent humanitarian assistance needed to 4 million people

The FAO/WFP Crop and Food Security Assessment Mission (CFSAM) conducted between May and June 2013 estimated that approximately 4 million people are facing food insecurity. Most vulnerable groups include the internally displaced, small scale farmers, and herders; casual labourers, petty traders, the urban poor, children, pregnant and lactating mothers, the elderly, the disabled and the chronically sick.

Although WFP continues to provide food assistance to vulnerable Syrian populations in Jordan, Lebanon, Iraq, and Turkey, resources in host communities remain under strain. The WFP assistance in neighbouring countries is scaled to reach more than 1.2 million beneficiaries by December 2013, up from 795 000 in June 2013.



Reference Date: 24-September-2012

FOOD SECURITY SNAPSHOT

- Current estimates indicate well below-average cereal harvest in 2012 following escalation of conflict and inadequate rains
- Growing concern over the impact of prolonged civil unrest on the food security situation, especially of vulnerable groups
- Food inflation escalates since end of 2011
- High cereal import requirements forecast for 2012/13 (July/June) marketing year following expected reduction in domestic production

Poor crop harvest in 2012

A combination of drought conditions, insecurity and rising input and fuel prices has jeopardised prospects for the 2012 winter cereal crops. Insufficient rains affected major rainfed crops in Al Hasakah and Al Raqqa in the north and northeast while insufficient input supply and high labour costs affected agricultural activities. The civil insecurity that prevailed in most parts of the country prevented many farmers from accessing their farmland during important stages of crop development and harvest. In addition, lack of fuel to operate irrigation pumps and other equipment, as well as shortage of harvesters resulted in large unharvested croplands.

The last forecast from an Agriculture Ministry official in May 2012 put wheat production at an above average 3.7 million tonnes and barley at 843 000 tonnes. However, current estimates indicate a well below-average cereal harvest in 2012 following the escalation of civil unrest and conflict that is hampering normal agricultural activities.

Cereal import requirements expected to increase in current 2012/13 marketing year

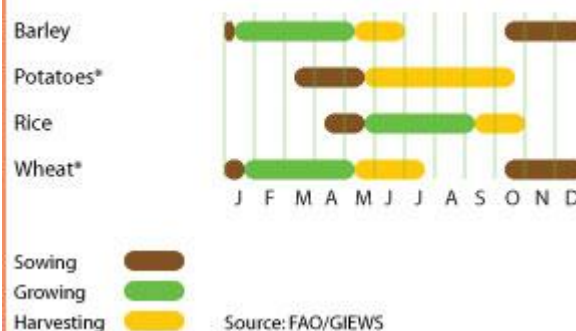
The Syrian Arab Republic normally relies heavily on food imports amounting to almost half of the total domestic utilization. In 2012, given the poor outlook for domestic cereal production, the cereal import requirement - mainly wheat for food use and maize and barley for feed - in marketing year 2012/13 (July/June) may reach more than 5 million tonnes, almost two million tonnes more than the previous year.

Food price inflation soars to record levels since end-2011

According to data from the Syrian Central Bureau of Statistics, the country's year-on-year inflation rate stood at 36.1 percent in July 2012, mainly driven by sharp increases in food prices and by fuel shortages that are impacting on transportation costs. The annual food inflation reached almost 32 percent in July 2012, a slight ease from the peak in May 2012. Prices of bread and cereals, major staples in the local diet increased sharply with a year-on-year inflation rate of about 34 percent in July 2012.

The total unemployment rate in the Syrian Arab Republic has increased from about 12 percent to 25 percent, and a large share of population is displaced. High unemployment levels coupled with high inflation rates seriously impacted the purchasing power of the population.

Syrian Arab Republic Crop calendar (*major foodcrop)

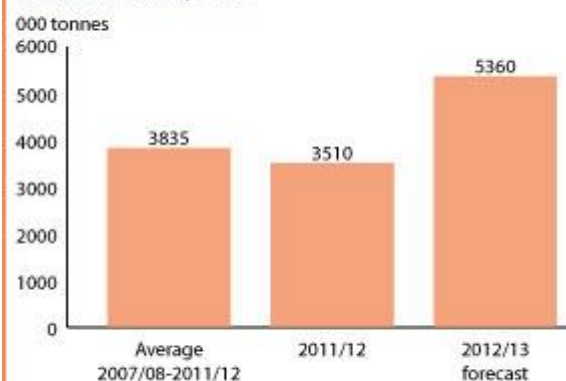


Syrian Arab Republic Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	3 363	3 850	2 500	-35
Barley	654	700	843	20
Maize	180	125	150	20
Others	7	8	8	0
Total	4 204	4 683	3 501	-25

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

Civil unrest aggravates food insecurity

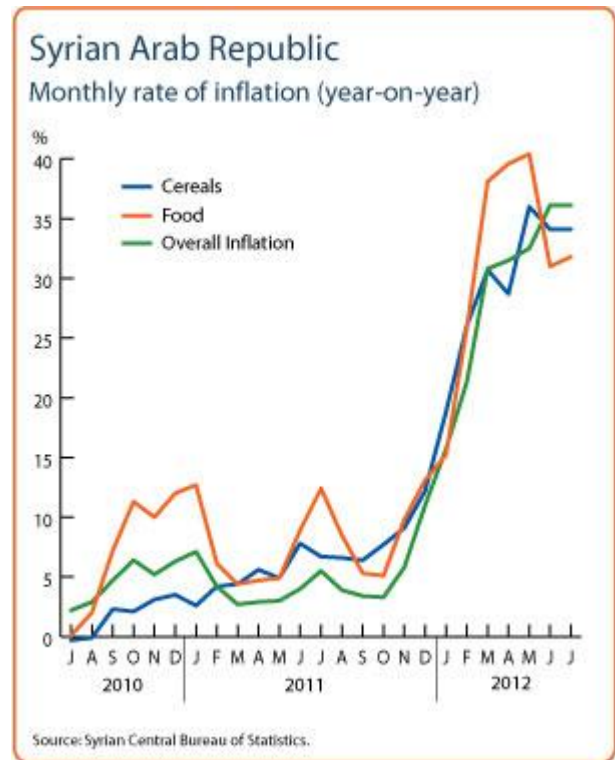
Continued civil unrest since mid-March 2011 has raised serious concern over the state of food security, particularly for vulnerable groups. Following the unrest, the economy in 2011 contracted by 3.4 percent. For 2012 the government expects a growth between 0 and 2 percent, while external sources expect a large contraction of over 8 percent. The economy continues to be under pressure from international sanctions which include an embargo on oil exports as well as restrictions on international trade, investment and financial transactions. Imports of agricultural commodities to the Syrian Arab Republic are affected by inability to finance imports as a result of restrictions.

The Government's fiscal capacity to support producer and consumer subsidy schemes has come under severe strain following the economic downturn and the international sanctions.

Urgent humanitarian assistance needed to 1.5 million people

The Joint Rapid Food Security Needs Assessment (JRFSNA) in the Syrian Arab Republic conducted in June has raised a serious concern over the state of the food security situation, particularly for vulnerable groups. The number of people in need of urgent food assistance has increased to 1.5 million (from an estimated one million last March) over the next three months alone. In the next 6 months this figure is estimated to double if current situations do not improve.

The WFP assistance reached 850 000 people in July 2012, up from 200 000 in March. Additional assistance is provided to Syrian refugees in Jordan, Lebanon, Turkey and Iraq. A revised Emergency Operation (EMOP) has been approved by WFP and FAO on 31 July 2012 to provide additional 25 365 tonnes of food (a total of 74 367 tonnes) to 850 000 vulnerable people to the end of 2012.



Reference Date: 26-July-2012

FOOD SECURITY SNAPSHOT

- Prospects for 2012 winter cereal crops is poor following escalation of conflict and inadequate rains
- Growing concern over the impact of prolonged civil unrest on the food security situation, especially of vulnerable groups
- Food inflation escalates since end of 2011
- High cereal import requirements forecast for 2012/13 (July/June) marketing year following expected reduction in domestic production

Poor prospects for current crops

A combination of drought conditions, insecurity and rising input and fuel prices has jeopardised prospects for the 2012 winter cereal crops. Insufficient rains affected major rainfed crops in Al Hasakah and Al Raqqah in the north and north-east while insufficient input supply and high labour costs affected agricultural activities. The civil insecurity that prevailed in most parts of the country prevented many farmers from accessing their farmland during important stages of crop development and harvest. In addition, lack of fuel to operate irrigation pumps and other equipment, as well as shortage of harvesters resulted in large un-harvested croplands.

The last forecast from an Agriculture Ministry official in May 2012 put wheat production at an above average 3.7 million tonnes and barley at 843 000 tonnes. However, current forecasts indicate a well below average cereal harvest in 2012 following the escalation of civil unrest and conflict that is hampering normal agricultural activities.

Syria's state-run General Establishment for Cereal Processing and Trade (Hoboob) has so far this year procured 1.25 million tonnes of wheat from local farmers. According to reports, the purchasing period that started on May 25 and is expected to end on August 15 targets the procurement of between 2.2 million to 2.4 million tonnes of local wheat.

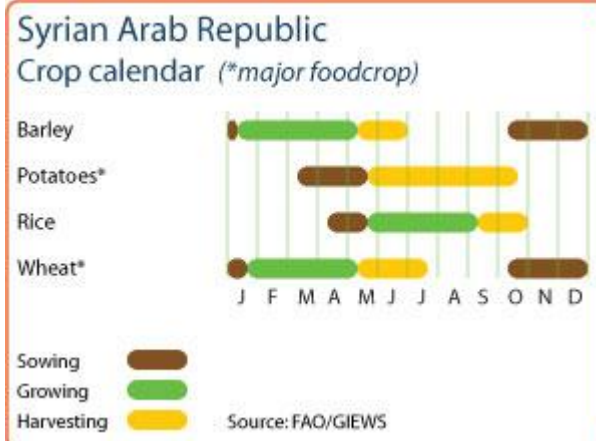
Cereal import requirements expected to increase in current 2012/13 marketing year

Syria normally relies heavily on food imports amounting to almost half of the total domestic utilization. In 2012, given the poor outlook for domestic cereal production, the cereal import requirement - mainly wheat for food use and maize and barley for feed - in marketing year 2012/13 (July/June) may reach as high as 5 million tonnes, almost one and half million tonnes more than the previous year.

Food price inflation soars to record levels since end-2011

According to data from the Syrian Central Bureau of Statistics, the country's year-on-year inflation rate stood at 32.5 percent in May 2012, mainly driven by sharp increases in food prices and by fuel shortages that are impacting on transportation costs. The food inflation reached over 40 percent in May 2012.

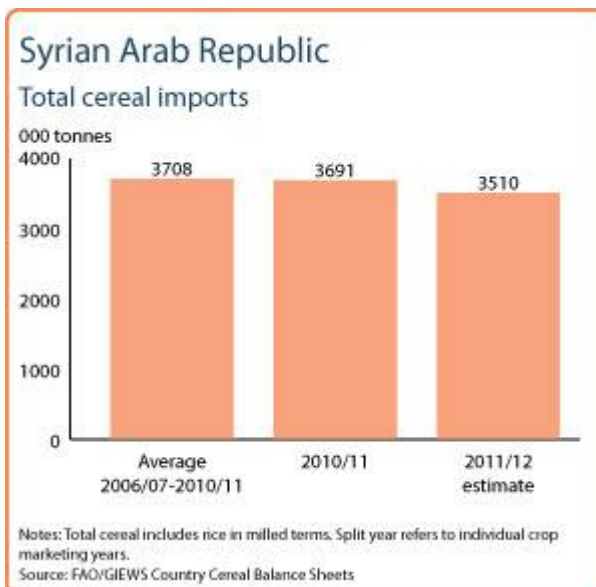
Prices of bread and cereals, major staples in the local diet increased



Syrian Arab Republic Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	3 579	3 083	3 850	25
Barley	755	680	700	3
Maize	187	133	125	-6
Others	7	8	8	0
Total	4 528	3 904	4 683	20

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



sharply with a year-on-year inflation rate of about 36 percent in May 2012 (5 percent on April 2012).

Total unemployment rate in Syria has increased from about 12 percent to 25 percent, and a large share of population is displaced. High unemployment levels coupled with high inflation rates seriously impacted the purchasing power of the population.

Civil unrest aggravates food insecurity

Continued civil unrest since mid-March 2011 has raised serious concern over the state of food security, particularly for vulnerable groups. Following the unrest, the economy in 2011 contracted by 3.4 percent. For 2012 the government expects a growth between 0 and 2 percent, while external sources expect a large contraction of over 8 percent. The economy continues to be under pressure from international sanctions which include an embargo on oil exports as well as restrictions on international trade, investment and financial transactions. Imports of agricultural commodities to Syria are affected by inability to finance imports as a result of restrictions.

The Government's fiscal capacity to support producer and consumer subsidy schemes has come under severe strain following the economic downturn and the international sanctions.

Urgent humanitarian assistance needed to 1.5 million people

A recently concluded Joint Rapid Food Security Needs Assessment (JRFSNA) in Syria has raised a serious concern over the state of the food security situation, particularly for vulnerable groups. The number of people in need of urgent food assistance has increased to 1.5 million (from an estimated one million last March) over the next three months alone. In the next 6 months this figure is estimated to double if current situations do not improve.

The WFP assistance reached 850 000 people in July 2012, up from 200 000 in March. Additional assistance is provided to Syrian refugees in Jordan, Lebanon, Turkey and Iraq. A revised Emergency Operation (EMOP) has been approved by WFP and FAO on 31 July 2012 to provide additional 25 365 tonnes of food (a total of 74 367 tonnes) to 850 000 vulnerable people to the end of 2012.



Reference Date: 20-April-2012

FOOD SECURITY SNAPSHOT

- Uncertain prospects for 2012 winter cereal crops
- Growing concern over the impact of prolonged civil unrest on food security situation of most vulnerable groups
- Food inflation escalates since end of 2011
- High cereal import requirements forecast for 2011/12 (July/June) marketing year following last year's low production

Uncertain prospects for current crops

The outlook for the 2012 winter cereal crops, currently at vegetative stage and for harvest from May, is uncertain given possible disruptions in overall agricultural activities and limited availability and access to inputs such as fertilizer and seeds. Last year's cereal production, estimated at 4.2 million tonnes, was about 10 percent less than the previous five years' average, following late and erratic rains that led to poor crop establishment, especially in major rainfed crop producing areas of Al Hasakah and Al Raqqah in the north and north-east. In addition, in several areas, it is reported that civil insecurity prevented farmers to access their farmland during the harvest.

Civil unrest raises concern for food security

Continued civil unrest since mid-March 2011 has raised serious concern over the state of food security, particularly for vulnerable groups. Following the unrest, a contraction is forecast in the 2011 real GDP and the downturn is expected to continue in 2012. Economic and trading sanctions together with the strong depreciation of the local currency are expected to negatively affect the country's commercial import capacity, including food commodities. The imposition of an additional 30 percent tax by Syria on goods imported from Turkey is expected to put further pressure on domestic prices and hence reduce access to food for poorer households.

Cereal import requirements expected to increase in current 2011/12 marketing year

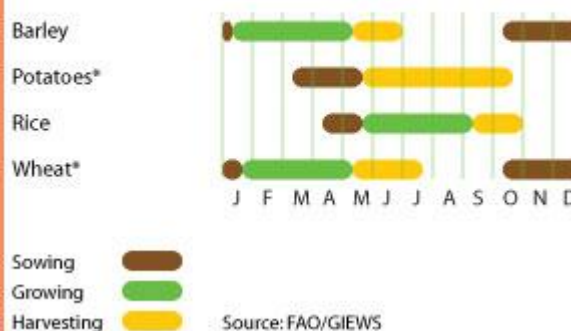
The country relies on food imports for almost half of its total domestic utilization. Preliminary forecast of cereal import requirements - mainly wheat for food use and maize and barley for feed - in marketing year 2011/12 (July/June) is put at about 4.0 million tonnes, about one million tonnes more than the previous year.

Food price inflation soars to record levels since end-2011

According to data from the Syrian Central Bureau of Statistics, the country's year-on-year inflation rate stood at about 21 percent in February 2012, mainly driven by sharp increases in food prices and by fuel shortages that are impacting on transportation costs. Year-on-year monthly food price inflation averaged at 8 percent in 2011, but accelerated strongly from December 2011 reaching a record level of 25.8 percent in February 2012.

Prices of bread and cereals, major staples in the local diet increased

Syrian Arab Republic Crop calendar (*major foodcrop)

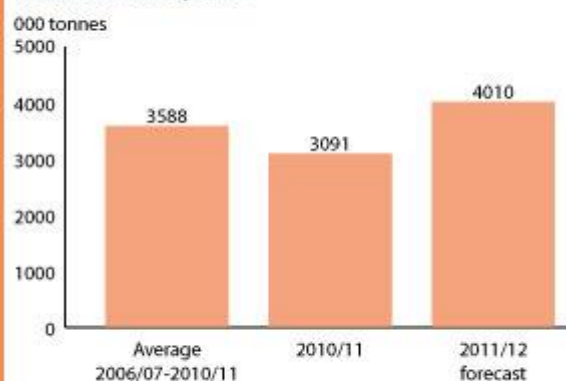


Syrian Arab Republic Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	3 683	3 600	3 250	-10
Barley	799	900	800	-11
Maize	196	181	180	-1
Others	7	8	8	0
Total	4 685	4 689	4 238	-10

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

sharply with a year-on-year inflation rate of about 26 percent in February 2012.

One million people in need of humanitarian assistance

According to the findings of an assessment led by the government together with the United Nations and the Organization of Islamic Cooperation in March 2012, an estimated one million Syrians are in need of humanitarian assistance. This figure includes people that have been directly affected by the civil unrest such as IDPs, those who have lost access to essential services (essentially security, food, health and education) and host families.

Recently, a budget increase to an Emergency Operation (EMOP) was approved by WFP and FAO for delivering food assistance to 100 000 people affected by the unrest until the end of 2012.



Reference Date: 14-March-2012

FOOD SECURITY SNAPSHOT

- Uncertain prospects for 2012 winter cereal crops
- Growing concern over the impact of prolonged civil unrest on food security situation of most vulnerable groups
- Food inflation continued to rise since June 2011
- High cereal import requirements forecast for 2011/12 (July/June) marketing year following last year's low production

Uncertain prospects for current crops

The outlook for the 2012 winter cereal crops, currently at vegetative stage and for harvest from May, is uncertain given possible disruptions in overall agricultural activities and limited availability and access to inputs such as fertilizer and seeds. Last year's cereal production, estimated at 4.2 million tonnes, was about 10 percent less than the previous five years' average, following late and erratic rains that led to poor crop establishment, especially in major rainfed crop producing areas of Al Hasakah and Al Raqqah in the north and north-east. In addition, in several areas, it is reported that civil insecurity prevented farmers to access their farmland during the harvest.

Civil unrest raises concern for food security

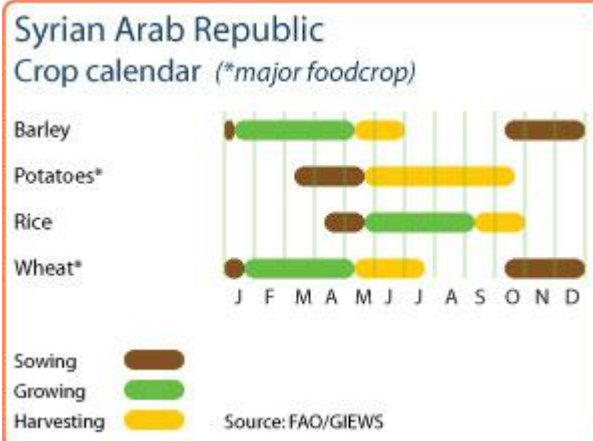
Continued civil unrest since mid-March 2011 has raised serious concern over the state of food security, particularly for vulnerable groups. Following the unrest, a contraction is forecast in the 2011 real GDP and the downturn is expected to continue in 2012. Economic and trading sanctions together with the strong depreciation of the local currency are expected to negatively affect the country's commercial import capacity, including food commodities. The imposition of an additional 30 percent tax by Syria on goods imported from Turkey is expected to put further pressure on domestic prices and hence reduce access to food for poorer households. According to the Syrian Central Bureau of Statistics, inflation increased between June and December 2011 by about 15 percent, mainly driven by sharp increases in food prices and by fuel shortages that are impacting on transportation costs.

Cereal import requirements expected to increase in current 2011/12 marketing year

The country relies on food imports for almost half of its total domestic utilization. Preliminary forecast of cereal import requirements - mainly wheat for food use and maize and barley for feed - in marketing year 2011/12 (July/June) is put at about 4.0 million tonnes, about one million tonnes more than the previous year.

Significant increase in the number of food insecure people

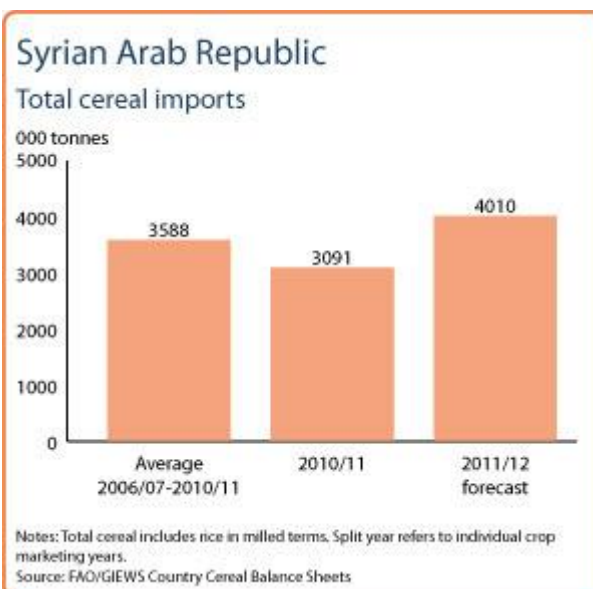
The United Nations World Food Programme (WFP) estimated in 2010 that about 1.4 million food insecure were living in areas which have now become conflict hotspots such as Homs, Hama, rural Damascus, Daraa and Idleb and the concern is that they now have become even more vulnerable. Tens of thousands of people have already fled to neighbouring countries. Access to food, water and fuel is reported to



Syrian Arab Republic Cereal production

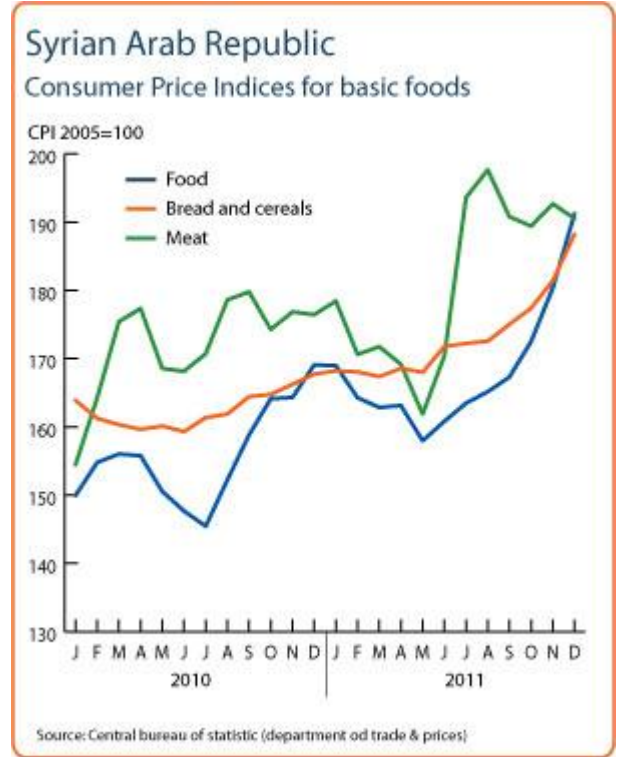
	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
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Barley	799	900	800	-11
Maize	196	181	180	-1
Others	7	8	8	0
Total	4 685	4 689	4 238	-10

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



have become increasingly difficult in several areas. An estimated 300 000 small farmers and herders in north-eastern provinces, who have already suffered four consecutive seasons of drought, are also affected by the loss of opportunities from seasonal labour migration to the south and east. In addition, the unrest is affecting pastoralists by restricting mobility of herds, with negative effects on access to water and pasture, and reducing the access veterinary drugs and other supplies. Overall, the economic downturn is also expected to impact government's fiscal capacity to support consumer and producer subsidy schemes.

A close monitoring of country's food security situation is needed and, as soon as conditions permit, a detailed in-country assessment is warranted in order to devise appropriate interventions. Recently, a budget increase to an Emergency Operation (EMOP) was approved by WFP and FAO for delivering food assistance to 100 000 people affected by the unrest until June 2012.



Reference Date: 14-October-2011

FOOD SECURITY SNAPSHOT

- Dry weather conditions, especially at planting time, affected yields of 2011 winter cereals
- High cereal import requirements forecast for 2011/12
- Food inflation on the rise since May 2011
- Growing concern over the impact of prolonged social unrest on food security situation of most vulnerable groups

Land preparation underway for planting of the 2011/12 winter crops

Planting of 2011 wheat and barley crops is about to start with the expected arrival of seasonal precipitations.

Reduced output for 2010/11 winter crops

Production of the 2011 winter cereal crops, harvested from last May, is estimated at 3.95 million tonnes, about 11 percent less than the last five years' average. Despite an increase in wheat planted area of about 10 percent compared to the previous year, yields have been severely affected by late and erratic rainfall at the beginning of the season, late last year, that led to poor crop establishment, especially in major rainfed-producing areas of Al Hasakah and Al Raqqah in the north and north-east. On the positive side, outbreaks of wheat yellow rust have been very limited as a consequence of timely treatments with fungicides and general dry winter conditions that contributed to the retardation of the development of the disease.

Cereal import requirements expected to increase in 2011/12

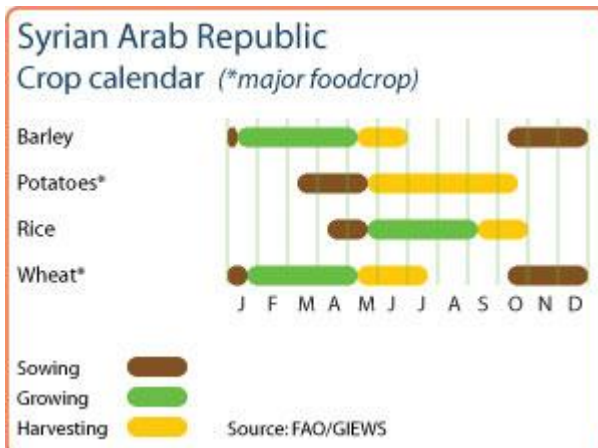
Preliminary forecast of cereal import requirements - mainly wheat for food use and maize and barley for feed - in marketing year 2011/12 (July/June) is put at about 4.6 million tonnes, about 700 000 tonnes more than the previous year. Imports of rice are forecast at 350 000 tonnes, similar to the high levels of the previous two years, partly in response to the additional demand from over 1 million Iraqi refugees in the country.

Food inflation resurgence from May 2011

According to the Central Bureau of Statistics, food price inflation declined from its peak in December 2010 and a downward trend followed until May 2011 when it started to climb again. By August 2011 food price inflation rose by about 4.5 percent. The change in trend is mainly driven by prices of meat that increased by about 22 percent between May and August, while prices of bread and cereals were stable and prices of vegetables dropped by almost 13 percent.

Prolonged social unrest raises concerns for food security

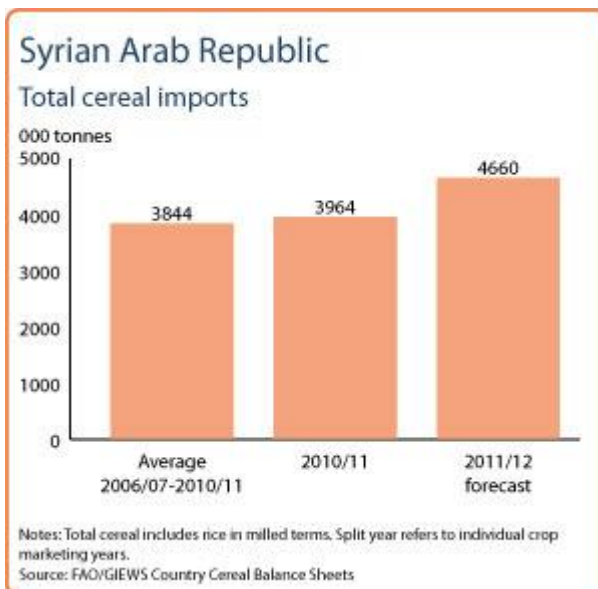
According to the Institute of International Finance (IIF), the economic toll from the current political and social unrest will affect economic growth this year by more than 1 percent. The recent European ban on



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
Total	4 604	4 479	4 079	-9

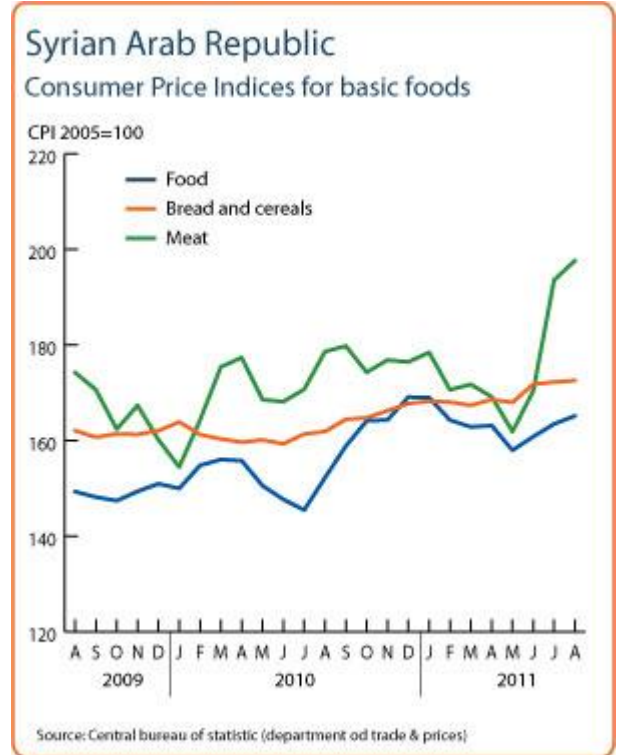
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



oil imports from Syria is expected to further contract the local economy, with likely negative effects on the country's financial capacity to buy imported goods, including food. The prolonged unrest is often causing disruptions in food distribution channels, leading to localized shortages in several markets.

Syria already hosts one of the largest urban refugee population in the world, with nearly 1 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 by FAO and WFP in May 2011 for assistance of up to 115 000 Iraqi refugees in Syria, worth USD 45.3 million for a period of 8 months, ending by 31 December 2011.



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

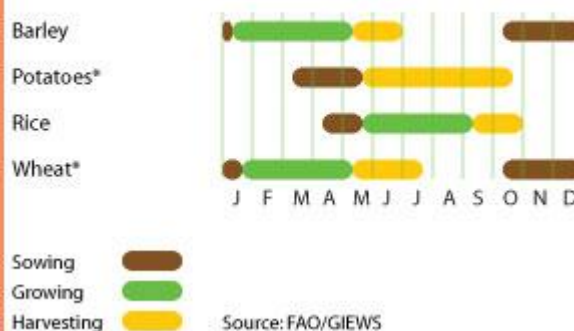
Cereal imports - mainly wheat for food use and maize and barley for feed – in the current and ending marketing year 2010/11 (July/June) are forecast at about 4.1 million tonnes. At this level, although still above average, imports are about 10 percent lower than in 2009/10 when the replenishment of stocks 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)

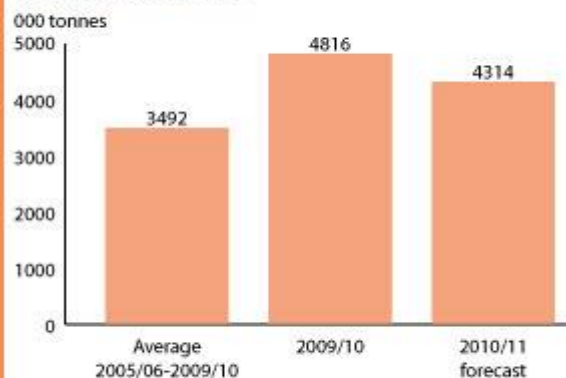


Syrian Arab Republic Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
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Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Syrian Arab Republic Total cereal imports



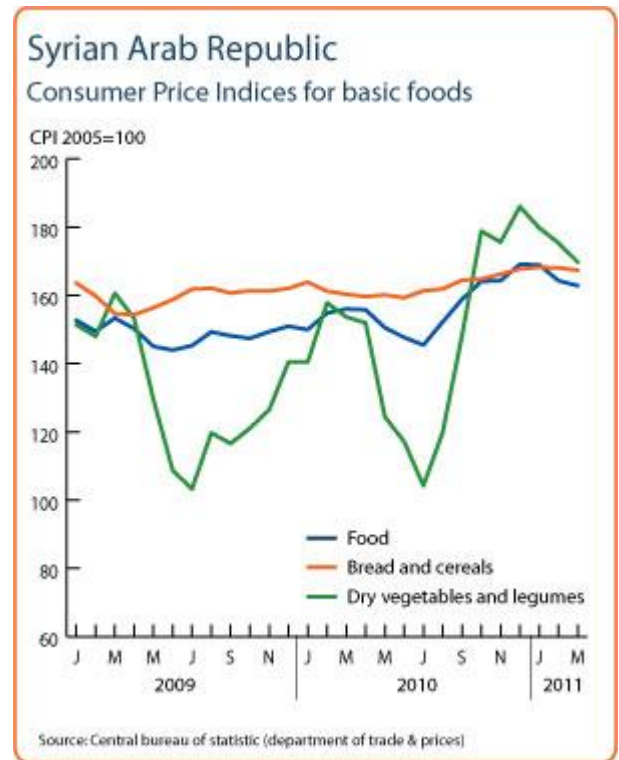
Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

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).



Reference Date: 9-February-2011

FOOD SECURITY SNAPSHOT

- Despite a yellow rust outbreak, 2010 winter cereal crop production was at good level.
- Lower cereal import requirements forecast in 2010/11 (July/June).
- High food inflation rate from mid-2010

Late onset of rainy season delay planting of 2011 winter crops

Planting of the 2011 winter cereal crops, to be harvested from May/June, has been recently completed. Seasonal rains started late at the beginning of December with negative impact on crop establishment.

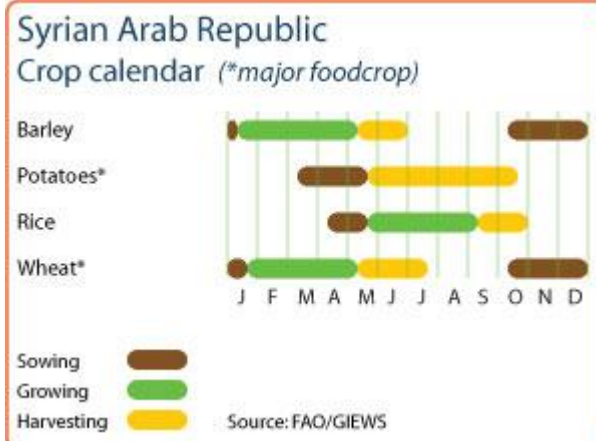
Despite some losses due to a yellow rust infestation that especially affected yields of soft wheat varieties in north-eastern province of al-Hassakeh, aggregate cereal production in 2010 is estimated at good level of 4.75 million tonnes, similar to the 2009 output and about 4 percent above last five years average.

Cereal import requirements expected to decline in 2010/11, but would still be above average

Cereal import requirements - mainly wheat for food use and maize and barley for feed use – in marketing year 2010/11 (July/June) are forecast at about 4.1 million tonnes. At this level, imports are above average, but lower than previous year when they were relatively high to replenish stocks that were depleted after the drought-affected 2008/09 winter season. Imports of rice are forecast at high 330 000 tonnes, similar to last two years, partly in response to the additional demand from over one million Iraqi refugees in the country.

High food inflation rate in last semester of 2010

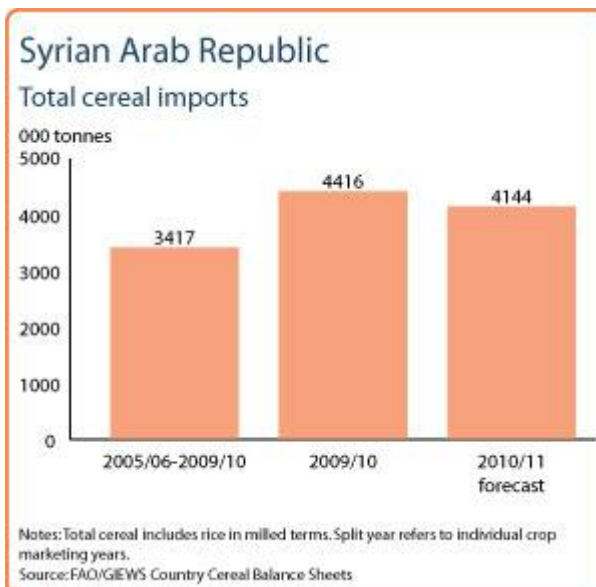
According to the Central Bureau of Statistics, annual consumer price inflation rose at 6.9 percent in 2010, compared to 3 percent in 2009. The main reason for this inflationary surge is a sharp increase in the food and beverage price index that rose by 16.3 percent during the second semester of 2010. In this period, prices of vegetables and legumes increased by almost 80 percent, substantially more than the normal seasonal increase of 35-45 percent. In December 2010, prices of bread and cereals were well below record levels of mid-2008, but have shown a steady rising trend in last 6-7 months following the increase of wheat prices on international markets.



Syrian Arab Republic Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	3750	3700	3600	-3
Barley	672	850	1000	18
Maize	165	150	150	0
Others	6	4	4	0
Total	4593	4704	4754	1

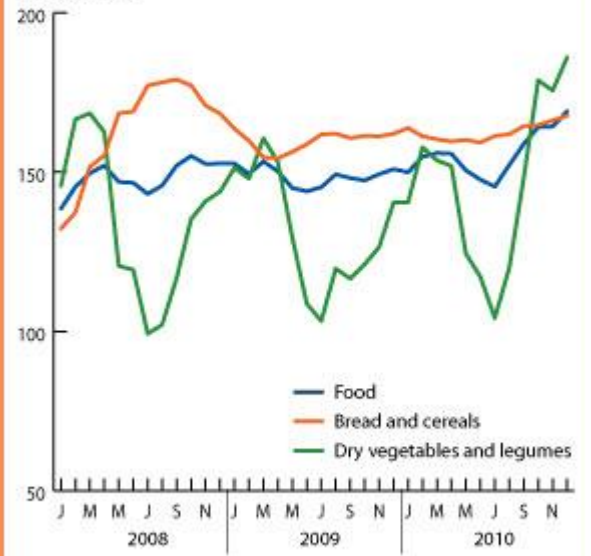
Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Syrian Arab Republic

Consumer Price Indices for basic foods

CPI 2005=100



Source: Central bureau of statistic (department of trade & prices)

Reference Date: 15-October-2010

FOOD SECURITY SNAPSHOT

- Wheat production in 2010 severely affected by yellow rust.
- Lower cereal import requirements forecast in 2010/11 (July/June).

Output of the 2010 winter cereal crops put well below average level

Planting of the 2011 winter cereal crops is about to begin.

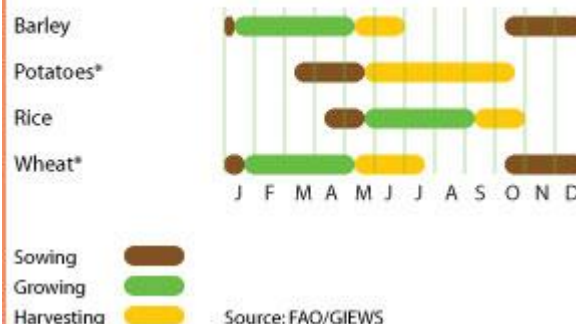
Production of 2010 winter cereal crops is estimated at 3.3 million tonnes of wheat, about 18 percent below previous year. The low output is due to a widespread infestation of yellow rust that, coupled with some frosts in late March, has severely affected wheat yields. The disease outbreak was particularly strong on locally developed soft wheat varieties and concentrated in the north-eastern province of al-Hassakeh. Low rainfall in some rain-fed areas had also a negative impact on wheat yields.

Overall, the aggregate cereal production in 2010 is estimated at 4.2 million tonnes, about 9 percent below the last five years average and 15 percent below the good output of 5.0 million tonnes obtained in 2009.

Cereal import requirements expected to decline in 2010/11, but would still be above average

Early forecast for cereal import requirements - mainly wheat for food use and maize and barley for feed use – in marketing year 2010/11 (July/June) is put at about 4 million tonnes. At this level, imports are above average, but lower than previous year when, despite the good production, they were relatively high to replenish stocks that were depleted during the drought-affected 2008/09 winter season. Imports of rice are forecast at a high of 300 000 tonnes, similar to the last two years, partly in response to the additional demand from the over one million Iraqi refugees in the country.

Syrian Arab Republic Crop calendar (*major foodcrop)

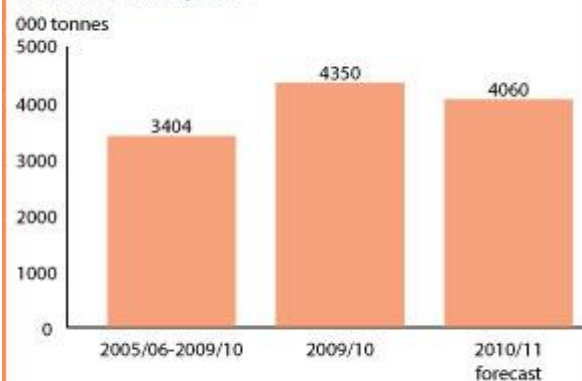


Syrian Arab Republic Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	3810	4000	3300	-18
Barley	672	850	800	-6
Maize	165	150	150	0
Others	6	4	4	0
Total	4653	5004	4254	-15

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

Reference Date: 09-September-2010

FOOD SECURITY SNAPSHOT

- Wheat production in 2010 severely affected by yellow rust.
- Lower cereal import requirements forecast in 2010/11 (July/June).

Output of 2010 winter cereal crops put well below average level

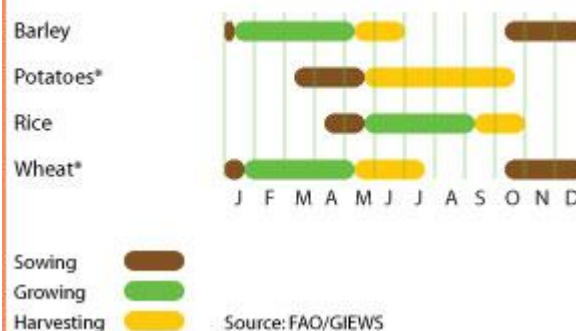
Harvesting of 2010 winter cereal crops has been completed and production is estimated at 3.3 million tonnes of wheat, much lower than earlier forecast of a record crop of 4.5 million tonnes. The optimistic forecast was based on the favourable weather conditions until last March and increase in planted area due to the attractive prices offered by the state-owned General Establishment for Cereals Trade and Processing (HOBOOB). However, a widespread infestation of yellow rust, coupled with some frosts in late March, has severely affected wheat yields with a reduction of about 30 percent on the expected record output. The disease outbreak was particularly strong on locally developed soft wheat varieties and concentrated in the north-eastern province of al-Hassakeh. Low rainfall in some rain-fed areas had also a negative impact on wheat yields. Barley output in 2010 is put at 800 000 tonnes compared to 850 000 in 2009.

Overall, the aggregate cereal production in 2010 is estimated at 4.2 million tonnes, about 9 percent below the last five years average and 15 percent below the good output of 5.0 million tonnes obtained in 2009.

Cereal import requirements expected to decline in 2010/11, but would still be above average

Early forecast for cereal import requirements - mainly wheat for food use and maize and barley for feed use – in marketing year 2010/11 (July/June) is put at about 4 million tonnes. At this level, imports are above average, but lower than previous year when, despite the good production, they were relatively high to replenish stocks that were depleted during the drought-affected 2008/09 winter season. Imports of rice are forecast at high 300 000 tonnes, as during last two years, partly in response to the additional demand from the over one million of Iraqi refugees in the country.

Syrian Arab Republic Crop calendar (*major foodcrop)

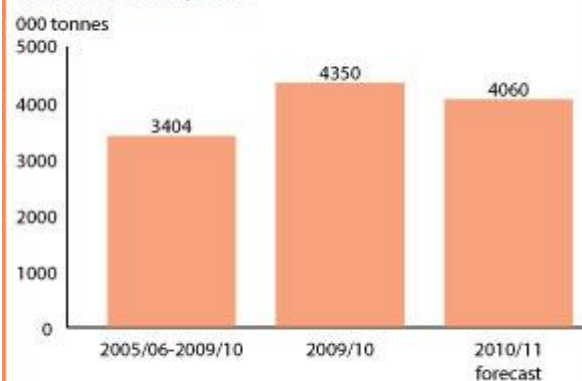


Syrian Arab Republic Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	3810	4000	3300	-18
Barley	672	850	800	-6
Maize	165	150	150	0
Others	6	4	4	0
Total	4653	5004	4254	-15

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

Syrian Arab Republic Total cereal imports



Reference Date: 03-June-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2010 winter crops.
- Lower cereal imports estimated in 2009/10 (July/June) due to recovery in cereal production.

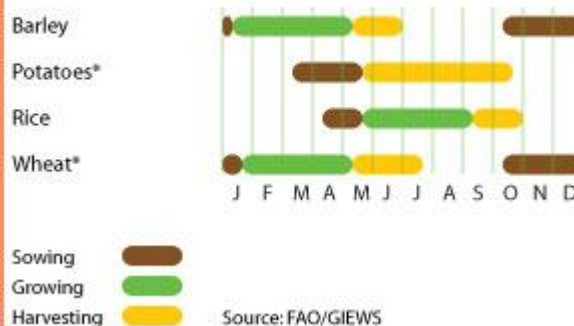
Bumper production expected for 2010 winter cereal crops

Harvesting of 2010 winter wheat and barley crops is underway and production prospects are very positive. Abundant precipitations from September 2009 to March 2010 in most of the country have provided ample moisture for crops establishment and growth. In addition, wheat and barley planted area in 2010 increased by about 300 000 hectares following the attractive wheat prices offered by the state-owned General Establishment for Cereals Trade and Processing (HOBOOB) and the recent introduction of a new levy on barley imports. Precipitation ended in April, about a month earlier than usual, increasing irrigation requirements for late-filling grain crops and accelerating crop maturation and dry down. Early estimate of aggregate wheat and barley production in 2010 is put at a bumper level of 5.5 million tonnes. This compares with 4 million tonnes of wheat and 850 000 tonnes of barley in 2009.

Imports in 2009/10 are expected to be lower than the record levels of 2008/09

Cereal import requirements - mainly wheat for food use and maize and barley for feed use – in marketing year 2009/10 (July/June) are forecast at about 4.9 million tonnes, compared to the record 5.5 million tonnes imported in the previous year when cereal production and pasture availability were severely hit by dry weather conditions. Imports of rice are forecast at a high of 300 000 tonnes, partly in response to the additional demand from the over one million of Iraqi refugees in the country.

Syrian Arab Republic Crop calendar (*major foodcrop)

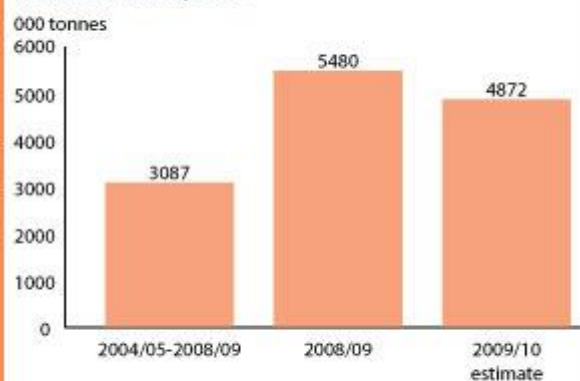


Syrian Arab Republic Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	3810	4000	4500	12
Barley	672	850	1000	18
Maize	165	150	150	0
Others	6	4	4	0
Total	4653	5004	5654	13

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

Reference Date: 31-March-2010

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2010 winter crops.
- Lower cereal imports estimated in 2009/10 due to recovery in cereal production from the 2008 poor harvest.

Good outlook for 2010 winter cereal crops

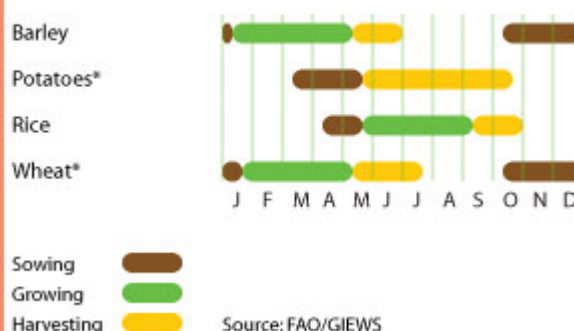
Harvesting of 2010 winter wheat and barley crops is expected to start in May. Abundant precipitation since December 2009 has increased soil moisture throughout the country and favoured crops development. In addition, 2010 planted area under wheat increased by 200 000 hectares mainly due to farmers shifting from barley, cotton and sugar beet production. This followed the attractive wheat price offer, almost double the international prices, by the state-owned General Establishment for Cereals Trade and Processing (HOBBOB).

Assuming a positive rainfall situation during the remaining period of the season, especially in the critical grain-filling stage, the early forecast for the 2010 winter wheat and barley crops is put at 4.5 million tonnes and one million tonnes respectively. This compares with 4 million tonnes of wheat and 700 000 tonnes of barley in 2009.

Imports in 2009/10 are expected to be lower than the record levels of 2008/09

Cereal import requirements - mainly wheat for food use and maize and barley for feed use – in marketing year 2009/10 (July/June) are forecast at about 4 million tonnes, compared to the 5.1 million tonnes imported in the previous year when cereal production and pasture availability were severely hit by dry weather conditions. Imports of rice are forecast at a high of 350 000 tonnes, partly in response to the additional demand from the over one million of Iraqi refugees in the country. The country banned export of wheat flour and semolina in 2008 due to the poor harvest, but exports may resume in 2010.

Syrian Arab Republic Crop calendar (*major foodcrop)

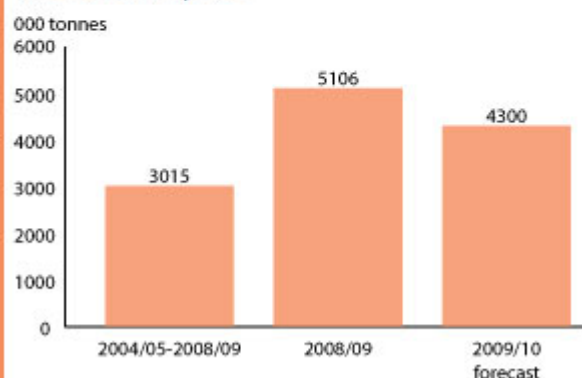


Syrian Arab Republic Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Wheat	4053	2087	4000	92
Barley	579	200	700	250
Maize	150	100	100	0
Others	6	4	4	0
Total	4788	2391	4804	101

Note: percentage change calculated from unrounded data.

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

Reference Date: 01-February-2010

FOOD SECURITY SNAPSHOT

- More rains need for 2010 winter crops in the East
- 2009 cereal production higher than 2008, but still lower than average

Low rains affect development of 2010 winter crops

Planting of 2010 winter wheat and barley crops to be harvested from May has just been completed. Dry weather conditions have reduced topsoil moisture for vegetative crops, especially in eastern areas of the country. Recent precipitation is expected to improve production prospects but more is needed.

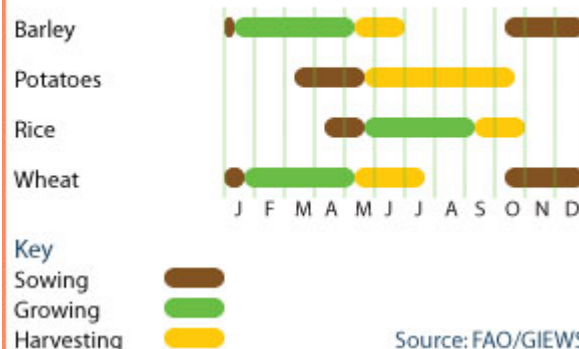
Cereal production in 2009 rebounds from 2008 poor harvest

In 2008 and 2009 dry weather conditions have affected production resulting in major crop and animal losses in north-eastern parts of the country. In July 2009, a Joint United Nations Drought Assessment Mission estimated the 2009 wheat production at 3.2 million tonnes, 22 percent less than the long-term average of 4.2 million tonnes and 35 percent lower than the record levels of 5 million tonnes attained in 2003 and 2006. However, at that the level the 2009 harvest was still about 58 percent higher than in 2008, the worst drought year in last 40 years. The consecutive drought years has also affected the availability of pasture for livestock, causing deaths of animals and disruption of pastoralist livelihood systems. The situation has forced 250-300 thousand families (some 1.25 -1.5 million people) to leave their villages and move to the suburbs of Damascus and other cities like Aleppo and Daa'ra.

Imports expected to lower from 2008/09 record

Cereal import requirements - mainly wheat for human consumption and maize for feed use – in marketing year 2009/10 (July/June) are forecast at about 4 million tonnes, compared to the 5.1 million tonnes imported in the previous year, but significantly higher than the average level of 2.4 million tonnes in the previous five years.

Crop calendar Syrian Arab Republic

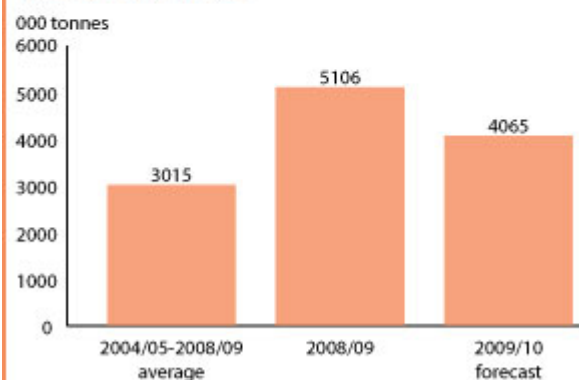


Syrian Arab Republic Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Wheat	4053	2087	3240	55
Barley	579	200	500	150
Maize	150	100	100	0
Others	6	4	4	0
Total	4788	2391	3844	61

Note: percentage change calculated from unrounded data.

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