



## 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

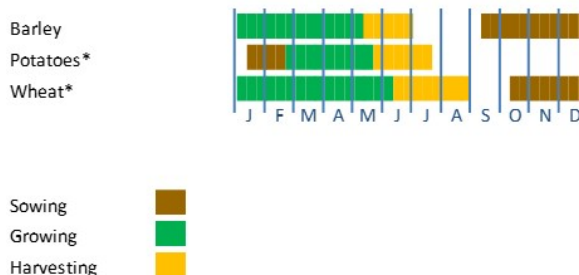
Sowing of winter wheat and barley crops, for harvest from May onwards, usually takes place between late September and December after seasonal rainfall replenish soil moisture. Although seasonal rainfall across much of the country started on time in September 2022, the amounts were rather limited. The 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	2021	2022	change
	average		estimate	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
<b>Total</b>	<b>3 070</b>	<b>1 419</b>	<b>1 506</b>	<b>6.1</b>

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

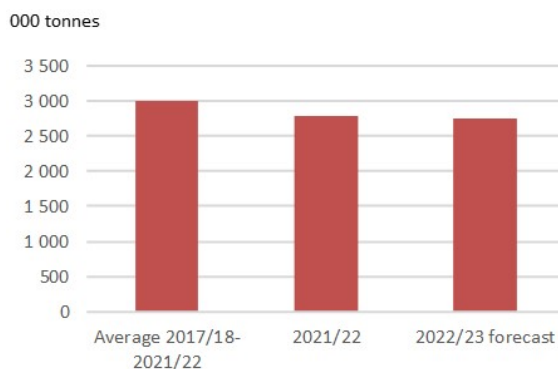
Erratic weather in the 2021/22 crop season, including insufficient and poorly distributed rainfall, frost and high temperatures, together with high cost of inputs (including fuel for pumping) and limited availability of irrigation water, resulted in a below-average cereal production. Wheat production 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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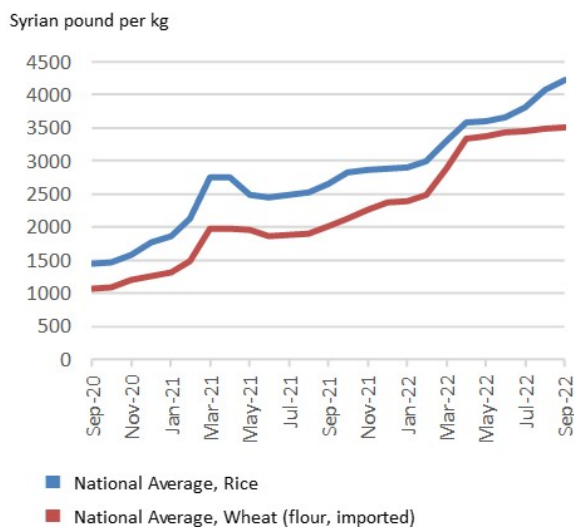
### Cereals Imports



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.

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### 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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