

THE RUSSIAN–UKRAINIAN CONFLICT AND ITS FOOD SECURITY IMPLICATIONS IN NORTHWEST SYRIA

SITUATION REPORT

April, 2022

KEY TAKEAWAYS

- Food prices throughout Syria are increasing, up 86% in January compared to the same time in 2021, leading to more food insecurity, particularly in the northwest which is largely dependent on humanitarian food aid and imports from Turkey.
- The conflict in Ukraine threatens to disrupt global trade in essential items, with Ukraine's production capacity severely diminished and sanctions on Russian goods interrupting supply lines; a situation which has a knock-on effect into Turkey and Turkish imports into northwest Syria.
- Turkey imports 69.7% of its sunflower oil and 78% of its wheat from Ukraine and Russia. Any potential price increases or wheat shortages in Turkey are likely to affect Syria's northwest, which is highly dependent on Turkish wheat imports.
- The Turkish-supported Syrian Interim Government and the opposition's Syrian Salvation Government, both ruling administrations in the region, have implemented policies to combat the high levels of food insecurity, largely relating to bread production.
- The instability of the Turkish lira (used throughout the northwest), poor domestic production, bans on imports from Turkey, and regional and international restrictions on the administrations are likely to undermine any possible gains of local policymaking.
- In an area already heavily dependent on humanitarian aid, particularly aid coordinated by the UN in Turkey and sent through the Bab al Hawa border crossing, maintaining this humanitarian assistance is essential.
- Without a resolution to the conflict in Ukraine, global wheat, oil and energy prices are set to soar, affecting heavily dependent countries like Turkey the most. Countries and regions like northwest Syria which are already struggling will need more help to both deal with and recover from the fallout.



On 24 February 2022, Russian troops entered Ukraine, targeting civilian infrastructure, hospitals, and food supply chains. The continuing devastation and conflict have shocked the world while after-effects are being felt throughout Europe and the Middle East, dependent on both fuel from Russia and wheat and grain from Ukraine's 'breadbasket of Europe'.

INTRODUCTION

The conflict in Ukraine threatens to exacerbate Syria's increasing food insecurity. Food insecurity in the country has been gradually rising following a decade of conflict, economic and financial instability, and a severe drought which hit last year's harvest.

The World Food Programme's January Situation Report stated that "food prices were 34 percent higher than six months ago, and 86 percent higher compared to the same time last year" making food items increasingly unaffordable for citizens.¹

Additionally, Stéphane Dujarric, Spokesperson for the Secretary-General, stated in February that the number of food insecure people in Syria increased by 9% (1.2 million), now reaching 14.6 million, with families facing increased difficulties in meeting their basic needs.² The problem is particularly acute in northwest Syria where more than 4.1 million people (as of February 2022) are food insecure.³ A significant portion of the population live in overcrowded IDP camps and are heavily reliant on humanitarian aid which enters through the Bab al Hawa border crossing with Turkey.⁴

RUSSIA–UKRAINE CONFLICT DISRUPTS FOOD PRODUCTION AND TRADE

The conflict in Ukraine has seemingly damaged Ukraine and Russia's capabilities, albeit to different extents, to produce and trade goods, particularly food products, which a significant part of the world is dependent on: both countries combined produce 69% of the world's sunflower exports and 29% of wheat exports. In Ukraine, the fighting has led to (US) \$100 billion worth of infrastructure damage, 4 million Ukrainian refugees exiting to neighbouring countries as of 29 March, the closure of seaports and airports, the destruction of roads and bridges, and an export ban on several food items.^{5,6,7,8,9}

Russia, on the other hand, was targeted with 2,827 new sanctions following its entry into Ukraine, affecting its institutions and leadership to the extent that the IMF stated that they "will severely restrict its [Russian] access to international reserves to support its currency and financial system" and disrupt its "ability to receive payments for exports, pay for imports and engage in cross-border financial transactions" potentially affecting its ability to export and trade.^{10,11,12}

¹ World Food Programme. [WFP Syria Situation Report #1, January 2022](#). January 2022

² United Nations. [سوريا: ارتفاع أعداد الأشخاص الذين يحتاجون للمساعدة الإنسانية هذا العام](#). February 2022

³ OCHA. [Developments in Northwest Syria and Ras al Ain- Tell Abiad](#). February 2022.

⁴ Washington Institute. [Facing Syria's Food Crisis](#). February 2022

⁵ International Monetary Fund. [IMF Staff Statement on the Economic Impact of War in Ukraine](#). March 2022

⁶ Government of Ukraine. [Government amid martial law has established new rules for the export of a number of agricultural goods](#). March 2022

⁷ Items banned for export by the Ukrainian government: oats, millet, buckwheat, sugar, salt, wheat, cattle, meat, corn, eggs, chicken, sunflower oil.

⁸ UNDP. [Every day of delayed peace will accelerate a freefall into poverty for Ukraine](#), warns UNDP. March 2022

⁹ UNHCR. [Operational Data Portal](#). [updated regularly] March 2022

¹⁰ International Monetary Fund. [IMF Staff Statement on the Economic Impact of War in Ukraine](#). March 2022

¹¹ Statista. [The World's Most-Sanctioned Countries](#). March 2022

¹² U.S. Department of the Treasury. [U.S. Treasury Announces Unprecedented & Expansive Sanctions Against Russia, Imposing Swift and Severe Economic Costs](#). February 2022

The above-mentioned developments are likely to disrupt supply of essential food items produced from both countries and lead to price increases.¹³ Indeed, the World Food Programme (WFP) reported that 13.5 million tonnes of wheat and 16 million tonnes of maize bound for export have been frozen in both countries.¹⁴ The conflict has also affected WFP wheat procurement; 70% of wheat is procured from both Ukraine and Russia with the WFP expecting that disrupted supply lines from the black sea region will raise wheat procurement costs by 23 million USD per month.¹⁶¹⁷¹⁸ Moreover the global price of sunflower oil and wheat increased approximately 7% and 39% respectively since the start of the crisis (shown in Figure 1).¹⁹

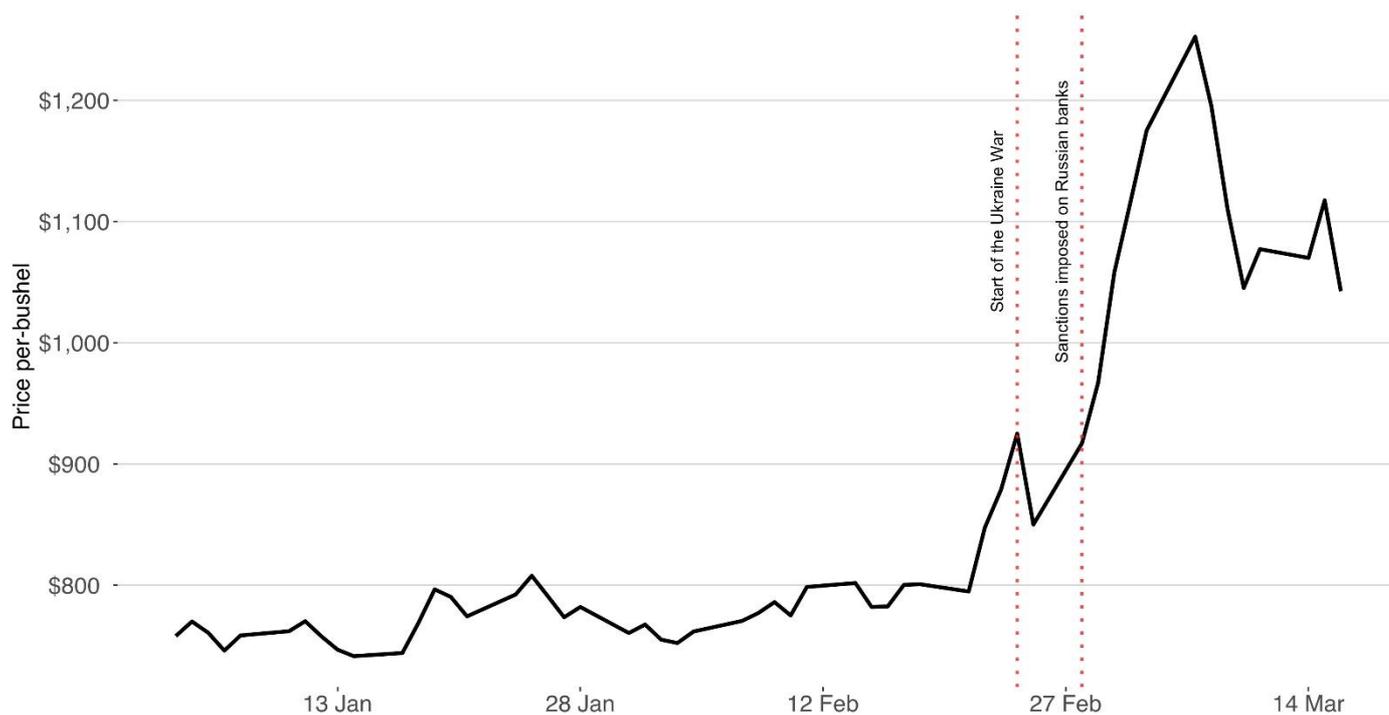


Figure 1: The per-bushel price of wheat in 2022 (as of 15 March). Source: [Macrotrends](#)

¹³ International Monetary Fund. [IMF Staff Statement on the Economic Impact of War in Ukraine](#). March 2022

¹⁴ WFP stated that the frozen wheat and maize exports amount to 23 and 43 percent of their expected exports in 2021/22

¹⁵ WFP. [Food security implications of the Ukraine conflict](#). March 2022

¹⁶ Financial Times. [Food crisis looms as Ukrainian wheat shipments grind to halt](#). March 2022

¹⁷ WFP. [Food security implications of the Ukraine conflict](#). March 2022

¹⁸ According to the WFP, some of the world's current hunger hotspots such as Afghanistan, Ethiopia, Syria and Yemen are likely to be most affected by the increased procurement difficulties because of their dependency on wheat."

¹⁹ Since the start of the crisis, global sunflower oil prices increased by 7% between 31 January and 28 February while global wheat prices increased 39% between 18 February and 11 March.

TURKISH DEPENDENCE ON RUSSIAN AND UKRAINIAN WHEAT

Many countries stand to lose out from the conflict in Ukraine, and Turkey is no exception. According to the Turkish Statistical Institute, Turkey imports 69.7% of its sunflower oil and 78% of its wheat from Ukraine and Russia. Ukrainian–Russian wheat imports are essential for Turkey, providing it with a significant percentage of its wheat needs (shown in Figure 2).²⁰ Additionally, being forced to import its wheat from other wheat producers such as the US, Canada, or Australia will increase cost of imports because of the increased transportation cost when compared to imports from the Black Sea region.²¹

This expected increase would be difficult at a time when the Turkish lira has depreciated by 9% since the start of the fighting, to 15 TRY per USD on 10 March, further reducing real wage values and increasing unaffordability.²² Indeed, as reported by The New York Times, many of Turkey’s citizens, dependent on subsidized bread, are already unable to afford it due to the lira’s depreciation and consequent price increase. Additional wheat import costs may increase prices, further exacerbating food insecurity and the precarious livelihood situation due to the country’s financial and economic volatility.²³ Any potential price increases or wheat shortages in Turkey is likely to affect Syria’s northwest, which is highly dependent on Turkish wheat imports.

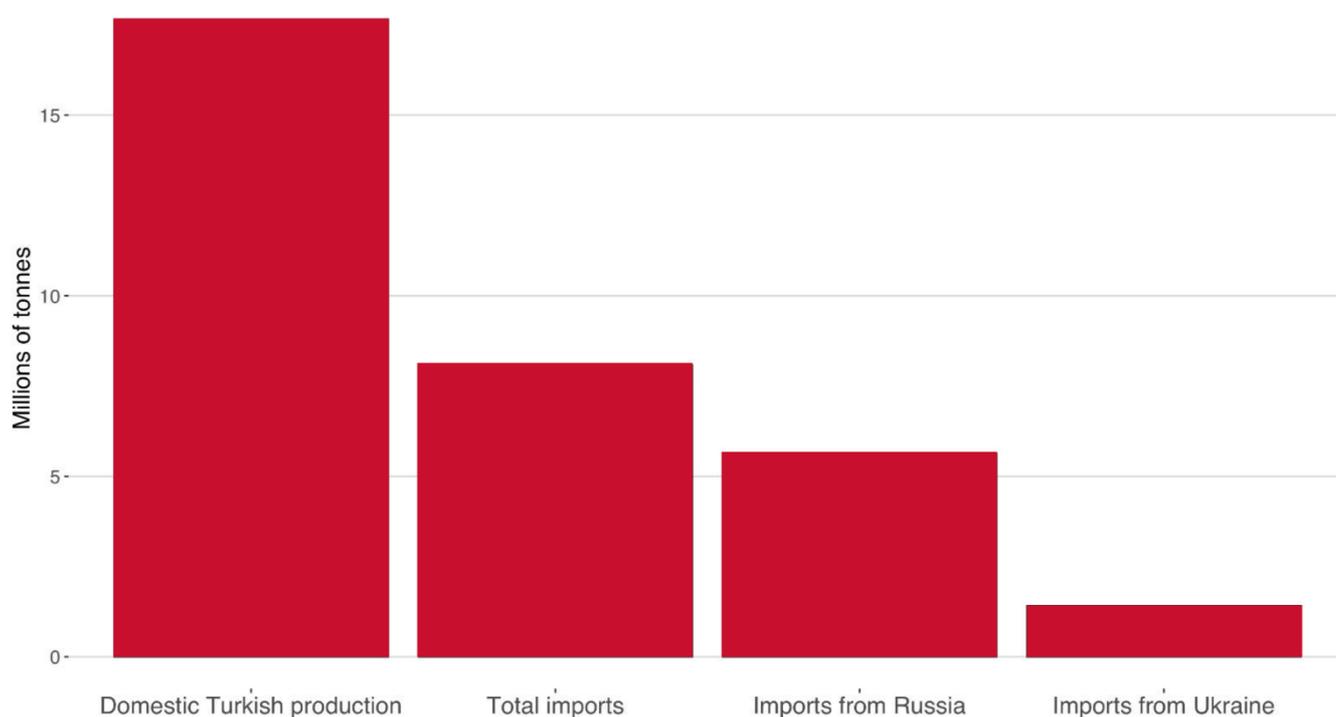


Figure 2: Wheat production and imports in Turkey in 2021. Source: [Turkey’s wheat imports from Ukraine hit record](#)

²⁰ Ahval. [Ukraine crisis to have profound impact on Turkish economy – analysis](#). February 2022

²¹ Financial Times. [Food crisis looms as Ukrainian wheat shipments grind to halt](#). March 2022

²² Financial Post. [Lira at December lows as Ukraine fallout hits Turkish economy](#). March 2022

²³ The New York Times. [Many Turks Can’t Afford Bread, and Bakers Can’t Afford to Make It](#). December 2021

WHEAT AVAILABILITY IN NORTHWEST SYRIA

Prior to the conflict in Ukraine, the local and IDP populations in northwest Syria were facing food insecurity. Bread, a staple food which many Syrian citizens rely on for sustenance, was already becoming unaffordable. The record low depreciation of the Turkish lira in December 2021 (which reached 16.66 TRY per USD) led to an increase in fuel and commodity prices, eventually forcing both the Syrian Interim Government (SIG) and the Syrian Salvation Government (SSG) to simultaneously increase bread prices and lower the weight of bread bundles.^{24,25} This led to bread queues becoming longer in addition to reports of corruption relating to the sale of subsidized bread surfacing.²⁶

In terms of domestic production, northwest Syria does not have a local wheat production capacity sufficient to cover its domestic bread needs. The SSG stated that Idleb governorate's 2021 wheat production fell from 700,000 tonnes to 33,500 tonnes, compared to the previous year.²⁷ The decrease was the result of a reduction in cultivated land from approximately 19,000 hectares to 9,800 hectares due to low rainfall levels and farmers' growing preference to cultivate profitable crops such as beans and nigella seeds instead. In SIG areas, the Minister of Economy, Abdulhakim Almasri, stated that annual wheat production in both Olive Branch and Euphrates Shield areas did not exceed 100,000 tonnes, a number insufficient to cover their daily need for 550 tonnes of flour year-round (a gap of 100,750 tonnes).²⁸

Moreover, the Turkish lira is depreciating again, threatening to reach December 2021 levels. The lira depreciated 10% between 31 January and 14 March alone, reaching 14.81 TRY per USD. Noting previous trends, the depreciation may be followed by a further increase in bread prices and reduction in bundle weights, which may only be further exacerbated by a reduction or cessation of the Turkish food imports, particularly flour and wheat, against the backdrop of the conflict in Ukraine. Additionally, affordability may be greatly reduced if wages are not corrected to accompany inflation as food prices increase, particularly following reports by local and media sources of traders hoarding food items.^{29,30} However, noting the above, both SSG and SIG have taken measures to mitigate the impact of the emerging food security crisis, with a particular focus on wheat/flour/bread and considering the ongoing crisis.

Syrian Salvation Government

In response to the initial bread shortages last year, the General Shura Council held a meeting with the Ministry of Economy and Resources in November 2021, in the presence of Hay'at Tahrir al Sham (HTS) leader Abu Mohammad al Jolani; the attendants launched a 3-month bread subsidization programme (estimated at \$3 million), which reportedly supported between 35 and 40 bakeries in the area,³¹ fixing the price of a bread bundle at 2.5 TRY per 600g.

However, local sources indicate that the proposed subsidization programme is no longer active, despite the SSG's official statements of plans to extend it to all bakeries in Idleb and western Aleppo countryside in 2022.³² Subsidization programmes are costly, and it remains unlikely that the SSG will be able/willing

24 7al.net. [?من وراء تقليص وزن ربة الخبز وإيقاف بيع المدعوم منها في إلب](#). March 2022

25 Enab Baladi. [محلّي الباب: يرفع سعر ربة الخبز المدعوم إلى ليرتين تركيتين](#). December 2021

26 The New York Times. [Many Turks Can't Afford Bread, and Bakers Can't Afford to Make It](#). December

2021

27 SyriaTV. [لماذا انخفض إنتاج القمح بإدلب إلى أقل من نصفه](#). July 2021

28 Enab Baladi. [خزان القمح فارغ. السوريون على أبواب مجاعة](#). December 2021

29 Baladi News. [ارتفاع كبير بأسعار المواد الغذائية والحديد يريف حلب](#). March 2022

30 Enab Baladi. [وعود ومبررات متضاربة. أزمة السكر مستمرة في إلب](#). March 2022

31 Enab Baladi. [دعم الأفران وخفض قيمة ربة الخبز شمال غربي سوريا](#). November 2021

32 iMMAP, [The Current Status of Social Support in Syria](#). January 2022

to sustain them.³³ In fact, local sources indicate that the provision of subsidized bread by SSG-affiliated bakeries has already been suspended in Idlib city, and other localities within the governorate are expected to follow suit in the near future. This decision is likely to spark public unrest and further discontent with SSG/HTS across the governorate.

The conflict in Ukraine is projected to have a direct impact on northwest Syria, according to the Director of Public Relations at the SSG's Ministry of Economy and Resources, Hamdo al Jasem, who stated that around 90% of wheat imported from Turkey is of Ukrainian origin.³⁴ There is a shortage of information surrounding the procedures governing the import of wheat/flour through Turkey, with anecdotal evidence pointing to Syrian importers being closely affiliated with HTS' economic network. In this regard, local sources indicated that traders who wish to import from/via Turkey should obtain a merchant's card from Idlib's Chamber of Commerce (at a cost of \$400, renewed every four months); the same sources added that an import license is also required, but they were neither able to confirm its cost nor the value of other customs taxes.

Aside from its roles in bakery registration and price regulation, the SSG has been actively involved in supporting local wheat production within its territories. With the main economic challenge facing local farmers being increased production costs, the SSG's Ministry of Agriculture and Irrigation has launched a series of initiatives to counter this issue through distributing seeds, fertilizers, and pesticides at lower-than-market-rate prices. The In-kind Loan Project, whose second phase was launched by the Ministry on 3 March, is one example; the project supports 1,912 farmers, covers an area of 7,484 hectares, and has distributed 1,797 tonnes of urea fertilizer and 6,516 litres of pesticides.³⁵ Local sources added that the SSG buys wheat from farmers at a price of \$330 per tonne, a generally accepted price. While such projects are essential to encourage farmers to sustain their activities, the insufficient levels of production to cover the northwest's needs add to the rising rates of food insecurity in SSG-areas.

The high level of insecurity in southern rural Idlib and the Al-Ghab Plain, both areas of fertile lands, due to constant shelling by the Syrian government and its Russian allies, regular exchanges of fire with armed opposition groups and unexploded mines and bombs on agricultural land has meant fields lying unfarmed and unused.^{36,37} Additionally, there have been reports that pro-government militias in the western Al-Ghab Plain have threatened to shell harvesters whose owners refuse to pay a protection fee, bringing up harvesting costs and denying many farmers the ability to harvest their crops.³⁸ Such occurrences are likely to continue as long as Idlib's southern countryside remains a major frontline demarcating boundaries between government-controlled and SSG-controlled zones.

Despite the difficulties facing SSG-held areas in relation to food security, local councils and humanitarian organizations have been coordinating their efforts to provide affordable bread bundles at a time when local purchasing power is weakening. While some organizations (mainly Turkish) provide free bread for IDPs at the Syrian-Turkish border area in northern Idlib,³⁹ others support bakeries by providing free flour or subsidized fuel to reduce production costs and in turn offer bread at lower-than-market-rate prices.⁴⁰

³³ Middle East Institute, [The Economics of Hayat Tahrir al-Sham](#)

³⁴ Enab Baladi, [النار في كيبف الحصاد في دمشق](#), March 2022. It is worth noting here that SSG areas also receive Turkish wheat, which according to local sources, has been causing digestive problems.

³⁵ Syrian Salvation Government Official Website, [خطوات مهمة تتخذها وزارة الزراعة لدعم زراعة القمح في المناطق المحررة](#). March 2022

³⁶ Reliefweb, [Humanitarian Needs Overview - Syrian Arab Republic](#). March 2021

³⁷ AISouria, [قنابل موقوتة في إدلب. مخلفات القصف تهدد استقرار السكان وتحرمهم أرزاقهم](#). September 2021

³⁸ Humanitarian Access Team (HAT), [Weekly Report \(28 May - 3 June 2021\)](#)

³⁹ Daily Sabah, [Turkish NGOs Extend Help to Those in Need in NW Syria](#). January 2022

⁴⁰ [The Current Status of Social Support in Syria](#)

Syrian Interim Government

While the majority of SSG's wheat/flour needs are imported from/via Turkey, Ali Obeid, director general of bakeries in the SIG's General Organization for Grains stated that areas lying under the control of the Syrian Interim Government (SIG) are largely dependent on relief aid for their needs, with relief flour accounting for around 70% of the region's consumption.⁴¹ According to local sources, the Disaster and Emergency Management Presidency (AFAD), a Turkish organisation which oversees aid distribution, has been the major distributor of relief flour and other types of aid in SIG areas.⁴² AFAD has provided relief flour for both public local council bakeries and contracted private bakeries since 2018, but local sources indicate that its support has narrowed, favouring the former.

At this time, it remains unclear whether AFAD's assistance will be reduced in the northwest, especially following the Turkish government's decision to ban food exports, and instead focused more on aid within Turkey – the export ban does not include flour, nor does it apply to commodities that pass-through Turkey as transit. The uncertainty surrounding AFAD's support is further exacerbated by the poor levels of local wheat production in SIG areas, which reportedly covers only an estimated 30-35% of the region's needs.

The main challenges facing farmers in northern Aleppo are the increasing production costs and the poor quality of agricultural inputs,⁴³ and the negative effects of years of drought in the region.⁴⁴ During the 2021 season, local sources stated that the General Organization for Grains purchased wheat crops from local farmers at a price of \$190 per tonne for the soft wheat used for bread (the figure rises to \$200 per tonne for hard wheat). The local harvest is usually processed by SIG-affiliated mills into flour, which is later sold to public local council bakeries and contracted private bakeries, which provide bread at subsidized prices.⁴⁵ However, local sources report that the increase of 43% in production costs and the different rates of subsidization has resulted in bread price discrepancies across SIG territories.⁴⁶ Additionally, merchants are taking advantage of these price discrepancies, taking flour from areas with higher subsidization rates to areas with lower rates, where it is sold at profitable prices.⁴⁷ Local wheat production in SIG areas is therefore far from sufficient for the region's consumption needs, and significant declines in relief flour will put more pressure on the SIG's strategic reserves.

Regarding imports, around 90% of flour in SIG areas is imported.⁴⁸ Turkey's involvement in the import of Syrian wheat is also evident here, with sources indicating that the Turkish Grain Board (Toprak Mahsulleri Ofisi) is authorized to purchase wheat crops directly from farmers in northern Aleppo, at prices negotiated with the SIG,⁴⁹ although this is yet to be confirmed. Import procedures in SIG areas are more transparent than those in SSG areas, perhaps because SIG's governance is more institutionalized; however, this may also be the case due to the comparably higher level of coordination

⁴¹ Enab Baladi, [خزان القمح فارغ.. السوريون على أبواب مجاعة - عنب بلدي](#), May 2021

⁴² To give an idea of Turkey's influence on aid flows in SIG areas, local sources indicated that Turkish governors in provinces adjacent to northern Aleppo (Kilis Province for example) exercise direct control over aid distribution and can withdraw working licenses from humanitarian partners who fail to comply with their directives.

⁴³ Syria TV, [أسوأ موسم للقمح في سوريا منذ خمسين عاماً.. تحديات ومقومات الإنتاج الزراعي](#), December 2021

⁴⁴ Humanitarian Access Team, [DROUGHT, POLLUTION AND THE EUPHRATES Measuring agricultural water stress in northeast Syria](#), August 2021

⁴⁵ Syria TV, [أزمة خبز وشيكة.. ما حلول المؤقتة والمجالس لتوفير المادة الرئيسية لدى السوريين](#), December 2021

⁴⁶ Local sources report that the cost of producing one ton of bread, in Azaz for example, has increased in the last three months from \$420 to \$600

⁴⁷ [أزمة خبز وشيكة.. ما حلول المؤقتة والمجالس لتوفير المادة الرئيسية لدى السوريين](#)

⁴⁸ Imported flour here includes both relief flour provided by AFAD and humanitarian organizations and the flour purchased by private merchants (known locally as 'free flour'). The price of free flour, according to local sources, is 475 USD per tonne.

⁴⁹ Robert Schuman Centre for Advanced Studies, [The Recovery of the Local Economy in Northern Aleppo Reality and Challenges](#), March 2021

with local councils, which also tend to be more empowered in terms of resources and decision-making than their counterparts in SSG areas.

Local sources indicate that major local councils (Afrin, Ar-Ra'i, Al Bab, A'zaz, Jandairis) have their own chambers of commerce. Merchants who wish to import from/via Turkey ought to apply for a commercial record, which costs a total of \$2,200 and is renewed on an annual basis. Traders still must pay import and customs taxes, even after obtaining a commercial record, while the same sources added that local councils have access to border crossings within their respective areas of administrative jurisdiction.⁵⁰

According to the SIG's decree on cross-border customs taxes, which has been applicable since January 2022, merchants ought to pay 80 TRY per tonne of Turkish wheat and 55 TRY per tonne of transit wheat. As for flour, the respective figures are 60 TRY and 40 TRY.⁵¹ Yet, it is worth noting here that since Turkey's recent ban on the export of agricultural outputs (including wheat), local sources state that Turkish exports of wheat are not being admitted to SIG areas via the Bab al Salameh and Ar-Raqqa crossings.

POLICY-MAKING STRUGGLES IN NORTHWEST SYRIA

SIG and SSG policies were of a localized nature, consisting of a combination of steps taken by relevant SSG/SIG institutions (grain supply and trade corporations), local councils, and relief organizations to support food security in the northwest.

However, efficient policymaking is hindered by a set of structural variables that are likely to remain in the absence of a comprehensive political resolution for the conflict in Syria. First and foremost, the economy of the SSG and the SIG controlled areas have become overwhelmingly dependent on Turkey.⁵² This holds true both in terms of Turkish imports and other commodities that enter the northwest via border crossings, in addition to both administrations' adoption of the Turkish lira, which has been struggling with recent devaluations. The disruption or cessation of Turkish imports into northwest Syria for any reason is therefore likely to have a negative knock-on effect to supply and prices given its economic dependence.

Secondly, since the SIG and SSG are not internationally recognized administrations, they are unable to build proper diplomatic relations, apply for loans, and receive significant economic assistance. Consequently, their resources are severely limited and insufficient for long-term economic planning. Moreover, the relative state of political and security instability which characterizes the northwest (perhaps more pronounced in SSG-controlled areas) deters investment opportunities, impedes economic growth, and may force major stakeholders to prioritize resource allocation into the security/military sectors rather than productive economic sectors and/or social support programmes.

The flow of humanitarian aid into northwest Syria (this may be more the case in SIG-controlled territories) is also affected by regional diplomatic fluctuations; tensions between Turkey and other regional actors (Gulf Cooperation Council countries for example) which provide funding and aid may cause temporary or permanent suspension of certain projects. This politicization of aid can have negative humanitarian costs and only compounds the effects of the drought and the conflict on food security.

⁵⁰ For example, local merchants in A'zaz utilize Bab al Salameh Crossing; those in Ar-Ra-ee trade via Ar-Ra-ee Crossing; those in Al Bab can trade through either Ar-Ra'ee or Jarablus Crossings; and merchants in Afrin use Alhammam Crossing.

⁵¹ The aforementioned customs rates apply to all border crossings with Turkey (Bab al Salameh, Ar-Ra-ee, Jarablus, Ras al Ain, Tel Abiad, Alhammam).

⁵² Enab Baladi, [Incomplete Attempts to Revive Northern Syria's Economy](#) .December 2020

HUMANITARIAN IMPACT

Steep Price Increases

The inability of the SSG and SIG to set up and implement a fully-fledged food security policy is likely to have adverse effects on Syrian citizens' ability to afford necessities as the conflict in Ukraine continues. The price of essential food items has already significantly increased since the start of the conflict, reaching up to 67% and 22% in SSG and SIG areas respectively (shown in table 1 and 2). Moreover, the price increase was reportedly accompanied by a shortage in sunflower oil, sugar, and flour in some northwest communities.

Price increases have been attributed to two main reasons: Local sources identified trader monopolization as being the primary reason behind the recent price increases. The availability of food items such as sugar and sunflower oil was reduced not necessarily to a lack of supply, but rather traders hoarding the items in preparation for supply issues, at which point they would be able to sell their goods at far higher prices later on – this is particularly the case with Ramadan approaching, when prices are driven up further.^{53,54} Additionally, the suspension of Turkish food exports (a large percentage of which comes from Ukraine) on 8 and 10 March reduced supply, further increasing prices. Local sources reported that food imports had ceased on Turkish border crossings with the northwest for these two days following the Turkish ban, before food imports in transit through Turkey were again allowed through.

ITEM	FEBRUARY 17 (PRICES IN TRY)	MARCH 10 (PRICES IN TRY)	% CHANGE
Bulgur (1kg)	9	13	44
Short-grain rice (1kg)	13	15	15
Long-grain rice (1kg)	17	25	47
Sugar (1 kg)	11.5	15	30
Sunflower oil (1 L)	24	40	67

Table 1: Price increase of essential food items in Sarmada

Item	February 17 (Prices in TRY)	March 10 (Prices in TRY)	% CHANGE
Bulgur (1kg)	9	11	22
Short-grain rice (1kg)	18	19	7
Long-grain rice (1kg)	13	13	0
Sugar (1 kg)	12	14	17
Sunflower oil (1 L)	23	28	22

Table 2: Price increase of essential food items in Azaz

⁵³ Baladi News. [ارتفاع كبير بأسعار المواد الغذائية والحديد يريف حلب](#). March 2022

⁵⁴ Enab Baladi. [وعود ومبررات متضاربة.. أزمة السكر مستمرة في إدلب](#). March 2022

Residents, who are already barely able to provide their necessities, complained about the recent price increases and the additional financial burden which it brings with some saying that it “occurred in record time” following the start of the conflict in Ukraine. Others expressed concerns that criminality in the form of theft, kidnapping for ransom, and armed robbery will increase because of citizens' increased difficulty to make ends meet.

INSUFFICIENT FLOUR AND FUEL RESERVES

Syrian Salvation Government

Local sources report that flour reserves are in short supply in SSG areas with estimates of their ability to provide citizens' daily bread needs ranging between one and six months. The replenishment of these reserves may be hindered due to the increased cost and/or absence of flour imports, reduced relief flour, and the insufficient local wheat production which may worsen if climatic conditions prove unsuitable (in the case of continued drought, for example).

Fuel reserves are also limited. Local sources reported that fuel reserves are only sufficient to last one to two months, largely due to insufficient storage facilities. The SSG has refrained from storing fuel out of fear that they would be hit by Syrian government or Russian bombardments – in February, it was reported that a Russian bombardment hit a fuel market in Termanin resulting in an explosion which killed four people. Local sources added that the fuel which is purchased and oil that is refined is used directly for electricity use and industrial production.

Syrian Interim Government

The situation is similar in SIG areas. SIG prime minister, Abdel Rahman Mustafa, stated on 12 March that wheat reserves are sufficient to last six months until September 2022.⁵⁵ However, local sources estimate true reserves to be sufficient for just one month. Local councils reportedly met with humanitarian organizations and Turkish governors of neighbouring provinces asking for their assistance in setting up an emergency plan to be implemented before the end of Ramadan, when flour reserves are expected to run out.

Fuel importers have stated that fuel supply has been affected because of the conflict in Ukraine, expressing fears that Turkey might eventually ban fuel and gas exports. Fuel reserves in SIG areas are practically non-existent with local sources reporting that they would only be sufficient for one week if imports were stopped.

INCREASED FOOD INSECURITY

The price increases because of continued conflict in Ukraine, coupled with insufficient reserves, are likely to result in increased food insecurity if food imports are halted and additional resources for food, agriculture, and cash programming are not secured. Food insecurity in northwest Syria is already present, particularly in SSG and Euphrates Shield areas in which communities registered high levels of food need (Figure 3). As shown, 64.7% and 56.2% of communities in SSG and SIG areas respectively

⁵⁵ Syrian Interim Government. [عبد الرحمن مصطفى رئيس الحكومة السورية المؤقتة: القمح يكفينا حتى سبتمبر ولا يدعمنا سوى تركيا](#). [وحوكومتى غير مدعومة من الاتحاد الأوروبي أو أي دولة أخرى](#). March 2022

have reported either high (50–70% of the population) or very high (over 70% of the population) food need as of February 2022.⁵⁶

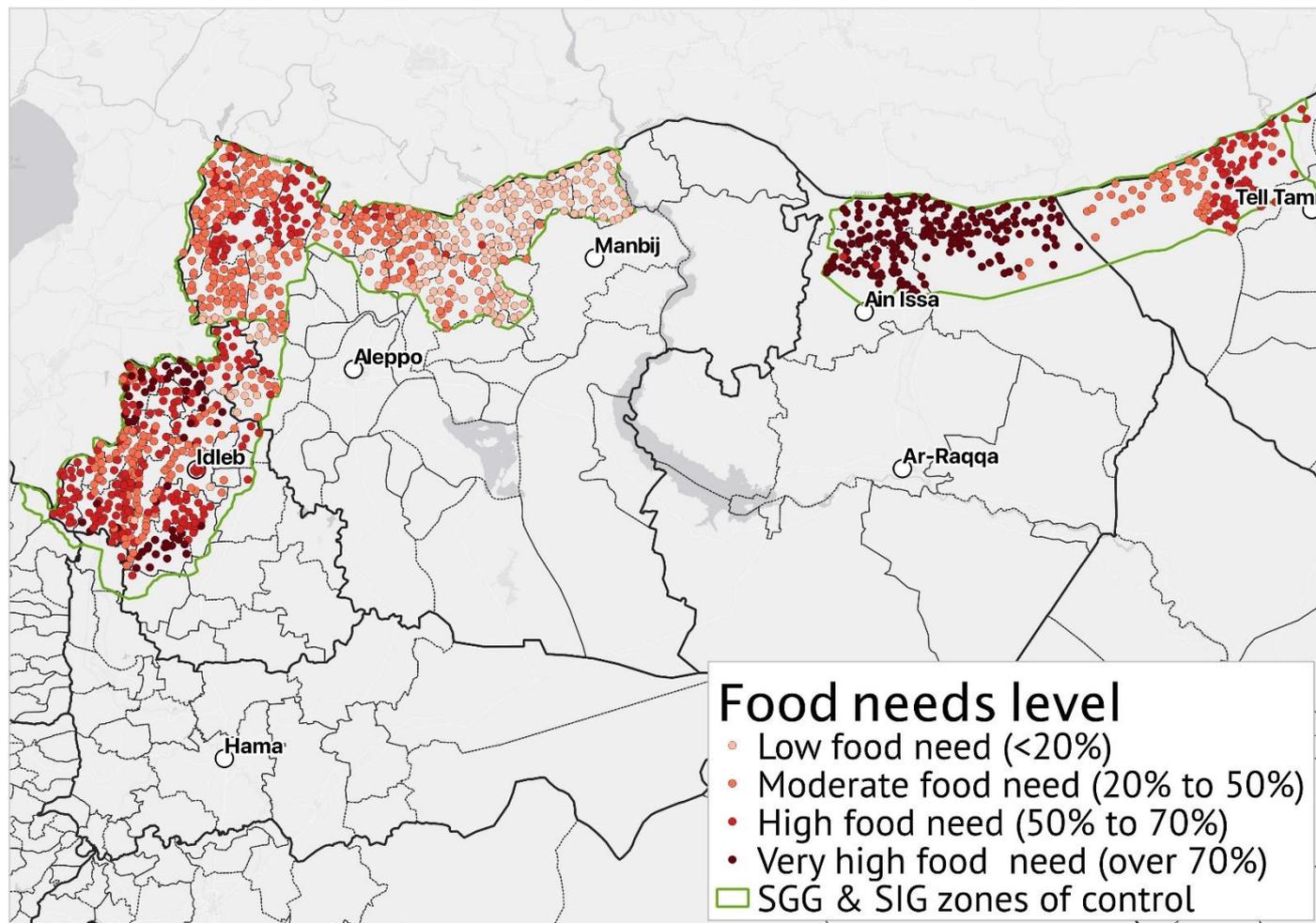


Figure 3: Resident/IDP food need among communities in SIG/SSG zones of control between Sept 2021-Feb 2022.

Food needs become more acute when it comes to bread. Figure 4 shows 89.5% of communities in SSG areas have already registered bread as a priority food need for both resident and IDP populations, indicative of the bread needs which already exist in the area, mainly due to the high prices of bread and other food items.⁵⁷

The number is likely to increase and inaccessibility to food intensify as the amount of flour reserves diminish, further increasing the prices of such items due to the higher demand on them amid strained supply lines.

⁵⁶ Data obtained from HNAP's Mobility & Needs Monitoring dataset. Communities were categorized according to the average proportion of the population in food need (averaged September 2021 to February 2022 statistics).

⁵⁷ Data obtained from HNAP's Mobility & Needs Monitoring and REACH's Humanitarian Situation Overview of Syria (HSOS) datasets. Communities were categorized as in high food need if the average proportion of the population in food need exceeded 50% (averaged September 2021 to February 2022 statistics). Communities were categorized with bread as a priority food need if they were assessed by REACH from September 2021 to February 2022 and reported bread as a priority need in 3 or more of the monthly assessments (consecutive or nonconsecutive).

HAT has found preliminary results showing the relationship between bread and food need which will be further explored in later studies. As seen in Figure 4, results indicate that food need increases 8.3% for every \$1 increase in the flour prices, 6.2% for every \$1 increase in the wheat prices, and 6.1% for every 10 TRY increase in flour prices.

Moreover, increases in diesel prices have a passthrough effect on food items in the northwest. Diesel is an essential fuel source for transportation and machinery used in bread production. HAT found that for every one percent increase in diesel prices, unsubsidized bread prices increase by 1.27%, bulgur increases by 1.12%, and wheat flour increases by 0.26% among other food items (shown in Figure 5).

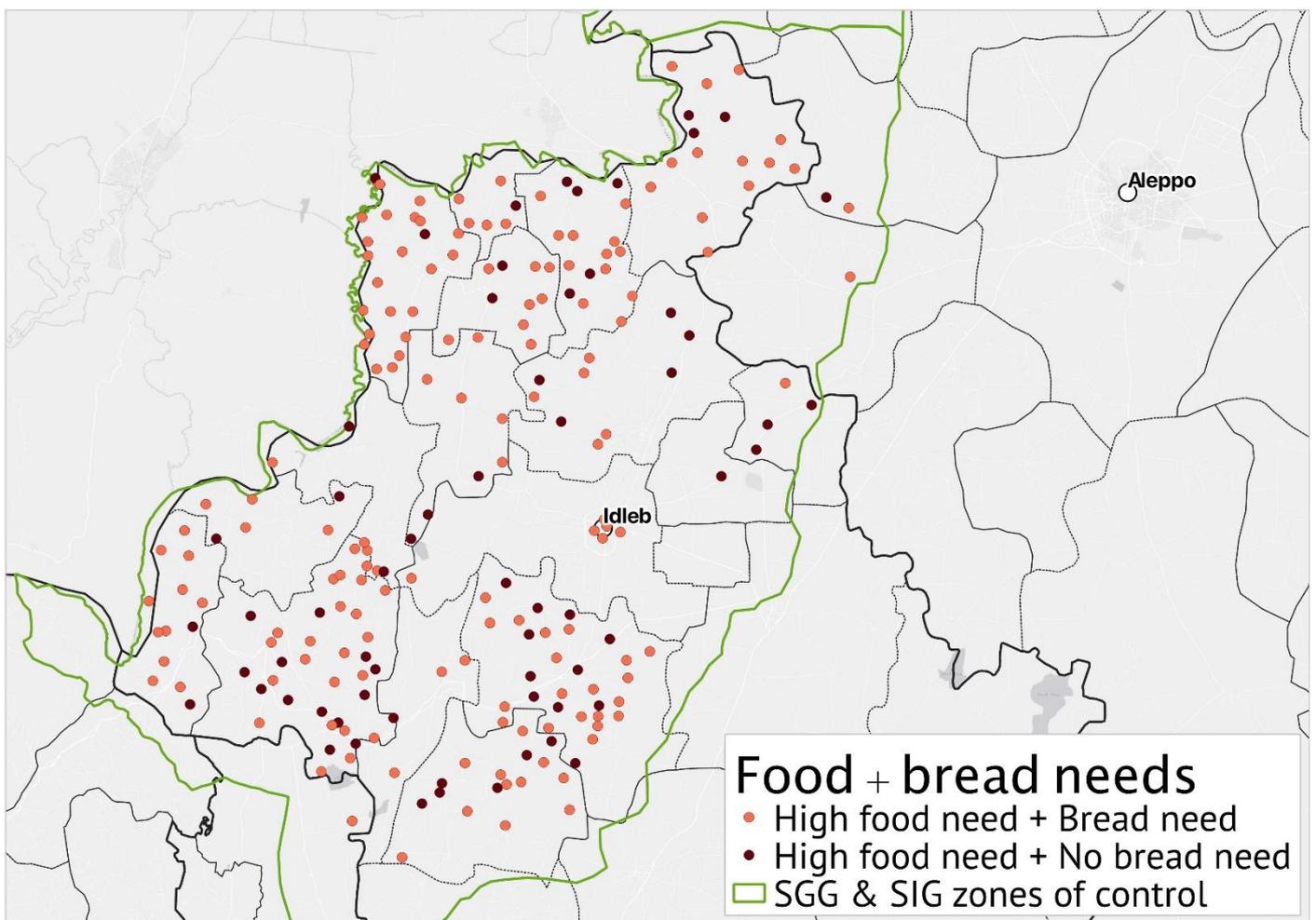


Figure 4: Bread reported as a priority food need for residents/IDPs among communities with a high resident/IDPs food need (>50%).

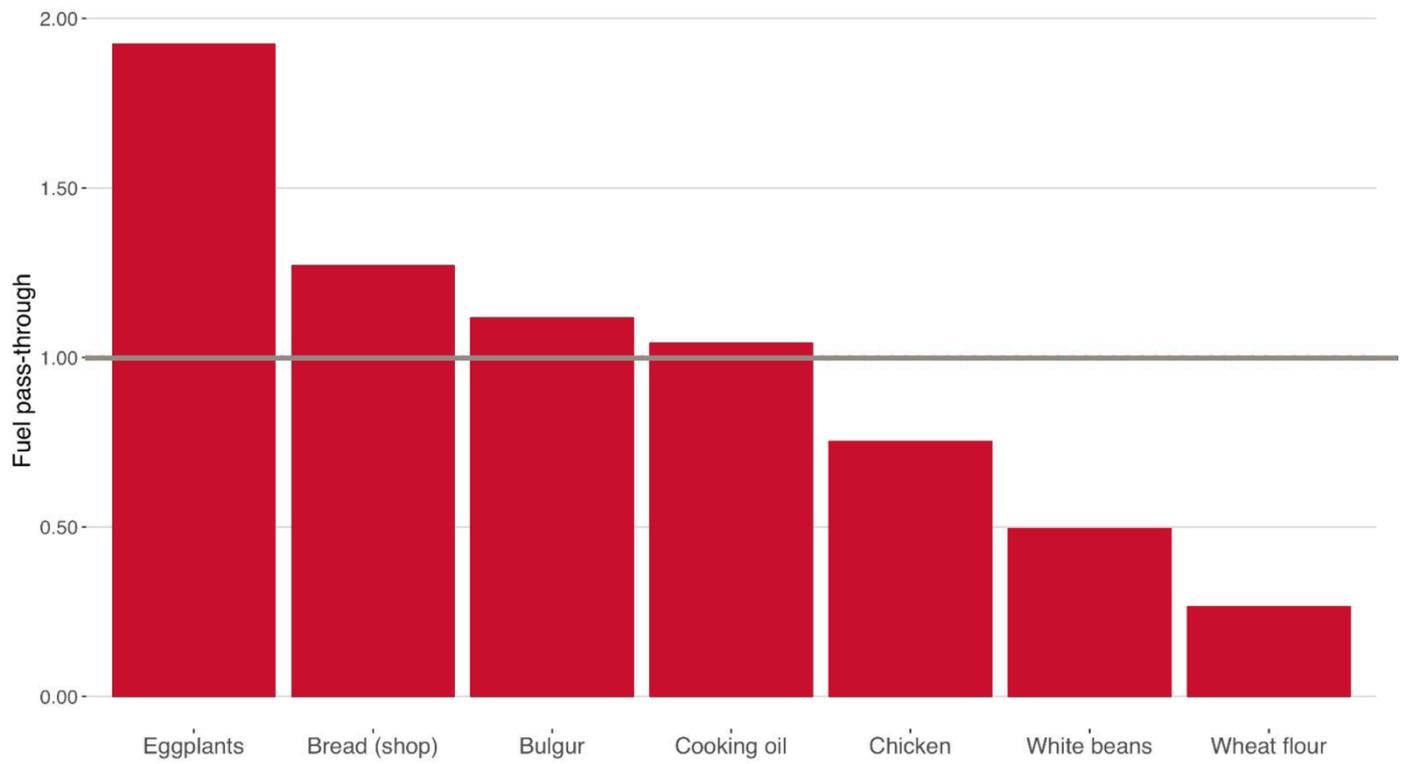


Figure 5: Percent increase in the food item prices for every one percent increase in diesel prices in Idleb

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ABOUT THE HUMANITARIAN ACCESS TEAM (HAT)

The Humanitarian Access Team (HAT) was established in Beirut in March 2015 in response to the collective challenges facing the remote humanitarian response in Syria. HAT's most important function is to collect and analyse disparate data and information. Since 2015, HAT analysis has provided a forward-looking template for international interventions in Syria, and facilitated an increasingly adaptive, integrated, and ultimately impactful international response to the conflict.



