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Agriculture Input and Commodity Bulletin

March 2021



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Key Highlights

- The continued shortage of fuel was a main challenge for people in March 2021. It affected all of life aspects across all monitored governorates. The significant lack of fuel continued to affect most day-to-day errands and access to energy for heating, travel and production purposes. The shortage of fuel, particularly diesel, affected most agricultural field operations especially irrigation, underground water extraction and transportation. If the shortage of diesel persists, it is most likely going to affect mechanical harvest operations expected in May and June 2021.
- The COVID-19 cases have increased in March with 3 321 confirmed cases. The cumulative total number of confirmed cases reached 18 909 cases as of 31st of March 2021. Confirmed cases in March represented the second highest monthly caseload since the beginning of the pandemic in Syria with 172 cases being confirmed on the 23rd of March 2021, based on WHO reports.
- The continued depreciation of the local currency has resulted in volatility in the exchange market. The Syrian pound continued to slide in the informal exchange rate market and reached SYP 4 000/1 USD in March 2021. This subsequently resulted increase of agricultural inputs prices,

further limiting access for vulnerable farmers’ in some governorates, mainly cattle feed, top dressing and nitrate fertilizers, herbicides, and diesel fuel. There is still a need to address the prevailing economic hardships and limited access to agricultural inputs by most farming families across the country in a holistic and multipronged approach. Taking into consideration that the government’s subsidized inputs are unable to meet the farmer’s full requirements. These constraints were further worsened by the Covid-19 impact on supply chains, since importation and exportation of most agricultural inputs and commodities has been affected respectively.

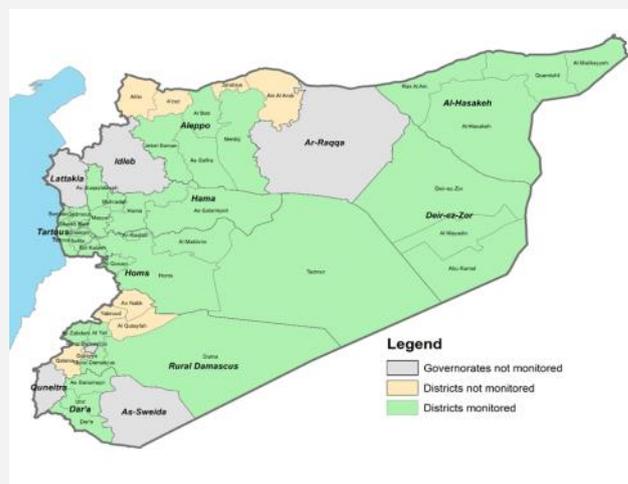


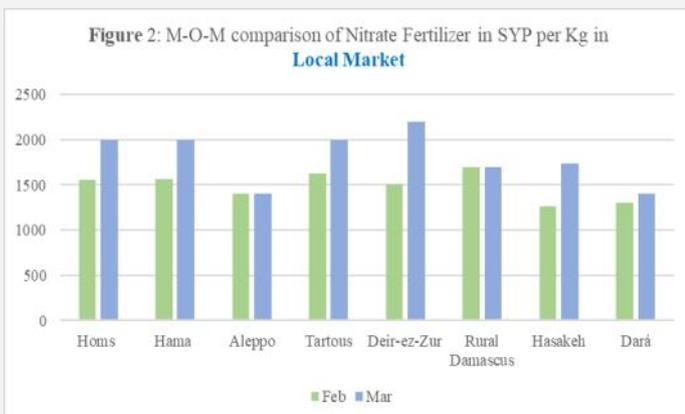
Figure 1: Markets Monitored by FAO on a monthly basis.

DISCLAIMER: The information in this bulletin comes from monthly market surveys conducted informally by FAO field staff. While FAO Syria strives to provide accurate and timely early warning information, there may be slight unintended technical or factual inaccuracies. Decisions based on information contained herein are the sole responsibility of the reader.

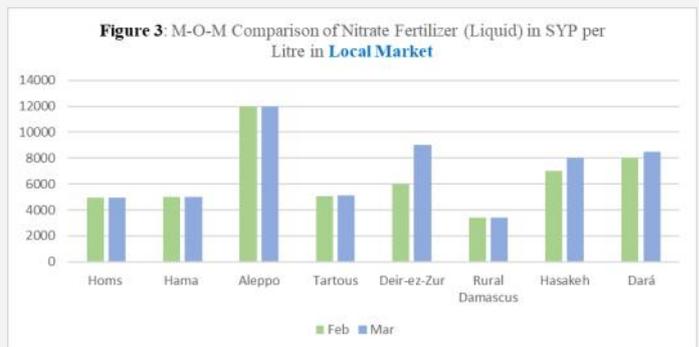
Agriculture Commodity and Input Prices

Nitrate fertilizers

The Agriculture Bank used to provide each farmer with granular nitrate fertilizer at a supported price of 200 SYP per kg. The agriculture bank has faced significant challenges in stocking nitrate fertilizer in February and March 2021 across the governorates. The nitrate fertilizers shortages were observed in Homs, Hama, Tartous and Hasakeh. Granular fertilizer remains available at the Agriculture bank in Aleppo, Deir-er-Zor and Dar'a and the price remained constant m-o-m. Due to the shortage and limited availability of granular nitrate fertilizer at the Agriculture Bank, most farmers have been forced to rely on the local market to address the shortage and meet the significant gap. In governorates where granular top dressing fertilizer is available, the Agriculture Bank provides almost a third of the farmers' needs, forcing them to purchase the rest of their requirements from the local market at an average price of 1 488 SYP per kg (18 percent m-o-m increase). The selling price increased significantly in Deir-ez-Zor and Hasakeh governorates (representing a 47 percent and 38 percent m-o-m increase). The remaining governorates also recorded an increase in the average selling price with a 21 percent m-o-m increase (figure 2). The continued fall of the local currency against the USD in March 2021 is worsening the already dire situation since it is resulting in significant market price volatility for agricultural inputs purchased from local markets and this continues to affect the farmer's capability in covering their needs and field requirements. Top dressing fertilizer is essential for good leaf and general plant growth and ultimately the yield but also importantly for attaining good protein levels and the shortage of nitrate fertilizer is affecting the crop properties, in some governorates.

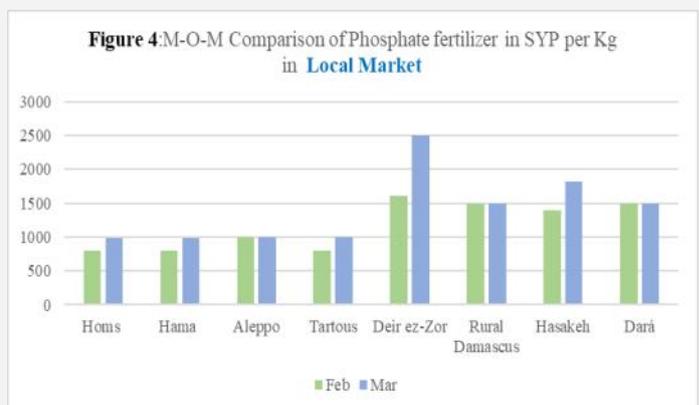


The average selling price of liquid nitrate fertilizer was 5 206 SYP per litre in March 2021 and a 19 percent m-o-m decrease was noted from February 2021. The average selling price in Deir-ez-Zor increased significantly reaching 8 000 SYP per litre (50 percent m-o-m increase) and in Hasakeh the selling price recorded 8 000 SYP per litre (14 percent m-o-m increase) as highlighted in figure 5, while the price of the same substance remained constant in Homs, Hama, Aleppo and Rural Damascus. The liquid nitrate fertilizer is more expensive than the granular type and FAO will closely monitor the price of this commodity in the coming months as demand is increasing particularly in the last two months before the harvesting time.



Phosphate fertilizers

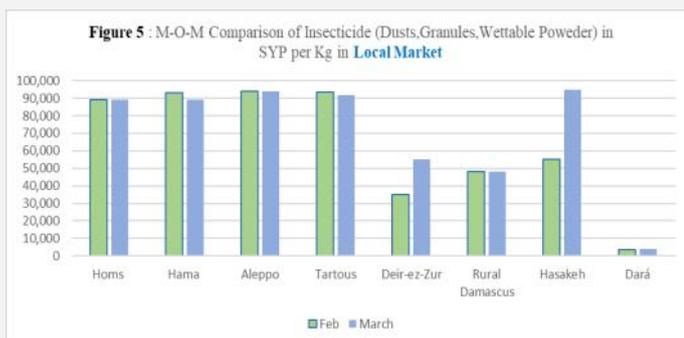
Phosphate fertilizer is still available at the Agriculture Bank at a subsidized price of 240 SYP per kg. Phosphate fertilizer is also still available in the local markets and the price reached 1 409 SYP per kg (20 percent m-o-m increase) in March. The highest price of phosphate fertilizer from the local market was recorded in Deir-Ez-Zor at 2 500 SYP per kg (56 percent m-o-m increase), while the lowest price was recorded in Hama, Homs at a price of 980 SYP per kg, highlighting a 23 percent m-o-m increase (figure 4).



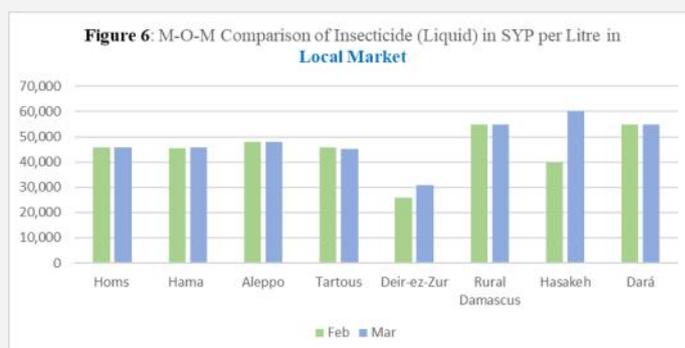
Pesticides

Crop-protection agro-chemicals (i.e. pesticides), which include insecticides, fungicides and herbicides, are available across the governorates. However, they remain generally expensive and out of reach for most farmers. The price of pesticides will negatively affect farmer's application rates, leading to a greater risk of pest and disease incidences and prevalence, which will ultimately affect production, productivity and the quality of produce of vegetables and fruits. There was a notable prevalence of the Cereal Leaf Miner, which affected a large area in Homs and the limited availability of insecticides delayed the management of the insect outbreak. Most farmers will have to rely on integrated pest management (IPM) options and tactics to minimize the reliance on expensive synthetic or inorganic pesticides. Integrated pest management is a strategy that aims at maintaining pest populations below economically damaging levels and reducing the use of toxic synthetic chemicals (i.e. pesticides). Farmers and the Food and Agriculture Sector (FAS) partners are encouraged to adopt IPM, where feasible, as this may offer ways to achieve effective long-term pest control while mitigating hazards to humans and the environment, including reducing the reliance on the expensive synthetic pesticides as earlier mentioned, with possibility of increasing the resilience of farmer livelihoods. Furthermore, most available pesticides in the local market are coming from unknown and unofficial sources and hence the quality and efficacy is difficult to verify.

Insecticides (dusts, granules, Wettable powders): These are generally available at an average price of 70 708 SYP per kg. The highest selling price was recorded in Hasakeh governorate at 95 000 SYP per kg (73 percent m-o-m increase), the change in price was significant in Deir-ez-Zor also (57 percent m-o-m increase). In Hama and Tartous governorates, a slight m-o-m decrease (i.e. 4 percent and 2 percent) was observed respectively in March 2021 as highlighted in (figure 5).



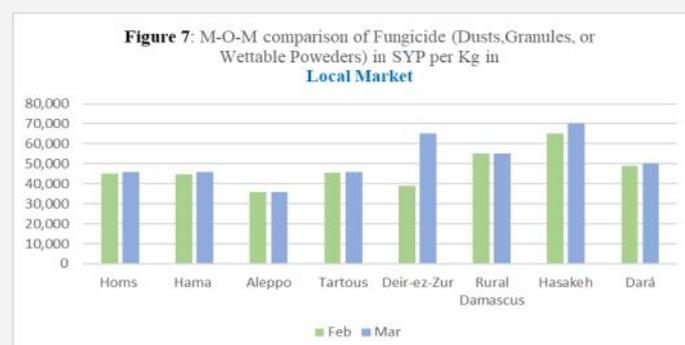
Liquid Insecticides: The liquid insecticide prices increased slightly in March 2021 (7 percent m-o-m increase), with the average selling price reaching 48 246 SYP per litre. Liquid insecticides were generally available across most of the monitored markets, the average selling prices remained constant m-o-m across Aleppo, Rural Damascus and Dará. Hasakeh governorate witnessed a significant increase in March 2021 and the price reached 60 000 SYP per litre (50 percent m-o-m increase), while Tartous governorate recorded



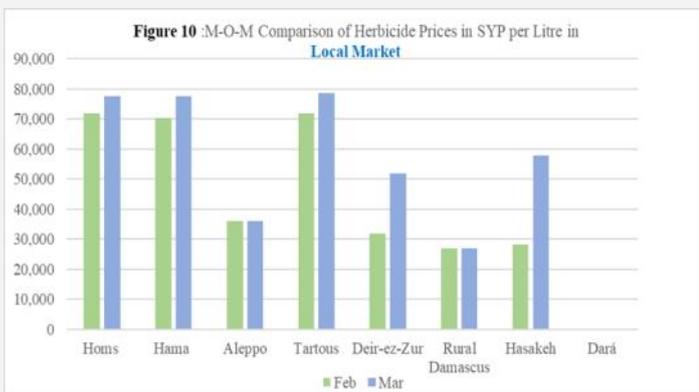
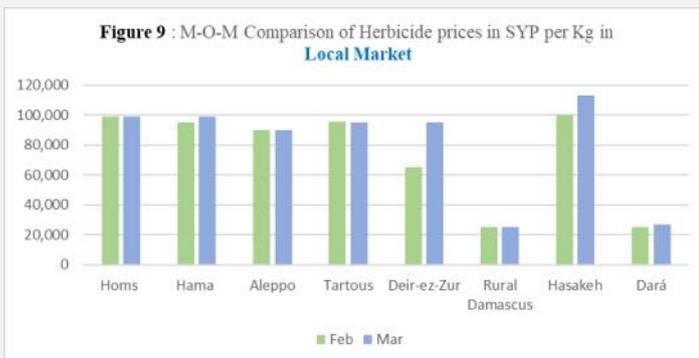
a slight 1 percent m-o-m decrease (figure 6).

Fungicides (dusts, granules or Wettable powders): Fungicides are generally available across the monitored governorates at an average selling price of 51 729 SYP per kg (9 percent m-o-m decrease). In Deir-ez-Zor, the increase in the average price was the highest recorded among the monitored governorates, with a selling price of 65 000 SYP per kg (67 percent m-o-m increase), while a slight increase recorded in Homs, Hama and Hasakeh (2, 3 and 8 percent m-o-m increase respectively). The average selling price for fungicides remained constant in Aleppo and Rural Damascus at 36 000 and 55 000 SYP per Kg respectively (figure 7).

There was a notable m-o-m increase in the average selling price of liquid fungicides in Tartous (33 percent), Hama (31 percent), Deir-ez-Zor (19 percent) and Hasakeh (17 percent). However, in Dara', Rural Damascus and Aleppo governorates the average selling prices remained constant at 80 000, 57 000 and 42 000 SYP per litre respectively (figure 8).



Herbicides: The average selling price of herbicides (i.e. dusts, granules or Wettable powders) was 80 438 SYP per kg (8 percent m-o-m increase). A slight decrease in the selling price of herbicides was recorded in Tartous governorate , while in Deir-ez-Zor governorate, a 46 percent m-o-m increase was recorded, reaching a peak of 95 000 SYP per Kg. Prices remained constant m-o-m across Rural Damascus, Homs and Aleppo governorates. Dará and Hama governorates witnessed a slight m-o-m increase (i.e. 8 and 4 percent respectively, with the selling price reaching 27 000 in Dar’a and 99 000 SYP per kg in Hama (figure 9). The liquid herbicides recorded a 21 percent m-o-m increase with an average selling price of 50 858 SYP per litre. The highest selling price continued to be recorded in Tartous governorate at 78 667 SYP per litre (9 percent m-o-m increase). Furthermore, there was a significant m-o-m increase of 105 percent of herbicide prices in Hasakeh governorate and the average selling price reached 58 000 SYP per litre in March 2021. Deir-ez-Zor also recorded a 63 percent m-o-m increase with Rural Damascus recording the lowest herbicide selling price of 27 000 SYP per kg. Prices in Dará and Aleppo governorates remained constant since February 2021 (figure 10).

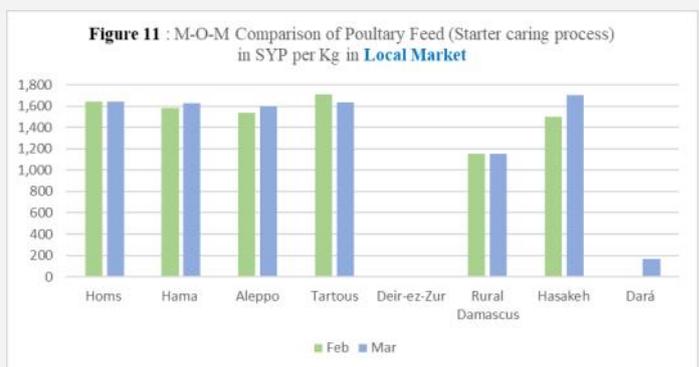


Poultry Feed: The average selling price of poultry feed for layers and egg production was recorded at 1 190 SYP per kg. This has resulted in limited availability of eggs in the local markets and access by most families in Deir-ez-Zor. It must be noted that families in Deir-er-Zor also rely on other neighbouring governorates or bordering countries to cover

their needs for eggs. Some of the eggs come into Deir-er-Zor from neighbouring countries through illegal trade routes with unverified quality and standards.

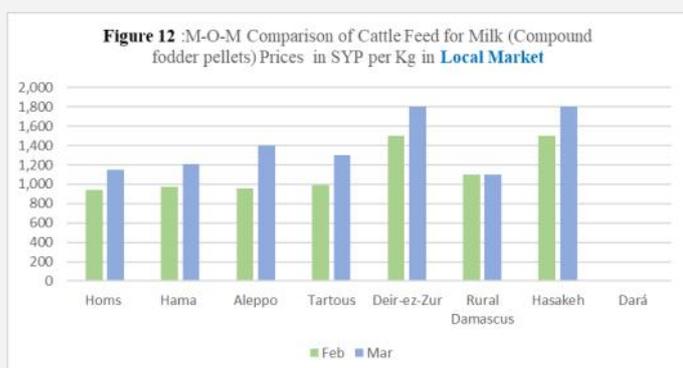
In terms of poultry feed, the layers mash selling price recorded in Hasakeh governorate reached 1 700 SYP per kg, while Rural Damascus recorded the lowest selling price 1 150 SYP per kg (figure 11).

The average selling price of broiler starter, grower and finisher mash was recorded at 1 201 SYP per kg representing an 8 percent m-o-m decrease. Hasakeh governorate recorded the highest selling price of broiler starter, growers and finisher mash at an average 1 900 SYP per Kg. Homs however recorded the lowest at 1 450 SYP per kg since February 2021.



Cattle feed The availability of cattle feed for milk production was generally acceptable in the monitored sites, with an average price of 1 220 SYP per kg recorded in March 2021 (23 percent increase m-o-m). The highest selling price was observed in both Hasakeh and Deir-ez-Zor at 1 800 SYP per kg, while the lowest price was recorded in Rural Damascus governorate at 1 100 SYP per kg, Aleppo governorate witnessed a significant increase in the average price of cattle feed for milk production with a 46 percent m-o-m increase, with the price reaching 1 400 SYP per Kg (figure 12). Cattle feed for meat production (i.e. compound fodder pellets) was available across all the monitored governorates at an estimated price of 1 161 SYP per kg. Deir-ez-Zor recorded the highest price of cattle feed, which was sold for at least 1 800 SYP per kg. Feed is the main challenge, which continues to affect the livelihoods of livestock keepers and herders, as it constitutes about 70 percent of the total costs for livestock production. However; the availability of livestock feed is fair to good but the exorbitant prices and continued price increases are significantly limiting access by most livestock farmers. production of fodder.

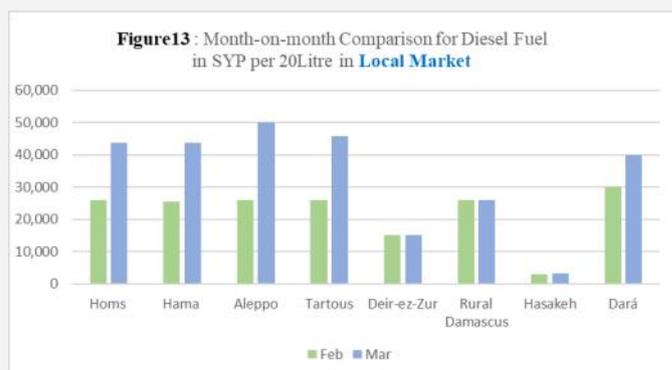
This is coupled with the economic and financial constraints that are worsening the situation. There is urgent need for sector partners to support innovative and sustainable interventions that protect livestock assets, particularly activities that result in increased availability and production of fodder.



Diesel Fuel

The Syrian government has allocated a specific quantity of diesel fuel for farmers in an endeavour to support the agriculture sector but still this quantity is not enough to cover the demand. The farmers continue to access fuel through a subsidised price of 180 SYP per litre. There was a significant m-o-m increase of 33 percent in the average diesel fuel price within the local markets, reaching 40 000 SYP per 20 litres (see figure 15). Four governorates out of eight witnessed a significant price increase in diesel fuel price for a 20 litre gallon and these governorates are Aleppo (50 000 SYP), Tartous (45 833 SYP), Hama (43 800 SYP) and Homs (43 800). The lowest price of diesel fuel remained low in in March 2021 in Al-Hasakeh at 3 167 SYP for a 20 liter gallon (figure 13).

Most farmers have to rely on expensive diesel fuel offered in the local market and black market to cover the unmet needs. The availability and subsequent price changes of fuel (i.e. diesel and gasoline) and other energy sources will be monitored continuously as this may have ripple effects on various agriculture operations, especially for irrigation in March and April 2021 April when crop water use requirements are high for wheat. The limited ability of wheat farmers to effectively irrigate their crop based on their planned irrigation schedule; will most likely affect grain filling and actual productivity of wheat and even barley, reducing the potential income. Furthermore, diesel fuel and other forms of energy are essential for groundwater extraction for irrigation purposes, transportation of products and inputs to markets, food processing and preservation. The high cost and extremely limited availability of diesel fuel, in particular, will have adverse effects on agricultural production and may affect food and nutrition security.



Wheat

The optimum time for planting winter in Syria is between mid-October to end of December, depending on whether it is under irrigation or is rain fed. If rain fed, the time of sowing also depends on the onset of rainfall and the wheat varieties' days to physiological maturity. FAO continuously monitors the prices of wheat seed beside other agriculture input, so that a comparison may be made for the prevailing wheat seed prices during peak demand and off-season. Continuous monitoring assists in analysing the price trends as mentioned above and checks on wheat seed availability as the successive winter planting seasons approach.

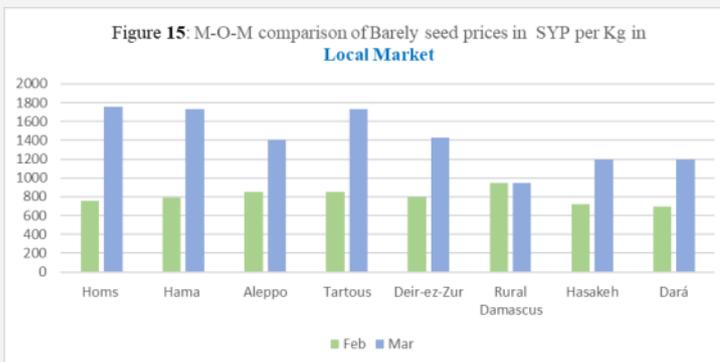
The General Organization for Seed Multiplication (GOSM) still has wheat seed in stock for 450 SYP per kg as an official price. The continued depreciation of local Syrian pound and the increase in the cost of wheat production, a change in the average selling price of wheat seed is expected to happen for the next cropping season since the government has modified the wheat grain receipt price for farmers from 450 SYP to 900 SYP per kg of wheat grain back in (month). This current context also left it is influence on local markets prices so the average of selling price for wheat seeds increased 50 percent m-o-m in March and the highest average selling prices were in Deir-ez-Zor and Hasakeh that reached 1 433 SYP per Kg with 54 101 respectively m-o-m increase (figure 14). In Aleppo, the selling price of wheat seed recorded is 1 300 SYP per kg in March 2021 (108 percent m-o-m increase) compared to 625 SYP per kg in February 2021.



Barley

The optimum time for planting barley in Syria is between early-October to mid-November, depending on the onset of rainfall and the barley varieties' days to physiological maturity. FAO continuously monitors the prices of barley seed, and other agriculture input prices, so that a comparison may be made for the prevailing barley seed prices during peak demand and off-season. Continuous monitoring assists in analysing the price trends as mentioned above and checks on barley seed availability as successive planting seasons approach.

GOSM still has in stock at an official price of 200 SYP per kg. The local market has offered barley seed at a price ranged between 950 SYP per kg in Rural Damascus to 1 760 SYP per kg in Homs governorate, with a 132 percent increase m-o-m. In Tartous and Hama governorates, there was a significant increase indicated by 104 and 119 percent m-o-m respectively, with the price in the local market reaching 1 733 and 1 730 SYP per kg in the aforementioned governorates respectively. Barley seed price reached 1 200 SYP per kg in Dará governorate. Observations have also revealed a significant m-o-m price increase of almost 66 percent in Hasakeh governorate, with the average-selling price of 1 760 SYP per kg being recorded in Homs (Figure 15).

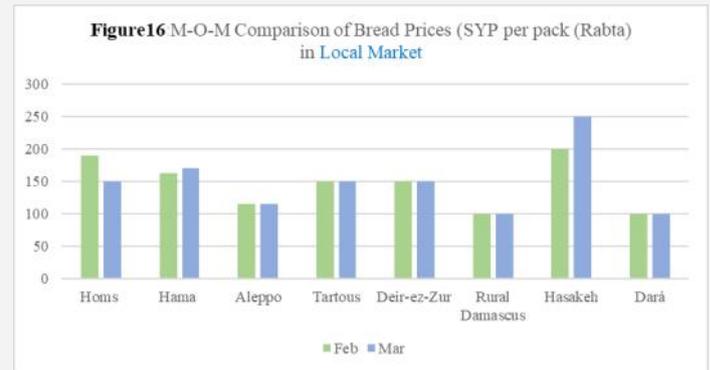


Food Prices

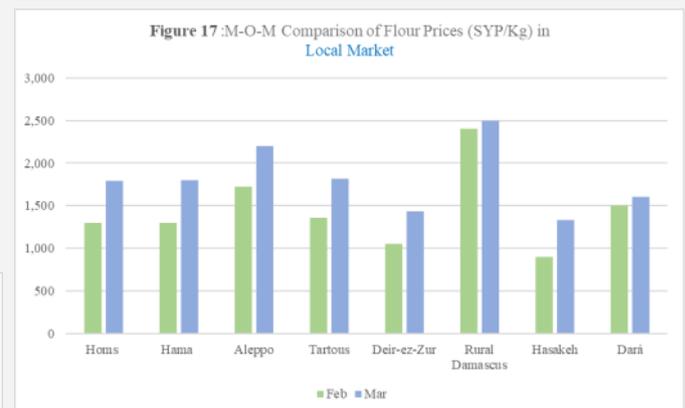
The observations in March 2021 indicate that almost all of the prices for the fifteen food items monitored generally increased in variable proportions. Sunflower recorded the highest price increase compared to the prices in January 2021, with an average selling price 7 474 for 1 litre, followed by flour and then chicken meat with an average selling price up to 1 442 for 1 Kg.

The average selling price of bread went up in March 2021 to 148 SYP per pack (1 percent m-o-m increase). The highest selling price of bread was recorded in Hasakeh governorate at 250 SYP per pack (25 percent m-o-m increase). Homs governorate recorded a 21 percent m-o-m decrease as

highlighted in figure 16.



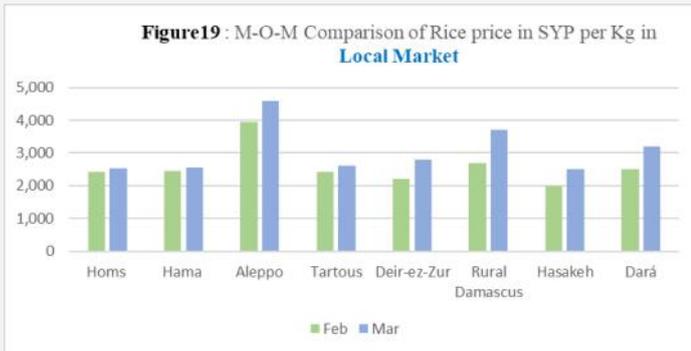
Generally, the price of flour prices increased across most governorates with an average m-o-m increase of 25 percent, with significant m-o-m increases being recorded in Hasakeh (48 percent), Homs (38 percent), Hama (38 percent) and Deir-ez-Zor (37 percent). The highest price was recorded in Rural Damascus at 2 500 SYP per kg (4 percent m-o-m increase) (figure 17).



Homs, Hama and Tartous governorates recorded a slight decrease in the average price of sugar in March 2021, with a 4 percent, 2 percent and 2 percent m-o-m decrease being recorded in the mentioned locations respectively. The prices in Rural Damascus and Dar'a governorates remained constant from February 2021 and into March 2021 but Deir-ez-Zor and Hasakeh however recorded price increases in the average selling price, reaching 25 percent and 20 percent m-o-m increase respectively (figure 18).



For rice, the price remained highest in Aleppo governorate at 4 600 SYP per kg. However, a 37 percent m-o-m increase was recorded in Rural Damascus and 27 percent m-o-m increase was noticed in Deir-ez-Zor also. In general, the average selling price of sugar in March 2021 reached 3 063 SYP per Kg representing a 19 percent m-o-m increase in the average selling price across the monitored governorates (figure 19).

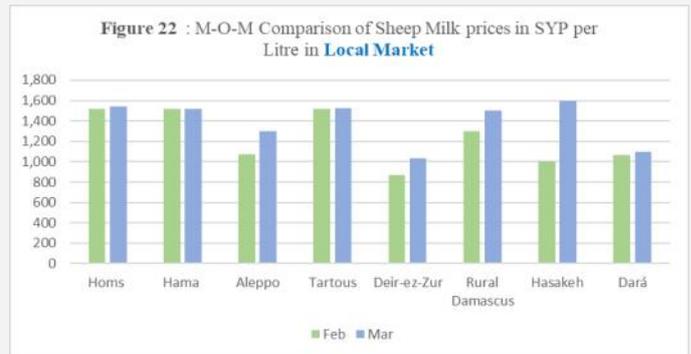
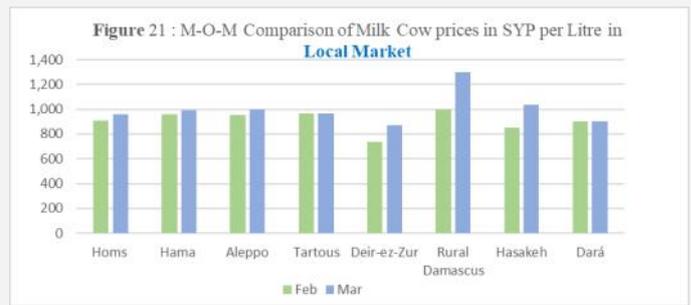


The average selling prices of eggs witnessed an increase across all monitored governorates in March 2021 with a 13 percent m-o-m increase in the average price, reaching 7 266 SYP for a crate or pack 30 eggs. Rural Damascus recorded the highest average selling price of 30 eggs, recording 7 700 SYP, while the lowest price of 6 800 SYP was recorded in Deir-ez-Zor governorate for the same amount (figure 20).

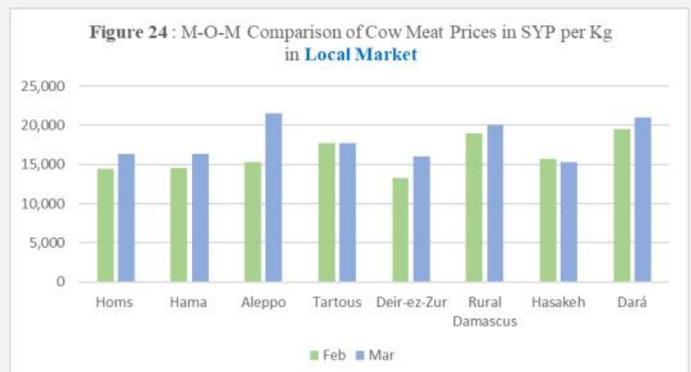


From February to March 2021, the cow milk selling price increased in Homs, Rural Damascus, Hasakeh and Deir-ez-Zor governorates by 30, 22 and 18 percent respectively. The price did not change from February to March 2021 in Tartous and Dara' governorates. The average selling price reached 1 002 SYP per litre across all the eight monitored governorates with the highest price of 1 300 SYP per litre being recorded in Rural Damascus (figure 21).

For sheep milk, the average selling price reached 1 390 SYP per litre with the highest selling price of 1 600 SYP per litre being recorded in Hasakeh governorate. This is followed by Homs, which recorded 1 540 SYP per litre, while the lowest selling price was observed in Dará at 1 100 SYP per litre (figure 22).

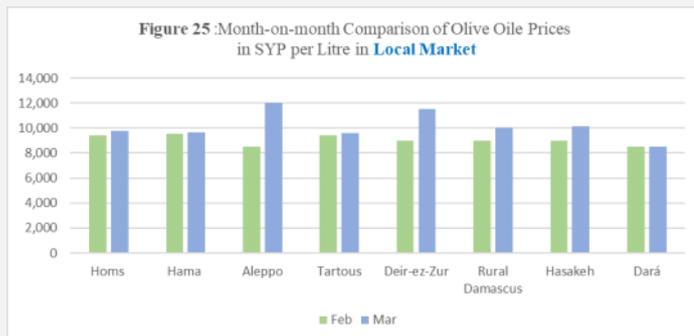


For chicken meat, the prices in Tartous, Homs and Hama decreased by 15, 9 and 9 percent respectively m-o-m. An average selling price of 6 800 SYP per kg was recorded across the eight monitored locations with a slight and average 4 percent m-o-m increase (figure 23). Sheep meat average price reached 20 371 SYP per kg (16 percent m-o-m increase). The highest price was recorded in Rural Damascus at 25 000 SYP per kg, while cow meat average prices reached 18 013 SYP per kg (11 percent m-o-m increase) and Aleppo governorate witnessed a significant 41 percent m-o-m increase, with the price reaching 21 500 SYP per kg as highlighted in figure 24.



For fish, the monthly market monitoring noticed the highest average selling price of 20 000 SYP per kg in Rural Damascus. This high and exorbitant price will further limit access and consumption of fish by most vulnerable and food insecure families, resulting in reduced dietary diversity.

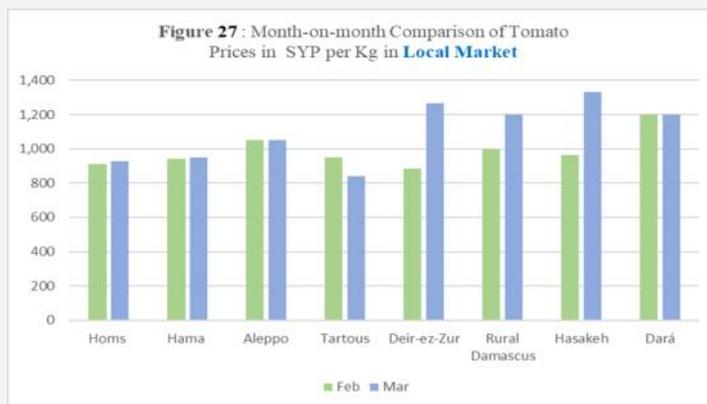
Olive oil price increased by 12 percent in March 2021. The average selling price of 10 151 SYP per litre was recorded across the eight monitored governorates. Aleppo governorate witnessed a sharp increase (41 percent m-o-m), while the lowest selling price was recorded in Dará governorate at 8 500 SYP per litre (figure 25).



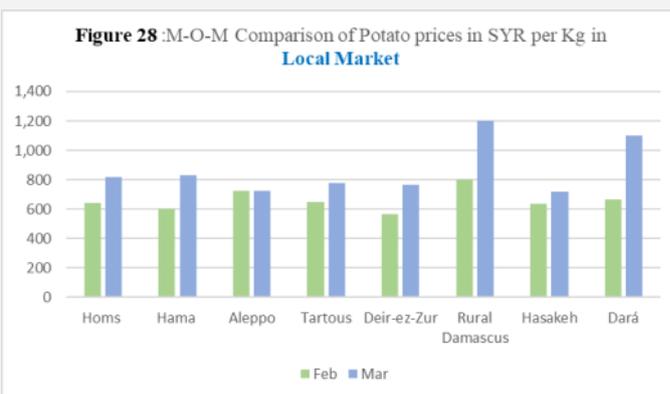
Sunflower oil average price increased to 8 954 SYP per litre (20 percent m-o-m increase) as highlighted in figure 26. Aleppo and Deir-ez-Zor governorates witnessed a sharp m-o-m increase (88 and 70 percent respectively). In Hasakeh, the average selling price reached 7 200 SYP per litre (31 percent m-o-m increase), while in Rural Damascus the price remained constant since February 2021 and with a litre was selling at 10 000 SYP (figure 26).



The average selling price of tomato increased across the monitored markets with the average selling price reaching 1 096 SYP per kg except in Tartous governorate where a 11 percent m-o-m decrease of tomato prices was recorded. The selling price of tomatoes remained constant in Aleppo since February at 1 050 SYP per kg. Tomato selling prices in Deir-ez-Zur increased significantly from 883 SYP in February 2021 to 1 267 SYP in March 2021, furthermore, Hasakeh governorate recorded a 39 percent m-o-m increase, with a selling price of 1 333 SYP per Kg



The average selling price of potatoes increased significantly in most of monitored governorates with the average price reaching 867 SYP per Kg and the highest price recorded in Rural Damascus at 1 200 SYP per Kg (50 percent m-o-m increase). Dará and Hama governorates also witnessed a sharp increase in potato prices (65 and 38 percent m-o-m). On the contrary, Tomato prices remained constant in Aleppo governorate, with an average selling price of 725 SYP per Kg



The average price of eggplant recorded was 1 114 SYP per kg in March 2021 across the monitored locations. However, Hasakeh governorate witnessed a sharp increase (50 percent m-o-m increase) with the average selling price reaching 1 500 SYP per Kg. Tartous governorate observed a slight price decrease (1 percent m-o-m) with the prices reaching 825 SYP per Kg. In both Aleppo and Dará governorates the price remained constant at 1 200 SYP per kg (figure 29)

