



Overall, food prices continue to fall across Syria. The reference food basket price decreased by two percent in February compared to January 2018.

Average food basket prices in opposition held cross-border areas (XB) are on average 9.3 percent more expensive than government held areas.

Aerial shelling heavily intensified in Eastern Ghouta in February. Many shops are closed and civilians remain for days in shelters rendering access to food very difficult. The price of a referential food basket is 6.8 times more expensive than the national average.

In the latter-half of February the sole trader allowed to trade inside Eastern Ghouta (Manfoush) stopped operating in the besieged enclave as his dairy factory and warehouses were shelled. Civilians in Eastern Ghouta now have to depend on the little food they have stored and can cultivate in addition to the little food assistance allowed inside the enclave.

A: Standard Food Basket



In February 2018, the national average price of a standard food basket¹ (group of essential food commodities) was SYP 24,985. Decreasing by two percent m-o-m (month-on-month), decreasing by 23 percent compared to August 2017 and by 28 percent y-o-y (year-on-year).

The governorate with the highest average food basket price was Dar'a XB (area of Dar'a under opposition control) at SYP 28,435. While the lowest average food basket price was recorded in Al-Hasakeh at SYP 22,090. Average XB food basket price in February was SYP 26,835, 9.3 percent more expensive than the average food basket price in government held areas (SYP 24,557).

Food basket prices decreased in 13 out of Syria's 14 governorates in February. While an increase in the average retail price of a food basket was monitored in the opposition held area of Dar'a, Idleb opposition held areas saw no change to the food basket price, while Quneitra saw a decrease. The general decrease in prices across Syria was led by falling prices of all food basket commodities (commercial bread, vegetable oil, rice, lentils and sugar) as well as diesel and gas.

The largest m-o-m drop in food basket prices in February was in Lattakia (-9 percent), Ar-Raqqa (-8 percent) and Dar'a (-7 percent). Deir-ez-Zor has seen an increase in m-o-m prices by 6 percent compared to a decrease of 41 percent in January, highlighting the volatile infrastructure and services situation in the governorate.

Chart 1: Min. vs. Max. National Average Cost of Food Basket (in SYP)*

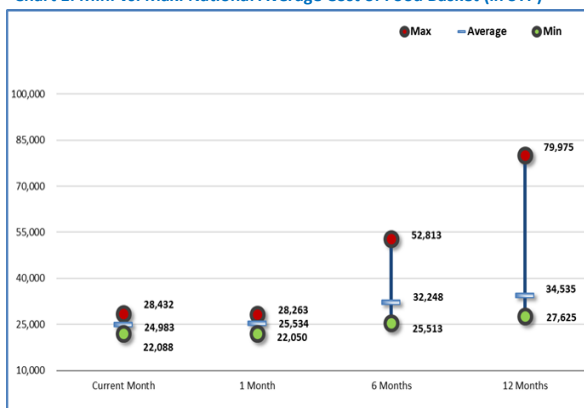
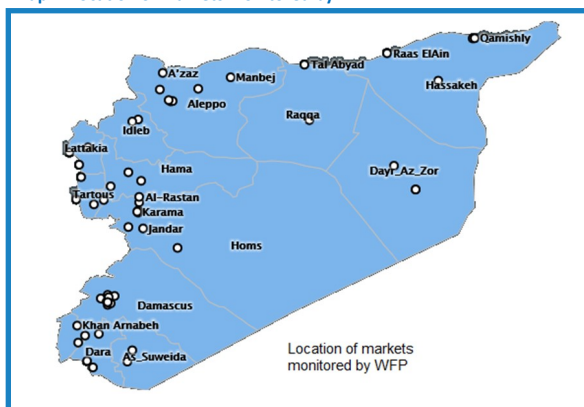


Figure 1: Food Basket Cost and Changes (in SYP)

Governorate	Price February 2018	Price 1 month change	Price 6 months change	Price 12 months change
Aleppo	SYP 27,545	-3%	-5%	-10%
Damascus	SYP 26,000	-1%	-12%	-15%
Dar'a	SYP 25,600	-7%	-9%	-7%
Dar'a XB**	SYP 28,435	4%	5%	4%
Deir-ez-Zor	SYP 26,445	6%	-50%	-67%
Hama	SYP 23,150	-3%	-27%	-28%
Al-Hasakeh	SYP 22,090	0%	-13%	-27%
Homs	SYP 24,055	1%	-17%	-21%
Lattakia	SYP 22,850	-9%	-23%	-26%
Ar-Raqqa	SYP 24,370	-8%	-41%	-28%
Rural Damascus*	SYP 24,335	-4%	-16%	-20%
As-Sweida	SYP 24,286	-6%	-24%	-26%
Tartous	SYP 22,975	-2%	-26%	-25%
Quneitra	SYP 25,545	-8%	-8%	-9%
Quneitra XB**	SYP 25,045	-2%	-23%	-28%
Idleb XB**	SYP 27,025	0%	-24%	-23%
Average	SYP 24,985	-2%	-23%	-28%

Map 1: Location of markets monitored by WFP



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1. The cost of a standard basket of dry goods providing 1,930 kcal a day for a family of five during a month. The basket includes 37 kg of bread, 19 kg rice, 19 kg lentils, 5 kg of sugar, and 7 kg of vegetable oil.

*Eastern Ghouta is not included

**XB = Areas supported through cross-border humanitarian interventions

B: Eastern Ghouta

Eastern Ghouta, a suburb 15 kms east of Damascus city, saw an intensification of aerial bombing in February 2018 as government forces increased pressure to re-control the area. Shelling heavily increased in the later half of February 2018, with reports that it was one of the heaviest aerial bombing campaigns of the Syrian conflict so far. A UN Security Council resolution calling for a 30-day truce in the fighting was agreed to on 25 February to allow for urgently needed humanitarian supplies to enter the area and allow for medical evacuations, which however fell on deaf ears. On 27 February, Russia announced a five-hour (9am to 2pm) daily cease fire to allow for a humanitarian corridor for people to leave the enclave. Due to the intense bombing many shops remain closed and food is scarce.

The only trader allowed to trade in Eastern Ghouta ('Manfoush'), no longer operates in the area as his dairy factory and warehouses were shelled. People in Eastern Ghouta now have to depend on the little food they can cultivate and on the seldom allowed food assistance from humanitarian organizations into the area.

Duma, Nashabiyeh and Zamalka markets were monitored for Eastern Ghouta in February.

1– Food basket prices

The average food basket price in the market across Eastern Ghouta was SYP 195,985/basket. Reflecting an increase of four percent m-o-m. The February average food basket price was 6.8 times the national average food basket price, up from 6.3 in January. The Eastern Ghouta average food basket price in February was 6.5 times the average price of a food basket in Damascus, just 15kms from the besieged area, up from 6 times in January (Chart 2).

2– Bread prices :

The price of a bundle of bread (1.3kgs) was SYP 1,400 in Eastern Ghouta in February, up seven percent compared to January. This was 11 times the national average price for a bundle of bread (SYP 117) and 27 times the price of a bundle of bread in Damascus (SYP 50) for the same month (Chart 3).

3– Vegetable prices:

The price of fresh tomatoes, a proxy for fresh vegetables, skyrocketed in Eastern Ghouta in February. The price was SYP 5,000/kg in February 2018, increasing by 178 percent m-o-m (SYP 1,800/kg). The price is 21.8 times higher than the February average price of 1kg of fresh tomatoes in Damascus, up from 5.8 times in January and 11.3 times higher than the national average price of fresh tomatoes for February, up from 4.9 times in January (Chart 4).

4– Energy prices:

The price of diesel continued to be much higher in besieged Eastern Ghouta than elsewhere in Syria. The price of diesel in Eastern Ghouta averaged 4,500 SYP/litre in February remaining unchanged m-o-m. The price of diesel in Eastern Ghouta was 11 times higher than the national average (up from 8.8 times in January) and 14 times higher than average diesel prices in Damascus (up from 12.5 times in January) - Chart 5.

Butane gas was reportedly unavailable on the market in Eastern Ghouta throughout February. Highlighting the extreme difficulty to procure basic items in the enclave (Chart 6).

Chart 2: Eastern Ghouta food basket price compared to Damascus and the national average

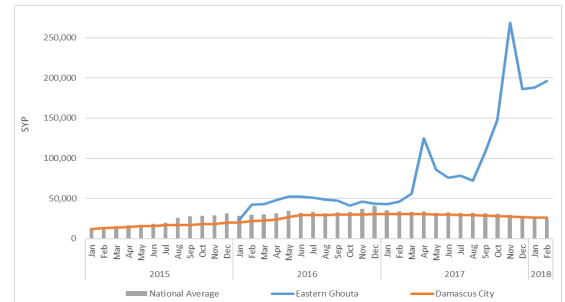


Chart 3: Comparing SYP/1.3kg bundle of bread price in Eastern Ghouta, Damascus and the national average

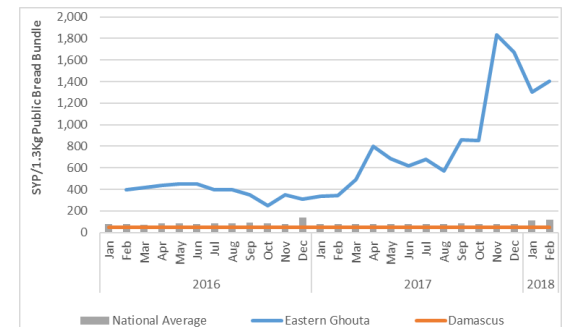


Chart 4: Retail price of 1kg of fresh tomatoes Eastern Ghouta compared to Damascus and national average

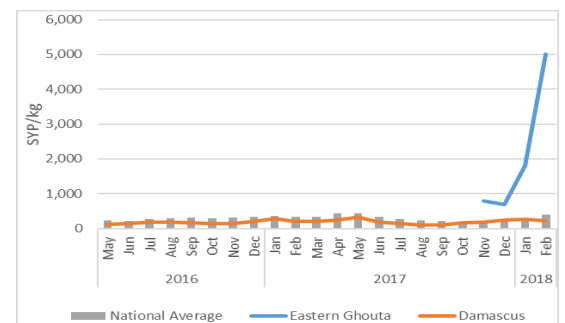


Chart 5: Diesel price in Eastern Ghouta compared to Damascus and the national average

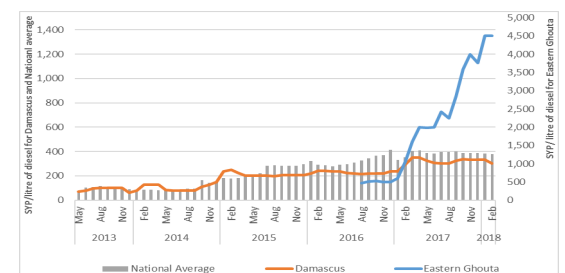
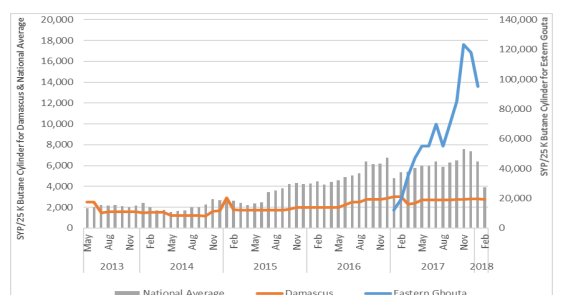


Chart 6: Butane cylinder (25K) price in Eastern Ghouta compared to Damascus and the national average



Source: WFP Field Offices

D: Retail Prices

1—Wheat flour, rice and bulgur:

One kg of wheat flour on average across Syria sold at SYP 279, rice sold at SYP 527/kg and bulgur sold at SYP 339/kg in February 2018. Wheat flour and rice prices saw m-o-m decreases of one and two percent respectively, while the price of bulgur saw a m-o-m increase of three percent. Prices varied by the areas level of accessibility with accessible areas reporting no m-o-m change on wheat flour, an increase in bulgur prices of four percent and a decrease of five percent in rice prices. Hard-to-reach areas reported a fall of three and four percent in m-o-m wheat flour and rice prices respectively, and an increase of two percent in bulgur prices. Opposition-held cross-border areas (XB) reported a m-o-m increase in wheat and bulgur prices by two and four percent respectively and a decrease of three percent in rice prices. Besieged Eastern Ghouta saw m-o-m increases of two, nine and five percent for wheat flour, rice and bulgur prices respectively (Charts 7, 8 and 9).

Eastern Ghouta was the area with the highest food prices across Syria for wheat flour SYP 2,700/kg, rice SYP 3,000/kg, bulgur SYP 2,500/kg, vegetable oil SYP 3,526/litre, tomatoes SYP 5,000/kg, sugar SYP 3,000/kg and lentils SYP 2,500/kg. The lowest prices by governorate were reported from Idelb for wheat flour (SYP 135/kg), from Al-Hasakeh for bulgur (SYP 213/kg), from Quneitra for tomatoes (SYP 172/kg), Ar-Raqqa for vegetable oil (SYP 509/litre) and As-Sweida for rice (SYP 275/kg) and Homs and Lattakia for sugar (SYP 250/kg).

2 – Bread:

In February 2018, the average nominal retail prices for public (government subsidized) bread and commercial (privately produced) bread were SYP 117/bundle and SYP 171/bundle, respectively. The price of public bread decreased by nine percent m-o-m. Commercial bread price decreased by seven percent m-o-m.

Ten governorates reported a public bread price of 50 SYP/bundle (1.3kg), the lowest price in Syria. The highest price for public bread was reported at 200 SYP/bundle in Idleb. Eastern Ghouta reported the highest price of commercial bread in Syria with a price of SYP 1,400/bundle (7.2 times higher than the national average). Tartous continued to record the lowest price for commercial bread at SYP 63/bundle.

Bread prices varied by the area's level of accessibility. Public bread prices were as follows: SYP 54/bundle in accessible areas, SYP 85/bundle in hard-to-reach areas and SYP 143/bundle XB areas. Representing the same price y-o-y for accessible areas, a five percent decrease y-o-y in hard-to-reach areas and a 14 percent decrease y-o-y in XB areas.

Commercial bread prices were as follows: SYP 99/bundle in accessible areas, SYP 143/bundle in hard-to-reach areas, SYP 215/bundle in XB areas and SYP 1,400/bundle in besieged Eastern Ghouta. Representing a two percent increase y-o-y for accessible areas, a five percent decrease y-o-y for hard-to-reach areas, a four percent increase y-o-y for XB areas and a 306 percent increase y-o-y for besieged Eastern Ghouta.

Chart 7: Wheat Flour Retail Price in SYP

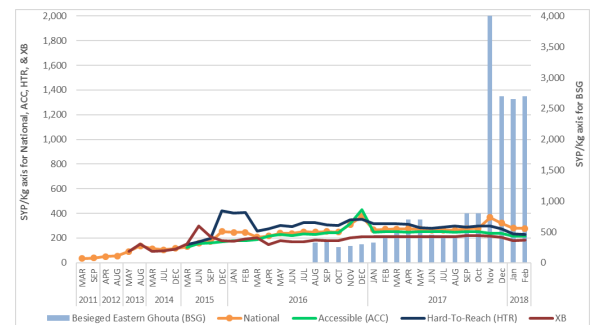


Chart 8: Retail Prices of Rice in SYP

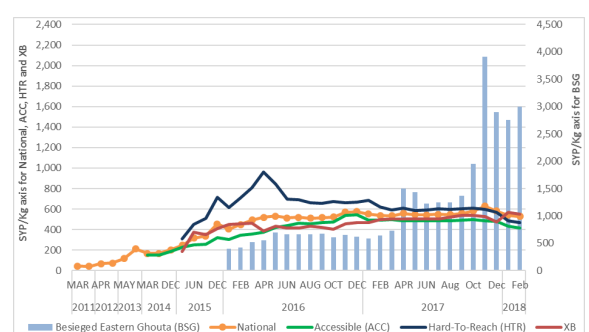


Chart 9: Retail Prices of Bulgur in SYP

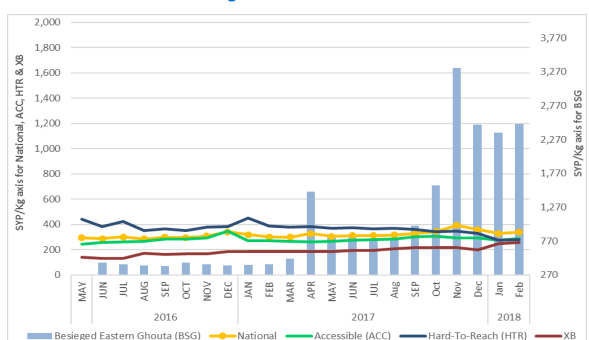


Chart 10: Retail Prices of Public Bread in ACC, HTR and BSG Markets in SYP

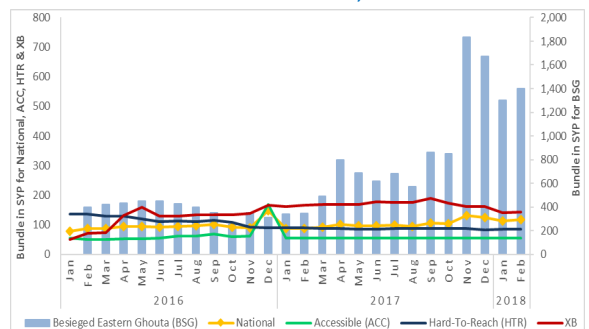
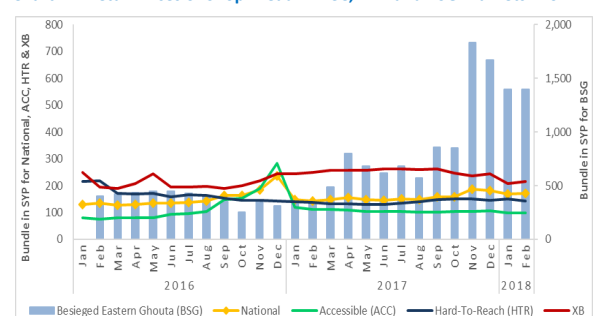


Chart 11: Retail Prices of Shop Bread in ACC, HTR and BSG Markets in SYP



Source: WFP Field Offices

3—Diesel and cylinder of butane gas

Diesel's national retail price averaged SYP 371/litre, decreasing by one percent m-o-m (SYP 381/litre). The price varied widely across Syria with accessible areas averaging SYP 252/litre of diesel, hard-to-reach areas averaged SYP 197/litre and XB areas averaging SYP 368/litre. The price of diesel in Eastern Ghouta averaged SYP 4,500/litre in February, 11 times higher than the national average (Chart 12). The highest price of diesel was in Eastern Ghouta while the lowest price was in Ar-Raqqa (SYP 72/litre).

A 25k cylinder of butane gas averaged SYP 3,930 nationally, falling by 38 percent m-o-m (SYP 6,381). The decrease is due to Eastern Ghouta not reporting on butane gas availability in February 2018. The price of butane gas varied widely across Syria. Accessible areas averaged SYP 2,826/25k, hard-to-reach areas averaged SYP 3,132/25k and XB areas averaged SYP 7,413/25k. The highest price of a 25k butane gas cylinder was recorded in Idleb XB at SYP 10,000/25k up 43 percent m-o-m. While the lowest price was recorded in Al-Hasakeh at SYP 2,317/25k, up 5.3 percent m-o-m.

E. Cereal wholesale prices and exchange rates

In February 2018, the average nominal wholesale price of cereal was SYP 187,472/MT for wheat grain, SYP 230,107/MT for bulgur and SYP 395,891/MT for rice. Using the Syrian Central Bank's official exchange rate of SYP 434 to the US \$ this translates to: US \$ 432/MT for wheat grain, US \$ 530/MT for bulgur grain and US \$ 912/MT for rice (Table 1).

The black market exchange rate across the country in February 2018 ranged between SYP 461 (Homs and Quneitra XB) to SYP 468 (Rural Damascus) per US \$1. The national average black market exchange rate is SYP 464 to US \$1 compared to the official central bank rate of SYP 434 to US \$1 (Table 2).

F. Food supply to markets

In February, commercial flows to between East and West Syria continued to improve with fewer check-points and better functionality of supply routes that link Ar-Raqqa and Deir-ez-Zor to main markets in Damascus, Homs and costal areas.

Traders in Ar-Raqqa city reported to be receiving in-flows of cheaper food from Turkey highlighting functional importation of goods.

In contrast, markets in besieged areas and active-conflict areas such as in East Ghouta, Afrin and Idleb deteriorated with many traders closing business, especially in conflict hotspots, and supply routes negatively impacted by the ongoing conflict.

Chart 12: Retail Prices of Diesel in SYP

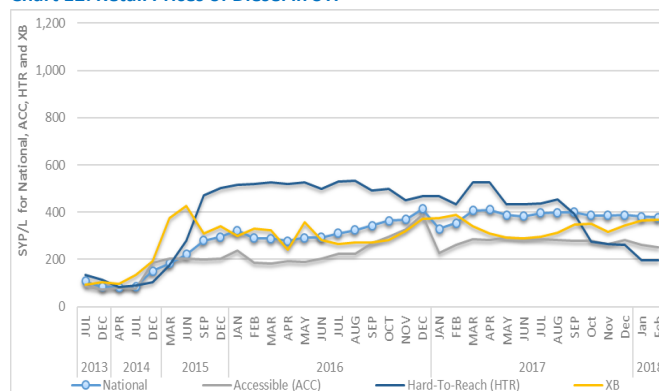


Chart 13: Retail Prices of Butane Cylinder in SYP

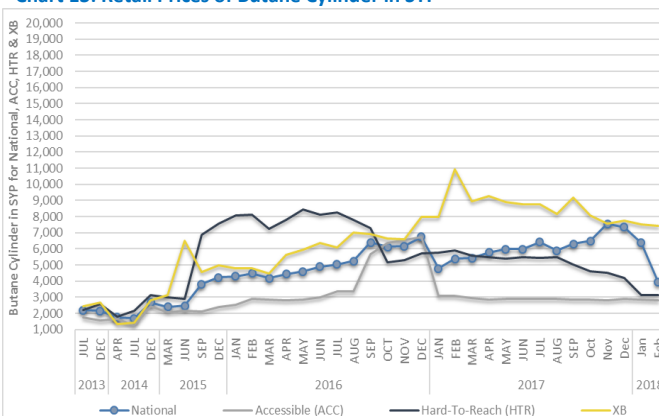


Table 1: National Average Wholesale Prices (1MT) for Wheat, Bulgur and Rice in SYP and US \$ using official exchange rate.

Commodity	February (SYP)	% change (m-o-m)	1MT in US \$
Wheat grain (1MT)	187,472	-0.6	432
Bulgur grain (1MT)	230,107	1.5	530
Rice (1MT)	395,891	-1.2	912

Table 2: 1 US \$ to SYP Black Market Exchange Rate

Governorate	February 2018	% Change (m-o-m)
Aleppo	464	0.2
Damascus	466	0.1
Dar'a	465	0
Dar'a XB**	469	10
Deir-ez-Zor	NA	NA
Hama	460	-0.6
Al-Hasakeh	463	1.1
Homs	461	-0.2
Lattakia	463	-0.6
Ar-Raqqa	463	0.2
Rural Damascus	468	1.5
Eastern Ghouta	NA	NA
As-Sweida	467	-1.7
Tartous	464	-0.4
Quneitra	467	0.2
Quneitra XB**	461	-0.2
Idleb XB**	465	0.4
National Average	464	0.5
Official Rate	434	0

Source: WFP Field Offices

**XB = Areas supported through cross-border humanitarian interventions

G. Terms of Trade (ToT):²

ToT between wage labour and wheat flour

The national average daily wage rate for non-skilled workers in February 2018 was SYP 1,852. Increasing by one percent m-o-m, by 8 percent since August 2017 and by 29 percent y-o-y. The increase in wage rates has been sustained across most of Syria apart from cross-border opposition held areas where non-skilled wage rates fell by eight percent m-o-m and by 15 percent compared to August 2018 levels (Chart 14).

In February, the national average daily wage of an unskilled labourer could purchase 6.6kg of wheat flour on the market. Representing a two percent increase compared to January 2018, in-line with reported increases in the national average non-skilled wage rate. Results however varied by an area's accessibility status (see Chart 15).

Accessible markets showed that 9.6kg of wheat flour could be bought compared to 8kg of wheat flour in hard-to-reach areas, 8.5kg of wheat flour for XB areas and 0.4kg of wheat flour for besieged Eastern Ghouta. All areas have seen a y-o-y increase in ToT for wheat vis-à-vis casual wage with accessible areas increasing by 65 percent, hard-to-reach areas increasing by 80 percent and XB areas increasing by 19 percent. Eastern Ghouta though saw a fall of 85 percent y-o-y, highlighting the high prices of wheat flour in the besieged area. The national average y-o-y casual labour to wheat flour rate increased by 26 percent (Chart 15).

TOT between sheep and wheat flour

In February 2018, the national average price of a two-year old male sheep was SYP 82,690/head. The price increased by 2.4 percent m-o-m but decreased by 29 percent compared to August 2017 and decreased by five percent compared to the y-o-y price.

The national average ToT between a sheep and wheat flour was 297Kg/sheep, which is 3.1 percent higher m-o-m showing that the price for a two-year old sheep increased compared to the price of wheat flour (Chart 15).

H. International market prices

The FAO Food Price Index averaged 170.8 points in February 2018 increasing by 0.8 percent m-o-m and falling by 2.7 percent y-o-y. The Cereal Price Index averaged 160.8 points in February, up by 2.7 percent m-o-m and up by 6.8 percent y-o-y (Chart 17).

In February, wholesale wheat grain prices on local markets averaged USD 432/MT, down 0.6 percent (USD 434/MT) m-o-m.

Chart 14: Non-skilled wage labour rates in Syria

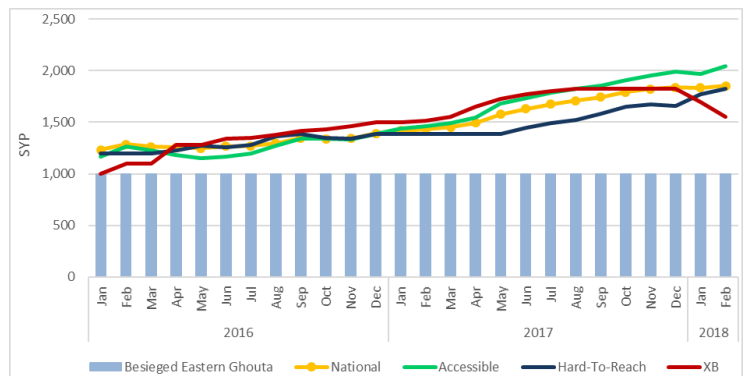


Chart 15: Terms of Trade (ToT) between wheat flour and wage labour

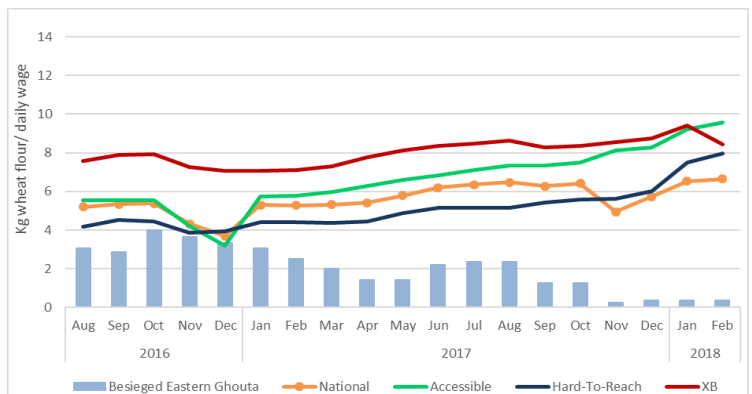
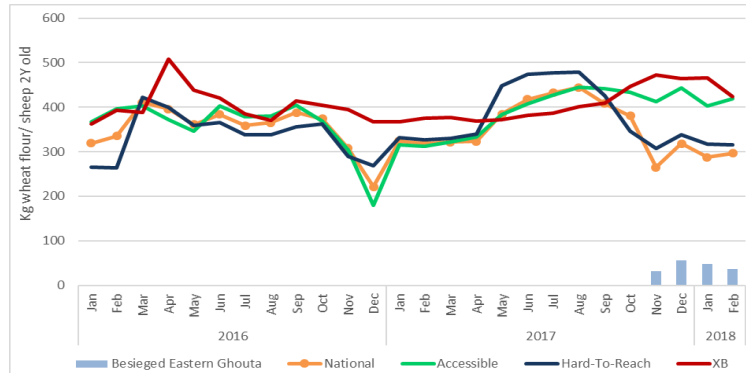
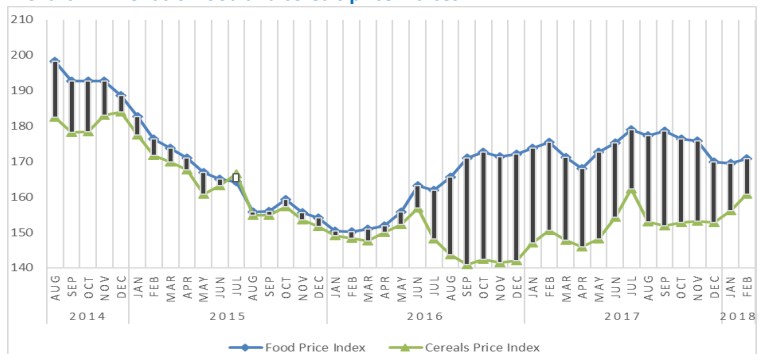


Chart 16: Terms of Trade (ToT) between wheat flour and the price of a 2Y old sheep



Source: WFP Field Offices

Chart 17: Trends of food and cereals price indices



Data Sources: https://ycharts.com/indicators/us_hard_red_winter_wheat_export_price_gulf_ports and <http://www.fao.org/worldfoodsituation/wfs-home/foodpricesindex/en/>

2. The ToT are proxy indicators of the purchasing power of households that rely on livestock and/or casual labour as their main source of income for the purchase of cereals from local markets. ToT are important components of food security analysis. Changes in the terms of trade between wages/livestock and staple food commodities are indicative of the trends in purchasing power and the impact on the food security situation of households dependent on food purchases through income from daily wage labour and/or the sale of livestock.

