

# BAKERIES IN SYRIA

## ASSESSMENT REPORT

Issue No: 02 | November 2015





The Assistance Coordination Unit (ACU) aims to strengthen the decision-making capacity of aid actors responding to the Syrian crisis. This is done through collecting, analyzing and sharing information on the humanitarian situation in Syria. To this end, the Assistance Coordination Unit through the Information Management Unit established a wide network of enumerators who have been recruited depending on specific criteria such as education level, association with information sources and ability to work and communicate under various conditions. IMU collects data that is difficult to reach by other active international aid actors, and publishes different types of information products such as maps, IDP camp monitoring reports, red flag and flash reports, monthly food price index, and thematic reports.

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## SUMMARY

The Syrian crisis is in the middle of its fifth year, and no close end is visible until the moment. With the continuation of war, the number of people in need for food assistance increases day by day, and the humanitarian aids distributed in Syria do not meet the actual population needs. For this reason, it is important to have a detailed picture of the status of bakeries, as the bread is the basic food item in Syria.

The Information Management Unit (IMU) of the Assistance Coordination Unit (ACU) conducted the second assessment of bakeries in Syria in order to inform a better response provided by aid actors within the food security sector. More specifically, the assessment aimed to collect data on the type of bakeries; the bakeries' distribution; bakeries' managing parties; status of functioning, as well as the number of beneficiaries; the bread production capacity; sources of flour and support; and bread distribution and prices.

A total of 607 bakeries in 296 villages in 88 sub-districts across 12 governorates were assessed in September 2015. Data collection was carried out through IMU's network of enumerators based at bakery level in Syria. This assessment was carried out in consultation with ACU's departments; the project management department and humanitarian intervention department. The second version of Bakeries' questionnaire includes some significant points that were added after consultations and by IMU's analysis team, as following:

- The managing parties of the bakeries. The assessment results shows that 52% of the assessed bakeries were managed by the bakery owner, followed by local councils that managed 15% of assessed bakeries, and ISIL forces administered 10% of the bakeries in areas under their control.
- Main reasons for bakeries to function partially. The main reason for bakeries to function partially is lack of flour with 34%. Security reasons and operational costs come in the second place with 16%.
- Bakery support and kind of received support in the assessed bakeries. The analysis shows that more than two thirds of the bakeries receive support with 67%. The basic kind of received support is the provision of flour with 31%, followed by fuel support with 18% and yeast provision with 17% for all assessed bakeries.
- Bakeries' need for support and kind of needed support. Seventy three percent 73% of assessed bakeries need support. Regarding the kind of needed support, the assessment has showed that 28% of assessed bakeries need flour and 24% need fuel to operate in all governorates, and 15% need operational costs to be able to function properly.
- Bakery's accessibility to population. Eighty eight percent 88% of the assessed bakeries are easy to access by the population, 7% of the assessed are not accessible at all due to security problems.
- Number of people who suffer from severe lack of bread. The study covered the gap in individuals who receive bread in sufficient quantities. Rural Damascus recorded 1,298,290 individuals who suffer from bread shortages, followed by Idleb and Aleppo governorates.
- Bread selling and distribution methods. The study shows that 68% of the assessed bakeries sell or distribute the produced bread. Whereas 37% of the bakeries sell bread with regular prices and 43% of the bakeries distribute bread through the bakery itself.

Other important findings are outlined in the report with corresponding figures and maps.

While confronted with severe issues of security and access to inputs, bakers in Syria have shown great resilience in order to continue providing bread to the population. Nonetheless, there is an urgent need to further increase support to bakeries in Syria.

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## LIST OF ACRONYMS

<b>ACU</b>	Assistance Coordination Unit
<b>FAO</b>	Food and Agriculture Organization
<b>IDP</b>	Internally Displaced Person
<b>IMU</b>	Information Management Unit
<b>INGO</b>	International Non-Governmental Organization
<b>ISIL</b>	Islamic State of Iraq and the Levant
<b>LC</b>	Local Council
<b>LNGO</b>	Local Non-Governmental Organization
<b>OCHA</b>	Office for Coordination of Humanitarian Affairs
<b>UN</b>	United Nations
<b>WFP</b>	World Food Program

## GEOGRAPHICAL CLASSIFICATIONS

<b>Governorate</b>	Highest form of governance below the national level
<b>District</b>	Sub-division of a governorate in which government institutions operate
<b>Sub-district</b>	IMU Sub-division of a district composed of towns and villages
<b>Village</b>	Lowest administrative unit

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## Introduction:

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As the conflict in Syria enters its fifth year, over 250,000 people have been killed, according to the last estimation of OCHA in November, 2015 and over one million have been injured. More than half of all Syrians have been forced to leave their homes, and by the end of 2015, the death toll in Syria is likely to reach more than 300,000 dead people. According to the overall assessment of the humanitarian needs in 2015 inside Syria, today 12.2 million people are in need of humanitarian assistance<sup>1</sup>. The World Food Program (WFP) is struggling to meet the urgent food needs of nearly 6 million displaced people in Syria and the neighboring countries.

The protracted crisis in Syria is affecting millions of people and leading to the destruction of infrastructure and public services, mainly those touching directly the lives of people. The decrease in food assistance to some 1.6 million beneficiaries has led to an overall increase in food insecurity for Syrian refugees<sup>2</sup>. The chaos and conflict in Syria has also led to the depletion of Syria's livestock, which was estimated in 2010 by the Food and Agriculture Organization (FAO) at 15.5 million sheep and 2.0 million goats, but is thought to have fallen by nearly 40 percent<sup>3</sup>. By July 2015, Syrian society is facing a severe crisis in food security especially in the provision of a main food item consumed in the Middle East (bread).

In Syria, numerous bakeries were in order before the crisis, now however, most of them are fully destroyed or lacking flour and fuel needed to operate. As a result, the Syrian people are in need of significant food assistance.

The Information Management Unit (IMU) of the Assistance Coordination Unit (ACU) is working on a second assessment report on bakeries in Syria<sup>4</sup> during the second half of 2015, in order to highlight these needs and help aid organizations plan their programs. The assessment will be based on reliable data collected by enumerators recruited by the IMU in twelve governorates in Syria. The data will provide accurate reflection of the reality on the ground.

This assessment data should be used in conjunction with other humanitarian organizations' assessments data to spot any gaps and address them.

This assessment is crucial for aid actors intervening in Syria as they need accurate information to inform their programs. These programs can be food security programs such as bakery support programs. With this report, humanitarian organizations will possess information to deliver aid to those most affected.

There are many parties interested in helping Syrians overcome their crisis like International NGOs, Syrian NGOs, donors, Turkish NGOs and United Nations' organizations (FAO, OCHA, etc.).

Furthermore, this assessment report will allow the ACU's Projects Management Unit plan their "Wheat Program", which is launched in October 2015 as a contributor to the food security response. The wheat program works on buying wheat crops of the 2015 season from out of regime control areas which indicate the most urgent needs. The wheat is sent afterwards to mills also inside Syria to produce flour to be produced there. Finally, the support will be addressed to bakeries according to the assessment released by the ACU's IMU.

## Methodology:

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This section provides an overview of the methodology designed and implemented by the IMU for the assessment of bakeries in Syria. The overall approach applied for the assessment combines quantitative and qualitative methods. More specifically, the assessment included key informants' interviews with the owners and managers of the bakeries, the managing party of the bakery, local councils, direct field observations by enumerators, and testimonies of the region inhabitants. This section presents in details the assessment sample and sampling method, the assessment tools; the data collection process; subsequent data management and analysis; and the limitations thereof.

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1- UNDER-SECRETARY-GENERAL FOR HUMANITARIAN AFFAIRS AND EMERGENCY RELIEF COORDINATOR, STEPHEN O'BRIEN, Statement to the Security Council on Syria, New York, 16 November 2015

2- WFP Syria Crisis Response Situation Update: June 2015

3- "FAO/WFP Crop and Food Security Assessment Mission to the Syrian Arab Republic," Food and Agriculture Organization of the United Nations and the World Food Program, July 5, 2013

4- Bakeries in Syria, Assessment Report, December 2014, Information Management Unit

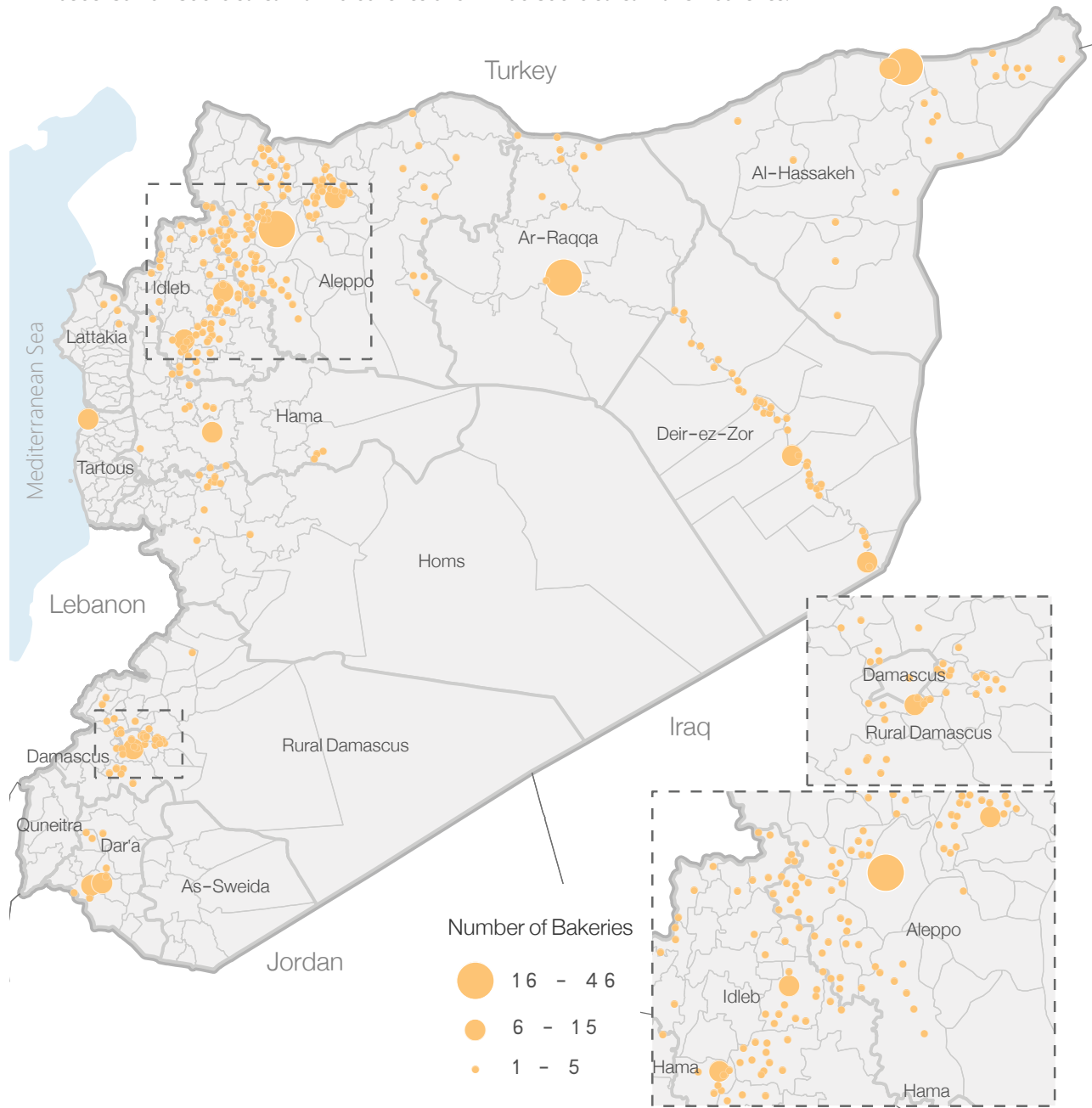


## ASSESSMENT SAMPLE

The assessment aimed to cover all kinds of bakeries functioning, non-functioning and bakeries that function partially in assessed areas but the ongoing high-intensity protracted conflict limited the scope of data collection. Nonetheless, the assessment sample included 607 bakeries located in 88 sub-districts in twelve governorates: Aleppo, Al-Hasakeh, Ar-Raqqa, Deir-ez-Zor, Hama, Dar'a, Homs, Idleb, Lattakia, Damascus, Rural-Damascus, and Tartus. As well as, the bakeries in some besieged areas were also covered like Rural Damascus and Al Wa'er in Homs Governorate.

### Map 1: Number and Distribution of Assessed Bakeries by Village

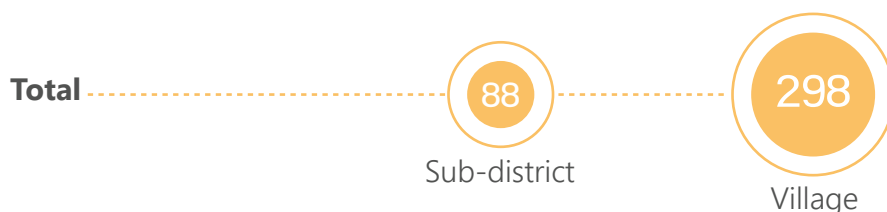
Map 1 below shows that the majority of assessed bakeries are distributed in Aleppo and Idleb governorates, specifically in Jebel Saman Sub-district with 46 bakeries and Al Bab Sub-district with 32 bakeries.



It should be noted that the survey includes public, private and joint bakeries. The focus on functioning bakeries helps humanitarian actors develop a plan to decide where to distribute raw materials. On the other hand, data related to non-functioning bakeries was also collected to support interventions focusing on the rehabilitation of destroyed and damaged bakeries. Regarding the bakeries that function partially, data was collected about the reasons that cause the shortage of bread production in some bakeries, so the quantity of bread is not sufficient and does not cover the population needs in the areas covered by these bakeries.

**Table:** Assessment Sample

Governorate	Idleb	Al-Hasakeh	Ar-Raqqa	Lattakia	Aleppo	Hama	Homs	Dar'a	Deir-ez-Zor	Rural Damascus	Tartous	Damascus
sub-district	14	8	5	3	16	6	3	5	10	16	1	1
village	59	20	15	4	89	13	9	11	39	36	1	2



According to the latest DYNAMO No. 4 data, 16.85% of functioning bakeries were public (121 bakeries), 74.37% (534 bakeries) were private and 8.77% of (63 bakeries) were joint, where the total number of functioning bakeries was 718 bakeries.

## ASSESSMENT TOOLS

For the purpose of this assessment, IMU has modified the questionnaire that was used during the bakeries' assessment in 2014 based on consultations with the Project Management Unit and Humanitarian Intervention Unit at Assistance Coordination Unit. Some key topics were added to the questionnaire, the most important topics are the main reasons for bakeries to function partially, the managing party of the bakery, kind of received support and kind of needed support, bakeries accessibility to population, number of individuals who are suffering from severe lack of bread and methods of bread distribution and selling.

The questionnaire was administrated by enumerators during key informant interviews with the owners, managers of the bakeries, the party or organization that manage the bakery and local council that works on bread distribution of the assessed bakery. To complement key informant interviews, data was also collected through direct field observations by enumerators and through the testimonies of the region inhabitants.

## DATA COLLECTION

The data collection phase started on October 1, 2015 and was completed within one month. Data collection was carried out through IMU's network of enumerators based at bakery level in assessed areas in Syria. In total, 94 enumerators contributed to this assessment. Enumerators selected by IMU have an extensive knowledge of the sub-district and villages located in that sub-district in which they are based. For instance, they knew or could quickly get the contact of each bakery owner in the village. Enumerators directly went to each bakery to administer the questionnaire to the manager of the bakery. The questionnaire was directly filled online.

## DATA MANAGEMENT AND ANALYSIS

IMU Data Management Officer received the questionnaires from enumerators electronically based on the KoBo template prepared by data analysis team and then were exported to an Excel database and proceeded with data cleaning and validation. Upon consolidation of the collected data, IMU data analysis team proceeded with data visualization by identifying the required tables, graphs, and maps which will feed into the analysis of assessment findings. Data visualization was conducted using MS Excel program, and missing and external values were detected using SPSS statistical program. Some external and missing values were corrected through debriefing process by enumerator network coordinator. IMU GIS officer produced the maps using Arc GIS software. Upon request by partners, further details can be produced by IMU.

The consolidated dataset served as a basis for the statistical analysis related to each issue covered by the assessment. Further in-depth analysis of specific variables was conducted to elaborate the key findings presented in this report. Data analysis shaped the structure of the report and informed the development of the intervention priorities for interested parties.

IMU will actively disseminate the findings through the release of the final report and presentations with relevant stakeholders.

## LIMITATIONS

**A number of limitations were identified during the assessment design phase and implementation:**

- Only three areas with five bakeries were assessed in Damascus City, so the analysis results do not represent the whole city.
- IMU enumerators faced difficulties in getting information from some bakery managers who were reluctant to participate in the assessment due to security concerns. Where possible and appropriate, IMU enumerators identified alternative sources to collect information.
- Some enumerators suffered from big distances between the bakeries, considering that each enumerator covers one sub-district and all the villages in this sub-district.
- The problem of continuous bombardment in some areas puts the life of enumerators in danger during transportation between distant bakeries in different villages.

## KEY FINDINGS

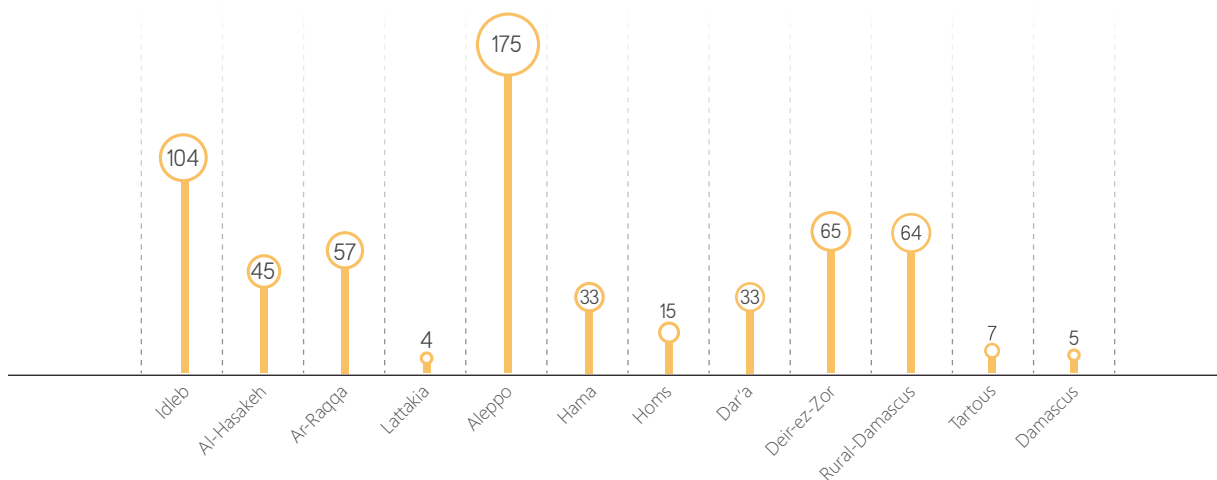
This section presents the main results from the assessment, which are structured into four sub-sections. First, the report presents general information about the assessed bakeries in terms of bakery distribution, assessed bakeries' types and the bakery managing parties. The second sub-section focuses on bakery production information, including the status of functioning of the assessed bakeries and focusing on the main reasons for bakeries' partial functioning or not functioning at all. Bakery's support information is covered in the third sub-section. The last sub-section provides an in-depth analysis of bread distribution and the beneficiaries.

### A. BAKERY GENERAL INFORMATION

Through this assessment, data was collected on the types of bakeries which were functioning, non-functioning and partial functioning in assessed areas.

The total number of assessed bakeries in twelve governorates was 607 bakeries. Figure 1 below illustrates the bakeries' distribution, with the highest number of bakeries in Aleppo Governorate 175 bakeries, due to ability to cover large number of bakeries in aleppo Governorate.

**Figure 1: Number of Assessed Bakeries by Governorate**

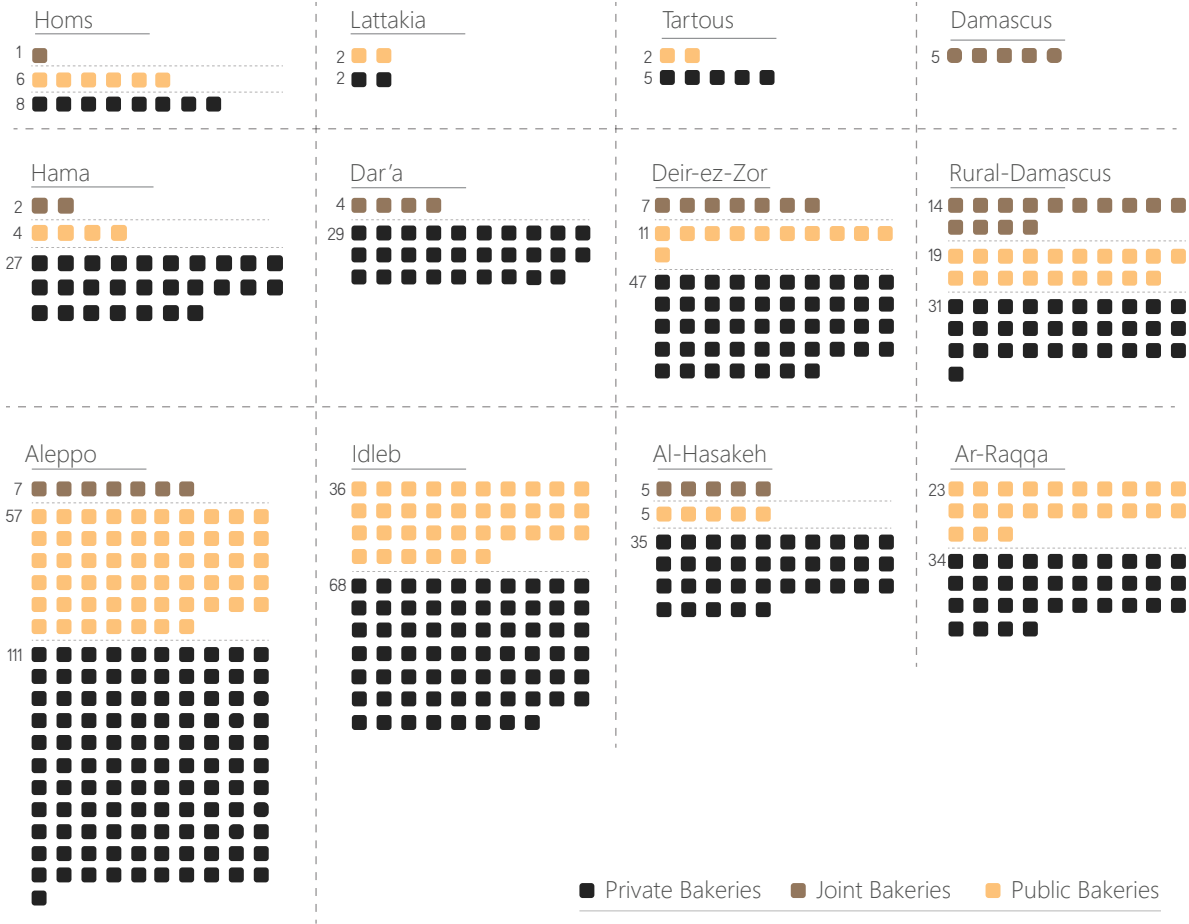
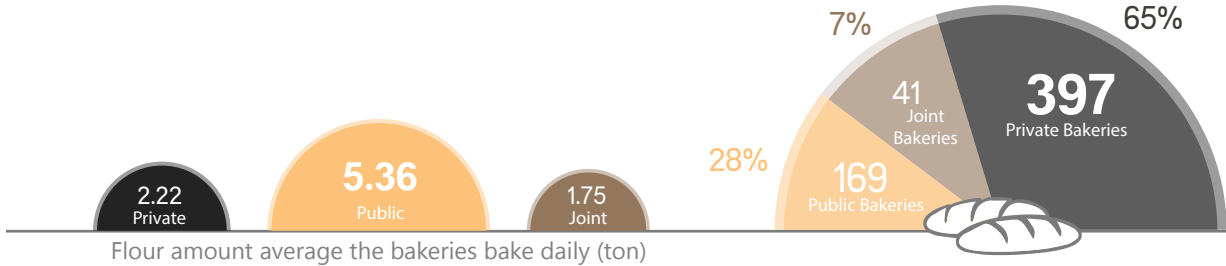


### PUBLIC, PRIVATE AND JOINT BAKERIES

This assessment covers three types of bakeries in Syria. The first type is the public bakeries that were owned by the government and had high capacity. However, they are now run by different controlling entities. The second type is the private bakeries owned by individuals, usually with a medium/ low capacity. Joint bakeries are bakeries used to be owned by the government, invested and run by individuals. The case now is those bakeries are under the control of the controlling entities in those regions. The majority of assessed bakeries were private bakeries (65%-397 bakeries), and a little more than a quarter of assessed bakeries were public (28%-169 bakeries). The joint bakeries were (7%-41 bakeries).

Figure 2 below illustrates the average production capacity according to bakery type. It is notable from the analysis that despite the fact that the percentage of public assessed bakeries is 28% it has the highest average of daily production capacity 6.32 ton which is nearly twice the daily capacity of private bakeries that constitute 65% of the assessed bakeries. Regarding the daily capacity of joint bakeries, it is nearly 2 tons.

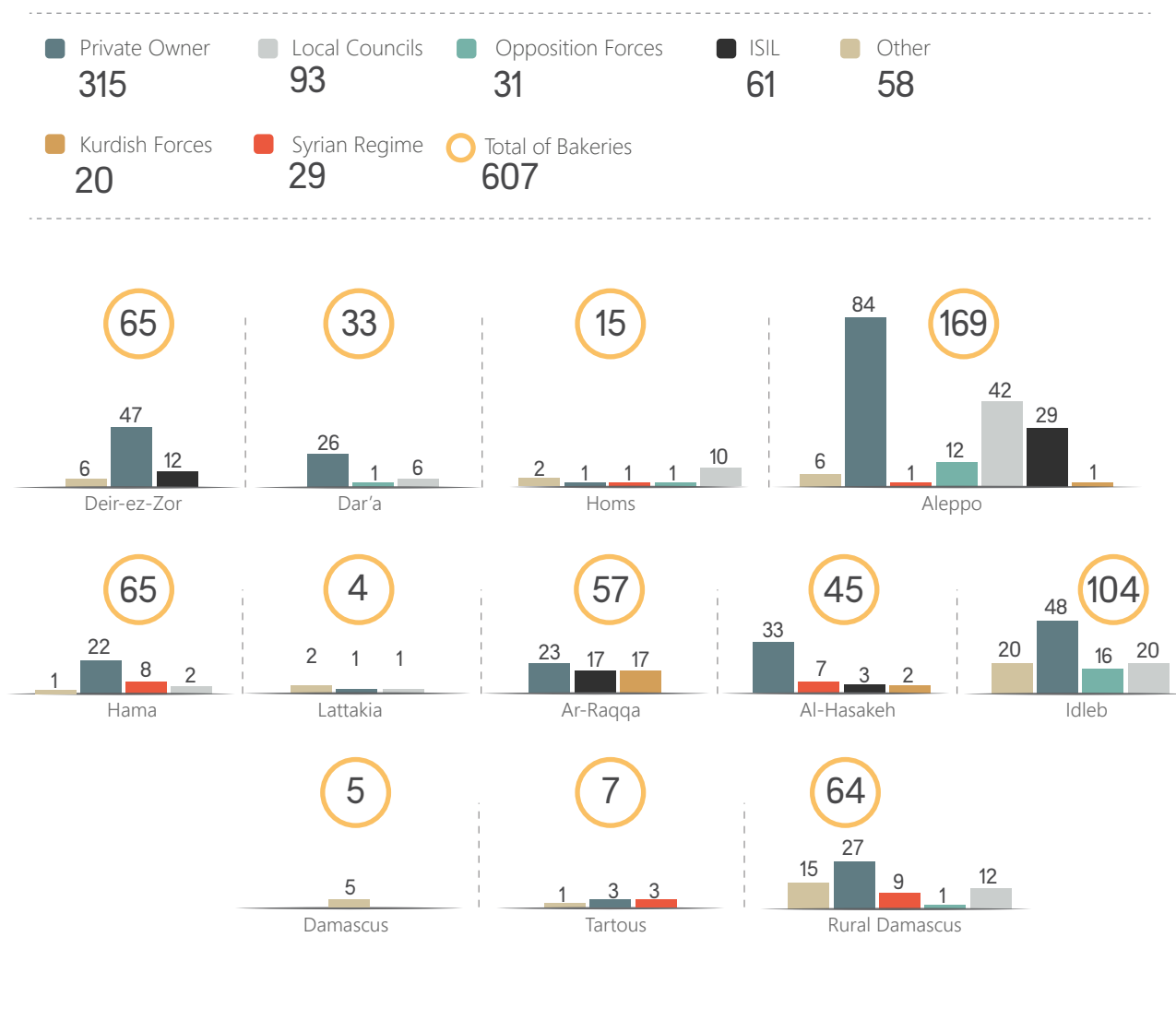
Figure 2: Number of Assessed Bakeries and the Actual Daily Production Capacity by Bakery Type



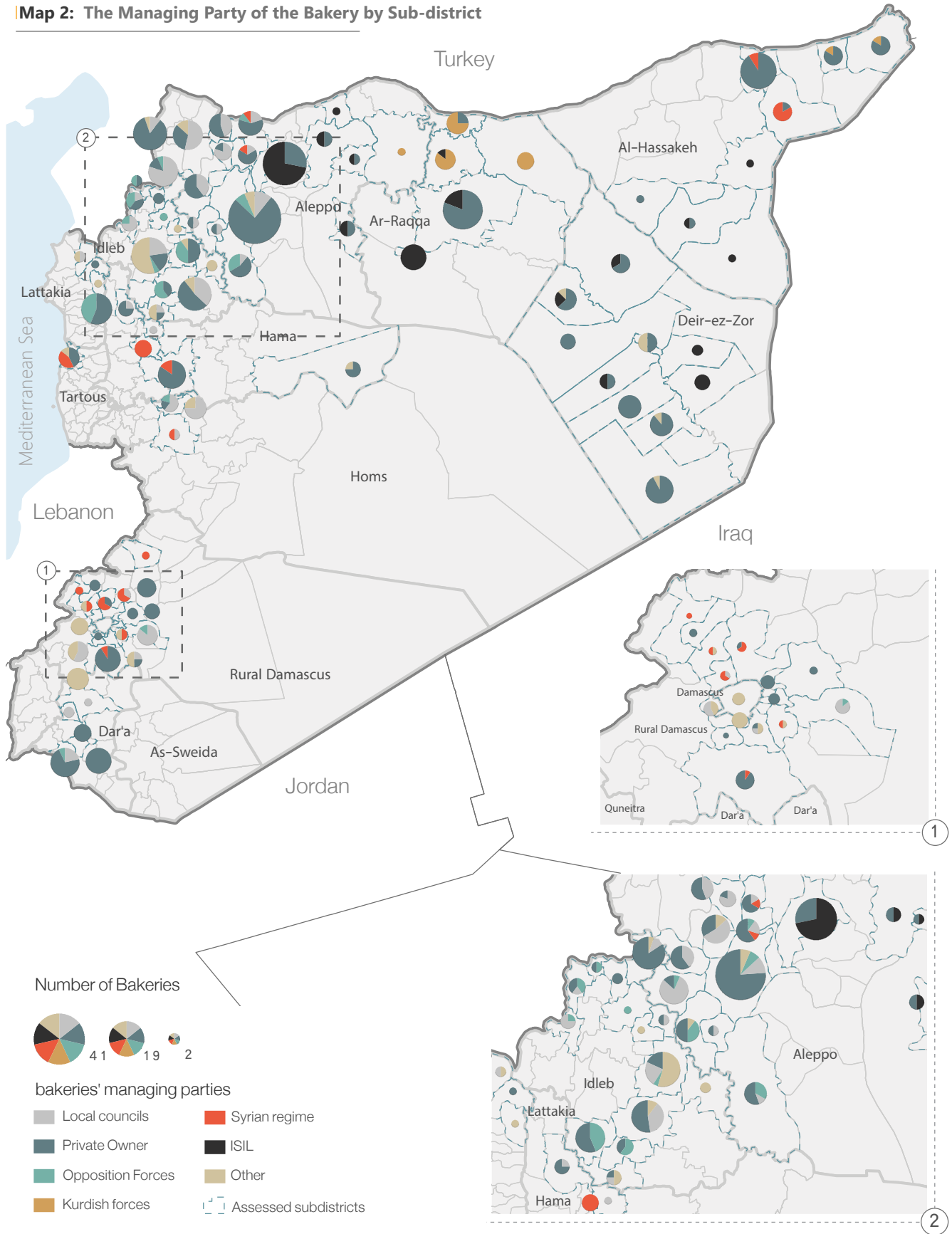
The high proportion of private bakeries (65%) which have been covered in this assessment can be explained by the fact that this type of bakeries was the most prevalent within Syria before the crisis. Further, owners of private bakeries have the possibility to use different means in order to access raw materials at different prices, allowing them to keep their bakeries functioning.

The study analysis has showed that 52% of the bakeries were managed by bakery's owner, followed by local councils with 15% of assessed bakeries in liberated areas, and it is worth mentioning that ISIL forces managed 10% of assessed bakeries, as shown in figure 3.

**Figure 3: The Managing Party of the Bakery**



**Map 2: The Managing Party of the Bakery by Sub-district**



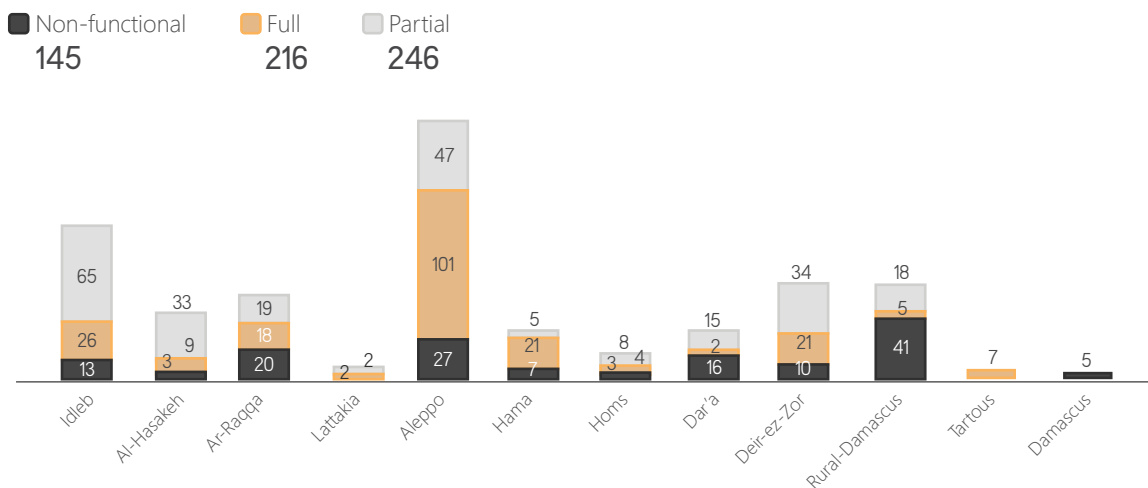
## B. Bakery Production Information

This sub-section includes important results of the study, the status of bakery's functioning and the main reasons for bakeries to function partially or to stop functioning at all. An important indicator is illustrated in figure 6 about the gaps in bread production of the assessed bakeries.

### STATUS OF FUNCTIONING

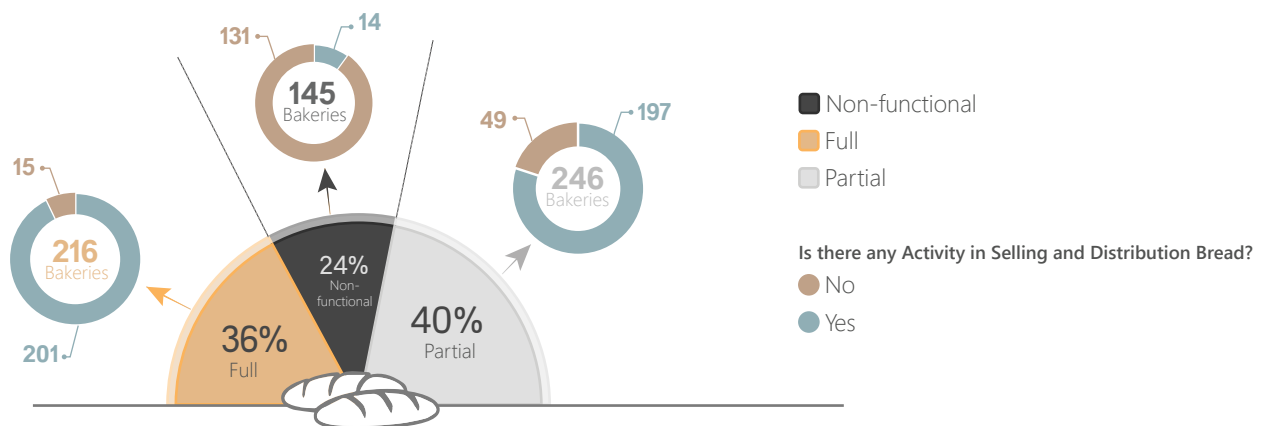
As part of the assessment, data was collected on the number of functioning/non-functioning/ partial-functioning bakeries. The highest proportion of non-functioning bakeries were based in the Rural-Damascus Governorate (64%-41 bakeries), followed by Dar'a Governorate (49%-16 bakeries), and Ar-Raqqa Governorate (35%-20 bakeries).

**Figure 4: Status of Functioning of Assessed Bakeries by Governorate**



We can notice from figure 5 below that there are 14 non-functioning bakeries acting as bread distribution center for population. As well as, 15 full functioning bakeries are not involved in bread distribution or selling, , as well as 197 out of 246 partially functioning bakeries are working on bread selling or distribution.

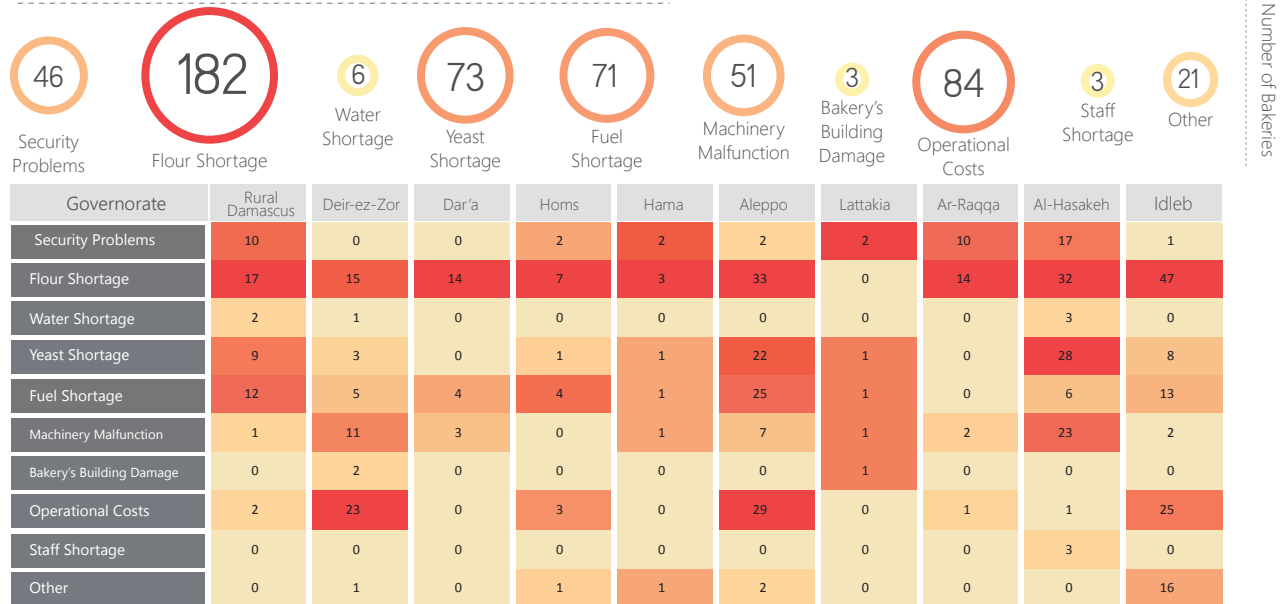
**Figure 5: Bakeries Activity in Bread Selling and Distribution According to Bakery's Functioning**





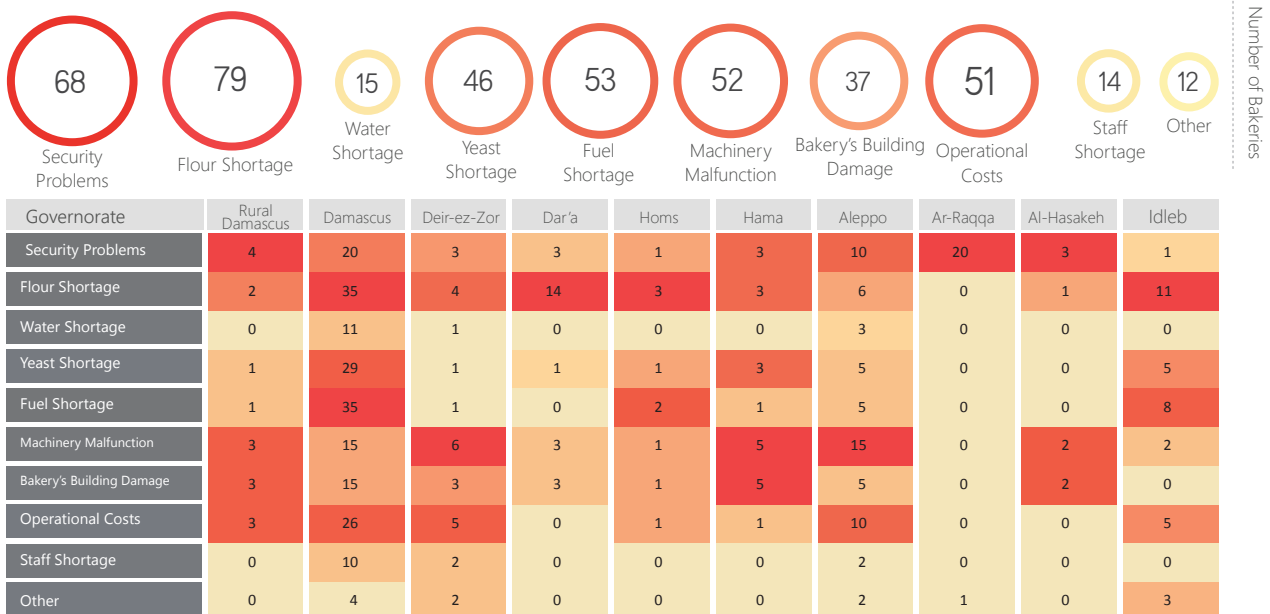
The main reason for bakeries to function partially is lack of flour with 34% in almost all governorates except Lattakia and Tartous governorates where the flour amount is sufficient in all assessed bakeries. The operational costs came in the second place with 16% to make the assessed bakeries function partially especially in Idleb, Aleppo and Deir-ez-Zor. The following heatmap illustrates the main reasons for partial functioning of assessed bakeries.

### Heatmap 1: Main Reasons for Bakeries to Function Partially



The shortage of flour was the most reported reason for bakeries to stop operating as well with 18% as shown in heatmap 2 below. Security problems affected 16% of the assessed bakeries to stop functioning, and the continuous severe siege in some areas led to a shortage in raw materials with 45% (flour, fuel, yeast and even water). As well as, continuous shelling and intensification of clashes, which cause destruction and damage to bakery structures and machinery malfunction, prevent the bakeries to produce bread and function normally.

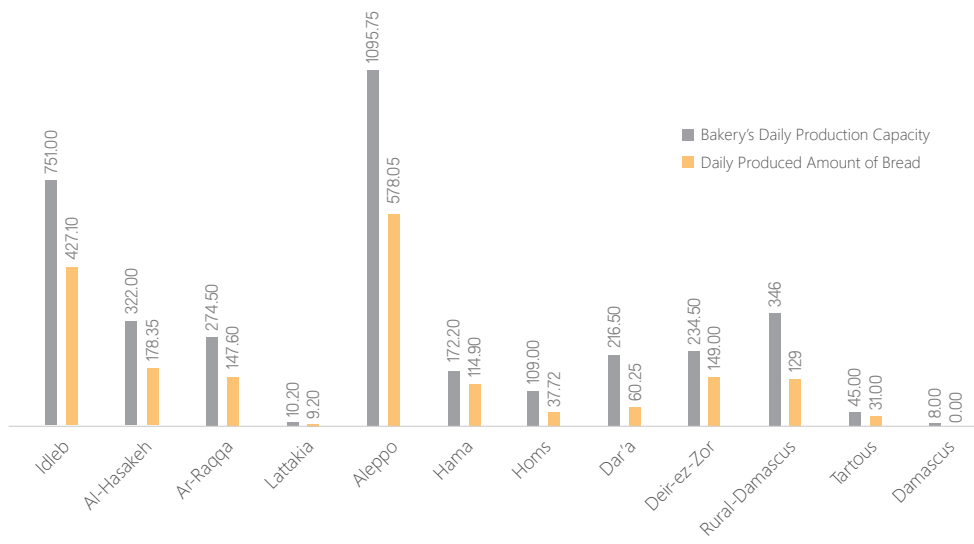
### Heatmap 2: Main Reasons for Bakeries to Stop Functioning



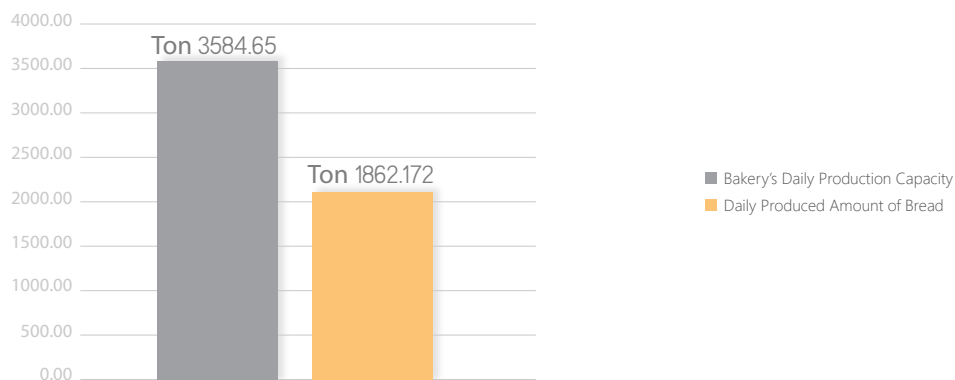
In order to identify the gap between the default production capacity of bakeries and their current level of bread production both on a daily basis, enumerators were asked to identify the flour amount that the assessed bakery can bake daily to be compared with the average flour capacity of the bakery, as figure 6 shows.

Changes in the bread production capacity of assessed bakeries are generally related to the difficulty in obtaining flour, shortage of fuel, electricity and yeast, as well as insecurity. We can notice from figure 6 that there is a gap between the daily default production capacity and the actual daily production capacity in almost all governorates especially in Aleppo, Idleb, Rural Damascus governorates. Regarding other governorates, the gap is less specifically in Tartous and Lattakia governorates. More in-depth analysis shows that the total gap in bread production capacity in all governorates reaches 1,722 tons, as figure 7 shows.

**Figure 6: Gaps in Bread Production of Assessed Functioning Bakeries by Governorate**

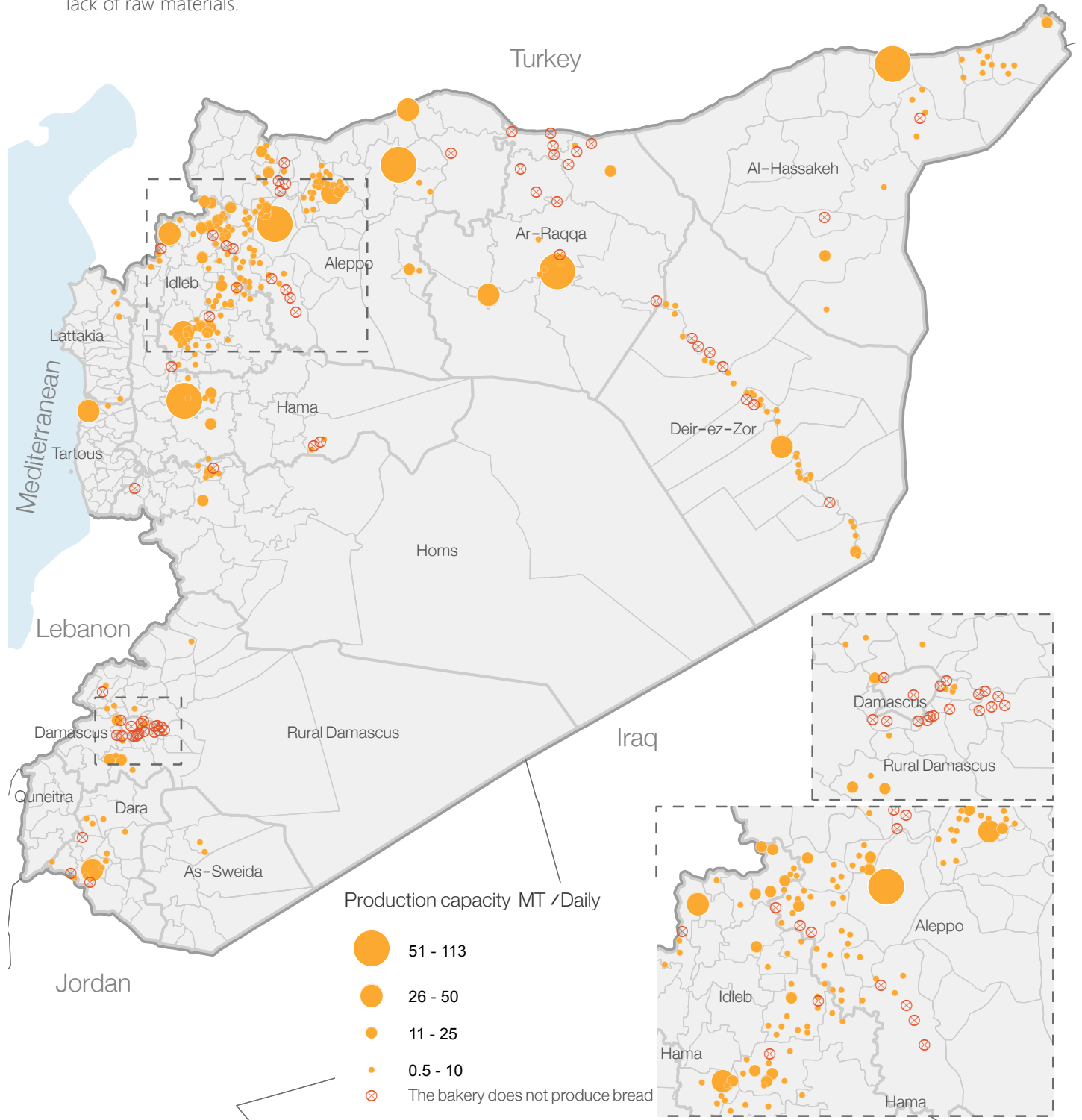


**Figure 7: The Total Gap in Bread Production of Assessed Functioning Bakeries**



**Map 3: The Actual Production Capacity of the Assessed Bakeries in Metric Ton by Village**

We can notice from map 3 that the highest production capacity of the assessed bakeries is concentrated within Ar-Raqqa, Quamishli, Aleppo, Menbij cities, where the production capacity in those cities varies between 60.5 to 112 metric tons for the flour amount used in bread production. It is worth mentioning that most bakeries in Western and Eastern Rural Damascus do not produce bread, and all assessed bakeries (35 bakeries) in Darayya, Babella, Nashabiyeh, Arbin, Maliha and Hajar Aswad sub-districts are out of order due to security reasons and lack of raw materials.



### C. Bakery Support Information

This sub-section includes sources and kind of support that the assessed bakeries receive and flour amount sufficiency.

The following two figures illustrate the percentage of bakeries that received support. We can notice that only 33% of the assessed bakeries received support, on the other hand, 67% did not receive support, noting that Damascus City did not receive support at all which justify the fact that the five assessed bakeries there are non-functional.

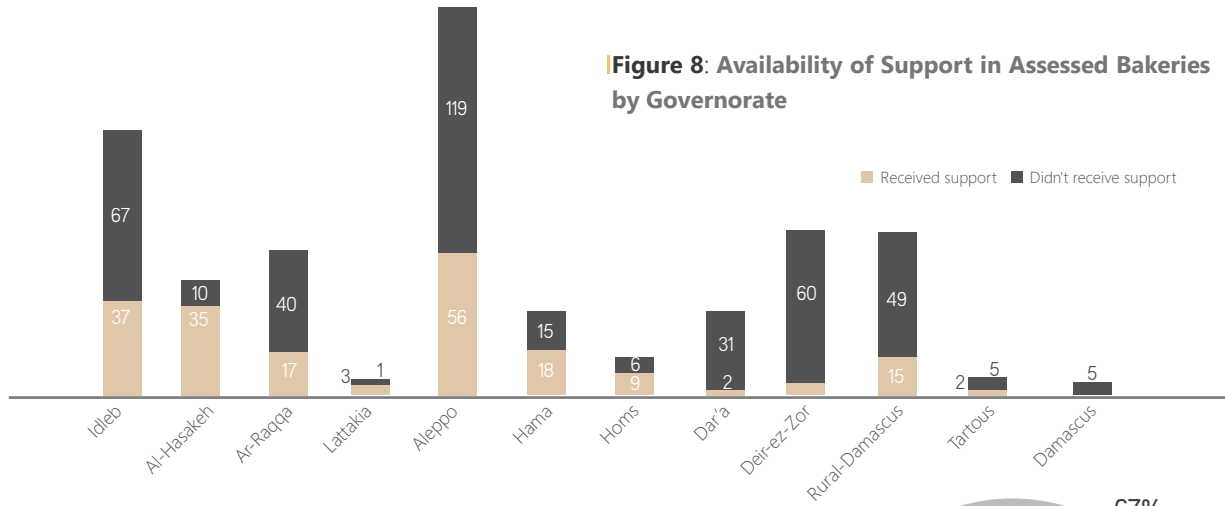
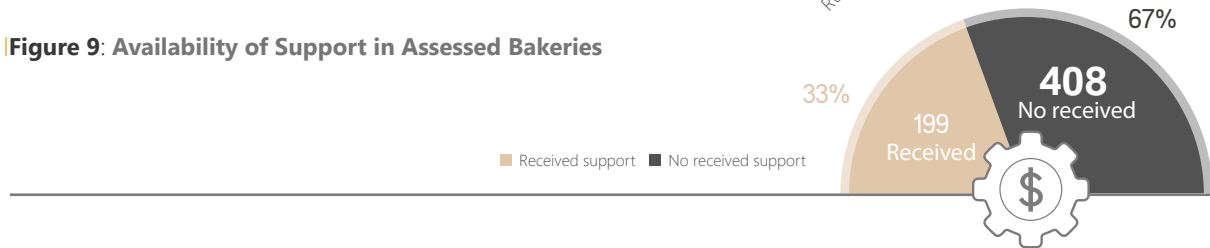


Figure 9: Availability of Support in Assessed Bakeries



Flour provision tops the support provided for assessed bakeries with 31% in all governorates, followed by fuel support with 18%. Other kinds of support were provided like yeast, water, operational costs, distribution and transportation costs.

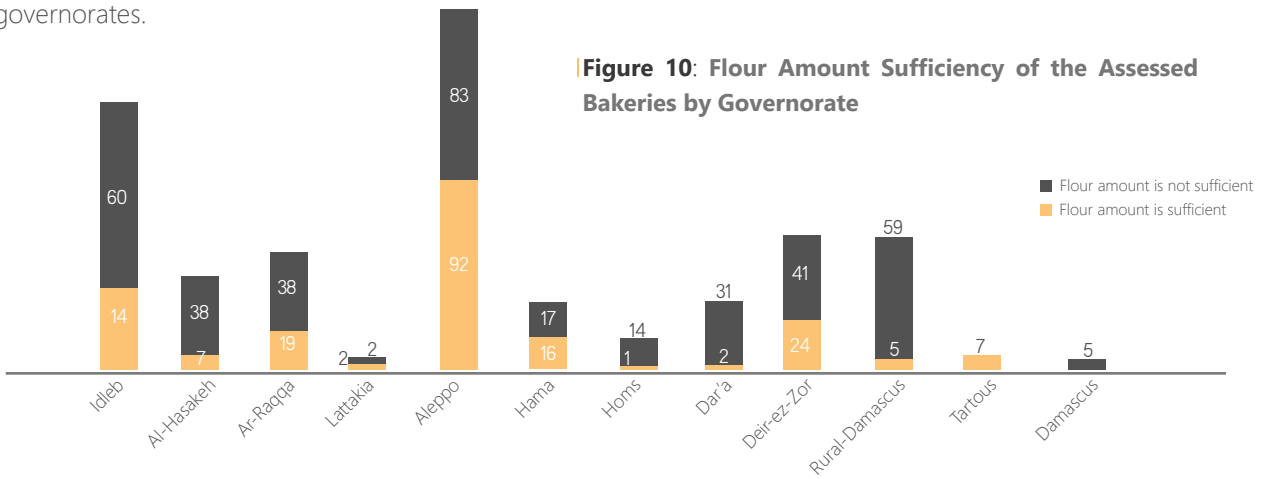
Heatmap 3: Kind of Support Received by the Assessed Bakeries



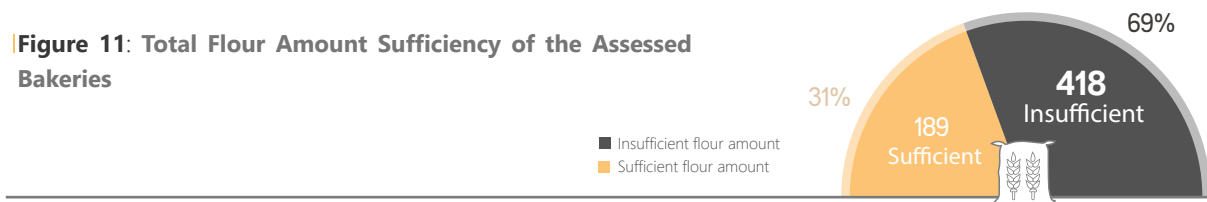
Governorate	Tartous	Rural Damascus	Deir-ez-Zor	Dar'a	Homs	Hama	Aleppo	Lattakia	Ar-Raqqa	Al-Hasakeh	Idleb
Flour	2	14	5	1	8	18	56	3	16	35	36
Fuel	2	11	5	1	2	16	46	1	2	24	3
Transportation Costs	1	3	2	0	1	1	27	0	0	1	1
Distribution Costs	1	1	2	0	1	1	27	0	0	0	0
Operational Costs	2	6	2	1	3	1	33	0	0	5	1
Yeast	0	9	2	0	1	10	44	0	0	27	15
Water	1	4	2	0	1	4	29	1	10	1	2
Other	1	0	0	0	4	0	23	0	0	0	3

## FLOUR SUPPORT

The assessment covered the sufficiency of flour in the assessed bakeries, as figures 10 and 11 show that 69% of the assessed bakeries suffer from flour deficiency, especially in Damascus, Rural Damascus, Homs and Dar'a governorates.

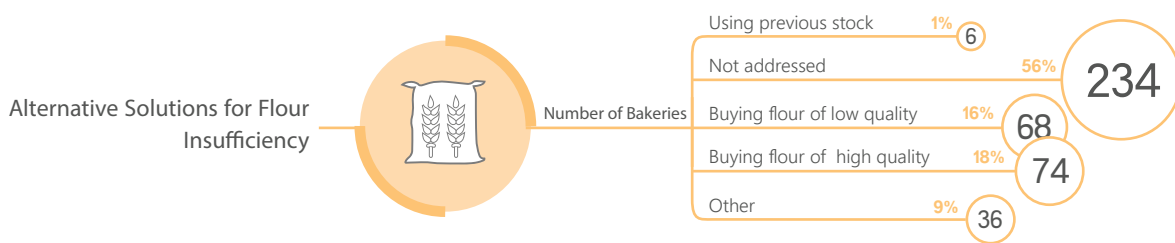


**Figure 11: Total Flour Amount Sufficiency of the Assessed Bakeries**



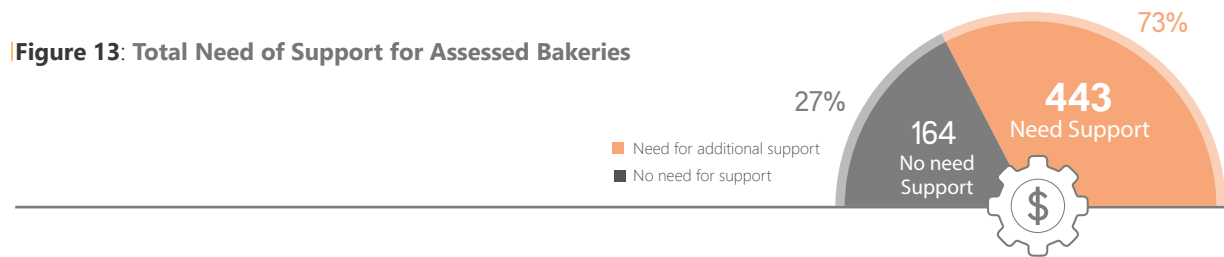
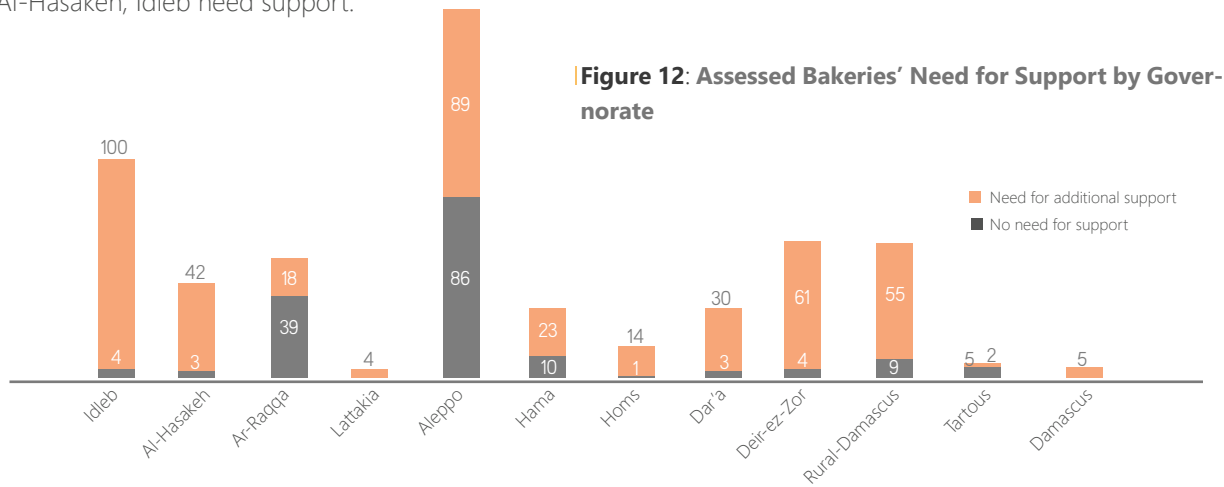
More than half 54% of the assessed bakeries could not compensate the lack of flour. Other 34% managed to compensate the lack through buying high or low quality flour, only 1% of the bakeries had a previous stock while 9% had other ways to compensate the lack of flour. As shown in heatmap 4. The largest number of bakeries that could not find a solution for flour insufficiency was in Rural Damascus, Al-Hasakeh, Aleppo governorates.

**Heatmap 4: Alternative Solutions for Flour Insufficiency of the Assessed Bakeries by Governorate**



Governorate	Damascus	Rural Damascus	Deir-ez-Zor	Dar'a	Homs	Hama	Aleppo	Lattakia	Ar-Raqqa	Al-Hasakeh	Idleb
Buying flour of high quality			4	2	1		23	2			42
Buying flour of low quality		5	18		2	1	19			1	22
Not addressed	1	37	15	28	8	15	37		33	37	22
Using previous stock		2	2				2				1
Other	4	15	2	1	3	1	2		5		3

Seventy-three percent of the bakeries still need support, whereas only 27% do not need support. All the bakeries in Damascus and Lattakia and most of the bakeries in Rural Damascus, Deir-ez-Zor, Dar'a, Homs, Hama, Al-Hasakeh, Idleb need support.



For the kind of needed support, the need for flour came first in (28% - 418) bakeries, followed by the need for fuel (24% - 354), operational costs (15% - 233), yeast (13% - 202) and machinery maintenance (11% - 161). The heatmap 5 shows the detailed need for support for non-functioning or partially functioning bakeries.

**Heatmap 5: Kind of Support that the Assessed Bakeries Need by Governorate**

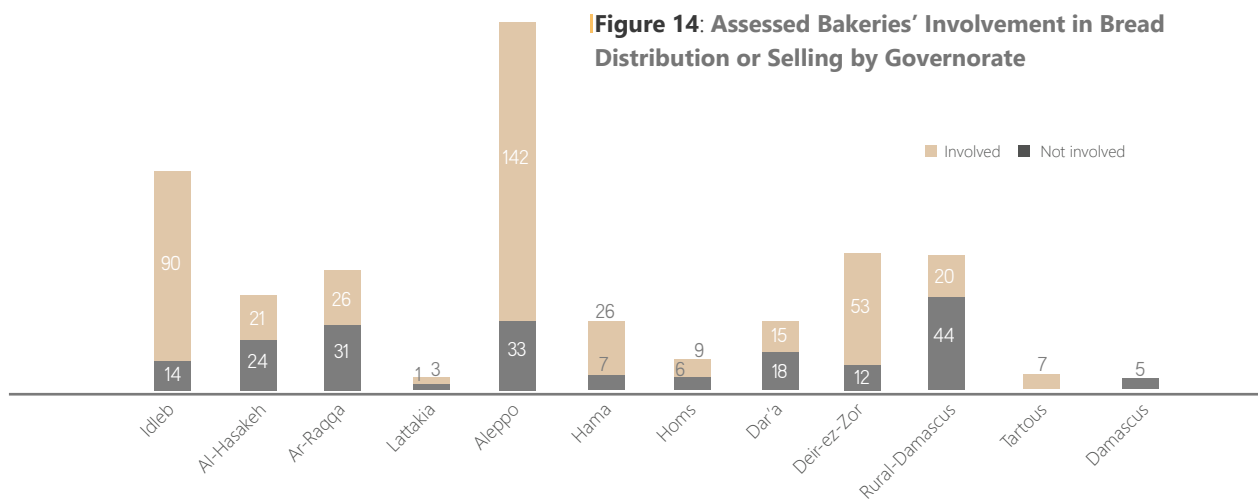


Governorate	Damascus	Tartous	Rural Damascus	Deir-ez-Zor	Dar'a	Homs	Hama	Aleppo	Lattakia	Ar-Raqqa	Al-Hasakeh	Idleb
Flour	5	1	54	57	29	14	18	84	3	18	38	97
Fuel	4	2	52	46	18	14	15	72	3	13	32	83
Yeast	2	0	25	21	9	7	6	44	3	4	27	54
Water	0	0	0	0	0	0	0	0	0	0	0	0
Transportation Costs	0	1	5	1	0	0	1	0	0	1	0	0
Machinery Maintenance	2	2	22	30	12	1	11	19	1	6	37	20
Packing Bags	2	2	6	7	3	3	1	6	1	0	9	21
Other	0	0	0	0	0	0	0	1	0	0	0	2
Distribution Costs	0	0	2	1	1	0	3	0	0	1	0	0
Building Restoration	2	0	14	14	6	2	9	4	0	0	3	2
Operational Costs	4	1	22	26	6	9	13	71	2	6	4	69

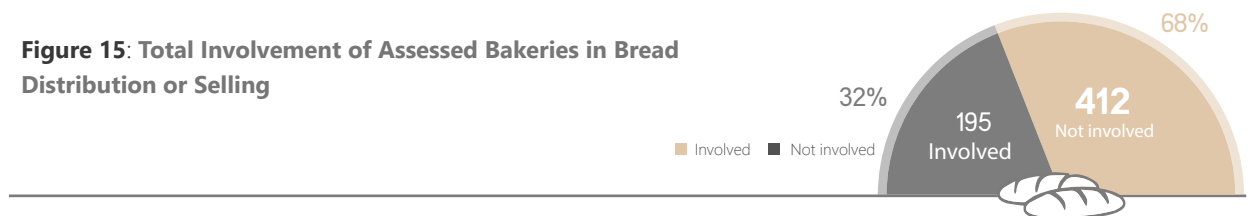
## D. Bread Distribution and Beneficiaries

Bakeries covered in this assessment account for about 6,608,812 beneficiaries, with the highest number of beneficiaries located in Aleppo Governorate followed by Idleb and Rural Damascus governorates. On the other hand, Damascus City contained the lowest number of beneficiaries due to small geographical coverage there.

Some bakeries resort to in bread distribution or bread selling as a way to cover the operational costs for bakeries that do not have a donating party. The results of the analysis show that nearly two thirds of the assessed bakeries are involved in bread distribution or selling. Noting that the total 5 bakeries in Damascus Governorate are non-functional so there is no bread distribution or selling there, on the other hand the whole 7 bakeries in Tartus Governorate are functional and involved in bread distribution. Figures 14 and 15 illustrate the involvement of the assessed bakeries in bread selling.



**Figure 15: Total Involvement of Assessed Bakeries in Bread Distribution or Selling**



No significant problems were observed regarding the accessibility of population to assessed bakeries. Majority of population 88% in all assessed governorates could access the nearby bakeries. Twenty bakeries (35%) in Ar-raqqa Governorate are not accessible at all, because some areas there are considered as military zone after PKK forces controlled those areas recently and imposed a curfew for the whole population.

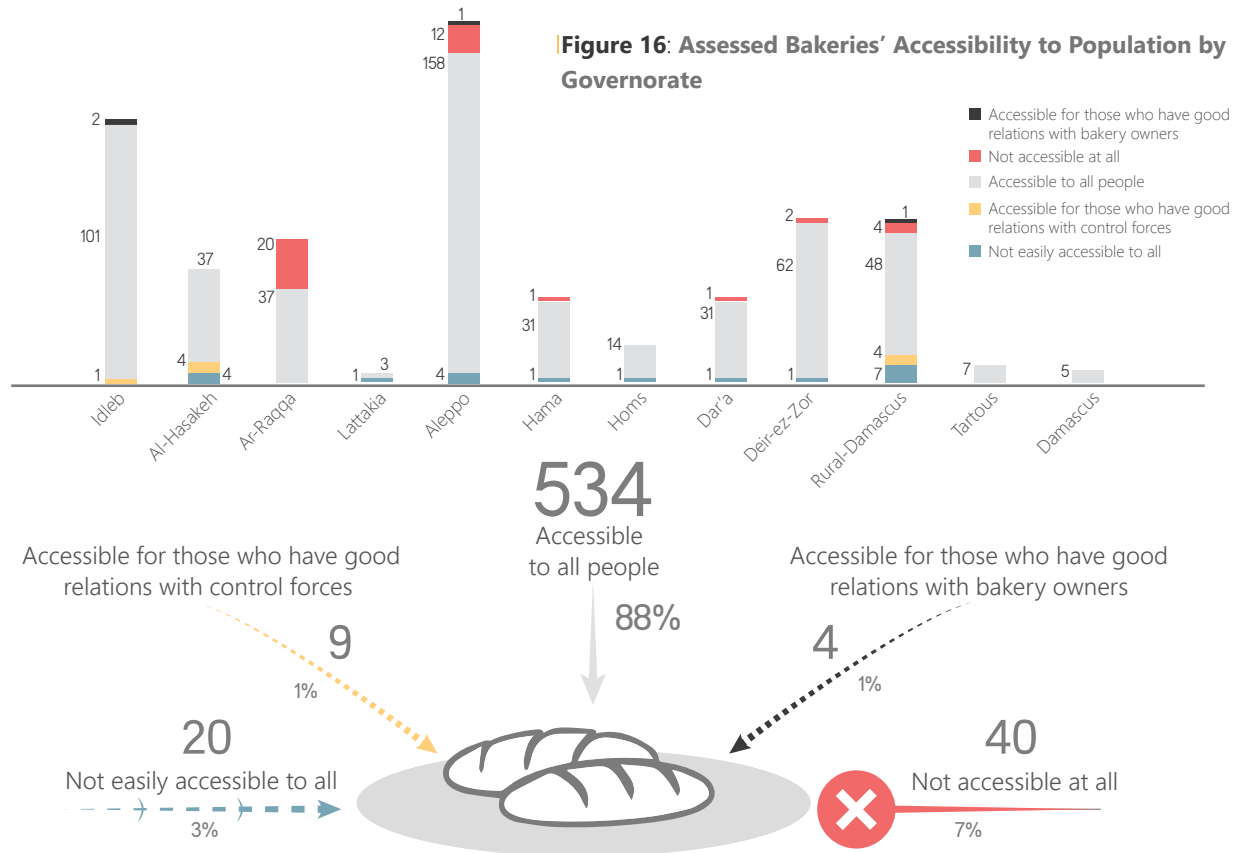
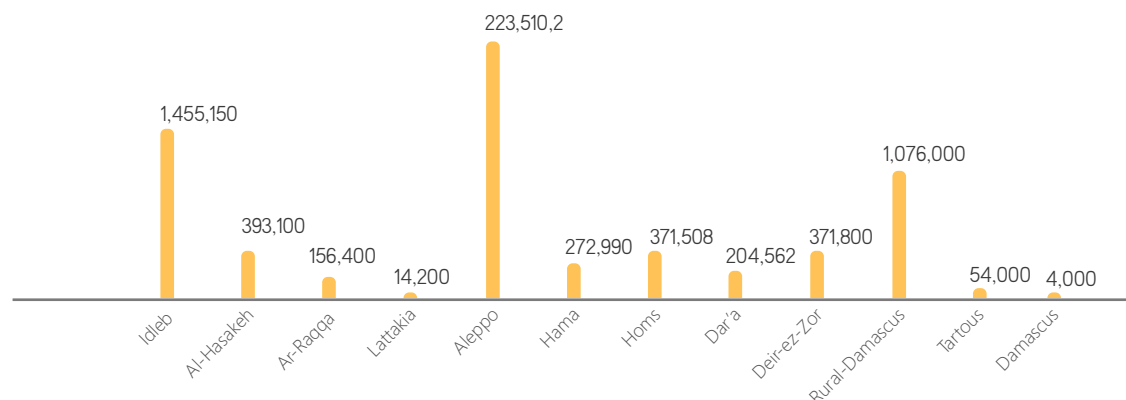


Figure 17 shows that the largest number of beneficiaries was in Aleppo, Idlib and Rural-Damascus.

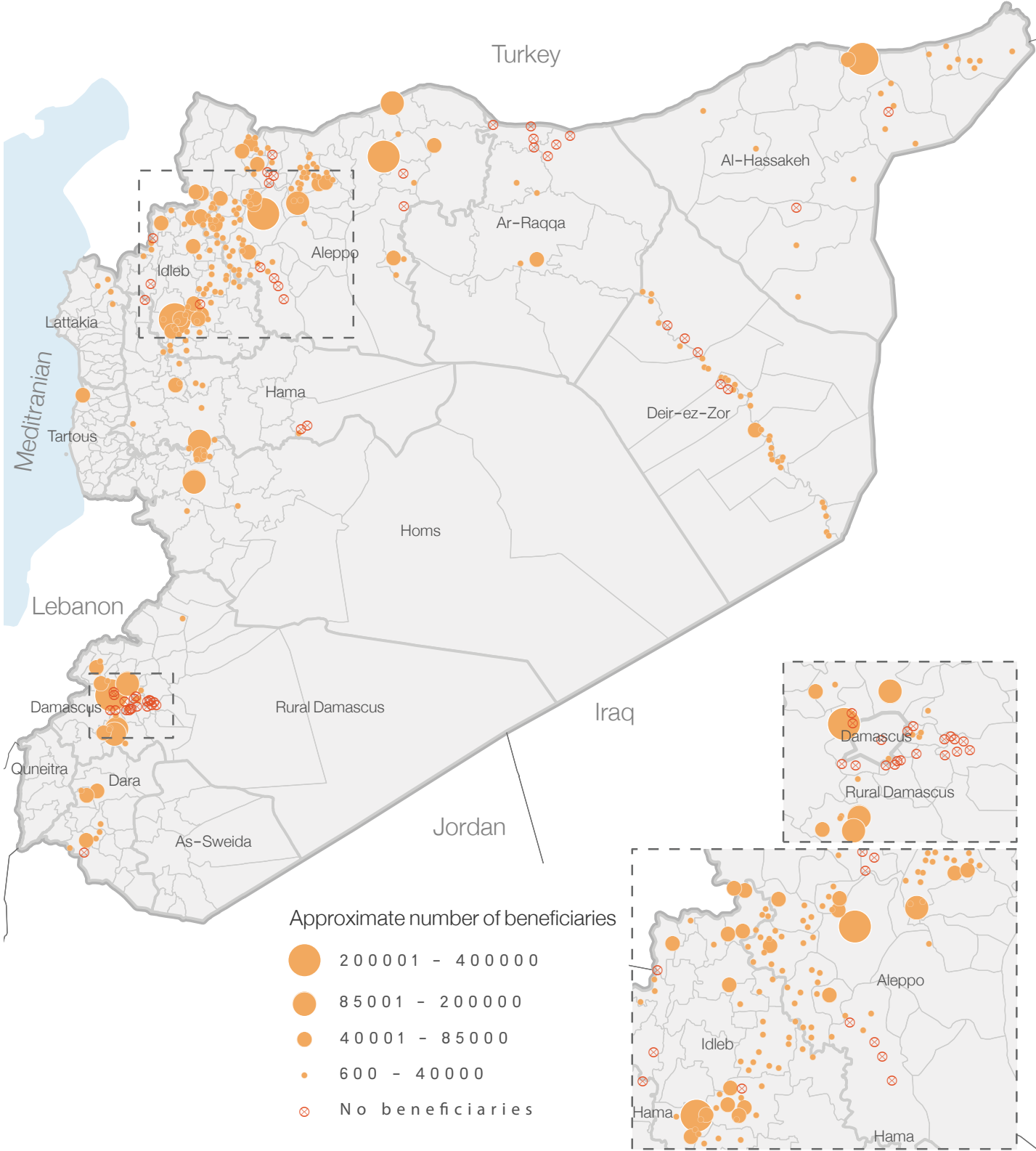
**Figure 17: The Estimated Numbers of Beneficiaries from Bakeries by Governorate**





**Map 4: Approximate Number of Beneficiaries by Village**

The highest number of beneficiaries exist in Qudsiya, Menbij, Aleppo, Quamishli and Kafr Nobol cities, where the number of beneficiaries varies between 215,000 to 400,000 individuals.



## BREAD PRICES

This sub-section includes bread prices, bread distribution and selling methods and operational costs coverage in the assessed bakeries.

More than one third of the assessed bakeries sell bread with regular market price (80 – 100) SYP, one quarter 24% of the bakeries sell bread with subsidized low price and 19% of the bakeries do not sell bread at all. More than half of the bakeries in Idleb, Al-Hasakeh, Lattakia and Homs governorates sell the bread packages with low prices. Only 1% of the assessed bakeries distribute the bread for free.

**Figure 18: Bread Selling Methods by Governorate**

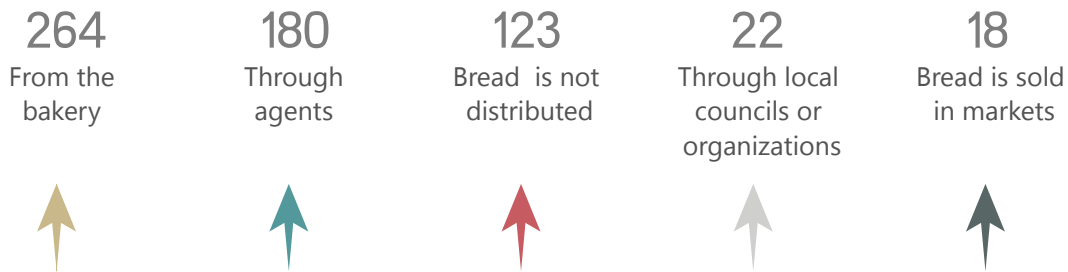
	Idleb	Al-Hasakeh	Ar-Raqqa	Lattakia	Aleppo	Hama	Homs	Dar'a	Deir-ez-Zor	Rural Damascus	Tartous	Damascus
High prices	3	3	26	0	50	3	1	10	9	9	0	0
Not Sold	11	3	20	0	20	5	0	16	8	28	0	5
Market Price	36	9	11	1	89	11	3	2	45	11	5	0
Subsidized Price	52	30	0	3	13	14	11	5	3	16	2	0
For free	2	0	0	0	3	0	0	0	0	0	0	0



Bakeries in Syria use various methods for bread distribution, the top two methods are distributing bread through the bakery itself (43%) and through representatives (30%), only 4% of the assessed bakeries distribute bread through local councils or organizations and 3% sell the bread in the markets. However, 20% of the assessed bakeries do not distribute bread at all because the bakeries are not functioning.

**Figure 19: Bread Distribution Methods by Governorate**

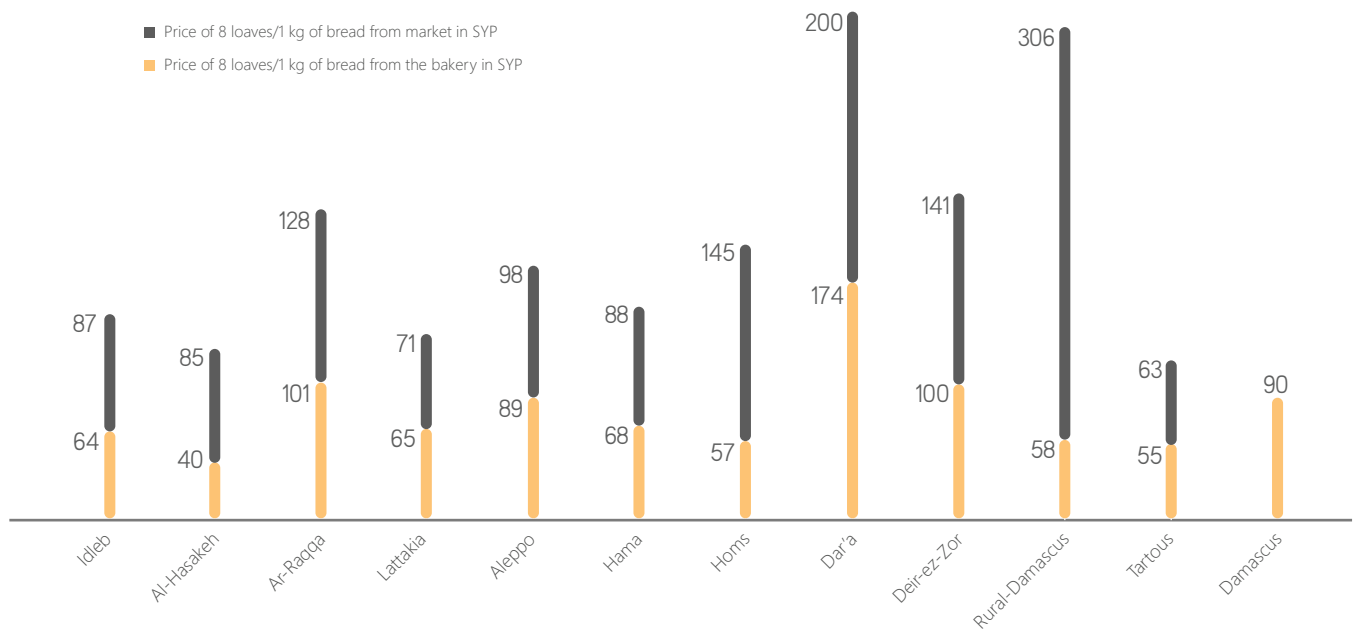
	Idleb	Al-Hasakeh	Ar-Raqa	Lattakia	Aleppo	Hama	Homs	Dar'a	Deir-ez-Zor	Rural Damascus	Tartous	Damascus
Bread is sold in markets	8	0	0	0	2	0	0	0	1	11	0	0
Through local councils or organizations	8	0	0	0	2	0	1	5	0	6	0	0
Bread is not distributed	16	3	20	0	23	5	0	16	8	27	0	5
Through agents	48	8	0	2	77	16	11	1	7	9	1	0
From the bakery	28	34	37	2	71	12	3	11	49	11	6	0



Bread is commonly sold in packages of eight loaves each. Before the crisis in Syria, flour was subsidized for public and it is still subsidized in regime-controlled areas. However, during the crisis the price of bread started to vary between areas due to different level of access to flour and other inputs. As shown in the figure 20 below, the highest bread price (300 SYP) was reported in Rural Damascus Governorate. This is a direct result of the ongoing blockade in this area of the country, preventing the delivery of aid to people in need of relief support in general, and food assistance in particular. Comparing these figures with those that had been collected during the 2014 Bakeries in Syria Assessment Report, there is a decrease in bread prices in Rural-Damascus Governorate, where the prices had reached 420 SYP and to 2014 DYNAMO where the price had reached 700 SYP. On the other hand, bread prices have increased in all other governorates because of two facts, first, that bread price has increased even in regime-controlled areas and second is tightening the siege in the other governorates.

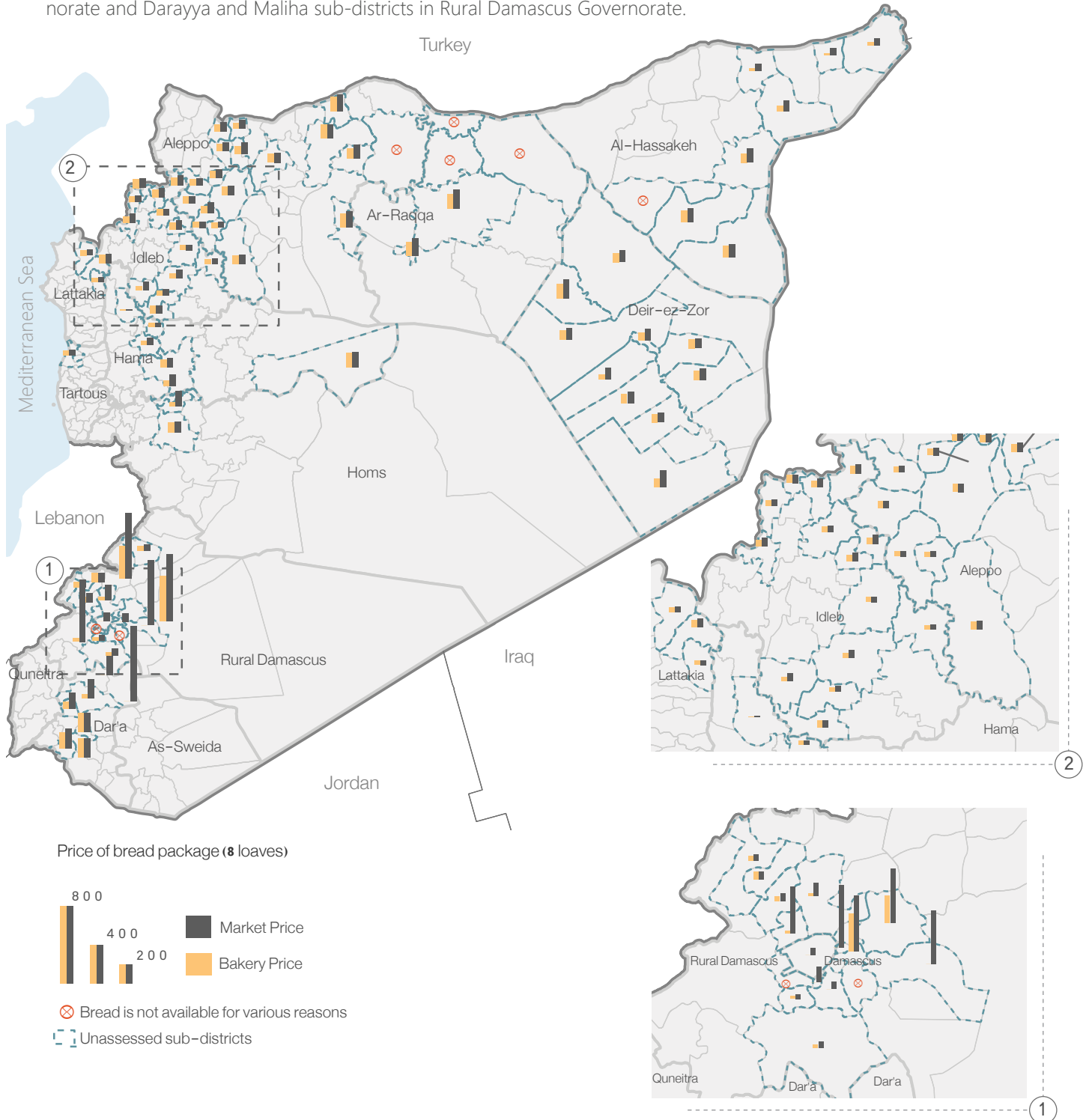
Bread recorded higher prices in the market than in the bakeries. The price of eight loaves/1 kg of bread from the market in Rural Damascus exceeded 300 SYP whereas in the bakery it was less than 60 SYP. Dar'a Governorate recorded the second highest price 200 SYP in the market and 174 SYP in the bakery. The lowest prices ever were recorded in Al-Hasakeh bakeries 40 SYP. The vast price difference between bakeries and the market refers to insufficient production of the bakeries compared to the need of the people of the region and especially in the besieged areas.

**Figure 20: Bread Prices in the Bakery and in the Market**



**Map 5: Bread Prices by Sub-district**

It is clear from map 5 that bread prices in the market are higher than bakery prices in all sub-districts. In addition, the sub-districts of Arbin, Kafr Batna, Duma and Nashabiyeh in Rural Damascus Governorate suffer from high bread prices between 600 – 800 SYP per package in the market. Some sub-districts suffer from complete absence of bread in Suluk, Ein Issa and Tell Abiad in Ar-Raqqa Governorate, Sarin Sub-district in Aleppo Governorate and Darayya and Maliha sub-districts in Rural Damascus Governorate.



It is crucial for all functioning / partial functioning bakeries to cover their operational costs in order to continue producing bread for population. This assessment covered ways the bakeries use to overcome the operational costs obstacle.

Heatmap 6 below shows that 56% of the bakeries covered their operational costs by selling bread, 31% of the bakeries by receiving support from multiple sources (e.g. the same source providing them with flour, local councils, etc.). However, 13% of the bakeries could not cover their operational costs.

### Heatmap 5: Operational Costs Coverage by Governorate



Governorate	Damascus	Tartous	Rural Damascus	Deir-ez-Zor	Dar'a	Homs	Hama	Aleppo	Lattakia	Ar-Raqqa	Al-Hasakeh	Idleb
Selling bread	0	7	27	57	12	12	29	155	4	37	41	91
Support from local organizations	0	0	8	0	2	3	1	6	1	0	0	4
Support from international organizations	0	0	1	0	0	0	0	1	0	0	0	2
Support from local councils	0	0	5	0	3	6	1	20	3	0	0	5
Support from control forces	0	0	5	3	1	0	0	42	1	2	2	5
The same party that provides the flour	0	1	13	4	4	2	3	38	0	1	3	3
Support from the Syrian regime	0	4	9	0	0	1	11	0	0	5	5	0
Operational costs are not covered	3	0	27	17	17	0	3	10	0	15	3	12
Other	3	0	13	5	0	2	1	5	0	5	1	2

# BAKERIES IN SYRIA

## ASSESSMENT REPORT

ISSUED BY: INFORMATION MANAGEMENT UNIT





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