

BAKERIES IN SYRIA ASSESSMENT REPORT

December 2014



KEY FINDINGS COVER:

OVERVIEW OF BAKERIES TYPES

FUNCTIONING

REASONS FOR NON-FUNCTIONING

FUNCTIONING BAKERIES

NUMBER OF BENEFICIARIES

BREAD PRODUCTION CAPACITY

SOURCES OF FLOUR AND SUPPORT

BREAD PRICE

SUMMARY

As the crisis continues, humanitarian needs inside Syria are increasing across all sectors. The Syria 2014 Multi Sector Needs Assessment (MSNA) estimated that a total of 4.5 million people were in need of food assistance. The Information Management Unit (IMU) of the Assistance Coordination Unit (ACU) conducted an assessment of bakeries in Syria in order to inform the response provided by aid actors within the food security sector. More specifically, the assessment aimed to collect data on the type and the status of functioning of bakeries, as well as the number of beneficiaries; the bread production capacity; sources of flour and support; and bread prices.

A total of 434 bakeries in 72 sub-districts across 10 governorates were assessed in September 2014. Data collection was carried out through IMU's network of enumerators based at sub-district level in Syria. This assessment was funded by the ACU and carried out in consultation with partners in the Food Security and Livelihoods working groups coordinated by the Food and Agriculture Organisation (FAO). Key findings presented in further details in this report include:

- The majority of assessed bakeries were private bakeries (71%), and about quarter of assessed bakeries were public (24%). The remaining were joint bakeries (5%). Public bakeries were reported as the source of bread for 2,016,243 beneficiaries and private bakeries reportedly provided bread for 2,711,025 beneficiaries.
- The highest proportion of non-functioning bakeries were found in Rural-Damascus Governorate (79%), followed by Hama (65%) and Deir-ez-Zor (45%) Governorates. The most cited reason for bakeries to stop functioning in these areas was the continuous shelling and intensification of clashes. This assessment identified 11 completely destroyed bakeries, out of which 45% were public bakeries, and 36% were located in Rural-Damascus Governorate. Overall, the main reported reason for bakeries to have stopped functioning is shortage of inputs, with first lack of flour (44%), followed by lack of fuel (34%) and yeast (22%).
- Public bakeries represented 52% of the bread production capacity, followed by private bakeries with 46% and joint bakeries with 2%. The widest bread production gap among functioning bakeries was reported in Rural-Damascus Governorate (85%), where there is no access to flour and other inputs due to the ongoing siege. A considerable bread product gap was reported within Deir-ez-Zor Governorate (75%), also related to the difficult for bakeries to access inputs, notably after the Islamic State of Iraq and the Levant (ISIL) took control over this area, causing aid delivery provided by relief organizations to stop for security reasons.
- Non-Governmental Organisations were reported as the main source of flour (41%) for assessed bakeries. ISIL was reported as the second main source of flour (28%), as it provided flour to bakeries located in areas under its control. To mitigate shortages of flour and subsequent bread production gaps, a great majority (75%) of non-functioning bakeries reported transferring a portion of their flour to functioning ones, while a quarter of non-functioning bakeries (25%) reported distributing their flour to the local population for domestic consumption.
- Selling bread is the main source to fund the operational costs for (86%) of functioning bakeries, while a small proportion (13%) of these bakeries reported also receiving funding from the source providing them with flour. Almost no functioning bakeries (1%) reported funding their operational costs from selling a part of their flour.
- Bread is usually sold in packages of 8 loaves each. Among assessed bakeries, 4 private bakeries (3 in Deir-ez-Zor Governorate and & one in Idlib Governorate) are distributing bread to the local population for free. Bread prices were reported as acceptable in all assessed areas except for Rural-Damascus Governorate which recorded the highest price for bread (16 times higher than other governorates) due to the blockade preventing aid delivery in this area.

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.

CONTENTS

SUMMARY	1
LIST OF ACRONYMS AND ABBREVIATIONS	3
GEOGRAPHICAL CLASSIFICATIONS	3
LIST OF TABLES, FIGURES AND MAPS	3
INTRODUCTION	4
METHODOLOGY	5
ASSESSMENT SAMPLE	5
ASSESSMENT TOOLS	6
DATA COLLECTION	6
DATA MANAGEMENT AND ANALYSIS	6
LIMITATIONS	6
KEY FINDINGS	7
OVERVIEW OF ASSESSED BAKERIES	7
PUBLIC AND PRIVATE BAKERIES	7
STATUS OF FUNCTIONING	7
REASONS FOR BAKERIES TO STOP FUNCTIONING	9
FUNCTIONING BAKERIES	10
NUMBER OF BENEFICIARIES	10
BREAD PRODUCTION CAPACITY AND GAPS	11
SOURCES OF FLOUR AND SUPPORT	13
BREAD PRICES	14
CONCLUSION	16

The **Information Management Unit (IMU)** aims to strengthen the decision-making capacity of aid actors responding to the Syrian crisis by collecting, processing, and sharing information about the humanitarian situation in Syria. For this purpose, the IMU has a wide network of enumerators who have been recruited depending on specific criteria such as their level of education, the web of their social relationships with different key sources of information, as well as their ability to work under pressure and to communicate in an efficient manner. IMU collects data which is difficult to access by international aid actors, and it releases different types of information outputs including maps, daily situation reports, flash reports on specific issues, camp monitoring reports, monthly reports (food-price index), and thematic reports. For more information and to access to IMU products, please visit: www.acu-sy.org. You can also write to us directly at: imu@acu-sy.org and call us on: +90-342-22-010/77/88/99.

LIST OF ACRONYMS AND ABBREVIATIONS

ACU	Assistance Coordination Unit
IDP	Internally Displaced Person
IMU	Information Management Unit
INGO	International Non-Governmental Organisation
ISIL	Islamic State of Iraq and the Levant
LC	Local Council
LNGO	Local Non-Governmental Organisation
SARC	Syrian Arab Red Crescent
SHARP	Syrian Arab Republic Humanitarian Assistance Response Plan
WFP	World Food Program

GEOGRAPHICAL CLASSIFICATIONS

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

LIST OF TABLES, FIGURES AND MAPS

Table 1: Assessment sample	5
Table 2: Number of assessed bakeries by type	7
Table 3: Number of beneficiaries covered by bakeries by governorate	10
Table 4: Functioning bakeries' daily capacity per metric ton	11
Figure 1: Overall proportion of assessed bakeries by type	7
Figure 2: Main reasons for bakeries to stop functioning	9
Figure 3: Status of functioning of assessed bakeries by governorate	9
Figure 4: Number of reported destroyed bakeries at governorate level	9
Figure 5: Number of non-functioning bakeries due to lack of flour	10
Figure 6: Number of non-functioning bakeries due to lack of yeast	10
Figure 7: Number of reported non-functioning bakeries due to lack of fuel	10
Figure 8: Overall proportion of beneficiaries by type of assessed bakeries	11
Figure 9: Gaps in the production of assessed functioning bakeries	13
Figure 10: Flour sources	13
Figure 11: Flour (re)distribution	13
Figure 12: Means to cover operational costs	14
Figure 13: Bread prices per governorate	14
Map 1: Assessed bakeries	5
Map 2: Status of functioning of assessed bakeries at sub-district level	8
Map 3: Proportion of beneficiaries for assessed functioning bakeries by sub-district	12
Map 4: Average bread price at sub-district level	15

INTRODUCTION

The ongoing crisis in Syria is considered as one of the most severe humanitarian emergency. In 2014, the conflict has further intensified and concomitantly humanitarian access became more restrained, notably in areas under the control of the Islamic State of Iraq and the Levant (ISIL) such as Deir-ez-Zor, Al-Hasakeh, Ar-Raqqa, and eastern parts of Aleppo. The 2015 Humanitarian Needs Overview for Syria indicates that humanitarian needs have increased twelve-fold since the beginning of the Syrian crisis, with 12.2 million people now in need of humanitarian assistance, including more than 5 million children. The Syria Multi-Sectorial Needs Assessment (MSNA) released in October 2014, estimated that a total of 4.5 million people are in need of food, and a similar estimate (4.5 million) was reported through the dynamic monitoring system (DYNAMO) issued by the Information Management Unit (IMU) of the Assistance Coordination Unit (ACU).

In this context, the international humanitarian community has strengthened its response in order to assist populations in need within Syria. In 2014, the United Nations Security Council passed two resolutions aiming to improve the humanitarian situation in Syria, by increasing channels for the delivery of humanitarian aid into Syria. Resolution 2139 calls on all parties to the Syrian conflict to allow unhindered humanitarian access for United Nations (UN) agencies and their partners, including across conflict lines in order to ensure that aid reaches people through the most direct routes. In July 2014, the UN made a step further in its humanitarian engagement in Syria, and the UN Security Council approved Resolution 2165. This resolution authorises cross-border operations and cross-line access with the only requirement of informing the Syrian government on these activities.

These UN resolutions have helped alleviating the impact of the ongoing conflict on Syrian communities, notably in terms of the availability of food. Within the framework of the inter-agency humanitarian assistance provided to the people affected by the crisis in Syria, the Food and Agriculture Organization of the United Nations (FAO) leads and coordinates the food sector response provided by a broad range of international non-governmental organizations (INGO) and local aid actors. In consultation with operational aid actors participating in the Food Security and Livelihood sector working group, IMU carried out an assessment to gather information about bakeries in Syria with the aim to support the planning and delivery of support to bakeries.

The Assessment carried out by IMU aims to inform the food sector response for the ongoing Syrian crisis by collecting, analysing and sharing information at sub-district level on bakeries in Syria. The assessment aimed specifically to collect data on the type and the status of functioning of bakeries, as well as the number of beneficiaries; the bread production capacity; sources of flour and support; and bread prices.

For this assessment, IMU applied a combination of quantitative and qualitative methods to collect data: key-informant interviews, direct field observations, testimonies of local inhabitants and available secondary data from previous assessments, and in particular data from IMU's DYNAMO. The methodology designed and used for this assessment is outlined in the first section of the report. This assessment covered a total of 434 bakeries located in ten governorates including 72 sub-districts. The data collection phase started on September 1st, 2014 and was completed within one month. Data collection was carried out through IMU's network of enumerators based at sub-district level throughout Syria.

This report presents the key findings from the assessment, which are organised in two main sub-sections. First, the report comprises an overview of all assessed bakeries in terms of type, status of functioning and reasons for non-functioning. The next section provides a more in-depth analysis of assessed functioning bakeries.

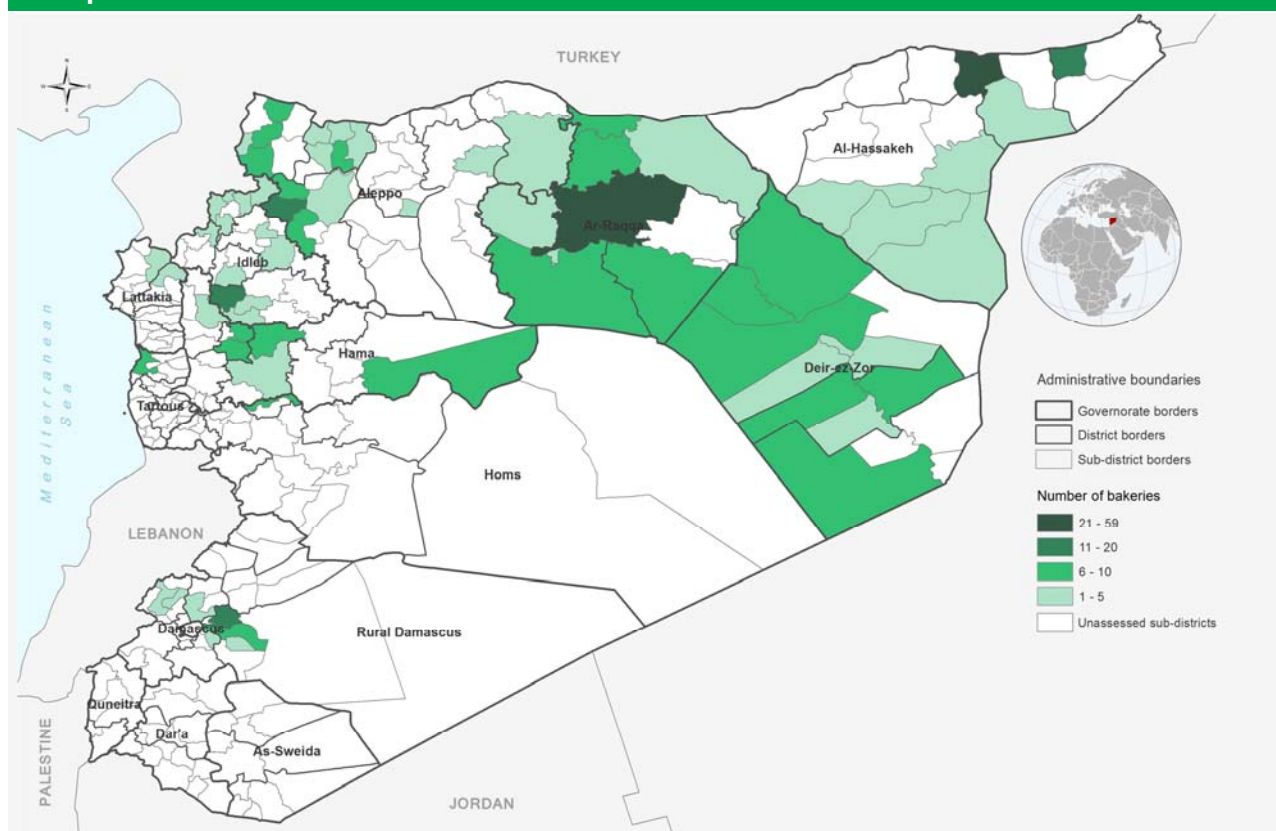
METHODOLOGY

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, 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.

ASSESSMENT SAMPLE

The assessment aimed to cover samples of all kinds of bakeries (functioning/non-functioning) throughout Syria but the ongoing high-intensity protracted conflict limited the scope of data collection. Nonetheless, the assessment sample included 434 bakeries located in 72 sub-districts in ten governorates: Aleppo, Al-Hasakeh, Ar-Raqqqa, Deir-ez-Zor, Hama, Homs, Idleb, Lattakia, Rural-Damascus, and Tartus. Only one bakery could be assessed in Damascus Governorate, thus this governorate was subsequently removed from the assessment sample.

Map 1: Assessed bakeries



It should be noted that the assessment sample 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.

Table 1: Assessment sample

Governorate	Al-Hasakeh	Aleppo	Ar-Raqqqa	Deir-ez-Zor	Hama	Homs	Idleb	Lattakia	Rural-Damascus	Tartus	Total
Sub-district	7	16	8	10	6	1	12	2	9	1	72
# assessed bakeries	84	87	72	69	34	6	32	4	39	7	434

According to the latest DYNAMO data, 25% of assessed public bakeries (177 bakeries) were still functioning, 70% of private bakeries (498 bakeries) were still functioning and 5% of joint bakeries (38 bakeries) were still functioning.

ASSESSMENT TOOLS

For the purpose of this assessment, IMU designed a structured questionnaire. First, IMU produced an initial draft of the questionnaire covering a broad range of issues related to the status and needs of functioning /non-functioning bakeries in Syria. The draft questionnaire was reviewed together with some partners as well as PMU. Second, IMU elaborated the final questionnaire, notably by including questions which had been prioritised by partners during the consultation process.

The questionnaire was administered by enumerators during key informant interviews with the owners and managers of the bakeries. 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 September 1, 2014 and was completed within two weeks. Data collection was carried out through IMU's network of enumerators based at sub-district level throughout Syria. In total, 93 enumerators contributed to this assessment. Enumerators selected by IMU have an extensive knowledge of the sub-district in which they are based. For instance, they knew or could quickly get the contact of each bakery owner in the sub-district. 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 collected data in Excel format and proceeded with data cleaning and validation. Upon consolidation of the collected data, IMU data analysis team proceeded with data visualisation by identifying the required tables, graphs, and maps which will feed into the analysis of assessment findings. Data visualisation was conducted using MS Excel program. 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 outlined in the conclusion.

IMU Reporting Officers produced a first draft of the report and submitted it for review by partners within the food sector. The feedback from partners aimed to help refining the analysis and recommended intervention priorities. 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:

- While the direct presence of IMU enumerators at sub-district level facilitated their access to bakeries, the prevailing high-level of insecurity in some areas limited their ability to carry out the assessment.
- 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.
- Qualitative information gathered by enumerators through targeted interviews and direct observations was very useful for the analysis presented in this report, but it was not without limitations. To mitigate data errors, IMU triangulated the data collected for this assessment with the quantitative data collected through the Dynamic Monitoring (DYNAMO) system.

KEY FINDINGS

This section presents the main results from the assessment, which are structured into two sub-sections. First, the report comprises an overview of all assessed bakeries in terms of type, status of functioning and reasons for non-functioning. The next section provides a more in-depth analysis of assessed functioning bakeries.

OVERVIEW OF ASSESSED BAKERIES

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

PUBLIC AND PRIVATE BAKERIES

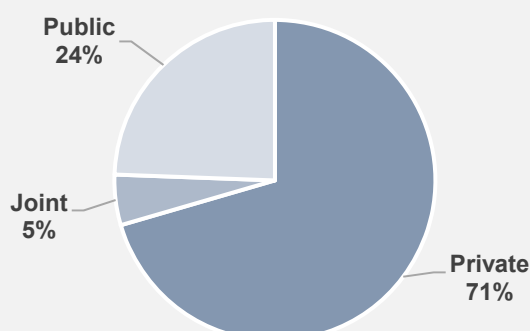
This assessment covers three types of bakeries in Syria. The first type is the public bakeries that were owned by the government and had high capacity. However, they are now run by different controlling entities. The second type is the private bakeries owned by individuals, usually with a medium/ low capacity, and with private funding. Joint bakeries are bakeries used to be owned by the government, invested and funded by individuals. The case now is a partnership between individuals and the controlling entities in those regions. The majority of assessed bakeries were private bakeries (71%-306 bakeries), and about quarter of assessed bakeries were public (24%-106 bakeries). The joint bakeries were (5%-22 bakeries).

Table 2: Number of assessed bakeries by type

Governorate	Al-Hasakeh	Aleppo	Ar-Raqqa	Deir-ez-Zor	Hama	Homs	Idleb	Lattakia	Rural-Damascus	Tartous	Total
Private Bakeries	62	69	40	44	27	2	17	3	37	5	306
Public Bakeries	7	17	29	25	7	4	12	1	2	2	106
Joint Bakeries	15	1	3				3				22
Grand Total	84	87	72	69	34	6	32	4	39	7	434

The high proportion of private bakeries 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.

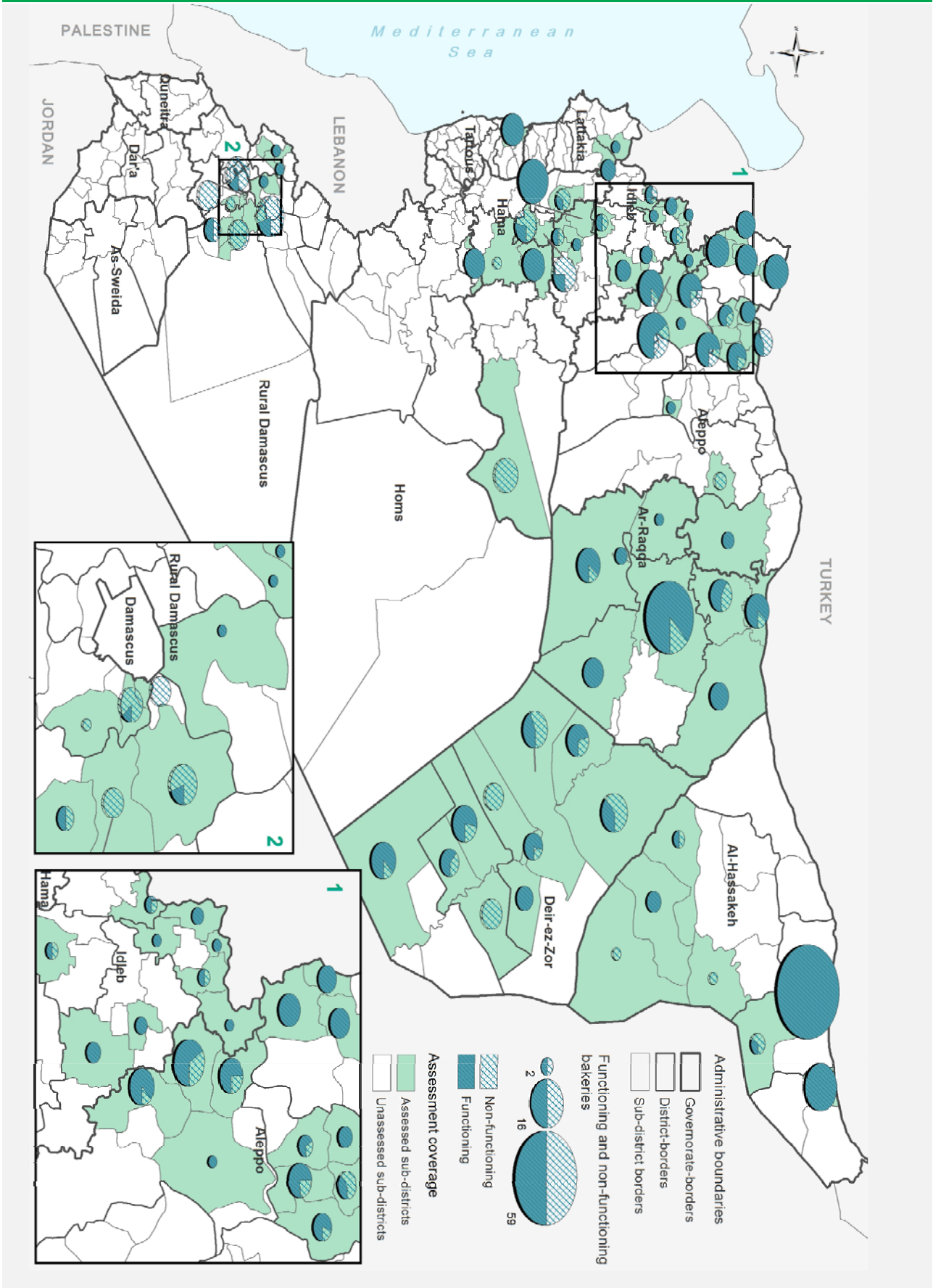
Figure 1: Overall proportion of assessed bakeries by type



STATUS OF FUNCTIONING

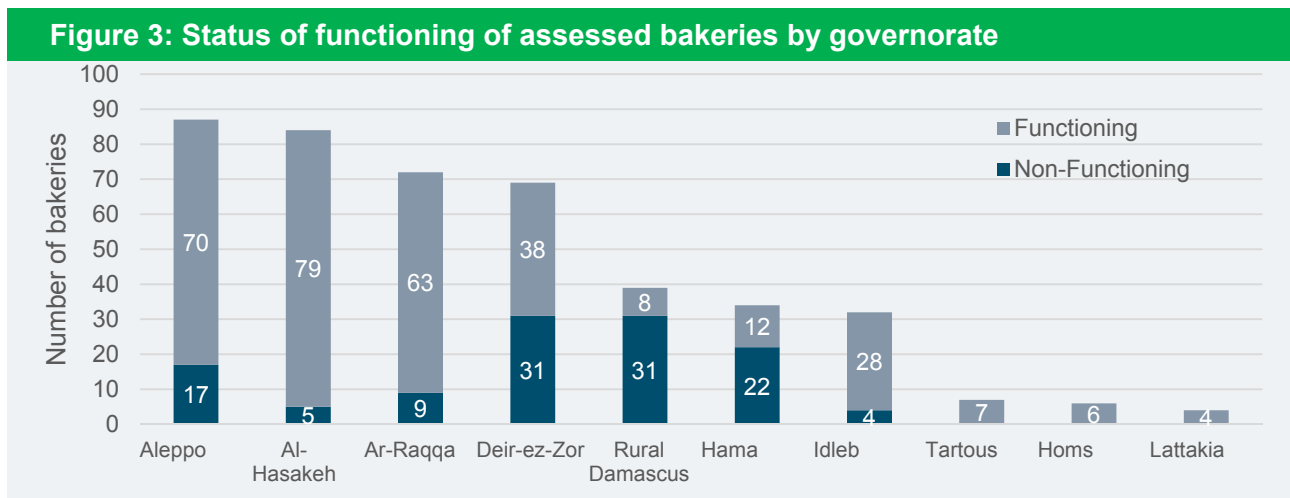
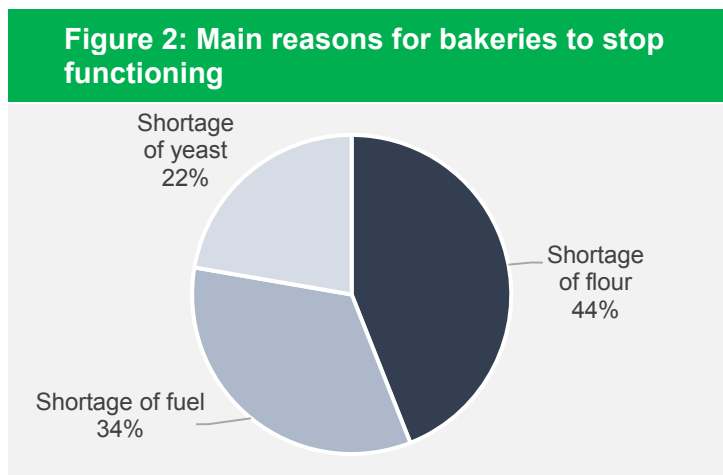
As part of the assessment, data was collected on the number of functioning/non-functioning bakeries. The highest proportion of non-functioning bakeries were based in the Rural-Damascus Governorate (79%-31 bakeries), followed by Hama Governorate (65%-22 bakeries), and Deir-ez-Zor Governorate (45%-31 bakeries).

Map 2: Status of functioning of assessed bakeries at sub-district level



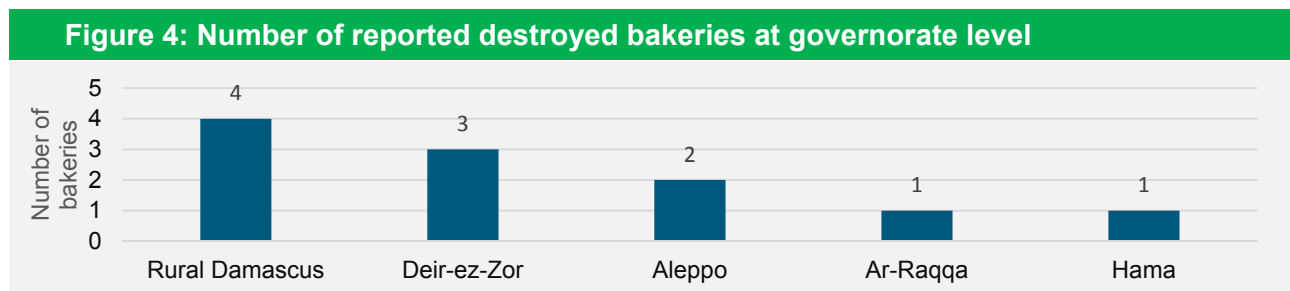
The main reason for bakeries to have stopped functioning in these areas is the continuous shelling and intensification of clashes which are causing destruction and damage to bakery structures. Other main reasons for bakeries to stop functioning is the lack of raw materials for the production of bread (see sub-section below).

Based on the information available in the latest DYNAMO, 13% of the non-functioning bakeries were public, 84% were private, and 3% were joint bakeries.



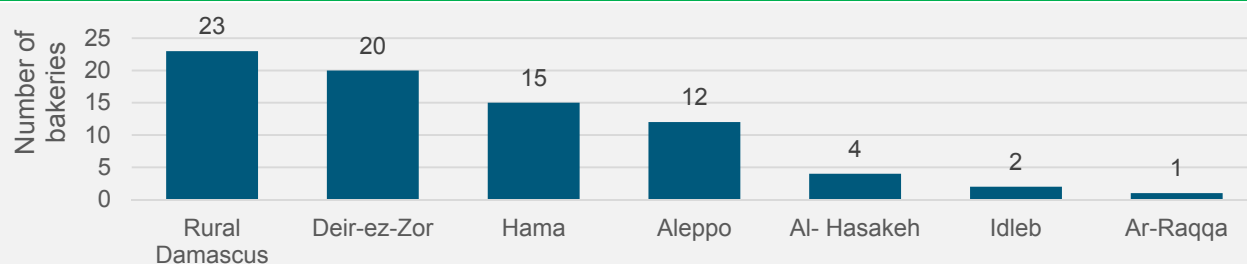
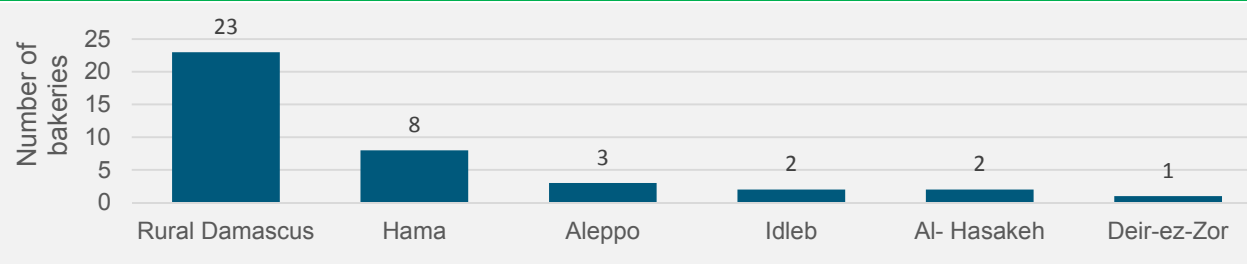
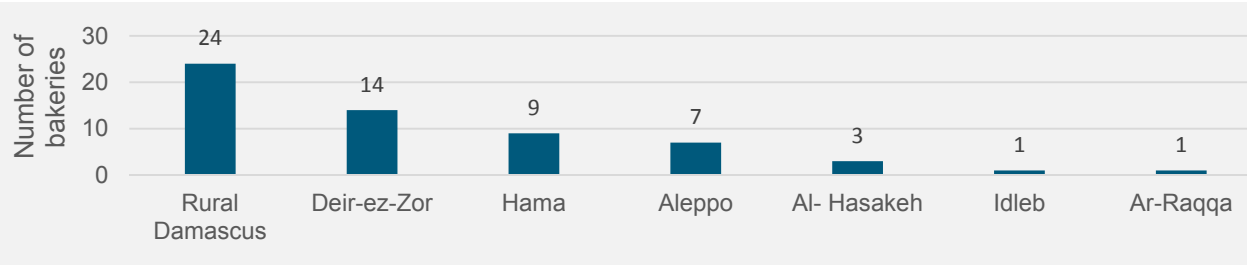
REASONS FOR BAKERIES TO STOP FUNCTIONING

Continuous bombardment has led to the destruction of many bakeries. This assessment identified 11 completely destroyed bakeries out of which (45% - 5 bakeries) were public, and over a third (36% - 4 bakeries) were located in Rural-Damascus Governorate.



Aside from structural damage and destruction, the main reasons for bakeries to stop functioning were related to the shortage of raw materials. As shown in the figures 5 to 7 below, the shortage of flour was the most reported reason for bakeries to stop operating (44%), followed by shortage of fuel (34%), and shortage of yeast (22%).

The bakeries located in Rural Damascus Governorate were reportedly the most affected by the conflict in terms of lack of production inputs. Shortage of flour in this area of the country has caused one third (33%) of bakeries to stop operating out of the total number of all assessed non-functioning bakeries. A majority (58%) of bakeries not functioning due to lack of yeast were also in located in Rural-Damascus Governorate, and a high proportion (41%) of non-functioning bakeries as a result to fuel shortage out of all assessed bakeries were also identified in Rural-Damascus Governorate.

Figure 5: Number of non-functioning bakeries due to lack of flour**Figure 6: Number of non-functioning bakeries due to lack of yeast****Figure 7: Number of reported non-functioning bakeries due to lack of fuel**

FUNCTIONING BAKERIES

This section provides further detailed analysis of the situation of bakeries which were identified as still functioning at the time of the assessment. In particular, this section focuses on the number of beneficiaries, the bread production capacity and gaps of functioning bakeries, as well as the sources of flour and additional support received by functioning bakeries, and finally bread prices.

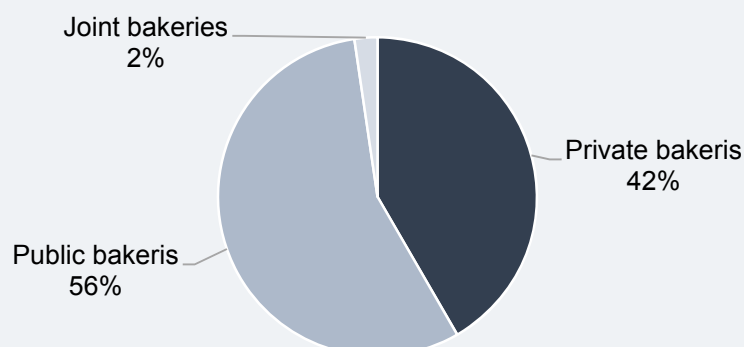
NUMBER OF BENEFICIARIES

Bakeries covered in this assessment account for about 4,850,000 beneficiaries, including 20% of beneficiaries located in Idleb Governorate - although the number of bakeries is not high due to the relatively easier access to raw materials in this area of the country delivered by various local and international organizations across the Turkish border.

Table 3: Number of beneficiaries covered by bakeries by governorate

Governorate	Al-Hasakeh	Aleppo	Ar-Raqqa	Deir-ez-Zor	Hama	Homs	Idleb	Lattakia	Rural-Damascus	Tartous	Total
Beneficiaries	424,200	866,670	390,985	826,063	506,000	114,500	961,000	38,000	647,000	65,000	4,839,418

Overall, as shown in figure 8 below, there is a fairly balanced proportion of public (56%; 2,016,243 beneficiaries) and private (42%; 2,711,025 beneficiaries) bakeries in their population coverage.

Figure 8: Overall proportion of beneficiaries by type of assessed bakeries

BREAD PRODUCTION CAPACITY AND GAPS

The production capacity of bakeries is related to its size, the number of functioning furnaces and the duration of bread production process. Usually, the capacity of each public bakery is stated on its outside banner which makes it easier to obtain this information. As for private bakeries, the owner of each bakery is often the source of such information. As shown in the table below, the overall capacity of the assessed bakeries per day was (1989 metric tons), and was classified as follows:

- Public bakeries had (52%) of assessed bakeries' capacity.
- Private bakeries had (46) of assessed bakeries' capacity.
- Joint bakeries had (2%) of assessed bakeries' capacity.

Similar findings were reported in the latest DYNAMO released by the IMU.

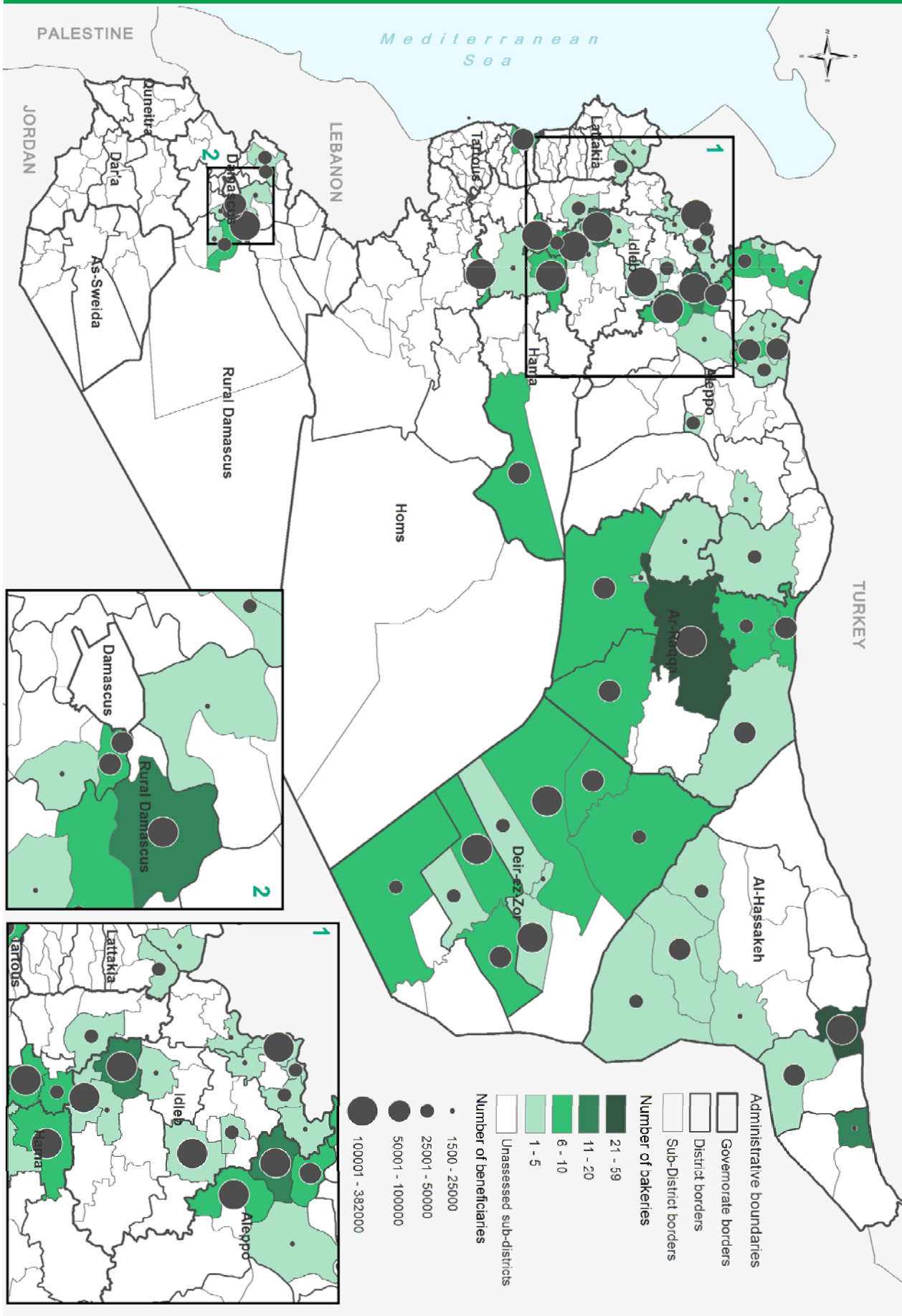
Table 4: Functioning bakeries' daily capacity per metric ton

Governorate	Al-Hasakeh	Aleppo	Ar-Raqqa	Deir-ez-Zor	Hama	Homs	Idleb	Lattakia	Rural-Damascus	Tartous	Total
Private	130.1	203.22	98.7	144.2	64.3	2.8	100.2	18	136.4	14	911.92
Public	98.5	213.5	152.6	225.1	124	19	163	3	9.5	19	1,027.2
Joint	10.25	11	8.5				20				49.75
Total	238.85	427.72	259.8	369.3	188.3	21.8	283.2	21	145.9	33	1,988.87

In order to identify the gap between the initial bread production capacity of bakeries and their current level of bread production, enumerators were asked to identify the amount of production over the last month for each assessed bakery to be compared with the estimated productivity during the month.

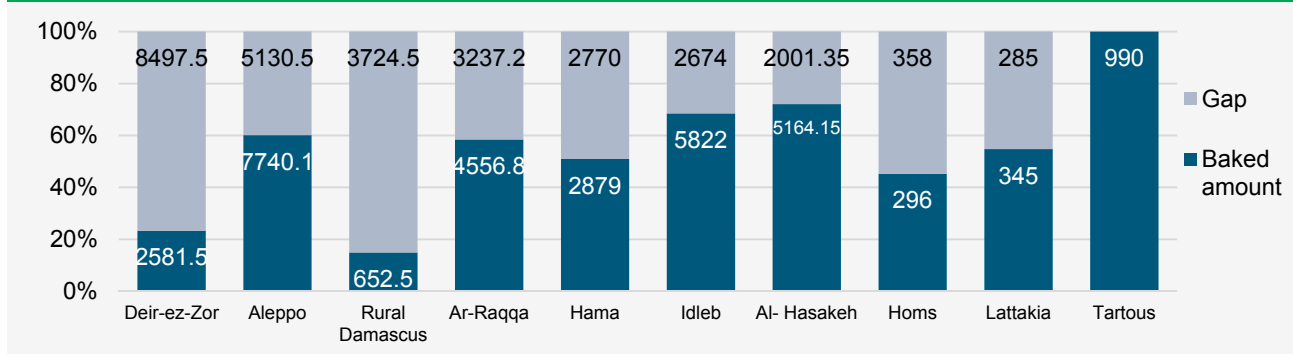
Changes in the bread production capacity of assessed bakeries are generally related to the difficulty in obtaining flour, shortage of fuel, electricity and yeast, as well as insecurity. The widest bread production capacity was reported in Rural-Damascus Governorate (85%), where the ongoing siege impedes access to flour and other inputs required for producing bread. Similarly, a significant reduction (75%) in bread production capacity was reported for bakeries located within Deir-ez-Zor Governorate due to the difficulty in accessing raw materials, especially after ISIL took control of this area causing most relief organizations to stop operating there for security reasons.

Map 3: Proportion of beneficiaries for assessed functioning bakeries by sub-district



The UN Security Council Resolution 2165 provided an opportunity to enter limited quantities of flour to some of the besieged areas, especially in Rural-Damascus, thus relatively contributed to reduce the suffering of civilians and facilitated the accessibility of flour convoys across the Turkish border to the northern regions of Syria.

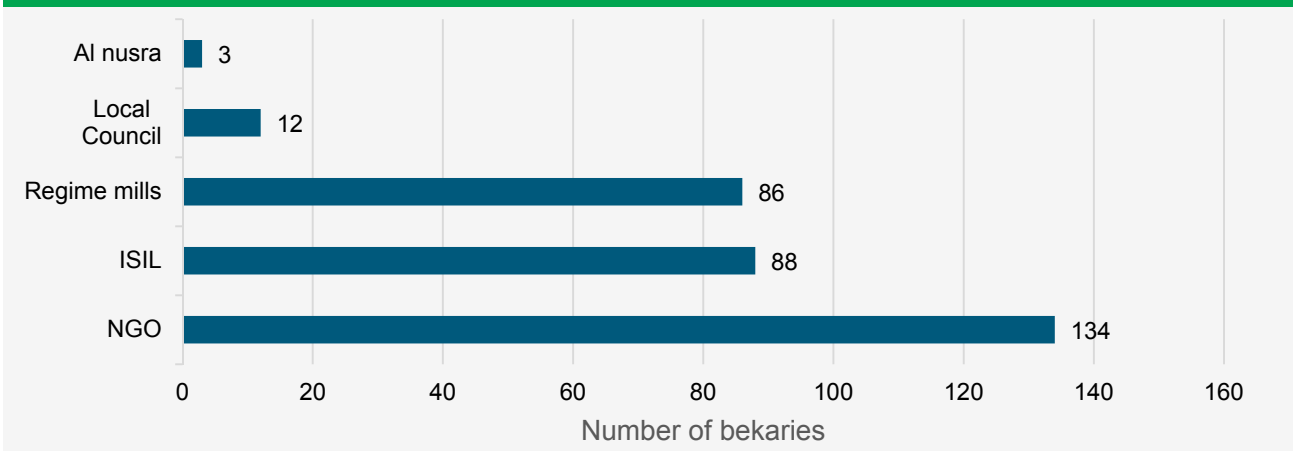
Figure 9: Gaps in the production of assessed functioning bakeries



SOURCES OF FLOUR AND SUPPORT

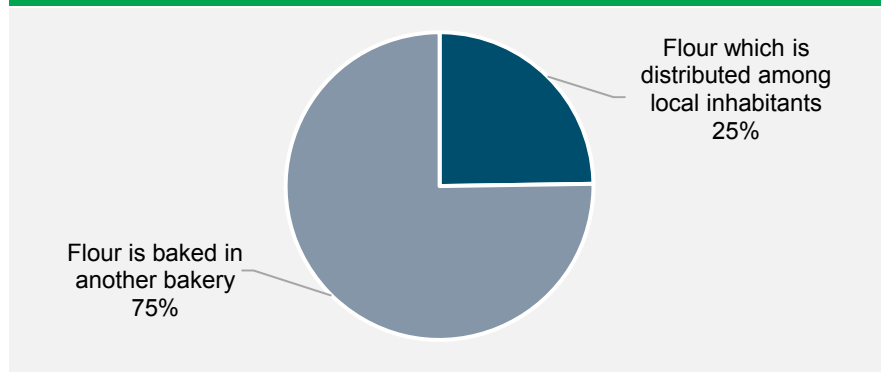
Sources to obtain flour are subject to several considerations, mainly geographical location and distance from the boarder, the military situation on the ground, and the control of different armed groups over some territories. Overall, NGOs were reported as the main source of flour (41%) for assessed bakeries. ISIL was reported as the second main source of flour (28%), as it provided flour to bakeries located in areas under its control.

Figure 10: Flour sources



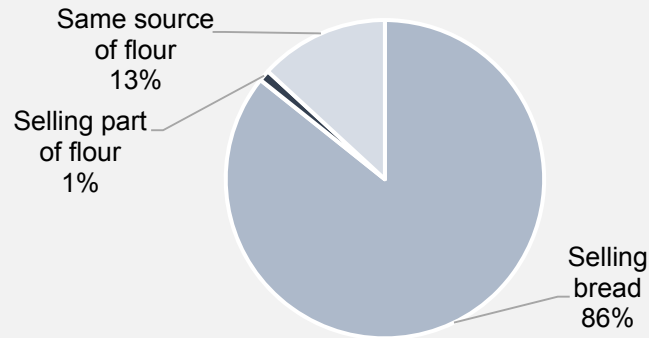
To mitigate shortages of flour and subsequent gaps in bread production, a great majority (75%) of bakeries which are unable to use produce bread reported transferring part of it to other bakeries, while a quarter of non-functioning bakeries (25%) reported distributing their flour to the local population for domestic consumption.

Figure 11: Flour (re)distribution



Operational costs of the majority (86%) of assessed functioning bakeries are covered by selling bread, while the remaining (13%) are reported as receiving support from the same source providing them with flour (e.g. NGOs, regime, local councils, etc.) as indicated above. Only 1% of assessed functioning bakeries are covering their operational costs by selling a portion of their flour.

Figure 12: Means to cover operational costs



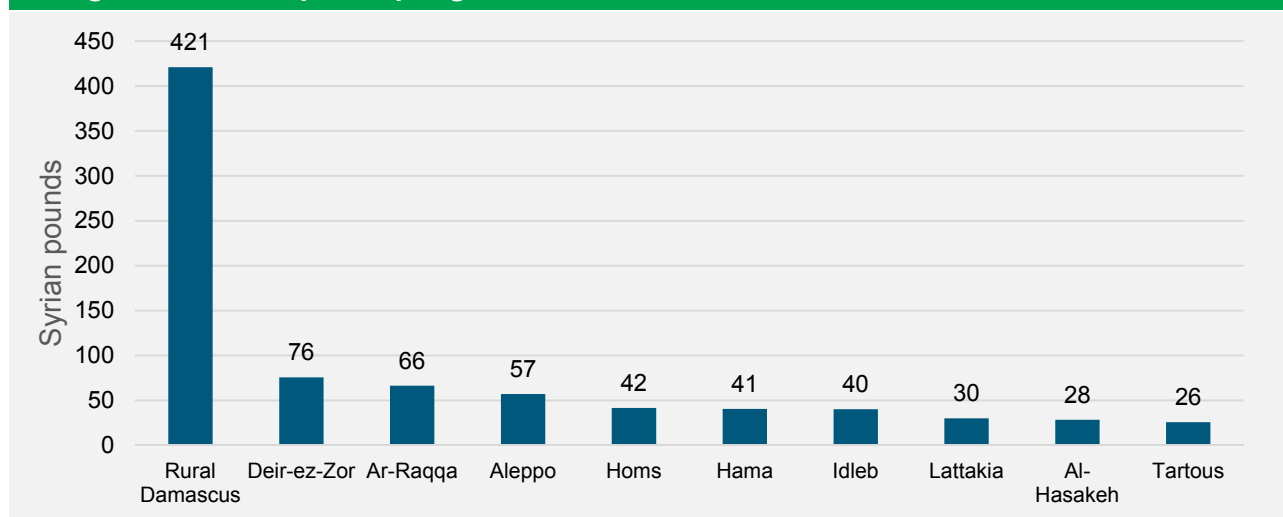
BREAD PRICES

In Syria bread is commonly sold in packages of 8 loaves each. It should be noted that there are 4 assessed private bakeries (3 in Deir-ez-Zor and one in Idleb) which were reported as distributing bread for free. These bakeries are funded by various NGOs, and their monthly bread production capacity was reported at 207 metric tons for an estimated total number of 43,500 beneficiaries.

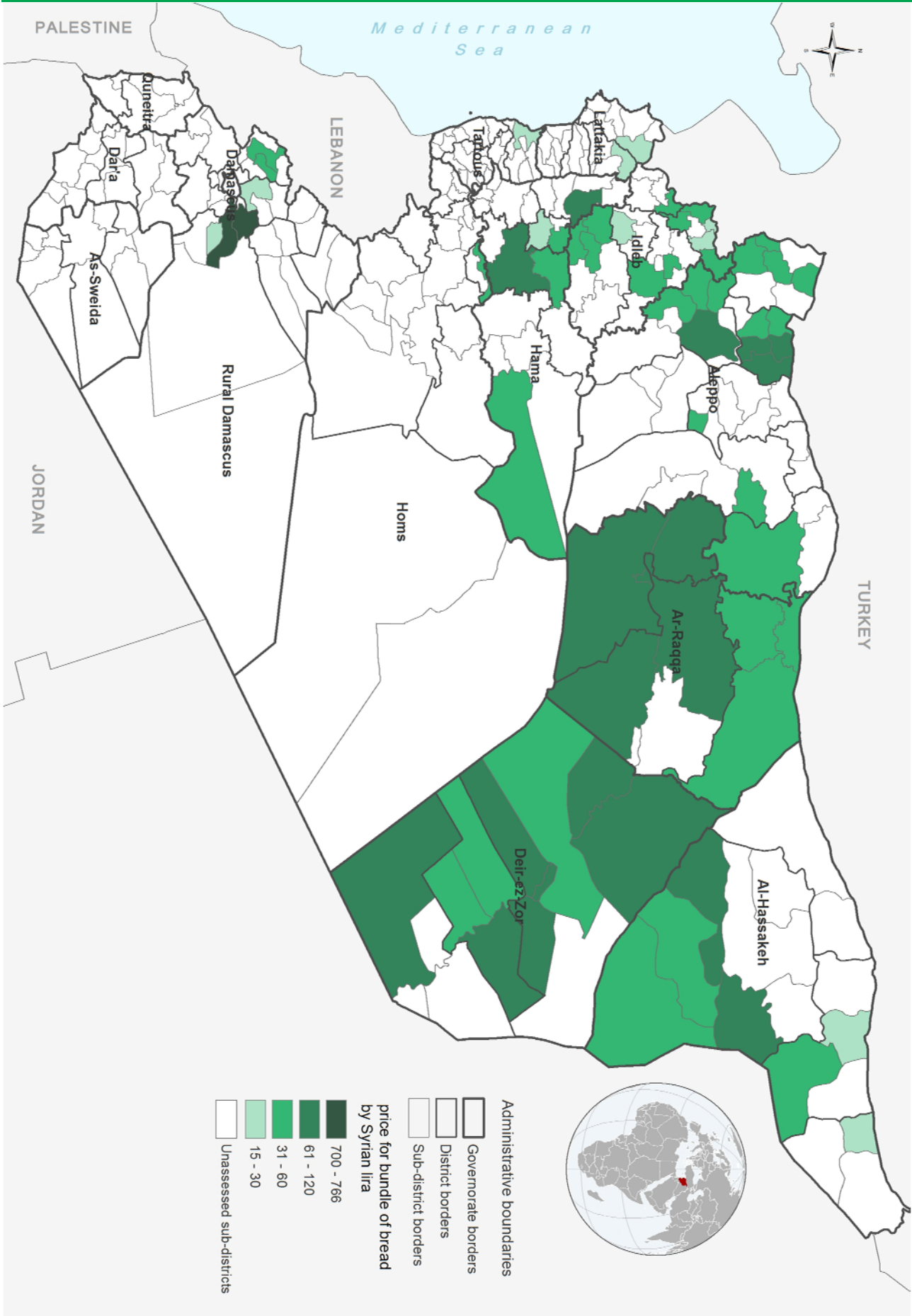
Before the crisis in Syria, flour was subsidized for public, joint and private bakeries which provided bread at low prices. However, during the crisis the price of bread started to vary between areas due to different level of access to flour and other inputs. As shown in the figure 13 below, the highest bread prices (16 times higher than other governorates) 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 latest DYNAMO, there is a notable decrease in bread prices, even in Rural-Damascus Governorate, where the prices had reached 700 SP in some places. As mentioned earlier, this drop in bread prices can be mainly explained by the application of UN resolution (2165) which facilitated access of humanitarian convoys, notably of flour, to several cross border/line areas.

Figure 13: Bread prices per governorate



Map 4: Average bread price at sub-district level



CONCLUSION

The protracted crisis in Syria has a severe impact on the availability and access of food to meet the basic needs of people. An estimated 4.5 million people are in need of food aid. The IMU conducted an assessment of bakeries in Syria in order to inform the food sector response for the people affected by the crisis in Syria. More specifically, the assessment collected information on the type and the status of functioning of bakeries, as well as the number of beneficiaries; the bread production capacity and gaps; sources of flour and support; and the prices of bread.

Continuation of the conflict, aerial bombardment and the siege imposed on some areas of Syria have resulted in an increased number of people in need of food. Further, the intensification of the crisis has resulted in many deaths out of starvation mainly in Rural-Damascus Governorate, where the humanitarian situation has significantly deteriorated. The international humanitarian community has repeatedly advocated for the cease of sieges which are blocking the delivery of life-saving aid.

The two resolutions passed by the United Nations in 2014 have contributed to reducing the impact of the conflict on the populations, notably in Rural-Damascus Governorate where the resolutions have allowed the delivery of assistance, including large quantities of flour, yeast and fuel. This relief aid has helped bakeries increase their bread production, resulting in higher availability of bread for people in need in this area, as well as increased access to bread due to a decrease of bread price, though very limited. Nonetheless, areas under siege may not remain accessible and food insecurity will continue to worsen. Therefore, it is critical for the humanitarian community to continue contingency planning in the event access to these areas is no longer possible, as well as to continue advocating for the increase of humanitarian access and space in Syria.

This assessment covered a large number of private bakeries spread widely throughout Syria. These bakeries are in urgent need of support especially with flour whose lack is considered the main reason for bakeries to stop functioning. Providing bakery owners with cash vouchers to obtain fuel will help to overcome a main obstacle to ensure the continuation of producing bread. In addition, providing bakeries with the main functional raw materials (flour, fuel, and yeast) will contribute to the stability of prices of this main food.

Early November 2014, the IMU presented the preliminary results from this assessment to partners participating in the Food Security and Livelihoods sector working group, who were invited to contribute to refining the analysis of the collected data. This report presenting in more details the final findings from the assessment will be shared widely through the humanitarian community and the assessment data will also be available to operational aid actors upon request. Building on this assessment, the IMU will further support efforts of the Food Security and Livelihoods sector working group in the design and implementation of inter-agency food security sector assessment in Syria.