

Mapping of Wheat-Flour to Bread Processing Facilities



Introduction

To inform the bread support programs in Northwest Syria (NWS), iMMAP in collaboration with the Food Security and Livelihood (FSL) Cluster at the southern Turkey hub, and the Bakeries and Bread Coordination Group (BBCG), conducts a regular mapping and monitoring exercise of the processing facilities in the wheat-flour to bread value chain in NWS. This exercise aims to:

- Assess the capacity and functionality of wheat-flour to bread processing facilities in NWS
- Assess accessibility and affordability of bread in NWS
- Identify existing gaps of bread production in NWS to meet the bread needs of the local population
- Identify the main production barriers and needed support to fill this gap

In June 2021, iMMAP in collaboration with 12 BBCG members conducted the fifth round of the Wheat-flour to bread processing facilities mapping exercise in NWS. Thirty-seven sub-districts were covered between the 11th and 29th of June 2021, across 3 governorates: 18 sub-districts in Idlib governorate, 17 sub-districts in Aleppo governorate, and 2 in Ar-Raqqa governorate. The total number of assessed facilities was 368 facilities at 142 communities. Below are the preliminary findings and recommendations

Key Findings

- **Bread availability in NWS is not meeting the local standard of minimum bread quantity needs:** the individual daily portion of produced bread in NWS was limited to 217g which represents only 66% of the **local standard minimum daily needs of bread (330g) per individual**. The situation in Idlib governorate was the worst across the assessed governorates in NWS where the individual daily portion of bread was limited to 195g (59% of the local minimum daily needs of bread per person), this was followed by Aleppo governorate with 251g (76% of the local minimum daily needs of bread per person), and Ar-Raqqa governorate recorded the highest individual daily portion of bread with 335g (101% of the local minimum daily needs of bread per person).
- **The individual daily quantity of subsidized bread in NWS is 35 percent of the local standard of minimum bread quantity needs:** although bread was reported to be relatively available in NWS, the access and affordability of bread remained a challenge for vulnerable people in NWS, only 53 percent of the total produced bread was subsidized, this means that individual daily portion of subsidized bread was limited to 115g (35% of the local minimum daily needs of bread per person). Similar to the bread availability situation, Idlib governorate recorded the lowest affordability where the individual daily portion of subsidized bread was 75g (23% of the local minimum daily needs of bread per person), followed by Aleppo governorate with 174g as individual daily portion of subsidized bread (53% of the local minimum daily needs of bread per person), and Ar-Raqqa governorate showed fair bread affordability where the quantity of subsidized bread in Ar-Raqqa met the local minimum total population daily needs of bread. The individual daily portion of subsidized bread in Ar-Raqqa governorate was 331g.
- **The quantity of produced bread in NWS decreased by 11 percent in Q2, 2021:** the quantity of total produced bread in NWS recorded an 11% decrease (821 MT/Week) in Q2, 2021 as compared to Q1, 2020 (from 7304 MT/Week to 6483 MT/Week). At governorate level, both Aleppo and Ar-Raqqa governorates recorded a decrease in the production of bread in Q2, 2021 as compared to Q1, 2021; 32% (1296 MT/Week), and 44% (106 MT/week) respectively. However, Idlib governorate recorded a notable increase (19%, 582 MT/Week) in the quantity of bread produced in Q2, 2021 as compared to Q1, 2021.
- **Notable expansion in free-bread distribution programs in NWS:** NGOs in NWS showed a significant increase in the volume of free-bread distribution programs by 149% (from 398 to 838 MT/week), and a stability in the volume of subsidized bread programs in Q2, 2021 as compared to Q1, 2021.
- **Decrease in bread prices and stability in flour price:** in comparison between Q1 to Q2 of 2021, the average reported selling price of 1 kg of subsidized bread in NWS decreased by 28% (from 855 SYP to 616 SYP per kg). Likewise, the average reported selling price of 1 kg of unsubsidized bread in NWS decreased by 22% (from 1594 SYP to 1250 SYP per kg). Locally milled flour and imported flour prices remained stable in NWS between Q1 and Q2 of 2021, with 335 USD for 1 MT of imported flour and 299 USD for 1 MT of locally milled flour.
- **Availability of locally milled flour decreased by 17% in Q2 2021 as compared to Q1, 2021:** 96 bakeries reported low availability of local milled flour which represented 39% of the assessed bakeries. This indicated a remarkable deterioration of the local milled flour availability in Q2, 2021 as compared to Q1, 2021 by 17% (from 22% in Q1 to 39%, 62 to 96 bakeries). Main reasons reported behind this decrease in availability of locally produced flour were reduction in wheat crop area planted due to the high-cost inputs for wheat production and negative coping strategies followed by local farmers; mainly switching from wheat cropping to high value profitable crops, high price of local wheat, closure of trade routes, low number of functional operating mills, and low rainfall levels negatively impacting wheat production.
- **Mills capacity is four times more than the bakeries purchase of local flour:** the maximum reported weekly milling capacity of all operated mills in NWS was 3,704 MT in Q2, 2021, whereas the actual reported weekly milling capacity of all operated mills in NWS was 2,189. This indicated that the actual mills capacity was four times more than the quantity of local flour used by bakeries. Yet, the actual reported mills capacity was limited to 40% of the quantity of used flour (both imported and local) for bakeries.

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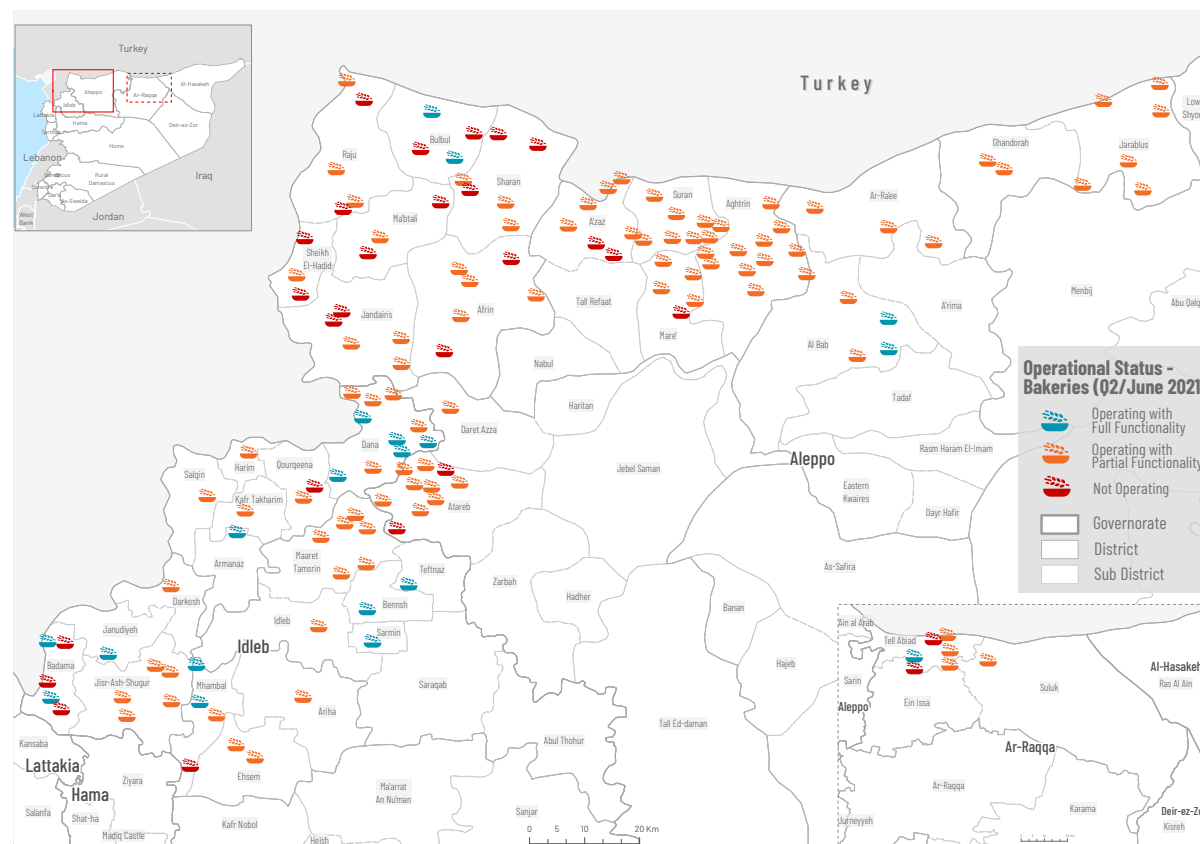


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Recommendations

- **Pay attention to olive harvesting season**, between September and November, it is expected to experience an increase in bread demand at areas that host olive harvesting labourers. Hence, bread production at these areas needs to be expanded to meet the expected bread needs during the olive harvesting season to avoid shortage in bread supply and unexpected increases in the bread's price during that time.
- **Promote business/market linkages and network between wheat farmers and mills** with special focus on Idlib governorate. All assessed operational mills in Idlib reported a sole source of wheat which was the wheat traders. Given the reported production challenges the wheat farmers face and the followed negative coping strategies of switching from wheat to high value profitable crops, promoting these business networks like contract farming between wheat farmers and mills could enhance the wheat farmers' financial and profitable capacity.
- **Calls for advocacy to lobby for the promotion and support of the whole local components of the wheat-flour to bread value chain** – Stakeholders like the FSL Cluster and iMMAP can develop an advocacy research paper as evidence-based information to encourage and enhance the usage of local wheat and flour in bread production and for putting SMART objectives on how home-grown wheat and flour to bread production could be achieved. By combining data from the recent local wheat production assessment and bakery & bread monitoring assessment, an extraordinarily strong evidence-based advocacy paper could articulate in guiding and coordinating NGOs efforts towards increasing the dependency on locally produced wheat-flour instead of imported production inputs for bread in NES.
- **Enhance context-aware aspects of the bakeries rehabilitation programs**; data recorded that some bakeries' representatives preferred local council to conduct the bakeries' rehabilitation given the fact that local council has better understanding of the needs of the local context than NGOs, and the light procedures that LC requires to provide the rehabilitation support as compared with NGOs. Hence, close coordination with Local councils is encouraged for the bakery rehabilitation programs that are led by NGOs, and updating and/or reviewing the Standards Operational Procedures (SOP) of the bakery rehabilitation programs is also recommended.



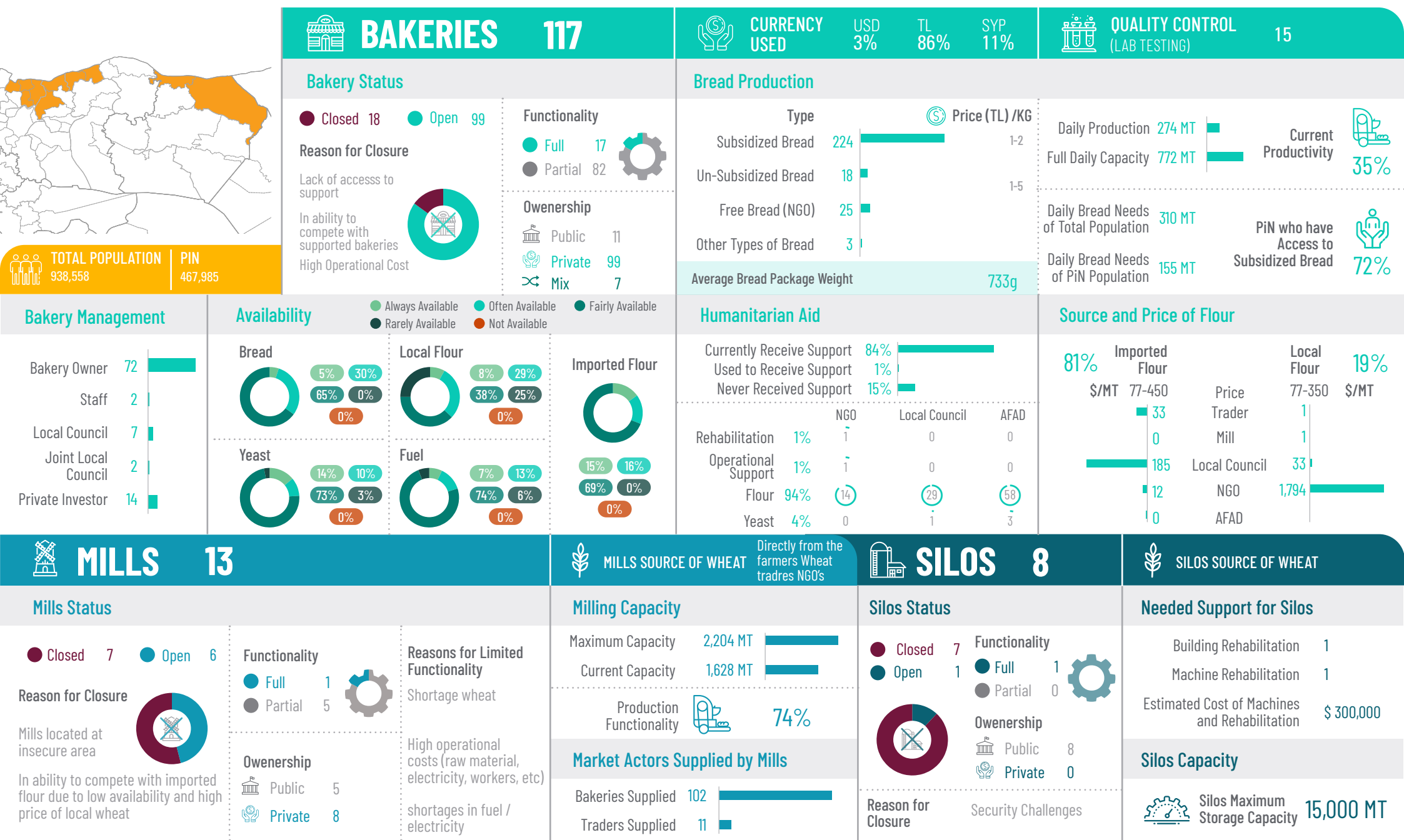
Map 1: Assessed Bakeries in NWS

Mapping of Wheat-Flour to Bread Processing Facilities

Al Bab, Jarablus, Azaz and Tell Abiad June 2021



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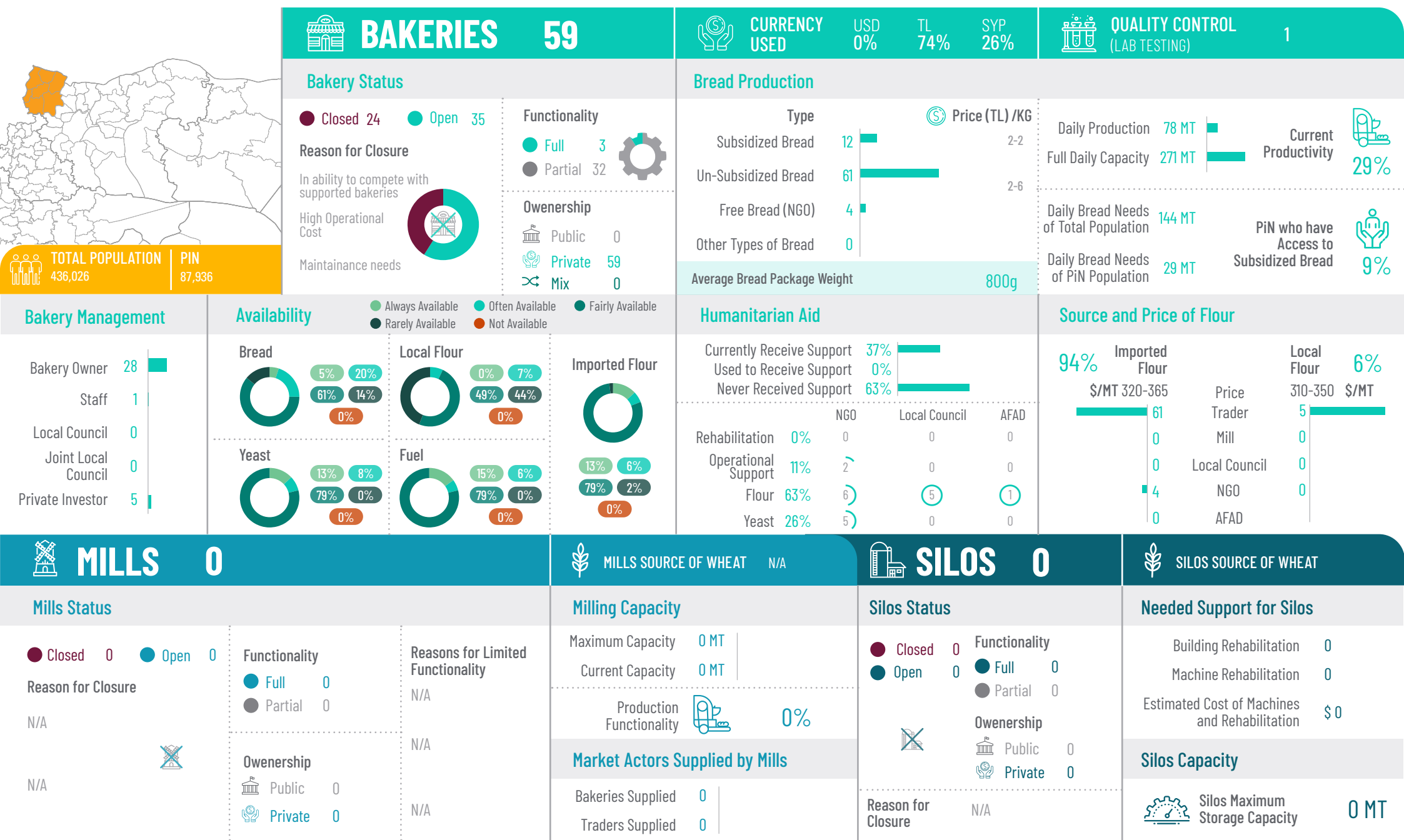


Mapping of Wheat-Flour to Bread Processing Facilities

Afrin June 2021



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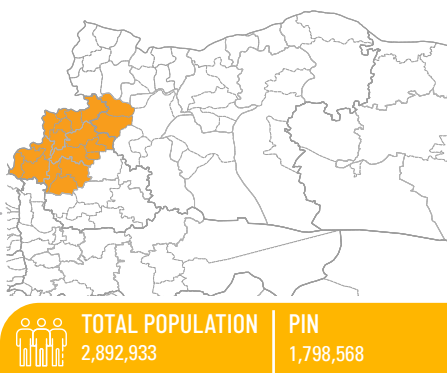


Mapping of Wheat-Flour to Bread Processing Facilities

Idleb and West Aleppo June 2021



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BAKERIES 129

Bakery Status

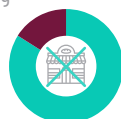
● Closed 21 ● Open 108

Reason for Closure

Bombing and shelling

In ability to compete with supported bakeries

Machine Maintenance's needs



Functionality

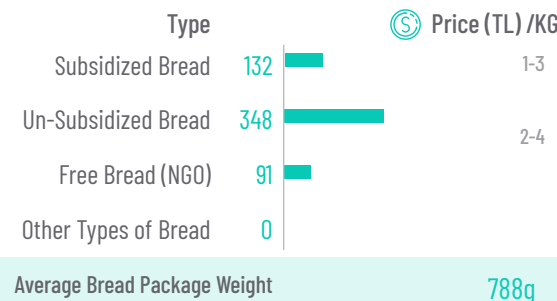
● Full 26 ● Partial 82

Ownership

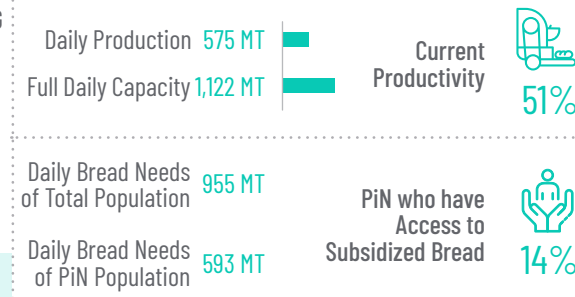
● Public 28 ● Private 103 ● Mix 0

CURRENCY USED

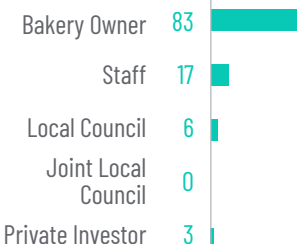
Bread Production



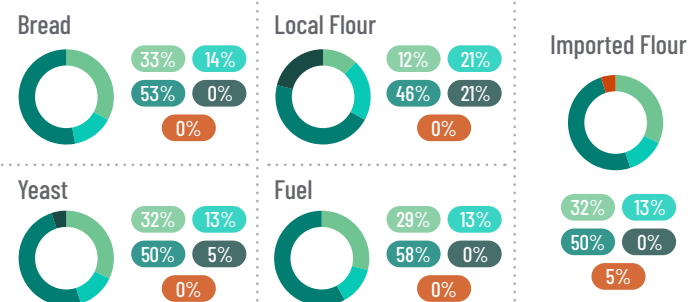
QUALITY CONTROL (LAB TESTING) 95



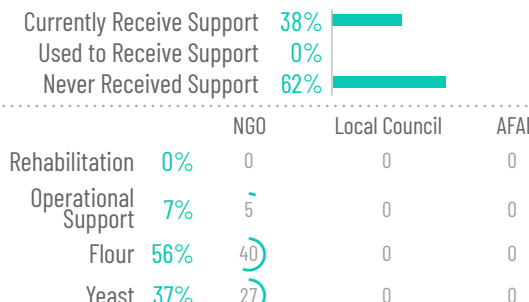
Bakery Management



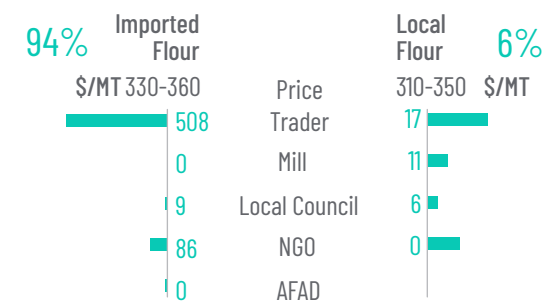
Availability



Humanitarian Aid



Source and Price of Flour



MILLS 6

6

Mills Status

● Closed 2 ● Open 4

Reason for Closure

Difficulties in generate profit.

N/A



Functionality

● Full 1 ● Partial 3

Ownership

● Public 2 ● Private 4

Reasons for Limited Functionality

High increase in the wheat price

High operational costs (raw material, electricity, workers, etc)

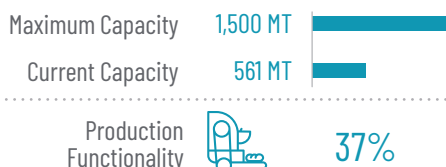
Stopage of fund



MILLS SOURCE OF WHEAT

Wheat trades Directly from the farmers

Milling Capacity



Market Actors Supplied by Mills



SILOS 0

Silos Status

● Closed 0 ● Open 0

● Full 0 ● Partial 0

Ownership

● Public 0 ● Private 0

Reason for Closure N/A



SILOS SOURCE OF WHEAT

Needed Support for Silos

Building Rehabilitation 0

Machine Rehabilitation 0

Estimated Cost of Machines and Rehabilitation \$ 0

Silos Capacity

Silos Maximum Storage Capacity 0 MT

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Sub-District	Total Population	PiN	Weekly Bread Needs of Population in MT	Weekly Bread Needs of PiN in MT	Weekly Subsidized Bread in MT	Weekly Un-Subsidized Bread in MT	Weekly NGO-Free Bread in MT	Total Weekly Produced Bread per sub-district in MT	Production Gap *Availability	% Access to Subsidized or Free Bread of total Pop. *Affordability	% Access to Subsidized or Free Bread of PiN *Affordability	Availability Quantified Needed Support for total pop.	Affordability Quantified Needed Support for total pop.2 Per week in MT	Affordability Quantified Needed Support for PiN
Afrin	185,408	31,172	428	72	16	145	0	161	38%	4%	23%	100	412	56
Bulbul	20,167	6,349	47	15	22	22	0	44	95%	47%	151%	2	24	-7
Jandairis	97,369	10,983	225	25	0	178	30	208	92%	13%	118%	16	195	-5
Ma'bтали	23,150	13,430	53	31	0	14	0	14	26%	0%	0%	10	53	31
Raju	43,503	7,982	100	18	0	34	0	34	34%	0%	0%	22	100	18
Sharan	54,408	11,769	126	27	18	35	0	52	42%	14%	64%	31	108	10
Sheikh El-Hadid	12,021	6,251	28	14	32	4	0	35	126%	113%	218%	-9	-4	-17
Al Bab	184,179	59,302	425	137	451	10	1	461	108%	106%	330%	-39	-26	-315
Ar-Ra'ee	22,309	-	52	0	87	0	0	87	169%	169%	N/A	-60	-35	N/A
Aghtrin	103,199	52,835	238	122	164	1	0	165	69%	69%	135%	51	74	-42
A'zaz	297,497	216,790	687	501	282	77	95	454	66%	55%	75%	154	310	124
Mare'	72,446	12,110	167	28	88	22	0	110	66%	52%	314%	38	80	-60
Suran	95,477	50,839	221	117	72	4	0	76	34%	33%	61%	50	149	45
Ghandorah	34,232	11,297	79	26	98	19	0	117	148%	124%	376%	-57	-19	-72
Jarablus	72,445	34,022	167	79	197	32	79	307	184%	164%	350%	-257	-108	-197
Atareb	156,898	70,825	362	164	60	137	32	230	63%	25%	56%	84	270	71
Daret Azza	63,576	37,700	147	87	54	85	0	139	95%	37%	62%	7	93	33
Suluk	26,965	981	62	2	71	0	0	71	114%	114%	3132%	-10	-9	-69
Tell Abiad	29,809	29,809	69	69	61	2	0	63	91%	88%	88%	6	8	8
Ariha	100,218	20,578	232	48	110	53	0	163	70%	48%	231%	48	122	-62
Ehsem	24,126	2,437	56	6	7	32	0	38	69%	12%	119%	12	49	-1
Mhambal	44,892	9,095	104	21	27	83	0	110	106%	26%	129%	-7	77	-6
Armanaz	75,466	40,752	174	94	48	12	0	60	34%	28%	51%	39	126	46
Dana	1,013,939	869,989	2,342	2010	108	1166	474	1748	75%	25%	29%	443	1760	1428
Harim	66,084	30,243	153	70	0	168	0	168	110%	0%	0%	-17	153	70
Kafr Takharim	35,264	22,922	81	53	110	20	0	130	160%	135%	208%	-77	-29	-57
Qourqeena	103,580	51,792	239	120	0	0	30	30	13%	13%	25%	26	209	90
Salqin	249,901	82,712	577	191	0	132	2	134	23%	0%	1%	103	575	189
Bennsh	43,448	3,737	100	9	0	62	0	62	62%	0%	0%	24	100	9
Idleb	291,445	153,209	673	354	0	214	61	276	41%	9%	17%	163	612	293
Maaret Tamsrin	286,899	265,714	663	614	275	78	0	353	53%	41%	45%	165	388	339
Sarmin	13,546	4,199	31	10	0	41	0	41	131%	0%	0%	-13	31	10
Teftnaz	20,786	11,848	48	27	0	15	0	15	31%	0%	0%	10	48	27
Badama	55,245	33,691	128	78	34	8	34	77	60%	54%	88%	31	59	9
Darkosh	87,315	37,226	202	86	0	4	0	4	2%	0%	0%	4	202	86
Janudiyeh	62,488	29,242	144	68	0	48	0	48	33%	0%	0%	32	144	68
Jisr-Ash-Shugur	97,817	20,657	226	48	92	105	0	197	87%	41%	193%	25	134	-44