



Newsletter

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Dear Reader,

Within its mission to contribute to the ongoing process of agricultural policy development in Syria, the National Agricultural Policy Centre, with the support of the FAO Project GCP/SYR/006/ITA, has been host to significant events during the last six months. The first two of these were; the inauguration of the NAPC's new premises, under the auspices of H. E. Engineer Mohammed Nagi Itri, Syrian Prime Minister. The second was the organization of the Regional Workshop of the Near East and North Africa Network for Agricultural Policies (NENARNAP) on "Agriculture in the Near East and North Africa Towards a Vision for 2050". It was opened by Dr Adel Safar the Minister of Agriculture and Agrarian Reforms, and attended by delegates from sixteen countries of the Region. In addition, two agricultural policy forums were promoted, one on "Assessment of the World Food Security Situation" and the other on "Agricultural Risk Management in a Market Oriented Economy". Furthermore, two training programmes on socio and agro-economic issues including "General Algebraic Modelling" in the context of the "Poverty Assessment" Study, and "Key Institutions in Rural Area" also were delivered by international experts. In addition NAPC staff completed a course on "Interpersonal Skills and Personal Effectiveness. Moreover, a study of "Non-Agricultural Rural Activities" is on-going.

For further information on NAPC Publications visit: www.napcsyr.org.

As the centre is continuously endeavoring to improve the quality of its services and outputs to facilitate its outreach to scholars, researchers, and stakeholders, it has recently launched the latest edition (2006) of the Syrian Agricultural Database (SADB) series in CD-ROM and Online formats, and in both Arabic and English. It provides all available agricultural censuses from official sources over the last 20 years including all types of agricultural products of the Syrian regions. Significantly, all this data is accessible via a user-friendly and fully integrated computer interface, providing its users with instantaneous access to all data available.

Your comments and suggestions are highly appreciated.



H.E Prime Minister and H.E Minister of Agriculture, at the inauguration of new NAPC premises.

Inauguration of the NAPC's New Premises

On the Occasion of the 36th Anniversary of the Correctionist Movement, The NAPC's new premises was inaugurated under the auspices of H. E. Engineer Mohammed Nagi AL Itri, Syrian Prime Minister on Monday 13 November, accompanied by H. E. Dr. Adel Safar, Minister for Agriculture and Agrarian Reform, H. E. Dr. Amer Lutfi the Minister for Economy and Trade, H. E. Nadir Binni, the Minister for Irrigation; in addition to other Ministers and a number of General Directors and Directors from different Ministries and Administrations, as well as representative of several national and international organizations, syndicates, and different agricultural and economic bodies.



Mr AL Itri and his accompanying delegation visited NAPC Divisions, the policy forum hall, training hall, and the library. They got acquainted with the library contents from, books, studies, and research conducted by NAPC and the FAO Project GCP/SYR/006/ITA funded by the Italian government.

H.E. Al Itri expressed his interest in NAPC

activities, and assured the continuous development and promotion of its functions as an institution has a special importance in the ongoing development process in Syria. He focused on the role of NAPC played in the implementation of the state orientations towards development and modernization of the Syrian agricultural sector.

NENARNAP Regional Workshop

Under the auspices of the Ministry of Agriculture and Agrarian Reform of Syria, the NAPC and the FAO jointly organized a Regional Workshop of the Near East and North Africa Network for Agricultural Policies (NENARNAP) on "Agriculture in the Near East and North Africa Towards a Vision for 2050".

The meeting was held on 13 -15 November 2006 at the NAPC premises. In addition to Syria, representatives of 15 countries of the Region attended the workshop.

The workshop was held to initiate some forward thinking among policy analysts to assist in the formulation of a long-term visions for agriculture in the countries of the Near East and North Africa, within the

overall context of the rapidly changing global economic environment, climate change, biofuels and biotechnology emerged as those of major relevance. There are several elements within this shifting setting that will influence medium- and long-term agricultural development prospects in the Region. Policy analysts and policy makers in the Region are encouraged to start assessing the potential impact of these elements in relation to their national current and future agricultural strategies and programmes. On these basis of exchanges carried out during the workshop the participants were unanimous in supporting the proposal of the FAO to conduct a study on the long-term changes impacting on agricultural development and food security in the region. In this respect an annotated outline was prepared for such a study. Within the activities of the NENARNAP General Conference, Syria was nominated as president of the NENARNAP Executive Committee.



Assessment of the world food security situation

with a Near East Perspective

**Professor Hartwig de Haen,
Emeritus FAO Assistant Director
General, FAO Consultant**

12 December 2006

Mr. Hartwig de Haen delivered a seminar and answered questions from the various specialists and ministry representatives who were present at this event on the subject of world food security. NAPC and FAO Syria were particularly honored to host this event for it provided all the attendees with an unparalleled opportunity to receive first-hand information and to engage in direct discussion with such an esteemed specialist in this field. Indeed "The State of Food Insecurity 2006" which provided a backdrop to this presentation and is also internationally recognized to be one of the leading publications concerning food security, is the most recent edition of a series produced by the Economic and Social Department of the FAO which was headed by Mr. de Haen.

In his presentation Mr. de Haen covered the major topics in this field. He provided a clear definition of food security with reference to both the World Food Summit (Rome, 1996) and the Millennium Development Goals of the United Nations. Describing it as the condition existing "when all people, at all times, have physical and economic access to sufficient, safe and nutritious food to meet their dietary needs and



Professor H. De Haen

food preferences for an active and healthy life" (WFS). He added that there are therefore that any food security study had to take account of a range of different factors, namely: accessibility, availability, stability, and quality. With reference to assessing and analyzing different types of food insecurity Mr. de Haen referred to different methodological approaches available, including calorie intake, undernourishment, underweight children.

He also described more generally the less patent problems of hidden hunger (lack of nutrition intake) and over-nourishment.

The presentation, while often using the Near East as a case study, clearly identified the international targets in reducing hunger and discussed the various problems that the realization of such targets can encounter. He also considered the

potential solutions to these problems. Conclusively he clearly pointed to not only the moral obligation but also to the economic benefits of reducing hunger, referring to the 'cost of hunger'. Concluding with a persuasive economic observation, the speaker highlighted that if the WFS target, of halving the number of hungry people by 2015 was achieved then it would be a massive economic bonus for LDCs. He estimated by reaching this WFS target LDCs would reap the benefit of \$120 billion additional GDP/year at the combined cost of merely \$24 billion.

The presentation was followed by an interested debate with questions fielded from a wide range of participants that touched on a generous array of issues; including questions directly related to Syrian food security, the need for international legislation on food security to be mirrored by national legislation, the necessity to encourage rural development projects, the question of the relationship between good governance and hunger, and also an assessment of how accession to the WTO would affect food security.

The seminar proceedings is available at www.napcsyr.org/proceedings.htm



*Agricultural Risk
Management in a market
oriented economy
The challenges for Syrian
Agricultural Policy*

**Professor Carlo Cafiero, FAO
Consultant**

23 January 2007

Addressing the gathered assembly of specialists and policy makers, Mr. Cafiero introduced to the audience the most relevant issues concerning economic risk directly linked to agricultural activity, in order to highlight which challenges the Syrian economy might encounter during the rapidly evolving process of economic and political development that is taking place in the country.

Defining risk as the existence of an objectively measured probability of a bad event occurring the speaker went on to highlight the range of different risks that individuals can be exposed to, and highlighted as the topic of the seminar the discussion of economic risk in agriculture.

The speaker thus sought to highlight the complex role of agriculture in terms of risk in both a market orientated and

a closed market economy, highlighting its potential to both produce many types of risk to various different agents – i.e. the farmer, the consumer and society at large. In discussing the farmer the speaker identified two main types of risk:

- Firstly, changes in climate and other natural conditions that affect yield.
- Secondly, the market risk generated by external supply and demand of agricultural products (production prices decline, inputs prices increase). The more open to trade is a country, the more relevant is this source of risk and encounter transferred natural risk.

Through discussion of theoretical aspects related to the concept of economic risk, and linking them to the conditions of agricultural production in a system of incomplete markets, the expert explored the extent to which possible private risk management instruments can be adopted by farmers to deal with such risk. These instruments included commercial insurance, mutual insurance, and various forms of hedging. As well, he addressed some of the possible policy options that are available to assist farmers in facing their economic risk – such as emergency funds. The discussion following the



Mr. Carlo Cafiero

presentation touched on a wide range of issues, with specific reference to the issues of risk and Syrian agriculture. The questions covered a broad scope. The issues raised included those arising from the experience of Syrian livestock insurance, whose efforts the speaker commended. Further questions were raised with reference to water-related risk in Syria, Dr. Cafiero thus spoke of the need to develop appropriate methods (and technologies) to manage water-related risks. In addition, the issues of the impact of partnership agreements in transition economies with reference to risk, the possible use and potential dangers of subsidies to promote use of market based risk management tools, the potential for hedging price risk on the global financial markets by Syria, and even the risk related to livestock epidemics such as the avian flu, were all dealt with comprehensively by the speaker.

In conclusion the lecturer remarked that perhaps one of the most effective ways to reduce part of the relevant risk in agriculture, is through the provision of technical assistance to farmers and the provision of policy advice by institutions such as the Ministry of Agriculture and Agrarian Reform (MAAR) and NAPC.

The seminar proceedings is available at www.napcsyr.org/proceedings.htm



Cumin in Syria

production & Trade

Cumin is an annual herb of the family Apiaceae (Umbelliferae). The seeds are used primarily as a spice alone or added to chutneys, curries and other foods. It is mainly grown in Iran, India, Syria, Pakistan, and Turkey.

In Syria, Cumin is a very important crop that generates employment opportunities and incomes for both farmers and processors. It is also a significant source of foreign earnings gained from export.

It is grown as a winter crop. Usually, it is planted during the period between mid November and mid December in different Syrian regions. Harvesting starts in May and can run until the end of July depending on the biological maturity of the seed. With reference to harvesting period (supply season), the main competitor to Syrian cumin in international market is Iran, in which harvesting starts in June and ends in August.

Most of the cumin cultivation areas, both irrigated and rainfed, concentrate in Aleppo, Idleb, Hama, Al-Rakka and Homs. These governorates account for over 96% of the total production. The average Syrian cumin seed yield vary from 0.66 to 1.2 ton/ha in irrigated lands and from 0.32 to 0.82 ton/ha in rainfed areas. The high yield variability is due to temperature and rainfall variation among regions.

The volume of Syrian cumin exports has approximately doubled from 13,855 tons in 1999 up to 31,128 tons in 2004. The export growth reflects the increase in cultivated areas, in response to perceived profitability as compared with other alternatives, and includes the accumulated surplus of production from previous years.

In fact, cumin is one of the Syrian agricultural products that showed the most market diversity. It is exported to more than 50 countries. the largest



portion of Syria's shipments was destined to United Arab Emirate, USA, Brazil and Saudi Arabia fetching the country more than SP 1390 million (US\$26.7 million) as average during the period 2001 - 2004.

Like other Syrian agricultural products, the agricultural policies applied for cumin intend to encourage the increase of production and productivity as well as to enhance exports. These policies are accompanied by the implementation of protection strategy for local products by imposing high tariff on imports.

Improvement of Syrian cumin still encounters some challenges. These problems are largely due to inappropriate farming methods used, poor marketing, and the absence of primary processing systems for cumin products which would enable them to qualify to access international markets.

The paper addressed to development of Syrian cumin production, in both quantity and quality, and promotion of its locally processed products to conform to international standards. Given the fact that there are limited competitors for cumin supply in the world market, a good opportunity therefore is available for Syrian cumin and its products to compete strongly in these markets. By that, cumin export could be increased to be a profitable crop generating considerable national income and foreign currency in the country.

The full brief prepared by Mr Basher Hamwi, deputy coordinator of ATD division of the NAPC, is available at www.napcsyr.org/divisions/afd/afd.htm

Other Recent Publications

-Development of Infrastructure in Syria during the Past 25 Years.

February 2007

www.napcsyr.org/division_rdd.htm

-Water Use Efficiency in Syrian Agriculture.

January 2007

www.napcsyr.org/division_rdd.htm

- Barley Outlook

Jan 2007

www.napcsyr.org/division_afd.htm

-Tomato Outlook

Jan 2007

www.napcsyr.org/division_afd.htm

- Agricultural Export Diversification in Syria,

December 2006

www.napcsyr.org/division_tpd.htm

-Intellectual Property Rights (IPR) and Geographical Indicators (GIs).

November 2006

www.napcsyr.org/division_tpd.htm

- Rules of Origin.

November 2006

www.napcsyr.org/division_tpd.htm

-General overview of Common Agricultural Policy (CAP) of the European Union.

November 2006

www.napcsyr.org/division_tpd.htm

-Antidumping: Positions, negotiations, and Relevance for Syria.

October 2006

www.napcsyr.org/division_tpd.htm

Agricultural Commodity Outlook of Poultry

Within the activities related to the supply and demand study of Syrian agricultural products, this outlook is considered as a primary step toward building a comprehensive vision of the Syrian poultry sector including white meat and eggs production.

The poultry outlook addresses the related policies for credit system, fodder supply and distribution, import and export. It presents some insights on the regulations governing the licenses for poultry farms and organization of the poultry breeding sector in general.

The outlook analyses the availability and the efficient use of the production factors, which involve natural resources, labor, capital and infrastructure. In addition,



it discusses the production inputs and the cost factors' share in the production costs; with recognition to their role in increasing or decreasing the total costs. In this regard, the outlook illustrates that the share of fodder cost reaches to 55%, while that of breeding assets is about 20% of the total cost.

The outlook assesses the development and efficiency of the breeding systems and their impacts on the poultry sector production. The annual growth rate for broiler meat and table eggs amounts respectively to 9% and 6% over the period 1995-2004. Moreover, the outlook illustrates the evolution in the number of poultry farms and their distribution among the governorates.

In assessing the state of the Syrian poultry sector, the outlook defined some limitations that hamper the sector's effectiveness. They are related to the decrease of cash loans provided since 2000, and suspension of in-kind loans after 2003. As observed, the private sector plays a key role for fodder provision mainly in import and internal marketing. Whereas the major share of maize and soybeans used in fodder is imported from external sources.

However, tangible improvements have been attained in the productivity of water-unit and of labor force employed in the

sector.

The study also highlighted that layer farms are mainly concentrated in a small number of governorates (Homs and Rural Damascus), while broiler farms are allocated in all of them. Added to this it is estimated that unlicensed broiler farms amount to 36% of the total number, whereas the unlicensed layer farms do not exceed 6%, showing a significant discrepancy. Moreover, the price correlation among governorates is low in broiler products, suggestive of market segmentation, and it is high for eggs suggesting markets integration. These observations point to the need for regulation within the industry.

A significant finding the outlook presents is that there is little or no export for poultry meat, while limited quantities (only 3%) of total table eggs production are exported.

Absence of the availability of data defining the intermediate use of table eggs in food industry, has constrained the marketing trends analysis in this study.

The full outlook prepared by Mr Mouzad Karkout, staff member of AFD division of the NAPC, is available at www.napcsyr.org/divisions/afd/afd.htm

SADB

THE SYRIAN AGRICULTURE DATABASE 2006

The National Agricultural Policy Centre, with the support of FAO, is proud to announce the publication of the Syrian Agricultural Database 2006 in CD-ROM and Online formats, and in both Arabic and English. SADB 2006 is the most recent edition the SADB series, which was first, published in 2003. Published following the format of the FAO Statistical Database (FAOSTAT), SADB 2006 provides detailed and up-to-date data on an extensive range of statistical data related to agriculture. As such the SADB 2006 is a rare resource amongst countries with transition

economies that contributes to the global improvement of agricultural statistics.

Significantly, all this data is accessible via a user-friendly and fully integrated computer interface, providing its users with instantaneous access to all data available. Data Topics include:

- Agricultural Production: specific and disaggregated data on all types of agricultural products.
- National Economic Data: includes data on taxation, customs, and ministry investments.
- Agricultural Inputs: detailed information on fertilizer & pesticide use, vet. medicine, and agricultural machinery.
- Land and Water: statistics on rainfall, regional land use, crop areas, irrigation areas and types.
- Agricultural Trade: vast range of exported and imported products

and their origin and destination,

- Cost and Prices: data includes individual annual/monthly retail and whole prices, major inputs and crop budget.
- Census: provides information on most recent agricultural census.

UPDATED FEATURES include:

- All 2005 data from official sources.
- An expanded number of data sets disaggregated to 'Mantika' (a sub-division of the governorate level) level.

Links:

- Online Publication of the Syrian Agricultural Database 2006 (SADB 2006): <http://www.napcsyr.org/sadb.htm>
- National Agricultural Policy Centre (NAPC): <http://www.napcsyr.org>
- FAO Project GCP/SYR/006/ITA: <http://www.fao.org/world/syria/gcpita/>

Interpersonal Skills and Personal Effectiveness

A workshop was organized by the Center and the FAO on "Interpersonal Skills and Personal Effectiveness" for the NAPC technical staff, which was conducted by the Administrative Staff College of India (ASCI). Two lecturers from (ASCI) namely Dr Ali A Firdausi and Dr S K Ghosh delivered the training from 8 to 12 October 2006, at the NAPC premises.

The training programme included theoretical presentations on management related issues; changing managerial roles, human dimensions of management, team building, time management, managing stress and conflicts, enhancing team effectiveness, and other related issues. The training was complemented with in-class exercises using the method of learning by doing.

Moreover, discussions on identification of issues for action planning took place and presented by the NAPC staff.

The workshop contributed to upgrading the capacities of NAPC staff through better understanding of the communication skills, team work, and interrelationships.

General Algebraic Modeling

Within the activity of the preparatory work for the realization of the Poverty and Migration Study, a course on "General Algebraic Modeling System GAMS" was held at the NAPC. Dr Rachid Dukkali, FAO international consultant, delivered the course during the period from 21 January to 8 February 2007.

Rural Development Division Members and others of the NAPC were acquainted with the GAMS, as a technical tool that used to assess policy impact on poverty. They also practiced building a "Computable General Equilibrium (CGM)" a technical approach that will be implemented in the "Poverty and Migration Trends in Rural Areas" study to be conducted at the Centre.

Key Institutions in Rural Areas

Dr Donato Romano, thematic advisor of the Rural Development Division of the NAPC and FAO Consultant, delivered a course on "Key Institutions in Rural Areas" at the NAPC from 18 to 22 February 2007.

Dr Romano introduced the technical features of agricultural production



and their economic implications and determinants of rural organization in LDCs. He also examined the existence of some organizational "regularities" in the agricultural sector, as well as the conceptual framework of the key institutions (e.g. Credit, Labor, and Land) in rural areas.

The involved participants were the NAPC staff and representatives from other Departments of the Ministry of Agriculture (MAAR) and the General Commission for Agricultural Scientific Research (GCASR).

INTERNATIONAL EXPERTS



Mr D. Abdou, *Chief of the Policy Assistance Branch at the FAO Regional Office for the Near East*



Mr C. Cafiero, *FAO Consultant (Italy)*



Mr V. Cistulli, *Project TSO, FAO, TCAS*



Mr F. de Filippis, *FAO Consultant (Italy)*



Mr H. de Haen, *FAO Consultant (Germany)*



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Mr J. M. Garcia Alvarez Coque, *FAO Consultant (Spain)*



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Mr N. S. Parthasaraty, *FAO Consultant (India)*



Mr D. Romano, *FAO Consultant (Italy)*



Mr J. Vercueil, *FAO Consultant (France)*



Mr O. Bridge, *FAO Consultant (UK)*





The 9th Scientific Committee Meeting

The ninth Scientific Committee (SC) meeting was held at the NAPC' new premises, during December 10 -12, 2006. The SC was composed of two international members, Dr H.de Haen and Mr F. de Filippis, and two national members, Dr M. Yassin and Mr M. Khazma. The Committee reviewed the NAPC Progress Report for 2006 and the NAPC' work plan for 2007. In addition, it discussed the ongoing studies and research being conducted by the Center, as well as evaluating the recent activities and the attained progress .

The 9th Steering Commission Meeting

On 31 January 2007, the NAPC Steering Commission, chaired by H.E. Dr Adel Safar, Minister of Agriculture and Agrarian Reform, and composed of representatives of other ministries and the State Planning Commission, held its ninth meeting at the Ministry of Agriculture and Agrarian Reform. The Commission discussed the NAPC Progress Report for the second half of 2006, as well as it reviewed and approved the NAPC' work plan for 2007. The Commission addressed to benefit from the studies conducted by the Center and to implement the outcomes of these studies. The meeting agreed upon the formation of a Committee headed by H.E. Nabi R Mohammad Deputy Minister of Agriculture and Agrarian Reform, and composed of several directors. The mission of this committee, it was agreed, is to revise the results and recommendations of NAPC studies to be considered and fully applied in the context of the MAAR Workplan.

NAPC Director's Visit to India

The NAPC Director, Mr. Atieh El Hindi, and the Deputy Director, Mr Haitham Al Ashkar both attended a one-week training program on "Strategic Management" conducted by the Administrative College of India (ASCI), in Hyderabad, from 12 to 16 of February 2007.

The ensuing visits, which took place over two full days, were arranged by Mr. N S Parthasarathy, the international institutional support consultant of the NAPC. It included field visits to the Nagarjuna Group, Women's Self Help Group (WSHG), and Hyderabad's new Hi-Tech City.



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