

## Inside this issue

Page 2-3

### The National Workshop on

*"Policies and Institutions to Enhance Fodder and Feed Availability in Syria"*

Page 4

### Working Paper Highlights

*Comparative Advantages of Pistachio*

Page 5

### Working Paper Highlights

*Supply and Demand of Nutrients*

Page 6

### Commodity Brief Highlights

*Citrus World and Syrian Trade and Related Agricultural Policy*

Page 7

### Training in-House

- Training Course on Econometrics
- Handling Data by Using Spss
- Mathematics for Economics Course
- Flash Courses on Survey Design
- Introduction to Time Series Analysis

Page 8

### Flash News

- The 10 th Steering Commission Meeting
- The 11th NAPC Scientific Committee Meeting
- The Last FAO Project Steering Committee Meeting

### NAPC Visitors

*International Experts*

## Dear Reader,

A significant period for the NAPC is coming to close with the termination of FAO Project GCP/SYR/006/ITA "Sustainable Capacity Consolidation of the NAPC", conducted by the Food and Agriculture Organization of the United Nations and funded by the Italian Government, which for 10 years has been working to support the development of the National Agricultural Policy Center. The NAPC would like to convey deep gratitude for the efforts of the Project and the valuable technical and scientific cooperation given to the Center throughout a decade of close collaboration and fruitful supervision.

The Project has been an example of effective international cooperation. It contributed to the Center's establishment and the formation of a qualified technical staff capable of acting in the field of agricultural research and policy analysis, and participated in carrying out research and scientific studies conducted by the Center. As well as the Project supported the NAPC to provide the public with a better understanding of the changes in the agricultural sector in Syria, as well as to formulate key suggestions regarding agro-economic policy options responding to the ongoing process of modernization and development in the country.

Herewith, the NAPC has autonomously started a new stage relying on its grow-up capacity, competency and capability. Within this context, the Center is pursuing the publication of its periodical reports. Recently the Center published the annual Syrian Agricultural Trade report (SAT-2006), which provides a picture of agricultural trade issues in Syria and in the world with relevant indicators and most recent data and information. The 2007 edition of the Syrian Agricultural Database (SADB) series has lately been launched in CD-ROM and online formats. It provides all available agricultural data on the Syrian regions in both Arabic and English. In addition, the Center is regularly publishing several working papers and commodity briefs.

With respect to NAPC cooperation with international research institutions, an agreement has recently been concluded between the Centre and the University of Florence, Italy, Division of Agro-Economy and Regional Resources, targeting scientific and cultural cooperation and exchanges.

Moreover, the Center participated in the organization of the National Workshop on "Policies and Institutions to Enhance Fodder and Feed Availability in Syria", under the patronage of the Minister of Agriculture and Agrarian Reform, and in collaboration with the International Center for Agricultural Research in the Dry Areas (ICARDA) on November 7th, 2007, at the NAPC premises in Damascus.

Lastly, the Center continues to improve the capacities of its staff through several training courses relevant to their responsibilities. Several training programs were delivered in the last period including mathematics, statistical standards, introduction to SPSS and its application, and others.

We welcome your contributions and look forward to your comments and suggestions.

## The National Workshop on “Policies and Institutions to Enhance Fodder and Feed Availability in Syria”

November 7<sup>th</sup> 2007

Under the patronage of the Minister of Agriculture and Agrarian Reform, the National Agricultural Policy Center (NAPC) and the International Center for Agricultural Research in Dry Areas (ICARDA) organized this Workshop at the NAPC premises in Damascus.

The Workshop was opened by welcoming statements of Dr. Nabi R. Mohammad, Deputy Minister of Agriculture and Agrarian Reform, Dr. Ahmad S. Ahmad, Deputy General Director and Director of the Production Systems Diversification and Sustainable Intensification Program in ICARDA, and Mr. Atieh El Hindi, Director of the NAPC.

The workshop was held based on recognition of the vital role played by the agricultural sector, with its two parts (plant and animal production), in the social and economic evolution of Syria. Agriculture contributes to the attainment of food security as well as the development of other sectors. According to the available data, 11% of the total Syrian labor force is working in the animal production sector, and 35% of rural households depend on livestock as a main livelihood source. For this, efforts should be given to further develop the livestock sector, improve its productivity, and living standards of rural households. The Workshop discussed the most relevant issues concerning fodder and feed availability, directly linked to the improvement of animal production and affecting the existence and development of the livestock population in Syria.

The Workshop program included two

sessions: the first one on the role of public establishments acting in livestock production management and fodder production and provision; and the second on the role of non-governmental institutions.

In the framework of the first session, the following subjects were discussed:

- The Role of Agricultural Extension in Expanding Fodder Production



Technology: Dr. Mohammad Abdullah, Director of the Agricultural Extension Department (AED) of the MAAR, briefed the participants on the mission of the Department and informed that two extension programs are devoted to livestock production (sheep and cow) in the country.

- The Project “Enhancing Livelihood State of Small-Scale Farmers and Livestock Breeders through Fodder Use”: The Director of the Project, Dr. Asamoua Larbi, highlighted that it is

funded by the International Fund for Agricultural Development (IFAD) with the partnership of the MAAR, ICARDA, General Commission for Scientific Agricultural Research (GCSAR), and non-governmental agencies. Its scope is to help small-scale farmers and livestock breeders in improving fodder use efficiency to contribute to their living standards optimization, through practicing and testing new

technologies and machinery concerning fodder production, livestock feeding, and marketing. Furthermore, it aims to enhance breeders’ awareness about the best way for cattle fattening and the use of nutritional supplements to increase milk production, in an effort to generate income to serve to improve living standards. The Project was launched in 2007 and is active in four governorates: Aleppo, Homs, Hama, and Al-Hassakeh.

- The Role of Policies and Establishments in Fodder and Feed Availability: Mr. Haitham Al Ashkar, NAPC Deputy Director, focused on the public bodies directly engaged in fodder provision. They are the MAAR, including specialized establishments (General Establishment for Seed Multiplication and General Establishment for Fodder (GEF)), and its Departments of Planning & Statistics, Agricultural Extension, Livestock Health, and Animal Production; The GCSAR; and the Agricultural Cooperative Bank. The other bodies involved are non-governmental organizations (such as General Farmers’ Federation (GFF) and Agricultural Chambers (AC)), and private agencies. He highlighted the Syrian policies for handling and providing fodder concerning production, marketing,



pricing, research, extension, financing, investing and processing.

- Fodder between Planning and Execution: Mr. Hassan Katana, Director of the Planning and Statistics Department of the MAAR, discussed fodder production plans of the MAAR. He stressed that they cannot fulfill the needs of the livestock sector because they are



not compatible with the actual state of agricultural in Syria and the existence of multiple agricultural problems such as land fragmentation, small areas of fodder cultivation, and the shift of farmers production to strategic crops e.g. wheat and cotton. According to the 2007 fodder balance, the GEF provides 12.4% as raw fodder; the private sector provides 16.7% mainly as poultry fodder, while farmers produce the major portion of fodder supply (70.9%) as fodder crops and plant residues. He noted that the local fodder supply would satisfy the demand by the Syrian livestock sector, if used rationally.

- The Role of the General Establishment of Fodder (GEF): The General Director, Dr. Ahmad Al Sheakh, clarified that the key mission of the establishment is to provide a part of the livestock sector's fodder requirements, as raw or processed balanced mixture. It also stores a significant portion of fodder to be distributed to all sectors. Moreover, it secures strategic stocks to cover fodder deficiencies in case of drought and crisis. In addition, it operates to increase the capacity of fodder storehouses and improve open storage conditions. Currently, the establishment produces ready fodder mixture for milk cows totaling to 500 thousand tons per year in Tartous and Adraa plants.

- The Role of the Livestock Production Department: The Director, Mr. Dib Dakouri, addressed the responsibilities of the Department that are developing

and improving livestock productivity and population; identifying the nutritional requirements for each kind of livestock; in addition to defining, classifying, controlling, and analyzing the nutritional value of locally produced fodder on a regular basis. Moreover, it determines specifications of nutritional supplements for the locally produced and imported fodder, and analyzes and monitors

these supplements for safety and quality certification. Moreover, the Department is responsible for granting permission to imports and exports of animals, and fodder, as well as to license the establishment of fodder factories.

- Problems of Fodder Production and Animal Alimentation in Syria: Dr. Yasin Al Masri, Director of Animal Production Research of the GCSAR highlighted that the absence of clear strategies, particularly on fodder production, to develop the livestock sector in Syria constantly generates a significant deficiency in fodder supply parallel to the increased demand. As he assured, the available quantity of fodder might be enough, but it is of poor quality. Consequently, the Syrian livestock sector is subject to undernourishment, which is mainly due to lack of information about

balanced nourishment; ways of preparing, processing, and storing fodder; and the needed ratio of winder and concentrated fodders to be effectively used.

As per the second session devoted to discuss the role of non-governmental institutions, the following was discussed:

- Fodder and the Role of Non-Governmental Bodies: Mr. Omar Al Shalet, Chief of Damascus' Agricultural Chamber, spoke about the contribution of the Federation of Syrian Agricultural Chambers in the agricultural development process. In this regard, the Federation established the "Livestock Services Fund", which is devoted to cow insurance. It provides a combination of integrated services for the participating cow breeders including fiduciary services, production inputs, and agricultural extension services. In addition, it offers training for breeders in relevant fields and helps find marketing channels for milk production. The fund also compensates breeders in case of sudden death of their cows.

- The Agricultural Status in Syria: Mr. Fayez Darwish, Director of the Animal Production Office in GFF, indicated that 70% of the total cultivable land is rain-fed; therefore, Syrian agricultural production varies from year to year depending on annual rainfall rates and distribution. As he indicated the natural grazing land in Syria.

An active debate following each session touched on a wide range of issues aimed at finding effective solutions for feed problems and formulating recommendations fundamental to the development of the livestock sector and fodder supply and related Syrian agricultural policies.

*The proceedings of the workshop are available on the NAPC website at the following link:*

[www.napcsyr.org/events/ws/nat/feed\\_en.htm](http://www.napcsyr.org/events/ws/nat/feed_en.htm)



## Comparative Advantages of Pistachio

The ongoing process of Syrian economy opening towards the world market and scarcity of local natural resources urgently recalls to reallocating domestic resources and tradable inputs within the agricultural sector to increase specialization based on comparative



advantages.

The comparative advantage refers to the most cost-effective compromise between economic efficiency and social benefit of tradable goods. It enables policy makers to consider the efficiency of producing certain agricultural products using domestic resources, against the opportunity to substitute the local production with imports and use the saved domestic resources to produce other agricultural commodities that have potential comparative advantages.

According to the FAO database, Syria ranked fourth globally, after Iran, the USA and Turkey, in terms of pistachio production. In 2005, Syria's production of pistachio was 45 thousand tons accounting for 10% of world production.

The paper addressed that pistachio is considered as one of the most important fruit trees in Syria having the potential to generate both social profit and hard currency. The quality and flavor of the Syrian pistachio encourage its exports to Arab and European countries. Thus, in

order to enlarge the diversity of sources of foreign currency in the country, it is worthwhile to assess the potential comparative advantages of pistachios to enhance its export to the current markets and prospective ones in the Middle East and the EU.

The Policy Analysis Matrix (PAM) approach was used in the study to evaluate the effects of both the government intervention and market distortion on the farming systems of pistachio. PAM is calculated as a partial commodity chain by means of data on revenues and costs at both market and social prices, compared with the existing values (private prices) to assess profits and transfers and to derive the economic indicators of the PAM.

According to the methodology used in the study, trend of world prices, and the available data, the study concluded the following findings for in-shell and shelled pistachios:

- Syria has a comparative advantage in producing in-shell pistachios in the rain-fed system (DRC=0.55) and in the irrigated system (drip DRC=0.53, sprinkler DRC=0.59).

(Note: DRC is the Domestic Resource Cost indicator, If  $DRC < 1$ , the system has comparative advantage, meaning that we use less value of domestic factors (labor, capital...) than the generated value added ( $VA = E - F$ ) at social prices, if  $DRC > 1$  the system has no comparative advantage. Where VA is the generated value added; E and F represent revenues and tradable inputs, respectively.)

- Regarding the strong price competition of the Iranian pistachio, Syria has a weak comparative advantage in producing

shelled pistachios (DRC=0.97).

Responding to the study's main findings, the paper suggests several procedures to improve the comparative advantages of Syrian pistachio in the medium and long term:

- Improving agricultural services in parallel with the agricultural scientific research to improve the local varieties and search for new genetic varieties resistant to alternate bearing phenomenon that also enter earlier into production (since the current ones take up to 15 years) and characterized by higher yields in the rain-fed system, suitable for mechanized peeling. This will reduce the costs of production, and boost the comparative advantages of Syrian pistachio and improve its competitiveness against the Iranian production.

- Supporting the pistachio processors to adopt new technologies for mechanical peeling, which are used in other countries (USA).

- Adopting new technologies for dry peeling' (without water) for green pistachios to protect the pistachio from fungus diseases (Aflatoxin), to be therefore more competitive in the world market.

- The comparative advantages of pistachio should be more effectively exploited by carrying out marketing and farm administration programs according to international market demands, to increase the potential to enter these markets and get good export revenue.

The full working paper prepared by Mr Mahmoud Al Shareef, NAPC researcher, is available at : [www.napcsyr.org/pubs/wp/working\\_papers.htm](http://www.napcsyr.org/pubs/wp/working_papers.htm)



## Supply and Demand of Nutrients

The role of the agricultural sector can be summarized in two main objectives: improvement of agricultural production, and satisfaction of the increased demand on food to ensure food security. The Syrian government therefore gives a lot of attention to these objectives. In fact, the socio-economic plans give priority to pursue food security, for the government to provide people with sufficient, safe and nutritious food.

Within this context, the paper was prepared to broaden the theoretical and methodological base of the research needed to link the determinants of supply and availability of food commodities with their nutrient levels. Given the supply and demand structure for food, it is possible to derive the implied relationship between the overall availability of nutrients and economic factors such as food prices, income, productivity, weather conditions, and others. To trace such relationships, additional research is needed to improve our understanding on how diet affects health and how producers and consumers' behaviors influence food choices.

The nutrient elements are organic and mineral. The basic organic nutrients are calories, protein, fat and carbohydrate. They are needed to produce different levels of calories. The needed value of calories differs according to age, body volume, and kind of activity. According to the FAO indicators, the basic daily requirement of calories is averagely 2700 kilocalories per capita.

The paper classifies foodstuffs into six groups: cereals, legumes, vegetables, fruits, meat and eggs, milk, and vegetable oil and fat. Based on international indices of food composition, the quantity of nutrient elements for each group was estimated in order to assess their surpluses, deficits or balance and their generated energy. In addition, a comparison was made between the evolution of nutrient supply and availability over time, with a description of the time series trends in light of the basic nourishment requirements.

The descriptive statistics used in the paper indicates that domestic supply and availability of calories, protein, fat, and carbohydrates are well above the requirements in the study period (1982-2005). The estimated absolute values of calories ranged between 2318 and 3910 kilocalories per day per capita. That shows the net supply of calories is sometimes under the daily basic requirements.

In order to figure out how food prices and

consumer income affect food options, and hence the availability of nutrients, to consequently improve food quality, and the supply and demand of calories and protein intake levels were estimated using "Superficial Uncorrelated Regression (SUR)". Both price and income elasticities of the two nutrients were assessed to be used in future predictions and policy analysis of food. The study main findings can be concluded as follows:

**Calories supply:** it has an inverse relation with the previous year prices of cereals, legumes and vegetable oils & fats; and a positive relation with other variables of previous year's, such as prices of other commodities (vegetables, fruits, meat, eggs and dairy products). This is due to a direct linkage with product supply, which is affected by price and non-price factors such as production plans and technology (vertical expansion). Moreover, the results indicate that calorie supply originates more from products with high nutritional value such as vegetables, fruits, meat, eggs and dairy products.

**Calories demand:** It has an inverse relation with the prices of cereals, legumes, vegetables, fruits and vegetable oils & fats; and a positive one with other price variables such as of meats, eggs, and milk. Also, it has a positive relation with non-price determinants such as income level and consumption patterns that are major factors of calories demand. Thus, whenever the total food expenditure increases, the calories consumed increase too.

**Protein supply:** It has an inversed relation with the previous year prices of cereals, legumes, and vegetable oils & fats. In addition, the protein supply is positively connected to other independent variables related to previous year prices of vegetables, fruits, meat, eggs, and milk due to the previously mentioned non-priced reasons.

**Protein demand:** It has an inverse relation with the prices of other commodities, and a positive one with both the total per capita food expenditure and time trend. Thus, whenever food expenditure increases the protein intake increases too. Moreover, the results indicate that protein supply and demand intersection is well above the requirement. This affects positively the food security situation, taking into account that the proteins mostly consumed are from vegetarian sources.

A key result of the paper concludes that usually whenever the income allows, consumers switch towards products having a higher value in nutrients, such as meat, dairy products, etc, regardless of their high prices.

The full working paper is available at [www.napcsyr.org/pubs/wp/working\\_papers.htm](http://www.napcsyr.org/pubs/wp/working_papers.htm)



## Citrus World and Syrian Trade and Related Agricultural Policy

This brief discusses the local and world production, consumption, and trade of fresh citrus (oranges, grapefruits, lemons & limes, and others); It also reviews the development of Syrian and global agricultural trade policies particularly of the European Union, during the period 1996-2005.



Citrus farming is important in Syria as a major source of income for about 30 thousand Syrian households. In addition, it is a significant source of foreign currency. Syrian production of citrus is mainly centered in Lattakia, averagely accounting for 78.3%, followed by Tartous at 20.2%, and the rest of the country producing 1.5%.

The total citrus areas increased from 26 thousand hectares in 1996 to 31.8 thousand hectares in 2005. However, the productivity fluctuated between a maximum value of 104 kg/ tree in 1996 and a minimum value of 73 kg/ tree in 2003, and then increased to 82.3 kg/tree in 2005. Accordingly, Syrian production of citrus reached 550 thousand tons in 1997, while it reached its peak in 2004 with 844 thousand tons, and declined in 2005 to 777 thousand tons. Oscillation of local citrus production mainly was attributed to fluctuations in orange production, which

accounted for nearly 72% of total Syrian citrus production.

In 2005 Syrian oranges production accounted for 0.8% of world production ranking Syria the eighteenth producer globally; lemon production totaled 0.7% and grapefruit 6.7% of world production and the country ranked fifth for this last type.

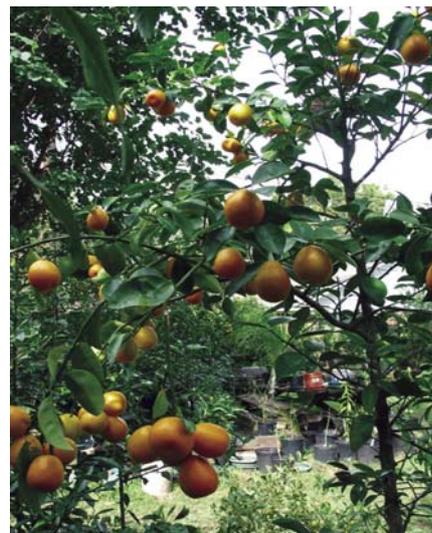
The brief showed that Syrian citrus exports grew significantly in the period, passing from 11.4 thousand tons in 1996 to its peak of 58 thousand tons in 2005. The exported quantity of oranges also increased significantly; since 1996-98, when quantities were below five thousand tons, it grew to reach its peak in 2005 at about 33 thousand tons. The exported quantities of mandarin totaled 18 thousand tons in 2001, and then it decreased during 2002-2004 down to 12.5 thousand tons in 2005.

As for export value, the highest value was recorded in 2001 and 2002 exceeding 1 billion SP, while the biggest exported quantity was in 2005, with a value of 485 million SP. The Arab countries were the only Syrian citrus export destination in recent years 2003-2005 representing 8 markets including Iraq, Jordan, and Saudi Arabia.

The brief noted that the Syrian trade policies positively reflected in increasing citrus exports; such as exemption of agricultural commodities from production tax and abolition of procedures related to compensating imports value by foreign currencies earned from exports. In addition, Syria joining the 'International Transit Agreement' has resulted in reducing the cost of transporting exports of fruits.

The brief also highlighted citrus production obstacles at local level which are mainly represented by the ageing trees, the absence of specialized local export companies, and the lack of compliance of the Syrian citrus sector with the related international standards of grading, sorting, packaging, and product symmetry and homogeneity. These obstacles constrain exports in the world markets that strongly competitive.

Furthermore, several proposals were mentioned calling for paying attention to Syrian citrus quality to attain competitiveness and profitability, taking into account its final destinations whether for export, domestic marketing,



or processing. Also, the brief suggests conducting studies revising potential external markets, especially where Syrian citrus can get higher prices e.g. the European markets, and investigating consumer preferences. It was also suggested to take serious steps in preparation of the entry into force of the Syrian-European Association Agreement, and then to effectively exploit the advantages granted via this agreement. Markedly, the tentative subscription included a good amount for Syrian citrus (45 thousand tons), with an annual increase of 3%, and unlimited



quantity of grapefruit. Thereby, it is the biggest share among other Syrian fruits and vegetables.

*The full brief, prepared by Mr Mouhamad Ali Mouhamad, NAPC researcher, is available at:*

[www.napcsyr.org/divisions/tpd/tpd.htm](http://www.napcsyr.org/divisions/tpd/tpd.htm)

### *Training Course on Econometrics*

The course conducted twice per week, from 20 February to 20 March 2008. Dr. Mitanius Makhoul, Dr. Antranic Tomas, and Dr. Huda Romany, all professors from the Faculty of Economics at Damascus University, jointly lectured in the course.

The presentations focused on statistical research steps, graphical data description, computing descriptive statistics, defining normal distribution and testing hypotheses. In addition, the course included an Introduction to econometrics: specification and estimation of the simple & multiple linear regression model, nonlinear model, heteroskedasticity and multicollinearity consequences.

Several sessions using various computer applications using Excel and SPSS programmes were also conducted.



### *Handling Data by Using Spss*

The course was conducted by Mr. Bashar Nahas from the ICD Division of the Center, from 24 to 28 February 2008, and was attended by NAPC technical staff.

The principal themes of the course were assembling and handling data sets and data analysis by using the SPSS statistical package.

### *Mathematics for Economics Course*

Dr. Martin Ilg from Switzerland lectured the overall course' subjects, which was delivered within more than three months starting from November 2007 for two days weekly, at the Center.

The course aimed at enhancing the knowledge of the NAPC staff on the mathematical tools needed to perform the Center's studies and researches.

Mainly, the course centered on matrix algebra and account, index maximization without determinants and with equal & not equal determinants, in addition to a variety of analysis, with principal equations of differentiation.

### *Flash Courses on Survey Design*

Dr. Chiara Monotti, FAO Consultant from Italy, led five training sessions on Survey Design they were conducted at the Center within January and February 2008.

The courses topics covered Survey implementation, sampling techniques and sample size, and case study exercise: The organic market project in Syria. In addition, she delivered a course on Referencing with a practical guide for Different types of publication.

### *Introduction to Time Series Analysis*

The Central Bureau of Statistics (CBS) in cooperation with the Mediterranean Statistical Project- phase II (MEDSTAT) organized the training course during the period 2- 6 of December 2007, at the NAPC premises.

Dr. Abed-Alhakim Edeh from Al-Kudos University in Palestine and Dr. Muhammad Al-Hage Tirary, from the National School of Statistics and Data Analysis in France both delivered the training course.

The trainees came from Algeria, Egypt, Jordan, Lebanon, Palestine, and Syria particularly from the CBS and the NAPC.

Several subjects were addressed in the course such as introduction to time series analysis, seasonal variations and future prediction account, and mobile medium models. In addition, examples of practices of the participated countries were presented, and SPSS practical applications were conducted too.

### 10th Steering Commission Meeting

On 22 January 2008, the NAPC Steering Commission, chaired by HE Dr Adel Safar Minister of Agriculture and Agrarian Reform, held its tenth meeting at the Ministry of Agriculture and Agrarian Reform premises. The meeting discussed the NAPC Annual Progress Report of 2007, Medium Work Plan (2008-2010), Annual Work Plan of 2008, and Sustainability Monitoring Report.

The Minister stresses the necessity to put into force the outcomes of the NAPC studies whenever possible. He also



assured the intention of the Ministry to support the Center in case of lack of foreign sources. Meanwhile, the Center should seek to find his own sources for self-financing, which could be

obtained through carrying out training activities or by conducting paid studies. just like other institutions of research in developed countries.

In the endeavor to make the NAPC a regional center, the Minister stressed on the need to promote the NAPC activities and capabilities within local ministries and international bodies, through a well planned strategy, to help expanding the range of its cooperators.

### 11th Scientific Committee Meeting

The Scientific Committee (SC) Meeting took place at the NAPC premises from December 16 to 18, 2007. The SC was composed of two international members, Mr. H. De Haen and Mr. F. De Filippis, and two national members, Mr. M. Yassin and Mr. M. Khazma.

The SciCom discussed the NAPC Progress Report for 2007, the Work Plan for 2008, the Mid-Term Work Plan 2008-2010, and the Sustainability Monitoring System for 2007.

### The Last FAO Project Steering Committee meeting

The last Steering Committee Meeting of the FAO Project GCP/SYR/006/ITA was held during March 2008. The meeting that used to be held at NAPC premises, this time was held electronically as the documents presented to the participants were circulated to the SC members electronically via e-mail. The documents comprised the Project Progress Report and Work Plan Revision and were approved by the members of the Steering Committee.

## INTERNATIONAL EXPERTS



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)*



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

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



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



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