Issue 16: January 2026

Syria in Figures

Making Sense of Syria's Economy

Mapping Syria's Uneven Recovery Through Nighttime Light Data

Mapping nighttime light data provides rare insight into Syria's recovery. Analysis shows that many cities are experiencing a surge, while Sweida and Hasakah stand as glaring outliers.

Also in this issue:

External Contribution: Alameen Najjar, Syrian geospatial data scientist and founder of Syria From Above

The Revival of Syria's Oil Pipeline Network

Building on our previous article on Syria's gas pipeline network, oil pipelines form the backbone of the country's petroleum sector. Before 2011, Syria was a net oil producer, with pipelines enabling crude exports through Mediterranean ports. It also served as a transit corridor for Saudi (1950–1990) and Iraqi (1952–2003) oil bound for international markets. This article reviews Syria's domestic and regional oil networks and recent efforts to restore cross-border routes.

Years of armed conflict have inflicted catastrophic damage on this infrastructure and fragmented control over critical networks. More than 1,000 km of oil and gas pipelines in northeastern Syria alone are now estimated to require complete replacement rather than repair. This assessment was echoed by Youssef Qabalawi, CEO of the Syrian Petroleum Company, who stated that the nationwide pipeline network is severely deteriorated, lacks maintenance, and contains chemical deposits and salts.

Syria's domestic oil pipeline system, developed primarily in the late 20th century, connects scattered production fields across the country's eastern and central regions to the Homs and Baniyas refineries and supports exports through the Baniyas and Tartous offshore terminals.

The heavy oil system runs from Tal Adas in the Rumeilan fields to Tartous, stretching about 663 km and designed for a capacity of 300 thousand barrels per day (bpd). The light oil system links Deir Ezzor to Baniyas across a total
network of about 2,000 km, of which 1,185 km were operational before the conflict. Four main gas-turbine pumping stations operate on the light crude system, while nine electrically powered stations serve the heavy crude system. Years of conflict have left much of this infrastructure destroyed.

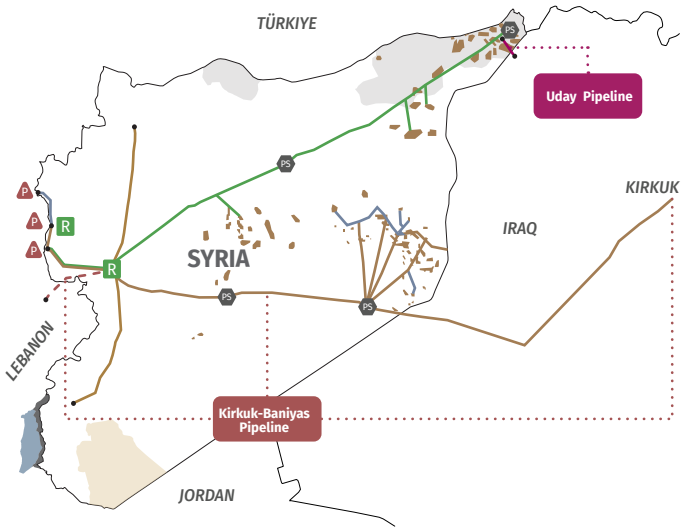
Syria's oil production stood at 387,000 bpd in 2010, of which about 40 percent was exported mainly to Europe. Years of conflict and sanctions eliminated exports, though fragmentation later allowed Kurdish-controlled areas to trade with Iraqi Kurdistan through the "Uday" pipeline.

A previous *Syria in Figures* article on oil supplies in 2025 showed that government-controlled areas now rely almost entirely on imports. This has pushed Damascus to seek more stable and cost-efficient means of supply, including pipelines, where Syria is currently looking for opportunities. Historically, Syria's Mediterranean terminals positioned it as a transit corridor, with two major lines crossing its territory: the Trans-Arabian pipeline (Tapline) and the Kirkuk-Baniyas pipeline, both now dormant or abandoned.

The Kirkuk-Baniyas pipeline, completed in 1952, is Syria's most important transit asset, linking Iraq's Kirkuk fields to the port of Baniyas. The 800 km line, with a capacity of 300,000 bpd, was

suspended in 1956–1957 during the Suez crisis, again from 1982 to 2000 when Syria sided with Iran during the Iran–Iraq War, and finally in 2003 following the US invasion of Iraq and sabotage that rendered it inoperative, leaving it dormant for more than two decades.

Crude Oil Pipeline Network in Syria



- Syrian Interim Government
- Syrian Democratic Forces (SDF)
- Druze Armed Groups
- Golan Heights
- Areas Recently Occupied by Israel
- Refinery
- Port
- Pumping Station
- Heavy Crude Pipeline
- Light Crude Pipeline
- Refined Products Pipeline
- Incomplete Pipeline
- Constructed pipeline (operating, partially operating, not operating)
- Oil Fields
- Oil Utilization Point

Source: Data compiled and assimilated by Karam Shaar Advisory Ltd. based on government sources, unpublished government data, media articles, and other technical reports. Areas of control and influence are drawn based on data from Liveuamap. Areas of control are drawn based on data from Liveuamap as of 25 January 2026.

During this period, efforts to revive the pipeline intermittently resumed. In 2007, Stroytransgaz, a major Russian oil infrastructure firm, opened discussions with Iraqi authorities, though planned repairs were postponed in 2009. Reports later suggested the US was opposing the project to increase economic pressure on Damascus. In 2010, Syrian and Iraqi authorities signed an agreement to build two new Kirkuk-Baniyas pipelines, one for light crude (1.25 million bpd) and one for heavier crude (1.5 million bpd). A year later, both sides met again to discuss restoring the original single line.

The pipeline fell off the agenda during the early years of the conflict. In mid-2019, however, news reported that Iran had revived a proposal

for alternative export routes, either by building a new 1,000 km line through Iraq or rehabilitating the Kirkuk-Baniyas route at Iran's expense. The project, with a planned capacity of 1.25 million bpd, was reportedly destined for the Lebanese coast. Russia later supported the initiative and held meetings in Baghdad to advance it. No action followed until Iraqi Prime Minister Mohamad Shia' al-Sudani visited Damascus in July 2023 to discuss reopening the pipeline. Iraq's government spokesman later confirmed Baghdad's readiness to engage.

The collapse of Syria's regime in December 2024 reignited momentum. Between April and November 2025, senior Iraqi and Syrian officials—including Iraq's National Intelligence Service Director and Syria's Energy Minister—met to address security concerns and pipeline rehabilitation. Talks progressed to the ministerial level, exploring potential extensions to Lebanon. By November, both governments agreed to hire an international consultant to assess the infrastructure and feasibility of reactivation.

Joint technical committees from both countries are conducting engineering studies to determine whether to restore the existing route or construct an alternative. Preliminary estimates suggest reconstruction costs could exceed USD 4.5 billion and take around 36 months. By mid-December 2025, Syria's Deputy Energy Minister Ghiath Diab emphasized that Damascus and Baghdad were advancing plans for a dual pipeline with a capacity of up to 1.5 million bpd, including new pumping stations and a potentially rerouted section in Deir Ezzor.

Syrian Petroleum Company CEO Qabalawi recently stated that the main pipeline requires full reconstruction. Pumping stations were hit by missile strikes, and he described the project as a top priority. Despite the cost, he noted interest from development banks, including in Saudi Arabia, and said Iraq is also keen. Construction could take about two years if work proceeds simultaneously from east and west.

On 17–18 January 2026, government forces regained control of oil resources in northeast Syria from the Syrian Democratic Forces (SDF) under a comprehensive 14-point ceasefire agreement. The deal transferred all oil and gas fields and related infrastructure in Deir Ezzor and Raqqa to Damascus,marking the first time in over a decade that the government controls most of Syria's hydrocarbon assets. For international companies, this consolidation enables coherent permitting, contract enforcement, and revenue collection for cross-border pipeline projects.

For Damascus, the Kirkuk-Baniyas pipeline offers a cost-efficient way to secure crude for domestic refining. Government-held Syria currently consumes about 120,000 bpd but produces only 8,000 bpd. The recently acquired northeastern fields produce roughly 31,700 bpd in Deir Ezzor and about 2,000 bpd in Raqqa, according to field data collected by Karam Shaar Advisory Limited. This leaves Damascus dependent on imports primarily from Russia. Russian crude has been

arriving via sanctioned tankers operating shadow fleets, exposing Syria to secondary sanctions and high transport costs. Iraqi crude via Kirkuk-Baniyas would reduce costs, eliminate sanctions exposure, and—at a potential capacity of 1.5 million bpd—far exceed domestic demand, positioning Syria as a transit corridor to Lebanese and international ports while generating an estimated USD 200 million a year in transit revenue.

For Western policymakers, supporting the pipeline revival has strategic value beyond energy supply. Russia maintains asymmetric leverage over Damascus through its role as the primary oil supplier, its bases at Hmeimim and Tartous, and its potential involvement in printing Syria's new currency. Facilitating Iraqi–Syrian energy integration would reduce Moscow's influence without direct confrontation.

Negotiators, however, must navigate complex obstacles, including the Kurdistan Regional Government's claims over Kirkuk oil. New legal frameworks would be required to address environmental liability, security cost-sharing, international inspection protocols, and dispute resolution mechanisms.

The Syrian Pound: Policy Limits and Market Pressures

In the previous issue of *Syria in Figures*, analysis of the Syrian pound's exchange-rate movements in 2025 showed that sharp swings were driven less by economic fundamentals than by market reactions to political and economic announcements. The currency's broader trend, however, continued to point to gradual depreciation, reflecting a structural shortage of foreign currency.

The existence of two de facto exchange rates, official and black-market, continues to distort economic activity that must use both across different transactions. At its peak on 5 February 2025, the gap between the two exceeded 35 percent, complicating accounting and financial planning, weakening investor confidence, and delaying long-term investment decisions.

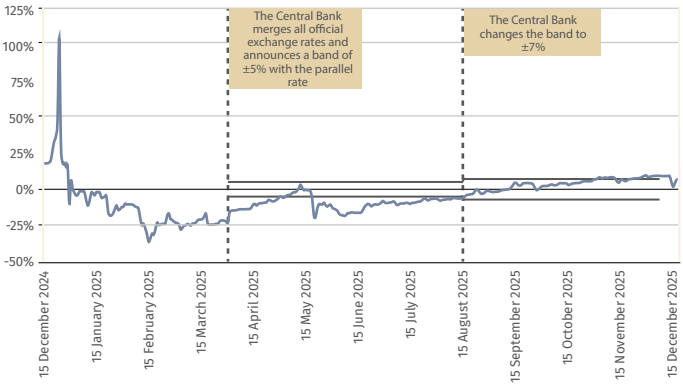
Monetary Policy Actions

Following post-war volatility, the Central Bank of Syria made its first formal attempt to manage the exchange rate. On 23 March 2025, it announced the unification of its exchange-rate bulletins and mandated a ±5 percent pricing band for licensed banks and exchange companies. The aim was to narrow the gap between the official and black-market rates while allowing limited flexibility for formal market participants.

Although the measure appeared technically straightforward, its limits quickly became clear. Between 23 March and 5 August, the black-market rate remained outside the designated band on 120 of 136 trading days, nearly 88 percent of the period, based on our analysis of Syrian pound exchange-rate data.

On 6 August, the band was expanded to ±7 percent, implicitly acknowledging the earlier framework's shortcomings. The exchange rate remained within the new corridor until 27 October, when it first breached the limit. From 27 October to 14 December, the gap again exceeded the ±7 percent threshold on 34 of 54 days. While the wider band initially restrained movements, it ultimately failed to anchor market expectations, eroding the credibility of the Central Bank's framework.

Gap Between the Official and Black Market Rates



Note: A positive gap indicates the black market rate being above the official rate
Source: Karam Shaar Advisory Ltd., Exchange Rate Tracker (exchange rates); Central Bank of Syria (trading margins). Data and calculations by Karam Shaar Advisory Ltd.

Despite the formal unification of exchange-rate bulletins, public petroleum products remain priced closer to the black-market rate, indicating weak coordination across state institutions. In parallel, recent coordination meetings between the Central Bank and UN agencies have produced a new proposal to use a blended conversion rate between the official and black-market rates rather than the official rate alone, further weakening the credibility of the declared framework.

The Central Bank's June 2025 adoption of a managed float highlighted the same disconnect. A managed floating regime requires usable foreign-exchange reserves to allow intervention during periods of volatility.

Syria lacks such reserves, and no open-market operations to buy or sell foreign currency have been announced.

Outlook

In 2025, the Central Bank took three major steps to manage the exchange rate: unifying official rates, imposing pricing bands, and adopting a managed float. In practice, these measures had little effect, raising doubts about their feasibility and credibility. Restoring confidence will require more limited but implementable steps rather than headline policies that exceed the Bank's capacity.

China's Asset-Light Approach in Syria's Transition

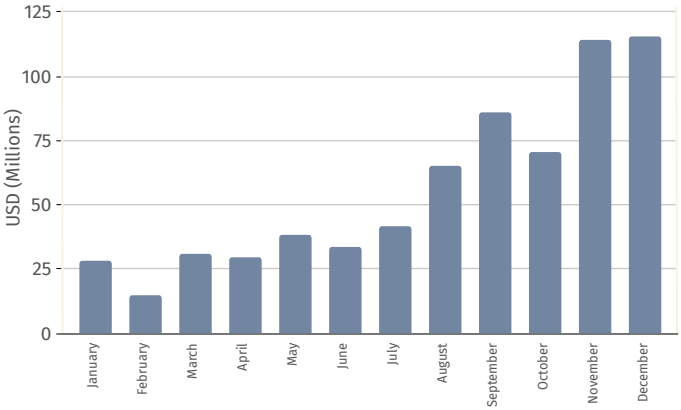
Trade and investment data from 2025 indicate a bifurcated Chinese approach toward Syria. While Beijing remains diplomatically cautious and continues to condition large-scale engagement on security guarantees, private Chinese firms have begun to test the market. Disaggregated customs data show a Q4 2025 surge in commercial inflows, reflecting in part a shift from Turkish land routes to direct maritime shipping. At the same time, private entities have engaged in limited management contracts for industrial zones.

This activity does not amount to a state-led reconstruction effort. Despite more positive rhetoric, Beijing's posture remains constrained by security risks, the Syrian government's aversion to loans, and weak fiscal and market conditions, which together cap the depth of near-term China–Syria economic ties.

Signs of Increased Commercial Presence

China's direct market entry accelerated in the fourth quarter (Q4) of 2025. Data from the General Administration of Customs of China show that total exports to Syria reached USD 668.1 million for the year, driven by a sharp Q4 increase. Monthly exports rose from an average of about USD 30 million in the first half to USD 115.5 million in December. Despite this rebound, bilateral trade remains far below 2010 levels of roughly USD 2.4 billion.

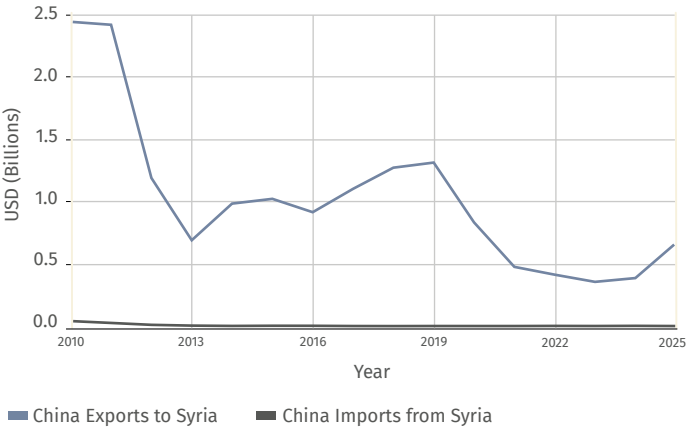
Imports from China in 2025



Source: General Administration of Customs of China (GACC). Data compiled by Karam Shaar

The relationship remains highly asymmetrical. Syrian exports to China totaled only about USD 1.26 million in 2025, less than 0.2 percent of the value of Chinese exports to Syria. This imbalance reflects Syria's long-standing dependence on imported consumer goods, now compounded by a war-ravaged production base and looser trade barriers.

Syrian Trade with China



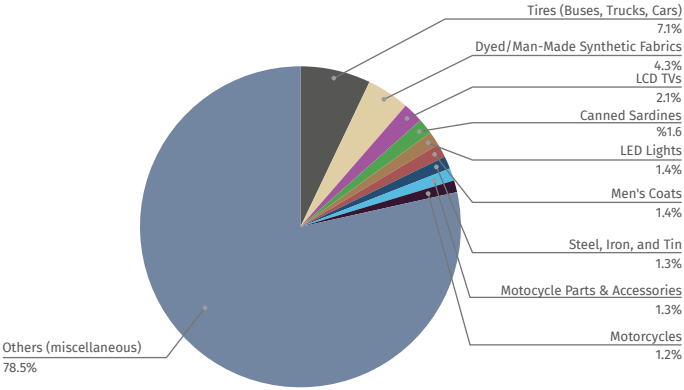
Source: GACC, UN Comtrade. Data compiled by Karam Shaar Advisory Ltd.

Consumer Goods and Spare Parts Dominate

Between January and September 2025, the latest period covered by Chinese customs data, imports were dominated by consumer goods and logistics inputs. By value, the largest categories were rubber tires (~USD 21.1 million), synthetic fabrics (~USD 12.8 million), and LCD TVs (~USD 6.1 million). This pattern points to household and small-business demand rather than reconstruction activity. Some niche imports, such as photovoltaic equipment (~USD 4.1 million), point to a decentralized private response to Syria's energy shortages.

However, the reported October arrival of 16,000 tons of industrial iron does not yet amount to evidence of sustained or large-scale Chinese involvement.

Top Imports from China



Note: Import composition data from source spanned January to September 2025.
Source: General Administration of Customs of China (GACC). Data compiled by Karam Shaar Advisory Ltd.

Asset-Light Investments

In the absence of sovereign lending or Belt and Road Initiative (BRI) infrastructure projects, investment activity in 2025 has been driven more by private firms than by Beijing-backed reconstruction finance. A prime example is the 20-year agreement signed in May 2025 by Fidi Contracting, linked to Chinese tech firm AOJ-Technology, to manage the industrial zones in Hessia and Adra. This reflects an asset-light strategy that prioritizes market entry through management contracts rather than capital-intensive investment.
Official Gazette filings reinforce this pattern. Corporate registrations in 2025, including Xuli ZhongSe LLC (steel) and Zhong Investment LLC (mining and energy), point to growing interest in extractive and industrial sectors. This approach allows Chinese firms to secure positions in strategic nodes without the financial exposure associated with large-scale projects.

At the diplomatic level, the Chinese foreign minister has reportedly welcomed Syria into BRI cooperation, while stressing that Syria must take "effective measures" to prevent terrorist groups from undermining Chinese interests.

Structural Financial and Security Constraints

Although commercial flows rebounded slightly in late 2025, Beijing kept state-directed financial support tightly capped. During the Syrian foreign minister's November 2025 visit to China, Beijing pledged 380 million yuan (~USD 52 million) in aid. The figure signals diplomatic goodwill but remains negligible relative to Syria's multibillion-dollar reconstruction requirements and to pledges from the EU, Türkiye, and Gulf states.

Constraints on deeper Chinese involvement are both economic and political. Syria's weak fiscal standing, obscure sovereign credit rating, and limited ability to guarantee returns often a prerequisite for state-backed Chinese financing—effectively preclude lending. Public statements by Syrian officials that they will not take on external debt or borrow from the IMF or World Bank further explain why Beijing has not supported large-scale construction projects typically funded by loans.

Security considerations reinforce these limits. The continued presence of foreign fighters, including those incorporated into the new Syrian Army's 84th Division, places a firm diplomatic ceiling on Beijing–Damascus relations. In November 2025, China was the only UN Security Council member to abstain from the vote to remove Syria's interim president, Ahmad al-Sharaa, and his interior minister from the terrorist list. Beijing's explanation cited concerns over the fragile security environment and the difficulty of counterterrorism during the political transition.

US–Syria Trade Between Sanctions, Overcompliance, and Tariffs

The repeal of the *Caesar Syria Civilian Protection Act* in late 2025 marked a historic shift in US–Syria relations but did not lead to a recovery in bilateral trade. Although most sanctions and restrictions have been lifted, US–Syria commerce remains constrained by ongoing restrictions, punitive tariffs, financial de-risking, high compliance costs, and other non-tariff barriers.

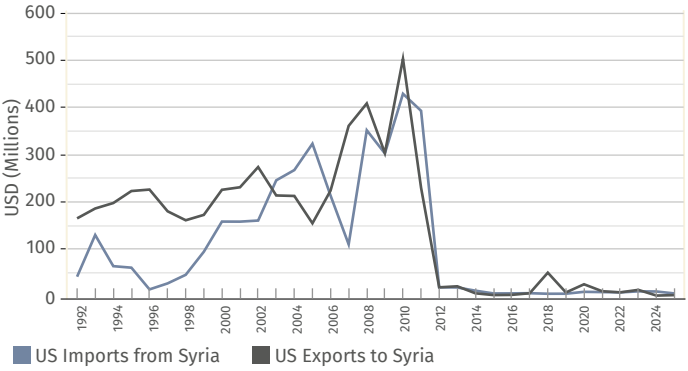
At the core of these barriers are three long-standing sanctions regimes.

First, Syria remains designated as a State Sponsor of Terrorism (SST). This status prevents Syria from receiving Normal Trade Relations, the US legal designation that allows low-tariff trade with a foreign country. When imposed in 1979, the SST designation sharply restricted US foreign assistance and constrained the flow of US goods into Syria, particularly dual-use items.

Second is the *Syria Accountability and Lebanese Sovereignty Restoration Act* (SAA) of 2003. Sanctions under this law prohibited US investments in Syria, barred Syrian aircraft from US airspace, and froze the then-Assad regime's assets. Most importantly for current trade relations, the Act also banned US exports of defense and dual-use items to Syria. Some commercial restrictions were eased on 2 September 2025, allowing limited exports of civilian goods, including consumer communications devices and certain items related to civil aviation, but strict licensing requirements remain in place for most Commerce Control List items.

The third remaining barrier is the *Chemical and Biological Weapons Control and Warfare Elimination Act* of 1991. Although Executive Order (EO) 14312 of June 2025 waived its mandatory application, the statute remains in force and allows the US to reimpose penalties for non-proliferation violations. This continued legal exposure discourages long-term industrial contracts involving dual-use chemical inputs.

Syria Trade with the United States



Source: United States Census Bureau. Data compiled by Karam Shaar Advisory Ltd.

Even where trade is legally authorized, compliance risks remain substantial. Under the Treasury Department's Promoting Accountability for Assad and Regional Stabilization Sanctions program, targeted sanctions continue to apply to Bashar al-Assad and his associates, human rights abusers, captagon traffickers, individuals linked to Syria's past proliferation activities, ISIS and Al-Qaeda affiliates, and Iran and its proxies.

A more systemic challenge stems from EO 13224 of 2001, which maintains the terrorist designation on Hayat Tahrir al-Sham (HTS). The group was founded by Syria's current president Ahmad al-Sharaa and led the campaign that brought down the Assad regime in late 2024. Under the order, the US government is authorized to block the assets of any individual or entity that provides support, services, or assistance to designated terrorist organizations. Although HTS has been formally disbanded, its fighters now form the core of Syria's security apparatus, and many of its former members hold government posts and exercise economic influence. This creates acute contagion risk, where sanctioned individuals embedded within otherwise legitimate state institutions may expose entire organizations to enforcement action when foreign partners cannot reliably separate designated actors from lawful operations.

Furthermore, recently increased tariffs stifle Syrian exports to the US market. Under EO 14257, which modified "reciprocal tariff rates," Syrian goods are subject to a reciprocal tariff of 41 percent in addition to any product-specific duties. By contrast, exporters in neighboring Egypt and Jordan benefit from the 1996 Qualifying Industrial Zones (QIZ) protocol, which provides duty-free access to the US market. Even before shipping, insurance, or financing costs are considered, a Syrian product therefore enters the US market at a price that is at least 41 percent higher than that of an equivalent good from a regional competitor. This disadvantage is further amplified by non-tariff barriers such as high-risk insurance premiums.

Banking Overcompliance Persists

Beyond tariffs, years of sanctions have created a culture of overcompliance and de-risking among global banks and international insurers. Perceived legal and reputational risks, along with the fear of future penalties or regulatory scrutiny, have long outweighed the commercial benefits of engagement with Syria.

This caution is reinforced by the inability of Syrian banks and monetary authorities in Damascus to meet international standards on money laundering and terrorist financing, as reflected in Syria's continued grey-listing by the Financial Action Task Force. As a result, due diligence costs and compliance risks associated with Syria-linked transactions often exceed potential revenue.

Even where transactions are formally authorized, many international banks remain unwilling to process them. The cumulative effect is the continued erosion of Syria's correspondent banking relationships, which either blocks trade entirely or pushes it into informal and less transparent channels.

ongoing banking overcompliance show that the recent repeal of some US sanctions removed only one, though significant, barrier to normalization.

The future of US–Syria economic relations now depends on whether remaining legal, financial, and institutional obstacles can be addressed. That outcome will require sustained engagement and support from state institutions in both countries.

External Contribution: Mapping Syria's Uneven Recovery Through Nighttime Light Data

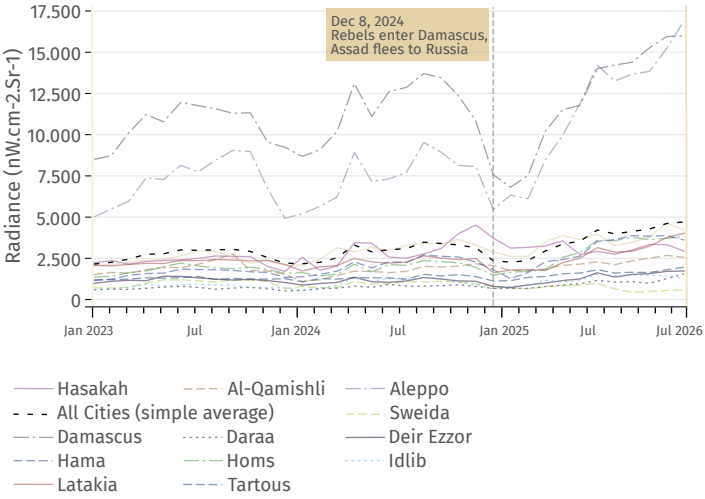
Alameen Najjar, Syrian geospatial data scientist and founder of Syria From Above

The sudden collapse of the Assad regime on 8 December 2024 marked the end of the central phase of a conflict that left Syria deeply depopulated, physically shattered, and economically hollowed out. The year that followed was consequential, with the appointment of Ahmad al-Sharaa as interim president, the formation of a transitional government, and the eruption of deadly sectarian clashes in the west and the south. It culminated in the repeal of the US Caesar Act in late December 2025.

Although there were signs of recovery in 2025—including indicators consistent with economic growth, the return of more than three million Syrians, and improvements in basic services, reliable economic data remain scarce. A comprehensive assessment of recovery therefore remains difficult. To help address this gap, this article uses satellite-derived nighttime lights (NTL) to provide a neutral, data-driven assessment of Syria's recovery one year after Assad.

NTL data primarily capture activity powered by formal, grid-connected electricity—such as public lighting, industry, and large commercial facilities—and do not register most off-grid solar or household-level power use. In areas with high solar adoption, such as in northeastern Syria, NTL may therefore understate local economic activity. The results should be interpreted as a proxy for grid-based recovery rather than a comprehensive measure of economic life. Our analysis finds signs of recovery in most major Syrian cities throughout 2025. However, this recovery is geographically fragmented and politically uneven.

Monthly Nighttime Light (NTL) Levels Across Major Cities in Syria



Source: Data compiled and analyzed by Syria From Above.

Temporal Dynamics of Recovery

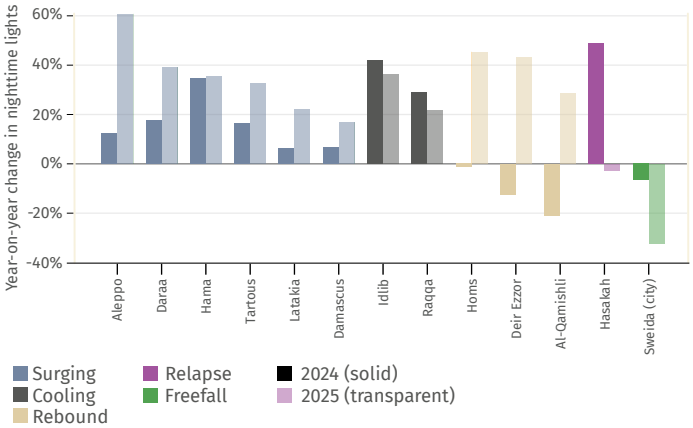
NTL data (see chart above) provide a three-year view of Syria's trajectory. The data show a modest year-on-year increase in 2024, driven primarily by cities outside Assad's control. The regime's collapse marked a turning point that accelerated this trend while shifting its main geographic drivers.

By the time EU sanctions relief took effect in February 2025, Syria had entered a new phase in NTL dynamics. Growth accelerated sharply through May, reaching levels not seen since early 2023. This rise coincided with several developments, including the reported voluntary return of more than 600,000 refugees and targeted US sanctions relief on Syria's Central Bank and ports.

The positive trend was briefly disrupted by a dip in July, which coincided with deadly sectarian clashes in As-Suwayda. The national aggregate recovered in August and continued to rise through November, the last month for which data are available. August also marked the activation of the SOCAR gas deal and the Kilis–Aleppo pipeline, which increased electricity generation and likely contributed to higher NTL levels.

The seasonal pattern of summer highs and winter lows visible in 2023 and 2024 is largely overridden by the steady nationwide increase observed in 2025. This suggests a potential structural recovery rather than a temporary weather-driven effect.

Year-on-Year Nighttime Light (NTL) Change by City (2024–2025)



Source: Data compiled and analyzed by Syria From Above.

Spatial Dynamics of Recovery

All major Syrian cities, with the exception of Sweida and Hasakah, recorded double-digit year-on-year NTL growth in 2025 (see chart above). When the 2024 baseline is included, however, the picture becomes more complex and reveals distinct patterns of momentum and stability.

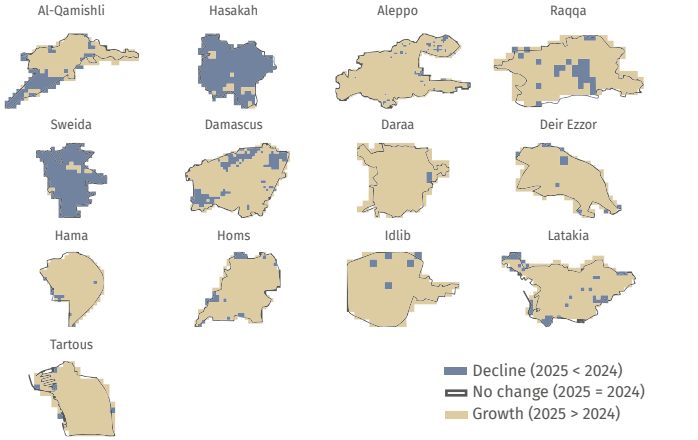
For example, Aleppo did not simply grow by 61 percent in 2025; it also gained momentum following the collapse of the Assad regime. By contrast, Idlib and Raqqa recorded strong double-digit growth in 2025 but lost momentum compared to 2024, suggesting a slowing recovery.

At the other end of the spectrum, Sweida declined by 32 percent in 2025, extending an accelerated contraction that began in 2024. This trajectory was driven by sectarian clashes in July, which damaged power infrastructure through shelling and airstrikes and disrupted access to fuel and repairs through blockades and sabotage.

Together, these trends fall into five distinct NTL growth patterns across Syria's major cities: Surging, Cooling, Rebound, Relapse, and Freefall.

They show that recovery is shaped not only by scale, but also by direction and pace over time.

Spatial Distribution of Nighttime Light (NTL) Change by City (November 2024–2025)



Note: The boundaries of cities correspond to urban areas as seen using satellite imagery and may not correspond to administrative city boundaries.

Source: Data compiled and analyzed by Syria From Above.

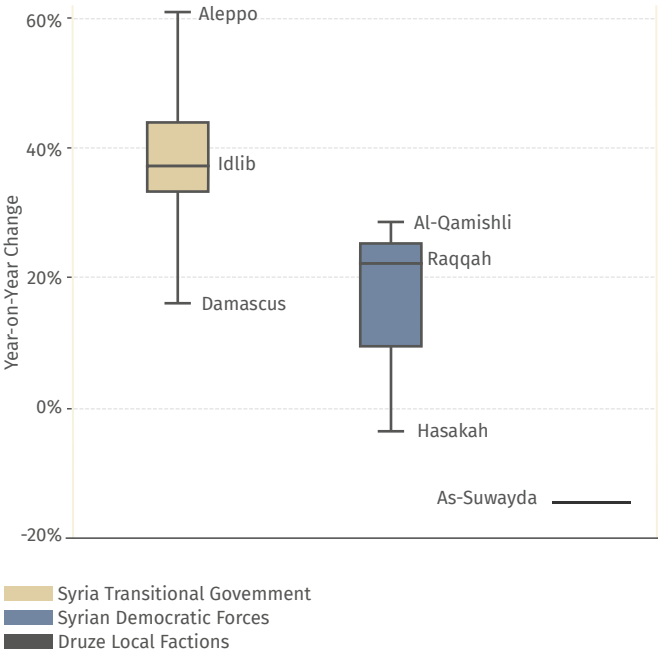
Spatial Distribution of Change

The chart above shows that most Syrian cities in 2025 experienced predominantly positive NTL growth, with only fragmented and localized pockets of decline. This pattern points to a broad increase in grid-based activity and electricity availability across most urban areas.

Al-Qamishli stands out as a partial exception. Although it recovered from a double-digit decline in 2024, large parts of the city still show contraction, indicating an uneven and incomplete recovery.

By contrast, Sweida and Hasakah exhibit widespread decline across nearly their entire urban areas, with only rare and highly localized cells of growth.
This pattern suggests a deteriorating or severely constrained energy profile, with little evidence of sustained recovery.

Nighttime Light Growth by Controlling Actor (2025)



Source: Data compiled and analyzed by Syria From Above.

The Political Determinants of Recovery

Grouping the data by controlling actor reveals a clear advantage for cities under transitional government authority (see chart above). All nine such cities recorded double-digit NTL growth in 2025, ranging from 17 to 61 percent.

By contrast, recovery in the northeast was mixed. Two of the three cities controlled by the Syrian Democratic Forces (SDF) recorded growth of 22 and 28 percent, while Hasakah declined by 3 percent.

The median city under transitional government control recorded 66 percent more growth (36.2 percent) than the median city under SDF control (21.8 percent). This gap is also visible spatially, with more uniform growth across transitional government-held cities and more fragmented patterns elsewhere (see the spatial distribution chart above).

Finally, Sweida—the only major city under the control of local Druze factions—remains an outlier, recording a 32 percent decline. Together, these patterns indicate that political authority structures strongly shaped Syria's recovery in 2025.

Conclusion

One year after the fall of the Assad regime, NTL data suggest that Syria has entered a phase of recovery marked by structural

improvement rather than short-term fluctuation. Yet this recovery remains geographically fragmented and politically uneven.

While satellite data cannot capture welfare, governance, or institutional quality, they offer a neutral lens through which early recovery dynamics can be assessed in the absence of reliable economic statistics. As the repeal of the US Caesar Act begins to translate into material changes on the ground and political arrangements continue to evolve, future shifts in NTL patterns will provide an early signal of whether Syria's recovery consolidates or fractures further along political lines.

SYRIA IN FIGURES

What is Syria in Figures?

Syria in Figures is a monthly publication that provides data-driven and insightful analysis of developments shaping Syria's political economy. It prioritizes relevance and novelty, which makes it a vital resource for policymakers, humanitarian implementers, researchers, and other stakeholders attempting to understand Syria's complex landscape.

Recent publications and contributions:

Syria Sanctions Monitor: Issue 5

Syrian Parliament 2025 Dashboard

Syria Sanctions Monitor: Issue 4

Analytical Brief: Sectoral Implications of UN 1267 Sanctions on HTS

Analytical Brief: US Legislative Developments on Syria

Syria Sanctions Bill Tracker

Syria Sanctions Monitor: Issue 3

Implications and Policy Responses for Banking Sector Sanctions on Syria

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