

Northwest Syria | Joint Market Monitoring Initiative (JMMI)

1-8 December 2024

MARKET OVERVIEW

INTRODUCTION

To facilitate humanitarian cash programming, the **Northwest of Syria Cash Working Group** (NWS CWG), in collaboration with **local and international NGOs**, carries out a monthly Joint Market Monitoring Initiative (JMMI) in Northern Syria. This initiative assesses **the availability and prices of basic commodities** typically sold in markets and consumed by the average Syrian household. These include food, water, and non-food items such as fuel, shelter and clothing.

Among these, 18 components (measured by 24 items) form the **Survival Minimum Expenditure Basket (SMEB)**, which signifies the minimum culturally adjusted **items necessary to sustain a household of 6 individuals for a month**.

Coverage

3	Assessed governorates
10	Assessed districts
32	Assessed sub-districts
75	Assessed communities
2401	Shops surveyed

KEY INDICATORS

Cost of SMEB

4,971 TRY **+4%** ▲
143 USD **+3%** ▲

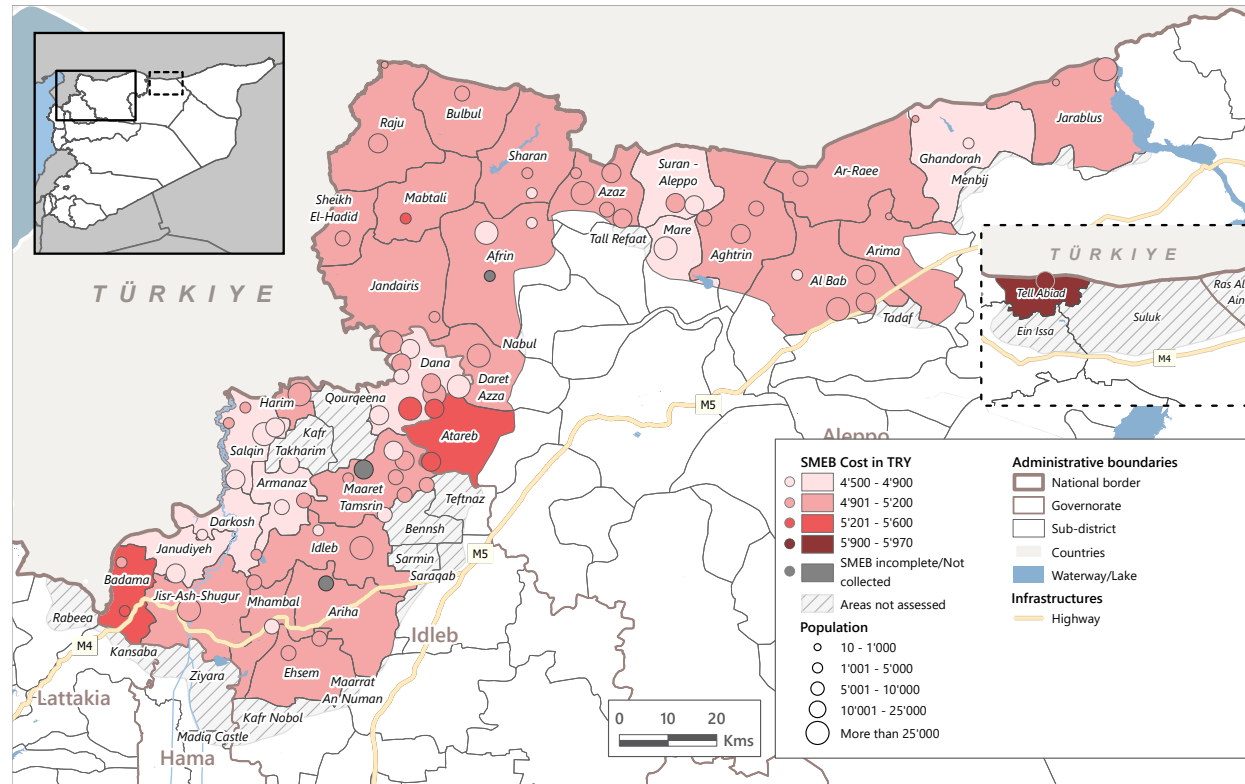
Cost of SMEB Food

3,663TRY **+3%** ▲
105 USD **+0.6%** ▲

USD/TRY

informal exchange rate
35 TRY **+3%** ▲

Cost of the SMEB, Sub-districts in Northwest Syria, TRY



KEY FINDINGS

- The **cost of the SMEB food component increased** across all assessed subdistricts in Greater Idlib compared to only half of assessed subdistricts in Northern Aleppo, likely reflecting the greater impact of recent developments in Syria on these areas at the time of data collection.
- In line with seasonal trends, several monitored **fresh food items experienced substantial prices raises**, with the price of tomatoes, cucumbers, onions, and potatoes increasing by 50%, 53%, 22%, and 50% respectively.
- The **cost of water trucking** in NWS has **skyrocketed 83% over the past year, rising 36%** between October and December alone. This ongoing trend has serious implications for households' ability to meet their basic water needs.
- The number of **vendor KIs** reporting that **security issues** had **negatively impacted** their business in the 7 days before data collection **increased** from 3% in Northern Aleppo and 1% in Greater Idlib in October, **to 14% and 15% in December**.

Survival Minimum Expenditure Basket (SMEB)

The SMEB is a tool designed by the Cash-based responses Technical Working Group (CBR-TWG) for Northern Syria. The [first version of the SMEB](#) was developed in 2014 and formed the basis of the northern Syria joint market monitoring, a partnership between CBR-TWG member NGOs & REACH. The current SMEB is based on the [2017 Revision](#). The SMEB is designed as an indicator of the cost of the minimum, culturally-appropriate items that a family of 6 needs to survive for one month, while meeting basic standards for nutritious food, water use and hygiene in Northern Syria. The cost of the SMEB can be used as a proxy for understanding the financial burdens that households face in different locations.

Exchange rate trends

The Turkish Lira (TRY) continued to depreciate between October and December 2024, although only marginally, with the regional informal exchange rate increasing 1% to 35 TRY/1 USD. The consistent depreciation of the TRY over the past year, which has seen the exchange rate increase 19%, has further fuelled inflationary trends, eroded households' purchasing power, and placed increased pressure on vendors and traders. Rising exchange rates exacerbate economic challenges in conflict-affected areas like Northwest Syria, where currency volatility adds uncertainty and impacts market stability, making planning and budgeting difficult. This instability can deter investment and significantly affect the availability of goods.

The expansion of opposition territorial control over most of the country during the beginning of December 2024 and subsequent movement of people to NWS from formerly GoS areas has also reportedly led to significant confusion in markets about the use of SYP to purchase goods and services. Vendors have widely reported that most businesses are not currently accepting SYP due to the high level of fluctuations in the currency's value.

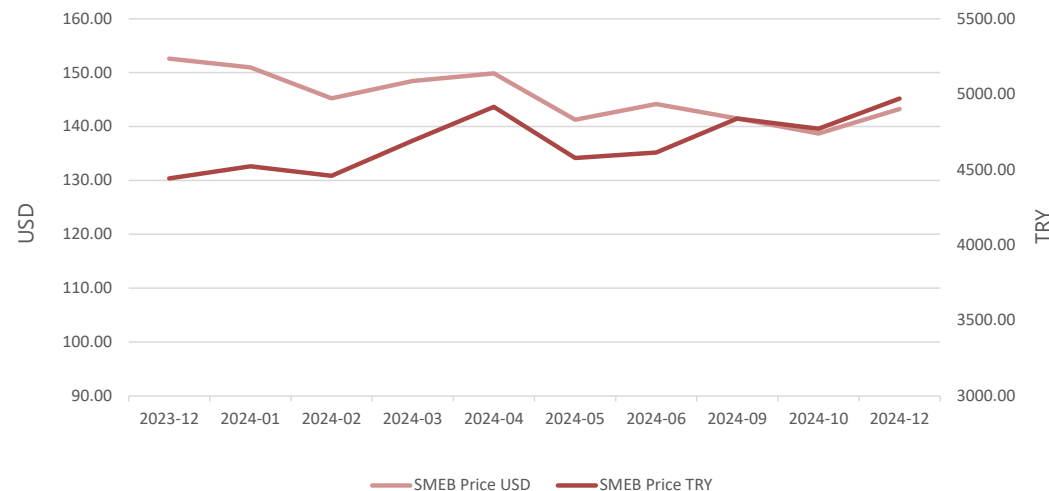
19% ▼

The value of the TRY has depreciated by 19% in the past year.

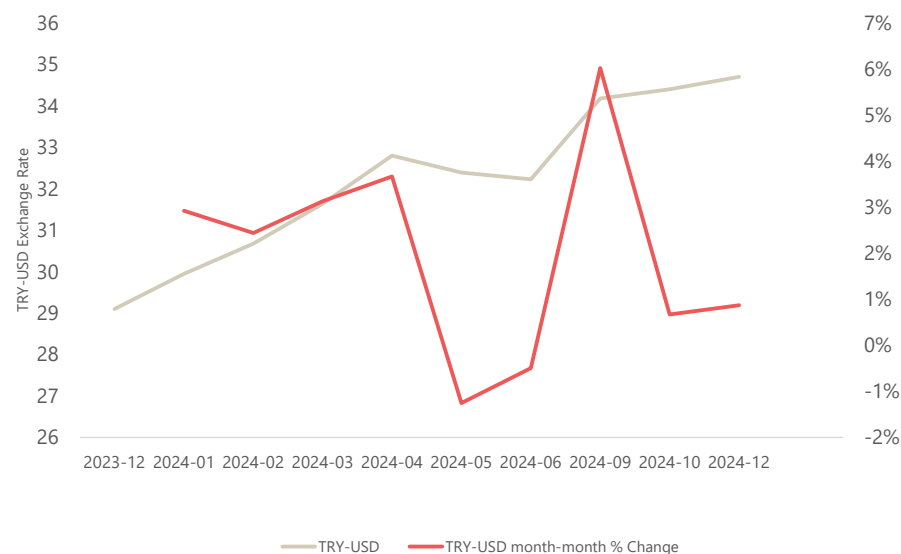
12% ▲

The cost of the SMEB in TRY has increased by 12% in the past year.

Regional median SMEB prices, TRY and USD



Regional median USD/TRY informal exchange rate trends



SMEB Contents

Food

Bread	37 kg
Bulgur	15 kg
Chicken	6 kg
Eggs	6 kg
Ghee (kg) / Vegetable oil (L)	7kg / L
Red Lentils	15 kg
Rice	19 kg
Salt	1 kg
Sugar	5 kg
Tomato paste	6 kg
Vegetables	12 kg

Hygiene (NFI)

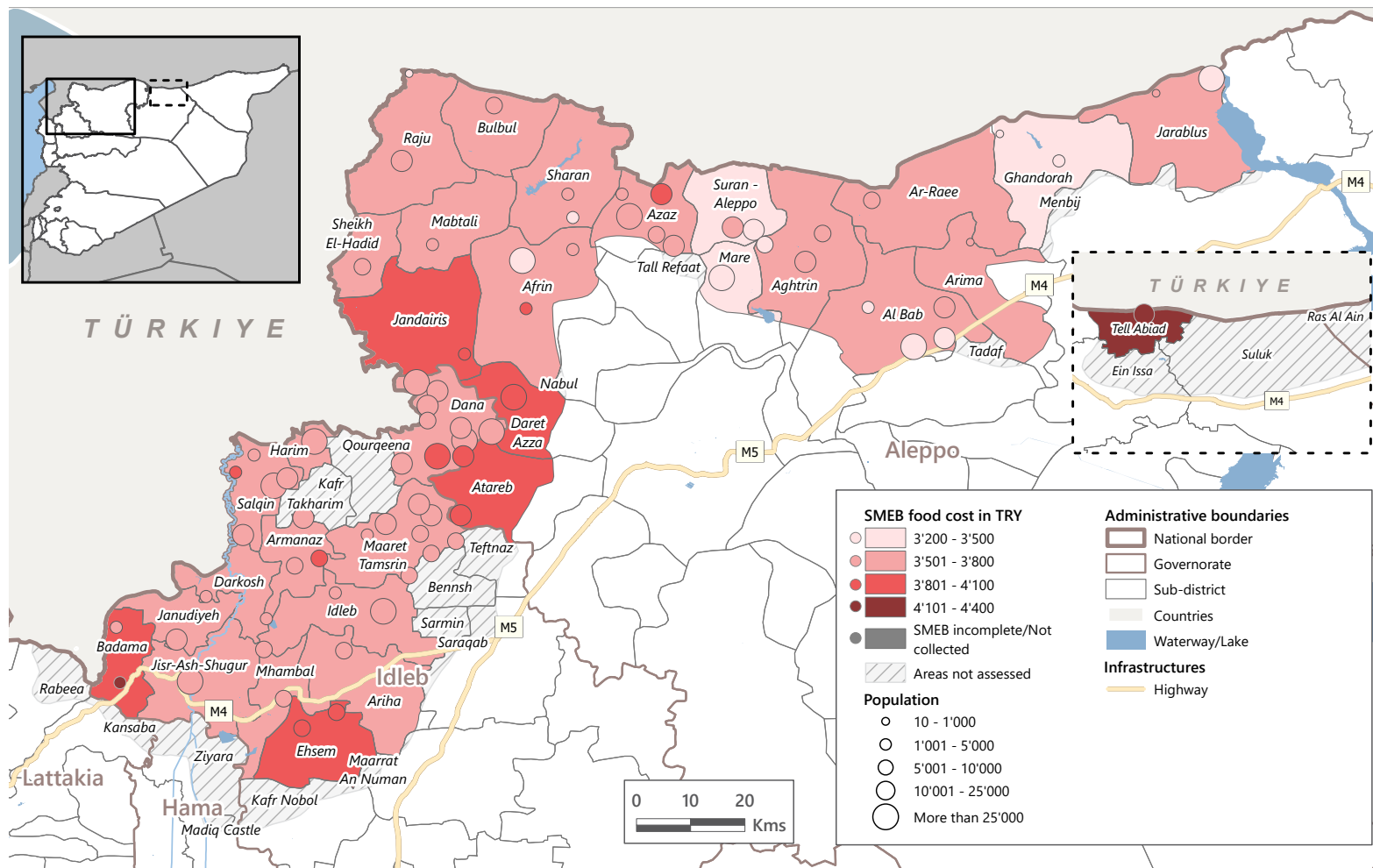
Bathing soap	12 bars
Laundry / dish soap	3 kg
Sanitary pads	4 packs of 10
Toothpaste	200 kg

Other items

Cooking fuel	
Water trucking	15 L
Phone data	4500 L
Float (other costs)	1 GB

SMEB food prices, TRY

Price of SMEB Food, sub-district, TRY



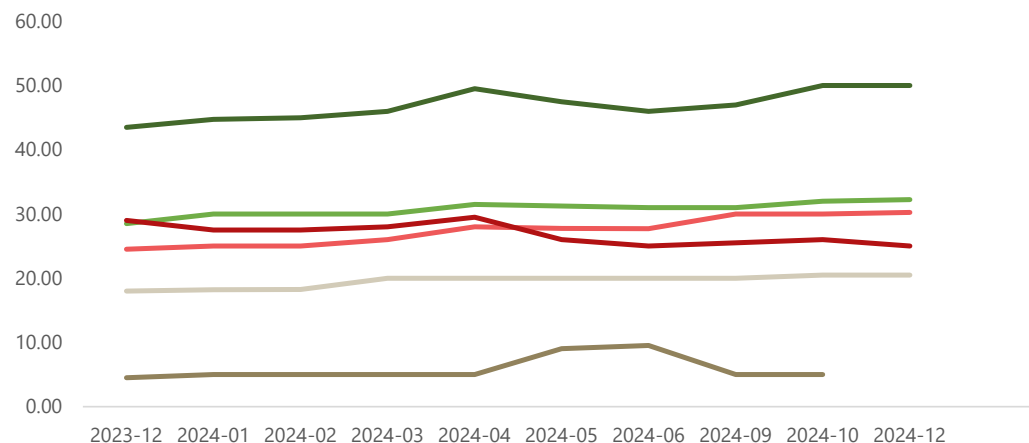
Location	Median Price TRY	Change since October 2024
Aleppo governorate		
Afrin	3,519	-1% ▼
Aghtrin	3,634	+1% ▲
Al Bab	3,501	-0.7% ▼
A'rima	3,511	-0.6% ▼
Ar-Ra'ee	3,551	-8% ▼
Atareb	3,855	+9% ▲
A'zaz	3,633	-4% ▼
Bulbul	3,552	-5% ▼
Daret Azza	3,870	+11% ▲
Ghandorah	3,397	-0.03% ▼
Jandarais	3,802	+3.6% ▲
Jarablus	3,565	+2% ▲
Ma'btali	3,573	+0.08% ▲
Mare'	3,281	-6% ▼
Raju	3,522	-5% ▼
Sharan	3,670	+4.5% ▲
Sheikh El-Hadid	3,720	+7% ▲
Suran	3,435	-5% ▼
Idleb governorate		
Ariha	3,685	+1.4% ▲
Armanaz	3,705	+6% ▲
Badama	3,956	+6% ▲
Dana	3,690	+4% ▲
Darkosh	3,632	+3% ▲
Ehsem	3,834	+8.4% ▲
Harim	3,573	+6% ▲
Idleb	3,652	+3% ▲
Janudiyeh	3,677	+1.3% ▲
Jisr-Ash-Shugur	3,620	+2% ▲
Maaret Tamsrin	3,722	+5.6% ▲
Mhambal	3,656	+2% ▲
Salqin	3,692	+4.4% ▲
Ar-Raqqa governorate		
Tell Abiad	4,279	+9.6% ▲

Food price trends

The SMEB food component regional median increased 3% between October and December 2024. This is in the context of a 14% increase over the past year, largely due to the ongoing depreciation of the TRY. Price increases for monitored food items were recorded in all assessed subdistricts in Greater Idlib, compared to only half of assessed subdistricts in Northern Aleppo. This was likely due to Greater Idlib being more directly affected by the major conflict escalation, both in terms of conflict events and population movements, in early December during the time of data collection. Subdistricts in Greater Idlib that experienced the highest increases included Ehsem (8.4%), Armanaz (6%), and Badama (6%). In Northern Aleppo, while the SMEB food median decreased in half of assessed subdistricts, there were notable increases in Daret Azza (11%) and Atareb (9%). According to REACH field staff these two subdistricts in Northern Aleppo were more impacted by recent events in Syria than others also due to population movements and conflict events during the data collection period.

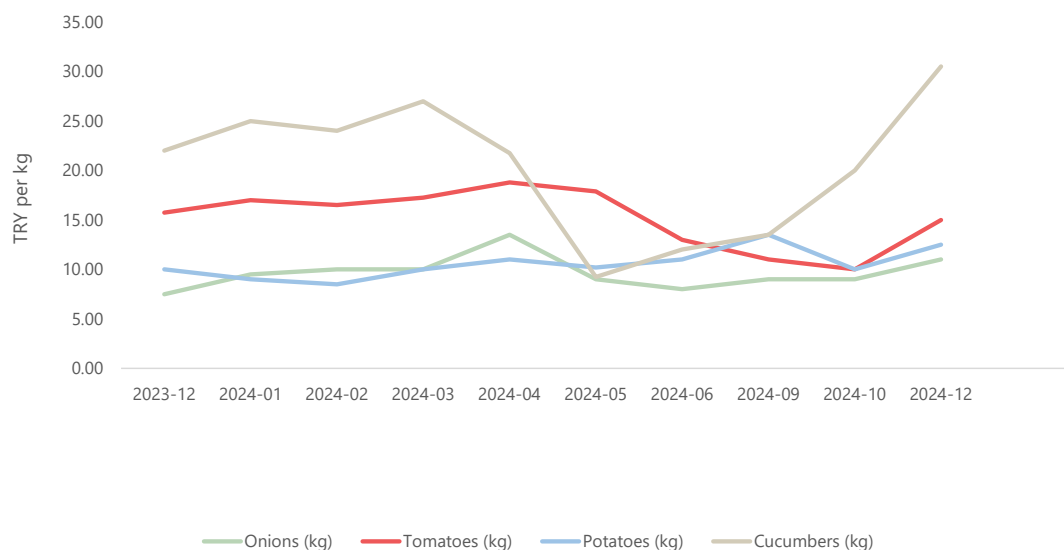
Of all monitored food items, vegetables saw by far the largest price increases, with the price of tomatoes, cucumbers, onions, and potatoes increasing by 50%, 53%, 22%, and 25% respectively. While seasonal dynamics have historically impacted vegetable prices, the extent of these impacts has become more pronounced in recent years.

Regional median price of bulk food items, TRY



— Rice (kg) — Sugar (kg) — Bulgur (kg) — Salt (500g) — Red lentils (kg) — Tomatopaste (kg)

Regional median price of vegetables, TRY



— Onions (kg) — Tomatoes (kg) — Potatoes (kg) — Cucumbers (kg)

Food price changes

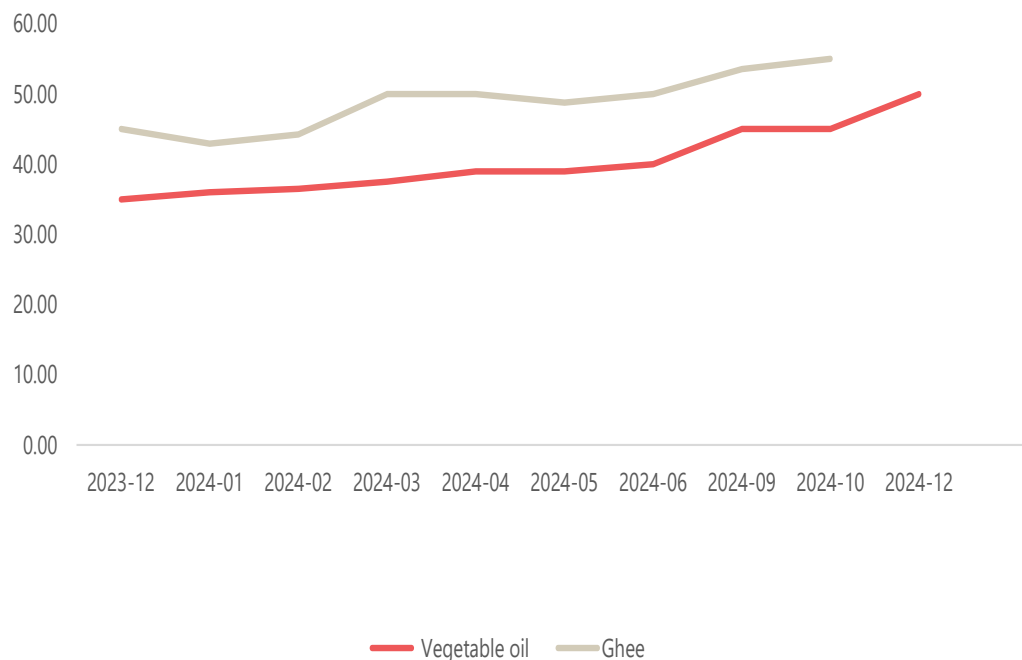
Item	Unit	Median Price TRY	1-month change (TRY) (October)	Median Price USD*
Bulk food items				
Bulgur	1kg	21	0%	0.60
Red lentils	1kg	32.3	+1%▲	0.92
Rice	1kg	30.3	+1%▲	0.87
Flour	1kg	15.5	+3.3%▲	0.44
Salt	500g	5	0%	0.14
Sugar	1kg	25	-4%▼	0.71
Tomato Paste	1kg	50	0%	1.43
Vegetables				
Tomatoes	1kg	15	+50%▲	0.43
Potatoes	1kg	13	+25%▲	0.37
Cucumbers	1kg	31	+53%▲	0.89
Onions	1kg	11	+22%▲	0.31

*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMML.

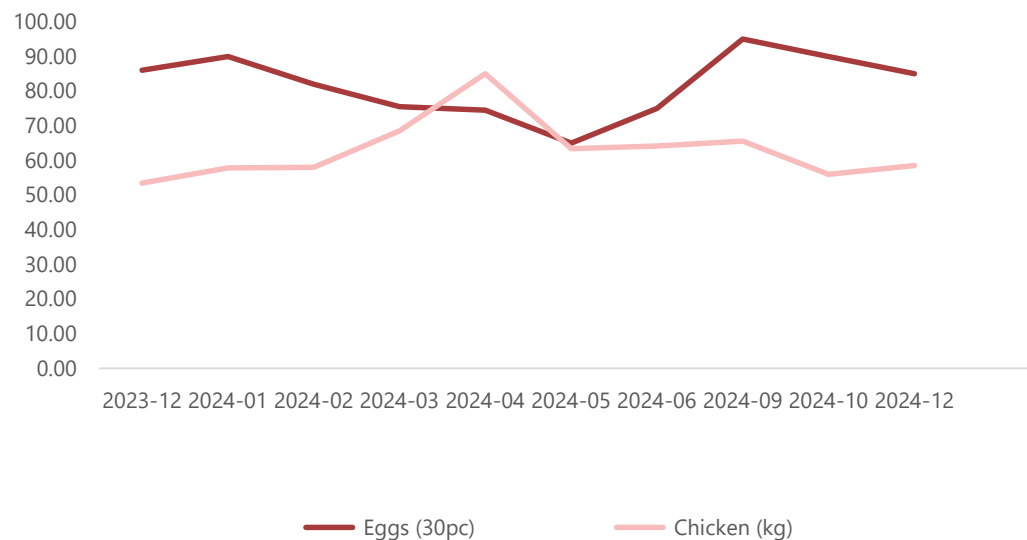
Food availability



Regional median price of vegetable oil, TRY



Regional median price of poultry items, TRY



Food price changes

Item	Unit	Median Price TRY	1-month change (TRY)	Median Price USD*
Cooking oils				
Ghee	1kg	60	+9%▲	1.71
Vegetable oil	1L	50	+11%▲	1.43
Poultry				
Chicken	1kg	59	+4.5%▲	1.69
Eggs	1kg	85	-5.5%▼	2.43
Bread				

*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMMI.

Non food items

In Northwest Syria, water trucking prices continued to rise between October and December 2024. The regional median for the water SMEB component increased by 36%, having risen 83% in the past year. This increase is likely placing households under considerable financial strain and driving the adoption of negative coping strategies. The increased water trucking costs are directly linked to rising fuel costs, which have been an ongoing issue in NWS and Syria more broadly. REACH field staff and vendors also reported widespread challenges with fuel availability in December, particularly diesel, as demand increased due to the evolving conflict and political situation.

Non-food items availability

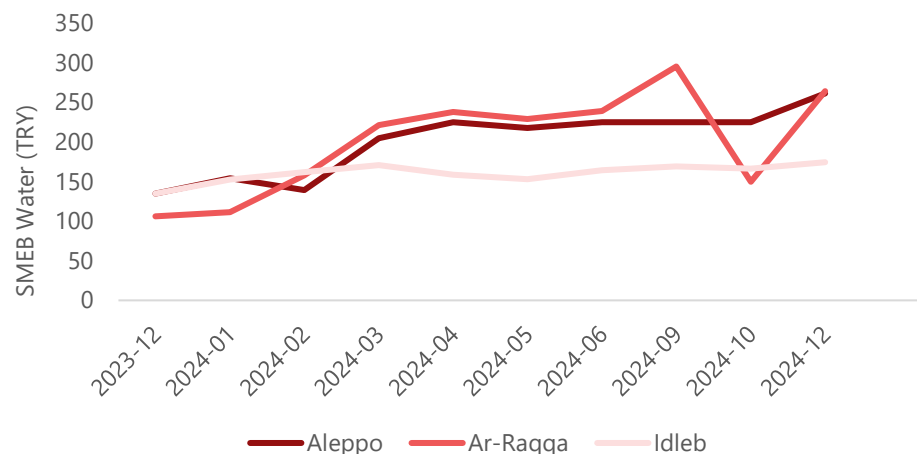
91%

of surveyed vendors reported that petrol subsidized fuel was unavailable in their community or neighborhood.

94%

of surveyed vendors reported that Liquefied petroleum gas (LPG) was unavailable in their community or neighborhood.

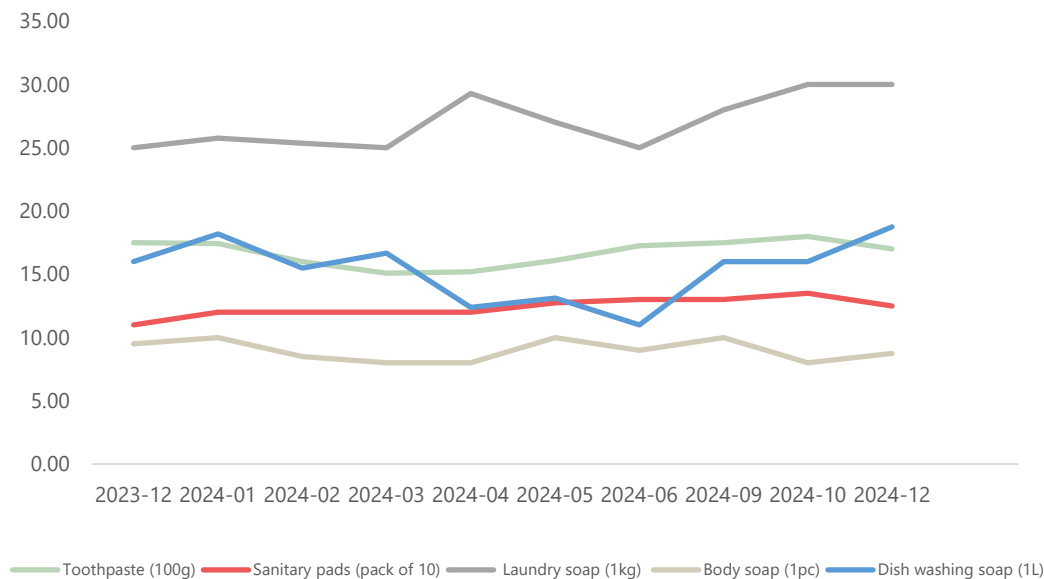
Regional median SMEB water trucking prices, TRY**



Price changes of monitored non-food items

Item	Unit	Median Price TRY	1-month change (TRY)	Median Price USD*
Non-food items				
Bathing soap	1pc	9	+9.4%▲	0.26
Sanitary pads	10pc	13	-7.4%▼	0.37
Toothpaste	100g	17	+5.5%▲	0.49
Laundry powder	1kg	30	0%	0.86
Dish soap	1L	19	+17%▲	0.54
Cooking fuels				
Kerosene	1L	26	-2%▼	0.74
LPG gas	1L	63	+4%▲	1.80
Water trucking				
Water trucking	1L	0.06	+50%▲	0.0017
Internet				
Mobile data	1gb	38	+1%▲	1.09
Transportation fuels				
Imported diesel	1L	36	+3%▲	1.03
Imported petrol	1L	45	+1%▲	1.29
Manually refined diesel	1L	20	-15%▼	0.57
Manually refined petrol	1L	33	+19%▲	0.94

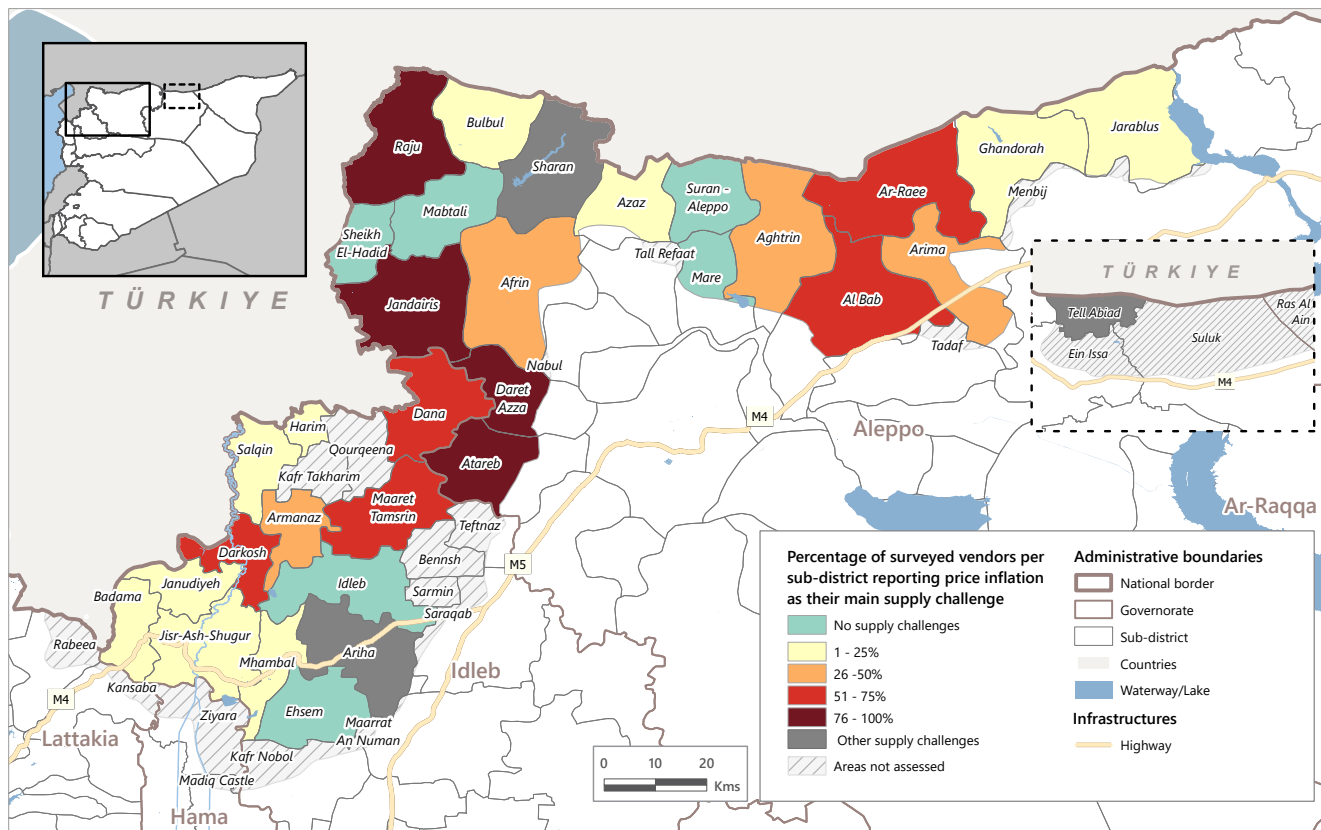
Regional median price of hygiene items, TRY



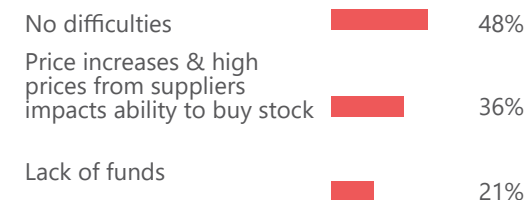
*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMML.

** Due to insufficient data, it was not possible to calculate the water trucking SMEB.

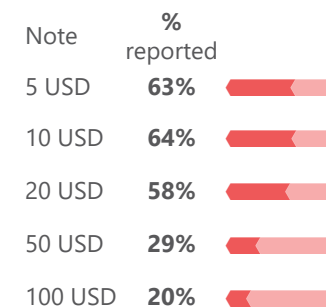
% of surveyed vendors reporting lack of funds impacting their capacity to secure stocks



Top 3 reported supply challenges, % of surveyed vendors



% of vendors reporting limited USD denominations



Supply challenges

Almost half of surveyed vendors (48%) reported that they faced no supply challenges in December. Of those that did report challenges, price inflation and lack of funds were the top reported reasons.

Regarding the impact of recent events on traders and consumers ability to physically access marketplaces in the previous 7 days, 19% of vendor KIs in Greater Idlib reported access barriers in December compared to only 3% in October. Active or ongoing fighting was reported as the most common barrier (15% of vendors). In addition, the number of vendor KIs

reporting that security issues had negatively impacted their business in the previous 7 days increased from 3% in Northern Aleppo and 1% in Greater Idlib in October, to 14% and 15% in December.

When asked if they have faced any difficulties in keeping their shop operational or restocked over the past 7 days, 66% of vendors in Greater Idlib reported facing difficulties (compared to 47% in October), most notably high supplier prices, lack of funds, and incidents of violence, while in Northern Aleppo the number of vendors reporting facing difficulties remained

consistent (46% vs 46%). In Greater Idlib, "physically dangerous conditions" was reported as a key difficulty to 13% compared to only 4% in October.

Vendors reporting no issues accessing USD banknotes increased from 10 to 18% between the October and December rounds in NWS, despite issues reported in the immediate days after the escalation that some PTT facilities had temporarily closed down.

Methodology

The JMMI aims to inform market-based programming in Northern Syria.

Coverage

Coverage is determined through a combination of identifying key market hubs and partners' field capacity. Firstly, key market hubs are identified using the [Humanitarian Situation Overview in Syria](#) (HSOS), classifying all communities that 5 or more other communities report to rely on for markets as a key market hub. Secondly, these "key market hubs" are reviewed by the field teams for validity purposes. In this step, additional important markets in communities are included. These could be communities that either a) have significant markets but were not included in HSOS coverage, or b) communities that have markets that are important for people living in camps. Finally, we compare the ideal coverage with the capacity of partners and aim to ensure that key market hubs are covered. The actual coverage is, therefore, restricted to the capacity of partners.

Data Collection

In each assessed location, at least three prices (ideally 4) per food & non-food item need to be collected from different traders to ensure the quality and consistency of the collected data. In line with the purpose of the JMMI, only the prices of the cheapest, most commonly bought type of item are recorded for each product, except in cases where otherwise indicated. For example, certain NFI items specific products are monitored at the request of the shelter cluster.

SMEB Calculation:

The cost of the SMEB is determined by multiplying the median price of each item in the respective location by the quantity listed in the table on page 2.

Identification of traders

Field teams identify traders to assess based on the following criteria:

- Traders are retailers selling directly to consumers.
- Traders need to be representative of the local price level.
- Traders have knowledge of the shop operations.

To the extent possible, the same traders are revisited in every data collection round.

Enumerators and training

The data are collected by field staff familiar with local market conditions. They undergo training on the methodology and tools provided by REACH. Training sessions occur each time a new partner joins the JMMI, at partner request, and at scheduled intervals throughout the year, such as when the assessment undergoes changes. Additionally, field teams are equipped with a JMMI Standardised Operational Procedure (SOP) offering guidance on market identification, trader assessment, and pricing. The REACH JMMI team manages the integration of partner feedback on the JMMI SOP, sharing updates, and conducting re-training with the field, as needed. Data collection is carried out using the KOBO Collect mobile application.

Data cleaning and analysis

After data collection, REACH compiles and cleans all partner data, standardizing prices, cross-checking outliers, and calculating the median cost of prices in each assessed location. Follow-ups are initiated with field teams to address data queries, including outliers, missing data, and incorrect entries. The median item prices reported in this factsheet are 'location medians,' designed to mitigate the impact of outliers and variations in data quantity among assessed locations.

Aggregation

The published data is presented at the community, sub-district, district, governorate, and regional levels. At each aggregation level, the median of all prices collected within the unit of analysis is calculated. For example, at the regional level, the median of all prices collected for a specific product in the entire region is calculated, while at the governorate level, the median of all prices collected in that governorate is calculated, and so forth. All SMEB and price index calculations utilize this method.

Challenges and limitations

- Price data reflects only the specific timeframe in which it was collected. Variations may occur between data collection rounds, and any comparisons should be regarded as indicative.
- The JMMI data collection tool requests the cheapest, most commonly bought type of each item to be recorded, as availability varies across regions. Therefore, price comparisons across regions may be based on slightly varying products.
- With current coverage, data is mostly collected from main markets, which may not be representative of rural areas.
- As the JMMI continues to expand and is extended to additional locations, the reported changes in the overall median prices may be driven by shifts in coverage rather than actual price changes.

JMMI data is updated monthly through the [Interactive Dashboard](#) where users can filter for SMEB components of interest, currencies, and assessed areas.

About the CWG

The JMMI exists within the framework of the Cash Working Group (CWG). In northwest Syria (NWS), the CWG was established in May 2014 to analyse the impact of the ongoing conflict on markets in Syria and guide the implementation of humanitarian cash and voucher programmes within those markets. For more information about the CWG in NWS, please contact the cash working group coordinator at cbr.twg@gmail.com.

About REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT).

