Northwest Syria | Joint Market Monitoring Initiative (JMMI)

1-8 January 2025

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.**

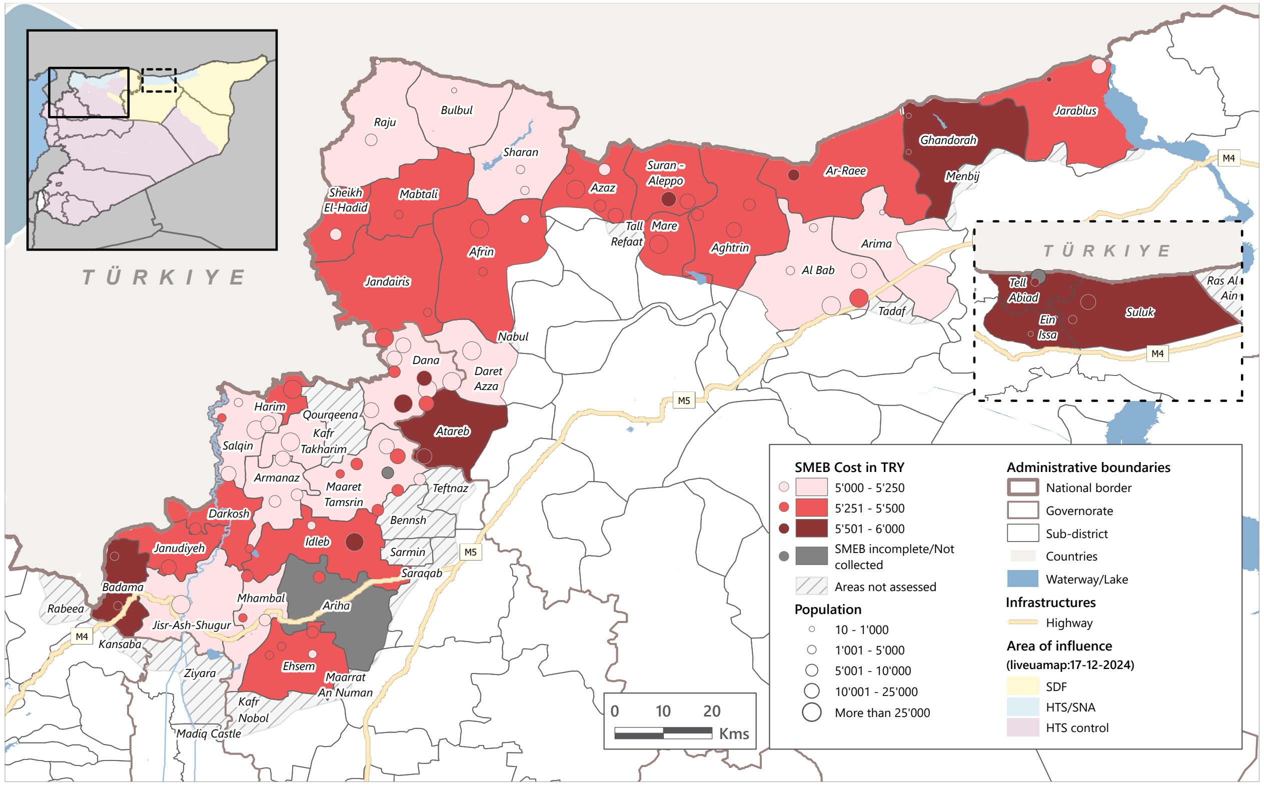
Coverage

3	Assessed governorates
10	Assessed districts
35	Assessed sub-districts
84	Assessed communities
2481	Shops surveyed

KEY INDICATORS

Cost of SMEB	Cost of SMEB Food	USD/TRY
5,280 TRY +6% ▲	3,920 TRY +7% ▲	informal exchange rate
147 USD +3% ▲	108.8 USD +3.6% ▲	36 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 and Northern Aleppo, likely reflecting the greater impact of recent developments in Syria on these areas at the time of data collection.
- Following seasonal trends, **the prices of several monitored fresh food items saw significant changes**. Tomato and onion prices rose by 73% and 4.5%, respectively, while potato and cucumber prices dropped by 20% and 1.6%, respectively.
- **The cost of water trucking in NWS has surged by 56% over the past year**, despite a **slight 3% decrease between December and January**. This continued rise poses significant challenges for households in meeting their basic water needs.
- **Markets** across NWS remained **broadly functional** according to vendor KIs, with **56%** reporting that they faced **no difficulties** or supply challenges in maintaining business operations.
- The number of **vendor KIs** reporting that **security issues** had **negatively impacted** their business in the 7 days before data collection **decreased** from 14% in Northern Aleppo and 15% in Greater Idlib in December, **to 1% in January.**

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.

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

Exchange rate trends

Between December 2024 and January 2025, the Turkish Lira (TRY) depreciated slightly, with the regional informal exchange rate rising by 1% to 36 TRY per USD. Over the past year, the 20% depreciation of the TRY has driven inflation, weakened household purchasing power, and added strain on vendors and traders. In conflict-affected areas like Northwest Syria, currency fluctuations heighten economic uncertainty, disrupt market stability, and make planning, budgeting, and investment more challenging, ultimately impacting 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 widely report that most businesses are refusing SYP due to its extreme volatility, intensifying economic instability and limiting access to essential goods and services in an already fragile market.

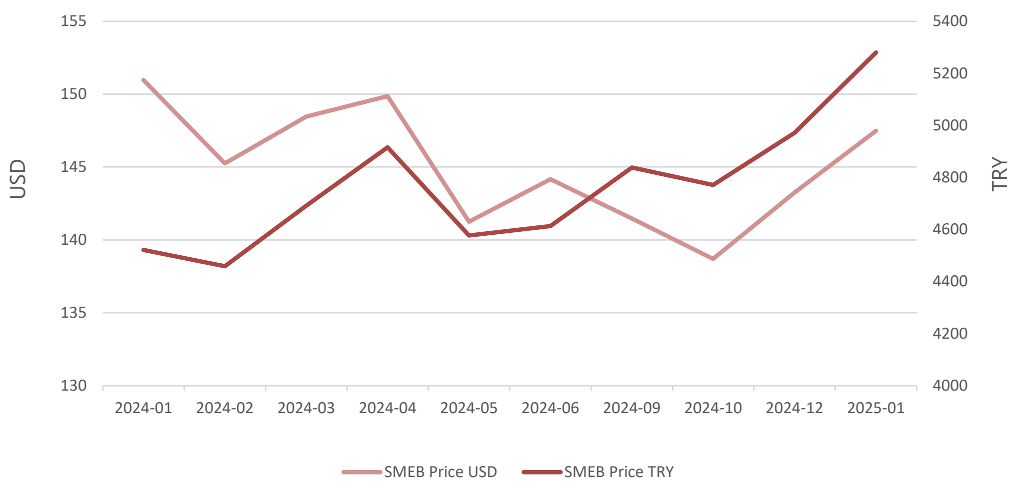
20% ▼

The value of the TRY has depreciated by 20% in the past year.

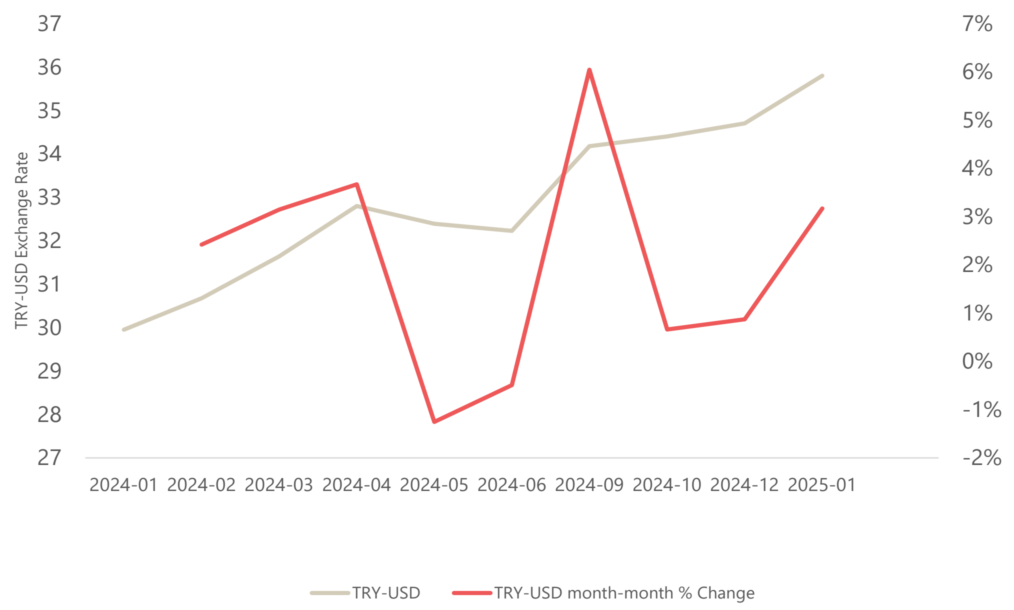
17% ▲

The cost of the SMEB in TRY has increased by 17% in the past year.

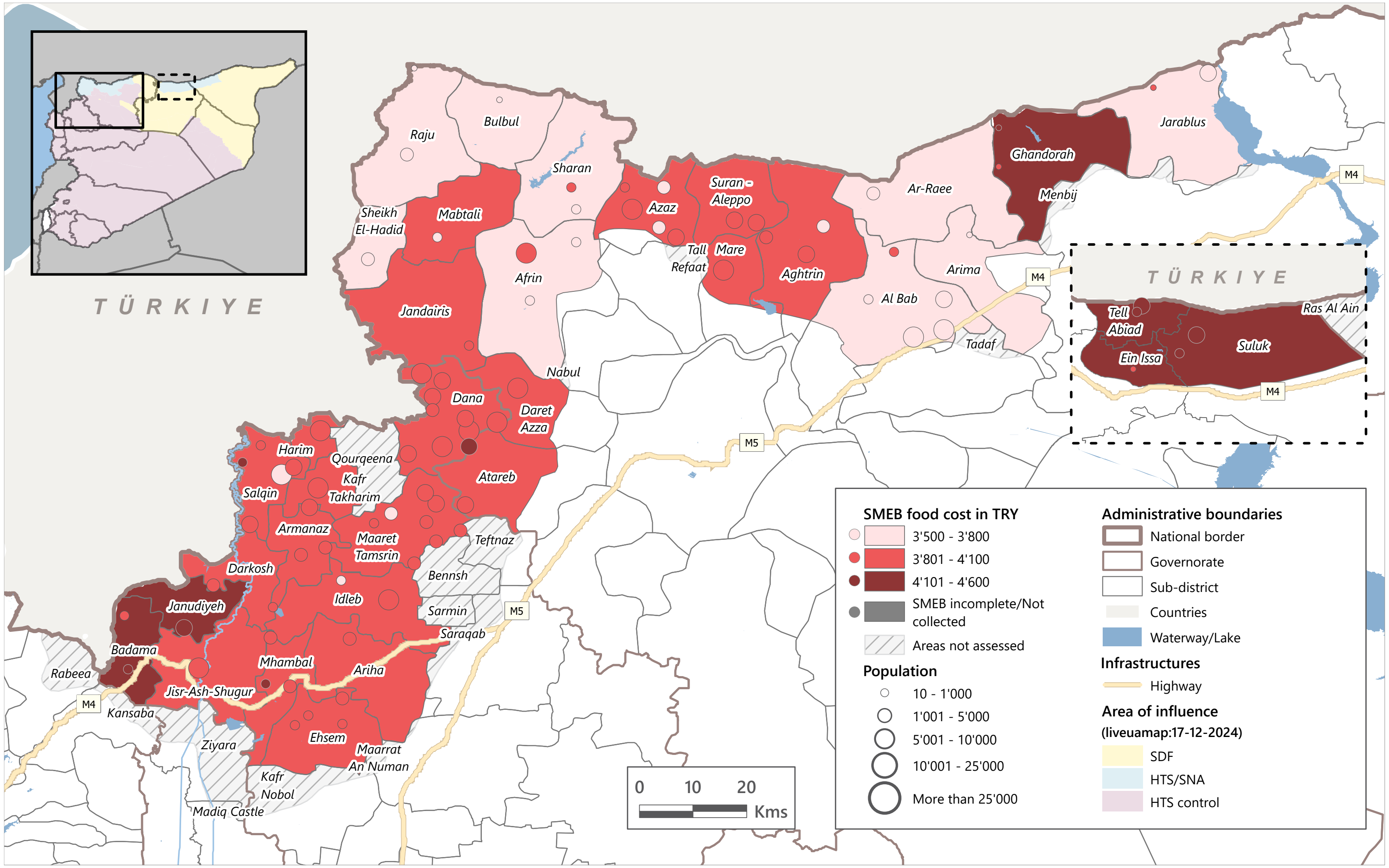
Regional median SMEB prices, TRY and USD



Regional median USD/TRY informal exchange rate trends



SMEB food prices, TRY



Price of SMEB Food, sub-district, TRY

Location	Median Price TRY	Change since December 2024
Aleppo governorate		
Afrin	3,754	+6.7% ▲
Aghtrin	3,816	+5% ▲
Al Bab	3,597	+2.7% ▲
A'rima	3,587	+2% ▲
Ar-Ra'ee	3,732	+5% ▲
Atareb	4,061	+5.3% ▲
A'zaz	3,829	+5.4% ▲
Bulbul	3,763	+6% ▲
Daret Azza	3,930	+1.5% ▲
Ghandorah	4,209	+24% ▲
Jandaris	3,849	+1.2% ▲
Jarablus	3,778	+6% ▲
Ma'btali	3,854	+8% ▲
Mare'	3,823	+16.5% ▲
Raju	3,731	+6% ▲
Sharan	3,767	+2.6% ▲
Sheikh El-Hadid	3,782	+1.6% ▲
Suran	3,839	+12% ▲
Idleb governorate		
Ariha	4,023	+9% ▲
Armanaz	3,920	+6% ▲
Badama	4,276	+8% ▲
Dana	3,924	+6% ▲
Darkosh	4,028	+11% ▲
Ehsem	3,996	+4% ▲
Harim	4,061	+7.4% ▲
Idleb	3,912	+7% ▲
Janudiyeh	4,143	+11% ▲
Jisr-Ash-Shugur	3,927	+6.7% ▲
Kafr Takharim	3,908	No data
Maaret Tamsrin	4,007	+7.6% ▲
Mhambal	3,961	+8% ▲
Salqin	3,980	+8% ▲
Ar-Raqqa governorate		
Ein Issa	4,101	No data
Suluk	4,330	No data
Tell Abiad	4,279	-1% ▼

INTER-AGENCY CWG CASH WORKING GROUP NorthWest Syria (NWS)

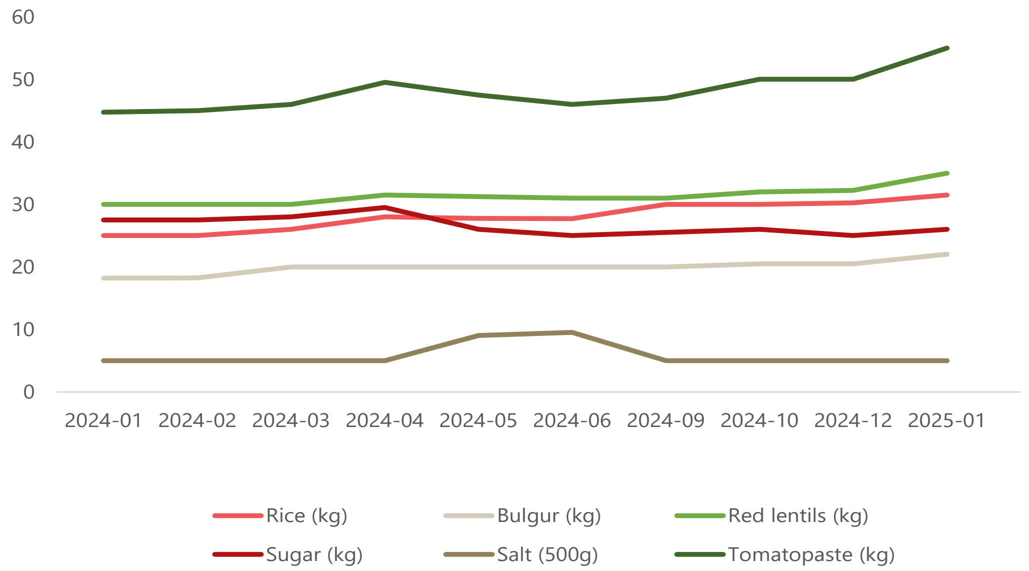
REACH Informing more effective humanitarian action

Food price trends

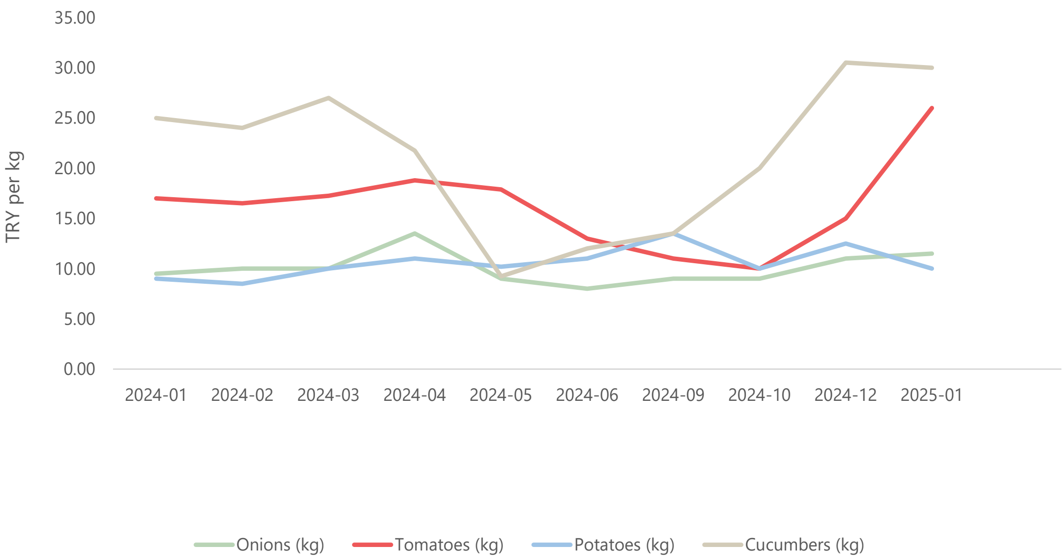
The price of the SMEB food component rose 7% from December 2024 to January 2025, totaling a 19% annual increase, mainly due to the TRY's depreciation. Prices surged across Greater Idlib and Northern Aleppo, driven by December's conflict escalation and population movements. The highest increases were seen in Darkosh (11%), Janudiyeh (11%), and Ariha (9%) in Idlib, while Ghandorah (24%) and Mare' (16.5%) in Aleppo faced sharp rises. These trends underscore the region's market fragility, with currency instability and supply disruptions worsening food insecurity.

Among all monitored food categories, bulk food items experienced the most significant price surges, with red lentils, bulgur, rice, sugar, and tomato paste increasing by 8.5%, 7.3%, 4%, 4%, and 10%, respectively. These rising costs reflect broader inflationary pressures, compounded by ongoing currency depreciation and supply chain disruptions. Given the reliance of many households on these staples for daily nutrition, such price hikes further strain on already vulnerable populations, exacerbating food insecurity and limiting purchasing power, particularly for low-income families.

Regional median price of bulk food items, TRY



Regional median price of vegetables, TRY



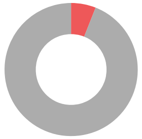
Food price changes

Item	Unit	Median Price TRY	1-month change (TRY) (December)	Median Price USD*
Bulk food items				
Bulgur	1kg	22	+7.3%▲	0.61
Red lentils	1kg	35	+8.5%▲	0.97
Rice	1kg	32	+4%▲	0.89
Flour	1kg	15	-3% ▼	0.42
Salt	500g	5	0%	0.14
Sugar	1kg	26	+4%▲	0.72
Tomato Paste	1kg	55	+10%▲	1.53
Vegetables				
Tomatoes	1kg	26	+73%▲	0.72
Potatoes	1kg	10	-20% ▼	0.28
Cucumbers	1kg	30	-1.6% ▼	0.83
Onions	1kg	12	+4.5%▲	0.33

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

Food availability

The graphs below highlight cucumbers and subsidized bread, which were the most commonly reported unavailable food items by vendors in their communities. This shortage reflects ongoing supply challenges and market instability, further impacting household access to essential food staples.



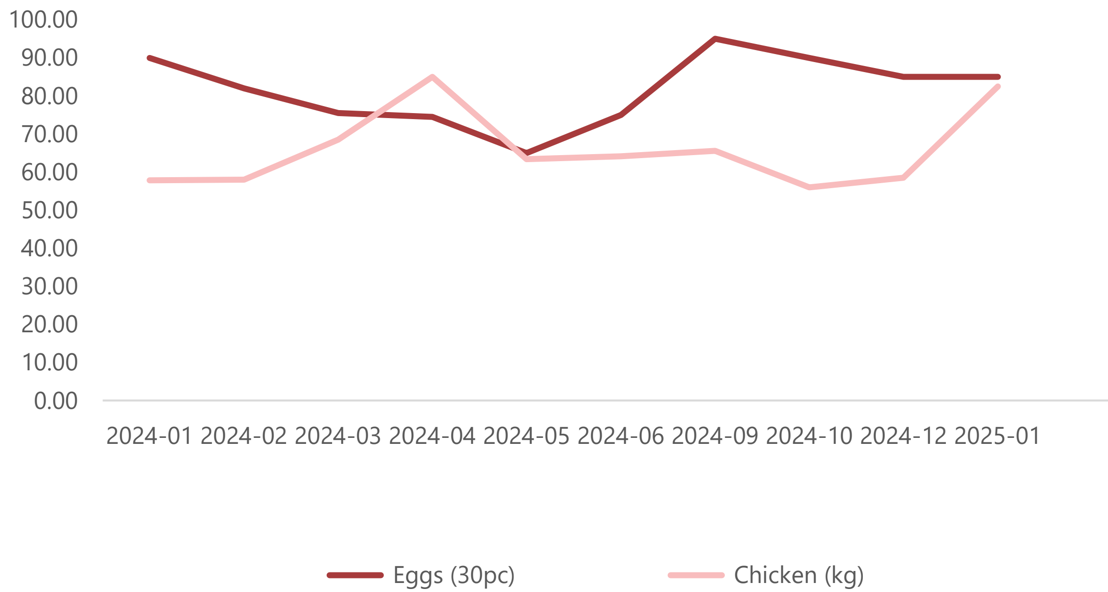
6%

of surveyed vendors in January reported cucumber was not available in their community.

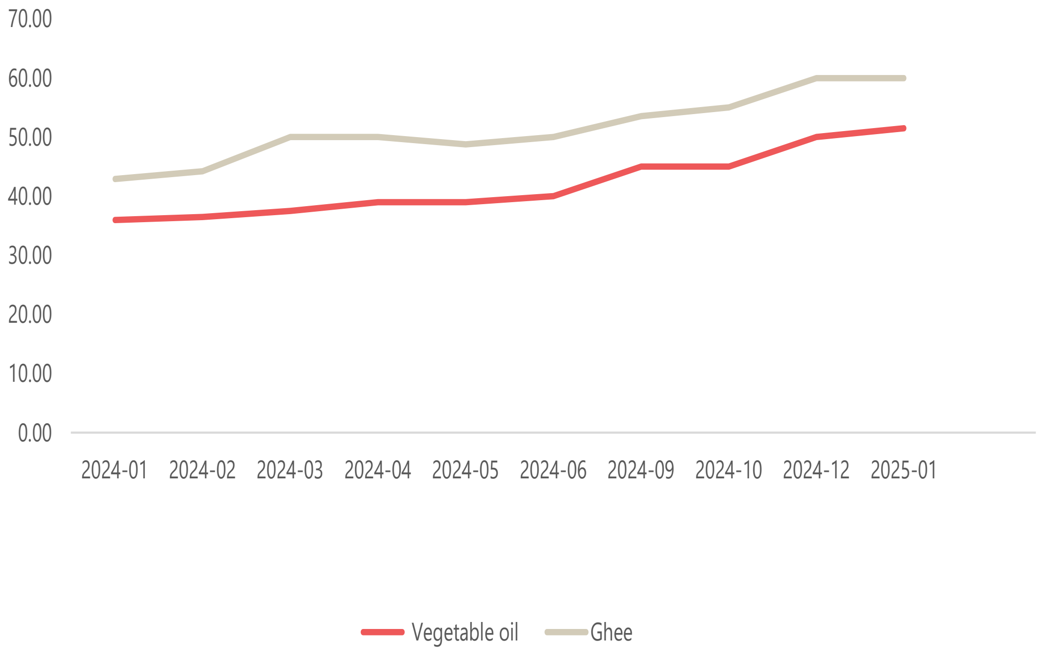
60%

of surveyed vendors in January reported subsidised bread was not available in their community.

Regional median price of poultry items, TRY



Regional median price of vegetable oil, TRY



Food price changes

Item	Unit	Median Price TRY	1-month change (TRY)	Median Price USD*
Cooking oils				
Ghee	1kg	60	0%	1.67
Vegetable oil	1L	52	+3%▲	1.44
Poultry				
Chicken	1kg	83	+41%▲	2.31
Eggs	1kg	85	0%	2.36
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 saw a slight 3% decrease between December 2024 and January 2025 but remained 56% higher than the previous year, straining household finances and driving negative coping strategies. Rising fuel costs, a key driver of water prices, continue to be a major challenge across the region. In January, REACH field staff and vendors reported widespread diesel and LPG shortages, worsened by increased demand amid ongoing conflict and political instability.

Non-food items availability

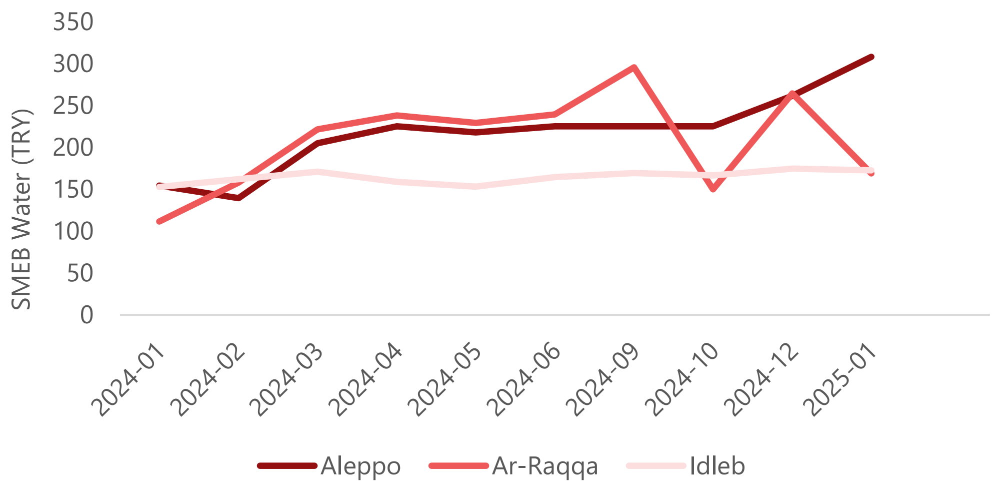
89%

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

92%

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

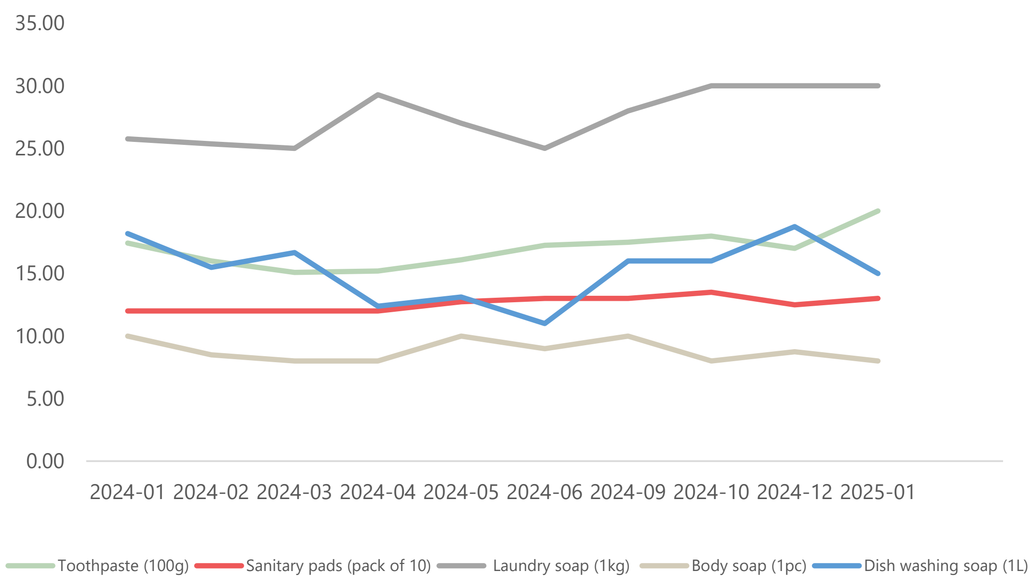
Regional median SMEB water trucking prices, TRY**



Price changes of monitored non-food items

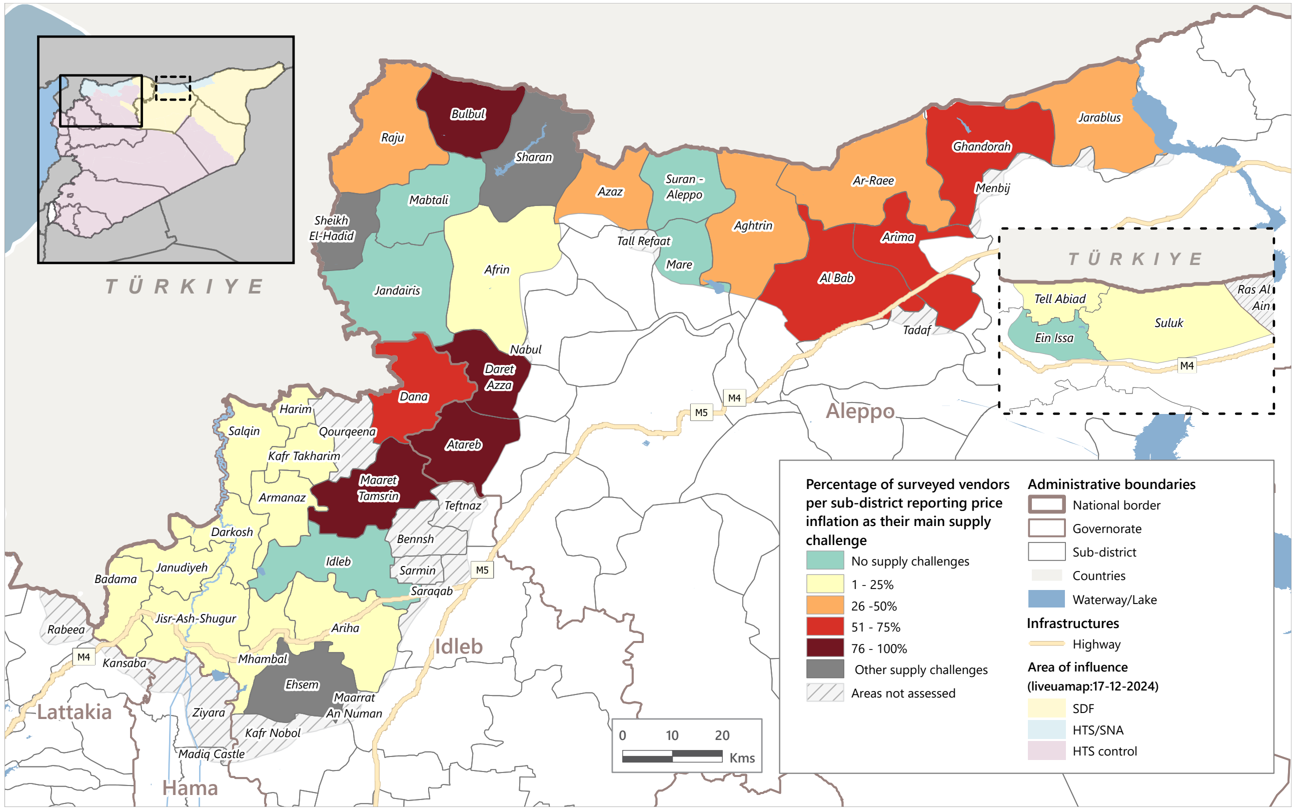
Item	Unit	Median Price TRY	1-month change (TRY)	Median Price USD*
Non-food items	SMEB			
Bathing soap	1pc	8	-11% ▼	0.22
Sanitary pads	10pc	13	+4%▲	0.36
Toothpaste	100g	20	+17.6%▲	0.56
Laundry powder	1kg	30	0%	0.83
Dish soap	1L	15	-20% ▼	0.42
Cooking fuels				
Kerosene	1L	No data	No data	No data
LPG gas	1L	64	+2.5%▲	1.78
Water trucking				
Water trucking	1L	0.05	-3.4% ▼	0.0014
Internet				
Mobile data	1gb	32	-14% ▼	0.89
Transportation fuels				
Imported diesel	1L	37	+2.7%▲	1.03
Imported petrol	1L	42	-6.7% ▼	1.17
Manually refined diesel	1L	33	+65%▲	0.92
Manually refined petrol	1L	35	+5.3%▲	0.97

Regional median price of hygiene items, TRY



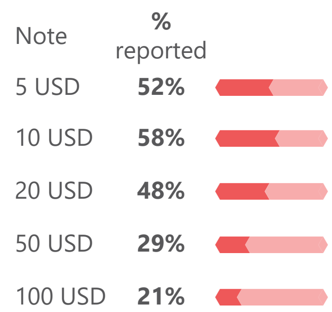
*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMMI.
** Due to insufficient data, it was not possible to calculate the water trucking SMEB.

% 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

More than half of surveyed vendors (56%) reported that they faced no supply challenges in January 2025. 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 past seven days, 10% of vendor key informants (KIs) in Greater Idlib reported access barriers in January 2025, down from 19% in December 2024. Limited transportation options were cited as the most common barrier (4% of vendors), along with difficulties in accessing vendors for individuals with disabilities or mobility issues. Additionally, the proportion of vendor KIs reporting that security concerns had negatively affected their business in the past 7 days of data collection declined from 14% in Northern Aleppo and 15% in Greater Idlib in December to 6% and 1% in January, respectively.

When asked about challenges in keeping their shops operational or restocked over the past 7 days, 57% of vendors in Greater Idlib reported no difficulties, compared to 53% in Northern Aleppo and 89% in Ar-Raqqa. Among those facing challenges, the most commonly reported issues across all governorates were high supplier prices, lack of funds, and difficulties in obtaining essential goods.

The percentage of vendors reporting no issues in accessing USD banknotes increased from 18% in December to 23% in January across NWS. Northern Aleppo had the highest proportion of vendors reporting no issues (29%), compared to 20% in Ar-Raqqa and 18% in Greater Idlib.

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 in coverage 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).