

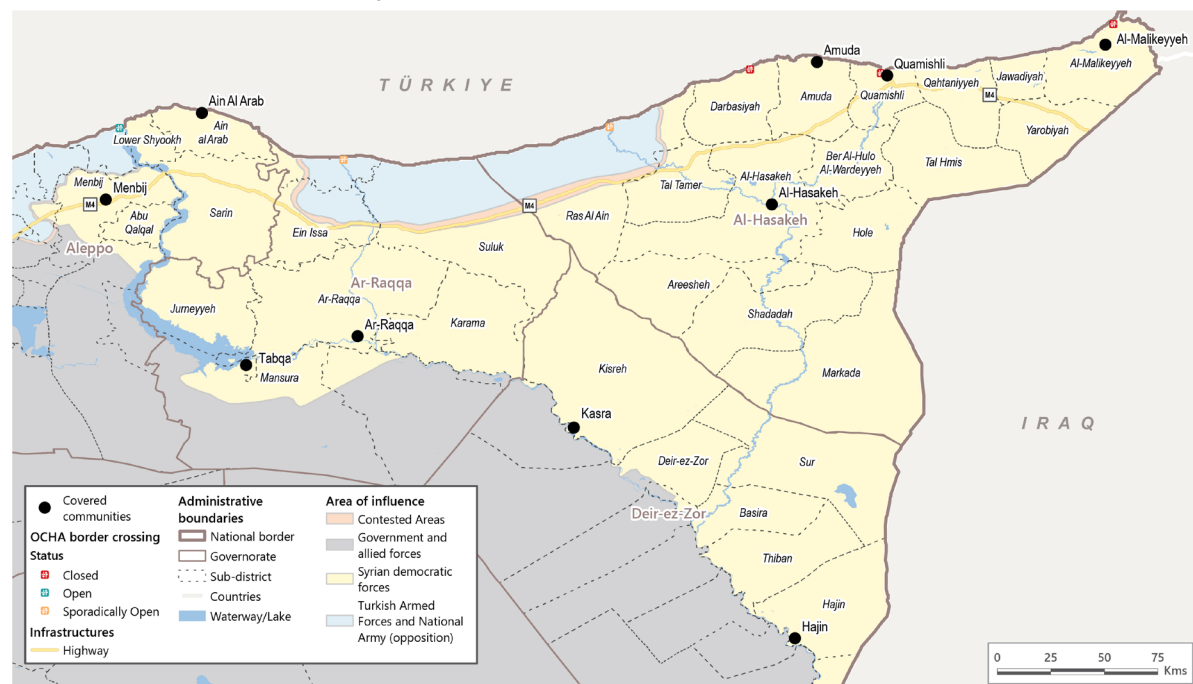
Northeast Syria (NES) fuel price and availability rapid assessment

10th of November 2024 | Northeast Syria

Context & Rationale

Since October 23rd, conflict activity in Northeast Syria has intensified, with a sharp increase in airstrikes and shelling across Hassakeh, Aleppo, and Raqqa Governorates, totaling 63 recorded strikes by October 31st. This escalation, following similar events in October 2023 and January 2024,¹ has severely damaged key civilian infrastructure, including croplands, silos, mills,² medical facilities, main access roads, and energy facilities. Notably, the region's sole gas distributor, the Sweidiyeh gas-powered station, was reportedly out of service as of the 27th of October, alongside significant reported damages at two refineries and four pumping stations across NES.³ Damage to energy infrastructure is likely to increase generator dependency, reduce fuel availability, and drive up prices, impacting essential services such as WASH and healthcare. The situation is further strained by winter's approach, with communities facing greater needs for heating and cooking resources. The humanitarian response is further challenged by the recent displacement of over 50,000 individuals from Lebanon, as reported by UNHCR on October 26th,⁴ which adds pressure on already limited resources. This assessment tracks changes in fuel and gas prices and availability across selected NES markets, aiming to support a more informed humanitarian response regarding the potential impacts on essential services, supply chains, and operational capacity. For more details on the methodology, please refer to the [Methodology overview](#).

Map 1: Communities covered by the assessment



Key findings

- **The regional median price of oil-derived products sold at fuel stations remained stable between the two rounds of data collection** (30/10/2024 and 04/11/2024 respectively), **while median prices in the black market and communes⁵ generally fluctuated.** The highest recorded regional median price increase was 4% for both petrol and diesel on the black market.
- **Black market supply chains appear to perform better in terms of product availability compared to those of communes and fuel stations,** with fewer black market vendors reporting stockouts of the various oil-derived products assessed in the 7 days prior to the interview.
- While **the black market exhibited better availability of oil-related products compared to formal markets, it also saw the highest price increases for petrol and diesel between the two rounds.** In contrast, formal markets showed a higher tendency toward shortages, and more stable oil-related median prices.
- **Gas cylinders (20kg),** commonly used for essential household and commercial purposes such as cooking and heating, **appear to have been more susceptible to shortages and stockouts than petrol and diesel products** in the 7 days prior to the interview, both on the black market and in communes.
- **The quasi-totality of vendors operating in formal markets, both fuel stations and communes, reported difficulties in securing supplies** in the 7 days prior to data collection, with insufficient oil/gas production being the most frequently cited cause.

Table 1: Proportion of vendors reporting stockouts of at least one day in the week prior to data collection (Round 2 - 4/11/2024), among those who typically sold the product before October 23rd, disaggregated by product

Vendor type	Fuel product	Ain Al Arab	Al-Ha-sakeh	Al-Ma-likeyyeh	Amuda	Ar-Raqqa	Hajin	Kasra	Menbij	Qua-mishli	Tabaqa	Total
Fuel stations	Unsubsidised petrol	2/2	1/1	3/3	1/1	2/2	NA	NA	3/3	2/2	4/4	17/18
	Subsidised petrol	2/2	2/2	3/4	1/1	0/3	NA	NA	3/3	1/1	1/3	13/19
	Unsubsidised diesel	2/2	1/2	2/3	1/1	0/2	NA	NA	3/3	2/2	2/2	13/17
	Subsidised diesel	No data	0/1	2/3	1/1	1/1	NA	NA	No data	2/2	No data	6/8
	Imported petrol	No data	0/1	No data	No data	No data	NA	NA	0/3	0/1	No data	0/5
Black market	High quality diesel	4/4	0/6	NA	No data	0/4	0/6	0/6	1/4	3/4	1/1	9/34
	High quality petrol	No data	0/6	NA	1/1	0/6	0/6	0/6	1/4	0/5	0/2	2/36
	Kerosene	No data	No data	NA	No data	0/4	1/6	0/6	0/4	No data	No data	1/20
	LPG cylinders (20kg)	1/1	4/4	2/2	1/1	1/5	4/4	0/2	4/4	3/6	3/3	23/32
Communes	LPG cylinders (20kg)	4/4	4/4	4/4	2/4	4/4	3/4	4/4	4/4	4/4	4/4	37/39

Table 1 suggests that overall, black market supply chains may be less affected in terms of product availability compared to communes' and fuel stations', with smaller proportions of black market vendors reporting stockouts of the different products assessed in the 7 days prior to the interview. Additionally, despite prior shortages, 27 out of 32 black market vendors reported gas cylinder availability on the day of data collection, compared to only 10 out of 39 commune vendors. Similarly, while 35 out of 39 black market vendors who sold high-quality, manually refined petrol before October 23rd were still offering it on the day of data collection, only 6 out of 18 fuel stations selling unsubsidized petrol and 10 out of 19 stations selling subsidized petrol prior to October 23rd, reported having it available.

Table 2: NES-wide median price⁶ (SYP) change, disaggregated by product

Vendor type	Fuel product	30/10/2024	04/11/2024	% change
Fuel stations	Subsidised diesel	525	525	0%
	Unsubsidised diesel	4700	4700	0%
	Subsidised petrol	425	425	0%
	Unsubsidised petrol	4700	4700	0%
	Imported petrol	15660	15660	0%
Black market	High quality diesel	6000	6250	4%
	High quality petrol	8625	9000	4%
	Kerosene	7875	7875	0%
	LPG cylinders (20kg)	182500	175000	-4%
Communes	LPG cylinders (20kg)	115000	117500	2%

Table 3: Top 3 most frequently reported supply chain challenges in the week prior to data collection, disaggregated by formal market channels assessed (Round 2 - 4/11/2024)

	Fuel stations (N=36)	Communes (39)
Production is insufficient (reduced oil / gas production)	72%	69%
Increased demand	64%	59%
Supplier is unable to provide enough stock	61%	54%

Table 2 indicates that, while the NES-wide median price of products sold at fuel stations remained consistent between the two rounds of data collection, median prices on the black market and in communes generally fluctuated. Notably, while the black market exhibited better availability of oil-related products compared to formal markets, it also saw the highest price increase for petrol and diesel between the 30th of October and the 4th of November. In contrast, formal markets showed a higher tendency toward shortages, with prices remaining stable at fuel stations and increasing at a slower rate in communes. This could be explained by the fact that formal markets have controlled prices that cannot increase to match demand, leading to higher demand at lower prices and resulting in shortages. On the black market, however, prices can rise to meet what consumers are willing to pay, which reduces demand at higher prices and makes supply shortages less likely.

Methodology Overview

This assessment, developed in coordination with the NES NGO Forum, employed a quantitative approach involving weekly interviews with fuel and gas vendors across selected communities in Northeast Syria (NES). Designed with a longitudinal aspect, the assessment aims to enhance the accuracy of monitoring fuel availability and accessibility by interviewing the same vendors weekly whenever feasible. In each community, a tentative weekly quota of four interviews was set for four vendor categories: fuel stations, black market fuel vendors, black market gas vendors, and commune gas vendors. The following oil-derived products were assessed: manually refined petrol and diesel for transportation, kerosene, and LPG for domestic use.

The assessment covered ten communities across 3 Governorates: Ain al Arab, Al-Hasakeh, Al-Malikeyyeh, Al-Thawrah, Amuda, Ar-Raqqa, Hajin, Kasra, Menbij, and Quamishli. Data presented includes two rounds of data collection, conducted on 30/10/2024 with 147 surveys and 4/11/2024 with 152 surveys respectively.

This factsheet provides an aggregated summary of key findings at both community and regional levels. Due to the purposive sampling approach and limited sample size, findings are indicative only.

Assessment sample - Round 2 (04/11/2024)

Community	Black market - Fuel	Black market - Gas	Communes	Fuel sta- tions	Total
Ain Al Arab	4	1	4	4	13
Al-Hasakeh	6	4	4	4	18
Al-Malikeyyeh	NA	2	4	8	14
Amuda	1	1	4	4	10
Ar-Raqqa	10	5	4	4	23
Hajin	6	4	3	NA	13
Kasra	6	2	4	NA	12
Menbij	4	4	4	4	16
Quamishli	6	6	4	4	20
Tabaqa	1	3	4	4	13
Grand Total	45	32	39	36	152

Endnotes

- 1 Notheast (NES) Syria NGO Forum (16/01/2024), [“Escalation of Hostilities in Northeast Syria”](#), ReliefWeb
- 2 Northeast (NES) Syria Food Security and Livelihoods (FSL) Working Group (27/10/2024), “FSL impact from the hostilities in Northeast Syria”
- 3 Notheast (NES) Syria NGO Forum (31/10/2024), [“Escalation of Hostilities in Northeast Syria”](#), ReliefWeb
- 4 UNHCR - Sub-office Qamishli (26/10/2024), “Flash update #11
- 5 A commune is a local community-based organization and the smallest unit of governance within the Autonomous Administration of North and East Syria (AANES).- Emergency Response - Northeast Syria”
Amongst other roles, communes distribute essential, subsidized goods at affordable prices.
- 6 The NES-wide median price was determined by taking a simple median of the median prices calculated at the community level.

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).