

Northern Syria Market Monitoring Exercise

September 2015

Cash-Based Responses
Technical Working Group

REACH Informing
more effective
humanitarian action

INTRODUCTION

To understand market functionality in northern Syria and how markets cope with challenges created by the conflict, the Cash-Based Responses Technical Working Group (CBR-TWG) and REACH conduct monthly monitoring of key markets. In each assessed market, the field teams record the prices and stock levels of selected food and non-food items (NFIs) sold by local traders and retailers. Data collectors also monitor the prices of several types of fuel to understand the availability and pricing of different fuel types. Basic commodities have been identified based on what is typically available, sold and used by an average Syrian household. Many of these items are components of the Survival Minimum Expenditure Basket (SMEB), detailed in the table to the right, which outlines the minimum culturally-adjusted group of items required for survival for a six-person household over a one-month period.

This report provides an overview of price ranges and medians for key foods, NFIs and types of fuel across the areas assessed, as well as of water trucking expenses and currency exchange rates. In order to illustrate variation in prices and availability, REACH has used the collected data to map the price of an SMEB in each subdistrict. The cleaned data sets are available on the REACH Resource Centre and are distributed to CBR-TWG partners, as well as to the clusters.

WHAT IS THE CASH-BASED RESPONSES TECHNICAL WORKING GROUP?

The Cash-Based Responses Technical Working Group (CBR-TWG) was established in March 2014 to analyse the impact of the ongoing conflict on markets in Syria and to guide the implementation of humanitarian cash and voucher programs within those markets.

METHODOLOGY

Between 14 and 20 September 2015, a network of field enumerators affiliated with CBR-TWG members collected detailed information about the availability and prices of key food items, non-food items and fuel in northern Syria. Ten partners (CARE/Shafak, Concern, GOAL, IRC, Mercy Corps, the Norwegian Refugee Council, People in Need, REACH, Save the Children and Solidarités International) contributed data from 33 subdistricts across Idlib, Aleppo, Ar-Raqqa, Deir ez-Zor and al-Hasakeh governorates.

Enumerators were trained on methodology and tools by the REACH assessment team and CBR-TWG members. Each enumerator assessed three to five shops in the main market in their assigned subdistrict, using surveys to elicit information about prices, the availability of stock and the time needed to replace current stocks.

Nine survey forms were deployed on KoBo to capture price and stock information from different types of establishments, including grocery stores, fuel traders, currency exchange shops and water

CHALLENGES AND LIMITATIONS

CBR-TWG partners closely monitor the security context in the subdistricts where they have committed to collect data and are encouraged not to expose their enumerators to undue risk. In some subdistricts, this means that enumerators cannot collect data from certain communities or neighbourhoods due to the political danger involved. This was the case in the divided cities of Aleppo and Deir ez-Zor, where government-held neighbourhoods could not be surveyed.

For methodological reasons, restocking data from al-Hasakeh governorate could not be analysed alongside data from other governorates.

trucking services, among others. Enumerators used the KoBoCollect Android app to upload data.

In order to be included in the Market Monitoring Exercise, markets had to be permanent in nature, large enough to support at least 2 wholesalers, and diverse enough to provide a sufficient variety of commodities. The shops surveyed within each market had to be housed in permanent structures and had to sell certain commodities to be eligible for inclusion. Enumerators obtained consent from traders prior to administering each survey.

Following data collection, the REACH assessment team compiled and cleaned all partners' data, normalizing prices, cross-checking outliers and triangulating the results using secondary sources. The cleaned data was then analysed by commodity and by subdistrict. Prices were divided into quartiles and boxplots were created to help CBR-TWG members understand the distribution of the data set. In addition, the average cost of an SMEB in each subdistrict was calculated and mapped by the REACH GIS team.

Coordinating a cross-border price monitoring exercise via remote management is inherently challenging, as issues of enumerator training, consistent communication and verification of results are harder to resolve from afar. As the Market Monitoring Exercise grows, aligning the data collection efforts of all participating partners becomes more difficult. CBR-TWG members have sought to overcome these issues by using a single set of online survey forms, uploading all data to a central server, and harmonising procedures to ensure that the data uploaded are as clean and accurate as possible.

ASSESSED GOVERNORATES



SURVIVAL MINIMUM EXPENDITURE BASKET (SMEB) CONTENTS

	Item	Quantity
Food Items	Bread	37 kg
	Bulgur	15 kg
	Chicken	4 kg
	Eggs	6 kg
	Fresh vegetables*	6 kg
	Ghee	7 kg
	Rice	19 kg
	Salt	1 kg
	Sugar	5 kg
	Tomato paste	6 kg
Non-Food Items	Individual soap	12 pcs
	Laundry/dish soap	2 kg
	Sanitary pads	4 packs of 10
	Toothpaste	2 pcs
Fuel	Kerosene	25 L
	(manually refined)	
Water	Water	2790 L
Other	6% float*	6% total value

* Starred items were excluded from SMEB calculations.

SEPTEMBER 2015: NORTHERN SYRIA CONTEXT

During the month of September, no significant security incidents prevented organizations from operating in their areas of intended coverage. In Aleppo governorate, the movement of IDPs in and out of Bab al-Salame camp was temporarily suspended following exchanges of fire between armed groups in the towns of Al-Jamel and Lower Shyookh.

On September 10th, the Bab al-Hawa border crossing was temporarily closed due to a security incident that resulted in the death of one Turkish soldier. In exchange, Turkish authorities opened the border gates for four days during Eid al-Adha to allow refugees to spend the holiday in Syria. Approximately 27,000 Syrians crossed through Bab al-Hawa during this four-day period.

In Idlib, reports indicated increased exchange of fire between non-government forces in and around Atmeh. Although no casualties were reported, this amplified the instability of the area during September. Also, a major attack from the opposition armed groups against the besieged villages of al-Fuah and Kafraya, in Bennsh subdistrict, provoked nearly 10,000 civilians to flee to Maar Dis in northern Hama. After a negotiation process between the government and the opposition, a ceasefire was agreed and civilians were guaranteed safe passage from the area.

COMMODITY PRICE CHANGES

In September 2015, for the first time, CBR-TWG partners systematically collected data on the informal exchange rates between Syrian pounds and US dollars, as well as those between Syrian pounds and Turkish lira, in all assessed markets. The inflation-driven price fluctuations of major commodities, along with the increased use of the Turkish lira in areas close to the border, motivated the CBR-TWG and REACH to add these data points to the Market Monitoring Exercise.

MAIN PRICE CHANGES

**EGGS, TEA, CHICKEN,
GASOLINE, GOVERNMENT PETROL**

There was little substantive variation in exchange rates across northern Syria. The average US dollar sell rate in the areas assessed in September was 333 SYP/USD, ranging from 314 SYP/USD in al-Malikiyeh subdistrict (al-Hasakeh governorate) to 339 SYP/USD in the city of Idlib. The Turkish lira sell rate in the same areas displayed still less variation, with an average of 110 SYP/TRY and a range from 106 SYP/TRY in Daret Azza to 115 SYP/TRY in Deir ez-Zor.

Due to inflation during the month of September, the medians of most monitored food prices increased slightly since August, with the exceptions of bread, rice and tomato paste, the prices of which remained stable. The median price of eggs, on the other hand, increased atypically for the second month in a row, rising from 650 to 700 SYP (2.08 to 2.10 USD, 8%). Tea (1700 to 1800 SYP, 5.43 to 5.41 USD, 6%) and chicken (500 to 550 SYP, 1.65 to 1.65 USD, 10%) also underwent notable increases, though their real values in US dollars stayed constant.

The prices of non-food items remained unusually stable during September, with the only movement of note being a fall in the median price of toothpaste from 125 to 100 SYP (0.40 to 0.30 USD, 20%). Fuel, though, was less consistent. For most assessed types of fuel, median prices remained stable, despite significant localised price spikes affecting all types. The main exceptions were government petrol, the median price of which rose from 425 to 525 SYP (1.36 to 1.58 USD,

MAIN SHORTAGES

**BREAD, KEROSENE,
GOVERNMENT DIESEL**

19%), and gasoline, the median price of which rose from 185 to 250 SYP (0.59 to 0.75 USD, 35%)—a number well above last month's maximum. Interestingly, gasoline also saw a notable decrease in its minimum price due to local subsidies in Deir ez-Zor. All other minimum fuel prices remained stable.

In September, for the first time, the CBR-TWG monitored the price of water delivery via private water trucking services and incorporated its findings into the SMEB calculations. The median price to deliver 1 litre of drinking water fluctuated from 0.15 SYP in Maaret Tamsrin and Afrin to 1.48 SYP in Deir ez-Zor. Though all water trucking services surveyed were privately owned, 29% took their water from publicly owned boreholes and water supply points, in comparison with the 71% that used private boreholes. Chlorinated water was only distributed by 21% of assessed suppliers, mostly in Idlib (Maaret Tamsrin, Harim, Salqin and Qourqeena) and Deir ez-Zor. It should be noted that water in the assessed areas of al-Hasakeh governorate is mostly supplied via private municipal pipelines at a very low fixed cost; the cost of water per litre is therefore negligible.

ISSUES OF AVAILABILITY

Two-thirds of assessed commodities were found in all subdistricts where data was collected. Shortages of bread were evident in Daret Azza, Atareb, Qourqeena, Lower Shyookh and Amuda subdistricts.

Kerosene, meanwhile, was unavailable in seven subdistricts, all of them near al-Hasakeh and Ain al-Arab. Government diesel was also, as usual, quite difficult to find, and was found in fewer than 40 percent of assessed subdistricts. Localised shortages of flour, red lentils, tomato paste, chicken, toothpaste and all types of soap were also observed, though these generally had little effect on the value of the SMEB in affected subdistricts.

In three subdistricts (Tefnaz, Afrin and Tell Abiad), data on the price of water delivery was not collected due to localised circumstances. Though some of these areas faced water shortages earlier in the year, this lack of data should not currently be interpreted as evidence of a shortage.

RESTOCKING TIME

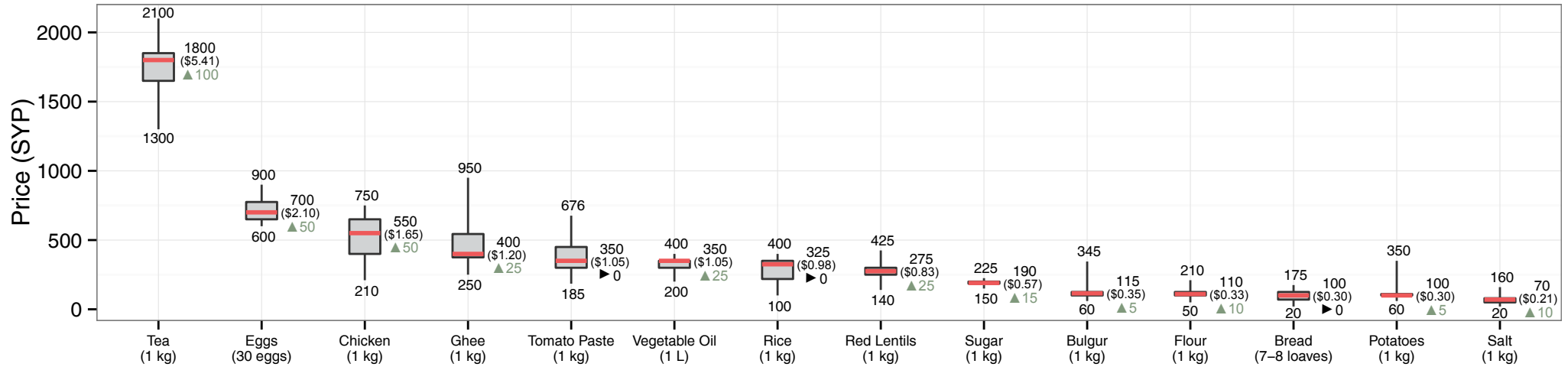
Apart from the localised shortages highlighted above, supply chains throughout the assessed areas seemed to be functioning well, with markets retaining adequate stock of most available items and reporting median restock times of 1 day for all commodities.

However, markets in Ain al-Arab and Lower Shyookh again faced atypical difficulty, reporting shortages of 8 commodities and median restock times of 3 to 5 days for nearly all others. Deir ez-Zor faced similar difficulties, as did Tell Abiad to a lesser extent, with enumerators reporting multiple shortages and long restock times.

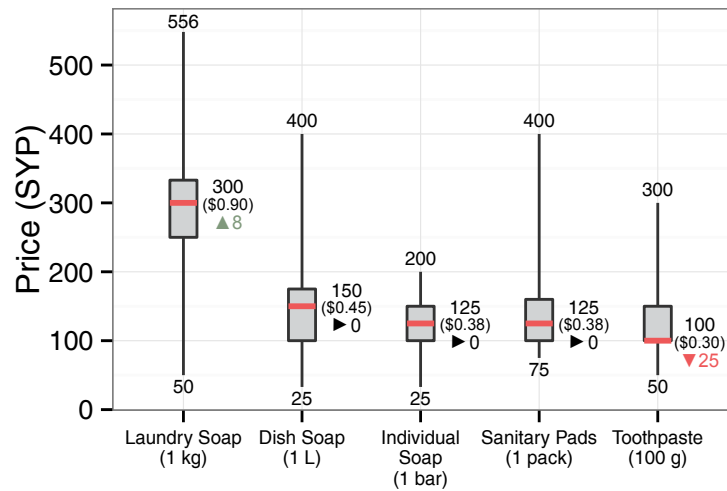
AVERAGE EXCHANGE RATES SEPTEMBER 2015

**333 SYP/USD
110 SYP/TRY**

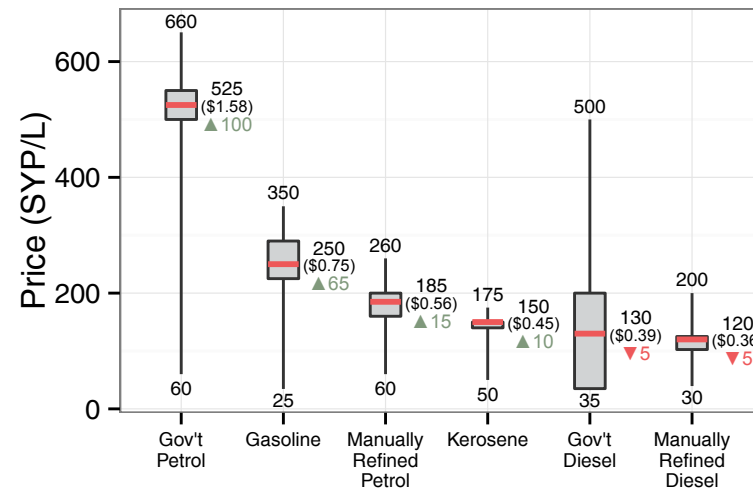
FOOD ITEMS



NON-FOOD ITEMS

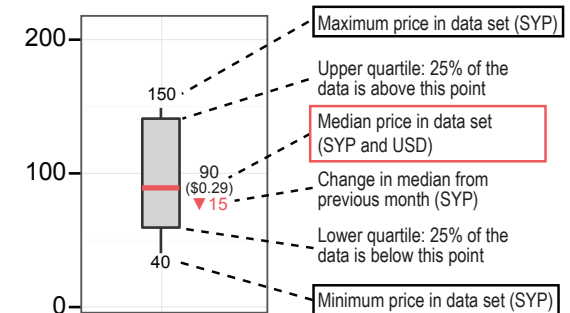


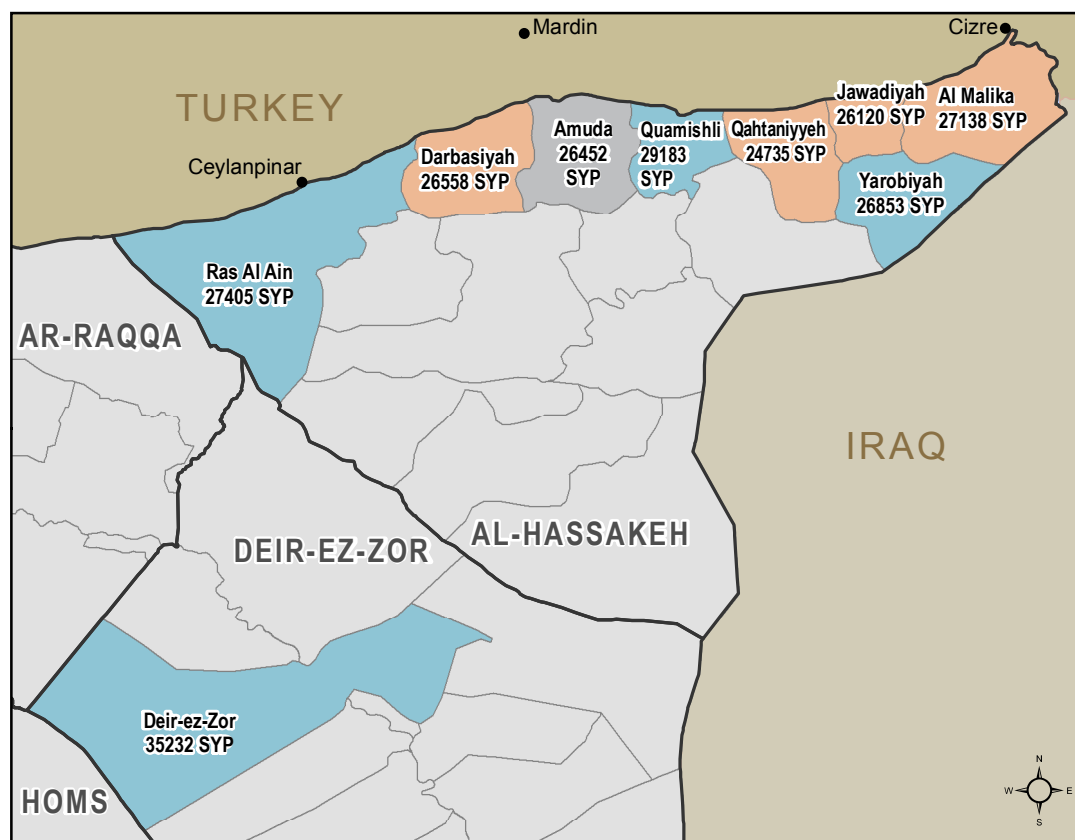
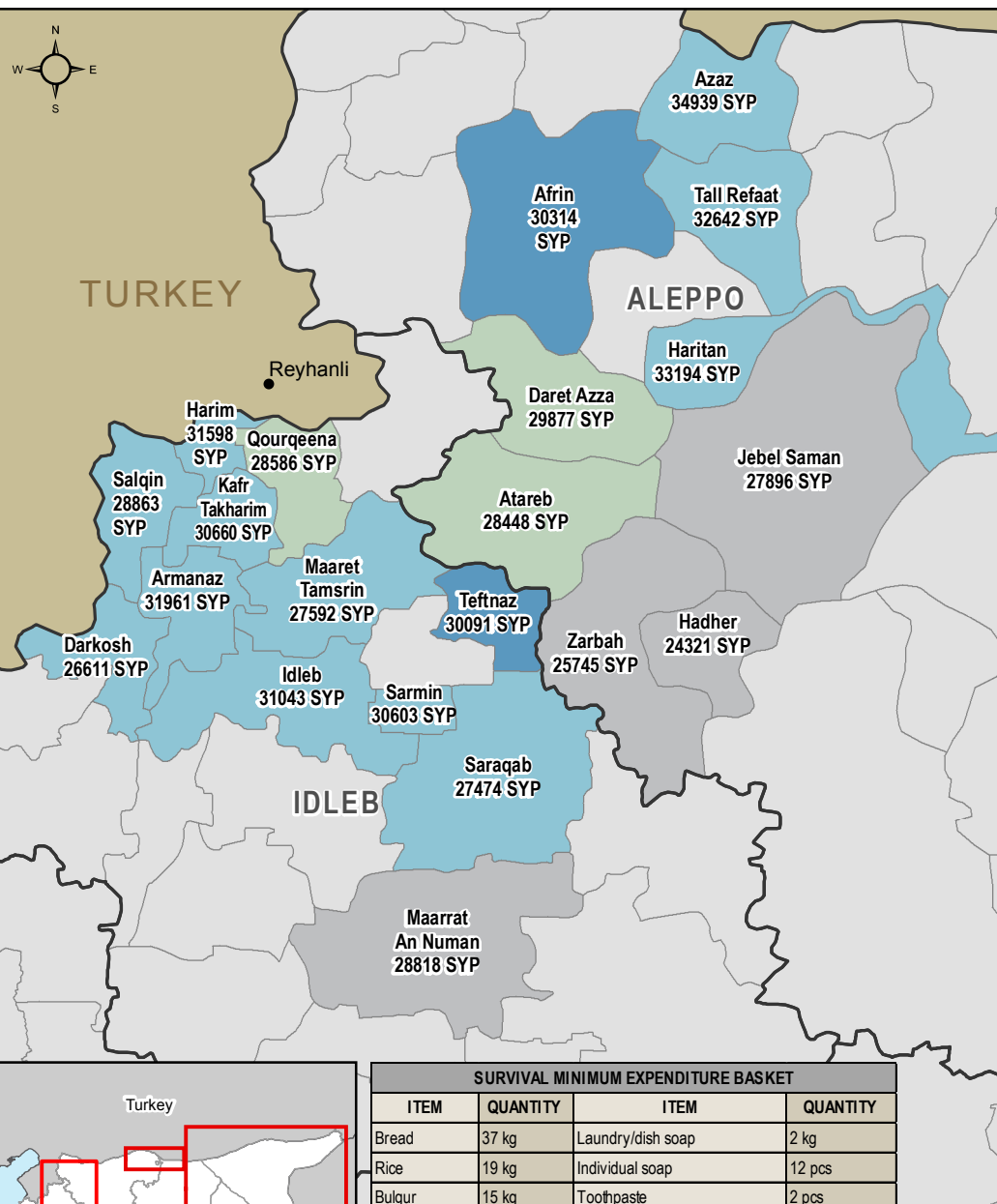
FUEL



How to read a box plot

Box plots provide a variety of data to aid in understanding the distribution of the data set. All price figures in the box plot are in USD.





SURVIVAL MINIMUM EXPENDITURE BASKET			
ITEM	QUANTITY	ITEM	QUANTITY
Bread	37 kg	Laundry/dish soap	2 kg
Rice	19 kg	Individual soap	12 pcs
Bulgur	15 kg	Toothpaste	2 pcs
Ghee	7 kg	Sanitary pads	4 packs of 10
Sugar	5 kg	Dried pulses*	19 kg
Tomato paste	6 kg	Fresh vegetables*	6 kg
Chicken	4 kg	Kerosene (manually refined)	25 L
Eggs	6 kg	Water	2790 L
Salt	1 kg	6% float*	6% total value

* not included in SMEB calculations

- Complete SMEB
- SMEB excluding only water
- SMEB excluding only kerosene
- SMEB excluding only bread
- SMEB excluding other items
- Subdistricts not surveyed

Data sources:
Boundaries - UN OCHA COD
Roads - DIVA GIS
Market monitoring data - REACH, CBR-TWG

Coordinate System: GCS WGS 1984
File: REACH_SYR_SMEB_Sep2015_A4_V2
Contact: reach.mapping@impact-initiatives.org

Note: Data, designations and boundaries contained on this map are not warranted to be error-free and do not imply acceptance by the REACH partners, associates or donors mentioned on this map.