

Northern Syria Market Monitoring Exercise

January 2016

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, field teams record the prices and stock levels of selected food and non-food items (NFIs) sold by local traders and retailers. Commodities have been identified based on what is typically available, sold and used by an average Syrian household. Many 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 during the month of January 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 guide the implementation of humanitarian cash and voucher programmes within those markets.

METHODOLOGY

Between 18 and 24 January 2016, a network of 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. Eight partners (CARE/Shafak, Concern, GOAL, IRC, Mercy Corps, People in Need, REACH and Solidarités International) contributed data from 28 subdistricts across Idlib, Lattakia, Aleppo, ar-Raqqa, Deir ez-Zor and al-Hasakeh governorates.

Ten 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 trucking services, among others. In January, a new form was introduced to monitor the price of winter blankets. In most cases, 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 two wholesalers, and diverse enough to provide a sufficient variety of goods and commodities. The shops surveyed

CHALLENGES AND LIMITATIONS

CBR-TWG partners closely monitor the security context in 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. This was the case in the divided cities of al-Hasakeh, Qamishli and Deir ez-Zor, where government-held neighbourhoods could not be surveyed. In addition, several partners scaled back their coverage and one suspended its participation long-term due to the dangers of rapidly shifting frontlines.

Coordinating a cross-border price monitoring exercise via remote management is inherently

within each market had to be housed in permanent structures and had to sell certain items to be eligible for inclusion.

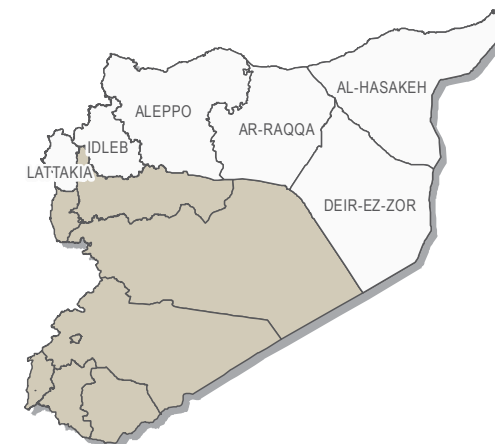
REACH and CBR-TWG members trained all enumerators on the methodology and tools. Each enumerator assessed three to five shops of each type in the main market in their assigned subdistrict, using surveys to collect information about prices, current product inventory and the time needed to replace current stocks. In subdistricts where direct surveying by enumerators was not possible, such as Lattakia and Deir ez-Zor, data collection was conducted through key informants, who included shop owners and suppliers as well as consumers.

Following data collection, REACH and the CBR-TWG compiled and cleaned all partners' data, normalising prices and cross-checking outliers. 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 prices. In addition, the average cost of an SMEB in each subdistrict was calculated and mapped by REACH.

challenging, as issues of enumerator training, consistent communication and verification of results are harder to resolve from afar. CBR-TWG members have sought to overcome these issues by aligning their efforts, 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 accurate as possible.

For methodological reasons, restocking data from al-Hasakeh governorate could not be analysed alongside data from other governorates. Too few prices were collected from Sarmin and Tell Abyad to warrant separate analysis.

ASSESSED GOVERNORATES



SURVIVAL MINIMUM EXPENDITURE BASKET (SMEB) CONTENTS

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

* 6% float was excluded from SMEB calculations due to the commonality of incomplete baskets.

JANUARY 2016: NORTHERN SYRIA CONTEXT

The period from November 2015 to January 2016 saw large-scale shifts in the frontlines in northern Syria, particularly in rural Aleppo and northeastern Latakia governorate. This has created a volatile situation in which enumerators' access to markets has been limited, especially near the frontlines, making it difficult for the CBR–TWG to maintain past months' levels of market coverage and partner participation in the Market Monitoring Exercise.

Partners working in Haritan and Tall Refaat subdistricts north of Aleppo were forced to halt their data collection efforts due to encroaching conflict and widespread insecurity. For the same reason, markets in eastern Aleppo have been inaccessible to enumerators since November. Several formerly covered subdistricts in southern Idlib and northern Hama governorates have been temporarily removed from the Market Monitoring Exercise, as communities and markets there continue to experience intense shelling and destroyed markets and supply chains have proven difficult to rebuild. Finally, partners formerly working in Zarbah and Hadher subdistricts southwest of Aleppo have been forced to suspend operations temporarily due to shifts in the frontlines.

COMMODITY PRICE CHANGES

Currency exchange rates in northern Syria varied remarkably little across governorates and areas of control. The median informal US dollar sell rate in the subdistricts assessed in January was 398 SYP/USD, with local rates ranging from 396 to 400 SYP/USD, a spread of just 4 SYP from Latakia to Deir ez-Zor. January marked the first time the informal

**MEDIAN EXCHANGE RATES
JANUARY 2016**
398 SYP/USD
131 SYP/TRY

MAIN PRICE CHANGES

FRESH VEGETABLES, EGGS, CHICKEN, FUEL

SYP/USD rate broke 400 anywhere in Syria, representing a 6% rise since November. As for the Turkish lira, the median sell rate was 131 SYP/TRY—as opposed to 132 in November—with a range from 130 to 134 SYP/TRY. The stability here indicates that the lira and the pound depreciated at nearly the same rate compared to the dollar between November and January.

The prices of most monitored commodities rose between November and January at rates in excess of inflation. Fresh vegetables, currently out of season, became considerably more expensive. In particular, the median prices of cucumbers (175 to 300 SYP, 0.46 to 0.75 USD, 71%), onions (75 to 125 SYP, 0.20 to 0.31 USD, 67%) and tomatoes (200 to 250 SYP, 0.53 to 0.63 USD, 25%) rose sharply. Median prices also increased substantially for chicken (600 to 712 SYP, 1.59 to 1.79 USD, 19%) and eggs (750 to 850 SYP, 1.99 to 2.14 USD, 13%), with chicken prices varying by region more than those of any other food item. On the other hand, the median prices of bread, rice, ghee and flour remained nearly constant in pounds, which corresponded to a decrease in their real values in USD. That of tomato paste, meanwhile, decreased from 450 to 406 SYP (1.19 to 1.02 USD, -10%), its first fall after months of rapid increases.

The prices of NFIs, too, increased at rates generally in excess of inflation, particularly dish soap, the median price of which rose from 175 to 250 SYP per litre (0.46 to 0.63 USD, 43%). The median price of individual soap remained fairly low, increasing from 130 to 150 SYP per bar (0.34 to 0.38 USD, 15%), but the distribution of prices became much wider compared to November, suggesting that prices vary widely among subdistricts and that

MAIN SHORTAGES

KEROSENE, WATER, CHICKEN, GOVERNMENT DIESEL

soap has become harder to obtain in some areas than in others.

As for fuel, the median prices per litre for all non-government-provided fuels have risen since November, particularly kerosene (175 to 225 SYP/L, 0.46 to 0.57 USD/L, 29%), gasoline (270 to 330 SYP/L, 0.72 to 0.83 USD/L, 22%) and manually refined diesel (130 to 165 SYP/L, 0.34 to 0.41 USD/L, 27%). The median price for government-provided petrol has fallen from 350 to 310 SYP/L since November (0.93 to 0.78 USD/L, -11%), perhaps due to easier access due to the shifting boundaries of the government zone of control. Government diesel, however, remains rare in monitored subdistricts; its low median price reflects the fact that more than half of the monitored markets where it is sold are in al-Hasakeh governorate, where it is provided by local councils at very low flat rates.

Following a pilot program to monitor the prices of selected winterisation commodities in November, the CBR–TWG began in January to monitor the price of winter blankets on a monthly basis, intending them to serve as a year-round proxy for the cost of other winter items. In January 2016, the median price of a 150 x 200 cm winter blanket with a minimum thickness of 5 mm was 3000 SYP, with prices ranging widely from 700 to 11000 SYP depending on the subdistrict and the material and style of blankets available in the market.

The median price to deliver 1 litre of water via private water trucking services was 0.39 SYP, 0.05 higher than in November (a 15% rise). Delivery prices ranged from a low of 0.18 SYP/L in Daret Azza to a high of 0.91 SYP/L in Deir ez-Zor.

ISSUES OF AVAILABILITY

Shortages were more widespread in January than in past months, with only half of monitored subdistricts reporting prices for all SMEB goods. The SMEB items with the most widespread shortages were kerosene, which was not present in six subdistricts, and water from private water trucks, not present in eight subdistricts. Further investigation would be useful to determine whether these water shortages were due to destroyed infrastructure or the inability of water trucking businesses to operate in the current security context.

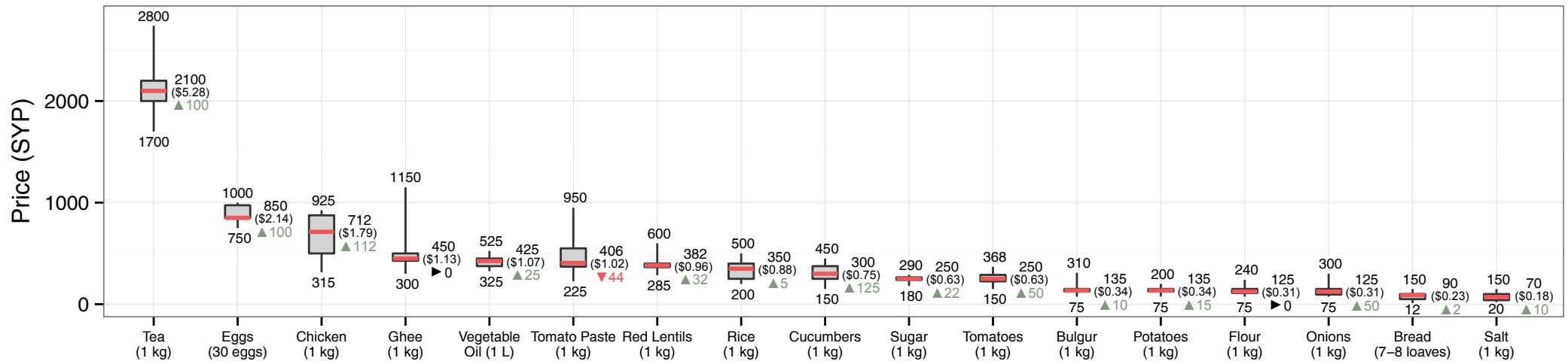
While bread was more widely available than normal, being present in all but one subdistrict, chicken for the first time proved difficult to obtain, with shortages reported in five subdistricts. Several types of fuel not included in the SMEB were locally absent, but as usual, government diesel was by far the most difficult to find, being unavailable in 17 of 28 monitored subdistricts.

RESTOCKING TIME

Apart from the localised shortages highlighted above, supply chains throughout the assessed areas appeared on the whole to be functioning, with individual markets retaining adequate stock of most available items and reporting median restock times of one day for all commodities except government diesel (two days).

Though shortages were relatively common, restocking issues for commodities present in markets were confined to a handful of subdistricts. Markets in Ain al-Arab reported shortages of six commodities and restocking issues with seven more, including commodities with restocking times of longer than three days and those with restocking times exceeding the number of days of stock remaining in the store. The most severe supply chain problems, however, were present in ar-Raqqa (two shortages, 11 commodities with restocking issues) and Deir ez-Zor (two shortages, 15 commodities with restocking issues).

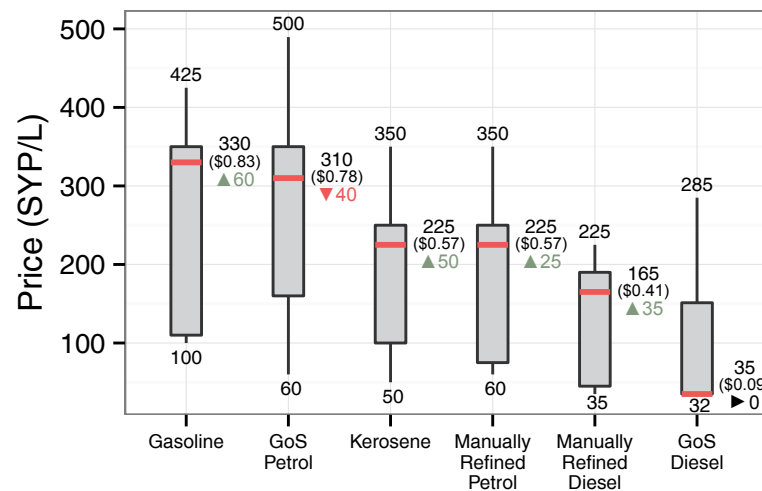
FOOD ITEMS



NON-FOOD ITEMS

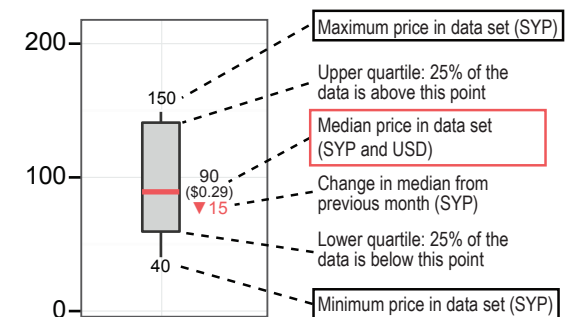


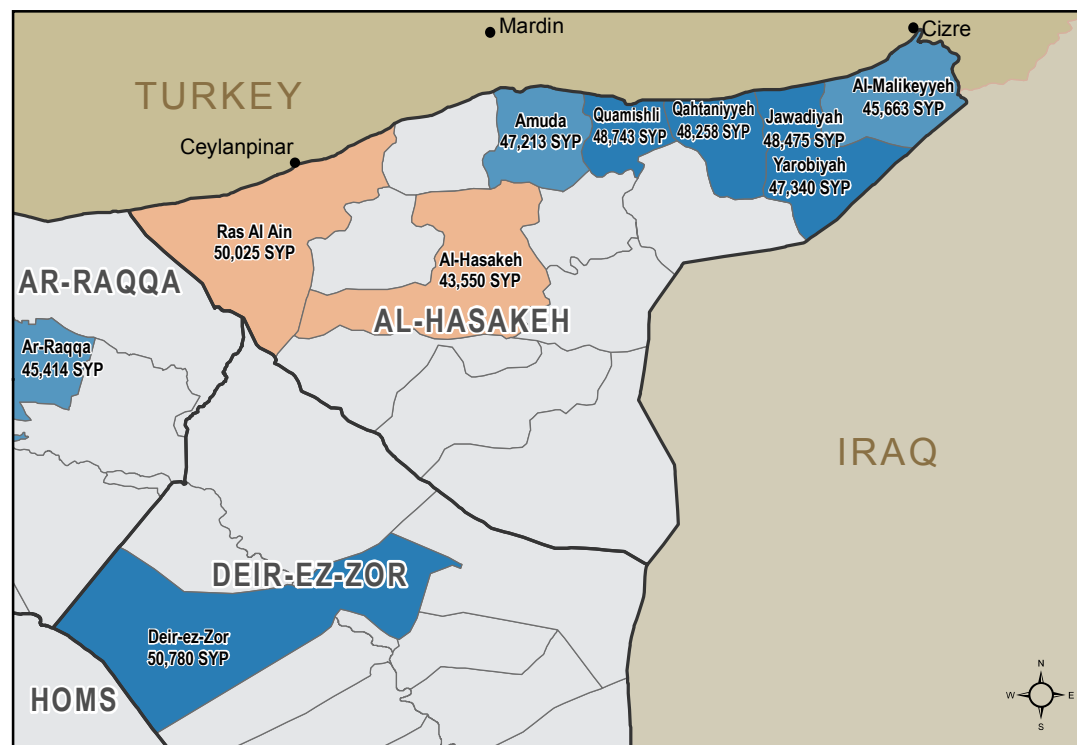
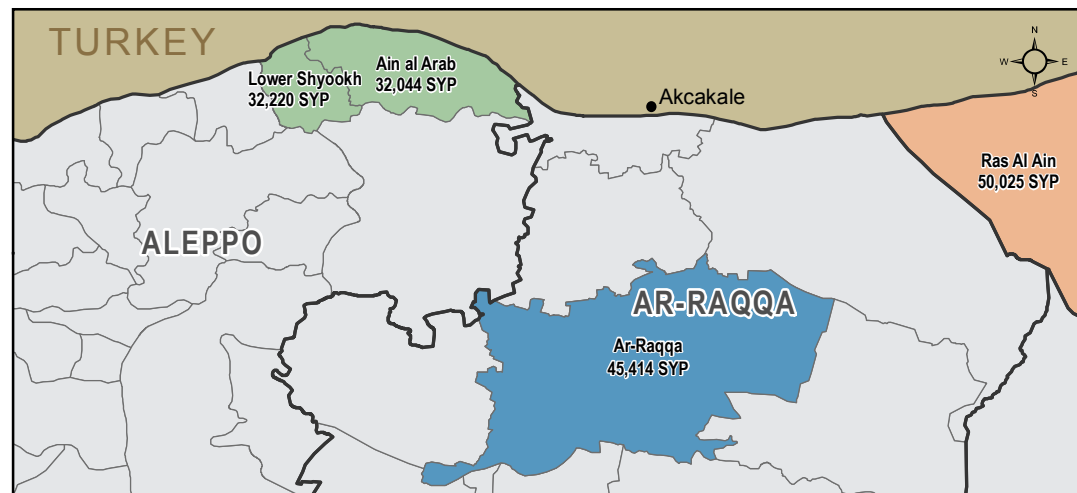
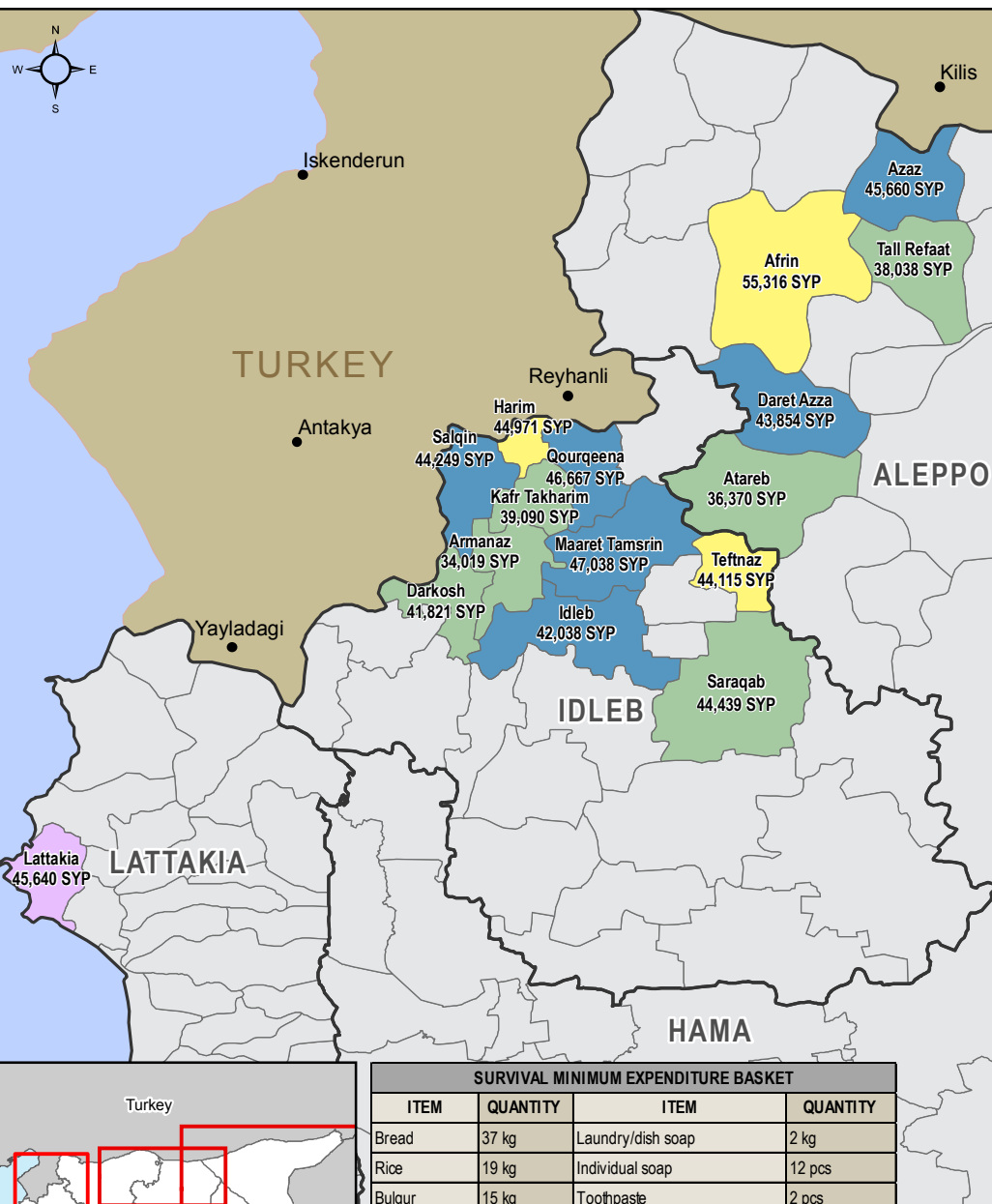
FUEL



How to read a box plot

Box plots provide a variety of data to aid in understanding the distribution of the data set. Prices are in SYP unless otherwise marked.





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 Low Cost
- SMEB Excluding Other Items
- SMEB Excluding Chicken
- SMEB Excluding Kerosene
- SMEB Excluding Water
- Complete SMEB High Cost
- Subdistricts Not Surveyed

Data sources:
Boundaries - OCHA COD
Market monitoring data - REACH, CBR-TWG
Coordinate System: GCS WGS 1984
File: 20160130_REACH_SYR_SMEB_A4_V1
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.