

Northern Syria Market Monitoring Exercise

July 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 to support 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 guide the implementation of humanitarian cash and voucher programmes within those markets.

METHODOLOGY

Between 18 and 25 July 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 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 within each market had to be housed in permanent structures and had to sell certain items to be eligible for inclusion.

Enumerators were trained on methodology and tools by REACH and CBR-TWG members. 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, ar-Raqqa, and Deir ez-Zor, data collection was conducted directly through key informants such as shop owners, suppliers, and consumers.

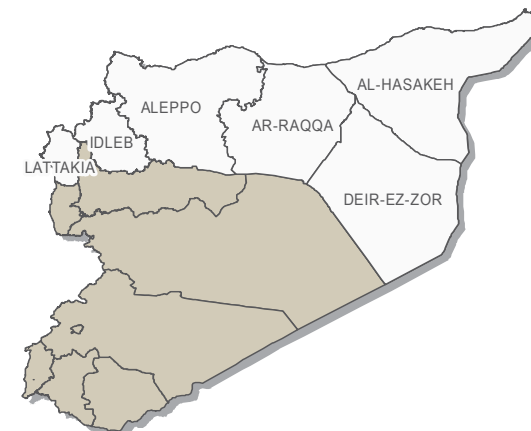
Following data collection, REACH compiled and cleaned all partners' data, normalising prices and cross-checking outliers. The cleaned data was then analysed by commodity and by subdistrict. Prices were divided into quartiles and boxplots were created to help CBR-TWG members understand the distribution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

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.

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. CBR-TWG members have sought to overcome these issues by harmonising procedures and data collection tools to ensure that the data uploaded are as accurate as possible.

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
	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 (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.

July 2016: NORTHERN SYRIA CONTEXT

During July, the humanitarian situation in northern Syria deteriorated in many areas, most particularly Aleppo City and Idleb City. The city of Aleppo was particularly affected, as the Syrian Army advanced on the city and gained control of strategic areas, with widespread, indiscriminate bombing. Humanitarian corridors in and out of Aleppo remained closed, and an estimated 300 thousand civilians remain trapped in Eastern Aleppo as the city remains under siege. More than 200,000 individuals currently in Eastern Aleppo City reportedly seek to leave, pending talks between Aleppo provincial government and INGOs.

During July, conflict intensified in Idleb City, with bombing reportedly affecting hospitals, schools and other areas populated by civilians. No data collection was possible due to ongoing insecurity, and therefore there is no coverage of market conditions for Idleb city.

COMMODITY PRICE CHANGES

In July, the median informal sell rate for US Dollars was 495 SYP/USD. This rate has remained relatively stable since June, when the rate was 491 SYP/USD. This recent stabilisation follows a sharp period of deflation from May to June. The Turkish Lira to SYP also remained largely the same from June to July. There was only a 1% decrease in the median sell rate, from 168 SYP/TRY in June to 166 SYP/TRY in July. This shows a relatively level rate, compared to the 20% decrease in May.

The month of July showed a number of fluctuations in food prices from the previous month, with prices

MEDIAN EXCHANGE RATES

495 SYP/USD
166 SYP/TRY

MAIN PRICE CHANGES

LAUNDRY SOAP, TOMATOES, POTATOES, FUEL

for some foods dropping significantly, while others registered a small increase. In particular, the price of tomatoes saw the largest decrease, with a substantial drop of 58% from June to July. The median price for 1kg of tomatoes was 100 SYP (.20 USD) in July, down from 238 SYP (.48 USD) in June and 301 SYP in May. The price of red lentils also decreased from 600 SYP (1.22 USD) in June to 550 SYP (1.11 USD) in July. This represents an 8% decrease from June. Potatoes decreased 23% from 195 SYP (.40 USD) to 150 SYP (.30 USD).

Other food items increased in price from June to July. The price of cucumbers rose 20% since June, from 125 SYP (.25 USD) to 150 SYP (.3 USD). This rise reverses a trend of decreasing prices from May to June. The prices for chicken and eggs also rose slightly from June. Chicken increased from 1000 SYP to 1100 SYP and eggs increased from 1000 SYP to 1050 SYP.

The prices for other products, including ghee, flour, salt, and rice remained stable from June to July. Bread remained at 100 SYP (.20 USD) for both June and July. Bulger and vegetable oil also had little change, decreasing 3% and 2% respectively.

Regarding non-food items, several products saw large price increases in July. The largest increase in price was individual soap, which doubled in price from 75 SYP in June to 150 SYP (.31 USD) in July. Dish soap rose 20% from June, from 250 SYP to 300 SYP. Laundry soap also increased, rising 15% from 500 SYP (1.02 USD) in June to 575 SYP (1.17 USD). This continues an increase in price for laundry soap, which is up 125 SYP from May. The prices for sanitary pads and toothpaste remained the same from June to July, at 250 SYP (.51 USD) and 200 SYP (.41 USD) respectively.

MAIN SHORTAGES

KEROSENE, WATER, CHICKEN

After falling in June, fuel prices rose in July. Manually refined diesel saw the largest increase of any fuel type in July, rising 196% from 55 SYP/L (.11 USD/L) in June to 163 SYP/L (.26 USD/L) in July. Government diesel cost a median of 175 SYP/L in July, up from 130 SYP/L (.20 USD/L) in June. Government refined petrol increased in price from 400 SYP/L (.63 USD) per litre to 450 SYP/L (.71 USD) in July. A 13% increase, this continues the 7% increase from May to June. Manually refined petrol also rose 18% from June, costing 118 SYP/L (.19 USD/L) in July. The price of Kerosene increased 50%, rising from 132 SYP/L (.21 USD/L) in June to 200 SYP/L (.31 USD/L). This rise negates a 34% drop in price from May to June.

Gasoline was the only fuel type to decrease in price, costing a median of 275 SYP/L (.43 USD/L) in July compared to 294/L SYP (.46 USD/L) in June. However, it is important to note that there were large fluctuations between markets with some reporting prices as high as 975 SYP/L.

The median price to deliver 1 litre of water via private trucking services was .511 SYP in July. This is 6% lower than the previous month, when the median delivery cost was .54 SYP. For a standard 150x200cm winter blanket with a minimum thickness of 5mm in July, the price was 3,200 SYP. This is the same price as June, and remains at a three month low compared to 3,750 SYP in May and 4,500 SYP in April.

AVAILABILITY

Availability of SMEB commodities in general has continued to improve during the month of July, though access problems still remain. Compared to June, when SMEB shortages were generally concentrated around Aleppo, commodity shortages

in July were more geographically widespread.

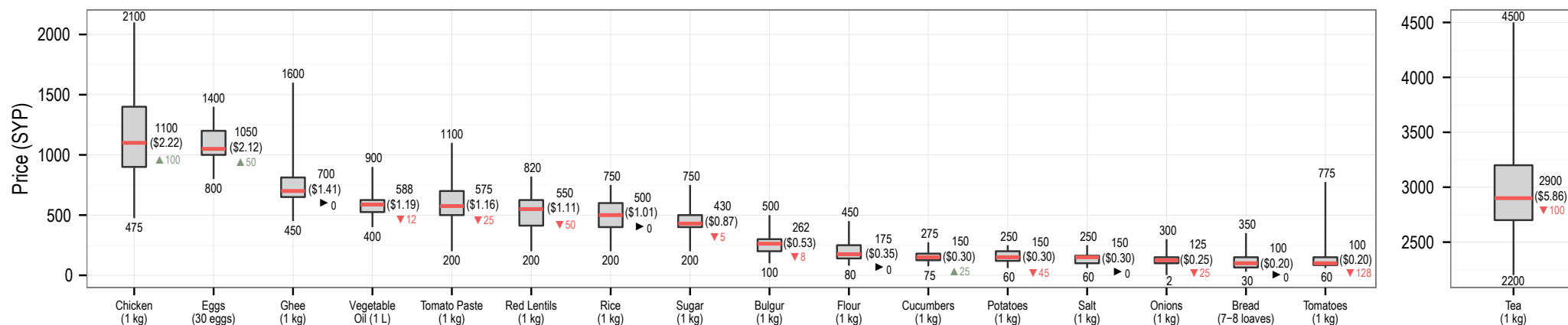
Access to Kerosene improved slightly in July, though shortages are still widespread with five subdistricts reporting lack of kerosene (Suluk in Ar-Raqqa, Lower Shyookh and Atareb in Aleppo, Lattakia city, and Kafr Tak in Lrbid), compared to six subdistricts in June. Dish soap was widely unavailable in Hasakeh, with four subdistricts reporting shortages (Amuda, Qahtaniyyeh, Jawadiyah, and Al-Malikeyyeh). Access to chicken also improved in July, with four subdistricts reporting a lack of access compared to six in June. The four subdistricts (Ras al Ain, Saluk, Lower Shyookh, and Tell Abaid) were spread geographically across three governorates, Hasekeh, Aleppo, and Raqqa. There was no access to eggs in four subdistricts (Suluk, Lower Shyookh, Ain al Arab, and Tell Abaid). This represents a slight decrease in availability compared to June, when only three subdistricts had a shortage of eggs. Bread was unavailable in four subdistricts spread across four governorates, reported in Qourqeena, Yarobiyah, Salqin, and Tell Abiad.

SMEBs

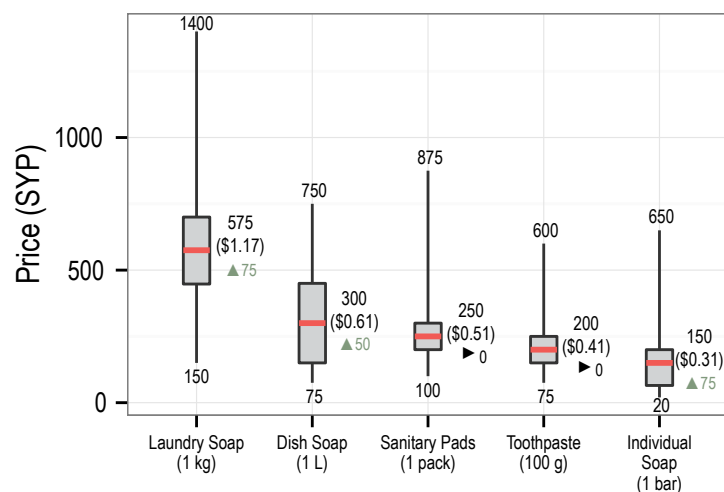
The value of a Survival Minimum Expenditure Basket (SMEB) is calculated for each assessed subdistrict by calculating the median prices of all SMEB commodities in that subdistrict and multiplying these medians by the number of units that an average northern Syrian household must purchase in a month. Twelve subdistricts had complete SMEBs in July. Of the 12 subdistricts with complete SMEB access, six are located in Idleb governorate Two are located in Al Hasakeh, one in Ar-Raqqa and one in Deir-ez-Zour.

Maaret Tamsrin in Idleb had the lowest price for a complete SMEB, costing 50,763 SYP (103 USD) in July. This shows an 8% decrease from June. Conversely, the most expensive complete SMEB was nearly twice this amount, costing 96,456 SYP (195 USD) in Deir-ez-Zor city. This is compared to June, where the most expensive SMEB was 67,244 SYP (137 USD), representing a 43% increase.

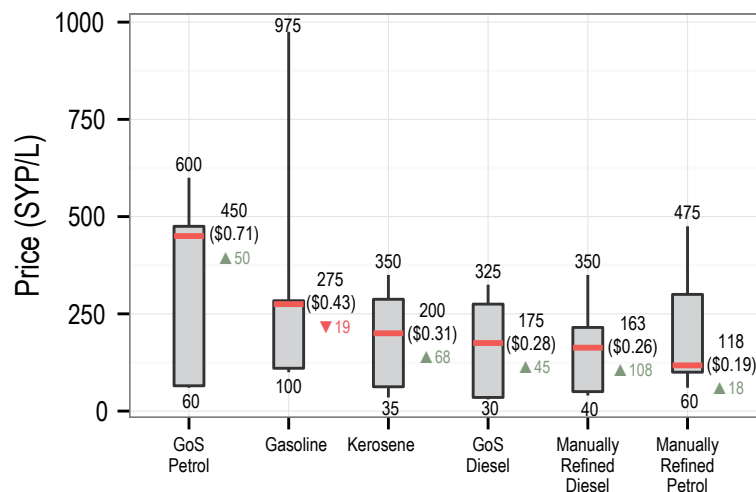
FOOD ITEMS



NON-FOOD ITEMS

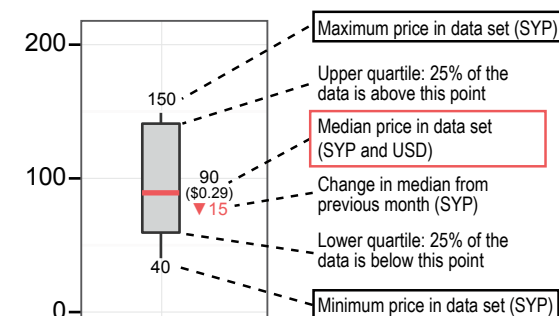


FUEL



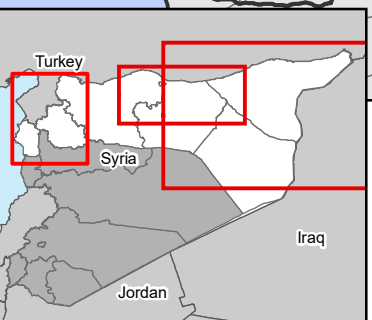
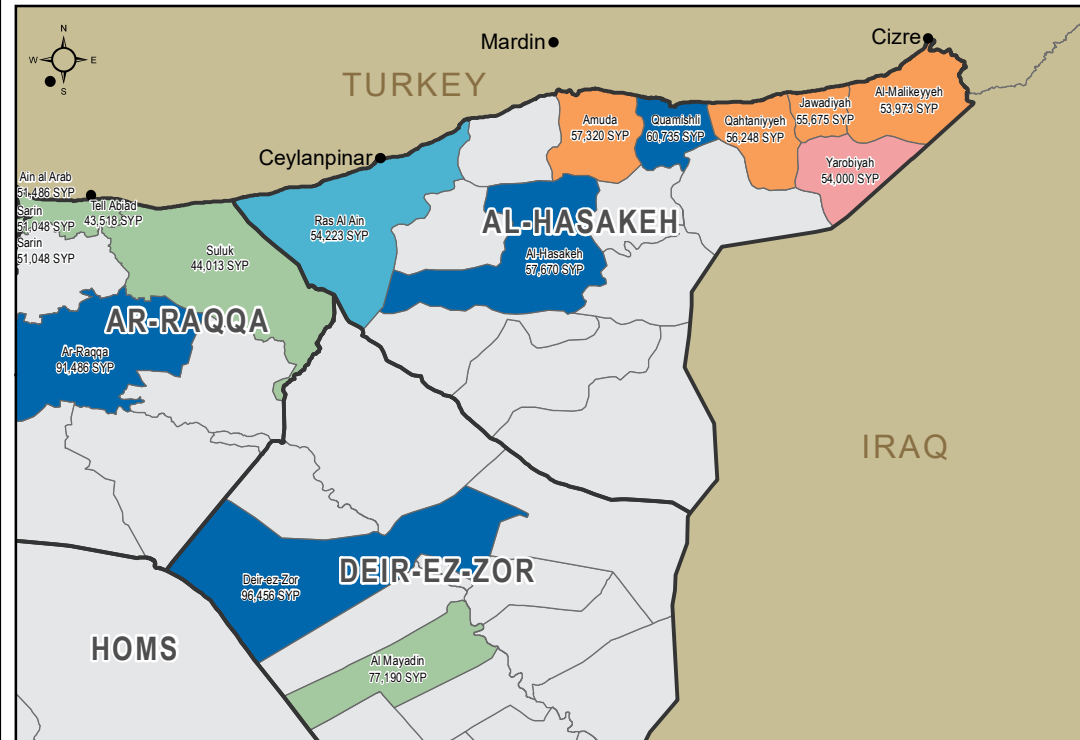
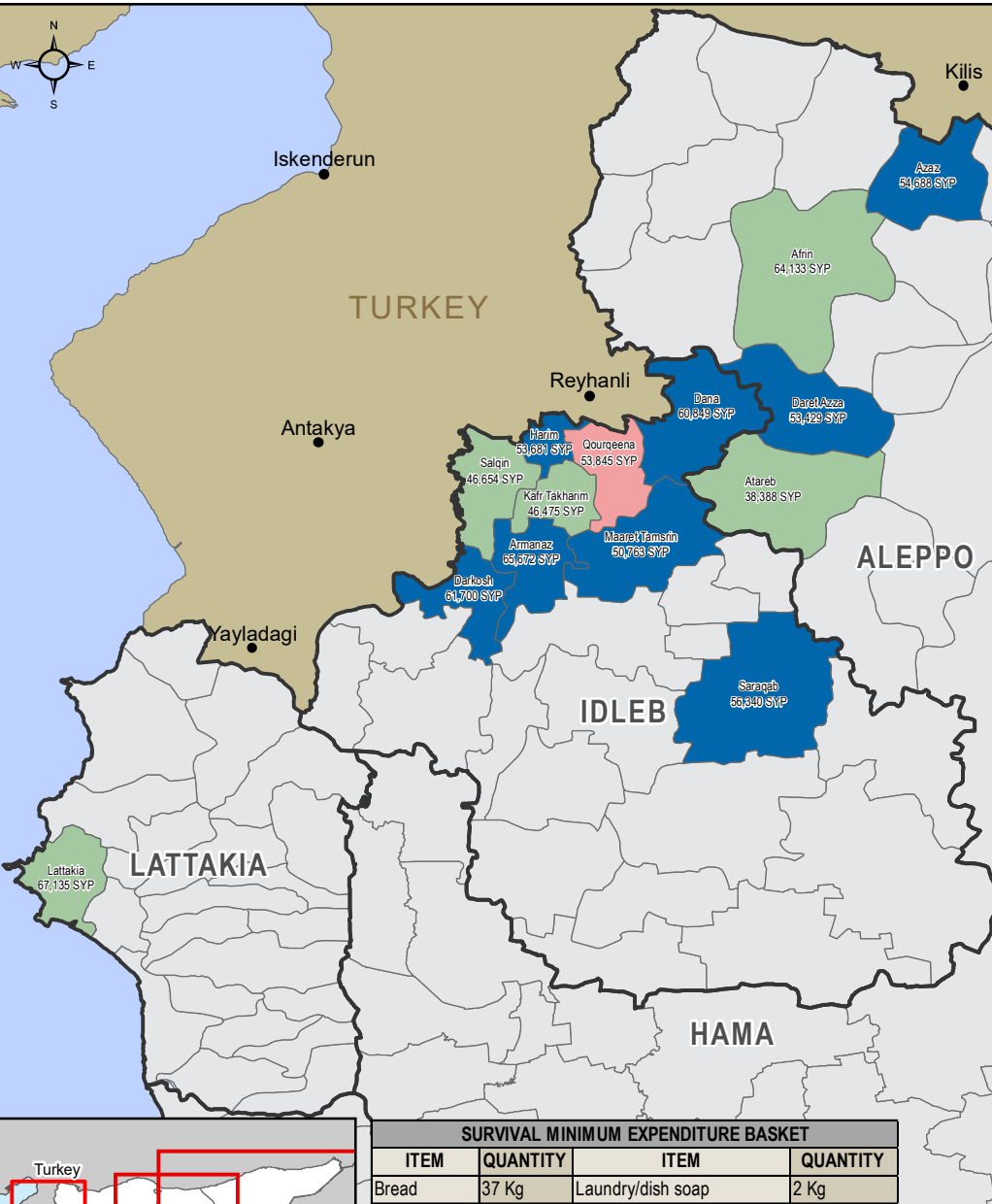
How to read a box plot

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



Syria - Survival Minimum Expenditure Basket (SMEB) Cost

Market Monitoring - July 2016



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

- SMEB Complete
- SMEB Excluding Chicken
- SMEB Incomplete
- SMEB Excluding Dish Soap
- SMEB Excluding Bread

Data sources:
Boundaries - OCHA COD, USDS HIU
Market monitoring data - REACH, CBR-TWG
Coordinate System: GCS WGS 1984
File: 20160803_REACH_SYR_SMEB_A4
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.