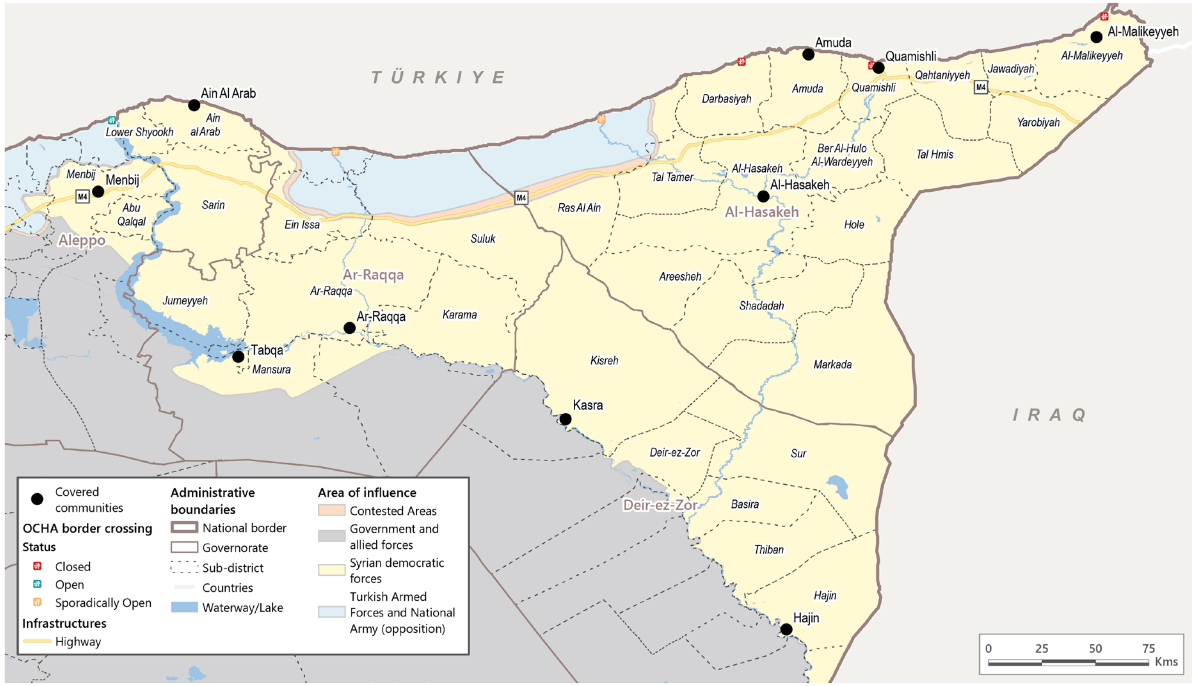
Northeast Syria (NES) fuel price and availability rapid assessment

19th of November 2024 | Northeast Syria

Context & Rationale

Northeast Syria (NES) experienced a significant escalation in conflict activity beginning October 23rd, including 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, and significant damage has been reported 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 and communes[5] remained stable between the last two rounds of data collection** (04/11/2024 and 11/11/2024 respectively), **while median prices in the black market considerably increased, for all products assessed.** The highest recorded weekly price increase was 18% for high quality petrol and 10% for 7Kg LPG cylinders.
- **The black market also experienced the largest median price increases compared to price levels recorded in September 2024**, both at the community and NES-wide levels. On 11/11/2024, black market median prices were 52%, 23%, and 13% higher for kerosene, high-quality diesel, and high-quality petrol, respectively, compared to the September 2024 NES-wide median prices.
- **While the black market has maintained stable availability of oil-related products, the availability in formal markets appears to be declining.** A growing proportion of vendors, across successive weekly data collection rounds, have reported on the day of data collection complete stockouts of products that were typically available before October 23.
- **An increasing proportion of formal vendors across the three weekly data collection rounds reported experiencing stockouts of products in the seven days preceding each round.** By the latest round, 100% of formal vendors selling subsidized petrol, unsubsidized petrol, unsubsidized diesel, and 7kg LPG cylinders reported stockouts. While the average duration of stockouts at fuel stations has remained relatively consistent, ranging from 3.5 to 5.5 days across different products, the average duration of stockouts for LPG cylinders in communes has steadily risen, peaking at 6 days during the latest data collection round (11/11/2024).

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Table 1: Proportion of vendors reporting availability of assessed products on the day of data collection as well as experiencing stockouts of at least one day in the week prior to data collection (Round 3 - 11/11/2024), among those who typically sold the product before October 23rd, disaggregated by product

Vendor type	Product type	Availability of products on the day of data collection			Stockouts during the week prior to data collection			Average duration of stockouts (days)		
		R1	R2	R3	R1	R2	R3	R1	R2	R3
Fuel stations	Unsubsidised petrol	8/19	6/18	6/18	15/19	17/18	18/18	4.5	5.5	5.1
	Subsidised petrol	7/17	10/19	7/18	14/17	13/19	18/18	4.6	4.9	4.5
	Unsubsidised diesel	14/21	12/17	9/17	13/21	12/17	17/17	3.9	4.4	3.4
	Subsidised diesel	3/7	7/8	6/8	5/7	4/8	5/8	4.9	4.7	3.8
	Imported petrol	5/5	5/5	5/5	0/5	0/5	1/5	0	0	1
Black market	High quality diesel	32/35	33/34	32/35	12/35	9/34	10/35	2	1.6	3
	High quality petrol	33/33	35/36	35/36	6/33	2/36	3/36	4.3	3	1.5
	Kerosene	19/19	20/20	19/20	1/19	1/20	2/20	1	1	2
	LPG cylinders (7kg)	23/30	27/32	21/33	17/30	23/32	25/33	4.8	4.3	4.4
Communes	LPG cylinders (7kg)	22/39	10/39	6/35	36/39	37/39	35/35	5.6	5.6	6

Table 1 indicates that, since October 23, formal fuel markets in Northeast Syria (NES), encompassing fuel stations and communes, have experienced a significant decline in the availability of oil-derived products. In contrast, the black market has remained relatively stable in terms of product availability. Across three rounds of data collection, vendors from both fuel stations and communes consistently reported reduced availability of nearly all products previously sold before October 23, with the exception of imported fuel. In particular, communes have shown a sustained decrease in product availability since October 23. Additionally, an increasing proportion of formal market vendors reported stockouts of previously available products during the seven days preceding data collection. The average duration of these stockouts ranged from 3.4 days for unsubsidized diesel in fuel stations to 6 days for LPG cylinders in communes.

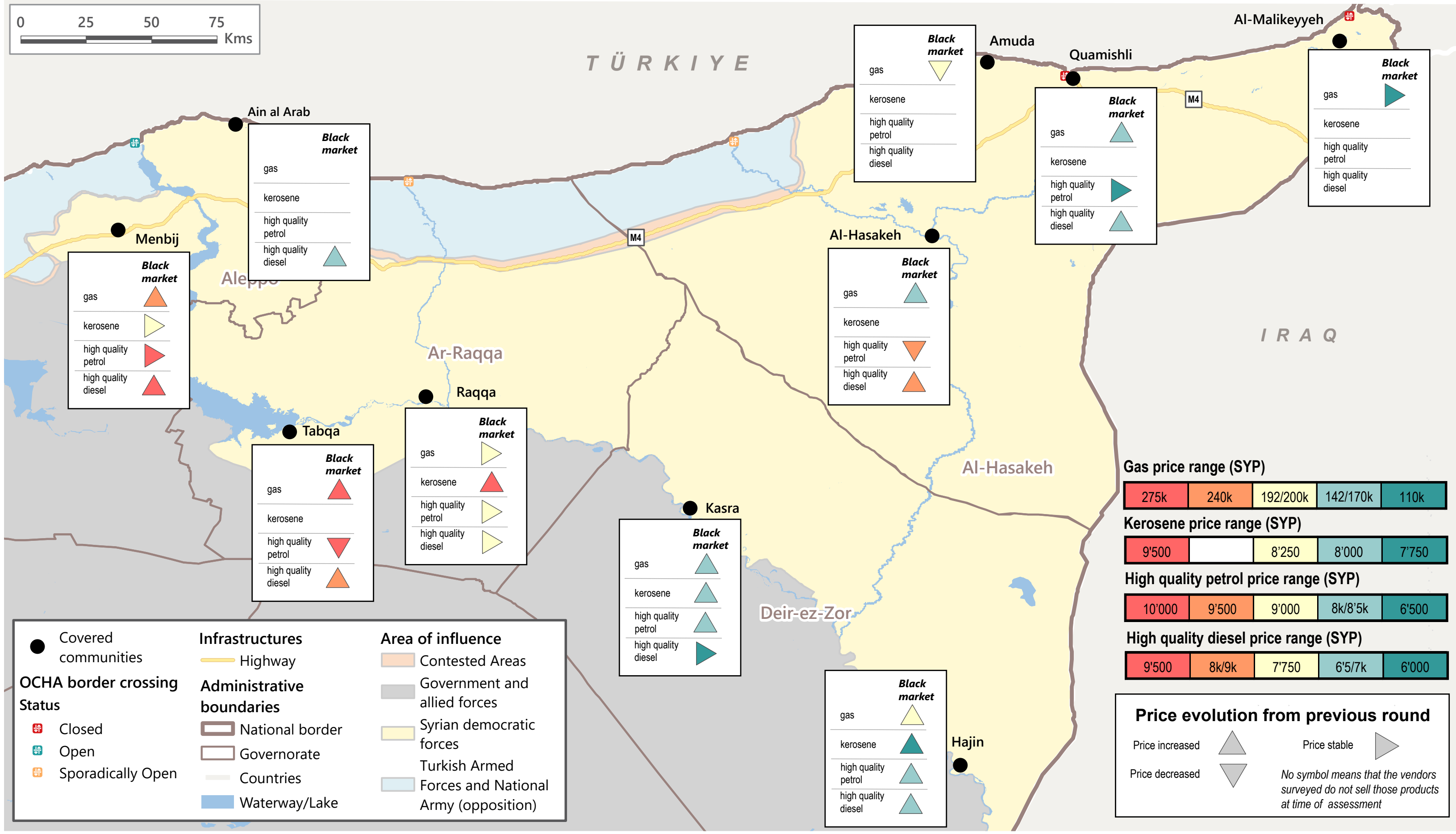
The decline in product availability within formal markets is likely driven by the escalated security situation in NES, which has disrupted the extraction, production, and distribution of oil-derived products, limiting the ability of fuel stations and communes to maintain adequate stock levels. Additionally, the pricing disparity between formal markets and the black market likely plays a critical role; lower prices in formal markets make them more susceptible to shortages as demand increases and supply struggles to keep pace (Table 2, Table 3).

Table 2: Community level and NES-wide median price[7] (SYP) changes on the black market compared to the levels registered in September 2024 by the Joint Market Monitoring Initiative (JMMI), disaggregated by product

Product type	Price	Ain Al Arab	Menbij	Tabaqa	Ar-Raqqa	Kasra	Qua-mishli	Al-Ha-sakeh	Hajin	Al-Ma-likeyyeh	Maabada	NES-wide[6]
High quality diesel	JMMI (Sep 2024)	6000	6000	7000	6000	NA	6000	6000	4500	5000	4500	6000
	11/11/2024	6500	9500	9000	7750	6000	7000	8000	6500	NA	NA	7375
	Change (%)	8%	58%	29%	29%	NA	17%	33%	44%	NA	NA	**23%**
High quality petrol	JMMI (Sep 2024)	5450	8250	9000	8000	NA	8750	8750	5500	7000	5450	8000
	11/11/2024	NA	10000	10000	9000	8000	6500	9500	8250	NA	NA	9000
	Change (%)	NA	21%	11%	13%	NA	-26%	9%	50%	NA	NA	**13%**
Kerosene	JMMI (Sep 2024)	4500	7750	NA	7500	NA	7250	7250	4700	6000	4500	5350
	11/11/2024	NA	8250	NA	9500	8000	NA	NA	7750	NA	NA	8125
	Change (%)	NA	6%	NA	27%	NA	NA	NA	65%	NA	NA	**52%**

These dynamics may have significant implications for both households and critical sectors. The reliance on black market fuel, which often comes at a higher cost and variable quality, places additional financial strain on communities. Furthermore, reduced availability of key products, such as LPG and diesel, could impede access to energy for cooking, heating, and transportation, while also disrupting agricultural and healthcare operations in the longer term. The combined effect of these shortages risks exacerbating economic vulnerabilities and increasing reliance on informal and potentially exploitative fuel sources, as suggested by the increasing prices on the black market (Table 2, Table 3).

Map 2: Median price ranges (SYP) and market price trends (between the 04/11/2024 and 11/11/2024) recorded on the black market, by product and community assessed



Map 2 highlights that assessed communities in the western part of NES, specifically in Aleppo and Raqqa Governorates, including Raqqa, Tabqa, and Menbij, exhibit a higher concentration of the highest recorded price ranges for all assessed products compared to other communities and governorates.

Additionally, Map 2 indicates that assessed communities in Deir-ez-Zor Governorate have a higher concentration of products which experienced weekly price increases. Notably, while the two assessed communities in Deir-ez-Zor, Kasra and Hajin, display lower overall price ranges for all products, they reported weekly price increases across nearly all products, surpassing the trends observed in other communities across NES where information was available.

These comparative statements are based on cases where the same type of information was available across different communities. The lack of information for certain products in some communities does not imply the complete unavailability of these products in those communities. Instead, it reflects that the specific product was not available at the assessed vendors in the surveyed communities. Given the purposive sampling approach and the highly limited number of surveys conducted, the findings cannot be generalized to the community level but should instead be interpreted as indicative of the assessed vendors' conditions.

Table 3: Community-level and NES-wide median prices (SYP) recorded in round 3 (11/11/2024) and percentage changes compared to round 2 (04/11/2024), disaggregated by product

Vendor type	Product type	Value	Ain Al Arab	Al-Ha-sakeh	Al-Ma-likeyyeh	Amuda	Ar-Raqqa	Hajin	Kasra	Maabada	Menbij	Quamishli	Tabaqa	NES-wide
Black market	High quality diesel	Price (SYP)	6500	8000	NA	NA	7750	6500	6000	NA	9500	7000	9000	**7375**
		Weeky change (%)	8%	33%	NA	NA	0%	25%	0%	NA	19%	8%	13%	**18%**
	High quality petrol	Price (SYP)	NA	9500	NA	NA	9000	8250	8000	NA	10000	6500	10000	**9000**
		Weeky change (%)	NA	-5%	NA	NA	0%	18%	3%	NA	0%	0%	-17%	**0%**
	Kerosene	Price (SYP)	NA	NA	NA	NA	9500	7750	8000	NA	8250	NA	NA	**8125**
		Weeky change (%)	NA	NA	NA	NA	3%	29%	7%	NA	0%	NA	NA	**3%**
	LPG cylinders (7kg)price	Price (SYP)	NA	170000	110000	200000	200000	192500	142500	NA	240000	165000	275000	**192500**
		Weeky change (%)	NA	1%	0%	-5%	0%	10%	0%	NA	28%	3%	22%	**10%**
Communes	LPG cylinders (7kg)	Price (SYP)	NA	NA	NA	NA	120000	125000	NA	NA	NA	115000	NA	**120000**
		Weeky change (%)	NA	NA	NA	NA	0%	NA	NA	NA	NA	5%	NA	**2%**
Fuel stations	Subsidised diesel	Price (SYP)	NA	NA	525	525	NA	NA	NA	525	NA	525	NA	**525**
		Weeky change (%)	NA	NA	0%	0%	NA	NA	NA	0%	NA	0%	NA	**0%**
	Unsubsidised diesel	Price (SYP)	4700	NA	4700	5350	4700	NA	NA	NA	4700	4700	NA	**4700**
		Weeky change (%)	0%	NA	NA	14%	0%	NA	NA	NA	0%	0%	NA	**0%**
	Subsidised petrol	Price (SYP)	425	NA	425	NA	425	NA	NA	NA	NA	425	425	**425**
		Weeky change (%)	0%	NA	0%	NA	0%	NA	NA	NA	NA	0%	NA	**0%**
	Unsubsidised petrol	Price (SYP)	4700	NA	NA	4700	4700	NA	NA	NA	NA	4700	NA	**4700**
		Weeky change (%)	NA	NA	NA	0%	0%	NA	NA	NA	NA	0%	NA	**0%**
	Imported petrol	Price (SYP)	NA	15660	NA	NA	NA	NA	NA	NA	16000	15660	NA	**15660**
		Weeky change (%)	NA	0%	NA	NA	NA	NA	NA	NA	0%	0%	NA	**0%**

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 11 communities across 3 Governorates: Ain al Arab, Al-Hasakeh, Al-Malikeyyeh, Al-Thawrah, Amuda, Ar-Raqqa, Hajin, Kasra, Menbij, Maabada and Quamishli. Data presented includes three rounds of data collection, conducted on 30/10/2024 with 147 surveys, 4/11/2024 with 152 surveys and 11/11/2024 with 148 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 3 (11/11/2024)

Community	Black market - Fuel	Black market - Gas	Communes	Fuel stations	Total
Ain Al Arab	4	1	4	4	13
Al-Hasakeh	6	4	4	4	18
Al-Malikeyyeh	NA	3	NA	4	7
Amuda	1	1	4	4	10
Ar-Raqqa	8	4	4	4	20
Hajin	6	4	3	NA	13
Kasra	6	2	4	NA	12
Maabada	NA	NA	NA	3	3
Menbij	4	4	4	4	16
Quamishli	6	6	4	4	20
Tabaqa	4	4	4	4	16
Grand Total	45	33	35	35	148

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 - Emergency Response - Northeast Syria"
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).Amongst other roles, communes distribute essential, subsidized goods at affordable prices.
6 It is important to note that the number of communities assessed for the JMMI is significantly higher than the number of communities evaluated in this assessment. This difference impacts the representativeness of the NES-wide fuel median prices, affecting the methodological accuracy and the relevance of comparisons between NES-wide median prices.
7 The NES-wide median price was determined by taking a simple median of the median prices calculated at the community level.

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