

Northern Syria Market Monitoring Exercise

February 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 11 and 21 February 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, Solidarités International, and REACH) contributed data from 30 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

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. This was the case in the divided cities of al-Hasakeh, Qamishli and Deir ez-Zor, where some neighbourhoods could not be surveyed. In addition, several partners scaled back their coverage due to the dangers of rapidly shifting frontlines.

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 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.

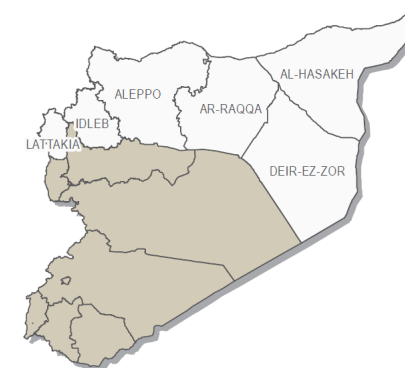
For methodological reasons, restocking data from al-Hasakeh governorate could not be analysed alongside data from other governorates and had to be excluded. Too few prices were collected from Sarmin to warrant separate analysis.

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 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, the average cost of an SMEB in each subdistrict was calculated and mapped by REACH.

structures and had to sell certain items to be eligible for inclusion.

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.

FEBRUARY 2016: NORTHERN SYRIA CONTEXT

Throughout February, an escalation of conflict caused significant displacement from villages north of Aleppo city. Large numbers of households fled northwards to camps and host communities in A'zaz subdistrict, with a significant number eventually traveling south through Afrin to Daret Azza and subdistricts in Idlib along the Turkish border.

At the same time, the spread of conflict activity in rural northern Aleppo cut the main supply route from the northern Turkish border to Aleppo city and surrounding subdistricts. While it was possible to assess some of the subdistricts in Aleppo governorate affected by displacement and potential supply chain disruptions, it was not possible to assess Aleppo city itself. Data collected by REACH in eastern Aleppo city through key informants on February 13-14 found that bulgur, bread, chicken and flour has significantly increased in price.

Despite a number of changes due to escalation of the conflict and numerous security challenges, partners were largely able to maintain previous levels of coverage. As a result, only two of the subdistricts assessed in January, Tall Refaat and Karf Takharim, were inaccessible in February. Large-scale displacement from Tall Refaat subdistrict resulted in markets that were no longer operational or possible to assess, while widespread insecurity in Kafr Takharim in Idlib forced partners to scale back coverage. As in previous months, it was not possible to restore coverage to subdistricts in southern Idlib and northern Hama governorates that been removed from the Market Monitoring Exercise, as the communities in these areas

**MEDIAN EXCHANGE RATES
FEBRUARY 2016**
436 SYP/USD
148 SYP/TRY

MAIN PRICE CHANGES

**FRESH VEGETABLES,
TEA, CHICKEN, FUEL**

still face widespread insecurity. Despite these setbacks, partners were able to assess Suluk in ar-Raqqa for the first time

COMMODITY PRICE CHANGES

There was little variation between exchange rates across governorates and areas of control. The median informal US dollar sell rate in the subdistricts assessed in February was 436 SYP/USD, up from 398 SYP/USD from January, a rise of approximately 9.5%, with local rates ranging from 432 SYP/USD to 445 SYP/USD. As for the Turkish lira, the median sell rate was 148 SYP/TRY—as opposed to 131 in January—with a range from 144 to 155 SYP/TRY.

By the time of data collection, conflict and displacement in rural Aleppo did not appear to have had a sustained effect on markets in the most affected subdistricts. Relative stability in terms of availability and prices were noted despite the fact that assessments conducted shortly after displacement found some shortages and price spikes for some commodities. Markets in subdistricts to the north, south, and west of Aleppo city, which have been the most affected by influxes of IDPs, largely remained stable in comparison with January. The cost of the complete SMEB in A'zaz increased by 9%, while an increase of only 7% was measured in Daret Azza. Both of these subdistricts are likely the most affected by recent displacement, but in both, price increases were less than inflation against the U.S. dollar.

Across all subdistricts monitored, price increases for individual food commodities and NFIs tended to keep pace with or fall behind rates of inflation of the

MAIN SHORTAGES

**KEROSENE, WATER, SUGAR,
BREAD**

Syrian pound, and few significant price increases were noted. One exception was chicken, which rose from 712 SYP/kg (1.79 USD) in January to 812 SYP/kg (1.86 USD) in February. Median prices for fuels, including kerosene, petrol, and diesel, fell or remained stable over the same period. The median price to deliver 1 litre of water via private water trucking services was 0.38 SYP, largely stable when compared to January.

In February 2016, the median price of a 150 x 200cm winter blanket with a minimum thickness of 5mm was 3000 SYP, with prices ranging widely from 1500 to 8000 SYP depending on the subdistrict and the types of blankets available in the market.

ISSUES OF AVAILABILITY

Significant shortages of specific food commodities were reported across multiple subdistricts. Sugar was not available in five subdistricts (Qahtaniyah, Ain al-Arab, Lower Shyookh, al-Hasakeh, and Derbasyah); chicken was reported to be unavailable in three subdistricts (Janudiyeh, Hasakeh, and Ras al-Ain) and bread was unavailable in five (Harim, Derbasyah, Tell Abiad, Sukuk, and Jawadiejh). February was the second month in which chicken proved difficult to obtain and the first in which shortages of sugar were reported.

Water from private water trucks was 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.

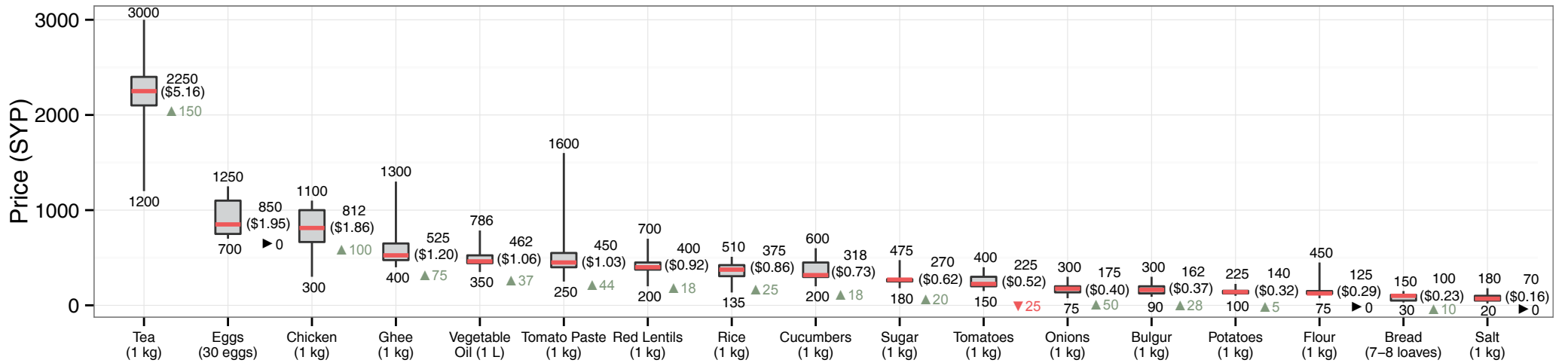
RESTOCKING TIME

Apart from the localised shortages highlighted above, supply chains in most subdistricts appeared on the whole to be functioning, with individual markets retaining adequate stocks of most available items and reporting median restock times of one day for all or most commodities

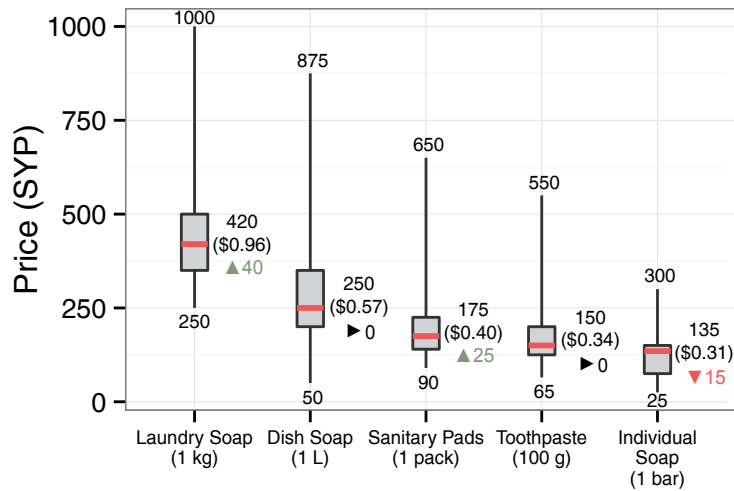
Supply chain problems were largely localized. Restocking times of 2-5 days were commonly reported in Ain al Arab and Qanaya subdistricts along the Turkish border in Aleppo Governorate, while vendors in the ar-Raqqa and Dier ez Zor most commonly reported restocking times of 5-10 days. Restocking times in these subdistricts tended to be consistent across food and NFI commodities.

The first time it was assessed, Suluk subdistrict in ar-Raqqa governorate, appeared to have the greatest difficulties with supply chains and restocking. Vendors reported restocking times of 4-10 days for most food and NFI items, with some vendors reporting restocking times of 15-20 days for lentils, ghee, tomato paste, tea, and different types of soap.

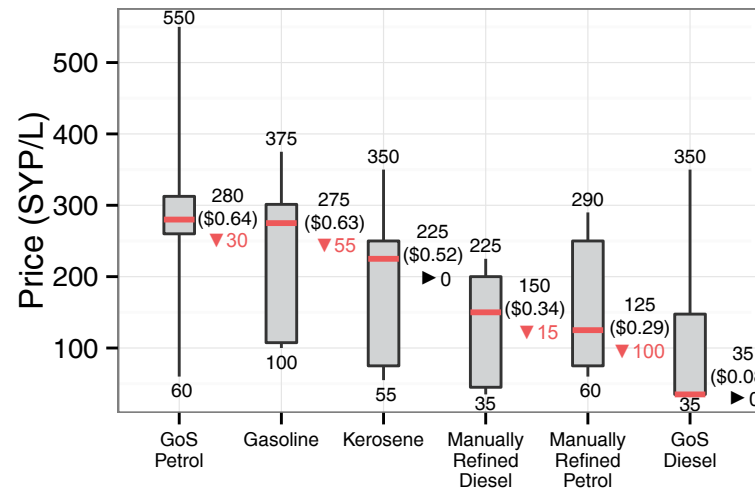
FOOD ITEMS



NON-FOOD ITEMS

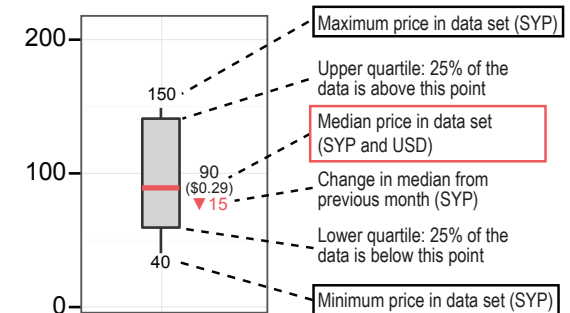


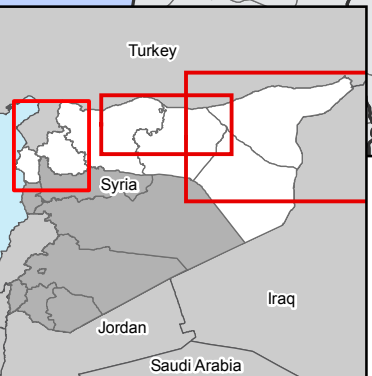
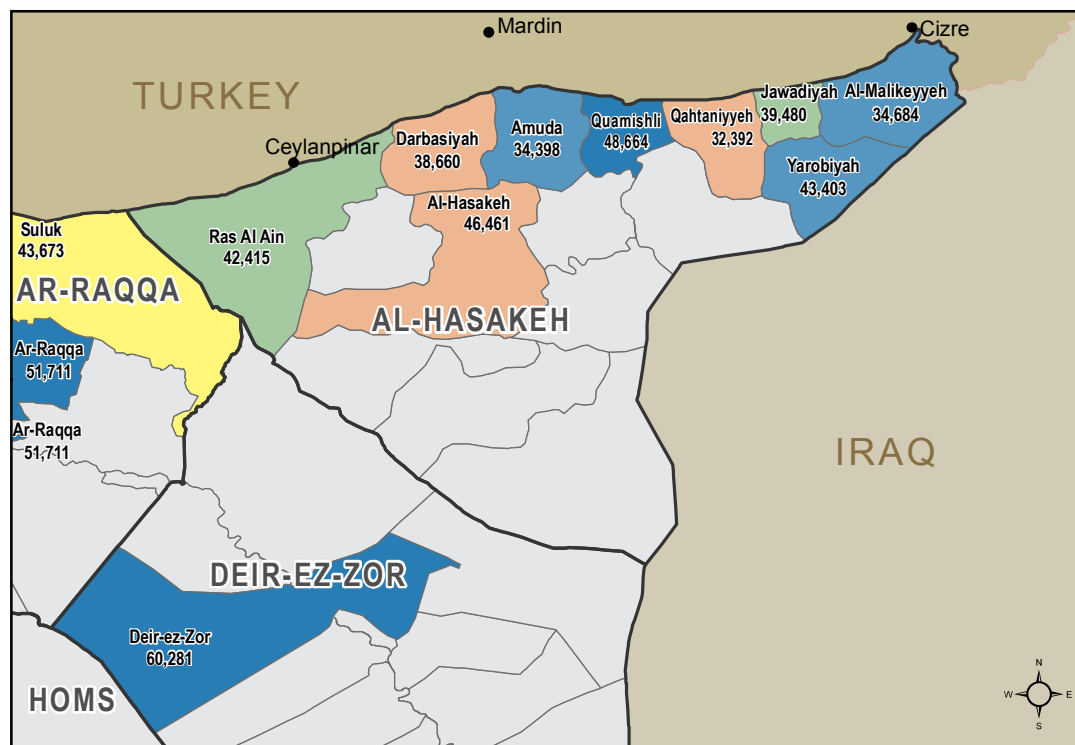
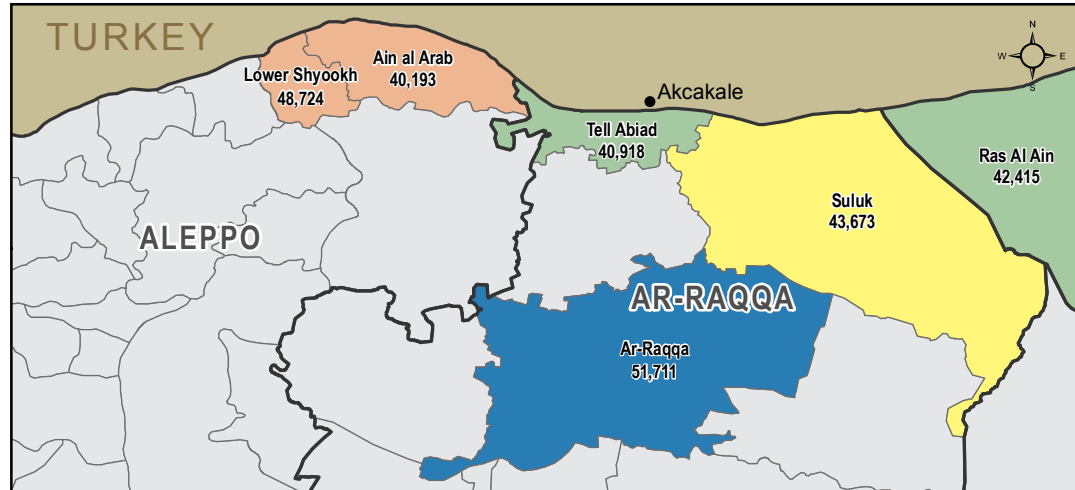
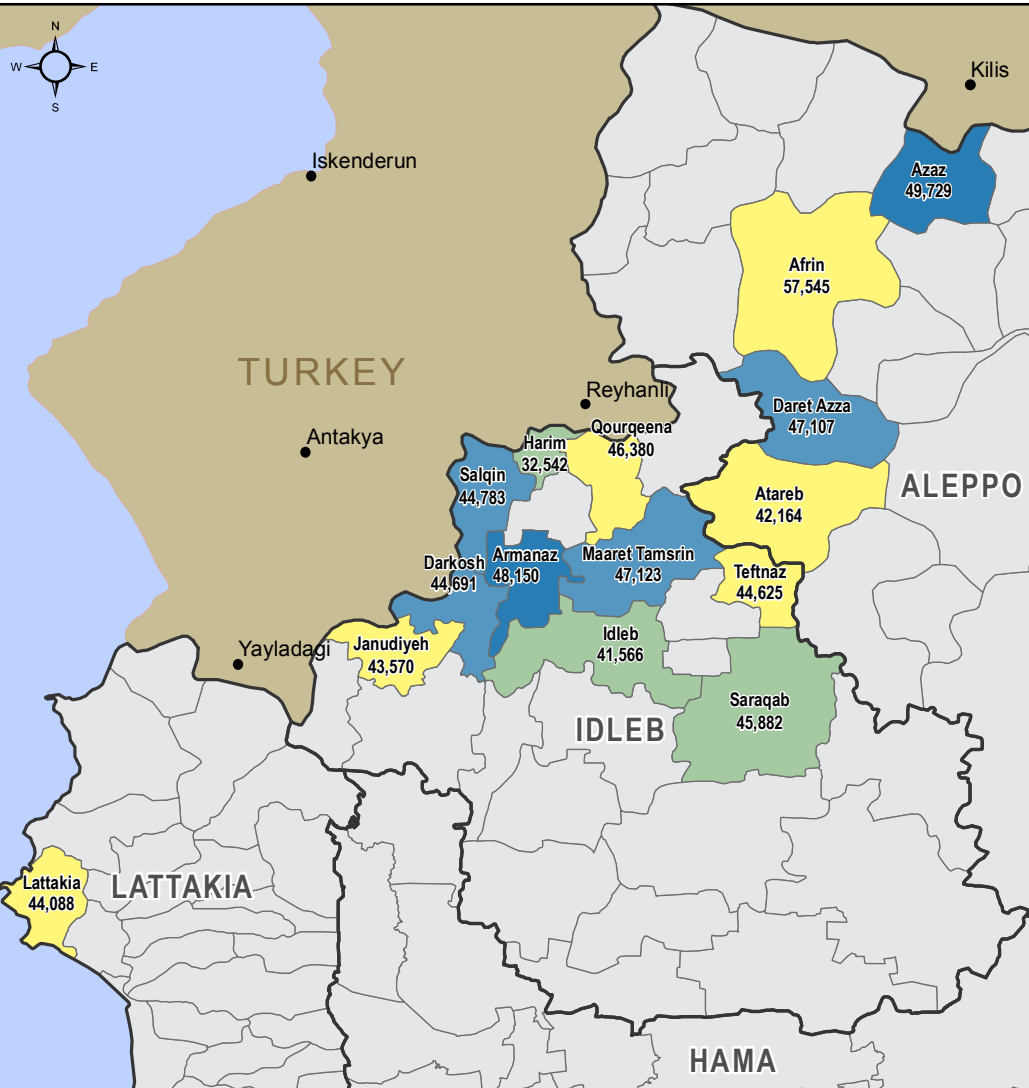
FUEL



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 Water
- SMEB Excluding Sugar
- SMEB Excluding Other Items
- Complete SMEB High Cost
- Subdistricts Not Surveyed

Data sources:
Boundaries - OCHA COD
Market monitoring data - REACH, CBR-TWG

Coordinate System: GCS WGS 1984
File: 20160303_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.