

Northern Syria Market Monitoring Exercise

September 2016

Cash-Based Responses
Technical Working Group

REACH Informing
more effective
humanitarian action

INTRODUCTION

To understand market functionality in northern Syria and the ways in which 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. Monitored 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 represents the minimum culturally adjusted group of items required to support a six-person Syrian household for one month.

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 costs 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 19 and 25 September 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 (Concern, GOAL, IRC, Mercy Corps, People in Need, REACH, Shafak and Solidarités International) contributed data from 30 subdistricts across Lattakia, Idlib, Aleppo, ar-Raqqa 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

CHALLENGES AND LIMITATIONS

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.

CBR-TWG partners closely monitor the security context in the subdistricts where they plan to collect data and are encouraged not to expose their enumerators to undue risk. In some subdistricts,

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 remotely 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.

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 only markets on one side of the frontline could be surveyed. In addition, the security context in the city of Aleppo made it impossible for CBR-TWG partners to operate or collect prices there.

Due to operational constraints, partners were unable to collect data in the cities of ar-Raqqa, Deir-ez-Zor or al-Mayadin. Not enough data was collected in Lower Shyookh subdistrict to make it possible to assemble an SMEB.

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.

SEPTEMBER 2016: NORTHERN SYRIA CONTEXT

During September, the humanitarian situation in eastern Aleppo continued to worsen as the complete reclosure of the Castello and Ramouseh roads cut residents off from commercial goods and humanitarian aid. Stocks have dwindled and prices have skyrocketed in eastern markets, and large portions of the population report that they have no market access at all due to ongoing fighting. WFP and its partners have halved the amount of food they provide in their distributions and estimate that, by early November, food assistance will no longer be available in eastern Aleppo.

To the north of Aleppo, battles over territory near the Turkish border have resulted in displacement from nearby villages in the direction of A'zaz, placing strain on local markets already overburdened by many earlier influxes of IDPs. In Idlib governorate, meanwhile, airstrikes targeting markets and other public infrastructure continued throughout the month.

COMMODITY PRICE CHANGES

September exchange rates for the Syrian pound remained almost identical to those in August, a welcome break after a year of near-constant inflation and volatility. The median informal US dollar sell rate was 540 SYP/USD, less than a 1% increase from the August level of 536 SYP/USD. The highest and lowest sell rates were separated by 28 SYP, the same number as last month, spanning from a low of 522 SYP/USD in Darkosh subdistrict to highs of 550 SYP/USD in Ain al-Arab, Idlib and Dana subdistricts. Meanwhile, the sell rate for the Turkish lira remained at 183 SYP/TRY, the same

**MEDIAN EXCHANGE RATES
SEPTEMBER 2016**
540 SYP/USD
183 SYP/TRY

MAIN PRICE CHANGES

**EGGS, SUGAR, LAUNDRY POWDER,
ALL TYPES OF FUEL**

as in August, with local rates ranging from 175 to 187 SYP/TRY.

For the second month in a row, food prices remained quite steady on the whole. The median prices of eight commodities (vegetable oil, red lentils, rice, bulgur, flour, bread, salt and tea) stayed the same as those observed in August, and in several cases were also the same as those observed in July. Those of several other commodities eased slightly, including chicken, ghee, and especially sugar, the median price of which fell from 600 to 500 SYP (1.12 to 0.93 USD, -16.7%) after a sharp spike in August. The median price of eggs, meanwhile, continued to rise significantly for the third month in a row, jumping from 1200 to 1400 SYP in September (2.24 to 2.59 USD, 16.7%) following a similar jump of 150 SYP in August.

NFIs, by contrast, have been more volatile throughout the summer. The median price of a pack of 10 sanitary pads has remained the same since July, but those of other hygiene commodities have been oscillating back and forth, rising and falling by 25-150 SYP depending on the month. Price rises in September neatly mirrored the price falls observed in August, and vice versa, with the result that median NFI prices in September are nearly the same as those observed in July.

After a decline in August due to a disproportionate number of subsidised fuel prices in the dataset, the September median prices per litre of nearly all types of fuel have increased to levels well above those observed in June and July. That of government-produced petrol, for example, rose from 450 SYP in July to 650 SYP in September (0.71 to 1.20 USD, 44.4%), and that of natural gas rose from 275 SYP in July to 375 SYP in September (0.43 to 0.69

MAIN SHORTAGES

**BREAD,
ALL TYPES OF FUEL**

USD, 36.4%).

The cost of water delivery via private water trucking services continued to rise due to insecurity and increased difficulty of operations across northern Syria. The median price of delivering 1 litre of water was 0.61 SYP in September, up from 0.57 SYP in August and 0.51 SYP in July. Prices ranged from a minimum of 0.34 SYP in Ain al-Arab to 1.50 SYP in Zarzur, Darkosh subdistrict. Meanwhile, the median price of a 150x200 cm winter blanket with a minimum thickness of 5 mm stood at 3,750 SYP (6.94 USD) in late September.

ISSUES OF AVAILABILITY

During September 2016, nearly all SMEB commodities were available in most subdistricts across the assessed area, and market shortages were less prevalent than normal. Kerosene was absent from markets in four subdistricts (Atareb, Ain al-Arab, Sarin and al-Hasakeh), and bread was absent from just three (Armanaz, Darkosh and Tell Abiad). Chicken, eggs and toothpaste were the only other SMEB commodities to be unavailable anywhere, and these were each only missing from one or two markets.

Non-SMEB fuels, meanwhile, remained roughly as difficult to obtain in August. Cylinders of natural gas were unavailable in six subdistricts, and both government-produced and manually refined petrol were unavailable in five. Government diesel was missing from 12 subdistricts out of the 29 assessed, making it, as usual, the monitored commodity with the most widespread shortages.

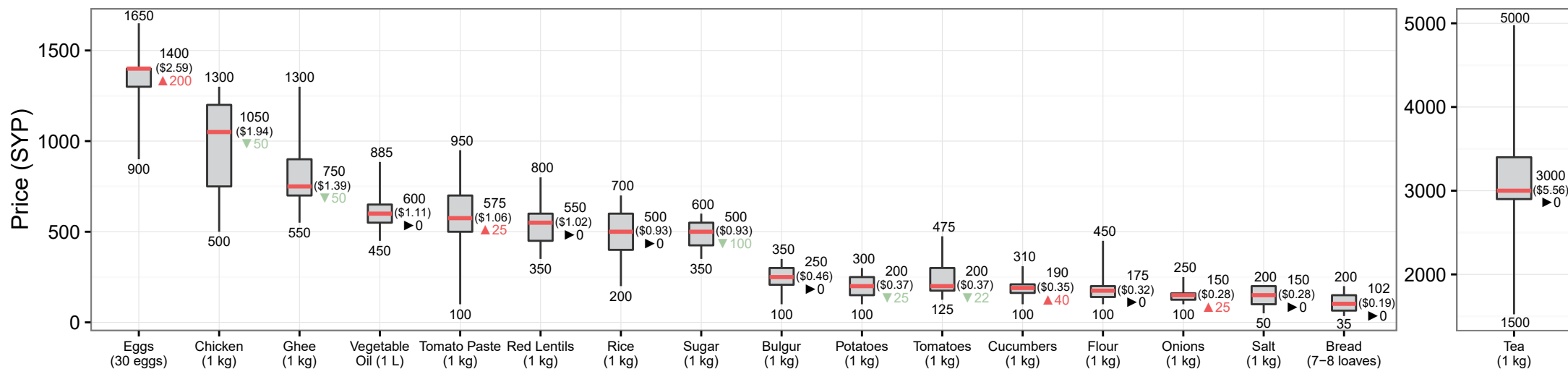
SMEB VALUES

The value of a Survival Minimum Expenditure

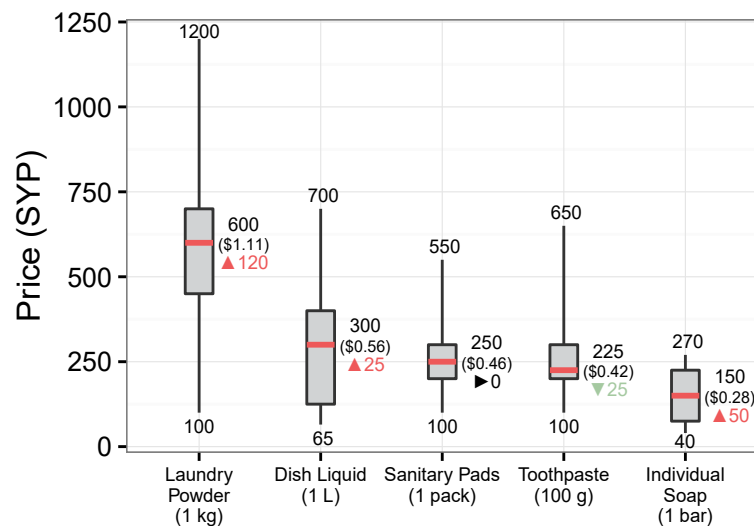
Basket (SMEB) is calculated for each assessed subdistrict by calculating the median prices of all SMEB commodities in that subdistrict and multiplying these medians by the number of units that an average northern Syrian household must purchase in a month. In September, atypically high levels of availability made it possible to assemble SMEBs for 20 of the 29 subdistricts for which full price monitoring data was submitted. Of these, the least expensive complete SMEB, at 55,950 SYP (103.61 USD) was available in Jawadiyah subdistrict. The SMEB in Saraqab (56,192 SYP, 104.06 USD) remained the next least expensive across northern Syria, despite a 15.8% increase in cost since August.

The most expensive complete SMEB, meanwhile, was observed in Afrin (73,175 SYP, 135.51 USD), with the basket in Idlib city not far behind at 71,760 SYP (132.89 USD). Though SMEB costs in Deir-ez-Zor are in general far greater than those in any other monitored market, no data was collected in that city during the month of September. The values of all baskets can be compared using the SMEB map, though caution should be taken to compare only baskets that are missing the same commodities.

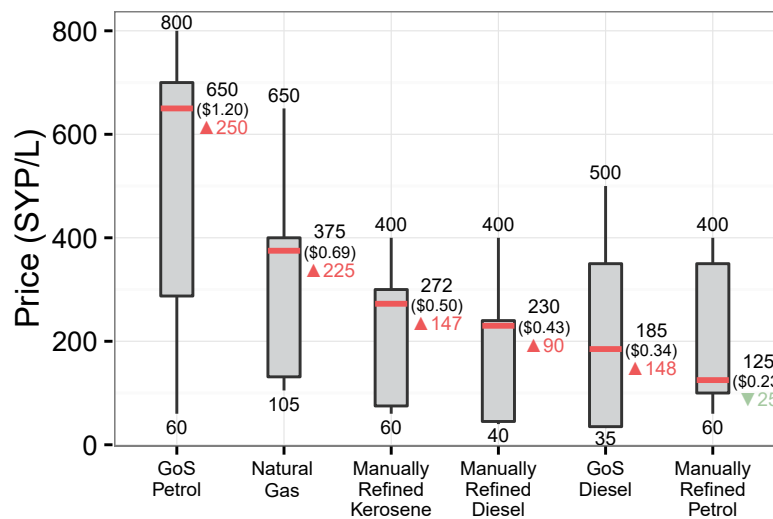
FOOD ITEMS



NON-FOOD ITEMS

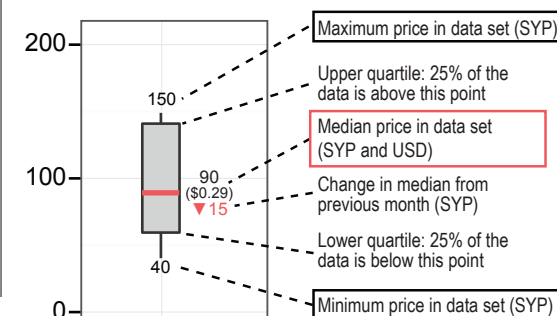


FUEL

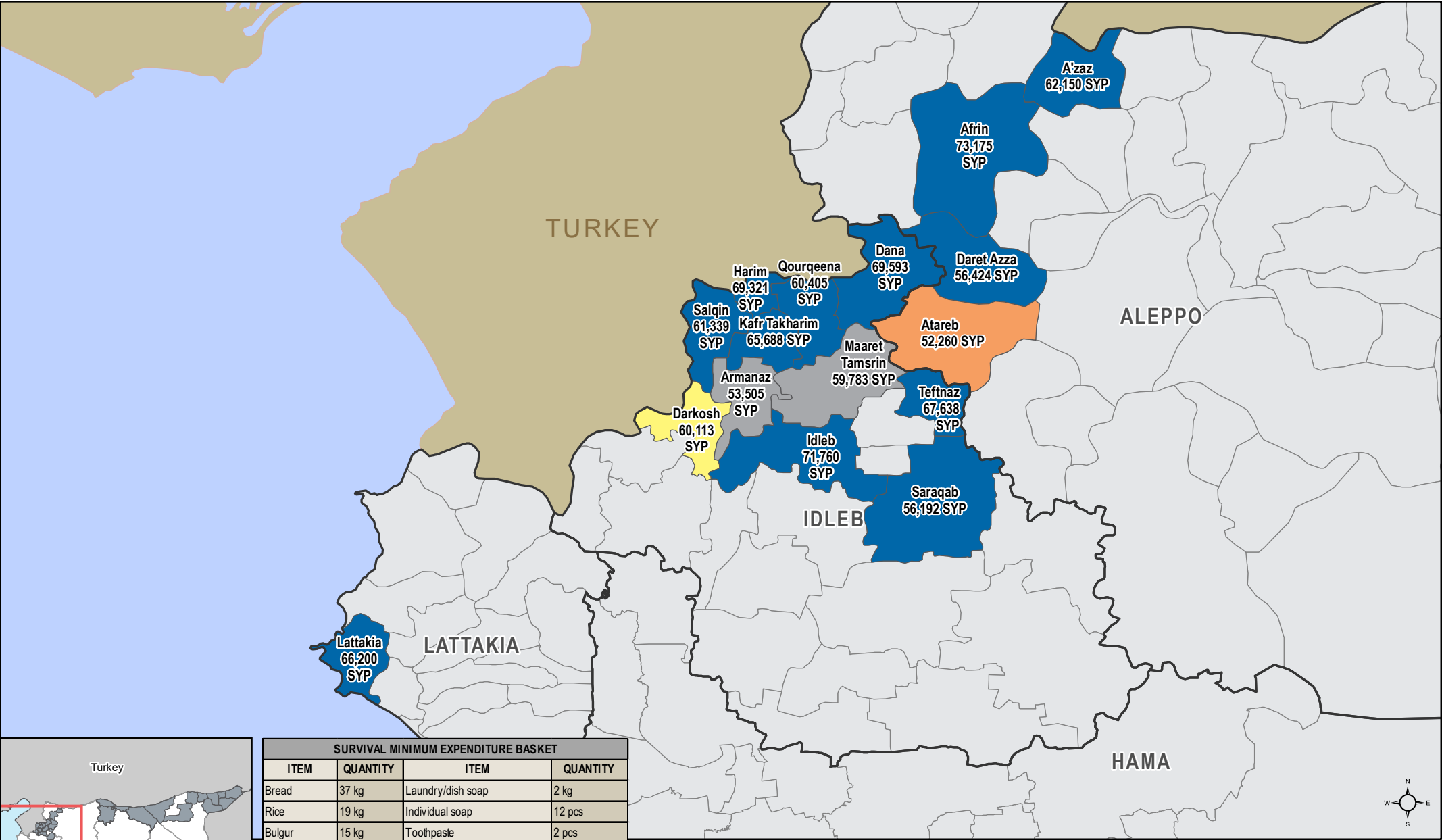


How to read a box plot

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 - Northern Syria Market Monitoring Exercise
SMEB Prices in Northwestern Governorates - September 2016



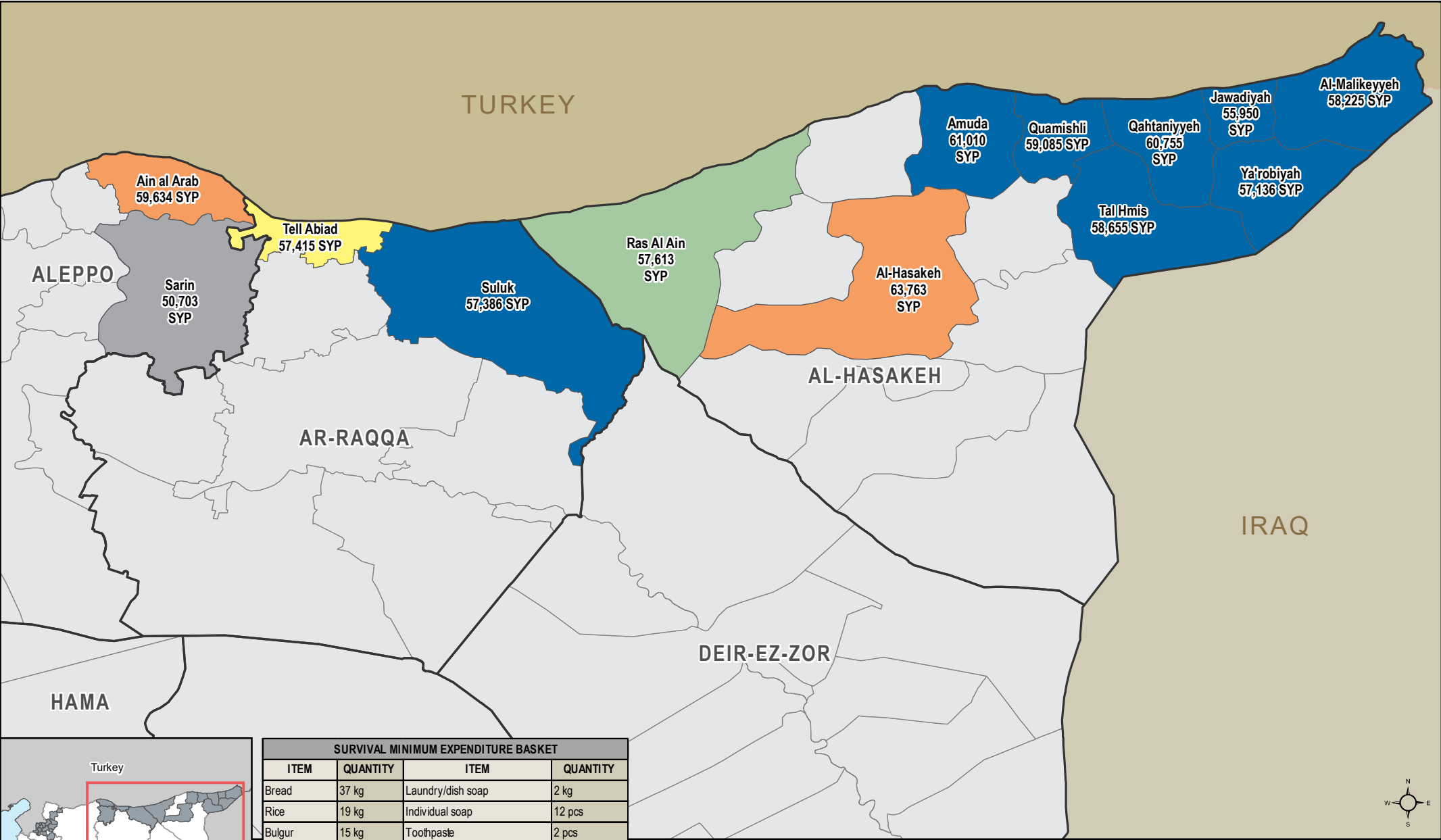
SURVIVAL MINIMUM EXPENDITURE BASKET			
ITEM	QUANTITY	ITEM	QUANTITY
Bread	37 kg	Laundry/dish soap	2 kg
Rice	19 kg	Individual soap	12 pcs
Bulgur	15 kg	Toothpaste	2 pcs
Ghee	7 kg	Sanitary pads	4 packs of 10
Sugar	5 kg	Dried pulses	19 kg
Tomato paste	6 kg	Fresh vegetables	6 kg
Chicken	4 kg	Kerosene (manually refined)	25 L
Eggs	6 kg	Water	2790 L
Salt	1 kg	6% float*	6% total value
* not included in SMEB calculations			

- Complete SMEB
- SMEB without bread
- SMEB without kerosene
- SMEB without multiple items
- SMEB without chicken
- Subdistricts not surveyed

Data sources:
Boundaries - UN OCHA COD
Market monitoring data - REACH, CBR-TWG
Coordinate System: GCS WGS 1984
File:
REACH_SYR_SMEB_Sep2016_NW_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.

SYRIA - Northern Syria Market Monitoring Exercise
SMEB Prices in Northeastern Governorates - September 2016



SURVIVAL MINIMUM EXPENDITURE BASKET			
ITEM	QUANTITY	ITEM	QUANTITY
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