

# Rapid Market Assessment (RMA) - Al-Hasakeh, Ar-Raqqa, Aleppo

28-29 January 2026 | Syria

## Context

This Rapid Market Assessment (RMA) examined market conditions and functionality in Ar-Raqqa, Al-Hasakeh, and part of Aleppo Governorate, in the context of conflict escalation and population displacement occurring in January 2026.

**Overall, while markets in Raqqa Governorate remain largely functional, significant geographical disparities exist in Al-Hasakeh and Aleppo Governorates, where high levels of business interruption, shortages of essential items, and widespread price increases indicate severe, localized market stress. These disruptions are driven by insecurity, upstream supply chain constraints, limited stock, and constrained financial and logistical capacity, likely affecting market functionality and thus, household access to critical goods and services.**

## Key Messages

- Findings indicate **severe and escalating market disruption across Al Hasakeh Governorate, with the most acute impacts reported in Maabada, Qahtaniyyeh, as well as Ain Al Arab**, where the majority of KIs indicated that fewer than 25% of shops were operational.
- Insecurity was by far the most frequently cited driver of shop closure (88%), followed by shortages of supplies (72%), difficulties in sourcing goods (72%), movement restrictions, lack of financial capital, and upward price pressures at the source.**
- Findings indicate a **reduction in the market availability of essential item categories in Ain Al Arab and across several communities in Al Hasakeh Governorate**. Overall, food items, notably fresh vegetables and bread, alongside transportation fuels, cooking and heating fuels, and water trucking services, recorded the highest shares of reported limited market availability.
- Market availability of water trucking services in Al Hasakeh and Raqqa governorates has reportedly deteriorated**, largely linked to persistent transportation fuel shortages, raising concerns about reduced household water access and potential downstream public health risks.
- Price increases were reported by the majority of KIs across all three assessed governorates**, indicating that price pressures are widespread rather than spatially localized. Indicative comparisons with October 2025 JMMI data confirm that price changes occurred across the assessed locations. **Indicative comparisons with October 2025 JMMI data show that price changes occurred across the assessed locations.** The largest reported increases were observed in Ain Al Arab (tomatoes +67%, subsidized LPG +29%), Al-Hasakeh (non-subsidized bread +57%, diesel +33%), and Raqqa (flour +23%).
- Increased customer demand** was reported by a substantial majority of KIs in Al Hasakeh Governorate, as well as by all KIs interviewed in Ain Al Arab community. The majority of KIs reporting increased demand also indicated facing significant **constraints in responding to this increase**. The most frequently cited barrier was insufficient stock availability, followed by insecurity and limited financial capacity to procure additional stock.

## Methodology Overview

The assessment used a Key Informant Interview (KII) methodology with vendors of essential goods, including food, hygiene-related non-food items (NFIs), cooking and transportation fuels, and shelter-related items. A total of 148 KIIs were conducted across 21 communities between 28 and 29 of January 2026.

Communities were selected through the triangulation of multiple data sources and analytical criteria, including: (1) communities reportedly experiencing the highest supply chain disruption, based on consultations with the Syria CWG and OCHA; (2) communities most frequently cited as primary market hub within each governorate in the [July 2025 REACH Market Network Analysis](#); and (3) communities considered accessible in light of REACH field access capacity. In line with these criteria, only Ain Al Arab community was assessed in Aleppo Governorate.

The number of KIIs per community was determined based on population size as recorded by IOM [Displacement Tracking Matrix \(DTM\) Baseline Assessment of October 2025](#): three KIIs in communities with fewer than 1,000 residents, five in communities with populations between 1,000 and 10,000, and nine in communities exceeding 10,000 residents.

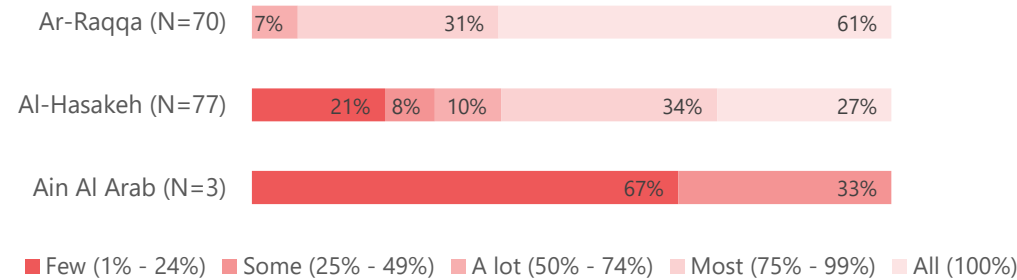
Results for Ar-Raqqa and Al-Hasakeh are primarily presented at the governorate level, based on [OCHA administrative boundaries as of December 2025](#). These boundaries may not fully reflect current realities on the ground, as they do not necessarily align with shifting lines of control. Readers should consider this when interpreting the findings, since market access and service availability are often influenced more by de facto control and security conditions than by official administrative divisions.

## Market Functionality

**Market disruption was most severe in Ain Al Arab**, where all KIIs reported that fewer than half of shops were operational. In contrast, while shop operability remained relatively high across much of Al-Hasakeh Governorate, significant localized disruptions were observed, particularly in the communities of **Maabada and Qahtaniyyeh** (Map 1). Additional increases in business interruption and shop closures since mid-January 2026 were also reported in other communities, including Al-Hasakeh city, Al-Malikeyeh, and Jawadiyah.

Results from the [July 2025 REACH Market Network Analysis](#) identified Maabada as a key market hub relied upon by surrounding communities to source essential goods. Disruptions in Maabada may therefore have wider implications beyond the community itself, potentially constraining access to essential items for dependent areas and amplifying supply and availability risks at the governorate level.

### Share of KIIs by reported level of shop operability in their local markets



### Top five most frequently mentioned challenges to shop operability, by share of KIIs reporting that fewer than half of shops in their community are open

Issues with insecurity in the area	88%
Curfews/movement restrictions	72%
Shortage of supplies or difficulties finding supplies	72%
Lack of funds to run business as always	68%
Price increase from the source	64%

**95%** of KIIs in Al-Hasakeh Governorate reported that **most or all (>75%) financial service providers (FSPs) were operating normally in local markets.**

**87%** of KIIs in Ar-Raqqa Governorate reported that **most or all (>75%) FSPs were operating normally in local markets.**

**100%** of KIIs in Ain Al Arab community (N=3) reported that **only few (<25%) FSPs were operating normally in local markets.**

## Supply Chains Disruptions

**Across the vast majority of assessed communities in Al Hasakeh, as well as in Ain Al Arab community, most KIIs reported a degree of disruptions along supply chains for essential items** (Map 1).

**71%** of KIIs in Ar-Raqqa Governorate reported **no supply chain disruptions**

**90%** of KIIs in Al-Hasakeh Governorate reported **some disruptions to supply chains**

**100%** KIIs in Ain Al Arab community (N=3) reported **complete supply chain disruption.**

**Across both Ain Al Arab and the assessed communities in Al Hasakeh Governorate, supply chains of fresh vegetables, transportation fuels, and cooking fuels emerged as particularly vulnerable to further disruption.** KIIs dealing in these items more commonly reported short stock duration, high supplier concentration, mostly relying on a single or very limited number of suppliers, combined with restricted geographical diversity of supply origins.

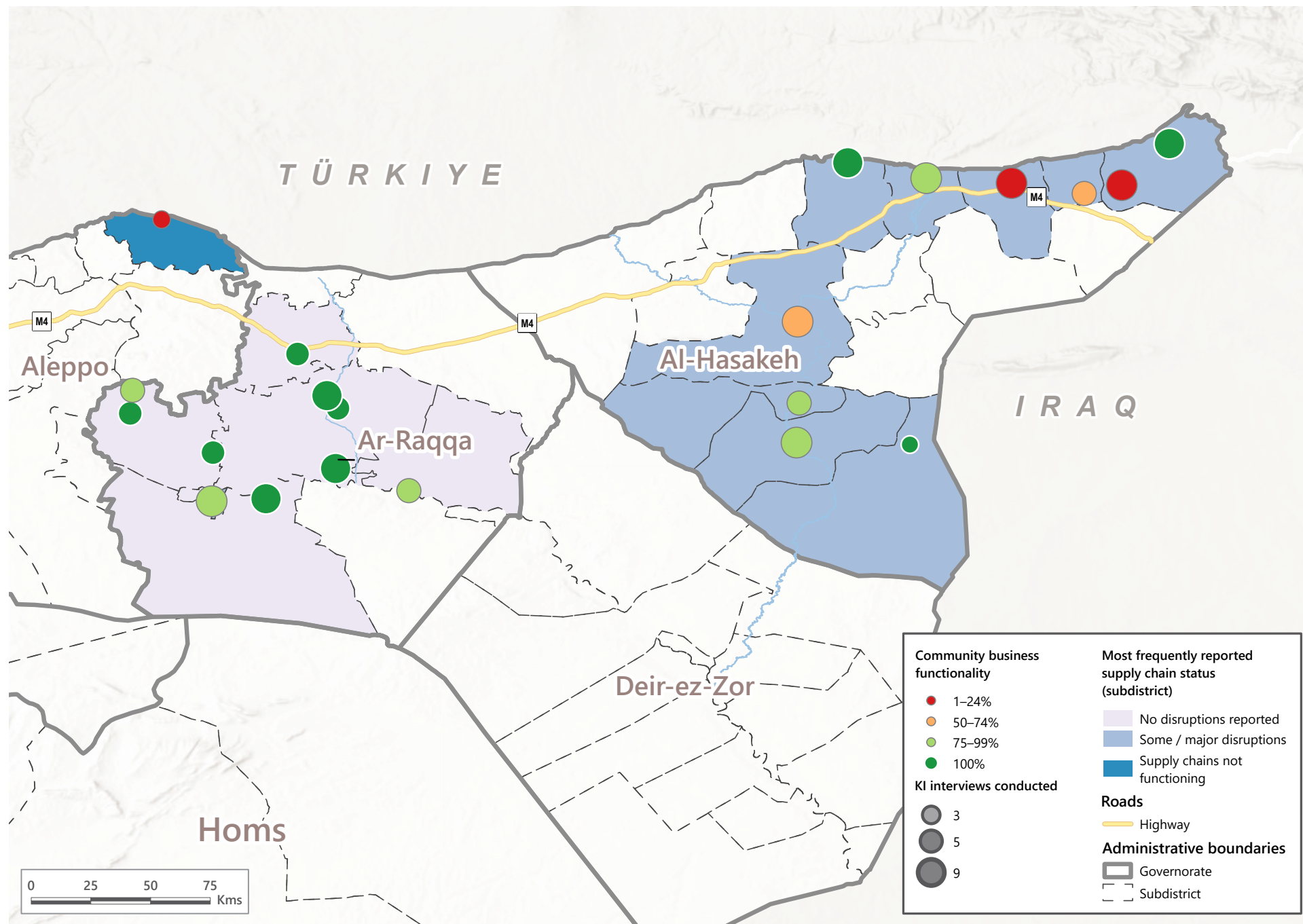
### Share of KIIs operating in Ain Al Arab and Al-Hasakeh Governorate, by reported main place of origin, average number of suppliers, and median stock duration, disaggregated by item category

		Cooking fuels	Transportation fuels	Fresh vegetables
Place of origin	Deir ez-Zor	23%	27%	0%
	Raqqa	23%	13%	13%
	Hasakeh	92%	87%	53%
	Iraq	0%	27%	57%
	Aleppo	0%	0%	0%
	Turkey	0%	0%	30%
Relying on mostly 1 supplier		46%	40%	43%
Median stock duration (days)		3	3	2

Reported trends in market demand varied across assessed locations. In Ar-Raqqa Governorate, most KIIs (57%) reported that demand for goods has remained broadly stable since the conflict escalation and associated displacement in mid-January. In contrast, **increased demand was reported by the majority of KIIs in Al-Hasakeh Governorate (70%) and by all KIIs in Ain Al Arab.**

**Most vendors (62%) reporting increased demand also indicated facing significant constraints in responding to this increase. Insufficient stock availability** was the most commonly reported barrier, followed by insecurity and limited financial capacity to procure additional stock, suggesting that rising demand is occurring in a context of constrained supply responsiveness.

Map 1: Most frequently reported community-level business functionality overlaid with supply chain status at the sub-district level since mid-January 2026



## Essential Items Availability

Findings indicate a reduction in the market availability of essential item categories in Ain Al Arab and across several communities in Al Hasakeh Governorate. Overall, food items, notably fresh vegetables and bread, alongside transportation fuels, cooking and heating fuels, and water trucking services, recorded the highest shares of reported limited market availability.

In Ain Al Arab, all KIIs reported very limited or complete unavailability of essential items across all monitored categories. Across Al-Hasakeh Governorate, the communities most frequently reporting limited market availability across multiple item categories were Maabada, Qahtaniyyeh, Shaddadah, Al-Malikeyyeh, Al-Hasakeh city, and Quamishli. In contrast, in Ar-Raqqa, the vast majority of KIIs across all communities reported wide availability of all monitored items.

Share of KIIs operating in Ain Al Arab and Al-Hasakeh Governorate, by reported level of item category availability in local markets at the time of data collection

	Almost fully available	Very limited availability	Completely unavailable
Fresh vegetables	46%	50%	4%
Bulk food items	76%	24%	0%
Poultry items	85%	15%	0%
Bread	60%	40%	0%
Hygiene NFIs	90%	10%	0%
Transportation fuels	23%	73%	5%
Cooking/heating fuels	23%	69%	9%

**41%** of KIIs in Al-Hasakeh Governorate reported **water trucking services as completely unavailable**

**30%** of KIIs in Ar-Raqqa Governorate reported **water trucking services as completely unavailable**

**100%** of KIIs in Ain Al Arab community (N=3) reported **very limited availability of water trucking services**

**Several KIIs reported that persistent transportation fuel shortages were contributing to reduced availability of water trucking services.** In Al-Hasakeh and Ar-Raqqa governorates, 41% and 30% of KIIs, respectively, indicated complete unavailability of water trucking, with an additional 21% and 23% reporting very limited availability. By comparison, JMMI findings from October 2025 showed that 77% and 78% of water trucking vendors in these governorates reported services as widely available. Previous REACH assessments in 2025 also confirmed that water trucking constitutes the main source of drinking and domestic water in Al-Hasakeh. These findings point to a **substantial deterioration in water trucking availability, likely impacting household water access and consumption, with potential downstream public health risks.**

## Essential Items Economic Accessibility

Price increases were reported by the majority of key informants across all three assessed governorates, indicating that price pressures are widespread rather than spatially localized. The item categories most frequently reported to have experienced moderate or significant price increases were fresh vegetables (83% of KIIs across all assessed communities), cooking and heating fuels (67%), bread (64%), transportation fuels and bulk food commodities (62% each).

Median SYP\* prices across key item categories recorded on 29 January 2026, compared with median prices recorded by JMMI in October 2025\*\*, in Ain Al Arab and across Ar-Raqqa and Al-Hasakeh governorates

Item	Reference period	Ain Al Arab	Al-Hasakeh	Ar-Raqqa
1 Kg of chicken	29 Jan 2026	SYP 25'000	SYP 25'000	SYP 23'500
	JMMI Oct 2025	SYP 27'000	SYP 25'000	SYP 28'000
1 Kg of tomatoes	29 Jan 2026	SYP 15'000	SYP 10'000	SYP 9'696
	JMMI Oct 2025	SYP 9'000	SYP 8'500	SYP 7'750
1 Kg of rice	29 Jan 2026	SYP 15'000	SYP 12'000	SYP 11'000
	JMMI Oct 2025	SYP 11'250	SYP 11'000	SYP 11'000
1 Kg of flour	29 Jan 2026	SYP 10'000	SYP 8'500	SYP 8'000
	JMMI Oct 2025	SYP 8'000	SYP 8'438	SYP 6'500
1 Kg of unsubsidised bread (7–8 pieces)	29 Jan 2026	SYP 8'000	SYP 7'500	SYP 4'000
	JMMI Oct 2025	SYP 7'000	SYP 4'786	SYP 6'750
1 Kg of subsidised bread (7–8 pieces)	29 Jan 2026	SYP 3'600	SYP 3'500	SYP 3'000
	JMMI Oct 2025	SYP 3'000	SYP 2'839	SYP 2'833
1 bathing soap bar (150gr)	29 Jan 2026	SYP 7'500	SYP 5'000	SYP 5'000
	JMMI Oct 2025	SYP 4'750	SYP 5'000	SYP 5'000
1 L of diesel	29 Jan 2026	SYP 13'000	SYP 7'500	SYP 5'750
	JMMI Oct 2025	N/A	SYP 5'650	SYP 5'650
Unsubsidised LPG canister (24 Kg)	29 Jan 2026	SYP 200'000	SYP 150'000	SYP 175'000
	JMMI Oct 2025	N/A	N/A	N/A
Subsidised LPG canister (24 Kg)	29 Jan 2026	SYP 137'500	SYP 125'000	SYP 125'000
	JMMI Oct 2025	SYP 115'000	SYP 120'000	SYP 125'000

\* For comparability, all SYP prices presented are expressed in pre-reform currency units, reflecting values prior to the currency redenomination implemented in January 2026.

\*\* The sample size and design of this rapid assessment and the JMMI differ considerably, with the JMMI relying on a larger sample and wider geographical coverage. As such, price comparisons between the two sources should be interpreted with caution and considered indicative only.