

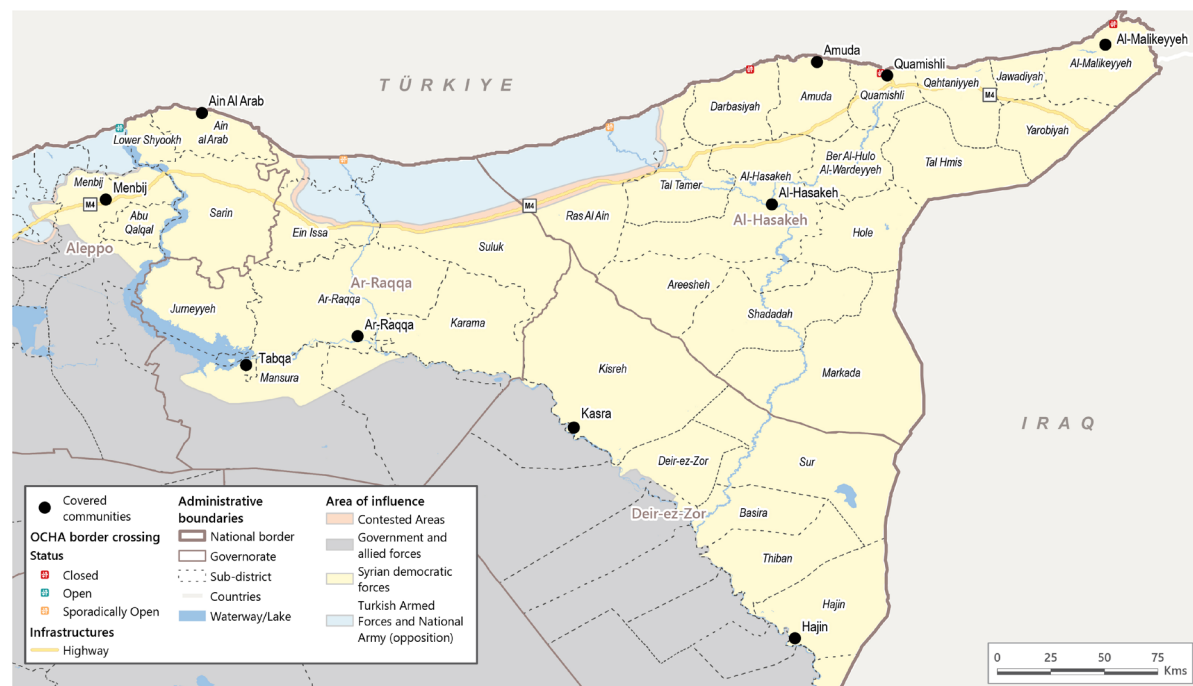
Northeast Syria (NES) fuel price and availability rapid assessment

December 4, 2024 | Northeast Syria

Context & Rationale

Northeast Syria (NES) experienced a significant escalation in conflict activity beginning October 23, including a sharp increase in airstrikes and shelling across Hassakeh, Aleppo, and Raqqah 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 October 27, 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 displacement of over 50,000 individuals from Lebanon, as reported by UNHCR on October 26,⁴ and more recently by the internal displacement following conflict escalations in Aleppo Governorate in November 2024.⁵ 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 black market has recorded the most pronounced monthly increases in median prices for all assessed oil-related products, at both community and NES-wide levels.** By November 25, NES-wide black market median prices had increased by 33% for high-quality diesel, 25% for LPG cylinders (7kg), 10% for high-quality petrol, and 2% for kerosene compared to their levels on October 30, 2024.
- **While the black market has managed to maintain consistent availability of oil-derived products, formal markets continue to face significant challenges.** Since October 23, availability in formal markets has shown no signs of recovery, with disruptions in supply chains persisting due to the escalation of violence. Reports from successive weekly data collection rounds indicate that a substantial proportion of vendors experienced complete stockouts of previously available products on the day of data collection. Additionally, vendors have consistently highlighted recurrent shortages during the week preceding each round, underscoring the ongoing strain on formal market functionality.
- **In mid-November, the Autonomous Administration of North and East Syria (AANES) raised the official prices for diesel sold in fuel stations, marking a significant shift in the formal market.** Subsidized diesel for private transportation rose from 2300 SYP/liter to 4700 SYP/liter (a 104% increase), while unsubsidized diesel increased from 4700 SYP/liter to 6000 SYP/liter (28% increase). This was the first recorded increase in formal market rates after four weeks of stability and is likely to have speculative repercussions on black market prices, potentially fueling further increases.

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 5 - November 25, 2024), among those who typically sold the product before October 23, 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	R4	R5	R1	R2	R3	R4	R5	R1	R2	R3	R4	R5
Fuel stations	Unsubsidised petrol	8/19	6/18	6/18	6/16	6/20	15/19	17/18	18/18	15/16	14/20	4.5	5.5	5.1	5.1	5.9
	Subsidised petrol	7/17	10/19	7/18	14/19	10/14	14/17	13/19	18/18	16/19	13/14	4.6	4.9	4.5	4	4.1
	Unsubsidised diesel (private transport)	14/21	12/17	9/17	4/17	4/17	13/21	12/17	17/17	13/17	12/17	3.9	4.4	3.4	5.2	5.7
	Subsidised diesel (public transport)	3/7	7/8	6/8	12/13	9/9	5/7	4/8	5/8	9/13	7/9	4.9	4.7	3.8	3.2	2.1
	Imported petrol	5/5	5/5	5/5	5/5	5/5	0/5	0/5	1/5	1/5	1/5	0	0	1	1	1
Black market	High quality diesel	32/35	33/34	32/35	34/35	35/39	12/35	9/34	10/35	4/35	6/39	2	1.6	3	4	3.5
	High quality petrol	33/33	35/36	35/36	36/37	36/37	6/33	2/36	3/36	4/37	3/37	4.3	3	1.5	2	1.5
	Kerosene	19/19	20/20	19/20	20/21	26/26	1/19	1/20	2/20	4/21	3/26	1	1	2	1.3	2
	LPG cylinders (7kg)	23/30	27/32	21/33	24/31	21/31	17/30	23/32	25/33	28/31	30/31	4.8	4.3	4.4	3.8	3.7
Communes ⁶	LPG cylinders (7kg)	22/39	10/39	6/35	14/37	12/38	36/39	37/39	35/35	36/37	38/38	5.6	5.6	6	5.8	5.5

Stockouts and supply chain disruptions in NES formal markets

Table 1 indicates that, since October 23, formal fuel markets in Northeast Syria (NES), including fuel stations and communes, have reported a notable decline in the availability of oil-derived products. **Vendors from both fuel stations and communes consistently indicated reduced availability of nearly all previously sold products, except for imported fuel.** Furthermore, the majority of formal market vendors, across all rounds of data collection and across all assessed product categories, continue to report stockouts of previously available products within the seven days preceding data collection. **In contrast, the black market maintained consistent product availability during the assessed period (October 30– November 25, 2024), albeit with the highest recorded price increases since data collection began (Table 3).**

The reduction in product availability in formal markets in NES is likely a consequence of the escalating security situation, which has disrupted the extraction, production, and distribution of oil-derived products. During the most recent round of data collection, 82% of fuel station vendors reported that supply chain disruptions were primarily due to increased demand, followed by 79% who cited reduced and insufficient levels of oil-related product production as the main reason for disruptions.

Official diesel price adjustments in formal markets

Recent data suggests a potential recovery in the availability of subsidized diesel in formal markets following an initial decline observed during the first three rounds of data collection (between October 30 and November 11). This trend is evidenced by an increasing number of vendors reporting its availability during the last two rounds (between November 11 and November 25). **The improvement may be linked to the reported official price adjustments for subsidized and unsubsidized diesel implemented by the Autonomous Administration of North and East Syria (AANES) in mid-November.**

Regarding subsidized diesel, it is important to note that during the first four rounds of data collection (between October 30 and November 18), REACH only recorded prices for subsidized diesel allocated for public purposes, not for private usage. **According to REACH Field Officers (FOs), subsidized diesel for private purposes, previously priced at 2,300 SYP/liter by the AANES, had reportedly been unavailable in fuel stations for the past five months. As a result, households were forced to rely solely on unsubsidized diesel, priced at 4,700 SYP/liter, for private use.**

Photo 1: A diesel vendor operating on the black market in Raqqa is seen displaying a price of 8,000 SYP/liter for high-quality diesel. The image was captured by REACH Field Officers (FOs) in Raqqa on November 21, 2024.



From mid-November, the AANES has reportedly progressively resumed distributing subsidized diesel for private usage at a new, increased price of 4,700 SYP/liter, aligning with the earlier unsubsidized diesel price (Table 2). Simultaneously, the price of unsubsidized diesel was reportedly raised from 4,700 SYP/liter to 6,000 SYP/liter (Table 2), reaching price levels of the black market.

This adjustment to the prices of subsidized and unsubsidized diesel at fuel stations marks the first increase in formal market rates following four weeks of recorded stability, with prices rising by 104% and 28%, respectively.

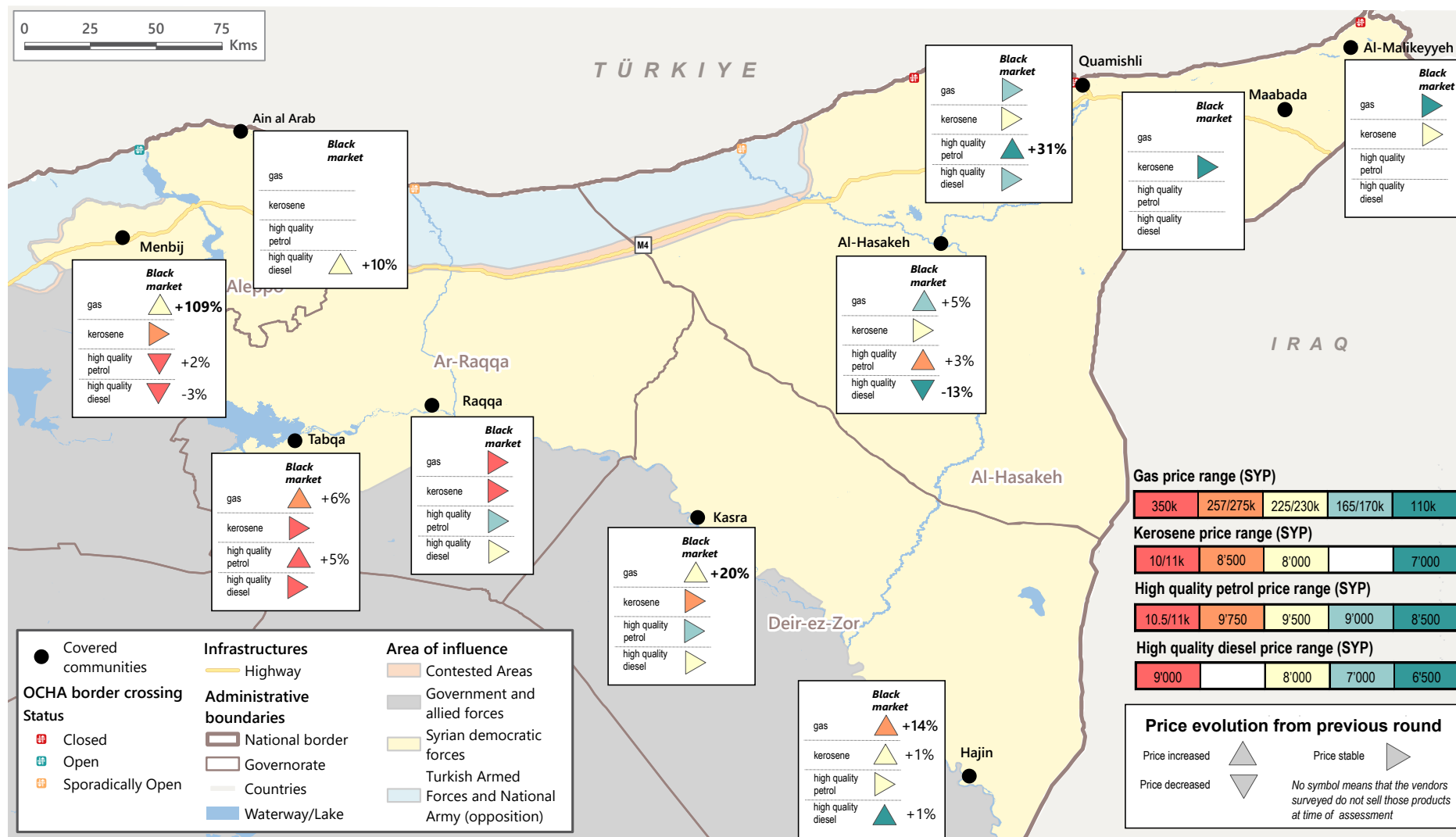
The recent diesel price adjustments in NES may have significant economic repercussions, particularly on the dynamics of the black market. By setting the new price for subsidized diesel for private usage at 4,700 SYP/liter—the same as the former unsubsidized rate—and simultaneously raising the unsubsidized diesel price to 6,000 SYP/liter, the formal market risks exacerbating dependence on black market diesel. This increased reliance could lead to a chain reaction, pushing black market prices higher as demand surges in response to persistent formal market shortages.

From an availability perspective, the approximate alignment of unsubsidized diesel prices in formal markets with black market rates, combined with persistent gaps in formal market availability, may encourage black market vendors to further manipulate supply at their discretion, driving up prices and reducing availability.

The increased official price for diesel used for private purposes is likely to exacerbate household financial pressures, particularly during the winter months when heating needs intensify. This strain is compounded by indirect effects, as higher transportation costs could drive up the prices of essential goods and services. In a context where consistent income opportunities remain scarce, these cascading impacts are likely to deepen the economic challenges faced by communities in NES, especially those relying on agriculture and other diesel-dependent activities.

This analysis relies predominantly on anecdotal data reported by REACH Field Officers (FOs). As it lacks a systematically structured methodological collection process, its precision and reliability are limited, and the findings should be interpreted as indicative only.

Map 2: Median price ranges (SYP) recorded in Round 5 (November 25, 2024), weekly market price trends and percentage change compared to Round 4 (November 18, 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 Raqqqa Governorates, including Raqqqa, Tabqa, and Menbij, exhibit a higher concentration of the highest recorded price ranges for all assessed products compared to other communities and governorates.

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-wide⁷ median prices (SYP) recorded in Round 5 (R5 - November 25, 2024), and percentage changes compared to Round 1 (R1- October 30, 2024), disaggregated by product⁸

Community	Round	Black market								Commune		Fuel stations											
		High quality diesel		High quality petrol		Kerosene		LPG cylinder (7Kg)		LPG cylinder (7Kg)		Subsidised diesel Public transport		Subsidised diesel Private transport		Unsubsidised diesel		Subsidised petrol		Unsubsidised petrol		Imported petrol	
		Price	Change	Price	Change	Price	Change	Price	Change	Price	Change	Price	Change	Price	Change	Price	Change	Price	Change	Price	Change	Price	Change
Ain Al Arab	R5	8000	33%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	4700	NA	NA	NA	425	NA	NA	NA	NA	NA
	R1	6000		NA		NA		NA		NA		NA		NA		4700		NA		NA		NA	
Al-Ha-sakeh	R5	6500	8%	9750	3%	8000	NA	170000	1%	NA	NA	525	NA	NA	NA	4700	0%	NA	NA	NA	NA	15660	0%
	R1	6000		9500		NA		167500		NA		NA		NA		4700		NA		NA		15660	
Al-Ma-likeyyeh	R5	NA	NA	NA	NA	8000	NA	110000	NA	NA	NA	525	0%	4700	NA	NA	NA	425	0%	NA	NA	NA	NA
	R1	NA		NA		NA		NA		NA		525		NA		4700		425		4700		NA	
Amuda	R5	NA	NA	NA	NA	NA	NA	NA	NA	125000	4%	525	0%	NA	NA	4700	0%	425	0%	4700	0%	NA	NA
	R1	NA		7000		NA		210000		120000		525		NA		4700		425		4700		NA	
Ar-Raqqa	R5	8000	3%	9000	-10%	10000	5%	350000	71%	120000	0%	NA	NA	4700	NA	NA	NA	425	0%	4700	0%	NA	NA
	R1	7750		10000		9500		205000		120000		NA		NA		4700		425		4700		NA	
Hajin	R5	6500	25%	9500	36%	8000	45%	257500	41%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	R1	5200		7000		5500		182500		NA		NA		NA		NA		NA		NA		NA	
Kasra	R5	8000	33%	9000	16%	8500	13%	225000	53%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	R1	6000		7750		7500		147500		125000		NA		NA		NA		NA		NA		NA	
Maabada	R5	NA	NA	NA	NA	7000	NA	NA	NA	115000	0%	NA	NA	4700	NA	NA	NA	NA	NA	4700	0%	NA	NA
	R1	NA		NA		NA		NA		115000		NA		NA		4700		425		4700		NA	
Menbij	R5	9000	20%	10500	-5%	8250	0%	230000	NA	110000	NA	NA	NA	4700	NA	NA	NA	425	NA	NA	NA	16000	0%
	R1	7500		11000		8250		NA		NA		NA		NA		NA		NA		NA		16000	
Qua-mishli	R5	7000	17%	8500	31%	8000	NA	165000	-1%	NA	NA	525	NA	4700	NA	6000	28%	425	0%	4700	0%	15660	0%
	R1	6000		6500		NA		167500		110000		NA		NA		4700		425		4700		15660	
Tabaqa	R5	9000	13%	11000	-8%	11000	NA	275000	25%	110000	0%	NA	NA	NA	NA	NA	NA	425	0%	NA	NA	NA	NA
	R1	8000		12000		NA		220000		110000		NA		NA		NA		425		NA		NA	
NES-wide	R5	8000	33%	9500	10%	8000	2%	227500	25%	115000	-2%	525	0%	4700	NA	4700	0%	425	0%	4700	0%	15660	0%
	R1	6000		8625		7875		182500		117500		525		NA		4700		425		4700		15660	

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 five rounds of data collection:

- Round 1 - 30/10/2024 - 147 surveys
- Round 2 - 4/11/2024 - 152 surveys
- Round 3 - 11/11/2024 - 148 surveys
- Round 4 - 18/11/2024 - 148 surveys
- Round 5 - 25/11/2024 - 159 surveys

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 5 (November 25, 2024)

Community	Black market - Fuel	Black market - Gas	Communes	Fuel stations	Total
Ain Al Arab	4	1	4	4	13
Al-Hasakeh	12	4	4	4	24
Al-Ma-likeyyeh	1	1	NA	4	6
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	3	NA	3	2	8
Menbij	5	4	4	4	17
Quamishli	7	6	4	4	21
Tabaqa	3	4	4	4	15
Grand Total	56	31	38	34	159

Endnotes

- 1 NES 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 NES 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 OCHA (30/11/2024), [“Flash Update #3: Recent Developments in Aleppo”](#), ReliefWeb
- 6 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.
- 7 The NES-wide median price was determined by taking a simple median of the median prices calculated at the community level.
- 8 It is important to emphasize that the number of communities assessed for each product category across different rounds of data collection has not been consistent, and the sample size remains relatively limited. As a result, this variability can impact the representativeness of the median prices at both the community level and for the broader NES region. This inconsistency in the sample size may affect the methodological accuracy of the data, as well as the relevance of comparisons between community-level and NES-wide median prices.

ABOUT REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT).