

Northern Syria Market Monitoring Exercise

January 2017

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 16 and 22 January 2017, 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. Eleven partners (ACTED, CARE/Shafak, Concern, GOAL, Ihsan, IRC, Mercy Corps, People in Need, REACH, Solidarites International and Violet) contributed data from 46 subdistricts across Lattakia, Idleb, Aleppo, ar-Raqqa and al-Hasakeh governorates.

Four 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

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

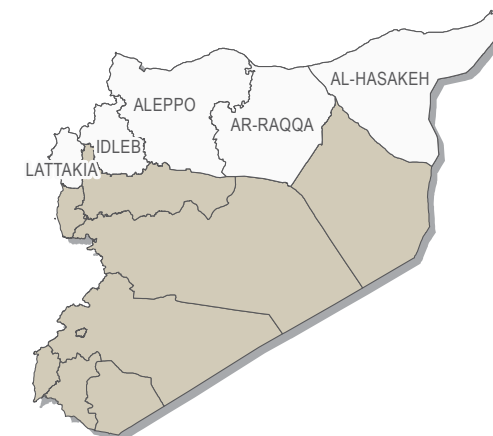
structures and had to sell certain items to be eligible for inclusion.

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, 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.

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 and Quamishli, where only markets on one side of the frontline could be surveyed. Moreover, in January, coverage remained impossible in the cities of Aleppo, Ar-Raqqa and Deir-ez-Zor due to operational constraints, as had been the case in December.

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.

JANUARY 2017: NORTHERN SYRIA CONTEXT

A nationwide ceasefire between some parties to the conflict came into force in late December, with the result that there was greater stability in many parts of the country in January than in December, which likely reduced pressure on markets. However, clashes involving groups excluded from the ceasefire continued, and some ceasefire violations were reported.

The heaviest clashes in northern Syria in January occurred primarily around the towns of Ar-Raqqa, Deir-ez-Zor and Al-Bab, where some parties to the conflict were not participating in the ceasefire. This led to an outflow of IDPs from these areas to nearby subdistricts. The security and humanitarian situation was reported to be most critical in Deir-ez-Zor city, due to the heavy restrictions on civilian movement and challenges to accessing food and water.

COMMODITY PRICE CHANGES

The median informal US dollar exchange rate for the Syrian pound increased by just under 2%, from 507 to 517 SYP/USD, between December 2016 and January 2017. This was after it had fallen by 4.3% from November to December. As in December, the range of sell rates was relatively small, with 15 SYP separating the highest rate of 525 SYP/USD in Lattakia city and the lowest rate of 510 SYP/USD, which was reported in Tal Hmis. The median sell rate for the Turkish lira experienced its fourth consecutive monthly fall, reducing from 145 SYP/TRY in December to 137 SYP/TRY in January. Local exchange rates ranged from 141 SYP/TRY in Tamanaah to 125 SYP/TRY in Badama.

Median food prices generally decreased in January, following the ceasefire in many parts of the country, in contrast with the price stability seen in December. Median prices fell for 11 out of 17 assessed food items. This included three items — flour, bulgur and

MAIN PRICE CHANGES

EGGS, FLOUR, MANUALLY REFINED PETROL, TOOTHPASTE, BULGUR

vegetable oil — that had not undergone a median price change since August 2016, and one — bread — that had seen consecutive monthly price increases since September 2016. The food items with the largest percentage decreases in price in January were flour, eggs, bulgur, onions, bread and red lentils, all of which reduced by more than 10% from December, although no assessed food price decreased by more than 20%. These decreases in median prices generally reflected price reductions across assessed governorates. However, some prices, such as those of flour, bread and bulgur, were more stable in Al-Hasakeh governorate, where prices often tended to be lower than elsewhere. The median prices of rice, tea and salt increased, although only that of salt rose by more than 10%. The median prices of all assessed fresh vegetables other than onions remained unchanged between December and January.

Median sanitation and hygiene item prices also generally reduced between December and January. The exception was the median price of a pack of 10 sanitary pads, which has remained at 250 SYP (0.48 USD) since July 2016. The median price of 100g of toothpaste fell for the first time since October 2016, from 250 to 200 SYP (0.49 to 0.39 USD), while those of laundry powder, dishwashing liquid and bathing soap decreased by 50, 30 and 15 SYP respectively.

Fuel prices were considerably more stable between December and January than in recent months. Only one assessed fuel — manually refined petrol — experienced a median price change of more than 10%, from 250 to 300 SYP (0.49 to 0.58 USD). However, this median increase reflected an increase in coverage in Aleppo and Idleb governorates, where fuel was not subsidised, rather than substantial price changes at the governorate level. The median prices of LP gas and both GoS (Government of Syria) and manually

MAIN SHORTAGES

GoS DIESEL, GoS and MANUALLY REFINED PETROL, BREAD, KEROSENE

refined diesel slightly increased, while that of GoS petrol remained the same as in December and that of kerosene slightly decreased.

The median rate for private water trucking services in January was 0.59 SYP per litre of water, similar to the median price of 0.57 SYP per litre reported in December. Prices ranged from a minimum of 0.27 SYP per litre in Ma'arrat An Nu'man to a maximum of 1.06 SYP per litre in Kafr Takharim.

ISSUES OF AVAILABILITY

The cities of Aleppo, Ar-Raqqa and Deir-ez-Zor, which reported the most SMEB item shortages in November, were not assessed in December or January. No assessed subdistrict in December was missing more than one SMEB item, other than Lower Shyookh, which was missing kerosene, chicken and salt. Availability of SMEB items was generally higher in January than in December, with all SMEB items available in 35 out of 46 subdistricts in January compared to 23 out of 34 in December.

As has been the case since September 2016, the most commonly reported SMEB item shortages in assessed areas were those of bread and kerosene. However, the number of subdistricts reporting bread shortages fell from nine to four between December and January, possibly due to decreased levels of conflict following the recent ceasefire. Meanwhile, the number reporting kerosene shortages rose from two to five, likely reflecting an increased need for the fuel due to cold weather. The kerosene shortages were mostly reported from subdistricts in Aleppo governorate, while the subdistricts missing bread were in Idleb and Al-Hasakeh governorates. In addition to these, two subdistricts were reportedly missing chicken, and one each missing toothpaste and salt.

For non-SMEB fuels, GoS diesel and manually refined petrol were the hardest to obtain, as had been the case in December, and were unavailable

in 10 and 9 subdistricts respectively in January. In contrast, the number of subdistricts missing manually refined diesel and LP gas decreased from one to zero and four to two, respectively, from December to January. The number of subdistricts reported to be missing GoS petrol, meanwhile, increased from two to five. The subdistrict with the fewest available assessed fuels was Daret Azza, where only GoS petrol and manually refined diesel were reportedly available.

SMEB VALUES

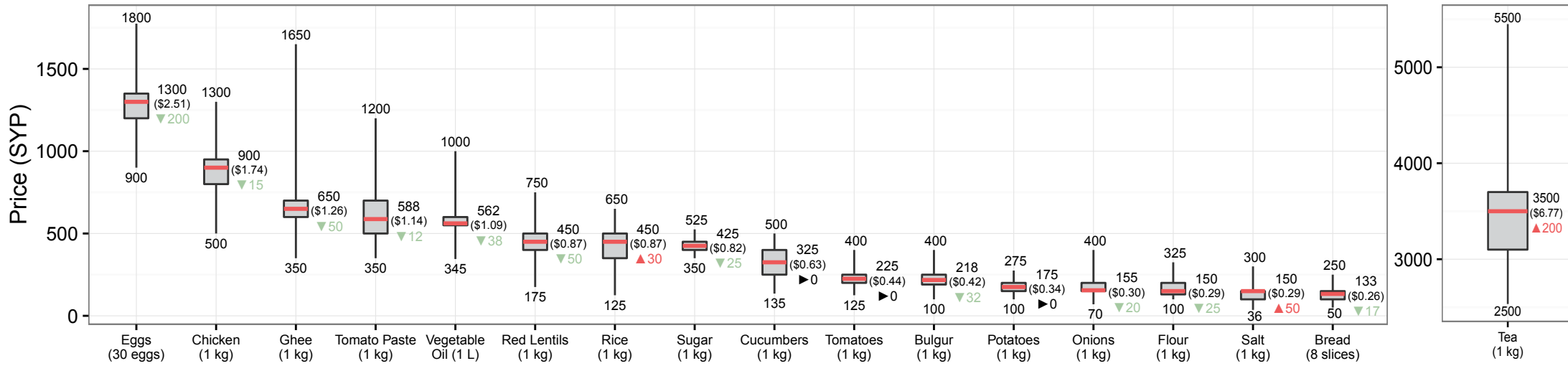
The value of a Survival Minimum Expenditure Basket (SMEB) is calculated for each assessed subdistrict by calculating the median prices of all SMEB commodities in that subdistrict and multiplying these medians by the number of units that an average northern Syrian household was possible to purchase in a month. In January, it was possible to assemble complete SMEBs for 35 out of 46 assessed subdistricts. In keeping with the general trend of falling prices, SMEB prices also decreased from December to January. Of the 19 communities where a complete SMEB was available in both months, SMEB prices decreased in 16.

Of these, the eight cheapest complete SMEBs were all reported in Al-Hasakeh governorate, with the least expensive SMEB available in Qahtaniyyeh subdistrict at 49,570 SYP (95.88 USD), followed by that in neighbouring Quamishli (50,393 SYP, 97.47 USD), which experienced a decrease of 14.6%. As was the case in December, the most expensive complete SMEB in January was observed in Tamanaah (77,336 SYP, 149.59 USD), although this was a 9.7% decrease from the SMEB price there in December. The next most expensive was reported from Khan Shaykun, at 72,803 SYP (140.82 USD). The largest SMEB price decrease, by 27.5%, was reported from Badama subdistrict, while the largest increase, of just 5.9%, was seen in Saraqeb. In previous months, the highest SMEB prices were often reported from Ar-Raqqa or Deir-ez-Zor cities, which were not covered in December or January.

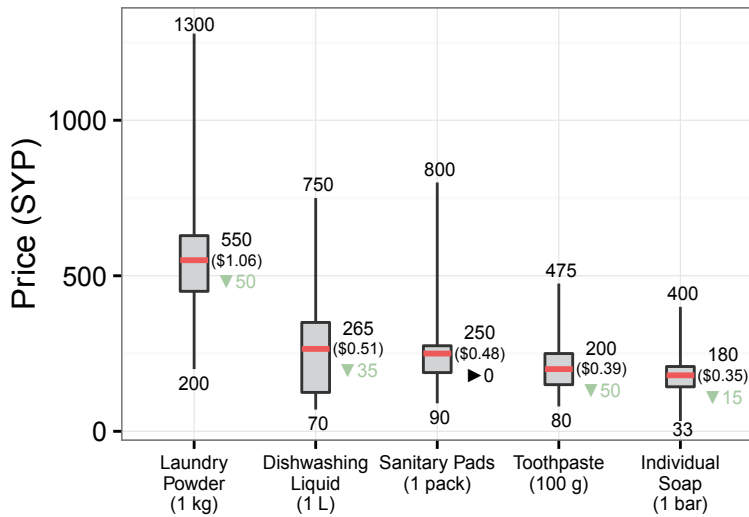
The values of all baskets can be compared using the SMEB map, though caution should be taken to compare only baskets that are missing the same commodities.

**MEDIAN EXCHANGE RATES
JANUARY 2017**
517 SYP/USD
137 SYP/TRY

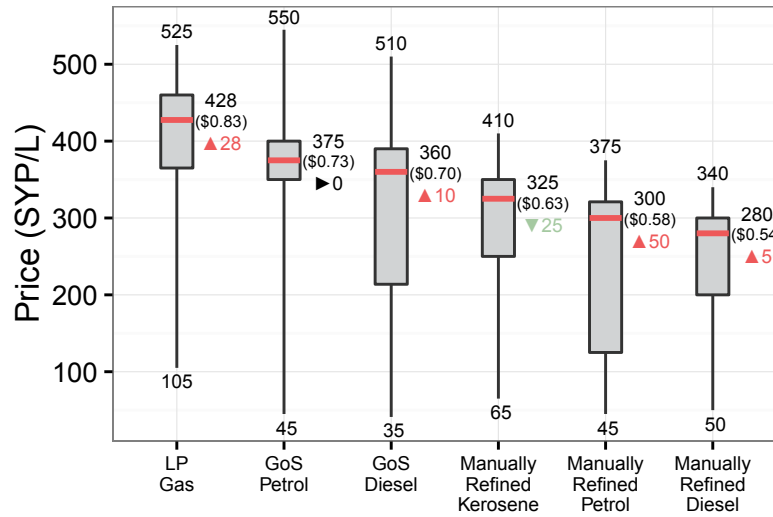
FOOD ITEMS



NON-FOOD ITEMS

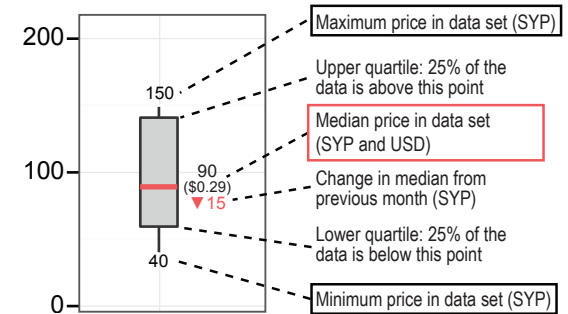


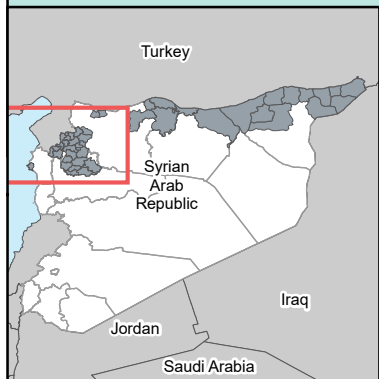
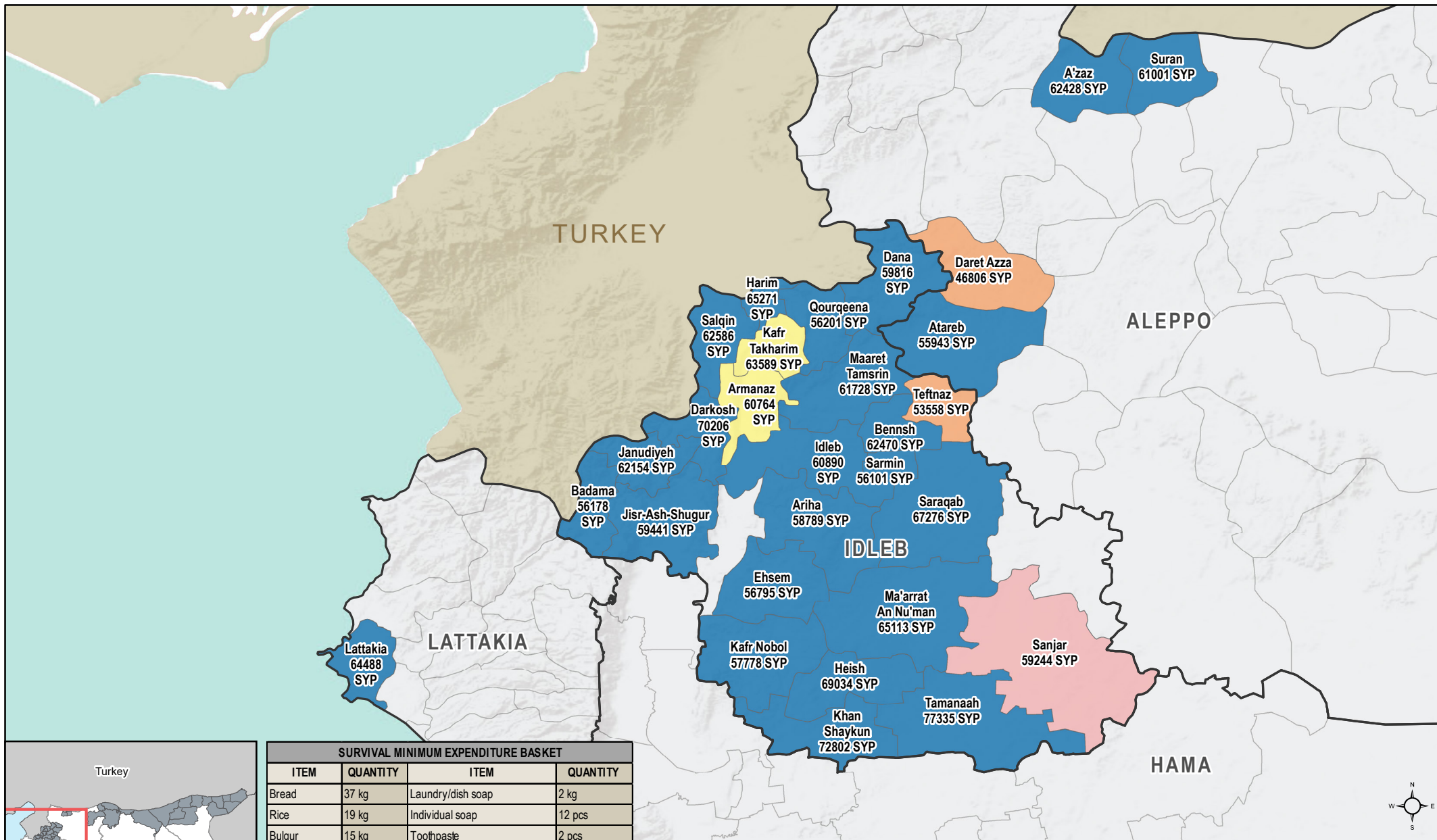
FUEL



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.





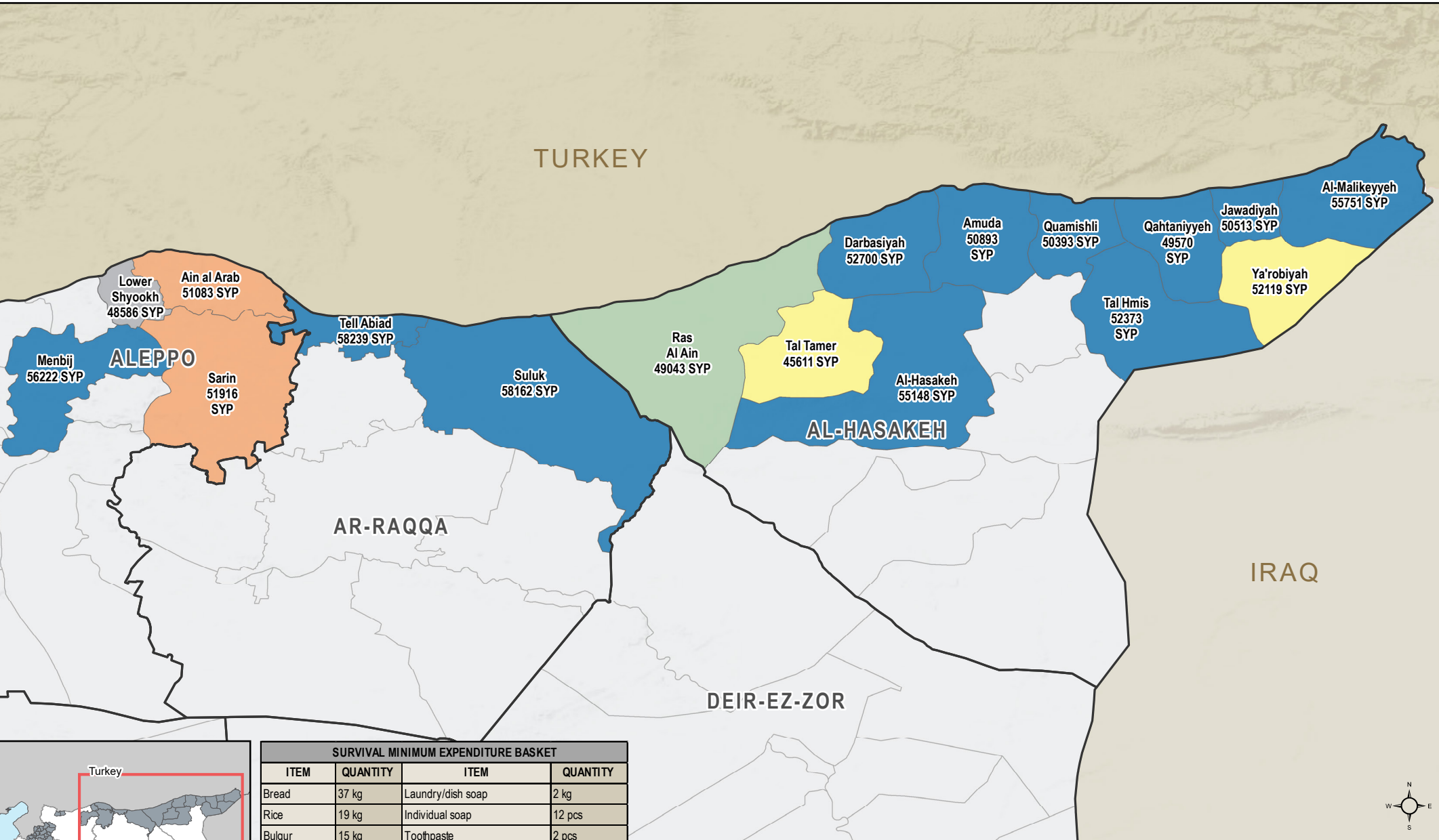
SURVIVAL MINIMUM EXPENDITURE BASKET			
ITEM	QUANTITY	ITEM	QUANTITY
Bread	37 kg	Laundry/dish soap	2 kg
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Eggs	6 kg	Water	2790 L
Salt	1 kg	6% float*	6% total value

* not included in SMEB calculations

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

Data sources:
Boundaries - UN OCHA COD
Market monitoring data - REACH, CBR-TWG
Coordinate System: GCS WGS 1984
File: REACH_SYR_SMEB_Jan2017_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.



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