

Northern Syria Market Monitoring Exercise

August 2015

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 the challenges created by the conflict, the Cash-Based Responses Technical Working Group (CBR-TWG) and REACH conduct monthly monitoring of key markets. In each market, the field teams record the prices and stock levels of selected food and non-food items (NFIs) sold by local traders and retailers. Data collectors also monitor the prices of several types of fuel to understand the availability and pricing of different fuel types. Basic commodities have been identified based on what is typically available, sold and used by an average Syrian household. Many of these items 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 for survival for 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. 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 to guide the implementation of humanitarian cash and voucher programs within those markets.

METHODOLOGY

Between 17 and 23 August 2015, a network of field 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. Ten partners (CARE/Shafak, Concern, GOAL, IRC, Mercy Corps, the Norwegian Refugee Council, People in Need, REACH, Save the Children and Solidarités International) contributed data from 27 subdistricts across Idlib, Aleppo and Al-Hasakeh governorates.

Enumerators were trained on methodology and tools by the REACH assessment team and CBR-TWG members. Each enumerator assessed one to three major markets in their assigned subdistrict, using surveys to elicit information about prices, the availability of stock and the time needed to replace current stocks.

Seven survey forms were deployed on KoBo to capture price and stock information from different types of establishments, including grocery stores, bakeries and fuel traders. Enumerators used the

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 August 2015, two partners scaled back their coverage and one delayed its participation due to security constraints. All of these partners plan to expand their participation in future months if the security context allows.

Data from Qamishli and Janudiyeh were removed from the data set for methodological reasons, as prices there were not collected from a sufficient number of markets. In addition, restocking data from al-Hasakeh governorate was collected using a different methodology and could not be analysed

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 2 wholesalers, and diverse enough to provide a sufficient variety of commodities. The shops surveyed within each market had to be housed in permanent structures and had to sell certain commodities to be eligible for inclusion. Enumerators obtained consent from traders prior to administering each survey.

Following data collection, the REACH assessment team compiled and cleaned all partners' data, normalizing prices, cross-checking outliers and triangulating the results using secondary sources. 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 the data set. In addition, the average cost of an SMEB in each subdistrict was calculated and mapped by the REACH GIS team.

alongside data from other governorates.

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. As the Market Monitoring Exercise grows, aligning the data collection efforts of all participating partners becomes more difficult. CBR-TWG members have sought to overcome these issues by 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 clean and accurate as possible.

ASSESSED MARKETS



SURVIVAL MINIMUM EXPENDITURE BASKET (SMEB) CONTENTS

	Item	Quantity
Food Items	Bread	37 kg
	Bulgur	15 kg
	Chicken	4 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	25 L
	(manually refined)	
Water	Water*	2790 L
Other	6% float*	6% total value

* Starred items were excluded from SMEB calculations.

AUGUST 2015: NORTHERN SYRIA CONTEXT

The governorate of Aleppo has been the focus of international headlines throughout the month of August, as discussions continue surrounding the creation of a “buffer zone” extending from Suran in the west to Jarablus in the east. Rival armed groups have been trying to consolidate their control over this area, with heavy fighting taking place in the villages surrounding Mare. As a result, CBR–TWG partners’ plans to collect price data in Mare and the nearby city of Tall Refaat had to be abandoned.

In Idleb governorate, the Syrian government and opposition forces continued to clash over the government-held villages of al-Fuah and Kafra, just northeast of Idleb in the heart of the assessed area, as well as over the Kwaireh military airport east of Ma’arrat an-Numan. The Kwaireh conflict has severed several supply routes leading into Ma’arrat an-Numan, making it difficult to restock many items. Meanwhile, the bombing of Bennis and Maaret Tamsrin has reportedly abated and residents and traders are beginning to return, which has made it possible to reincorporate Maaret Tamsrin into the August Market Monitoring Exercise. In al-Hasakeh governorate, however, weeks of non-stop fighting among non-state actors and the Syrian government, as well as a suicide bombing in Qamishli, forced a premature halt to CBR–TWG data collection in that city and several others.

In late July, opposition-held areas of eastern Aleppo unofficially abandoned the Syrian pound and adopted the Turkish lira in its place. ATMs dispensing lira have been set up throughout eastern Aleppo to help residents switch currencies. The eventual aim is to implement the Turkish lira as the primary currency throughout opposition-held northern Syria. CBR–TWG partners report that some shops in the city of Teftnaz and elsewhere have already begun to conduct business in lira.

MAIN PRICE CHANGES

**EGGS, TOMATO PASTE, BULGUR,
POTATOES, GOVERNMENT DIESEL**

COMMODITY PRICE CHANGES

On 20 August 2015, at the midpoint of the data collection period, the price of the US dollar on Aleppo’s informal currency exchange market was 313 Syrian pounds (SYP), a 4% rise from 300 SYP/USD in mid-July. Despite this slight rise, Aleppo’s unofficial exchange rates for most global currencies have remained relatively stable since late May. Rates for the Turkish lira (TRY) have been more volatile, but have for the most part hovered around 110 SYP/TRY, hitting 108 SYP/TRY on 20 August. This trend held steady even as the value of the lira continued to slide throughout August.

The prices of most food items remained steady during the month of August, with eggs and tomato paste standing out as the major exceptions. The median price of eggs rose from 500 to 650 SYP (1.67 to 2.08 USD, 30%), while that of tomato paste fell from 425 to 350 SYP (1.42 to 1.12 USD, 18%), receding after its earlier rise in July. Bulgur and potatoes also became notably more expensive; the median price of bulgur rose by 41% (78 to 110 SYP, 0.26 to 0.35 USD), and that of potatoes rose by 46% (65 to 95 SYP, 0.22 to 0.30 USD). The price of chicken in most subdistricts fell slightly in August after rising rapidly throughout July, though localised price spikes kept the median roughly even (500 SYP in August vs. 490 SYP in July). Vegetable oil and sugar exhibited similar localised spikes.

Non-food items, too, have remained surprisingly stable after the volatility of previous months. The median price of

MAIN SHORTAGES

**BREAD,
KEROSENE**

toothpaste has fallen slightly from 140 to 125 SYP (0.47 to 0.40 USD, 11%). Meanwhile, the maximum recorded prices rose greatly for sanitary pads (175 to 375 SYP, 0.58 to 1.20 USD, 114%) and laundry soap (379 to 550 SYP, 1.26 to 1.76 USD, 45%), though this was driven largely by higher local prices in sub-districts that have been newly added to the Market Monitoring Exercise.

Fuel prices seem to have stabilised after the extreme price swings of late June and early July. Prices tend to cluster tightly around the medians, which have changed little since July, with localised shortages and subsidies creating some distant outliers. The minimum reported prices of all types of fuel have dropped, often dramatically, due to the expansion of the Market Monitoring Exercise into al-Hasakeh governorate and Ain al-Arab, where local councils generally subsidise the cost of fuel. The only type of fuel to exhibit price instability was government diesel; this commodity remains hard to find in opposition-held areas, but even so, the August median price plummeted from 312 to 135 SYP per litre (1.04 to 0.43 USD, 57%).

ISSUES OF AVAILABILITY

Two-thirds of SMEB commodities were found in all markets assessed in August. Of the remaining one-third, most were missing from only one or two of the assessed subdistricts. However, the bread shortages observed in July persisted into August. Enumerators did not find bread for sale in any assessed market in 8

of 27 sub-districts; of these, 6 sub-districts lacked only bread and no other commodity. Kerosene shortages were observed in Harim, Ain al-Arab, Lower Shyookh and Qahtaniyah sub-districts, but could not be called widespread, in contrast to July when kerosene was unavailable in nearly two-thirds of assessed subdistricts.

Other commodities that were locally unavailable included bulgur in Ma’arrat an-Numan, tomato paste and eggs in Ain al-Arab and Lower Shyookh, and all types of soap in the city of Aleppo. Overall, there were 15 assessed subdistricts where all SMEB commodities were available.

RESTOCKING TIME

Apart from localised shortages, supply chains throughout the assessed area seemed to be functioning well, with markets retaining adequate stock of most available items and reporting median restock times of 1 day. The situation in Ain al-Arab and Lower Shyookh subdistricts, however, was very different. Enumerators there found shortages of 10 commodities and median restock times of between 3 and 7 days for all remaining food items, NFIs and types of fuel. Traders in Ma’arrat an-Numan also reported difficulty restocking many items in a timely manner, including flour, rice, tomato paste, eggs, vegetable oil, toothpaste, and government petrol and diesel.

In general, traders across the assessed area reported that they had the most difficulty restocking flour. Median flour restock times were greater than 3 days in Idleb, Kafr Takharim and Armanaz. Enumerators also observed low potato stocks in Teftnaz, Maaret Tamsrin, Kafr Takharim and Armanaz; in all four areas, traders estimated that their remaining stock of potatoes would last them for fewer days than it would take them to restock.

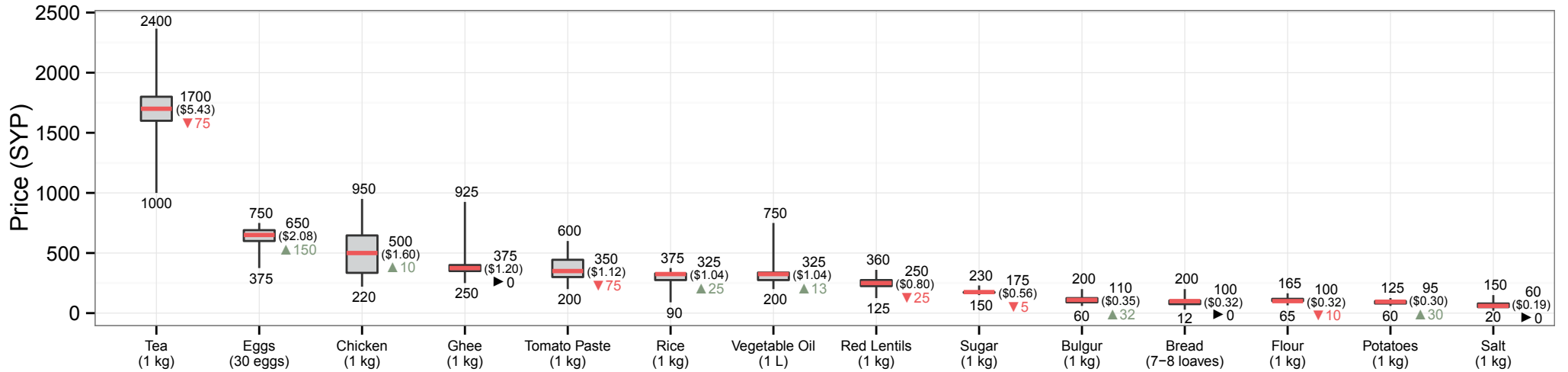
ALEPPO EXCHANGE RATE

20 AUGUST 2015

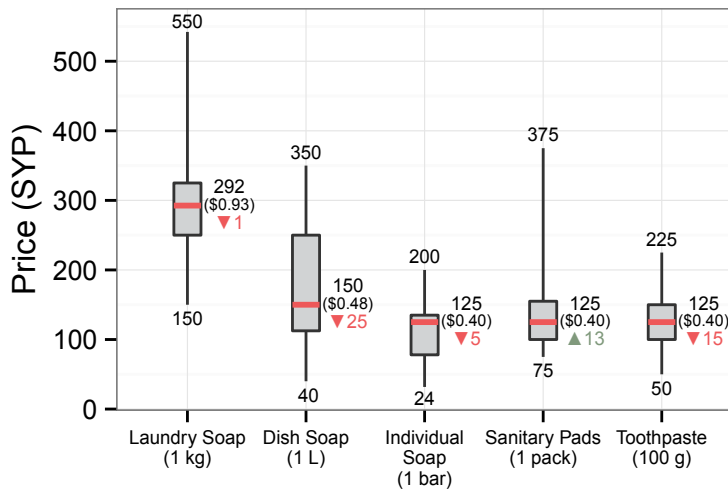
313 SYP/USD

108 SYP/TRY

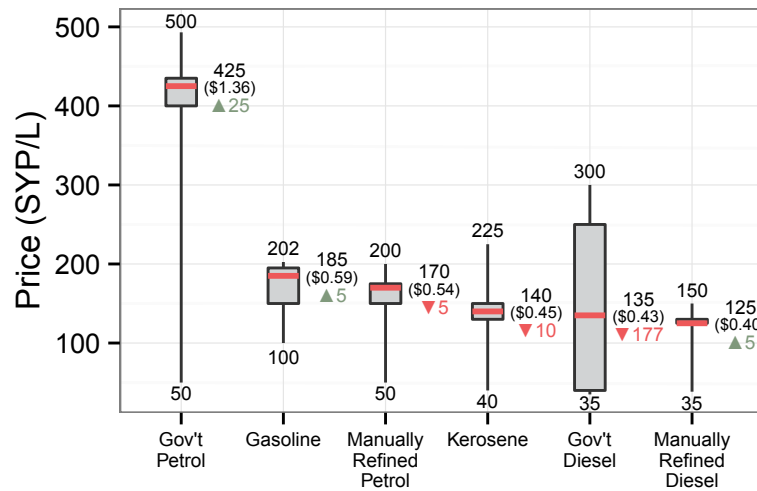
FOOD ITEMS



NON-FOOD ITEMS

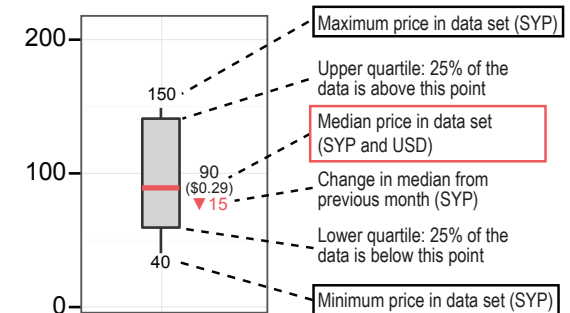


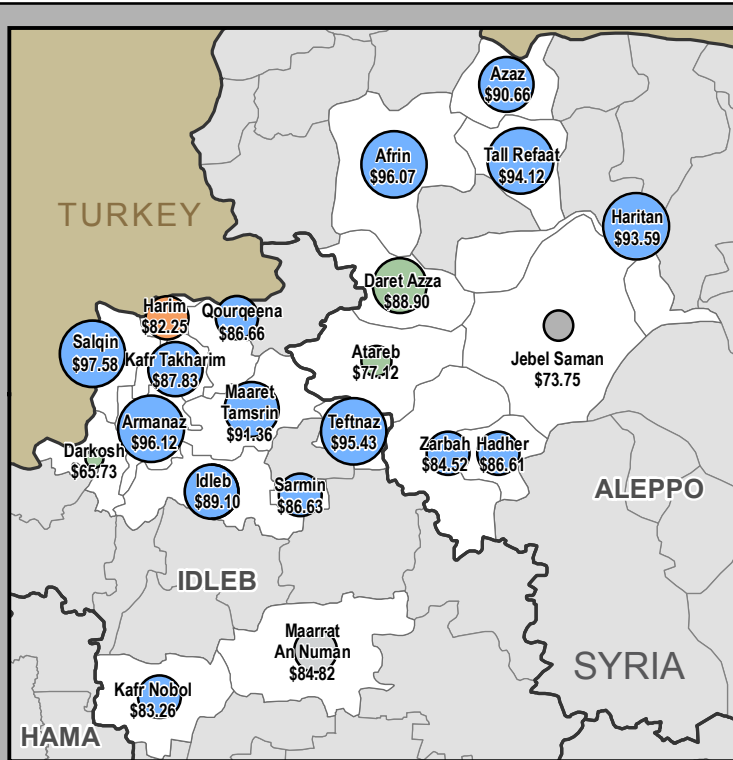
FUEL



How to read a box plot

Box plots provide a variety of data to aid in understanding the distribution of the data set. All price figures in the box plot are in USD.





This map illustrates the price and availability of a range of basic commodities in 27 sub-districts of Idlib, Aleppo and al-Hasakeh governorates in northern Syria. Primary data was collected by CBR-TWG members from 17-23 August 2015, on behalf of the Cash-Based Responses Technical Working Group, in order to understand the impact of the ongoing conflict on markets in Syria and inform the implementation of humanitarian cash and voucher programs within those markets.

The assessment monitored the prices of basic food and non-food items, selected based on what is typically available, sold and used by an average Syrian household. These items form a Survival Minimum Expenditure Basket (SMEB), detailed in the table below, which represents the minimum culturally adjusted set of commodities required to maintain a six-person household for a one-month period. For the purposes of this assessment, fresh vegetables and water are not included in the calculations, as prices vary considerably according to source and season.

Based on the data collected, this map shows the calculated price of an SMEB for each of the assessed sub-districts. The majority of items could be found in all assessed markets, but shortages of some items mean that not all baskets can be directly compared.

SURVIVAL MINIMUM EXPENDITURE BASKET	
Item	Quantity
Bread	37 Kg
Rice	19 Kg
Bulgur	15 Kg
Ghee	7 Kg
Sugar	5 Kg
Tomato paste	6 Kg
Chicken	4 Kg
Eggs	6 Kg
Salt	1 Kg
Laundry/dish soap	2 Kg
Individual soap	12 Pcs
Toothpaste	2 Pcs
Sanitary pads	4 packs of 10
Kerosene	
(manually refined)	25 L
6% float	6% total value



- Governorate Capital
- Complete SMEB
- SMEB excluding kerosene only
- SMEB excluding bread only
- SMEB excluding other items
- Roads
- ▭ Sub Districts
- ▭ Governorates

Data sources: OCHA COD, REACH,
© OpenStreetMap contributors

Coordinate System: GCS WGS 1984
File: REACH_SYR_SMEB_Aug2015_A4_V2
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.