

Northern Syria Market Monitoring Exercise

April 2016

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 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. 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 outlines the minimum culturally adjusted group of items required to support 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, as well as of water trucking expenses 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 11 and 17 April 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. Seven partners (CARE/Shafak, Concern, GOAL, Mercy Corps, People in Need, REACH and Solidarités International) contributed data from 28 subdistricts across Idlib, Latakia, Aleppo, ar-Raqqa, Deir ez-Zor 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

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 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, Qamishli and Deir ez-Zor, where some neighbourhoods could not be surveyed.

In this round, restrictions on the use of mobile devices for data collection imposed by authorities in parts of northern Idlib governorate meant that markets in those areas could not be directly assessed using the KoBoCollect app. Instead, data

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

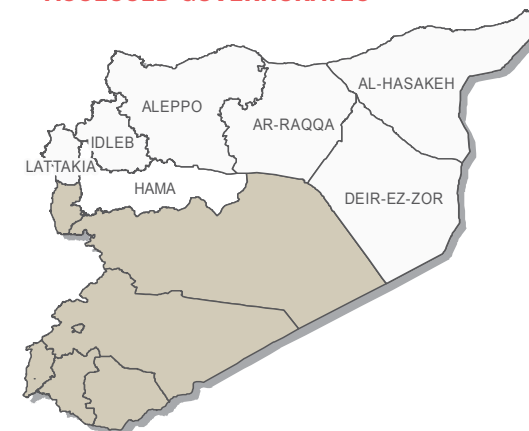
Enumerators were trained on methodology and tools by REACH and CBR-TWG members. Each enumerator assessed three to five shops of each type in the main market in their assigned subdistrict, using surveys to collect information about prices, current product inventory and the time needed to replace current stocks. In subdistricts where direct surveying by enumerators was not possible, such as Latakia, ar-Raqqa, and Deir ez-Zor, data collection was conducted directly 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

was collected using paper forms and entered into KoBo afterwards. Operational difficulties unrelated to security resulted in a loss of coverage for four subdistricts in southern Idlib and northern Hama governorates (Kafr Nobol, Khan Shaykun, Madiq Castle and Kafr Zeita). For methodological reasons, restocking data from al-Hasakeh governorate could not be analysed alongside data from other governorates and had to be excluded.

Coordinating a cross-border price monitoring exercise via remote management is inherently challenging. 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.

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.

April 2016: NORTHERN SYRIA CONTEXT

For much of March and April, a partial ceasefire in place since February 27 continued to shape the humanitarian situation throughout northern Syria. Although fighting continued unabated in some areas, elsewhere, the lull in clashes and airstrikes led to increased humanitarian access and periods of relative quiet for civilians in the affected areas.

During April, however, the ceasefire began to break down. Heavy fighting near the Turkish border east of A'zaz led to mass displacement and the evacuation of several IDP camps in the vicinity, placing more stress on already overburdened infrastructure and markets in the area. Furthermore, airstrikes on markets in Ma'arrat an-Nu'man and Kafr Nobol, resurgent urban warfare in Qamishli and a wave of airstrikes in Aleppo city resulted in the suspension of Syrian peace talks in Geneva.

In addition to these security challenges, CBR-TWG members this month faced increased suspicion from local authorities that made it difficult to collect data in certain subdistricts. In particular, one partner working in Jawadiyah (al-Hasakeh governorate) was unable to negotiate humanitarian access to the area, and two working in northern Idlib governorate were restricted from collecting data using GPS-enabled mobile devices.

COMMODITY PRICE CHANGES

During the month of April, US dollar exchange rates across northern Syria topped 500 SYP/USD for the first time since the start of the conflict. The median informal US dollar sell rate was 514 SYP/USD, up from 465 SYP/USD in March. This represented a

MEDIAN EXCHANGE RATES

514 SYP/USD
180 SYP/TRY

MAIN PRICE CHANGES

FRESH VEGETABLES, TEA, CHICKEN, FUEL

10.5% rise since March and a 29.1% rise since January, suggesting that inflation has accelerated more quickly during the first four months of 2016 than at any point in 2015. Local exchange rates ranged from 505 to 522 SYP/USD. As for the Turkish lira, the median sell rate in April was 180 SYP/TRY, representing a still larger rise of 37.4% since January; local rates clustered more tightly, ranging from 175 to 182 SYP.

Food prices were unusually volatile, with more than half of monitored food items rising in price in both Syrian pounds and US dollars from March to April. The main standout was chicken, the median price of which increased from 700 to 950 SYP (1.51 to 1.85 USD, 35.7%); frequent shortages of chicken were also observed across northern Syria, implying that this price spike is due largely to difficulties in supply. The median prices of eggs (825 to 950 SYP, 1.77 to 1.85 USD, 15.1%) and sugar (275 to 340 SYP, 0.59 to 0.66 USD, 23.6%) also increased sharply, as did that of tea (2,400 to 2,700 SYP, 5.16 to 5.25 USD, 12.5%), though tea prices tend to be less stable month to month than those of any monitored commodity. At the same time, the median prices of many staple items, including flour, bread, salt, bulgur and rice, rose modestly or even fell, while those of fresh vegetables varied widely. Localised price spikes were evident as well, including tomato prices in ar-Raqqa that rose as high as 1500 SYP per kilogram.

Changes in NFI prices were far more predictable. The median prices of all hygiene NFIs rose by between 25 and 50 SYP, which resulted in either no change or a slight rise in US dollar prices. The maximum prices for laundry soap, individual soap bars and sanitary pads, however, were markedly higher than in March due to localised price spikes.

MAIN SHORTAGES

KEROSENE, WATER, CHICKEN

After a month of relative stability, the price of most fuels dropped during April by between 20 and 100 SYP, with manually refined petrol and kaz experiencing particularly large decreases. The price of government petrol, on the other hand, rose by 90 SYP (285 to 375 SYP, 0.65 to 0.73 USD, 31.6%) due mainly to difficulty of access in Idlib and Aleppo governorates. It should be noted that the apparent large decrease in the median price of government diesel can largely be attributed to idiosyncrasies of the March and April data sets and do not reflect genuine market disruptions in either month.

The median price to deliver 1 litre of water via private water trucking services was 0.34 SYP, representing a slight drop from 0.38 SYP in March. These prices have remained largely stable since the beginning of 2016, but functioning water trucking services have become rarer as the security context has become more dangerous. As in the past, prices for water delivery were highest by far in Deir ez-Zor city, with one litre of water costing 1.25 SYP; the lowest price of 0.13 SYP/L was found in Idlib city.

In April 2016, the median price of a 150 x 200cm winter blanket with a minimum thickness of 5mm was 4500 SYP, up from 4,000 SYP in March. Prices ranged widely from 1,500 to 10,000 SYP depending on the subdistrict and the types of blankets available in the market. Despite the warm weather, winter blankets meeting the specifications were for sale in nearly two-thirds of assessed markets.

AVAILABILITY

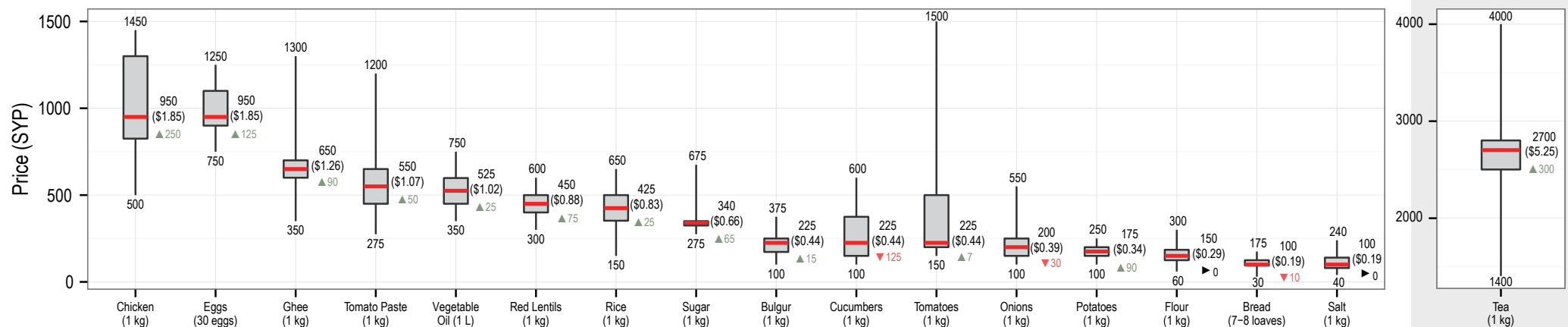
In contrast to March, shortages of SMEB commodities were frequent and widespread during the month of April. Chicken was not present in

assessed markets in eight subdistricts, including three in al-Hasakeh governorate and another five that stretched westwards along the Turkish border. Fresh tomatoes were largely unavailable in five subdistricts (Amuda, Qahtaniyeh, al-Malikeyyeh, Lower Shyookh and Afrin); private water trucking services, too, were largely unavailable in five subdistricts (Afrin, A'zaz, Atareb, Teftnaz and Kafr Takharim), and kaz was unavailable in another four (A'zaz, Atareb, Ain al-Arab and Lower Shyookh). Data collectors observed localised shortages for an additional 10 SMEB commodities.

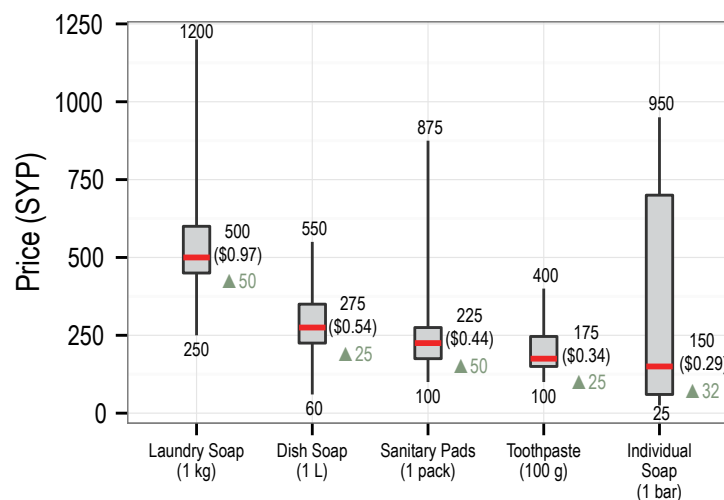
SMEBs

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. Because of the high frequency of shortages in April, both localised and widespread, complete SMEBs could be assembled for only 12 of 28 assessed subdistricts. The most expensive complete SMEBs were in ar-Raqqa (74,678 SYP, 145.11 USD) and Deir ez-Zor (74,585 SYP, 145.29 USD), representing dramatic rises of 25.1% and 13.9% respectively since March. The least expensive complete SMEB was in Maaret Tamsrin and cost 46,960 SYP (91.36 USD), which in January would have been one of the highest complete SMEB prices in Syria. The values of incomplete baskets can be compared using the SMEB map, though caution should be taken to compare only baskets that are missing exactly the same commodities.

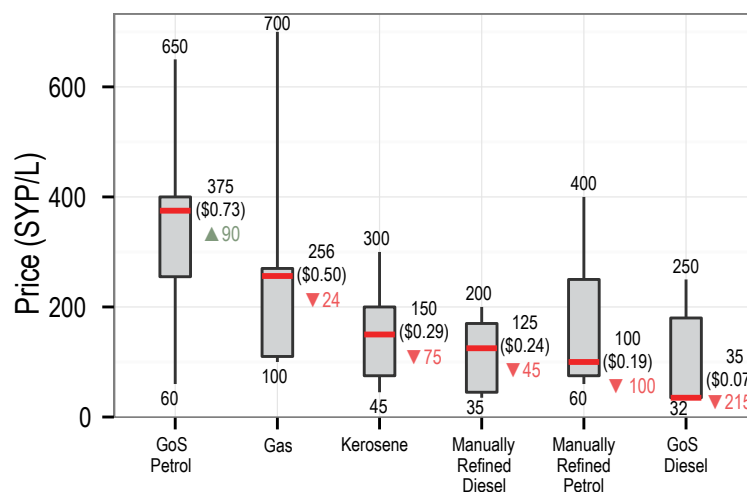
FOOD ITEMS



NON-FOOD ITEMS

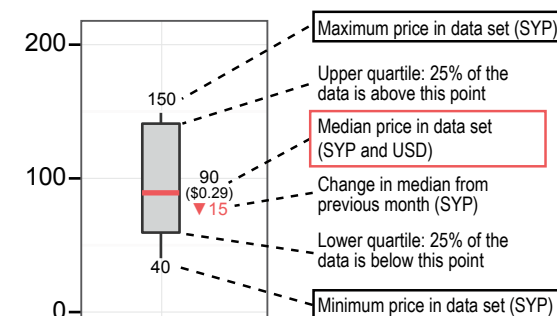


FUEL



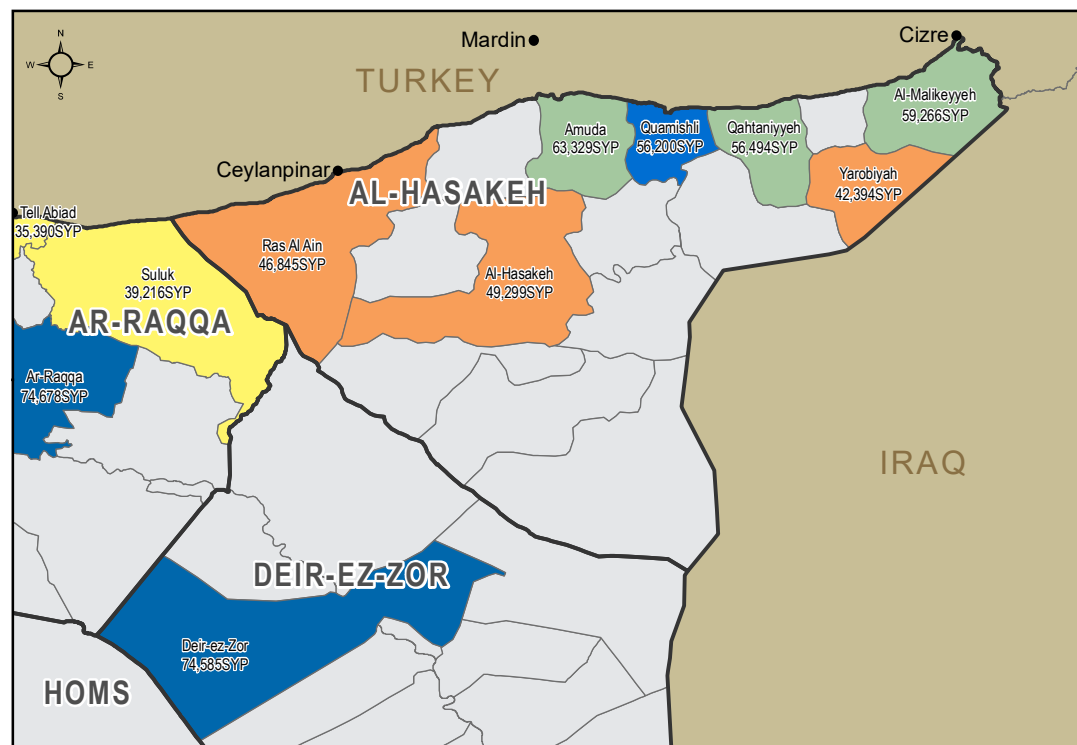
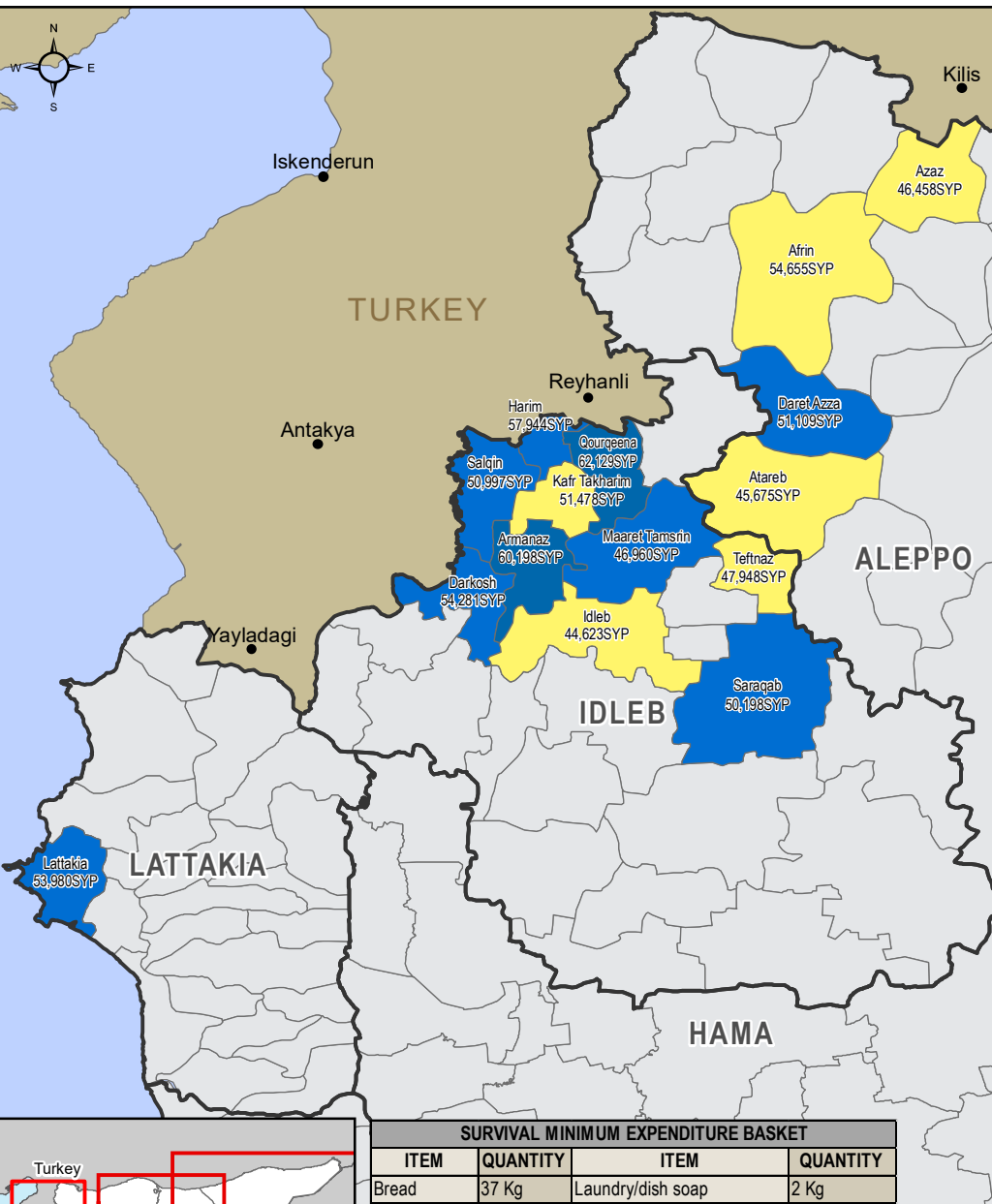
How to read a box plot

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 - Survival Minimum Expenditure Basket (SMEB) Cost

Market Monitoring - April 2016



- SMEB Complete High Cost
- SMEB Complete Low Cost
- SMEB Excluding Chicken
- SMEB Excluding Tomatoes
- SMEB Incomplete
- Subdistricts Not Surveyed

Data sources:
Boundaries - OCHA COD, USDS HIU
Market monitoring data - REACH, CBR-TWG

Coordinate System: GCS WGS 1984
File: 20160422_REACH_SYR_SMEB_A4
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.