

# Northwest Syria | Joint Market Monitoring Initiative (JMMI)

1-8 April 2024

## MARKET OVERVIEW

### INTRODUCTION

To facilitate humanitarian cash programming, the Northwest of Syria Cash Working Group (NWS CWG), in collaboration with local and international NGOs, carries out a monthly Joint Market Monitoring Initiative in Northern Syria. This initiative assesses the availability and prices of basic commodities typically sold in markets and consumed by the average Syrian household. These include food, water, and non-food items such as fuel, shelter and clothing items.

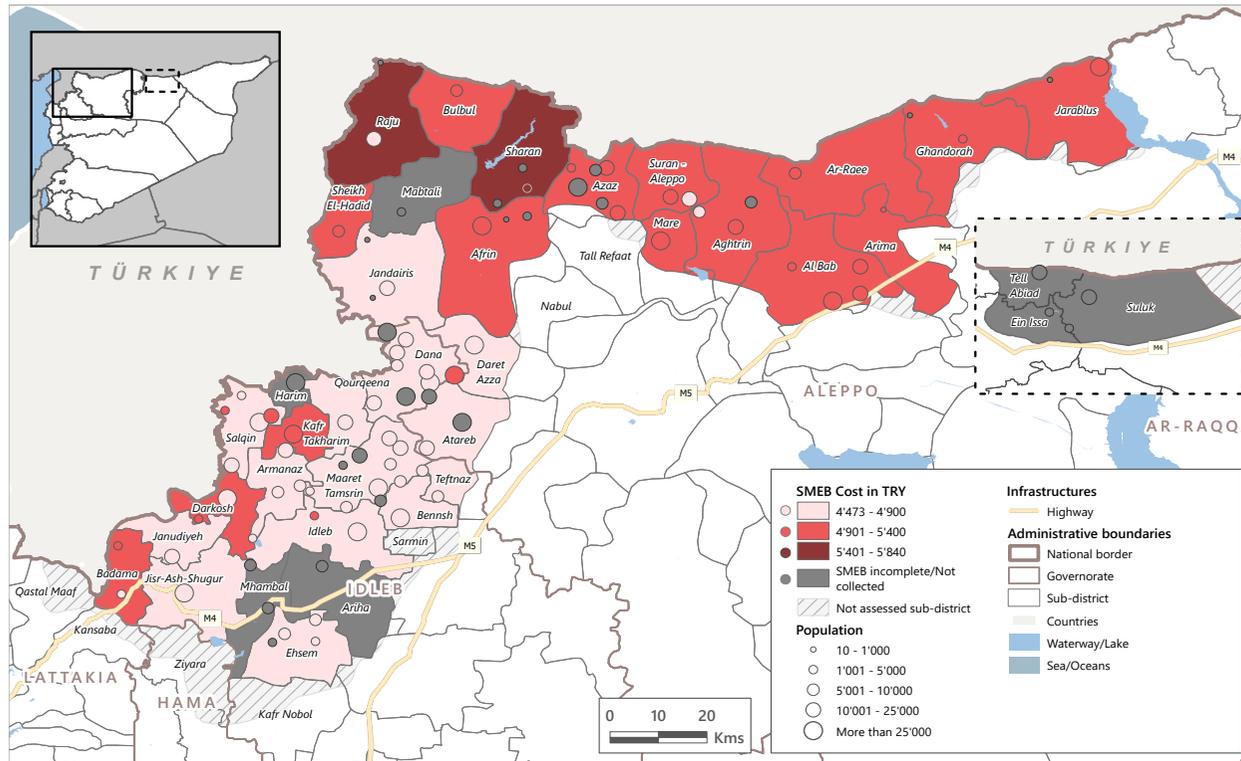
Among these, 18 components (measured by 24 items) form the Survival Minimum Expenditure Basket (SMEB), which signifies the minimum culturally adjusted items necessary to sustain a household of six individuals for a month.

- 11 Participating agencies
- 3 Assessed governorates
- 38 Assessed sub-districts
- 93 Assessed communities
- 3558 Shops surveyed

### KEY INDICATORS

<p><b>Cost of SMEB</b></p> <p>4,916 TRY <b>+5%</b> ▲</p> <p>150 USD <b>+1%</b> ▲</p>	<p><b>Cost of SMEB Food</b></p> <p>3,530 TRY <b>+3%</b> ▲</p> <p>108 USD <b>0%</b></p>	<p><b>USD/TRY</b></p> <p>informal exchange rate</p> <p>33 TRY <b>+3.7%</b> ▲</p>
--	--	--

### Cost of the SMEB, Sub-districts in Northwest Syria, TRY



### KEY FINDINGS

- Between March and April 2024, the regional median informal exchange rate in NWS increased by 3.7%, which continued to influence the prices of basic commodities, leading to noticeable cost increases.
- The prices of the SMEB food component generally increased across NWS between March and April 2024. In Aleppo, prices rose by more than 5%, while in Idlib governorate and most assessed areas in Northern Ar-Raqqa, there was an almost uniform increase of over 3%.
- Vendors continue to face significant challenges, with 45% reporting the most frequent issue to be price inflation. Additionally, 4% of vendors reported difficulties due to closed border crossings, and supply shortages due to lack of funds to restock.

## Survival Minimum Expenditure Basket (SMEB)

The SMEB is a tool designed by the Cash-based responses Technical Working Group (CBR-TWG) for Northern Syria. The [first version of the SMEB](#) was developed in 2014 and formed the basis of the northern Syria joint market monitoring a partnership between CBR-TWG member NGOs & REACH. The current SMEB is based on the [2017 Revision](#). The SMEB is designed as an indicator of the cost of the minimum, culturally-appropriate items that a family of 6 needs to survive for one month, while meeting basic standards for nutritious food, water use and hygiene in Northern Syria. The cost of the SMEB can be used as a proxy for the financial burdens facing households in different locations.

### SMEB Contents

<b>Food</b>	
Bread	37 kg
Bulgur	15 kg
Chicken	6 kg
Eggs	6 kg
Ghee (kg) / Vegetable oil (L)	7kg / L
Red Lentils	15 kg
Rice	19 kg
Salt	1 kg
Sugar	5 kg
Tomato paste	6 kg
Vegetables	12 kg
<b>Hygiene (NFI)</b>	
Bathing soap	12 bars
Laundry / dish soap	3 kg
Toothpaste	200 kg
Sanitary pads	4 packs of 10
<b>Other items</b>	
Cooking fuel	15 L
Water trucking	4500 L
Phone data	1 GB
Float (other costs)	7.5 % of total

## Exchange rate trends

- Between March and April 2024 the regional median informal exchange rate increased in NWS (3.7% depreciation of the Turkish lira). The depreciation of the Turkish lira significantly impacts northwest Syria, where many depend on imports from Türkiye and humanitarian aid linked to the Turkish economy. As the lira weakens, the cost of goods and services rises, leading to increased inflation and reduced purchasing power. This exacerbates poverty and makes it harder for families to afford basic necessities. Additionally, the local economy suffers as trade opportunities diminish and unemployment rises, further straining the region.<sup>1</sup>
- As humanitarian funding decreases, organizations cut services, leaving many without crucial support. The depreciating lira deepens poverty and inequality, affecting health and well-being, especially for children and the elderly. Although the depreciation rate has recently slowed after mid-2023's volatility, the lingering effects continue to strain northwest Syria, exacerbating challenges for displaced populations and host communities.<sup>1</sup>
- The calculated USD SMEB price, converted using median exchange rates, rose only slightly for the second consecutive month due to the relative stability of the exchange rate compared to the previous year.

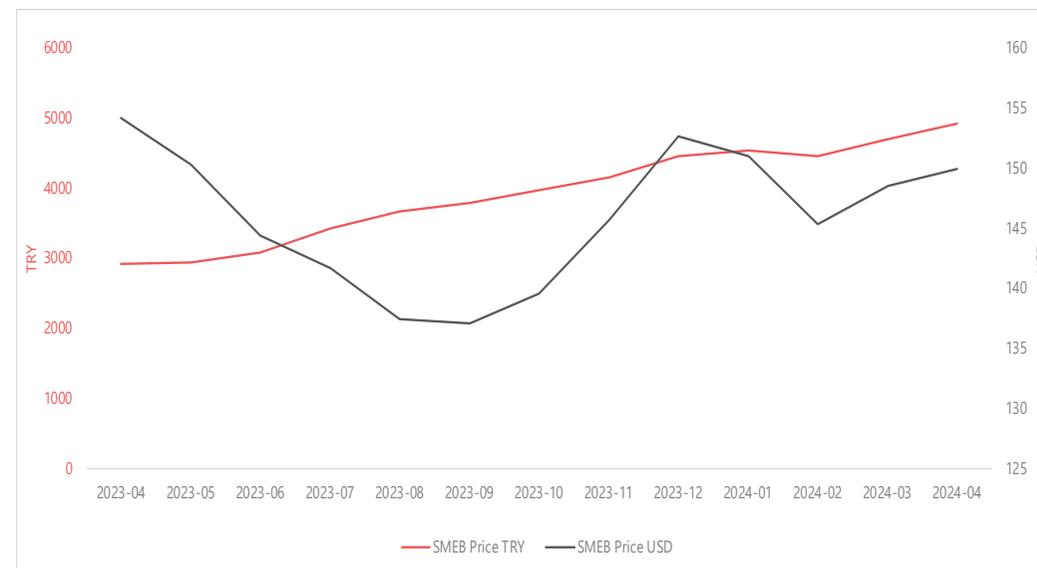
**67% ▼**

The value of the TRY has depreciated by 67% in the past year.

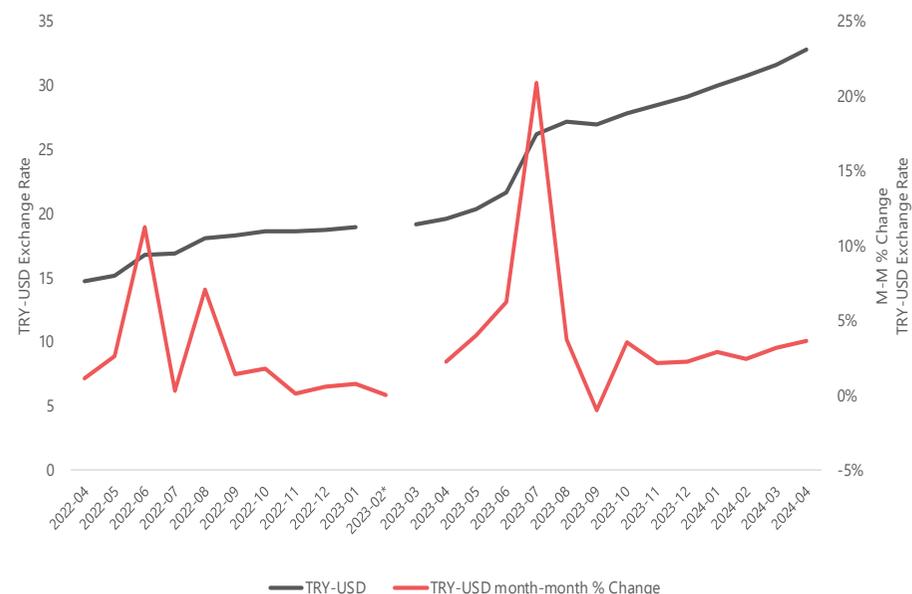
**68% ▲**

The cost of the SMEB in TRY has increased by 68% in the past year.

## Regional median SMEB prices, TRY and USD\*

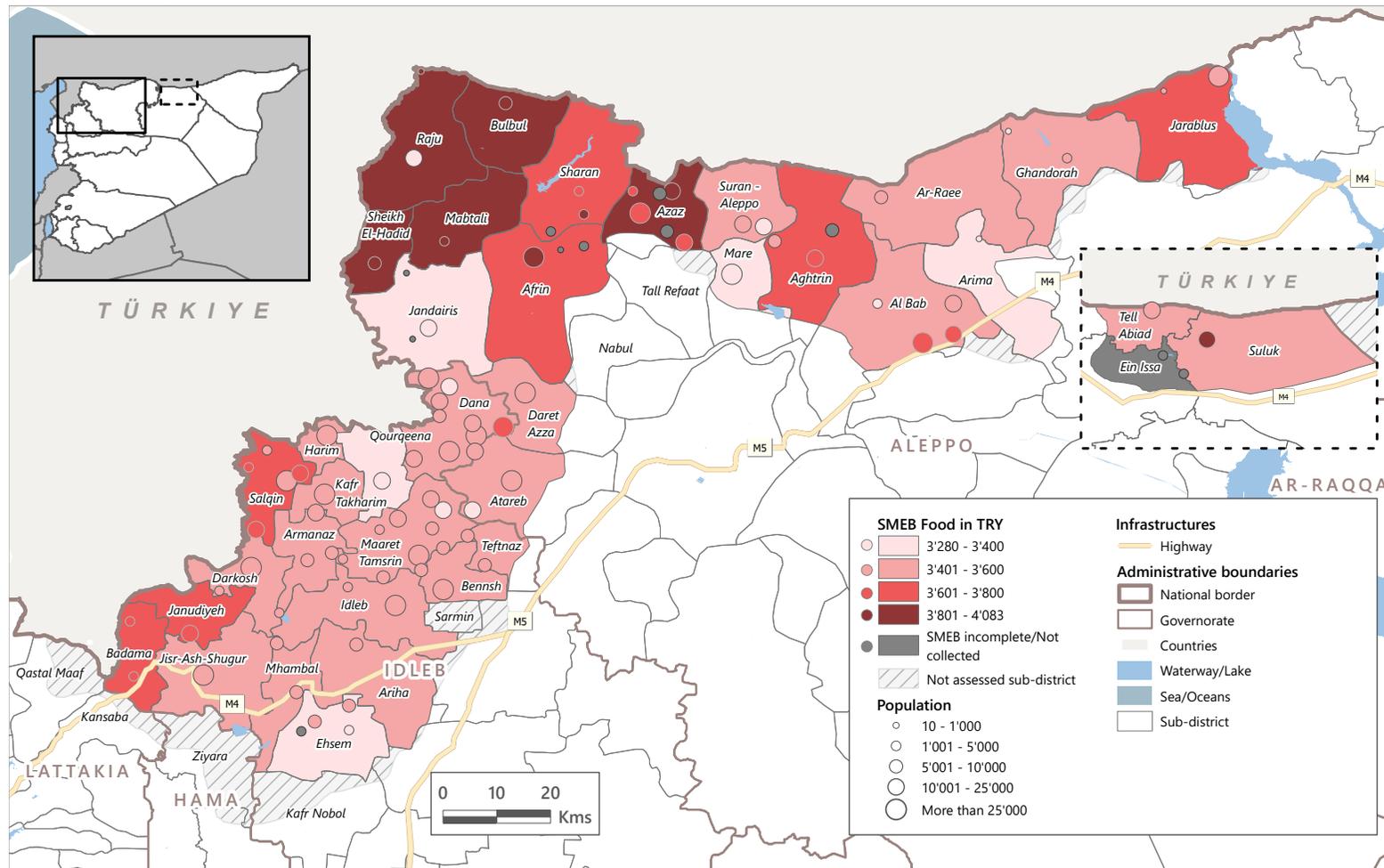


## Regional median USD/TRY informal exchange rate trends\*



\* No data was collected in February 2023 due to the earthquakes.

### SMEB food prices, TRY



### Price of SMEB Food, sub-district, TRY

Location	Median Price TRY	Change since Mar 2024
<b>Aleppo governorate</b>		
Afrin	3,714	+7% ▲
Aghtrin	3,650	+2% ▲
Al Bab	3,559	+8% ▲
A'rima	3,281	+6% ▲
Ar-Ra'ee	3,446	+4% ▲
Atareb	3,410	+7% ▲
A'zaz	3,802	+8% ▲
Bulbul	3,880	+5% ▲
Daret Azza	3,513	+5% ▲
Ghandorah	3,513	+2% ▲
Jandaris	3,387	-1% ▼
Jarablus	3,641	+1% ▲
Ma'bтали	3,905	+13% ▲
Mare'	3,355	0%
Raju	3,869	+8% ▲
Sharan	3,795	+18% ▲
Sheikh El-Hadid	3,899	+7% ▲
Suran	3,411	0%
<b>Idleb governorate</b>		
Ariha	3,424	+4% ▲
Armanaz	3,491	+7% ▲
Badama	3,689	+4% ▲
Bennsh	3,583	+5% ▲
Dana	3,527	+2% ▲
Darkosh	3,600	+5% ▲
Ehsem	3,392	-2% ▼
Harim	3,530	+3% ▲
Idleb	3,499	+3% ▲
Janudiyeh	3,620	+1% ▲
Jisr-Ash-Shugur	3,474	+1% ▲
Kafr Takharim	3,591	+8% ▲
Maaret Tamsrin	3,454	+2% ▲
Mhambal	3,519	+5% ▲
Salqin	3,609	+6% ▲
Teftnaz	3,579	+5% ▲



85%

KIs in 85% of communities assessed in the Humanitarian Situation Overview of Syria during March round reported that food markets were functioning.<sup>2</sup>



86%

of HSOS assessed communities in April, reported that the most commonly cited challenge was the high cost of food in markets. This is particularly notable given that markets remained the primary food source for most households.<sup>2</sup>

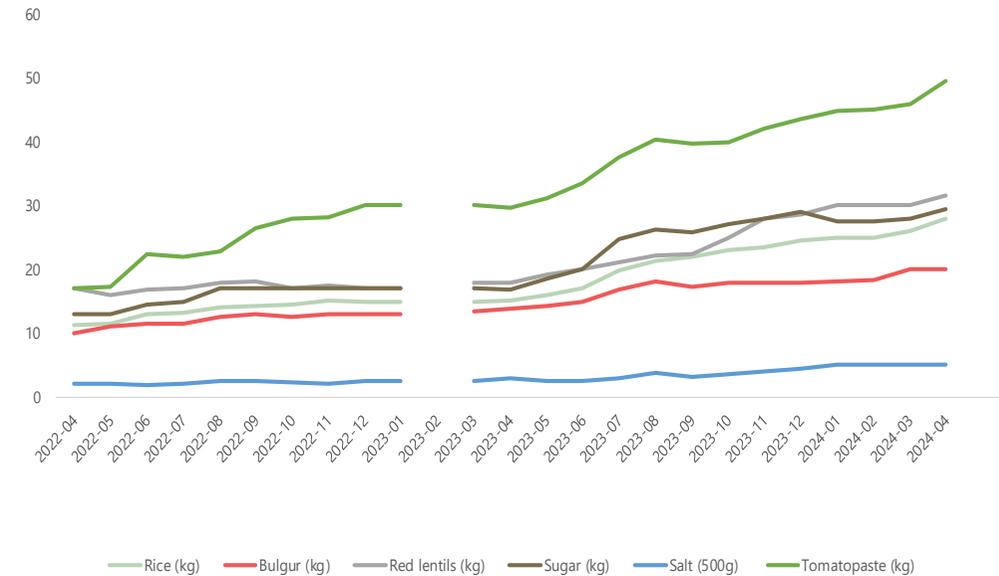
## Food price trends

The prices of the SMEB food component generally rose across NWS between March and April 2024, showing uniform increases in most assessed areas in Northern Aleppo, Idlib, and Ar-Raqqa. While certain sub-districts such as Sharan and Ma'bтали experienced notable price hikes during this period, prices elsewhere remained relatively consistent. This indicates that broader structural socio-economic factors like currency depreciation, limited local production, and low purchasing power are influencing prices more than localized supply chain dynamics.

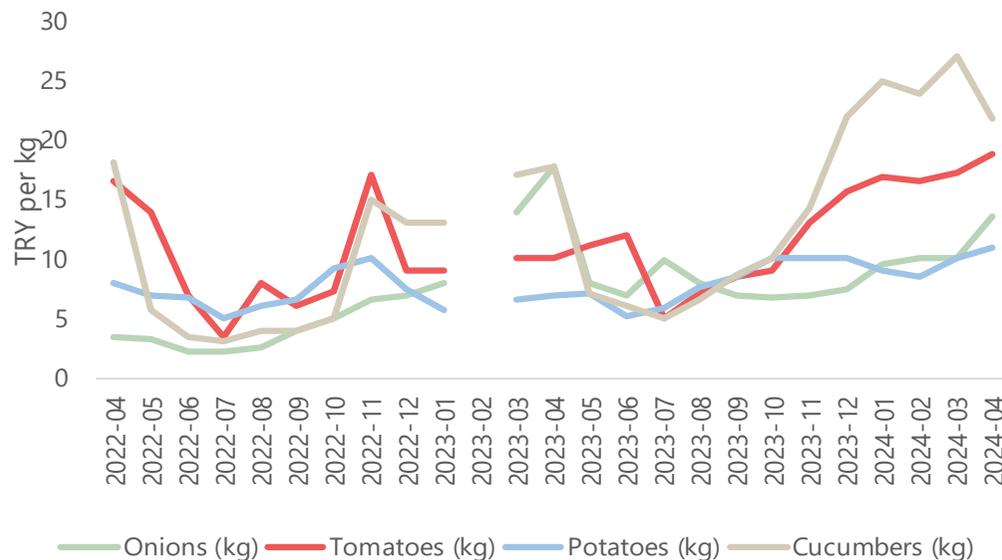
The regional median price of bulk food items showed an increase between March and April 2024, consistent across assessed areas. Among the monitored bulk food items, red lentils, a significant protein source, saw a notable increase of 40% over the past six months.

Most monitored fresh vegetables increased in price between March and April 2024. However, cucumbers decreased by 19%, though they still cost nearly three times what they did six months ago. Additionally, tomato prices have more than doubled over the same period.

## Regional median price of bulk food items, TRY\*



## Regional median price of vegetables, TRY\*



## Food price changes

Item	Unit	Median Price TRY	1-month change (TRY)	6-month change (TRY)	Median Price USD**
<b>Bulk food items</b>					
Bulgur	1kg	20	0%	+16%▲	0.61
Red lentils	1kg	32	+5%▲	+40%▲	0.96
Rice	1kg	28	+8%▲	+27%▲	0.85
Salt	500g	5	0%	+60%▲	0.15
Sugar	1kg	30	+5%▲	+14%▲	0.90
Tomato Paste	1kg	50	+8%▲	+25%▲	1.51
<b>Vegetables</b>					
Tomatoes	1kg	19	+9%▲	+121%▲	0.57
Potatoes	1kg	11	+10%▲	+29%▲	0.34
Cucumbers	1kg	22	-19%▼	+152%▲	0.66
Onions	1kg	14	+35%▲	+93%▲	0.41

\*No data was collected in February 2023 due to the earthquakes.

\*\*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMMI.

### Food price trends

The SMEB food price and SMEB value are influenced by a wide range of factors, including fragile supply chains heavily reliant on imported goods (affected by control areas and borders), ongoing conflict events, political instability, economic sanctions, and natural disasters. Currently, these constraints are exacerbating the hardships faced by populations in northwest Syria. Key informants (KIs) report significant price increases for basic necessities, making it difficult for families to afford food. They specifically point to the recent depreciation of the Turkish lira, disruptions in supply routes due to conflict, and reduced humanitarian aid as primary drivers of worsening conditions. This combination of factors has led to increased food insecurity, deteriorating health, and heightened vulnerability among displaced populations and host communities.

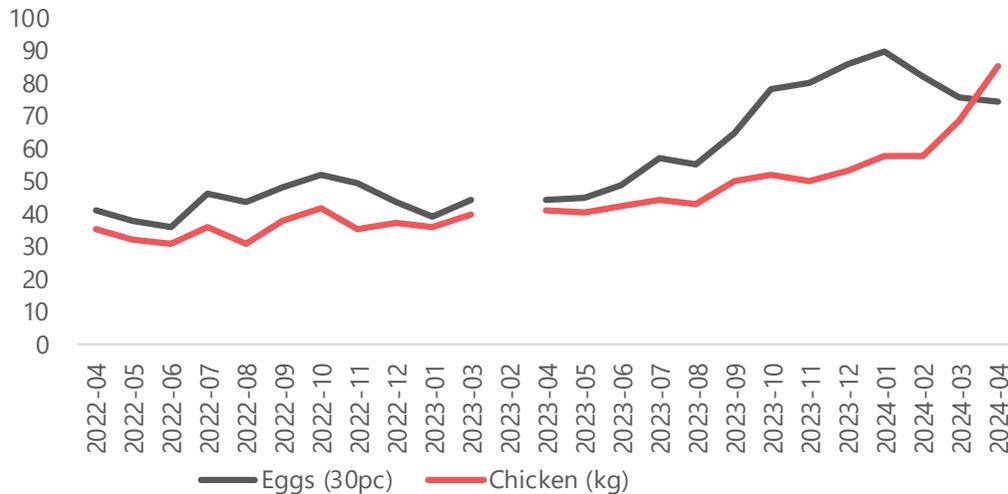


**61%** of surveyed vendors in April reported subsidised bread was not available in their community.

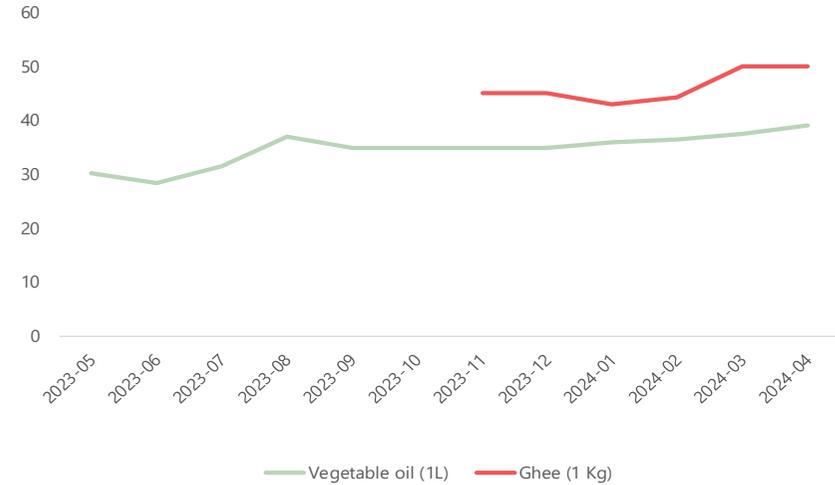


**6%** of surveyed vendors in April reported unsubsidised bread was not available in their community.

### Regional median price of poultry items, TRY\*



### Regional median price of vegetable oil, TRY\*



### Food price changes

Item	Unit	Median Price TRY	1-month change (TRY)	6-month change (TRY)	Median Price USD**
<b>Cooking oils</b>					
Ghee	1kg	50	0%	NA	1.52
Vegetable oil	1L	39	+4%▲	NA	1.19
<b>Poultry</b>					
Chicken	1kg	85	+24%▲	+70%▲	2.59
Eggs	1kg	75	-1%▼	+15%▲	2.27
<b>Bread</b>					
Subsidised bread	8pc	6	-5%▼	NA	0.19
Unsubsidised bread	8pc	10	0%	NA	0.30

### Poultry price trends

Between March and April 2024, the price of chicken increased, while egg prices decreased for the second consecutive month. Historical data from JMMI cycles shows that both chicken and egg prices typically fluctuate seasonally, often increasing during winter. This seasonal variation is due to reduced production during colder months when shorter daylight hours limit poultry productivity, leading farmers to raise prices to manage lower supply. April, being a transitional month regarding temperatures, also coincided with Ramadan, a period when demand for chicken usually rises. The differing movements in egg and chicken prices were influenced by market demand during this time. Additionally, poultry farming relies heavily on imported inputs, and currency depreciation likely contributed to higher operational costs for these farms.

\*No data was collected in February 2023 due to the earthquakes.

\*\*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMMI.

### Non food items

Between March and April 2024, the median price of water trucking increased slightly by 1%, following a more substantial 20% increase in the previous month.

The regional median prices of monitored hygiene items overall increased by 1% between March and April 2024. The price of these commodities are broadly sensitive to exchange rate fluctuations. Moreover, ensuring accurate monitoring of hygiene item prices across different brands is crucial to avoid misleading conclusions due to fluctuating data. However, it is essential to note that the recorded prices reflect the availability of hygiene items being sold and the purchasing power at that time, particularly if enumerators are documenting prices for the most commonly used products in each category.

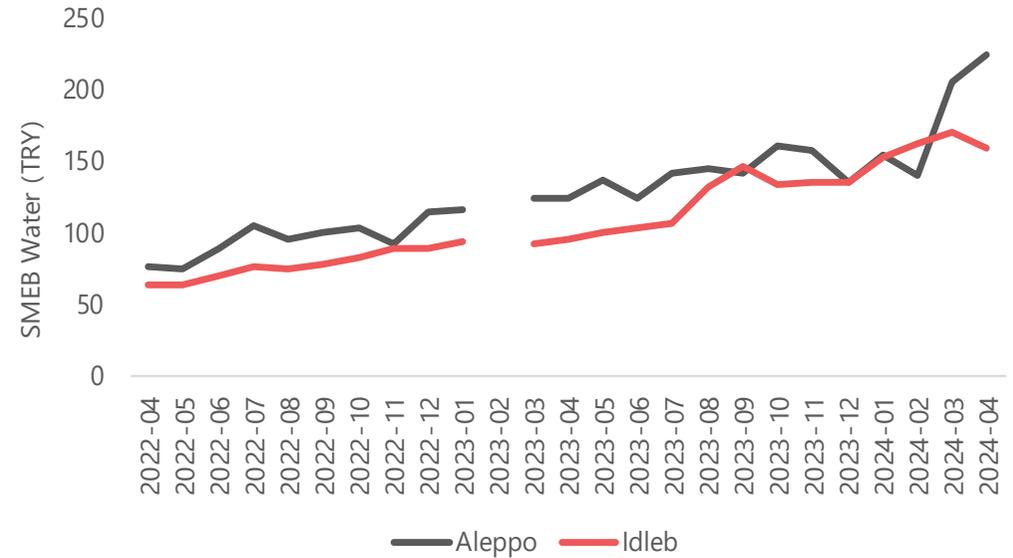
**97%**

of surveyed vendors reported that petrol subsidized fuel was unavailable in their community or neighborhood.

**95%**

of surveyed vendors reported that diesel subsidized fuel was unavailable in their community or neighborhood.

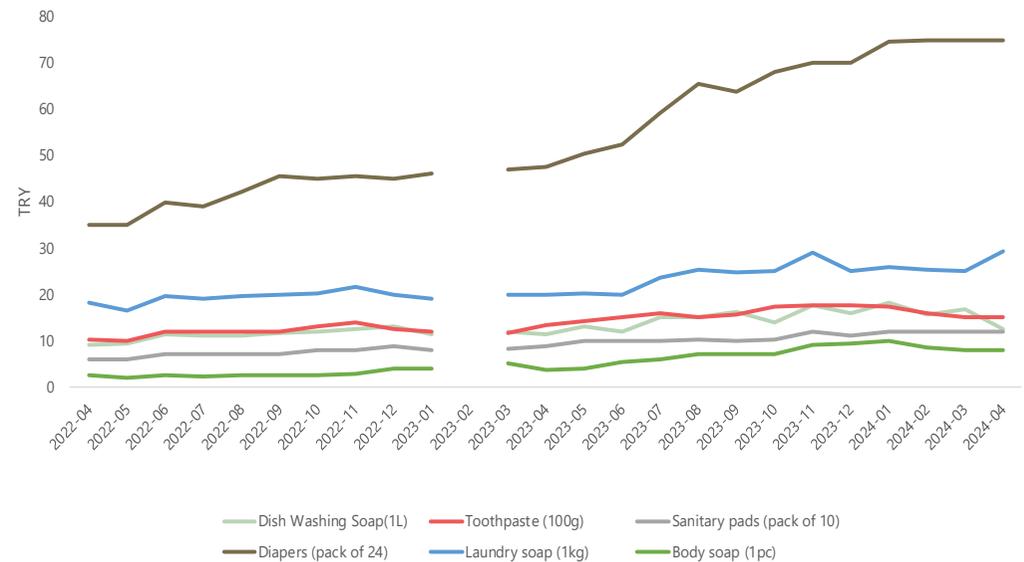
### Regional median SMEB water trucking prices, TRY\*\*



### Price changes of monitored non-food items

Item	Unit	Median Price TRY	1-month change (TRY)	6-month change (TRY)	Median Price USD*
<b>Non-food items</b>					
Bathing soap	1pc	8	0%	+14%▲	0.24
Sanitary pads	10pc	12	0%	+20%▲	0.37
Toothpaste	100g	15	+1%▲	-2%▼	0.46
Laundry powder	5kg	29	+17%▲	+18%▲	0.89
Dish soap	1L	12	-26%▼	-23%▼	0.38
<b>Cooking fuels</b>					
Kerosene	1L	26	+4%▲	+30%▲	0.79
LPG gas	1L	21	+4%▲	+19%▲	0.63
<b>Water trucking</b>					
Water trucking	1L	0.04	+1%▲	+31%▲	0.0013
<b>Internet</b>					
Mobile data	1gb	115	-4%▼	NA	3.5
<b>Transportation fuels</b>					
Imported diesel	1L	34	+4%▲	+16%▲	1.02
Imported petrol	1L	41	+4%▲	+17%▲	1.24
Manually refined diesel	1L	23	+12%▲	NA	0.69
Manually refined petrol	1L	32	+9%▲	NA	0.96

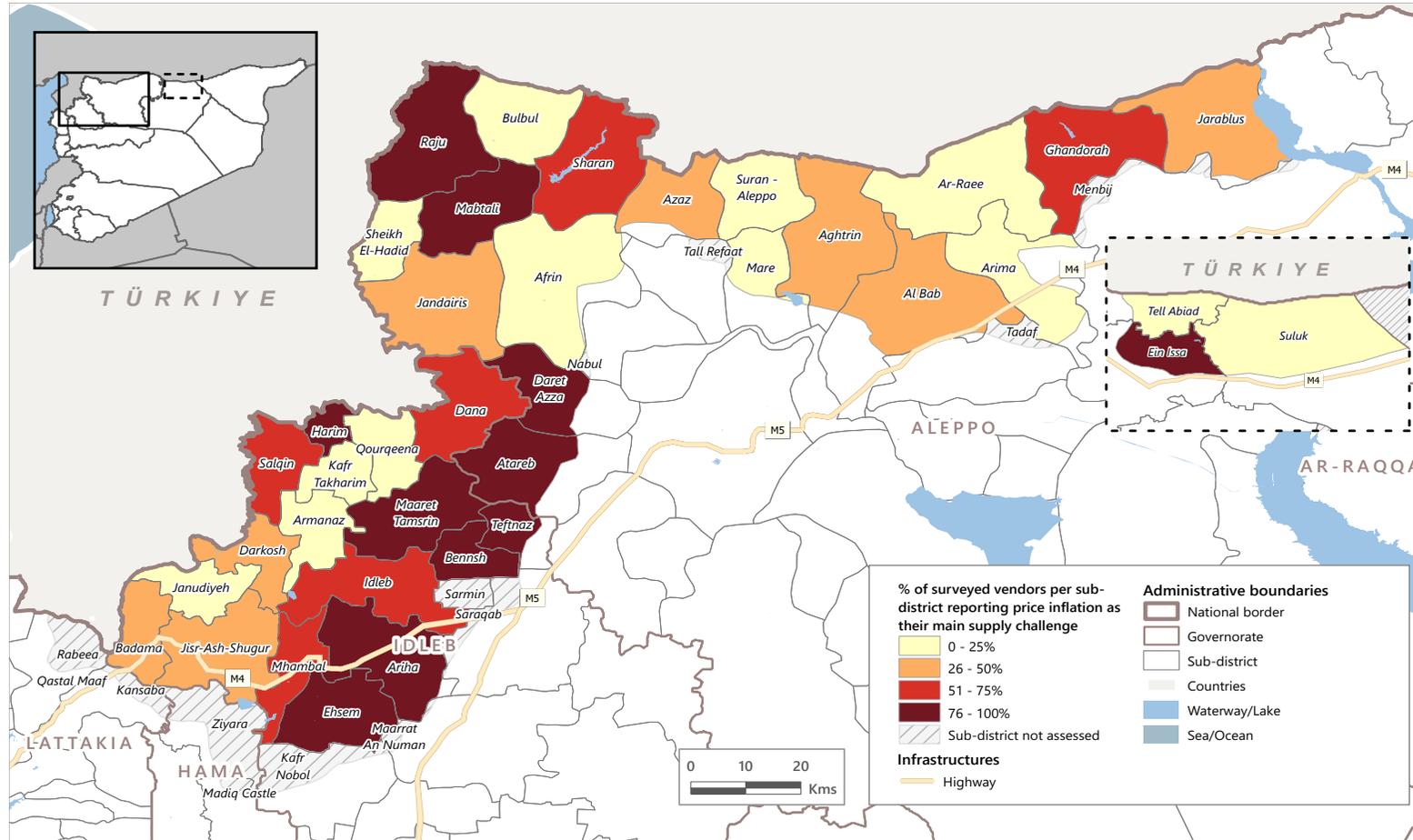
### Regional median price of hygiene items, TRY\*\*



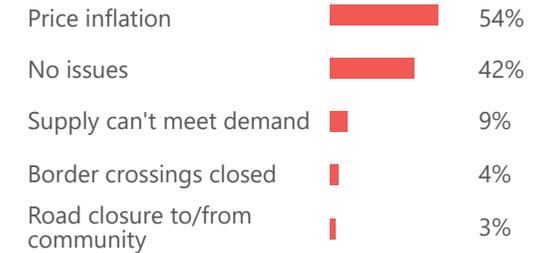
\*USD values are calculated as per the median regional informal exchange rate recorded in this round of JMML.

\*\*No data was collected in February 2023 due to the earthquakes.

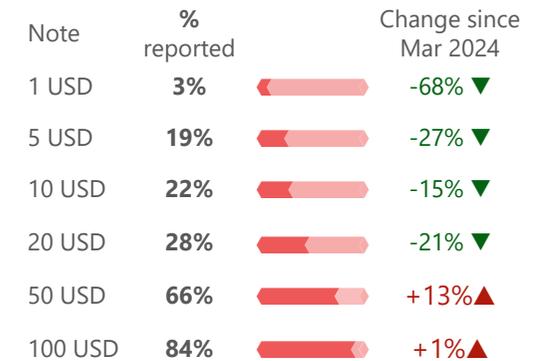
## % of surveyed vendors reporting price inflation impacting their capacity to secure stocks



## Top 5 reported supply challenges, % of surveyed vendors



## % of vendors reporting limited USD denominations



### Supply challenges

Price inflation stood out as the primary challenge affecting vendors' stock procurement capabilities, with border closures and supply bottlenecks being less frequently mentioned. This highlights the constrained purchasing power of vendors, exacerbated by high inflation and stagnant wages, which places significant pressure on businesses dealing in essential commodities. Consequently, the increased costs are passed on to consumers.

Meanwhile, the proportion of vendors experiencing shortages of smaller USD bank notes showed a slight decline from March to April 2024.

## Methodology

The JMMI aims to inform market-based programming in Northern Syria.

### Coverage

Coverage is determined through a combination of identifying key market hubs and partners' field capacity. Firstly, key market hubs are identified using the [Humanitarian Situation Overview in Syria](#) (HSOS), classifying all communities that 5 or more other communities report to rely on for markets as a key market hub. Secondly, these "key market hubs" are reviewed by the field teams for validity purposes. In this step, additional important markets in communities are included. These could be communities that either a) have significant markets but were not included in HSOS coverage, or b) communities that have markets that are important for people living in camps. Finally, we compare the ideal coverage with the capacity of partners and aim to ensure that key market hubs are covered. The actual coverage is, therefore, restricted to the capacity of partners.

### Data Collection

In each assessed location, at least three prices (ideally 4) per food & non-food item need to be collected from different traders to ensure the quality and consistency of the collected data. In line with the purpose of the JMMI, only the prices of the cheapest, most commonly bought type of item are recorded for each product, except in cases where otherwise indicated. For example, certain NFI items specific products are monitored at the request of the shelter cluster.

### SMEB Calculation:

The cost of the SMEB is determined by multiplying the median price of each item in the respective location by the quantity listed in the table on page 2.

### Identification of traders

Field teams identify traders to assess based on the following criteria:

- Traders are retailers selling directly to consumers.
- Traders need to be representative of the local price level.
- Traders have knowledge of the shop operations.

To the extent possible, the same traders are revisited in every data collection round.

### Enumerators and training

The data are collected by field staff familiar with local market conditions. They undergo training on the methodology and tools provided by REACH. Training sessions occur each time a new partner joins the JMMI, at partner request, and at scheduled intervals throughout the year, such as when the assessment undergoes changes. Additionally, field teams are equipped with a JMMI Standardised Operational Procedure (SOP) offering guidance on market identification, trader assessment, and pricing. The REACH JMMI team manages the integration of partner feedback on the JMMI SOP, sharing updates, and conducting re-training with the field, as needed. Data collection is carried out using the KOBO Collect mobile application.

### Data cleaning and analysis

After data collection, REACH compiles and cleans all partner data, standardizing prices, cross-checking outliers, and calculating the median cost of prices in each assessed location. Follow-ups are initiated with field teams to address data queries, including outliers, missing data, and incorrect entries. The median item prices reported in this factsheet are 'location medians,' designed to mitigate the impact of outliers and variations in data quantity among assessed locations.

### Aggregation

The published data is presented at the community, sub-district, district, governorate, and regional levels. At each aggregation level, the median of all prices collected within the unit of analysis is calculated. For example, at the regional level, the median of all prices collected for a specific product in the entire region is calculated, while at the governorate level, the median of all prices collected in that governorate is calculated, and so forth. All SMEB and price index calculations utilize this method.

### Challenges and limitations

- Price data is only indicative for the time frame within which it was collected. Prices may vary between data collection rounds.
- The JMMI data collection tool requests the cheapest, most commonly bought type of each item to be recorded, as availability varies across regions. Therefore, price comparisons across regions may be based on slightly varying products.
- With current coverage, data is mostly collected from main markets, which may not be representative of rural areas.
- As the JMMI continues to expand and is extended to additional locations, the reported changes in the overall median prices may be driven by shifts in coverage rather than actual price changes.

JMMI data is updated monthly through the [Interactive Dashboard](#) where users can filter for SMEB components of interest, currencies, and assessed areas. The [full dataset](#) is also available for download.

## 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).

## Endnotes

- 1 REACH, [Turning data into action: Meeting humanitarian challenges amid funding shortfalls in Syria](#), May, 2024
- 2 REACH, Humanitarian Situation Overview Syria, [Dataset](#), April 2024
- 3 The [first version of the SMEB](#), 2014
- 4 The current SMEB is based on the [2017 Revision](#), 2017

## About the CWG

The JMMI exists within the framework of the Cash Working Group (CWG). In northwest Syria (NWS), the CWG was established in May 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. For more information about the CWG in NWS, please contact the cash working group coordinator at [cbr.twg@gmail.com](mailto:cbr.twg@gmail.com).

## 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. All activities are conducted through inter-agency aid coordination mechanisms.

More details on the methodology can be found in the JMMI [terms of reference \(ToR\)](#). For more information about REACH, please contact the REACH JMMI focal point, Adna Maiteh, at [adna.maiteh@reach-initiative.org](mailto:adna.maiteh@reach-initiative.org) or visit the REACH Syria Resource Centre.

## Participating organisations

Each month, around 20 different organisations work together to collect market data. Participating organisations train their enumerators on the JMMI methodology and data collection tools using standard training materials developed by REACH, who is then responsible for processing the data.

