

Syria Nationwide Market Network Analysis

July - August 2025

Context & Rationale

In 2025, over 16.5 million Syrians are in need of humanitarian assistance, including 2.5 million displaced returnees who have lost their homes and livelihoods¹. Despite political change and recovery efforts, Syria faces one of the world's most complex and multifaceted humanitarian crises. The country continues to suffer from widespread economic instability, large-scale displacement, severely damaged infrastructure, and escalating climate-related challenges².

In this context, access to markets, both local and secondary or external markets, is critical to enabling affected populations to meet their basic needs, including fresh and bulk food, hygiene non food items (NFI), fuel, and shelter materials. This Market Network Analysis (MNA) was conducted in order to gain an understanding of the functionality of local markets and the interdependencies between markets and communities. By pinpointing weak market linkages and areas most vulnerable to disruption, the analysis will significantly enhance risk assessment and contingency planning. When integrated with Joint Market Monitoring Initiative (JMMI) data, the mapping also offers a more granular geospatial understanding of Syria's market system. This aims to strengthen the design and targeting of market-based interventions, and inform preparedness and response strategies.

Methodology Overview

The assessment employed a structured quantitative approach, conducting at least one key informant interview (KII) per community with individuals possessing strong local knowledge of market dynamics, with additional interviews in larger communities. Data collection took place in July 2025, aligned with REACH's Humanitarian Situation Overview of Syria (HSOS), and the final sample included 1,054 KIIs across 731 communities. Primary data were triangulated with relevant secondary sources where possible. A hybrid analytical approach, combining community-level reporting, item-level analysis, and spatial mapping, was applied to capture both concentrated and dispersed market dependencies, enabling a nuanced understanding of price- and supply-driven vulnerabilities and producing actionable insights. For further methodological details, please refer to the published TORs. [TORs](#).

Key Messages

- **Overall, while local markets serve the majority of communities, their ability to meet demand is uneven across Syria, reflecting a fragmented national market system.** Physical access, affordability, and availability of essential goods vary sharply by region, as does reliance on external markets and the catchment areas of key market hubs, leaving some governorates, such as Raqqqa, Lattakia, and Idleb, particularly dependent on external sources and vulnerable to supply disruptions or price shocks.
- **Nationwide, local markets remain the primary point of exchange, with 69% of assessed communities reporting that most residents buy and sell all goods of all types within their own community boundaries.** This demonstrates that, despite economic and logistical challenges, local markets continue to play a central role in day-to-day transactions across much of Syria.
- **At the same time, 79% of communities reported typically sourcing at least one of the five monitored essential item categories, fresh food, bulk food, hygiene NFIs, fuel, and shelter materials, from external markets, the majority even outside of their sub-districts.** This shows that reliance on external markets is widespread and not limited to areas with non-functional local markets, reflecting households' pursuit of better prices, higher quality, or a wider variety of items.
- **Across all monitored item categories, the share of communities sourcing items from external markets at nationwide level was found to exceed the share reporting those items as unavailable locally, suggesting that reliance on external markets is not solely driven by lack of availability** but also by factors such as lower prices, better quality, or greater product variety. At the governorate level, however, some positive gaps emerge, where unavailability rates surpass external sourcing rates, pointing to potential structural access gaps for essential items.
- **High dependency on external markets combined with varying degrees of external market concentration highlights the existence of dominant hubs at governorate level, such as Ar-Raqqqa and Dar'a cities, which serve wide catchment areas but also represent potential single points of failure within supply chains.**
- **The interaction between external market reliance, concentration, and SMEB prices points towards the existence of two main types of vulnerability within Syria's market systems: price-driven market vulnerability and supply-driven market vulnerability, with most governorates exhibiting hybrid characteristics that combine elements of both.**

Main market source for essential items

Nationwide, 69% of assessed communities reported that the majority of residents rely primarily on markets within their own community boundaries to buy or sell goods if needed, confirming that local markets remain the main point of exchange across much of Syria. However, **in one out of four communities (25%), the majority of residents depend on external markets for their basic transactions.** The highest levels of reliance on external markets for transaction activities outside the community of assessment were observed in Al-Hasakeh (41% of assessed communities), followed by Lattakia (40%), Raqqa (38%), and Aleppo (33%).

Primary sources of market activity in communities in Syria, by percentage of overall assessed communities

| | |
|--|-----|
| Marketplace or store inside the community | 69% |
| Marketplace or store outside the community | 25% |
| Other sources | 6% |

Across all monitored item categories, the share of communities sourcing items from external markets at nationwide level was found to exceed the share reporting those items as unavailable locally. This indicates that reliance on external markets is not solely driven by lack of availability but also by factors such as lower prices, better quality, or greater product variety. For example, while only 39% of communities reported bulk food as unavailable locally, 46% typically source it externally.

Nationwide share of communities reporting basic items as typically unavailable in local markets, typically sourced from external markets, and the corresponding percentage-point difference

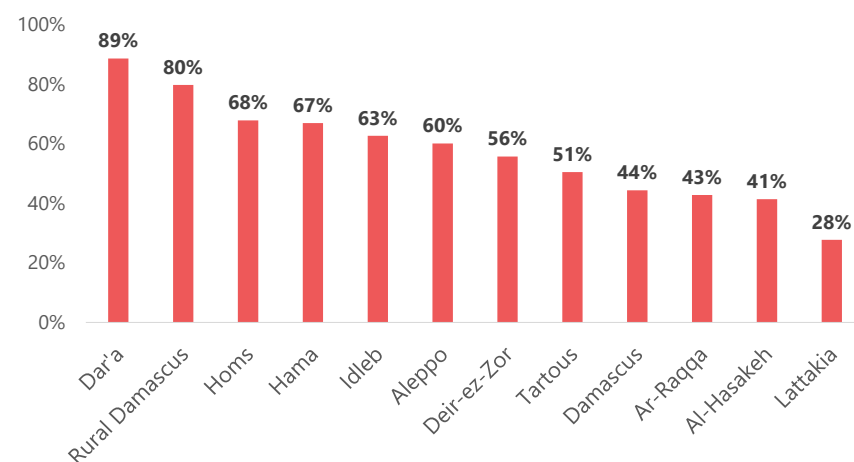
| | Typically unavailable in local market | Typically sourced on external market | Difference (percentage points) |
|-------------------|---------------------------------------|--------------------------------------|--------------------------------|
| Bulk foods | 39% | 46% | -7 |
| Fresh foods | 17% | 30% | -12 |
| Fuel | 27% | 38% | -11 |
| NFIs | 30% | 46% | -16 |
| Shelter materials | 52% | 54% | -2 |

At the governorate level, however, some positive gaps emerge, where unavailability rates surpass external sourcing rates, pointing to potential structural access gaps for essential items. In these areas, such as Deir-ez-Zor for most items and Dar'a or Ar-Raqqa for bulk and fresh food, limited external sourcing despite high unavailability suggests that households may face complete shortages, with few or no viable market alternatives.

Access barriers to local markets

While external sourcing often reflects consumer preference or price advantages, it also intersects with local accessibility conditions. **Nationwide, 60% of communities reported no obstacles to accessing their local markets, suggesting that most markets remain physically, economically and socially accessible.** However, accessibility to local markets was highly uneven across governorates, indicating localized vulnerabilities that may exacerbate inequalities in the availability of essential goods.

Share of communities reporting no barriers to accessing local markets, by governorate

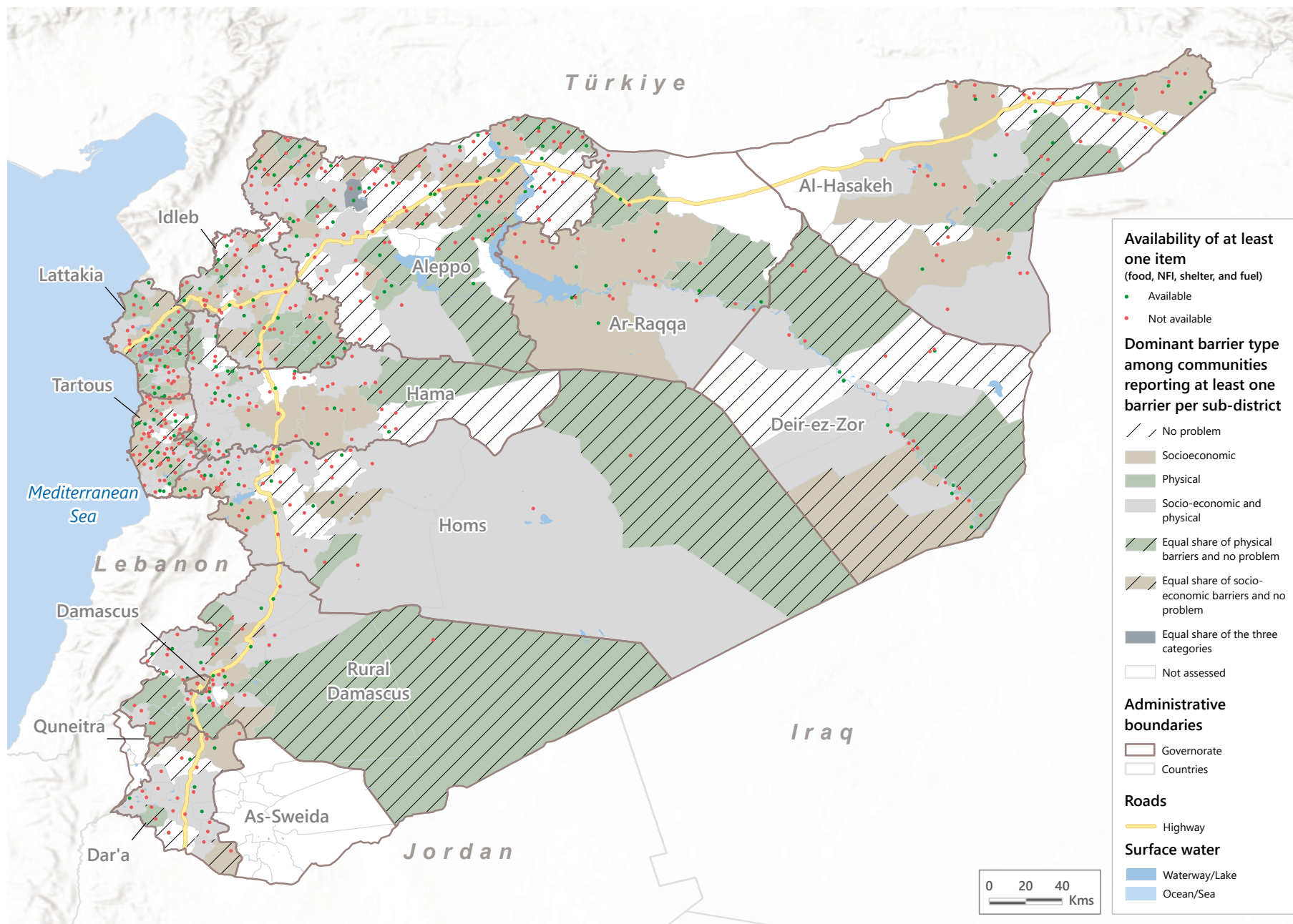


Among the 40% of communities facing at least one barrier, economic constraints were the most commonly reported (80%), primarily due to limited purchasing power or high costs of goods, fuel, and transport. Other barriers included long distances to local markets (37%) and physical access challenges (23%), such as damaged roads or insufficient transportation options. These findings suggest that **the high cost of goods and low purchasing power continue to limit households' effective access to local markets: factors that may also drive reliance on external markets even where local ones exist.**

Main reported barriers to accessing local markets, by percentage of overall communities who reported at least one barrier

| | |
|--|-----|
| Economic - Cannot afford market prices, fuel or transport to access market | 79% |
| Marketplace too far | 37% |
| Physical access - damaged roads, no transport, etc. | 23% |
| Access to marketplaces is unpredictable | 6% |
| Environmental - flooding, extreme heat, droughts, etc. | 4% |

Map1: Overview of assessed communities reporting availability of at least one monitored essential item category (food, hygiene NFIs, shelter items, and fuel), overlaid with the most frequently reported barrier to accessing local markets at the sub-district level.



External market reliance rate

In this assessment, reliance on external markets was defined as the need to visit markets located outside a community’s administrative boundaries to obtain one or more of the monitored essential SMEB items. The share of communities reporting frequent or typical sourcing of at least one item from external markets was used as a proxy for the external market reliance rate. Reliance rates were calculated at the governorate level for each item category and aggregated at the national level to produce an overall measure. The overall external reliance rate thus represents the percentage of communities per governorate that typically source at least one of the five monitored essential SMEB item categories from external markets.

At the national level, external market dependence was high, with 79% of communities reporting regular reliance on external markets for at least one of the monitored essential item categories part of the SMEB. Analysis across governorates revealed significant variation in external market reliance by location and item type. The highest external reliance rates were observed in Ar-Raqqa (90%) and Idlib (90%), followed by Lattakia (87%), Homs (87%), and Aleppo (84%). In contrast, Damascus reported the lowest rate (22%), likely due to the fact that the governorate mainly comprises Damascus city, which serves as Syria’s capital and primary commercial centre.

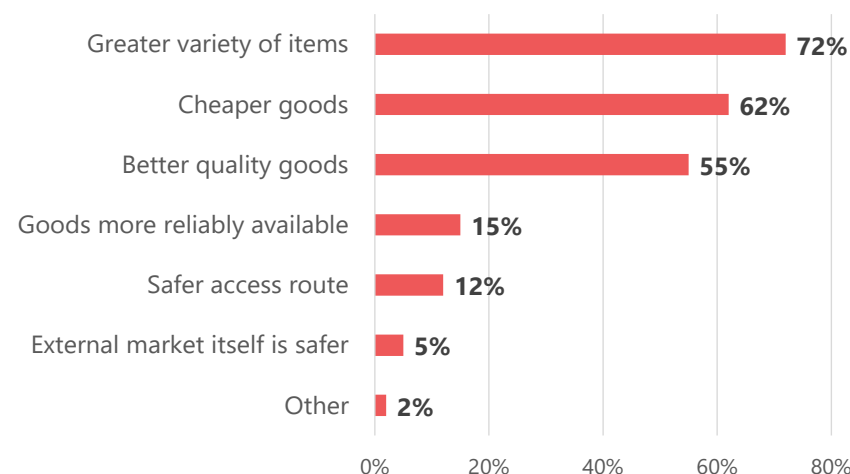
Across the governorates, external market reliance exhibits contrasting patterns, with Al-Hasakeh emerging as an outlier, characterized by a polarized, spatially concentrated reliance structure, while the other governorates display a more geographically dispersed, item-level dependence. In Al-Hasakeh, although item-level reliance rates are broadly comparable to national averages, the aggregate reliance (54%) remains well below the national figure (79%), reflecting two distinct community profiles: some depend on external markets for multiple items, while others remain largely self-sufficient. By contrast, governorates such as Rural Damascus, Deir-ez-Zor, Tartous, and Dar’a exhibit higher overall external reliance despite similar item-level rates, suggesting that dependence is spread across communities and commodities, indicative of geographically dispersed item-level reliance and potentially stronger market linkages and integration.

Economic and quality factors, rather than safety concerns, primarily emerged as the main factors driving nationwide reliance on external markets. Households most commonly used external markets for the greater variety of items (72%), cheaper prices (62%), and better quality goods (55%) compared to local markets. This pattern is consistent across all governorates and monitored item categories, indicating that economic and quality advantages, rather than just availability and physical access barriers, are the main drivers of external market use.

Share of communities typically sourcing from external markets and overall external market dependence rates, by item category and governorate

| | Shelter materials | Bulk food | NFIs | Fuel | Fresh food | None | External market reliance rate |
|----------------|-------------------|-----------|------|------|------------|------|-------------------------------|
| Damascus | 0% | 0% | 11% | 0% | 22% | 78% | 22% |
| Al-Hasakeh | 49% | 45% | 44% | 43% | 40% | 46% | 54% |
| Rural Damascus | 42% | 36% | 40% | 17% | 9% | 31% | 69% |
| Deir-ez-Zor | 54% | 50% | 42% | 50% | 35% | 27% | 73% |
| Tartous | 41% | 43% | 49% | 44% | 24% | 22% | 78% |
| Dar’a | 52% | 44% | 58% | 32% | 29% | 18% | 82% |
| Hama | 61% | 24% | 32% | 26% | 11% | 18% | 82% |
| Aleppo | 60% | 59% | 53% | 52% | 47% | 16% | 84% |
| Homs | 65% | 42% | 41% | 36% | 35% | 13% | 87% |
| Lattakia | 38% | 51% | 46% | 58% | 31% | 13% | 87% |
| Ar-Raqqa | 69% | 48% | 52% | 38% | 50% | 10% | 90% |
| Idlib | 71% | 57% | 46% | 24% | 19% | 10% | 90% |
| Grand Total | 54% | 46% | 46% | 38% | 30% | 21% | 79% |

Main reasons for relying on external markets reported by communities in Syria, by percentage of overall assessed communities



External market concentration rate

In this assessment, market concentration refers to the degree of geographical concentration in external market reliance within each governorate. It was measured by calculating how often specific external markets were cited as the primary source for one or more item categories. The combined share of the three most frequently mentioned markets in each governorate was used as a proxy for overall concentration at governorate level.

A higher concentration rate indicates that a large share of communities depend on the same limited number of external markets to source essential items. This reflects the presence of dominant trade hubs with wide catchment areas but also signals increased vulnerability to potential disruptions. Conversely, a lower concentration rate suggests that reliance is distributed across multiple markets, pointing to a more diversified and resilient market network.

Across the country, market concentration levels vary considerably, with reliance on the top three external markets ranging from 53% in Dar'a and Ar-Raqqa to around 29% in Hama and Rural Damascus.

Overall, these findings highlight the uneven economic geography across Syria: governorates with higher concentration benefit from robust central trade hubs but remain more vulnerable to localized shocks, while those with lower concentration demonstrate more diversified and resilient market systems capable of sustaining supply in times of disruption.

Data suggests a high degree of inter-sub-district market dependency across Syria, with 60% of communities rely primarily on external markets located outside their own sub-district for one or more of the five monitored essential item categories.

This finding highlights that the catchment areas of key markets frequently extend beyond administrative boundaries, meaning that many consumers travel to neighboring sub-districts as their first choice for accessing essential goods, as an alternative to markets within their immediate community.



60% of communities in Syria reported depending on markets outside their sub-district

Top three communities most frequently identified as main external markets, and corresponding concentration rates, by assessed communities per governorate³⁴

| Governorate | 1st | | 2nd | | 3rd | | External market concentration rate |
|----------------|-------------|-----|----------------|-----|-------------|-----|------------------------------------|
| Dar'a | Dar'a | 29% | Nawa | 13% | As-Sanamayn | 11% | 53% |
| Ar-Raqqa | Ar-Raqqa | 26% | Jurneyyeh | 15% | Al-Thawrah | 11% | 52% |
| Al-Hasakeh | Al-Hasakeh | 18% | Al-Malikeyyeh | 15% | Disheisha | 11% | 46% |
| Lattakia | Lattakia | 19% | Al-Haffa | 15% | Jablah | 11% | 45% |
| Idlib | Idlib | 22% | Sarmada | 10% | Dana | 9% | 43% |
| Homs | Homs | 22% | Karm Ash-Shami | 13% | Al-Qusayr | 6% | 41% |
| Tartous | Tartous | 23% | Banyas | 9% | Dreikish | 9% | 41% |
| Deir-ez-Zor | Ashara | 13% | Abu Kamal | 12% | Al Jourah | 9% | 34% |
| Aleppo | Ain Al Arab | 12% | Menbij | 10% | Sarin | 11% | 33% |
| Rural Damascus | Duma | 12% | Hameidiyyeh | 9% | Zahreh | 8% | 29% |
| Hama | Hama | 11% | As-Salamiyeh | 10% | Masyaf | 8% | 29% |

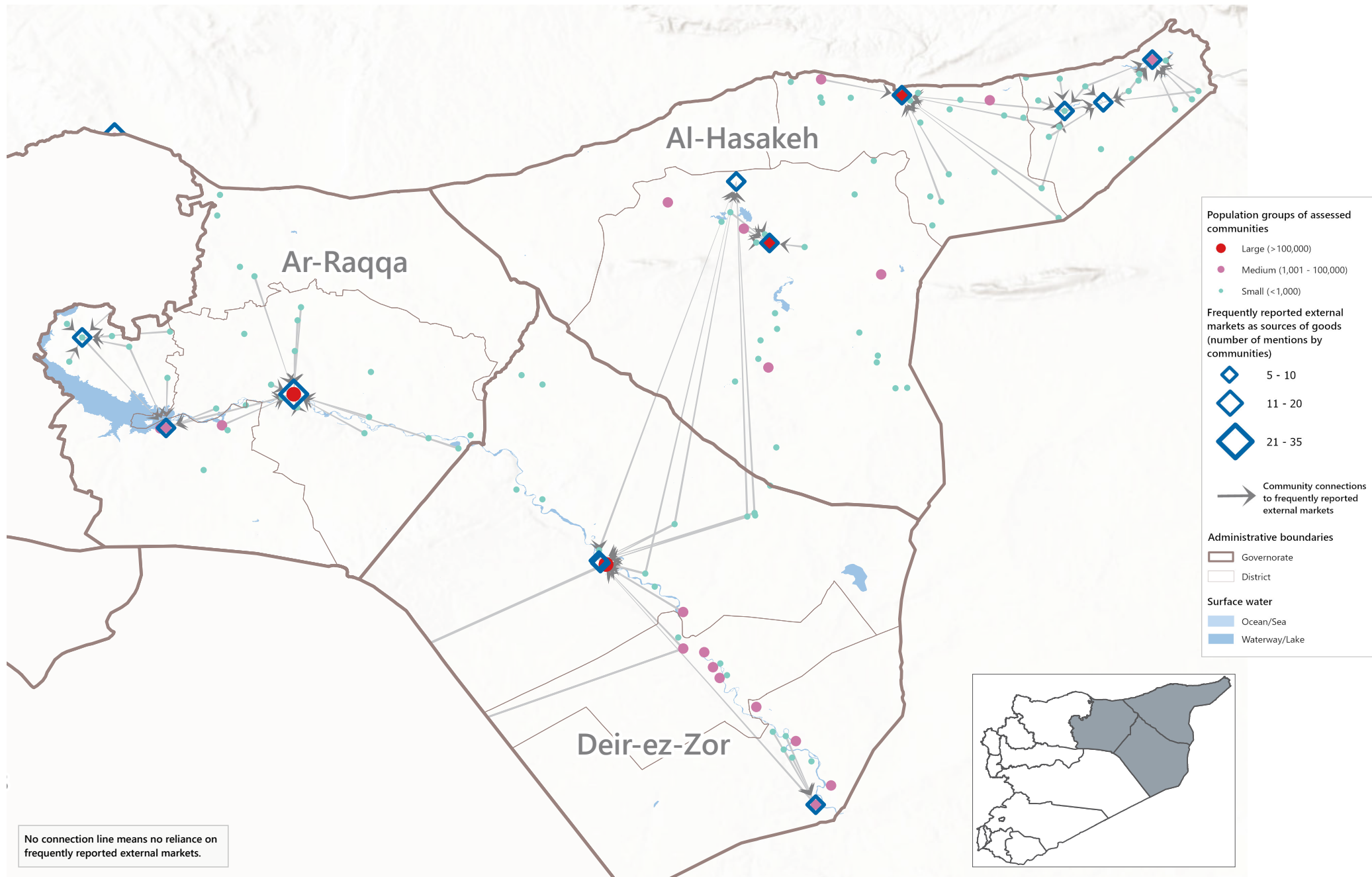
Cross-sub-district movements in these areas reflect strong market interconnections, where consumer demand transcends administrative divisions. For households, this may increase vulnerability to disruptions, such as road closures, insecurity, or transportation costs, that restrict mobility between sub-districts.

This trend is particularly pronounced in western governorates, with the highest levels of reported inter-sub-district dependency observed in Tartous (83%), Idleb (72%), Hama (71%), Rural Damascus (67%), and Dar'a (67%).

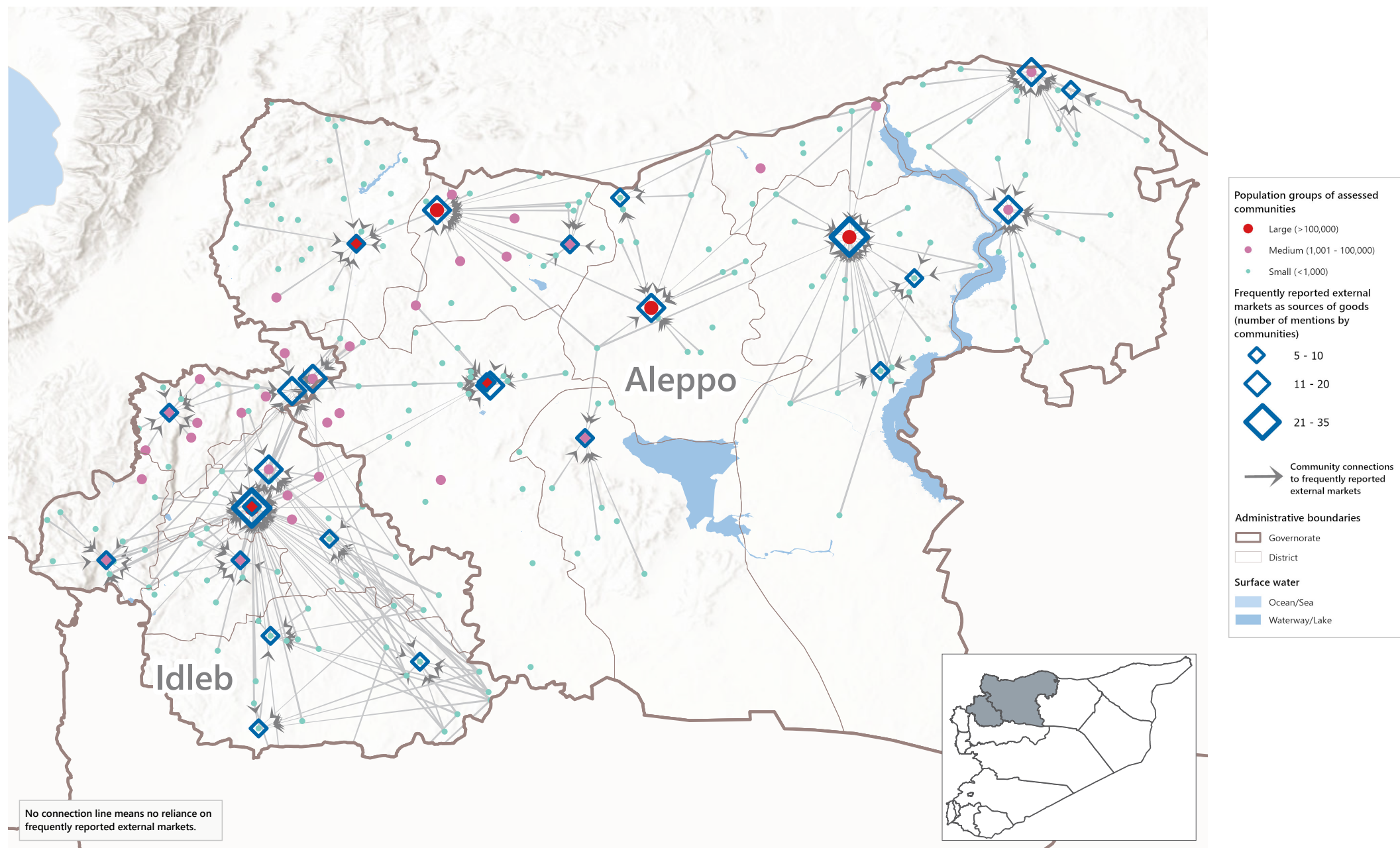
The same was not true for inter-governorate market-reliance, where only 10% of communities indicated a main alternative market located in a different governorate, with the highest of such share recorded in Rural Damascus (27%) and Deir-ez-Zor (18%).

Such dynamics should, however, be interpreted in relation to the geographical scale of sub-districts and the proximity of communities to sub-district borders.

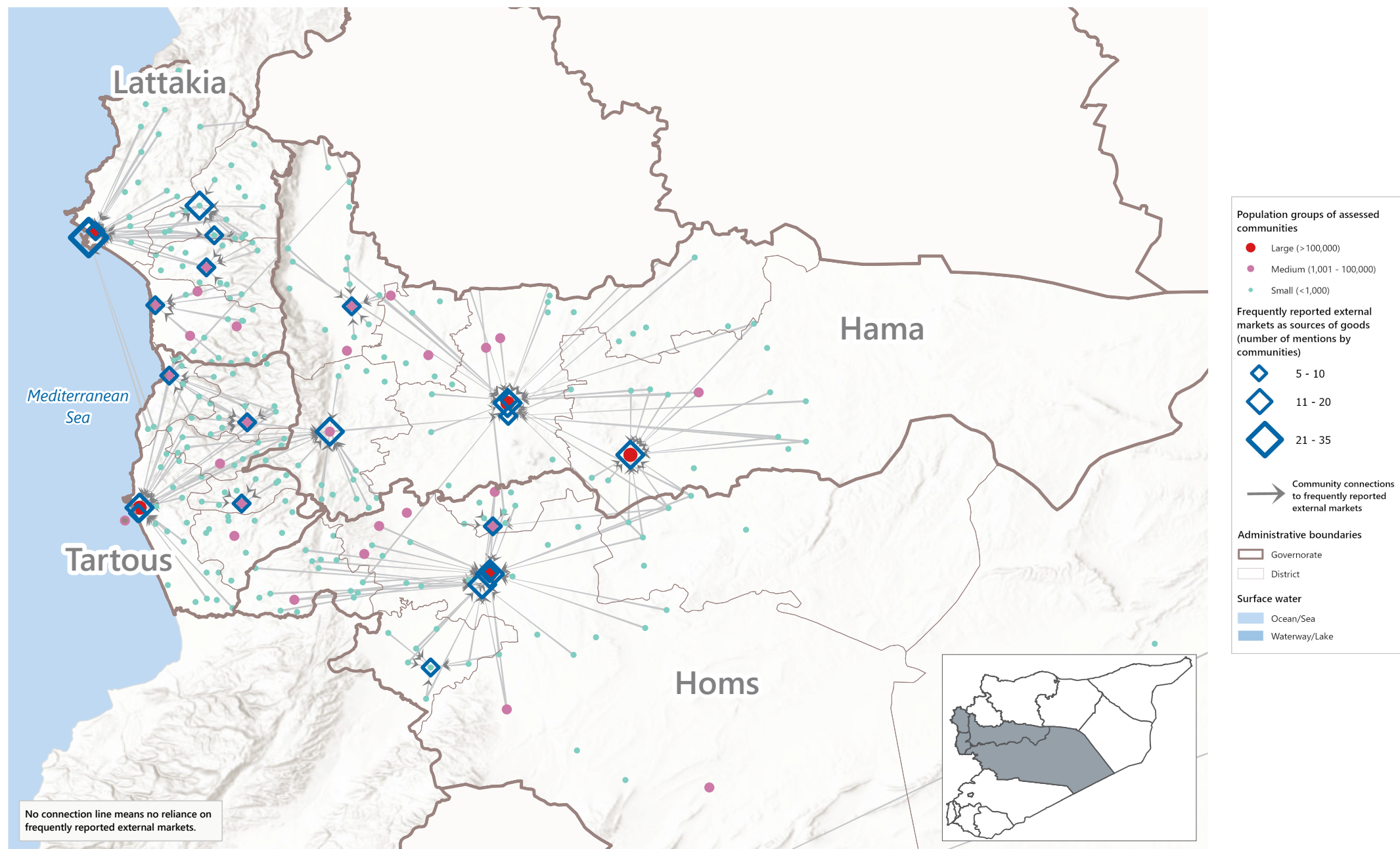
Map 2: Overview of assessed communities reporting reliance on external markets for at least one monitored essential item category (food, hygiene NFIs, shelter items, and fuel) and the most frequently reported main external markets in northeastern Syria (≥5 mentions).



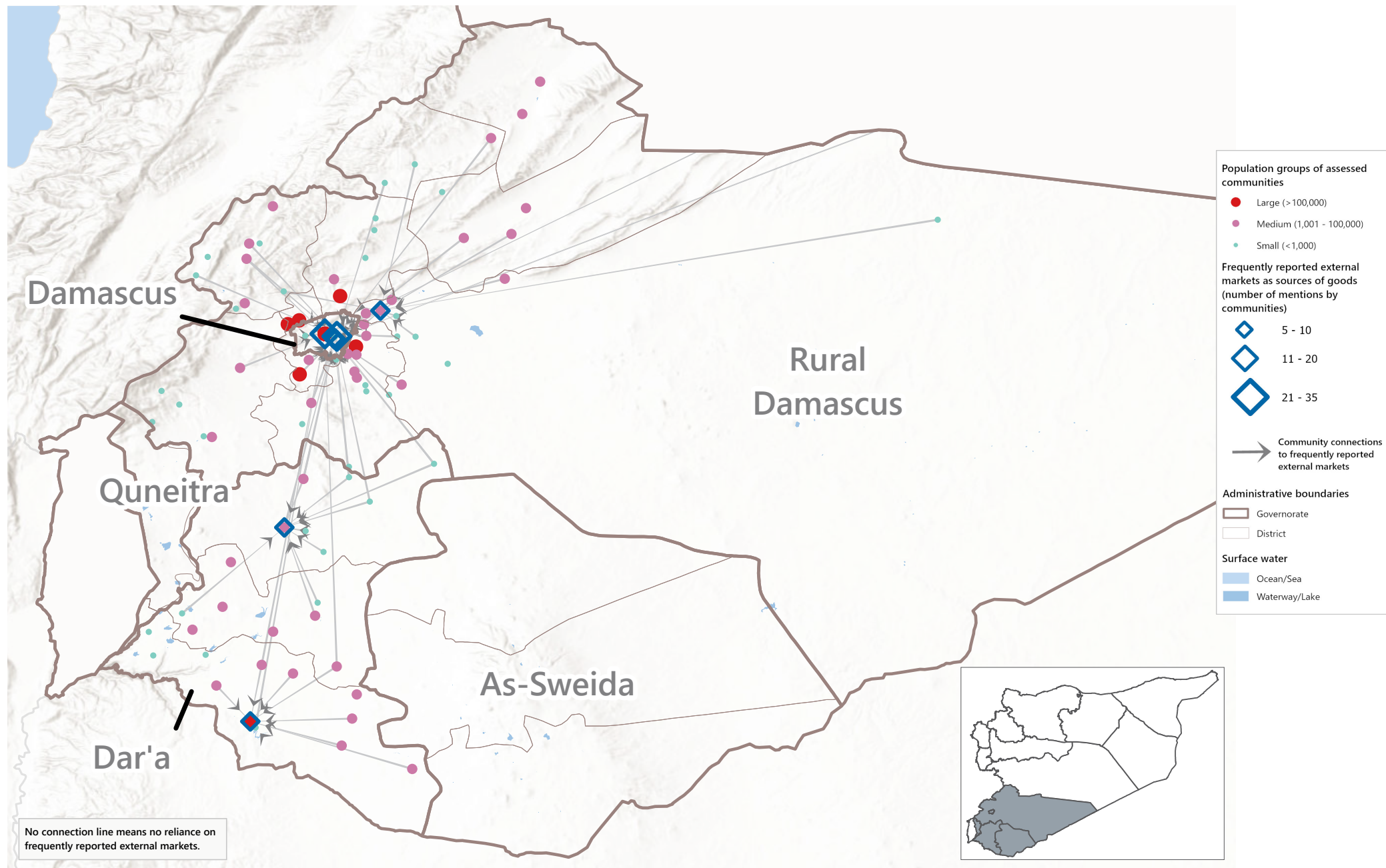
Map 3: Overview of assessed communities reporting reliance on external markets for at least one monitored essential item category (food, hygiene NFIs, shelter items, and fuel) and the most frequently reported main external markets in northwestern Syria (≥5 mentions).



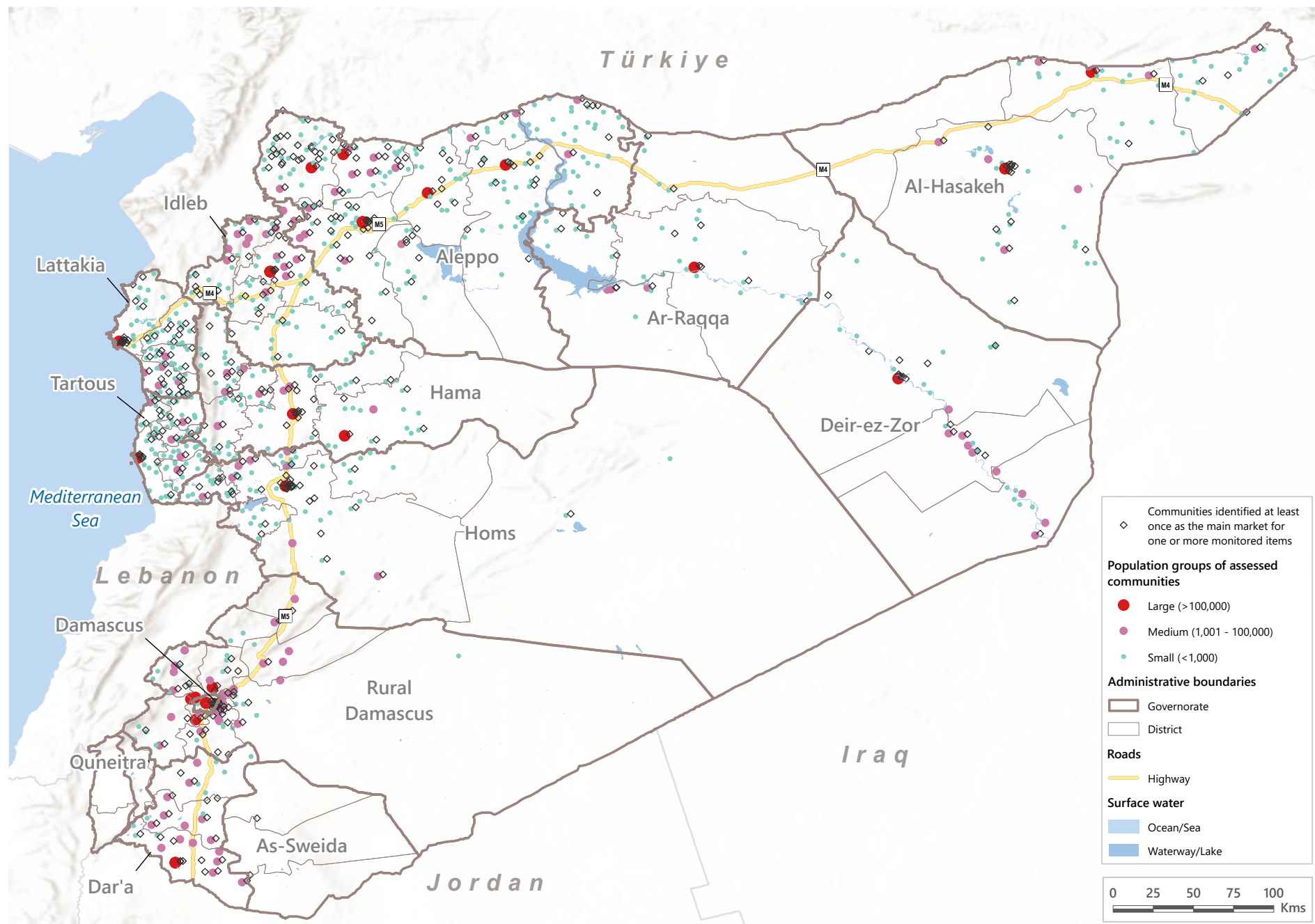
Map 4: Overview of assessed communities reporting reliance on external markets for at least one monitored essential item category (food, hygiene NFIs, shelter items, and fuel) and the most frequently reported main external markets in central Syria (≥5 mentions).



Map 5: Overview of assessed communities reporting reliance on external markets for at least one monitored essential item category (food, hygiene NFIs, shelter items, and fuel) and the most frequently reported main external markets in southern Syria (≥5 mentions).



Map 6: Assessed communities reporting reliance on external markets for at least one monitored essential item category (food, hygiene NFIs, shelter items, and fuel), and communities identified at least once as a main external market for any of the monitored item categories.



Patterns of Market Vulnerability

The interaction between external market reliance, concentration, and SMEB prices points towards the existence of two main types of vulnerability within Syria's market systems: price-driven and supply-driven, with several regions exhibiting hybrid characteristics combining elements of both.

Price-driven vulnerability is characterized by high market prices combined with moderate or low dependency on external markets, indicating that local markets are functional but goods are costly. Governorates such as Rural Damascus and Lattakia display elevated market prices despite relatively diversified sourcing networks. In these areas, local markets are likely functional but expensive, with affordability emerging as the main constraint on household access. In these areas, high prices are likely driven by limited competition, high input and transport costs, or inflationary pressures, rather than by structural shortages. While market connectivity seems intact, households remain highly vulnerable to economic shocks, as even small price increases could significantly reduce purchasing power.

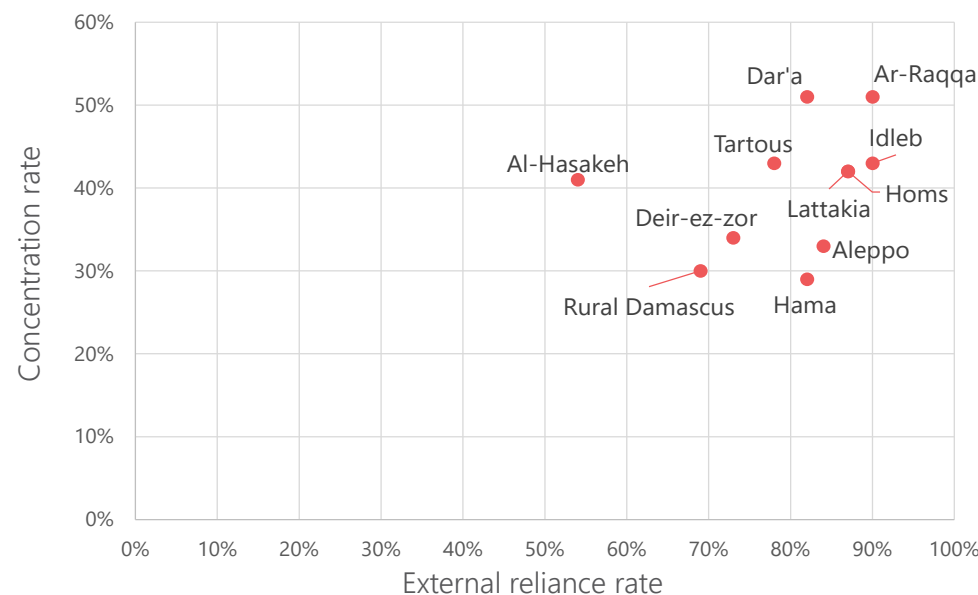
Supply-driven vulnerability is characterised by high reliance on external markets, which may be either concentrated in a few hubs or moderately diversified, making households sensitive to disruptions in supply chains. Governorates including Ar-Raqqa, Idleb, Homs, Aleppo, Dar'a, and Al-Hasakeh exhibit strong reliance on external markets, leaving them exposed to supply-chain disruptions. In Ar-Raqqa, Idleb, and Dar'a, this dependency coincides with elevated prices or concentrated sourcing networks, creating compound fragility where both affordability and access are at risk. On the other hand, Al-Hasakeh presents a more transitional case, with moderate levels of dependency but limited sourcing diversification, reflecting partial local functionality but continued exposure to corridor-based supply risks. In Aleppo and Homs, high dependency is partly mitigated by more diversified supply connections, indicating a degree of market adaptability, though underlying vulnerabilities persist.

Overall, except for Damascus governorate, which due to its capital city one-market system marks a national exception and is not comparable with the rest of the governorates, **no governorate shows both low external market dependency and low external market concentration, meaning that all regions display some structural fragility, either in affordability, in the reliability of supply chains, or both.** These dynamics highlight how fragmented and regionally unbalanced Syria's market system remains: even where markets are active, they are sustained by fragile supply networks or high cost structures. This configuration implies that shocks, whether economic, climatic, or security-related, can have uneven but cascading impacts, undermining both affordability and access across interconnected regions.

Governorates with corresponding external market reliance rate, top three external market concentration rate, and SMEB USD prices as of July 2025

| Governorate | Reliance on external market | External market concentration | SMEB price (USD) |
|----------------|-----------------------------|-------------------------------|------------------|
| Aleppo | 84% | 33% | 143 |
| Al-Hasakeh | 54% | 41% | 151 |
| Ar-Raqqa | 90% | 51% | 167 |
| Dar'a | 82% | 51% | 182 |
| Deir-ez-Zor | 73% | 34% | 155 |
| Hama | 82% | 29% | 168 |
| Homs | 87% | 42% | 169 |
| Idleb | 90% | 43% | 133 |
| Lattakia | 87% | 42% | 170 |
| Rural Damascus | 69% | 30% | 181 |
| Tartous | 78% | 43% | 168 |

Box plot of external market reliance and top three external market concentration rates by governorate



Endnotes

1 SANA (September 2025), "[UN Resident Coordinator: About 16.5 mm People in Syria Need Humanitarian Assistance - SANA](#)".

2 NRC (May 2025), "[Beyond return: Ensuring sustainable recovery & \(re\)-integration in Syria](#)".

3 Many of the external markets listed share the same name as their governorate because they are located in the main city or administrative center of that governorate. These are not inter-governorate markets, but rather central markets that serve surrounding communities. While they are considered external from the perspective of individual communities, they remain within the same governorate boundaries.

4 Damascus Governorate was excluded from the analysis due to its exclusively urban composition (Damascus city and adjacent neighborhoods). The resulting external market concentration rate of 0% is not analytically comparable to other governorates, which encompass multiple, distinct community-level market linkages.

5 World Bank Group (July 2025), "[New World Bank Report Highlights Syria's Economic Challenges and Recovery Prospects for 2025](#)".

6 Euaa (March 2025), "[Conflict-related infrastructure damage and explosive remnants of war](#)".

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).