

Northwest Syria | Joint Market Monitoring Initiative (JMMI)

1-10 January 2024

MARKET OVERVIEW

INTRODUCTION

To facilitate humanitarian cash programming, the Northwest 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
- 102 Assessed communities
- 5451 Shops surveyed

KEY INDICATORS

Cost of SMEB

4,521 TRY ▲ +1%

151 USD ▼ -1%

Cost of SMEB Food

3,295 TRY ▲ +3%

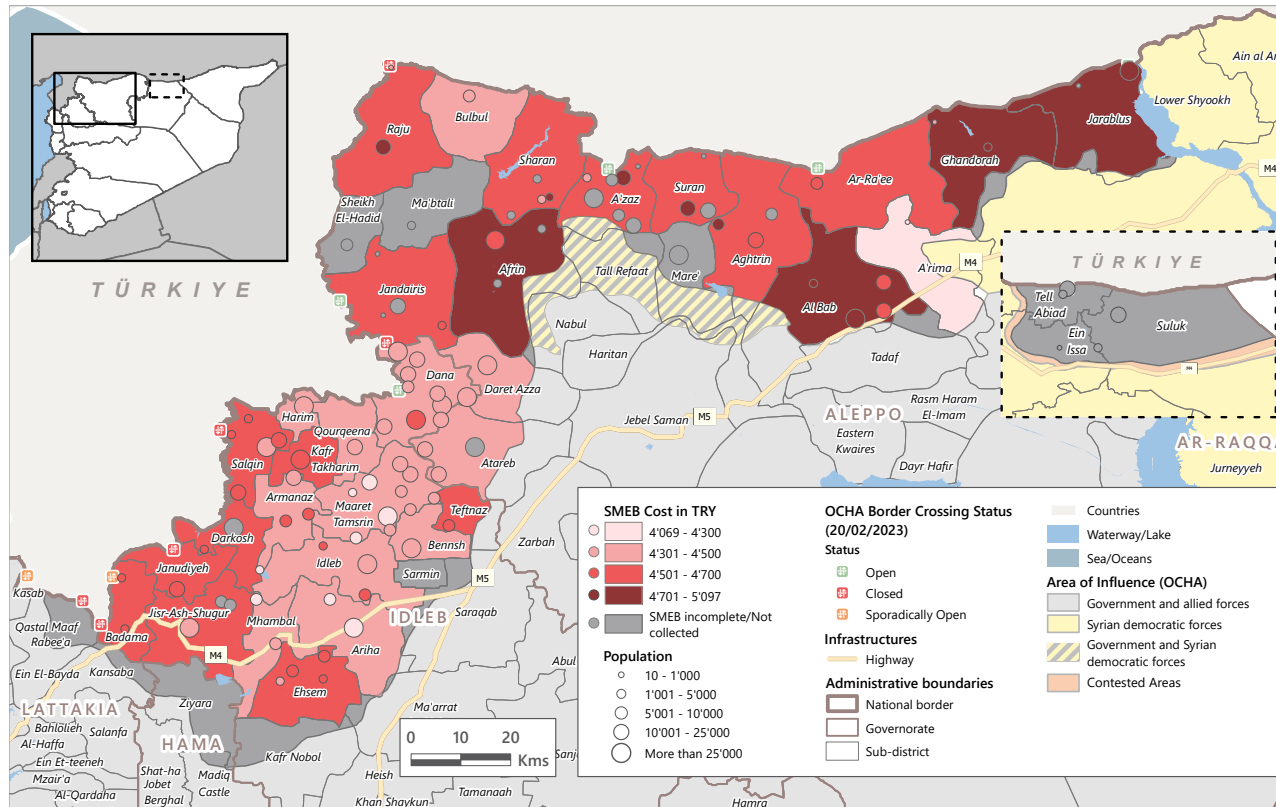
110 USD 0% change

USD/TRY

informal exchange rate

30 TRY ▲ +3%

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



KEY FINDINGS

- Between December 2023 and January 2024 the regional informal USD/TRY exchange rate increased by 3% (depreciation) continuing to impact the prices of basic commodities.
- The rate of depreciation in the last months in NWS has reduced following a period of high volatility in 2023.
- The price of fresh vegetables continued to climb between December 2023 and January 2024 as local produce is out of season and reliance on imports is high.
- Gas and transportation fuel prices remained relatively stable between December 2023 and January 2024 despite increasing unavailability in Northeast Syria (NES) since the attacks on gas and oil facilities in October 2023.¹
- Increased reliance on imports from Türkiye for fuels in NWS seems to have so far reduced the impact of market shortages in NES. The flip side of this is high sensitivity to volatility in Türkiye where supply chains in NWS are increasingly dependent on Türkiye.²

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

| | |
|-------------------------------|----------------|
| Food | |
| 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 |
| Hygiene (NFI) | |
| Bathing soap | 12 bars |
| Laundry / dish soap | 3 kg |
| Toothpaste | 200 kg |
| Sanitary pads | 4 packs of 10 |
| Other items | |
| Cooking fuel | 15 L |
| Water trucking | 4500 L |
| Phone data | 1 GB |
| Float (other costs) | 7.5 % of total |

Exchange rate trends

- Between December 2023 and January 2024 the regional informal USD/TRY exchange rate increased by 3% (depreciation) continuing to impact the prices of basic commodities.
- The rate of depreciation has decreased in the last months following a period of volatility related to the economic crisis in Türkiye and particularly surrounding the election in May 2023.
- Since then some confidence in the Turkish Lira (TRY) has returned with the introduction of more traditional monetary policies aimed to curb inflation in Türkiye.³ This seems to have reduced some price volatility in NWS for the time being.
- There was very little variation in reported informal exchange rates across assessed sub-districts indicating price variation in for certain commodities such as water trucking, hygiene items, and cooking fuels are more reflective of local supply chain dynamics in these areas.

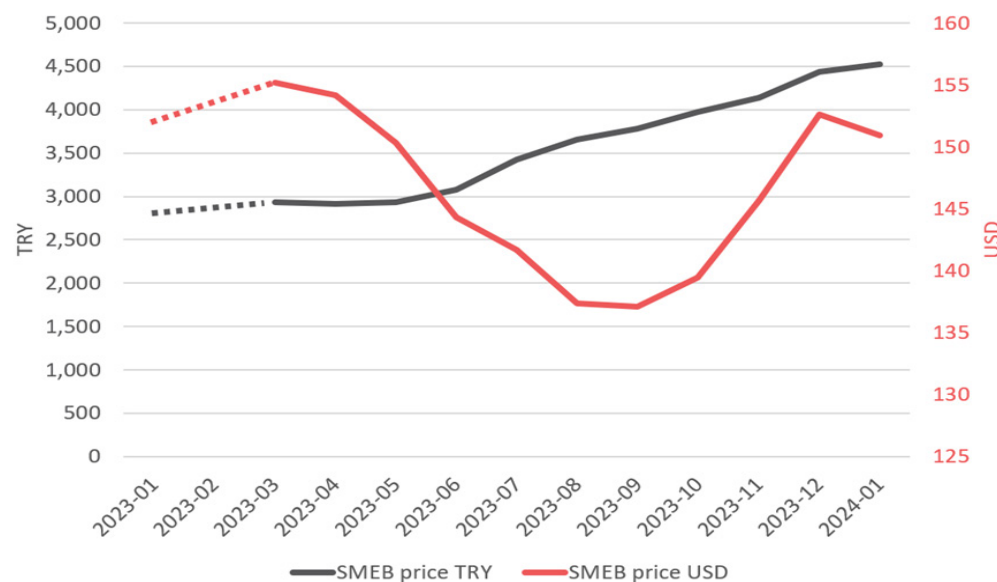
58%

The value of the TRY has depreciated by 58% in the past year.

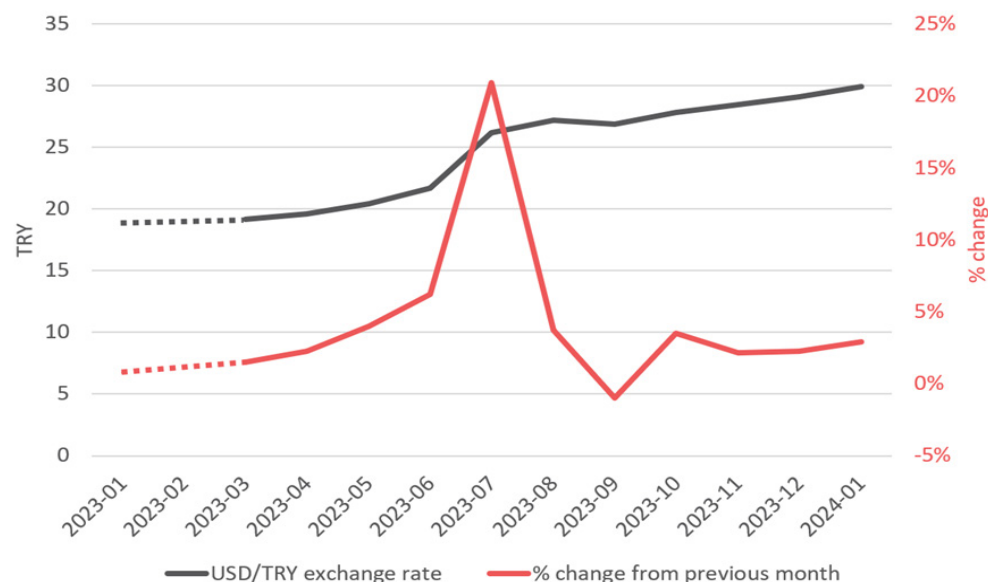
61%

The cost of the SMEB in TRY has increased by 61% in the past year.

Regional median SMEB price, TRY and USD*

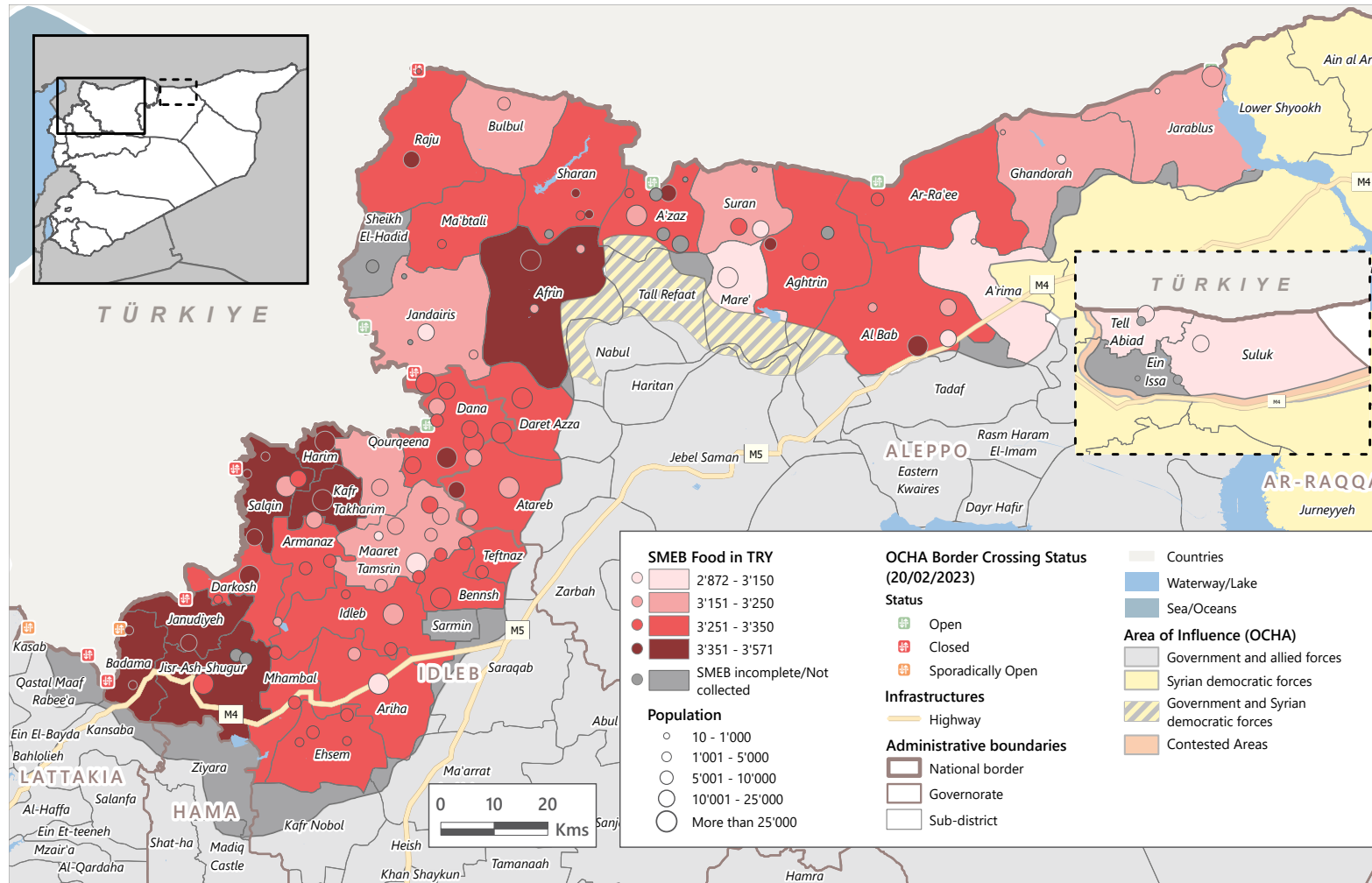


Regional median USD/TRY informal exchange rate trend*



2 * No data was collected in February 2023 due to the earthquakes. This period is represented by a dotted line on the graph.

SMEB food prices, TRY



Price of SMEB Food, sub-district, TRY

| Location | Median Price TRY | Change since Dec 2023 |
|---|------------------|-----------------------|
| Aleppo governorate | | |
| Afrin | 3,382 | 0% |
| Aghtrin | 3,340 | ▲3% |
| Al Bab | 3,272 | ▲7% |
| A'rima | 3,044 | ▲2% |
| Ar-Ra'ee | 3,335 | ▲2% |
| Atareb | 3,282 | ▲3% |
| A'zaz | 3,350 | ▲3% |
| Bulbul | 3,229 | ▼-2% |
| Daret Azza | 3,328 | ▲4% |
| Ghandorah | 3,213 | ▼-1% |
| Jandariss | 3,234 | ▲2% |
| Jarablus | 3,250 | ▲1% |
| Ma'btaki | 3,295 | ▼-1% |
| Mare' | 3,038 | ▲1% |
| Raju | 3,321 | 0% |
| Sharan | 3,292 | ▲4% |
| Suran | 3,245 | ▲2% |
| Idleb governorate | | |
| Ariha | 3,286 | ▲4% |
| Armanaz | 3,322 | ▲2% |
| Badama | 3,417 | ▲4% |
| Bennsh | 3,276 | ▲3% |
| Dana | 3,295 | 0% |
| Darkosh | 3,334 | ▲1% |
| Ehsem | 3,302 | ▲1% |
| Harim | 3,397 | ▲5% |
| Idleb | 3,279 | ▲4% |
| Janudiyeh | 3,377 | ▲1% |
| Jisr-Ash-Shugur | 3,357 | ▲5% |
| Kafr Takharim | 3,369 | NA |
| Maaret Tamsrin | 3,234 | ▲1% |
| Mhambal | 3,302 | 0% |
| Qourqeena | 3,247 | ▲3% |
| Salqin | 3,385 | ▲4% |
| Teftnaz | 3,321 | ▲3% |
| Raqqah Governorate (Peace Spring area) | | |
| Tel Abaid | 2,880 | ▲2% |
| Suluk | 2,872 | ▲1% |

Food prices trends

Overall, surveyed vendors in areas where food prices were highest did not necessarily more commonly report challenges securing supplies. This indicates that while price inflation continues to impact affordability of commodities, supply chains broadly remain functioning in NWS.

Price increases across sub-districts were relatively uniform. In some areas such as Al-Bab sub-district food prices increased above the regional average. While the majority of surveyed vendors in Al Bab sub-district reported facing no supply challenges, 6% (17 vendors) reported that border crossing closures were impacting their supply processes.

Food prices have increased over the past

months in areas such as Harim and Salqin close to the Bab al Hawa border crossing where comparatively more competitive prices might be expected. Trends in these areas should continue to be monitored as the reduction in food aid coming through the border crossing takes effect over the coming year, potentially impacting the local economies that have built up around the cross-border response.⁴

Food prices trends

The price of fresh vegetables continued to climb between December 2023 and January 2024 as local produce is out of season and reliance on imports is high. While seasonal increases in the price of vegetables has been observed annually through JMMI, the last few years have seen peak prices each winter far surpassing the previous year. A lack of greenhouses in NWS due to prohibitive investment costs keeps reliance on imports high in winter months⁵, while other factors such as increased transportation costs and currency depreciation continue to put pressure on prices.

The price of monitored bulk food items continued to increase in tandem with currency depreciation. At the same time the regional median price of subsidised bread increased by 27%. Trends across governorates vary as a result of different subsidy regimes and NGO support. The price of subsidised bread in Idleb governorate in January was generally higher than other assessed areas.

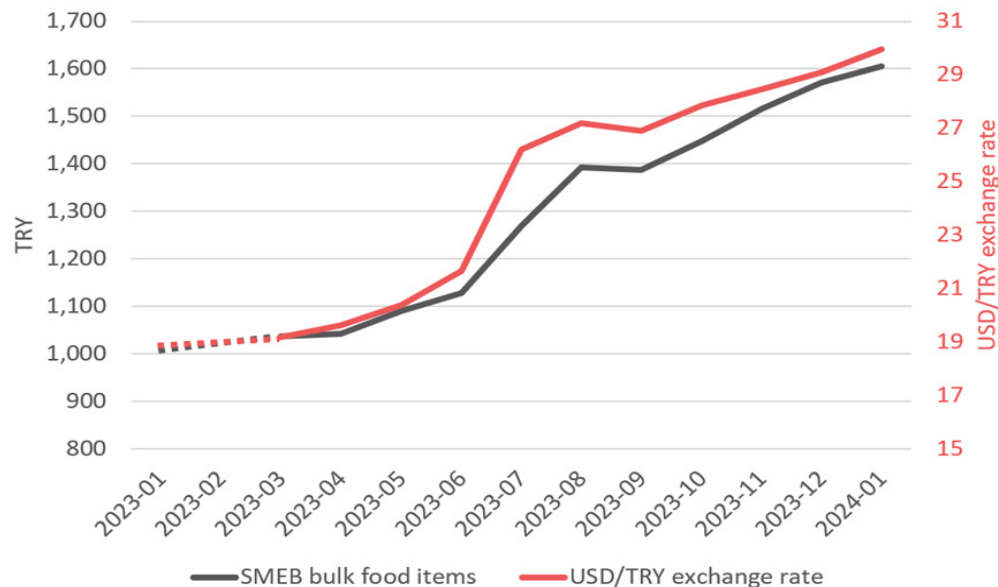


58% of surveyed vendors in January reported that subsidised bread was not available in their community



9% of surveyed vendors in January reported that unsubsidised bread was not available in their community

Regional median price of SMEB bulk food items, TRY



Governorate level median price of SMEB vegetables, TRY



Food price changes

| Item | Unit | Median Price TRY | 1-month change (TRY) | 6-month change (TRY) | Median Price USD** |
|------------------------|------|------------------|----------------------|----------------------|--------------------|
| Food items | SMEB | 3,295 | ▲3% | ▲33% | 110 |
| Bulk food items | SMEB | 1,606 | ▲2% | ▲27% | 54 |
| Bulgur | 1kg | 18 | ▲1% | ▲8% | 0.61 |
| Red lentils | 1kg | 30 | ▲5% | ▲41% | 1 |
| Rice | 1kg | 25 | ▲2% | ▲27% | 0.83 |
| Salt | 500g | 5 | ▲11% | ▲69% | 0.17 |
| Sugar | 1kg | 28 | ▼-5% | ▲11% | 0.92 |
| Tomato paste | 1kg | 45 | ▲3% | ▲19% | 1.49 |
| Vegetables | SMEB | 176 | ▲6% | ▲132% | 56 |
| Tomatoes | 1kg | 17 | ▲8% | ▲244% | 0.57 |
| Potatoes | 1kg | 9 | ▼-10% | ▲52% | 0.30 |
| Cucumbers | 1kg | 25 | ▲14% | ▲407% | 0.83 |
| Onions | 1kg | 10 | ▲27% | ▼-4% | 0.32 |
| Cooking oils | SMEB | 277 | ▼-1% | ▲25% | 9 |
| Ghee | 1kg | 43 | ▼-5% | na | 1.43 |
| Vegetable oil | 1L | 36 | ▲3% | ▲14% | 1.20 |
| Poultry | | | | | |
| Chicken | 1kg | 58 | ▲8% | ▲30% | 2 |
| Eggs | 1kg | 90 | ▲5% | ▲57% | 3 |
| Bread | | | | | |
| Unsubsidised bread | 8pc | 10 | 0% | na | 0.33 |
| Subsidised bread | 8pc | 7 | ▲27% | na | 0.23 |

*No data was collected in February 2023 due to the earthquakes. This period is represented by a dotted line on the graph.

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

Cooking fuels

Median gas prices in assessed areas remained stable between December 2023 and January 2024 given reliance on imports from Türkiye. JMMI data indicates that this reliance on Türkiye has so far protected the region from spill-over effects from Northeast Syria (NES) following the disruption of the major gas plant since October 2023.⁶

This is particularly important for household access to cooking fuels given manually refined kerosene was reportedly widely unavailable. In Idleb governorate field teams have been unable to collect kerosene prices since October 2023 due to widespread unavailability.



80% of surveyed vendors in January reported kerosene was not available in their community



76% of KIs in Humanitarian Situation Overview Syria January round reported that markets exist and food is available but households cannot afford essential food items⁷

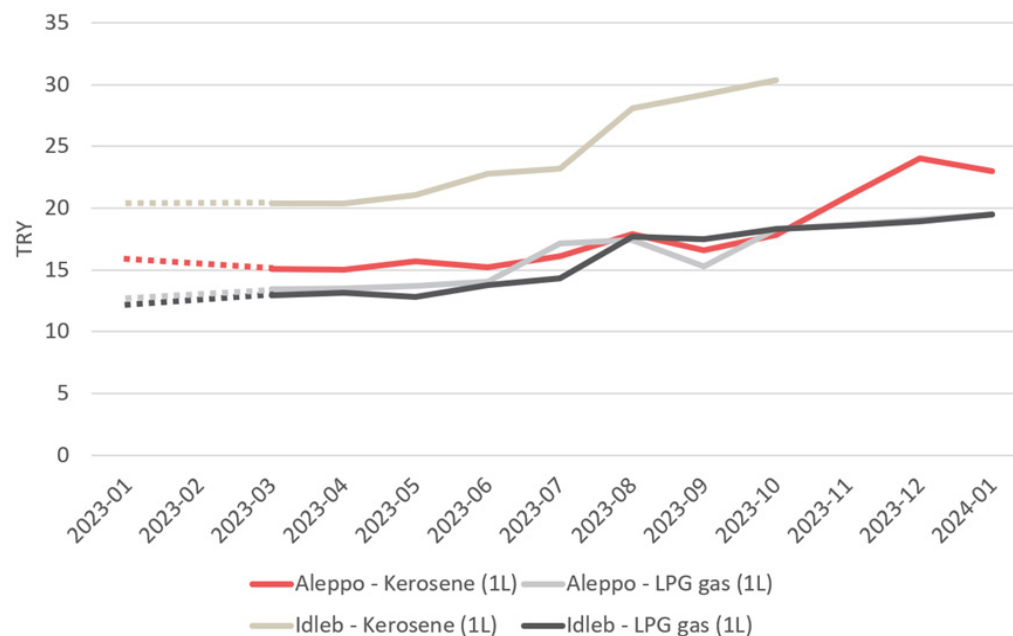
Non-food items

| Item | Unit | Median Price TRY | 1-month change (TRY) | 6-month change (TRY) | Median Price USD** |
|-----------------------|------|------------------|----------------------|----------------------|--------------------|
| Non-food items | SMEB | 252 | ▲10% | ▲20% | 8 |
| Bathing soap | 1pc | 10 | ▲5% | ▲69% | 0.33 |
| Sanitary pads | 10pc | 12 | ▲9% | ▲22% | 0.40 |
| Toothpaste | 100g | 17 | ▼-1% | ▲7% | 0.57 |
| Laundry powder | 5kg | 26 | ▲3% | ▲9% | 0.86 |
| Dish soap | 1L | 18 | ▲14% | ▲21% | 0.61 |
| Cooking fuels | SMEB | 390 | ▲3% | ▲19% | 13 |
| Kerosene | 1L | 22 | ▼-7% | ▲28% | 0.72 |
| LPG gas | 1L | 20 | ▲3% | ▲20% | 0.65 |
| Water trucking | SMEB | 153 | ▲13% | ▲25% | 5 |
| Water trucking | 1L | 0.03 | ▲13% | ▲25% | 0.001 |
| Internet | | | | | |
| Mobile data | 1gb | 102 | ▼-2% | na | 3.42 |

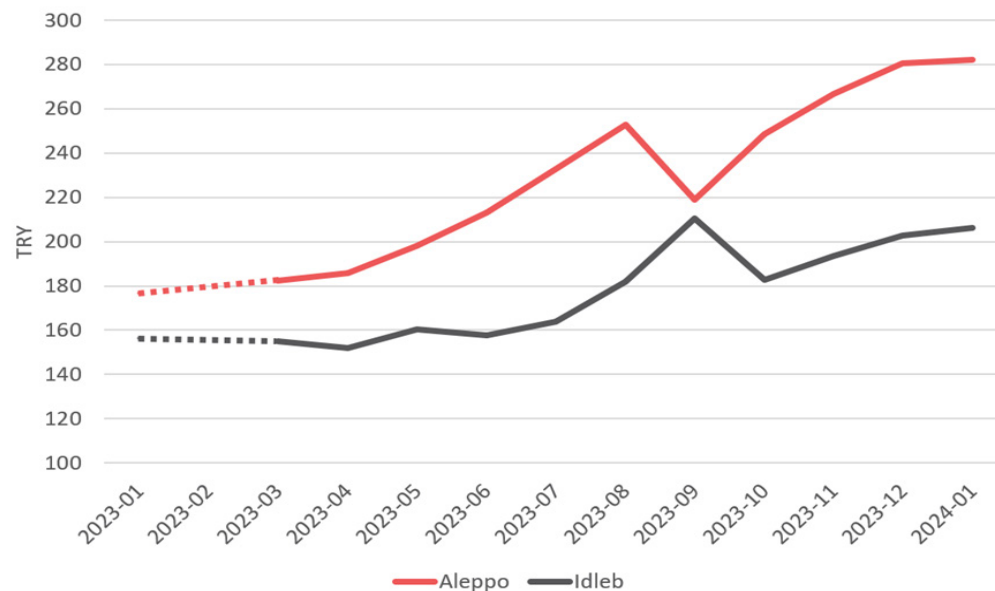
Non-food item price trends

The price of hygiene items overall increased by 10% and are particularly high in Northern Aleppo. Notably the regional median price of dish soap increased by 14% and the median price of sanitary pads increased by 9%, disproportionately impacting women. While the regional median trend for hygiene items overall has increased in line with currency depreciation, different factors seem to be impacting the price of certain items in Northern Aleppo particularly.

Governorate level price of cooking fuels, TRY*



Regional price of SMEB hygiene items, TRY*



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

Water trucking price trends

Water trucking prices overall increased by 13% between December 2023 and January 2024. In particular water prices in Idleb have increased by 62% in the last year. In comparison to other monitored commodities, water trucking prices vary more considerably from community to community. While there are some seasonal trends when usage is higher in the summer, prices do not necessarily track fuel price trends as one of the major operational costs of water trucking services. Other factors could be impacting water trucking prices at the local level including different levels of NGO support provided to distribute water, varying access to sufficient water from the source, and the level of price regulation implemented by authorities.

SMEB water trucking prices, TRY

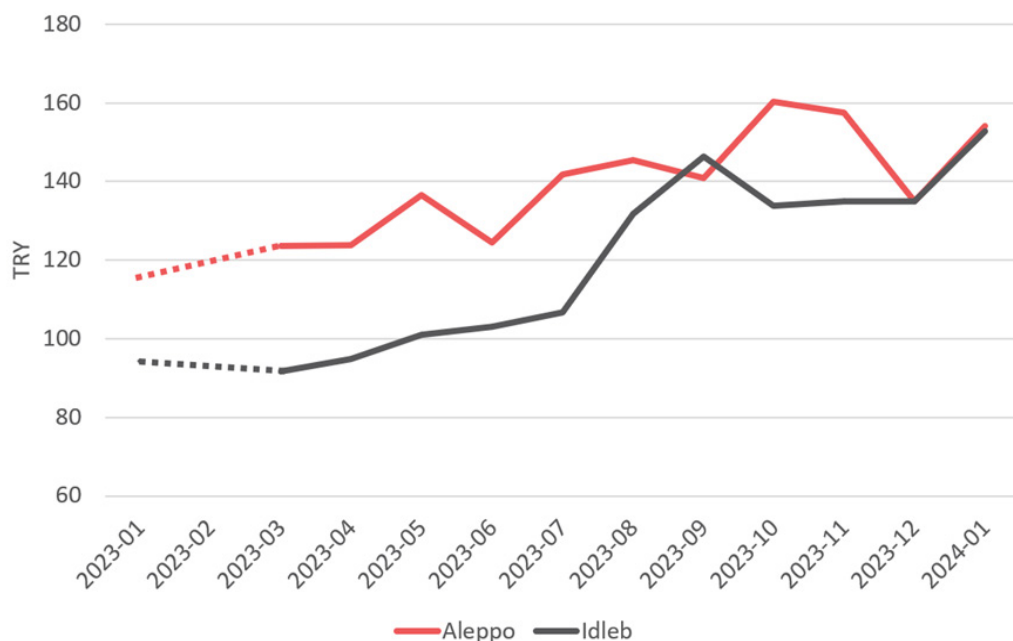
| Transportation fuels | Unit | Median Price TRY | 1-month change (TRY) | Median Price USD** |
|-------------------------|------|------------------|----------------------|--------------------|
| Imported petrol | 1L | 38 | ▲3% | 1.23 |
| Imported diesel | 1L | 32 | ▲3% | 1.03 |
| Manually refined petrol | 1L | 24 | 0% | 0.77 |
| Manually refined diesel | 1L | 19 | ▼-5% | 0.61 |

Transportation fuel price trends

Fuel prices, which are largely fixed in NWS, remained relatively stable. Interestingly the impact on the price and availability of locally produced transport fuels in NWS has not been as notable as anticipated since the attacks on oil facilities in NES that started in October 2023 and subsequent market shortages of manually refined fuels produced in NES.⁸ Some changes have been observed where for example, in January 62% of vendors reported unavailability of manually refined petrol in their community, the price of which increased overall by 9% since November 2023.

However, according to REACH field teams availability of imported fuels from Türkiye is widespread and sufficient such that the shortages from NES have not substantially impacted supply chains or access to fuel. This is quite a shift considering an earlier study by iMMAP that found that NWS was heavily dependent on fuels from NES.⁹ In addition, in 2022 during the conflict between authorities in Greater Idleb and Northern Aleppo, JMMI data showed shortages of fuel in Greater Idleb where the supply route was disrupted from NES through Northern Aleppo. Thus while some impacts of the fuel crisis in NES have been felt in NWS, the data suggests increased reliance on imported fuels from Türkiye, albeit at higher prices, have softened the impact somewhat.

Regional median price of SMEB water trucking, TRY*



62% of surveyed vendors in January reported manually refined petrol which is produced locally in Northeast Syria was not available in their community

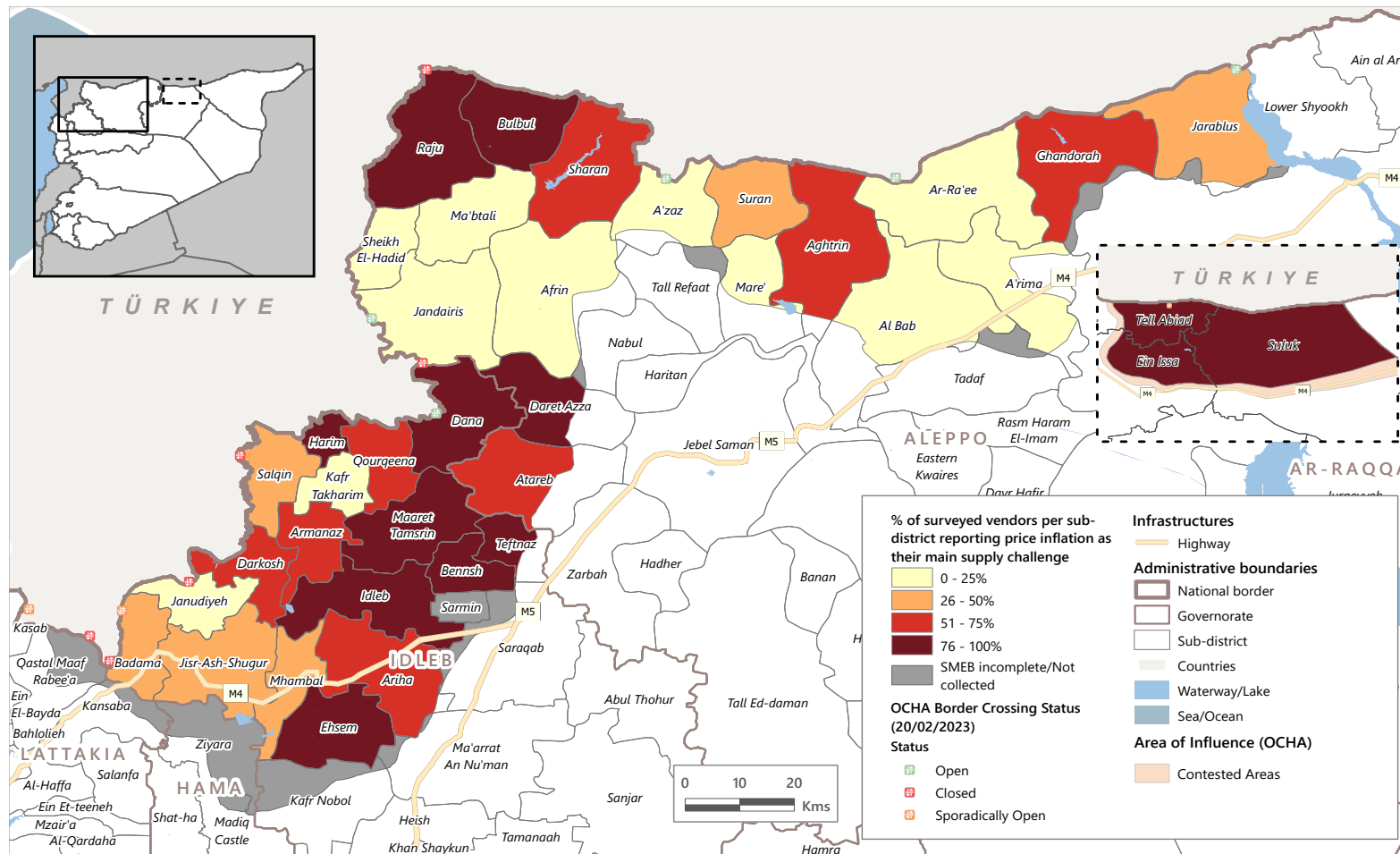
59% of HSOS assessed communities in January where KIs reported lack of transportation to markets was a barrier to physically accessing food markets¹⁰

45% of HSOS assessed communities in January where KIs reported private water trucking was the most common source of water for all purposes¹⁰

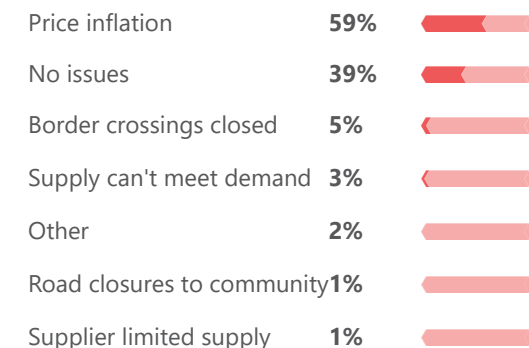
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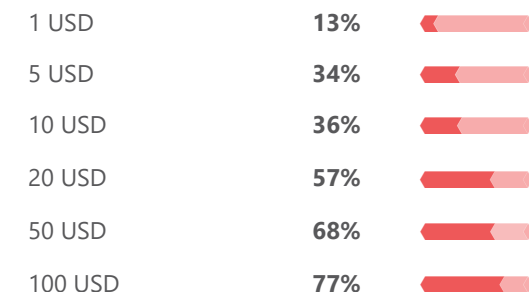
% of surveyed vendors reporting price inflation impacts their capacity to secure stocks



Supply challenges, % of surveyed vendors



% of vendors reporting limited USD denominations



Supply challenges

Price inflation remained the most commonly reported supply challenge in January 2024 reported by 59% of surveyed vendors. Over a third of vendors reported facing no challenges securing supplies at all. Together these findings indicate supply chains in NWS broadly remain functional and the price volatility is the primary factor inhibiting market functionality.

Vendors in the Turkish controlled areas of Ar-Raqqa governorate more commonly reported challenges with border crossings and road closures; 82% of surveyed vendors in this area reported on both of these supply challenges.

This result is similar to previous months and reflects the particular nature of the area where trade crossings with the Syrian Defence Force controlled NES have been closed since the expansion of Turkish control in 2019.

Availability of USD notes remains a challenge impacting vendors ability to import certain goods. In particular, shortages of lower denominations is a key concern for cash implementing actors when the transfer value requires availability of smaller notes such as 10s and 20s.

January data indicates that availability of lower denominations is a particular concern in Aleppo and Ar-Raqqa governorates.

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 in the first week of every month.
- 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.

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 NES Forum, [Escalation of Hostilities targeting Critical Civilian Infrastructure in Northeast Syria](#), 29 December 2023
- 2 Malcolm H.Kerr Carnegie Middle East Center, [Tormented Territory: The Emergence of a De Facto Canton in Northwestern Syria](#), October 2023
- 3 The National News, [Turkey's new policies to bring down inflation](#), Finance Minister says, October 25 2023
- 4 Malcolm H.Kerr Carnegie Middle East Center, [How the Small Town of Sarmada Became Syria's Gateway to the World](#), 2 June 2021
- 5 Enab Baladi, [Greenhouse farming expands in Northern Syria](#), 21 February 2024
- 6 NES Forum, [Escalation of Hostilities targeting Critical Civilian Infrastructure in Northeast Syria](#), 29 December 2023
- 7 REACH, [Humanitarian Situation Overview Syria](#), Northwest Syria, January
- 8 NES Forum, [Escalation of Hostilities targeting Critical Civilian Infrastructure in Northeast Syria](#), 29 December 2023
- 9 Information Management Resource Center, [Fuel Study](#), North Syria, 2019
- 10 REACH [Humanitarian Situation Overview Syria](#), HSOS, NWS, January 2024

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.

REACH

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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 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.

