

Earthquake Response

Joint Rapid Assessment of Markets

April 2023 | Northwest Syria

CONTEXT & RATIONALE

In response to the February 2023 earthquakes that struck Northwest Syria (NWS), humanitarian organisations have been working to determine how to procure, transport, and deliver assistance as well as the viability of multi-purpose cash assistance (MPCA). MPCA can potentially mitigate some of the logistical challenges associated with in-kind aid and it offers crisis-affected people more independence to decide on the essential items they need. Market functionality may not always be a necessary pre-condition for MPCA which, as the earthquakes have shown, is used by communities beyond securing basic food needs for example to access transportation or support services. However, determining the feasibility of cash assistance remains an important area of assessment to guide the response. If markets are damaged or destroyed or are unable to maintain stock due to broken supply chains, then operational actors will take this into consideration. The first round of the JRAM (14-16 February)¹ provided a basic understanding of market functionality immediately after the earthquakes. This round (3-6 April) aimed at monitoring the impact of the earthquakes on markets two months on and capture key information gaps from the Joint Market Monitoring Initiative (JMIMI) which is currently being reviewed to pilot inclusion of a more comprehensive Market Functionality Score.²

76%

of consumer KIs reported they faced financial barriers in physically accessing the market and paying for the goods they need.

Most commonly reported financial barriers, as percentage of consumer KIs

Cannot afford the items available/prices are too high	59%
Public transportation is too expensive	24%
Reduced access to purchasing goods on credit since the earthquakes	19%
Fuel for own vehicle is too expensive	9%
Reduced opening hours of financial service providers	7%
Access to financial service providers is limited for women	2%

KEY MESSAGES

- Two months since the earthquakes, **assessed markets were in general reported as physically and socially accessible to consumers**. However, access to markets appears more difficult for certain groups including **women, older people, people with disabilities, and people with chronic health conditions**, and consumers reported feeling unsafe at marketplaces in several communities as a result of both earthquake-related and human-related security factors.
- While physical access to markets did not appear to be a predominant issue, **unaffordability of items and limited access to purchases on credit** impact consumers' ability to purchase essential items to cover basic needs.
- March JMIMI price data showed that two months on, **prices of key commodities continued to rise at rates similar to before the earthquakes** supporting JRAM findings that **supply chains were functioning and most monitored items were available** in the market. Nonetheless, the limited availability and increasing prices of certain shelter and winter items in high demand since the earthquakes may negatively affect consumers' ability to access them.
- Most surveyed vendors were reportedly resilient to changes in supply and demand following the earthquakes. However, vendors reported facing more structural financial challenges, such as **maintaining sufficient capital and securing credit**. Further, price inflation and currency depreciation may continue to erode vendors resilience over time.

METHODOLOGY OVERVIEW

Data collection was conducted by REACH and partner organisations from **3 to 6 April 2023** using a predominantly quantitative structured tool that included three open-ended qualitative questions to consumer KIs to explore why they perceive certain groups have had less access to markets since the earthquakes and their personal experience of feeling unsafe in the marketplace. **812 Key Informant (KI) interviews were conducted with retailers (338 KIs), wholesalers (89 KIs), and consumers (385 KIs) across 22 communities.** Per community, on average, 17 consumers, 15 retailers and 4 wholesalers were interviewed.

Assessment coverage included communities affected by the earthquakes (either directly or by internally displaced persons (IDP) arrivals) and also identified as key 'market hubs' in the 2021 REACH NWS Market Network Analysis (MNA) that surrounding communities rely on to purchase basic commodities. Coverage of these markets provides an indicative picture of market functionality in the assessed communities. Sampling of KIs took place by visiting, in person, main marketplaces within these communities. Vendors (both retailers and wholesalers) were targeted based on the criteria that they sell basic commodities including basic food items, basic hygiene items, shelter

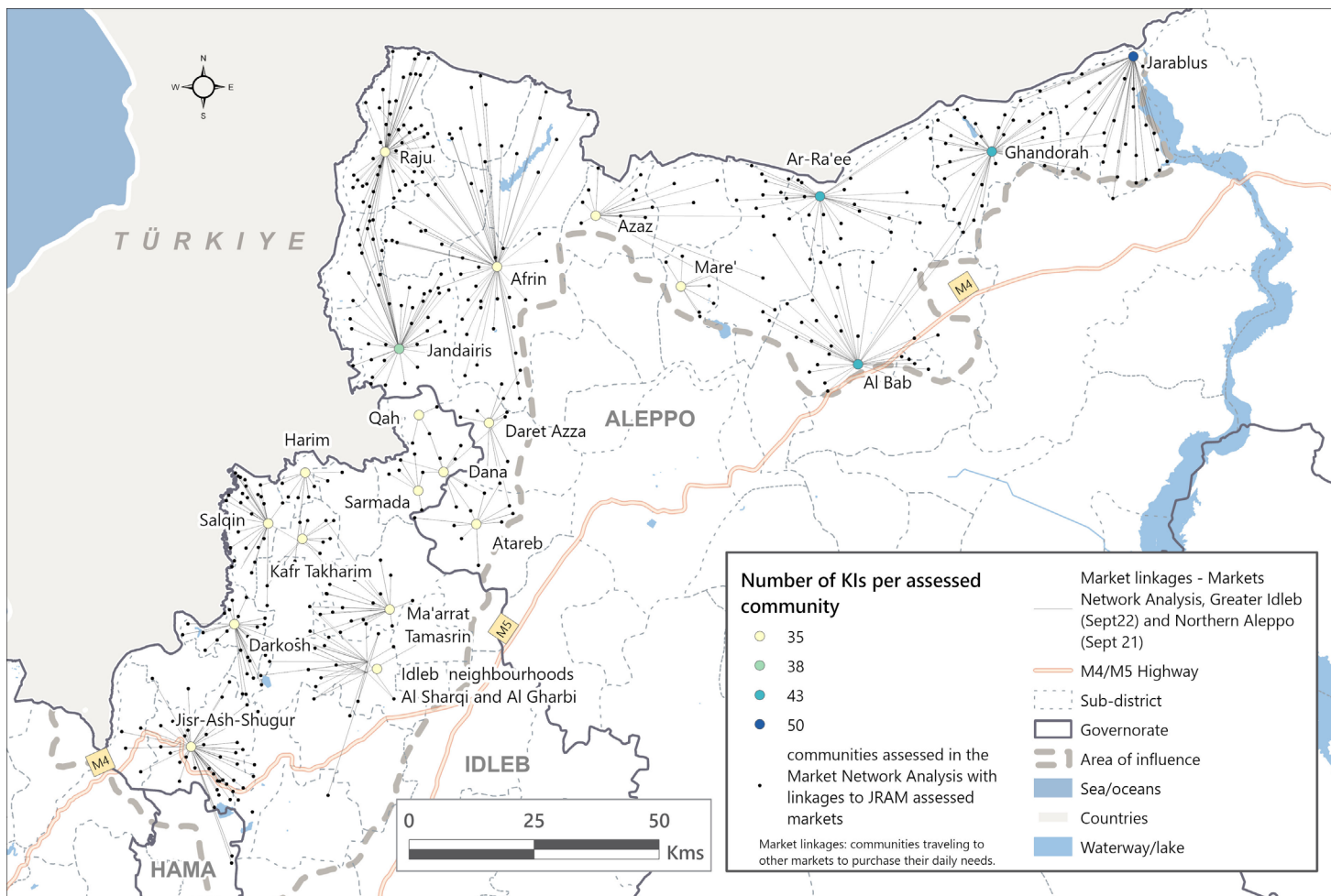
items, winter items, and fuel items. Consumers were targeted at marketplaces, noting the **bias of the sample to consumers that already have access to the marketplace**; findings therefore potentially do not capture the perspectives of those currently unable to access markets. The consumer sample within each community included 50% male consumers and 50% female consumers. This sampling strategy targeting vendors and consumers allowed for a disaggregated indication of findings according to gender and commodity type. For more details see the [Terms of Reference](#).

Further analysis

A separate **analysis file** provides a user-friendly display of all indicators, grouped according to four key market functionality dimensions (accessibility, availability, affordability and resilience). Users can see tables and graphs across indicators showing reporting by number of KIs, and can filter for individual communities of interest. Where relevant, users can also filter by consumer gender and vendor type (retailer or wholesaler).

Taking these findings this **Situation Overview** provides a summary narrative analysis of the assessment, showing key indicators as percentages of KIs surveyed.

Map 1: Communities depending on markets assessed in the JRAM, according to the REACH Market Network Analysis



Affordability

Financial barriers

The findings indicate that consumer’s access to the market was more constrained by financial issues (76%) than physical or social barriers (24%). Primarily, consumers reported that the prices of goods are too expensive for them to afford (59%). Similarly, of the retailer KIs that reported a decrease in the number of customers visiting the marketplace since the earthquakes (136 KIs), the majority reported the decrease was attributed to financial pressures on consumers including having less money to spend, increased prices, and currency depreciation. Of those retailer KIs who reported an increase in customers in the past 7 days compared to before the earthquakes, the majority (79%) reported that this was because of Ramadan indicating increased market activity may be temporary.

Aside from the high prices of essential food and hygiene items, increases in the cost of fuel impacts the cost of transportation. Transportation related barriers were reported as an issue by consumers for public transportation (24%) and private vehicles (7%). Several consumer KIs commented during interviews that as a result of such financial pressures and fear of further disasters and displacement they have reduced their spending to just secure basic necessities and save what cash they have. Female consumers reported slightly more frequently than males (11% difference) that financial factors affect their ability to travel to the market and pay for goods, as well that items at the marketplace are too expensive/too high to afford (12% difference).

Access to purchases on credit

Households in assessed communities had limited access to purchases on credit as a coping mechanism to mitigate the continued price inflation or increased expenditures as a result of the earthquakes. The large majority of retailer KIs (85%) had declined most of the requests for purchases on credit in the 7 days before data collection. In addition, consumer KIs reported that access to credit has been reduced since the earthquakes (19%). Such limited access is found within a context where the demand for credit purchases has increased since the earthquakes, according to 59% of the retailers in the February JRAM and 38% of retailers in the April round. Retailers are subject to the same income and cash shortages as well as reconstruction expenditures as the rest of the community, and they themselves are operating without the cushion that would enable them to extend credit. Such findings from both the consumer and retailer perspectives demonstrate the need for cash in earthquake-affected communities that were already struggling before the disaster.

64%

of retailer KIs reported that they fulfilled ‘none’ or only a ‘few’ of the requests for purchasing on credit in the past 7 days

76%

of consumer KIs reported they faced financial barriers in physically accessing the market and paying for the goods they need.

Figure 1: Most commonly reported financial barriers, as percentage of consumer KIs*

Cannot afford the items available/prices are too high	59%
Public transportation is too expensive	24%
Reduced access to purchasing goods on credit since the earthquakes	19%
Fuel for own vehicle is too expensive	9%
Reduced opening hours of financial service providers	7%
Access to financial service providers is limited for women	2%

HSOS data from March showed that in the communities assessed in the JRAM, **respondents overwhelmingly reported unaffordability as a barrier preventing access to food** for both host community households (17/22 communities) and IDP households (20/22 communities).

Figure 2: Proportion of requests for purchasing on credit that were fulfilled in the last 7 days, as a percentage of retailer KIs

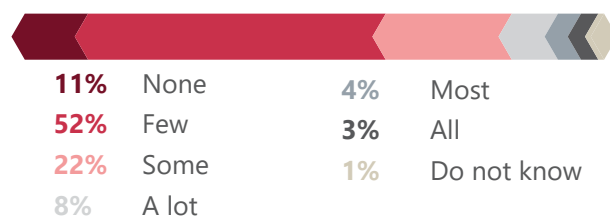
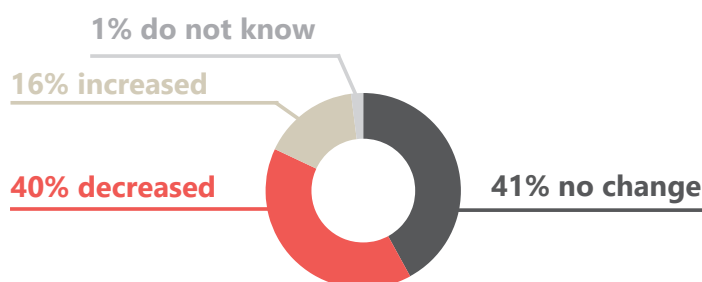


Figure 3: Change in the number of customers in the last 7 days compared to before the earthquakes, as a percentage of retailer KIs



* KIs could select multiple responses and therefore values may sum to more than 100.

Pre versus post-earthquake price trends

JMMI March data shows that prices of key commodities continued to rise at rates similar to before the earthquakes supporting other findings that, two months on, supply chains are still functioning or have recovered from any initial disruption, and items broadly remain available. Nevertheless ongoing inflation in Türkiye and depreciation of the Turkish lira (TRY) continues to put pressure on prices of basic commodities. The February round of JRAM found that prices of key items were relatively stable, with more notable price increases for key items in high demand. Higher price increases for such items including blankets and plastic sheeting were again observed in March JMMI data.

Some communities assessed in the JRAM saw notably higher increases post-earthquake compared to others (Figure 7). Several factors could be impacting prices in these communities including the extent of earthquake damage, cross-line transportation dynamics between Greater Idlib and Northern Aleppo, IDP arrivals and changes in demand, aid targeting, and damage to winter crops and agricultural losses.

Continued inflationary trends remain a challenge across NWS impacting affordability of basic items, as cited by 59% of consumer KIs. This seems to have caused a reduction in customers for 40% of assessed retailers.

Figure 4: Average price changes before (January) and after (March) the earthquakes across NWS and JRAM communities in USD and TRY*

	SMEB total ¹	Vegetables	Gas	Hygiene items	Bulk foods
JRAM assessed communities (22)					
USD	5%	36%	6%	3%	3%
TRY	5%	38%	8%	5%	4%
NWS JMMI assessed communities (107)					
USD	1%	31%	4%	1%	0.3%
TRY	3%	33%	6%	3%	2%

SMEB contents

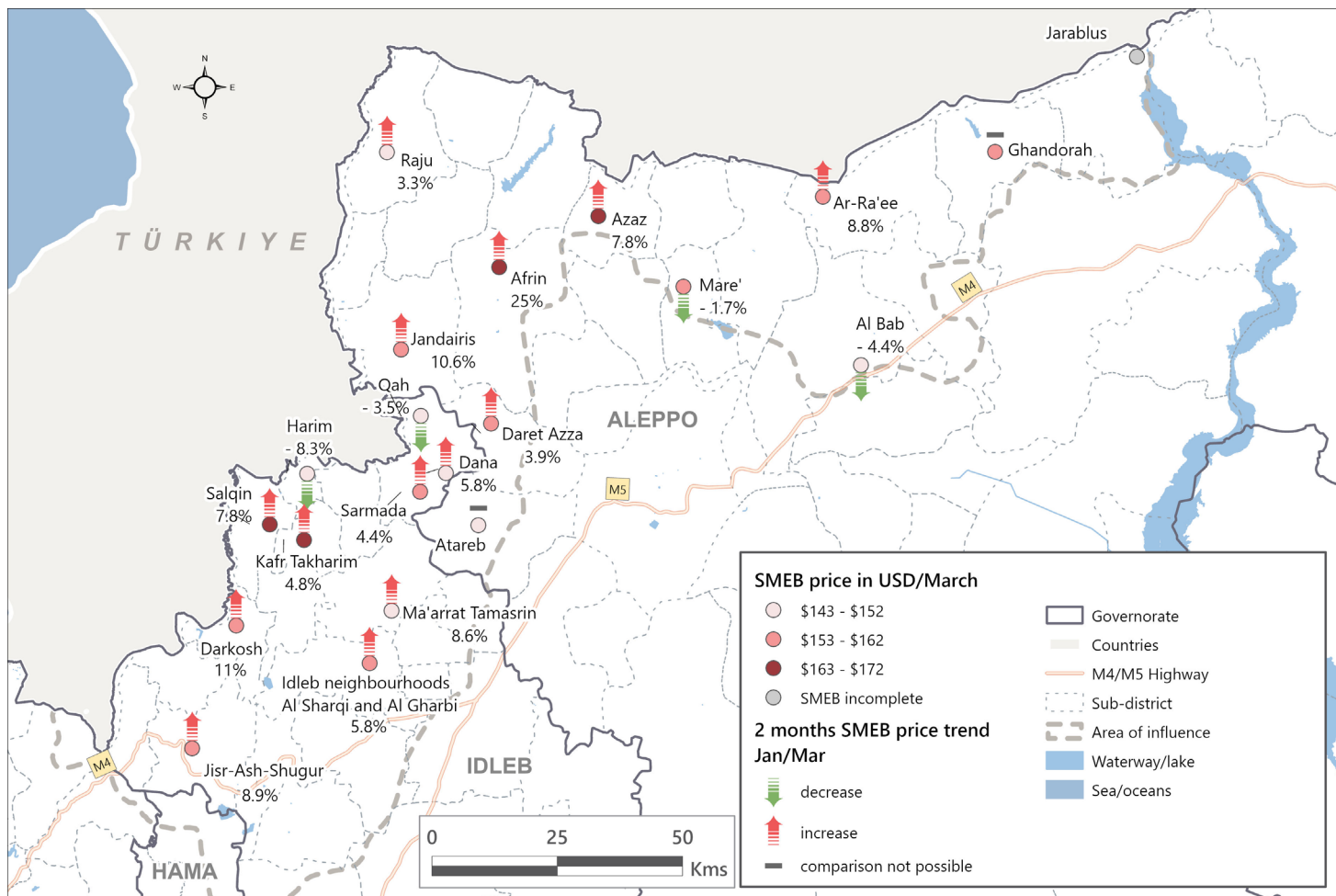
Food

Bread	37 kg	Rice	19 kg
Bulgur	15 kg	Salt	1 kg
Chicken	6 kg	Sugar	5 kg
Eggs	6 kg	Tomato paste	6 kg
Ghee/veg. oil	7 kg/L	Vegetables (fresh)	12 kg
Red lentils	15 kg		

Hygiene (NFI)

Bathing soap	12 bars	Toothpaste	200 g
Laundry/dish soap	3 kg	Sanitary pads	4 packs of 10

Map 2: Cost of the SMEB in March 2023 and price change before (January 2023) and after the earthquakes (March 2023)*



* Joint Market Monitoring Initiative January and March 2023 data

Vegetable price increases

Notably, the price of the vegetable component of the SMEB increased by 36% in USD across assessed communities. This was largely attributed to increases in the price of onions which may be linked to global and regional trends as opposed to local supply chain issues.¹ The price of monitored vegetables in Türkiye, from where vegetables are largely imported during the winter months, also increased between January and March.² Agricultural damage and losses from the earthquakes as well as changes in supply and demand dynamics may also have put pressure on vegetable prices. A recent Food and Agriculture Organisation of the United Nations (FAO) study found that the majority of community leader KIs reported that despite financial losses farmers were getting higher prices for their products compared to before the earthquakes.³ Agricultural damage and expected decreases in production levels will likely continue to put pressure on vegetable prices in NWS as local production season starts.⁴

Figure 5: NWS SMEB food price trend, USD and TRY*

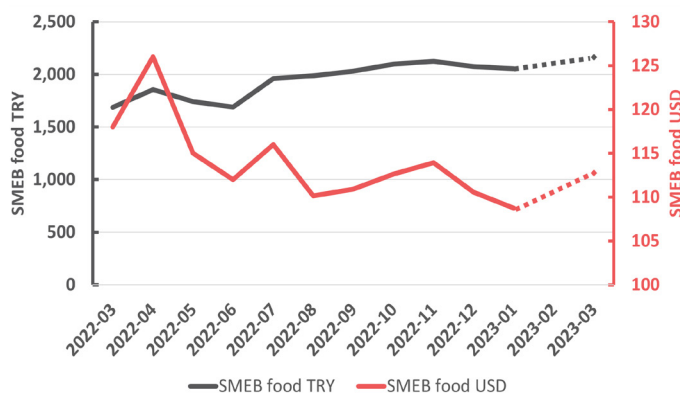


Figure 6: NWS SMEB hygiene items price trend, USD and TRY*

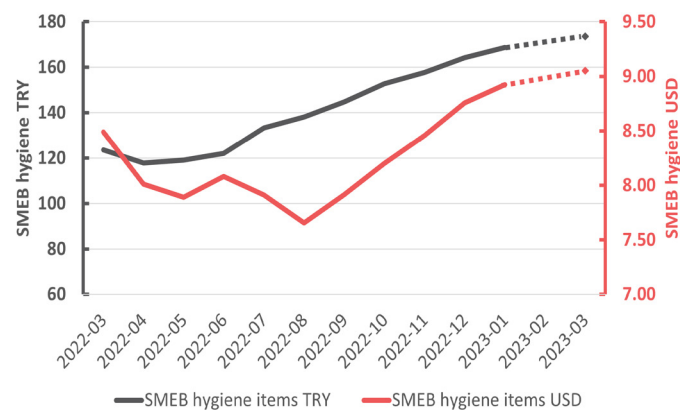


Figure 7: JRAM communities with more than 10% increases in the price in USD of key commodities between January and March 2023

Basic food items

Al Bab	27%
Afrin	22%
Azaz	16%

Basic hygiene items

Jisir-Ash-Shugur	33%
Sarmada	27%
Dana	27%

Winter items

Afrin	36%
Jandarisi	32%
Dana	18%

LPG gas

Darkosh	11%
Daret Azza	10%

Transport fuel

Dana	24%
Azaz	11%

Winter and shelter items

Vendors in both the February JRAM and the April JRAM reported shortages of key items in high demand such as winter blankets, plastic sheeting and tents. Such supply and demand dynamics appear to still be affecting the price of such items two months on from the earthquakes. Between January and March the **price of blankets and plastic sheeting** in USD increased by 28% and 26% respectively.

Sustained increases in price since the earthquakes limits the extent to which households are able to access such items in markets even when available. KIs interviewed in HSOS reported that plastic sheeting was **not affordable** in 15 of the 22 assessed communities and that shelter repairs are too expensive in all JRAM communities, except Atareb. In addition, winter items were reportedly **not affordable** in all assessed communities except Ar-Ra’ee.

* No price data was collected in February due to the earthquakes represented by the dotted line.



Accessibility

Barriers preventing physical access to markets

While the majority of KIs did not report barriers to consumers or vendors physically accessing the marketplace, some communities saw higher reporting on access constraints related to physical damage from the earthquakes, as well as pre-existing challenges such as limited transportation options. Consumer KIs were somewhat more likely to report on physical market access barriers compared to vendor KIs indicating vendors may have limited awareness of the difficulties facing consumers and a factor to be considered in future assessments.

These findings align with REACH March Humanitarian Situation Overview Monitoring (HSOS) data² in which, just under half of surveyed KIs (9) in JRAM assessed communities reported no particular challenges for community members when accessing the market. Of those KIs that did report access challenges, the most frequently reported issue was transportation cost, followed by lack of transportation options and lack of access for persons with restricted mobility.³

The top three communities with the highest percentage of surveyed KIs (including both consumer and vendor KIs) reporting the presence of one or more physical access barriers were **Jarablus, Sarmada, and Qah**.

76%

of consumer KIs reported they did not face physical barriers accessing the marketplace in the last 7 days.

90%

of vendor KIs reported that there had not been any problems that prevented any customers or traders from physically traveling to, working at, or shopping at the marketplace in the last 7 days.

Gendered differences in market access

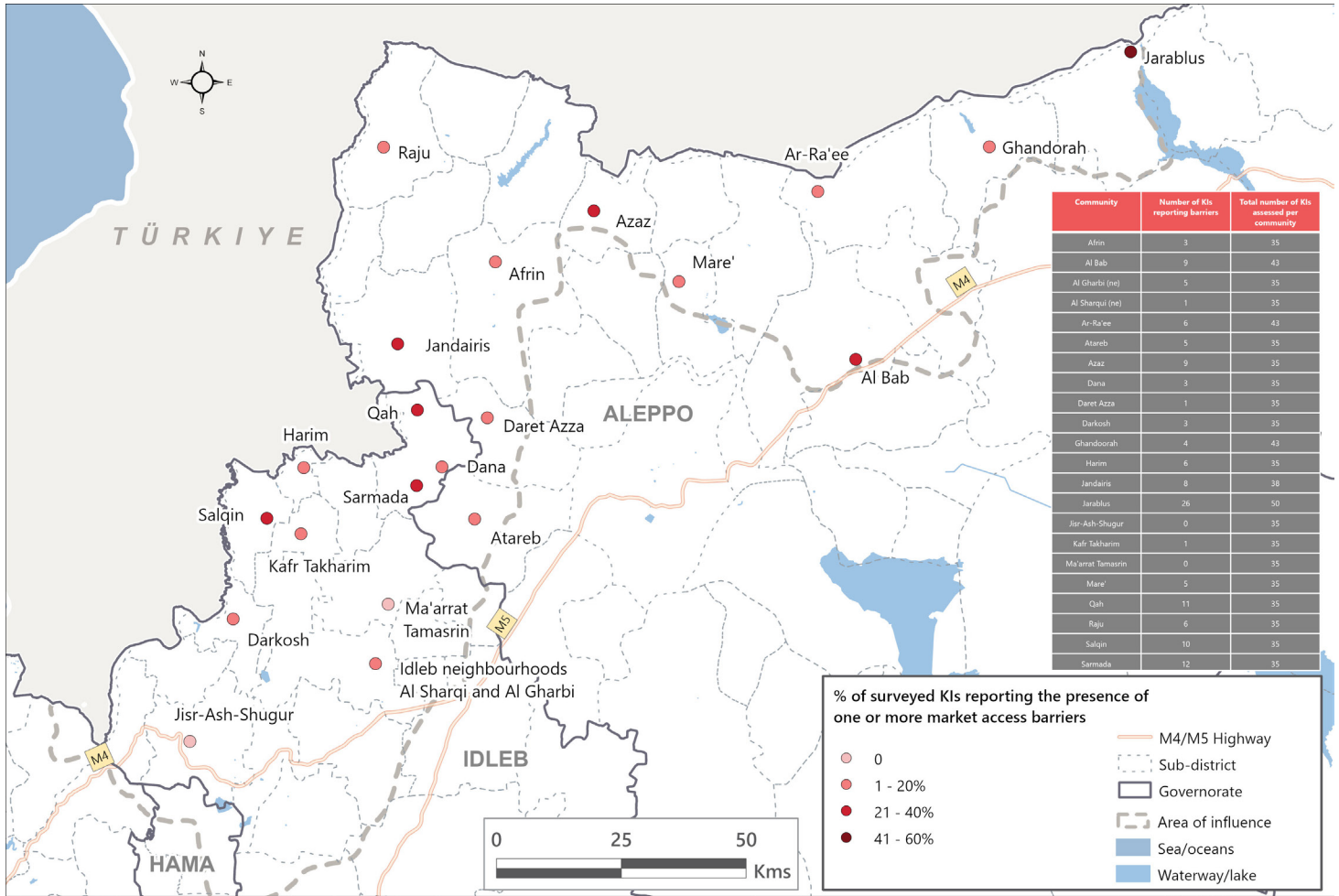
Reporting on market access barriers varied between male and female consumers indicating that while assessed markets are broadly accessible there are important gendered differences. The earthquakes may have exacerbated existing access constraints with women feeling less inclined to leave children or older family members at home while they visit the marketplace, or go to the marketplace with them where there are damaged and unsafe buildings.⁴ These two barriers were most commonly reported by female consumer KIs in Harim community for example, where female consumers reported 7 of the 9 physical barriers in the community.

In addition, female consumers more commonly reported that shopping in the evening was difficult due to the lack of electricity or that they did not feel safe entering or traveling to the marketplace because of insecurity. In Jarablus community for example, of the 10 consumer KIs (of 24 surveyed in total) who reported on these two barriers, 9 were women. The presence of curfew and movement restrictions was the most commonly reported physical barrier to consumers in Azaz community reported by 8/16 KI consumers, all of whom were female. A curfew was declared in Azaz as a result of armed clashes in early April⁵; these findings suggest female consumers' market access was disproportionately impacted by the insecurity and subsequent restrictions.

Figure 8: Most commonly reported market access barriers, as percentage of consumer and vendor KIs

Consumer KIs (n=385)		Vendor KIs (n=427)	
Limited transportation options	10%	Limited transportation options	4%
Hazardous/unsafe buildings	6%	Difficult for people with mobility issues	4%
No one to look after children/older people	5%	Hazardous/unsafe buildings	2%

Map 3: Barriers preventing physical access to markets, percentage of KIs reporting the presence of one or more barriers



Market access concerns for specific groups of people¹

The majority of consumer KIs reported that they were not aware of any specific groups of people who have had more difficulty accessing the marketplace since the earthquakes. The groups that were identified as facing greater market access issues were older people and children, and in particular females, people with disabilities and people with chronic health conditions. Consumer KIs were subsequently asked an open-ended qualitative question on why they think the identified groups have had less access to marketplace since the earthquakes.

Figure 9: Demographic groups reported by consumer KIs who have less market access since the earthquake, as percentage of consumer KIs*

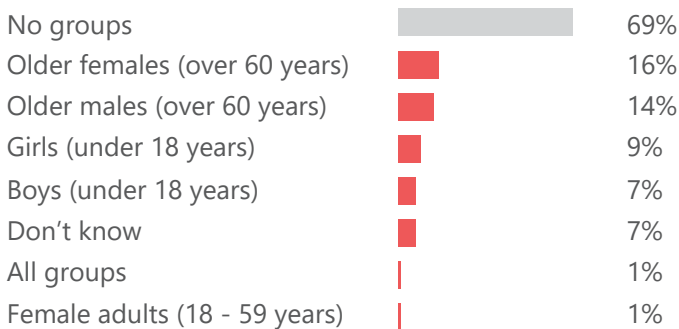
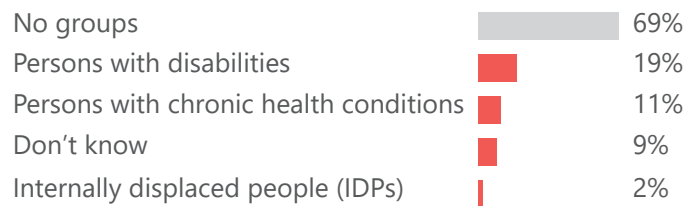


Figure 10: Groups of people reported by consumer KIs who have less market access since the earthquake, as percentage of consumer KIs*



The findings showed that consumer KIs saw that market access for older people as well as people with disabilities has in particular been impacted due to their physical mobility and, in some cases, poor health. Existing physical access issues have reportedly worsened for such groups due to inappropriate or damaged infrastructure in the marketplace, lack of mobility supports, and poor public transportation options for people with mobility support needs. In addition, displacement to areas further away from marketplaces/distance of residence to marketplaces and challenges securing transportation were reportedly issues that disproportionately affect older people, people with disabilities, and people with chronic health conditions. Several consumer KIs noted concerns about the health and safety of these groups in an emergency considering earthquake-damaged or already unsuitable marketplace infrastructure and lack of medical/emergency services.

* KIs could select multiple responses and therefore values may sum to more than 100.

Notably, fear of earthquake-related factors and the psychological impacts of the earthquakes were reported by consumer KIs across all demographic groups, except for adult males, as a factor inhibiting market access. Feelings of unsafety in the marketplace were commonly reported by consumer KIs for children, and in particular girls, whereby children themselves feel afraid, but also their parents were less likely to send them to the marketplace due to fears for their safety. In addition, consumer KIs reported that parents were afraid to go to the marketplace and leave their children at home. Similarly, a few consumer KIs reported feelings of fear and psychological stress have impacted market access for people with disabilities and people with chronic health conditions since the earthquakes.

Lastly, consumer KIs reported that IDPs face market access issues in particular largely due to financial issues noting high transportation costs, lack of access to work, rising prices, and higher expenses for housing.

These consumer findings were largely in line with retailer KI findings that identified the same groups (older people and children, and in particular females, people with disabilities, and people with chronic health conditions) that come less frequently to the marketplace since the earthquakes as well as similar reasons why.

See the social-physical access tab in the [analysis output](#) for a breakdown of these indicators for retailer KIs.

Safety and security concerns - impact on consumers' market access

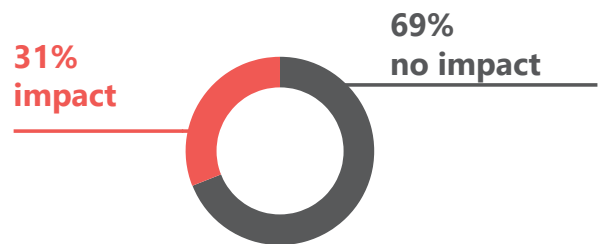
91%

of consumer KIs reported that they had not personally experienced any safety or security concerns that impacted their access to the marketplace in the past 7 days.

Safety and security concerns may be under-reported due to the sensitivity of the topic, especially for women. Nevertheless, of the 33 consumer KIs (9%) who reported personally experiencing safety or security concerns, 85% (28 KIs) were female consumers indicating such factors are disproportionately impacting women.

An open-ended qualitative question was asked to understand in what way such concerns impacted market access. Almost half reported that this was due to earthquake-related factors such as damaged buildings and fear of aftershocks. In addition, just under half of these consumer KIs reported fear of human-related factors including armed clashes, fear of theft, violence, or harassment in the marketplace. Moreover, vendors reporting fear of robbery, looting or violence could indicate general unsafety in the area affecting the broader population. More research is needed to understand if there are **protection risks** in these areas and how these interact with aid-modalities, such as carrying large sums of cash after an aid distribution.

Safety and security concerns - impact on vendors' businesses



Of the KIs reporting that safety/security factors impacted their business (133 KIs)*

- 81% Safety concerns related to the earthquakes (e.g. unstable infrastructure)
- 23% Fear of robbery
- 10% Fear of looting
- 8% Curfews
- 7% Concerns about violence

Does the JRAM identify specific areas with safety and security concerns?

Safety concerns due to the earthquakes were reported by a large proportion of vendor KIs in Afrin (18 of 19 KIs), Salqin (11 of 19 KIs), Raju (11 of 19 KIs), Qah (10 of 19 KIs), Jandarlis (10 of 21 KIs), and Jarablus (12 of 26 KIs).

A fear of/actual robbery was reported by a relatively large proportion of KIs in Raju (9 of 19 KIs), Jarablus (7 of 26 KIs) and Azaz (5 of KIs).

* KIs could select multiple responses and therefore values may sum to more than 100.



Availability

Availability of items in the market

Figure 11: Vendors reporting a shortage of at least one monitored item, as number of vendor KIs selling the monitored commodity group¹

Food	Hygiene	Winter	Fuel	Shelter
3/91	10/99	25/94	8/66	41/87

Overall, both retailers and wholesalers reported good availability of the monitored food, hygiene, winter, fuel and shelter items in the marketplace. The **availability of food improved** since the February JRAM, which found unavailability of basic food items reported by around one-third of retailer KIs (primarily fresh produce, sugar, vegetable oil). By the April round, food was reported as fully available in nearly all (93%) of assessed markets and shortages were rarely reported (3%). Jarablus community was an exception, where 4/5 KIs reported that there was limited availability of basic food items in the marketplace. Hygiene items were not monitored in the February JRAM, but no availability issues were reported in the April round, aside from diapers (7%) and sanitary pads (6%). Unavailability of such items in the market, in particular sanitary pads, disproportionately impacts women.

Shortages of shelter and winter items were substantially less salient in terms of unavailable items by the April JRAM compared to the February JRAM. This indicates that markets were able to absorb a majority of the demand for shelter and winter items in the two months since the earthquakes. However, shortages of tents were still reported by 39% of KIs, followed by blankets (16%) and insulation sheets (10%). In addition, pockets of unavailability were found for winter items in Dana (4/4 KIs), Jarablus (6/8 KIs) and Ar-Ra'ee (2/4 KIs). Such shortages could potentially be linked to redirection of suppliers to areas with comparatively higher IDP influxes.² This unavailability, paired with high prices, may negatively impact consumers' access to such items.

Figure 12: Items most commonly in shortage, as number of vendor KIs who usually sell this item^{1*}

Tents	34/87
Blankets	15/94
Insulation sheeting/foam sheeting	8/87
Baby diapers	7/99
Kerosene diesel heater	7/94
Winter clothes	7/94
Plastic sheeting/tarpaulin	6/87
Fasteners (nails, wedges, ropes, etc.)	6/87
Sanitary pads	6/99
Gas	4/66
Kerosene	4/66

* KIs could select multiple responses and therefore values may sum to more than 100.

93%

of vendor KIs reported almost full availability of the monitored items in the assessed markets.

83%

of vendor KIs reported no changes in the quality and type of items sold

Item quality and type

In addition to relatively good availability of most monitored items, vendors reported little changes (13%) since the earthquakes in the quality or quantity of products sold. Of the vendors that reported changes, vendors selling hygiene items most commonly reported changes (23%). 19% of KIs selling hygiene items reported that the quality of products sold had reduced, compared to 10% of all vendors who reported reduced quality of products.

Notably, 12% of basic food item vendor KIs reported that they had to start stocking cheaper brands, compared to 6% of all vendors. These findings are comparable to reports from consumers, where 8-9% of consumers noted a reduction in quality or cheaper brand in sale.

Only 2% vendors reported that since the earthquakes they had to start stocking more expensive brands; this was reported by hygiene (4 KIs) shelter, (2 KIs) food (2 KIs) vendors. While rarely reported this potentially indicates that at some level supply of and demand for cheaper alternatives were impacted by earthquakes (i.e. increased reliance on more expensive imported products given pressure on local production or greater demand for imported products due to quality concerns). 10% of shelter vendors also reported that the quality of products had reduced since the earthquakes, a key concern for local procurement of shelter items. Only 3% of fuel vendors reported changes in the quality and type of fuels sold.

Figure 13: changes in quality and type of items sold since the earthquakes, as percentage of surveyed vendor KIs

Quality of products is not as good	10%
Had to stock cheaper brands	6%
Supplies are sold in smaller quantities	4%
Had to stock more expensive brands	2%

Resilience

Barriers to keeping businesses running and stocked

Of the vendors reporting challenges to keeping the business running and well-stocked (290 KIs), the most prevalent challenges were of financial nature, such as lack of funds or access to cash (34%), difficulty in ordering stock due high prices from the supplier (22%), and difficulty obtaining sufficient physical bank notes (7%). The month of Ramadan is usually characterised by higher consumption and spending patterns, and shift in types of goods in demand (sweets, gifts, services). This shift in supply and demand was noted as a challenge by 22% of the vendors reporting challenges.

Comparing the challenges reported by vendors between the February and April rounds of JRAM (Figure 14, 15 and 16), it appears that the immediate effects of the earthquakes, e.g., damage to buildings, changes in demand, have diminished.

The top three communities with the highest percentage of vendor KIs reporting the presence of one or more barriers to keeping the business operational and well stocked were **Raju, Jarablus, and Ar-Ra’ee.**

Figure 14: Most commonly reported barriers to businesses re-opening from the February JRAM, of KI vendors reporting shop closures in the community (161 of 386 KIs)¹

Safety concerns due to the earthquakes	59%
Infrastructural damage	24%
Lack of funds	19%

Figure 15: Main barriers to meeting increased demand from the February JRAM, of KI vendors reporting they would not be able to meet a hypothetical increase in demand (50 of 386 KIs)¹

Lack of stock provided by suppliers	57%
Lack of funds	50%
Lack of stock provided by producers	20%

This is likely due to progression of the cleanup process (e.g. rubble clearance on streets, road repairs, demolition of damaged buildings, etc.) while vendors have developed new ways to mitigate their effects, for example by using new supply routes or setting up shop in less damaged areas. Whereas in the February JRAM, infrastructural damage and earthquake-related safety concerns were the most prevalent obstacles preventing businesses from being operational, such impacts from the earthquakes were not commonly reported as issues in the April round.

In addition, supply issues including shortages from suppliers and producers (reported by 57% and 51% of KIs respectively) were the most reported challenges for retailers to respond to demand in the February JRAM. Comparatively, such challenges were only marginally reported in the April JRAM (reported on average by 2% of vendors selling monitored commodity groups). **Financial barriers** however, remained salient in both rounds.

Figure 16: Barriers to keeping the business operational and well stocked, of vendor KIs reporting barriers (290 of 427 KIs)

Lack of funds/access to cash	34%
Price increases at supplier	22%
Ramadan: changes in supply and demand	22%
Difficulty accessing banknotes to pay suppliers	7%
Lack of stock provided by suppliers	4%
Difficulties with cross border imports	3%
Earthquake related damage to shops	2%
Storage capacity reduced since the earthquakes	2%
Lack of supply from producers	2%
Electricity or water services impacted by the earthquakes	1%

Financial barriers to keeping businesses running and stocked

(as reported by KIs who said lack of funds was a barrier to keeping the business running/stocked, n=99, 34% of KIs)

The majority of assessed vendor KIs did not face financial barriers, suggesting that the vendors were able to mitigate financial challenges posed by ongoing inflation, currency depreciation, and the financial cost or reduced income as a result of the earthquakes and from local reductions in consumer demand (page 3). Nonetheless, at least one in five KIs appeared to not have recovered financially from the impact of the earthquakes or were constrained by the overall economic situation. The most notable challenges were the high prices of items from suppliers which require vendors to have more funds to purchase stock as well as a reduction in vendors' savings since the earthquakes.

KIs selling shelter and winter items were more likely to report a reduction of savings since the earthquakes than food, hygiene or fuel vendor KIs. It is possible that vendors used savings to place orders to meet the higher demand for these items, while price inflation increased the cost of the orders.

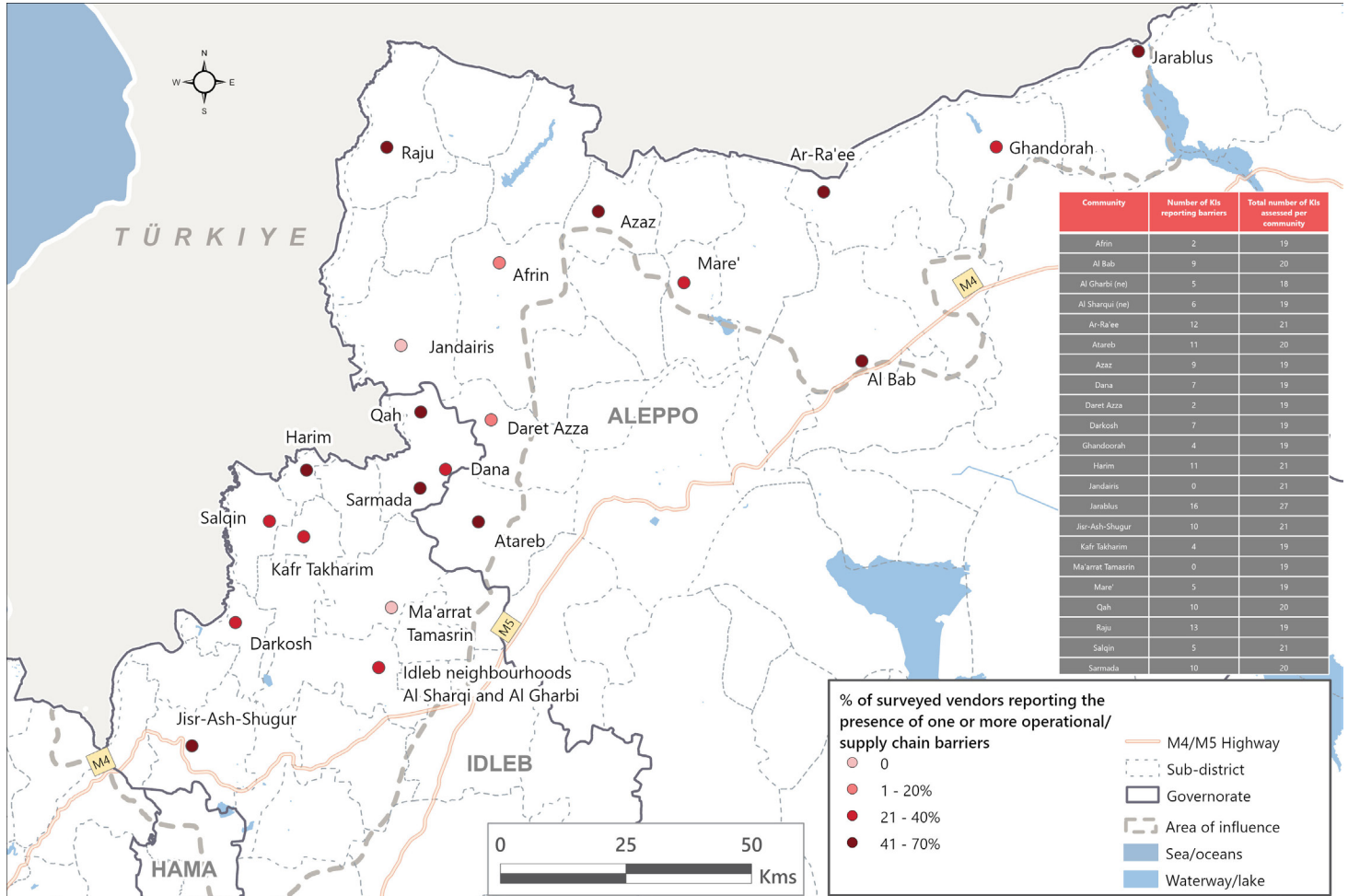
Further, the findings show that retailers and wholesalers were equally likely to report barriers generally as well as lack of funds specifically.

Nonetheless different signs suggest that retailers may be under considerable financial pressure. For example, most retailers reported being unable to fulfill requests for payment on credit by customers, likely linked to their own lack of cash and increased expenses in the context of the earthquakes. Furthermore, retailers were more likely than wholesalers to report a reduction in savings due to the earthquakes (8% difference).

Figure 17: Most commonly reported financial barriers to keeping the business running and well-stocked, as reported by vendors who reported lack of funds (n=99, 23% of KIs)*

	retailers (77 KIs)	wholesalers (22 KIs)
High prices at supplier	66%	77%
Savings reduced since the earthquakes	44%	32%
Reduced credit services at financial service providers	13%	9%
Lack of liquidity at financial service providers	6%	5%
Cannot afford transaction fee of financial service providers	1%	0%
Unsafety when traveling to/from financial service providers	4%	9%
Limited transportation options to financial service providers	0%	5%

Map 4: Barriers to keeping business operational and well-stocked, percentage of surveyed vendors reporting the presence of one or more barrier



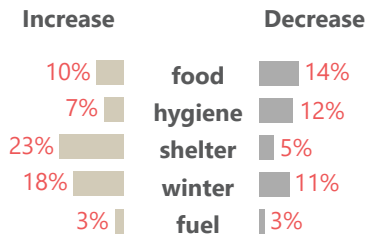
* KIs could select multiple responses and therefore values may sum to more than 100.

Supply chain resilience

78% of vendors reported no changes in the number of suppliers since the earthquakes, indicating that limited changes in the supply chain occurred. The most substantial changes in suppliers were reported by vendors of shelter and winter items, where the increase in suppliers is likely related to an increase in demand for these items.

Vendors overwhelmingly reported reliance on more than one supplier indicating overall supply chain resilience. Vendors selling basic food items most commonly reported they have a diversity of suppliers which is likely due to the fact that there is some level of local food production in NWS. Comparatively, winter and shelter item vendors more commonly rely on one supplier and are therefore more vulnerable to market shocks.

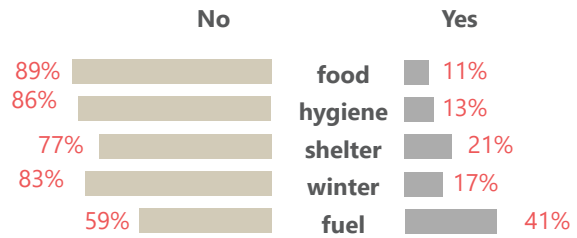
Figure 17: Change in number of suppliers since the earthquakes, as reported by vendor KIs¹



Stock levels

Number of days required to restock was between 2 and 5 days. Restocking was reportedly the fastest for basic food item vendors (2 days retailer, 4 days wholesaler) and longest for winter and shelter item vendors (4 days retailer, 5 days wholesaler). KIs generally reported stock levels up to 2 weeks and more, except for fuel (average 6 days).

Figure 18: Reliance on one supplier, as reported by vendor KIs



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).

Feedback on this product can be given anonymously using this [link](#).

ENDNOTES

PAGE 1

¹ Joint Rapid Assessment of Markets (JRAM), Northwest Syria, February 2023, <https://www.reachresourcecentre.info/>

² The Market Functionality Score (MFS) is a composite indicator that measure the functionality of a market through analysis of 5 components that determine a market's functionality: accessibility, availability, affordability, resilience and infrastructure. Indicators for each component will be integrated in the JMMI to allocate a MFS to assessed marketplaces.

PAGE 4

¹ The SMEB Total is the median cost of the minimum, culturally adjusted items required to support a 6-person household for a month.

PAGE 5

¹ Firstpost, 'Onion is the new gold: how a shortage is making the world cry', 21 February 2023, <https://www.firstpost.com/>

² Turkish Institute of Statistics (Turkstat), Agricultural Products Producer Price Index, March 2023, <https://data.tuik.gov.tr/>

³ Food and Agriculture Organisation of the United Nations (FAO), 'Syrian Arab Republic Post-earthquake rapid needs assessment on agricultural livelihoods and production in the northwest', April 2023, <https://fscluster.org/>

⁴ World Bank Group, Syria Earthquake 2023, Rapid Damage and Needs Assessment, March 2023

PAGE 6

¹ The presence of prejudices in the community that restrict access for certain groups of people.

² REACH, Humanitarian Situation Overview in Northwest Syria, March 2023 dataset, <https://www.reachresourcecentre.info/>

³ HSOS March data also showed that of the KIs from other communities that travel to JRAM assessed communities to purchase goods, all reported that the community members were able to access these markets. Here the KIs are not coming from JRAM communities, but from communities where the KI reported that community members visit a JRAM assessed marketplace. This supports consumer KI findings that damage to roads from the earthquakes was not preventing people travelling to markets (reported by 2% of consumer KIs).

⁴ Overall, of the female consumers reporting access barriers (n=209) 8% reported that they did not have anyone to look after children or older people while they go to the marketplace, compared to 2% (n=176) of male consumer KIs.

⁵ North Press Agency, 'Clashes between armed groups in Syria's Aleppo lead to casualties', April 4, 2023, <https://npasyria.com/en/95863/>

PAGE 7

¹ These findings are taken from a combination of quantitative and qualitative questions. Consumers reported on groups they perceive to have less market access since the earthquakes and these results are reported quantitatively. Consumers then responded to an open-ended question asking why they thought these groups had less access to markets.

PAGE 9

¹ The subset differ due to variants in what the vendors sell.

² REACH, Earthquake Response, Displacement Monitoring, 9 March 2023, <https://www.reachresourcecentre.info/>

PAGE 11

¹ Only markets covered in both rounds are included in this calculation.

PAGE 12

¹ The remainder reported no change in the number of suppliers since the earthquakes.