FACTSHEET

Joint Market Monitoring Initiative (JMMI)

October, 2023
Northeast Syria

KEY Findings*

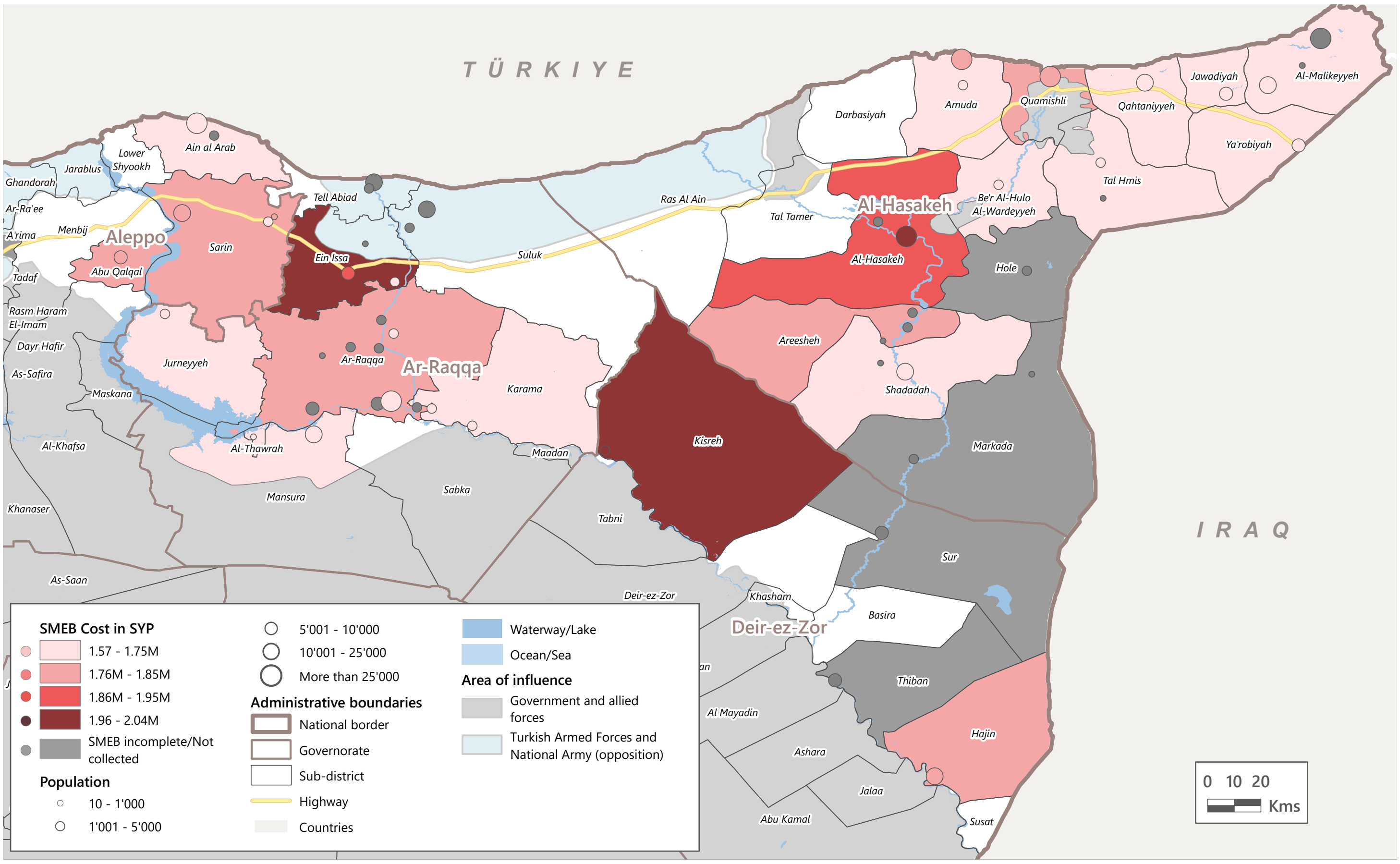
- The SYP-USD exchange rate increased by 4% from August 2023 to October 2023. This is following a 40% increase in the exchange rate from July 2023 to August 2023.
- The price of the SMEB total increased from 1,430,091 SYP in August to 1,776,174 SYP in October (+ 24%). Price increases were mostly driven by increases in the SMEB water component (+84%), bread (+125%), eggs (+60%) and vegetables (+57%).
- SMEB Water component increased by 82% - This was mostly driven by sharp increases to the price of water in Deir-Ez-Zor.
- General price increases were observed in Deir-Ez-Zor – prices of many food items, water, and fuel increased the most in Deir-Ez-Zor. This is likely related to security escalations that started in late August.

ASSESSMENT OVERVIEW

To inform humanitarian cash programming, the Northeast of Syria (NES) Cash Working Group (CWG), in partnership with local and international NGOs, conducts a monthly Joint Market Monitoring Initiative in Northern Syria. The exercise assesses the availability and prices of 36 basic commodities that are typically sold in markets and consumed by the average Syrian household, including food, water and non-food items e.g., fuel, and cell phone data. Of these, 18 items comprise the Survival Minimum Expenditure Basket (SMEB), which represents the minimum, culturally adjusted items required to support a 6-person household for a month.

*Since data was not collected in NES in September 2023, the changes refer to a 2-month change from August to October 2023.

Median SMEB price per sub-district, SYP



See Annex 1 for SMEB values as well as one and six month price trends per sub-district.

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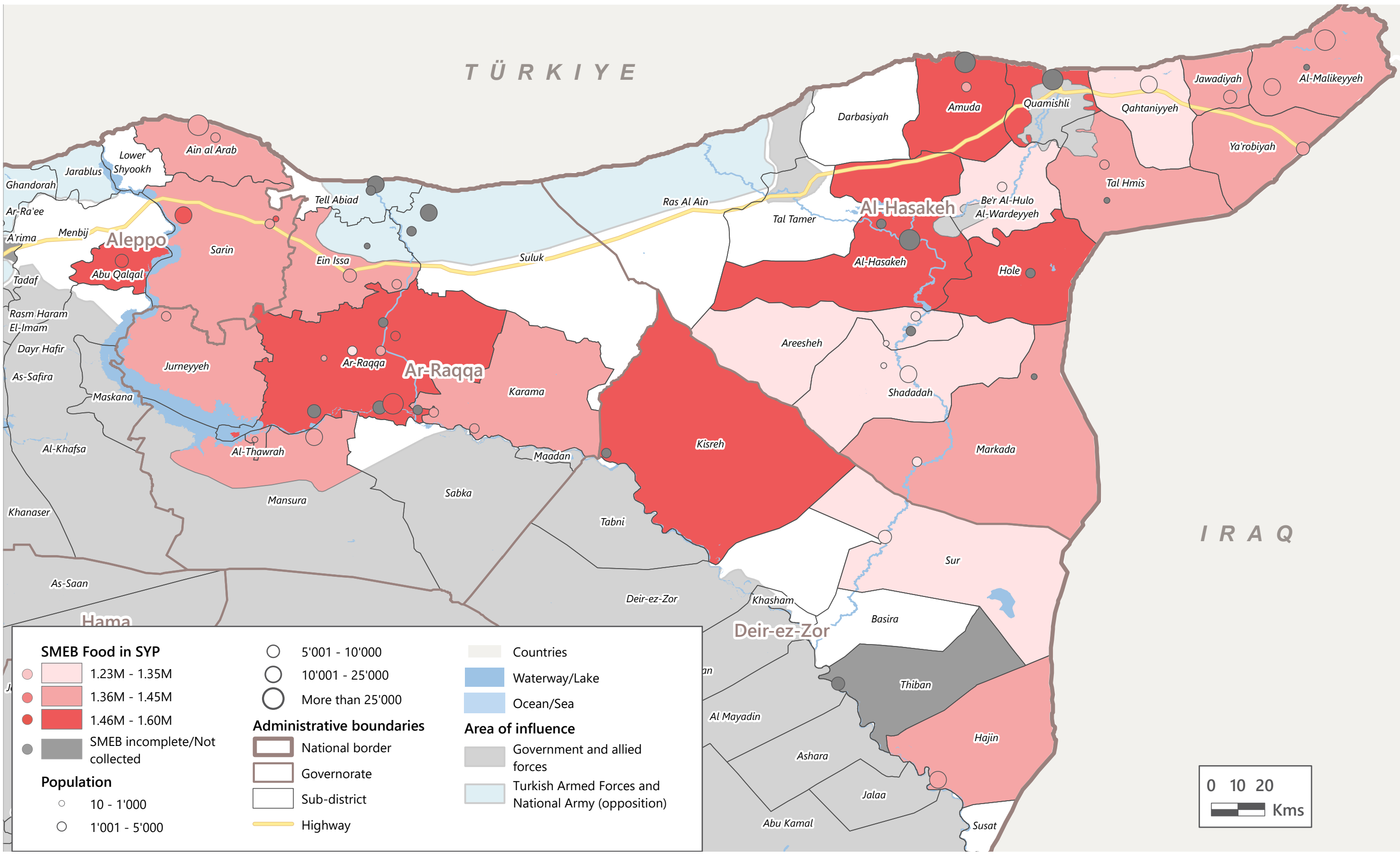
Cost of SMEB food component by sub-districts and communities



SMEB Contents

Food

Bread	37 kg
Bulgur	15 kg
Chicken	6 kg
Eggs	6 kg
Ghee (kg) / veg. oil (L)	7 kg/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 g
Sanitary pads	4 packs of 10

Other

Cooking fuel	25 L
Water trucking	4500 L
Phone data	1 GB
"Float"/other costs	7.5% of total

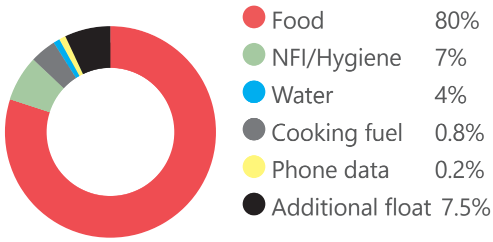
The SMEB Total is the median cost of the minimum, culturally adjusted items required to support a 6-person household for a month.

IN THIS FACTSHEET

As the JMMI generates a large amount of data, this factsheet is limited to a snapshot of key trends. Annex 1 and 2 show prices and percentage changes in SMEB values across assessed sub-districts as well as for individual monitored item prices.

For more detailed data, consult the dataset and online dashboard. The dashboard allows users to navigate more easily and draw geographical and temporal comparisons across currencies-

NES SMEB Composition*



October 2023 Data Collection

7	Supporting organisations
4	Governorates
11	Districts
26	Sub-districts
48	Communities
1,641	Shops (vendor KIs)

*Due to rounding figures may not total 100%

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NES SMEB TOTAL	NES SMEB FOOD ITEMS	NES EXCHANGE RATE
130 ▲ +21% 1,776,175 ▲ +24%	104 ▲ +19% 1,420,188 SYP▲ +24%	1 USD = 13,600 SYP ▲ +4%

General

The SMEB total price increased by 24% from August to October. This was a smaller rate of increase than from July to August (+26%). All governorates experienced price increases to the SMEB total (Figure 1). Notably, the price of the total SMEB increased the most in Deir-Ez-Zor (34%) and the price of the total SMEB is now most expensive in Deir-Ez-Zor. This is likely related to the security escalation in in Deir-Ez-Zor in late August and September 2023 which has caused disruptions to supply chains as well as local food, fuel and water production.[1]

All SMEB components, except phone data, underwent a price increase from August to October (Figure 2). The most considerable price increases were observed in the SMEB water component (+84%) and SMEB vegetables (+57%). In addition, bread (+125%), eggs (+60%), rice (+17%), and gas (+14%) underwent considerable price increases (see below).

Exchange Rate

Unlike previous months, the price increases of most monitored items appeared to exceed the increase in the SYP-USD exchange rate. The SYP-USD exchange rate only increased by 4% from August to October compared to an increase of 39% from July to August. It is important to note that the SYP-USD exchange rate varied considerably in the data collection period from 13,200 to 14,100 SYP per USD. The REACH field team confirmed that the exchange rate fluctuated substantially on certain days in October. Furthermore, the exchange rate varied across governorates (Table 1).

Table 1 - SYP-USD exchange rate at governorate level

Month	Aleppo	Al-	Ar-Raqqa	Deir-ez-Zor
August 2023	13,150	13,275	13,050	13,100
October 2023	13,450	13,762	13,500	13,550
% increase	2%	4%	3%	3%

Figure 1: SMEB prices, 2022-2023, SYP*

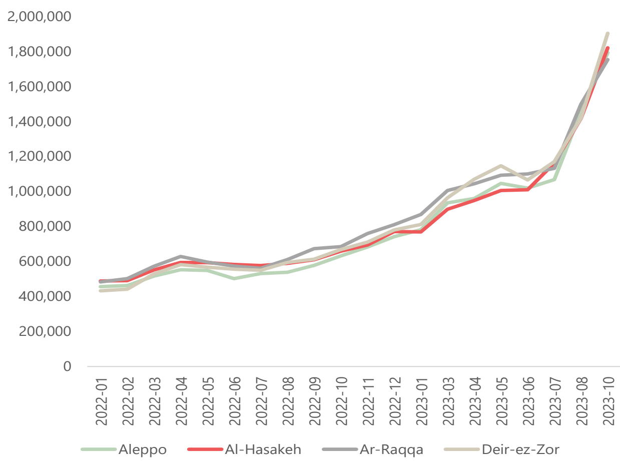


Figure 2: SMEB Components, 2022-2023, SYP*

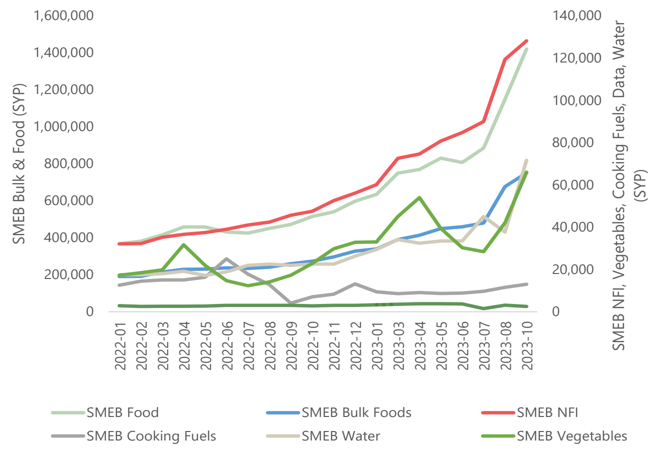
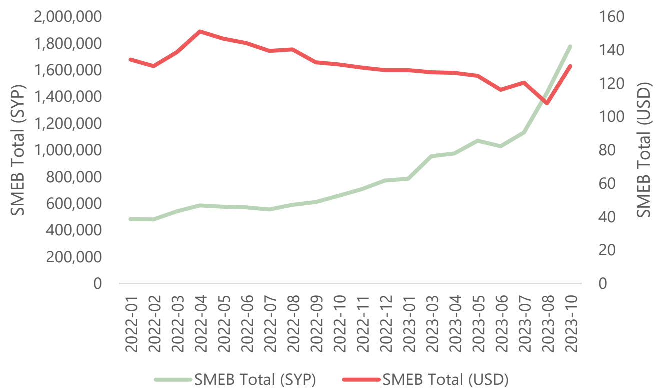


Figure 3: SYP-USD Exchange Rate, 2022-23, SYP*



*please note no data was collected in February 2023 and September 2023.

Bulk Foods

The price of SMEB bulk food component increased by 11% from August to October compared to a 40% increase from July to August. Of the core SMEB bulk food items, the price of rice increased the most (17%), followed by salt (12%), and tomato paste (10%) Bulk foods are typically imported and, thus, highly influenced by the exchange rate. As Figure 4 shows, the core bulk foods have followed the same trend as the SYP-USD exchange rate over the past 2 years. The considerably lower price increases in October compared to August may reflect a smaller rise in the exchange rate. Furthermore, the REACH field team noted that given a more successful harvest season in 2023 compared to previous years, prices of items such as bulgur have not increased much.

Deir-Ez-Zor experienced much higher price increases in rice (68%), tomatopaste (40%), red lentils (32%) compared to the other governorates. This may be related to the interruptions to supply chains caused by the security escalations in late August.[2]

Figure 4: Bulk Foods, 2022-23, SYP*

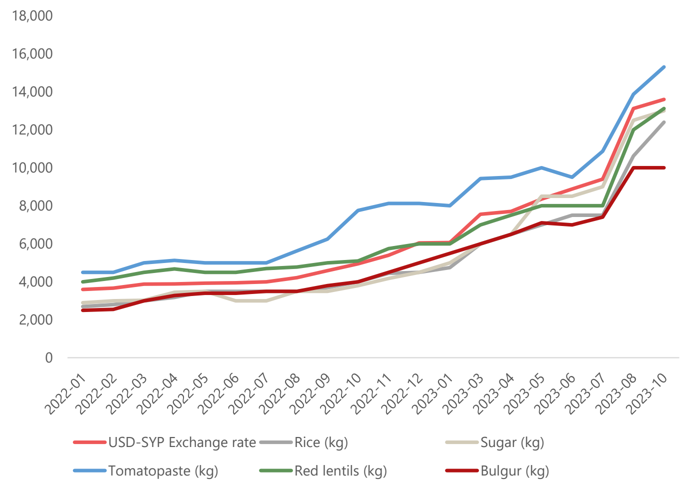
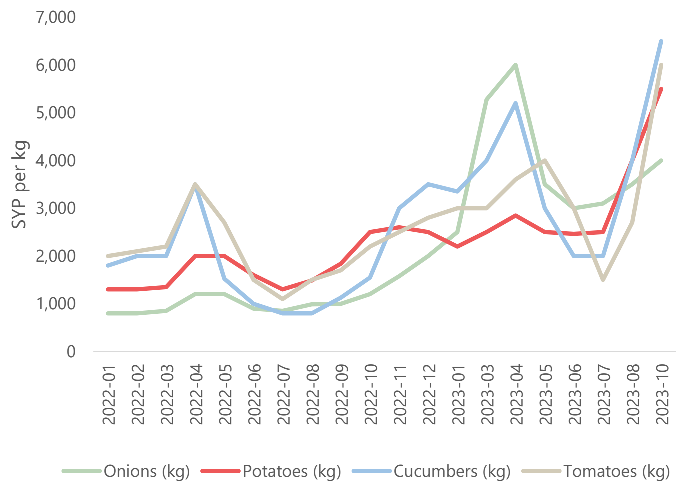


Figure 5: Vegetable prices, 2022-2023, SYP*



Bread

The price of bread increased by 125% regionally, with the sharpest increases seen in Deir-Ez-Zor (213%), Ar-Raqqa (186%), followed by Aleppo (125%) and Al-Hasakeh (100%). The price of bread in the JMMI combines the prices of subsidized and unsubsidized bread prices. Thus, the sharp price increases may reflect low availability of subsidized bread in October compared to August which would lead to a higher proportion of unsubsidized bread prices being included in the October bread price estimation. From the November JMMI, we have separated subsidized and unsubsidized bread prices in the data collection tool to better estimate the respective price changes of each type.

Vegetables

The price of SMEB vegetables increased by 57% from August to October compared to 48% from July to August. Particularly, the prices of tomatoes (131%) and cucumbers (63%) increased. In the past years, particularly cucumber and tomatoes have been experiencing price increases in August to November. The large price increases may also be influenced by the reportedly limited support for winter vegetable farming this year by the self-administration which is limited to fuel that is not sufficient to last the whole season.[3] The REACH field team also confirmed that the local supply of cucumbers and tomatoes was low in October (compared to onions and potatoes), leading households to rely on imported tomatoes and cucumbers that are more expensive.

Similar trends were observed across governorates, with slight variations in the increase of certain vegetables in specific areas. For example, the price of cucumbers increased by 75% in Aleppo, whilst they only increased by 47% in Raqqa. In contrast, the price of potatoes only increased 38% in Aleppo, whilst it increased by 57% in Al-Hasakeh. This may be related to different factors influencing local supply chains.

Poultry Products

The price of chicken increased by 27% on a regional level. Price increases were similar across Al-Hasakeh, Ar-Raqqa and Aleppo (approx. 25%), whilst the price of chicken increased by 48% in Deir-Ez-Zor. Historical JMMI data suggest that chicken prices decrease slightly in the summer months and increase again around October. The price of eggs increased by +60% regionally. Similar trends were seen across governorates. Historical JMMI data suggests that prices of eggs do increase in the fall and winter months. This may be related to how hens tend to slow down egg production in fall/winter as temperatures and hours of light decrease causing hormonal changes influencing egg production.[4]

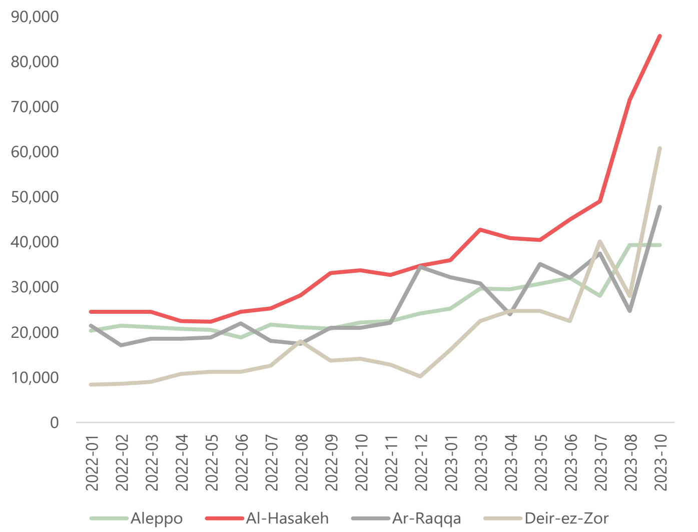
Trucked Water

The price of trucked water increased by 85% compared to a -13% decline in July to August. The price increase was mostly driven by price increases in Deir-Ez-Zor (117%) and Ar-Raqqa (70%). The price of trucked water only increased by 20% in Al-Hasakeh and did not change in Aleppo (0%). The price of trucked water, however, remains highest in Al-Hasakeh where the Alouk water station most recently was suspended on 23 June 2023. Furthermore, a recent spike in hostilities damaged critical civilian infrastructure including power stations and water facilities in Al-Hasakeh in September and October 2023.[5]

The sharp price increases in Deir-Ez-Zor are likely related to the late August 2023 security escalations that lead to roadblocks and curfews influencing supply entry into the governorate and, thus, prices of products.[6] Furthermore, direct attacks on fuel stations are likely to have influenced the price of fuel (see below) which is critical for the production of water. In addition, water treatment facilities have been attacked resulting an increased likelihood of exposure to lower quality water in Deir-Ez-Zor.

The high price increases in Deir-Ez-Zor and Ar-Raqqa in October are of concern as these are also the governorates in NES with the highest number of suspected cholera cases.[7]

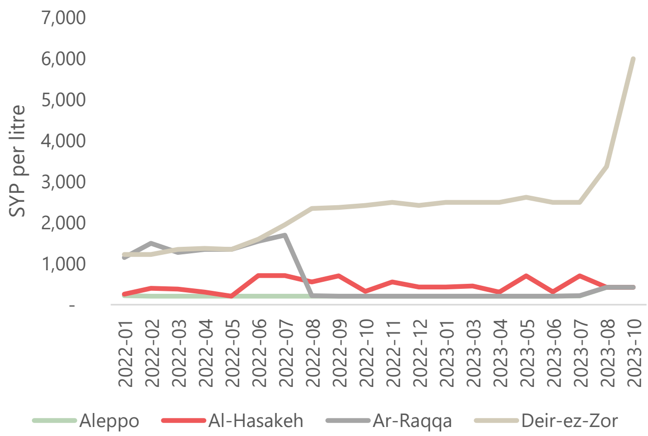
Figure 6: SMEB Water Trucking prices, 2022-23, SYP*



Manually Refined Petrol

The price of manually refined petrol increased by 78% in Deir-Ez-Zor from August to October. As Figure 7 shows, manually refined petrol was already more expensive in Deir-Ez-Zor compared to other governorates in August. The sharp price increase in Deir-Ez-Zor is likely related to attacks on fuel stations and disruptions to the supply chains following the August 2023 escalations.

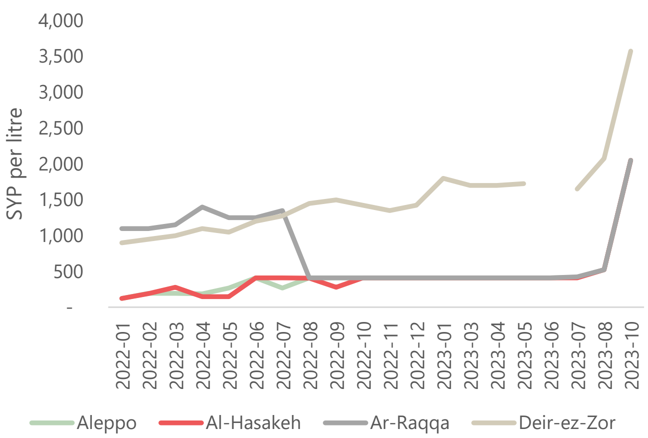
Figure 7: Manually Refined Petrol, 2022-2023, SYP*



Manually Refined Diesel

The price increased by 290% in Aleppo, Al-Hasakeh, and Ar-Raqqa, whilst only by 72% in Deir-Ez-Zor. However, manually refined diesel has historically been much higher in Deir-Ez-Zor than the other governorates and remains more expensive (Fig. 8).

Figure 8: Manually Refined Diesel, 2022-23, SYP*



* The dotted line represents the month of February when no data was collected due to the earthquake.

LIQUIDITY ISSUES

Availability of USD denominations remained a challenge across NES. Limited stock of at least 1 USD denomination has throughout the past months been close to 100% of surveyed vendors. Slightly fewer vendors reported limited 5 USD (49% compared to 61% in August), 10 USD (54% compared to 68%), 20 USD (67% compared to 77%), 50 USD (75% compared to 79%) and 100 USD (72% compared to 77%). Liquidity appeared to improve in Hasakeh, Aleppo, and Ar-Raqqa where fewer vendors reported limited stock of all denominations compared to August. In contrast, in Deir-Ez-Zor, more vendors reported liquidity challenges. More vendors reported limited stock of all denominations in Deir-Ez-Zor except 10 USD (50% compared to 58% in August).

The limited availability of USD denominations is of concern as it can impact Multipurpose Cash Assistance (MPCA) cash distributions as well as the ability of households to receive cash in remittances from abroad.

Number of informal exchange vendors reporting limited stock of USD notes

Al-Hasakeh (49 vendors)

Limited stock of 5 USD	36/49
Limited stock of 10 USD	39/49
Limited stock of 20 USD	37/49
Limited stock of 50 USD	34/49
Limited stock of 100 USD	20/49

Aleppo (20 vendors)

Limited stock of 5 USD	4/20
Limited stock of 10 USD	6/20
Limited stock of 20 USD	13/20
Limited stock of 50 USD	17/20
Limited stock of 100 USD	20/20

Ar-Raqqa (28 vendors)

Limited stock of 5 USD	7/28
Limited stock of 10 USD	8/28
Limited stock of 20 USD	15/28
Limited stock of 50 USD	21/28
Limited stock of 100 USD	27/28

Deir-Ez Zor (12 vendors)

Limited stock of 5 USD	6/12
Limited stock of 10 USD	6/12
Limited stock of 20 USD	8/12
Limited stock of 50 USD	10/12
Limited stock of 100 USD	12/12

* The dotted line represents the month of February when no data was collected due to the earthquake.

SUPPLY CHALLENGES

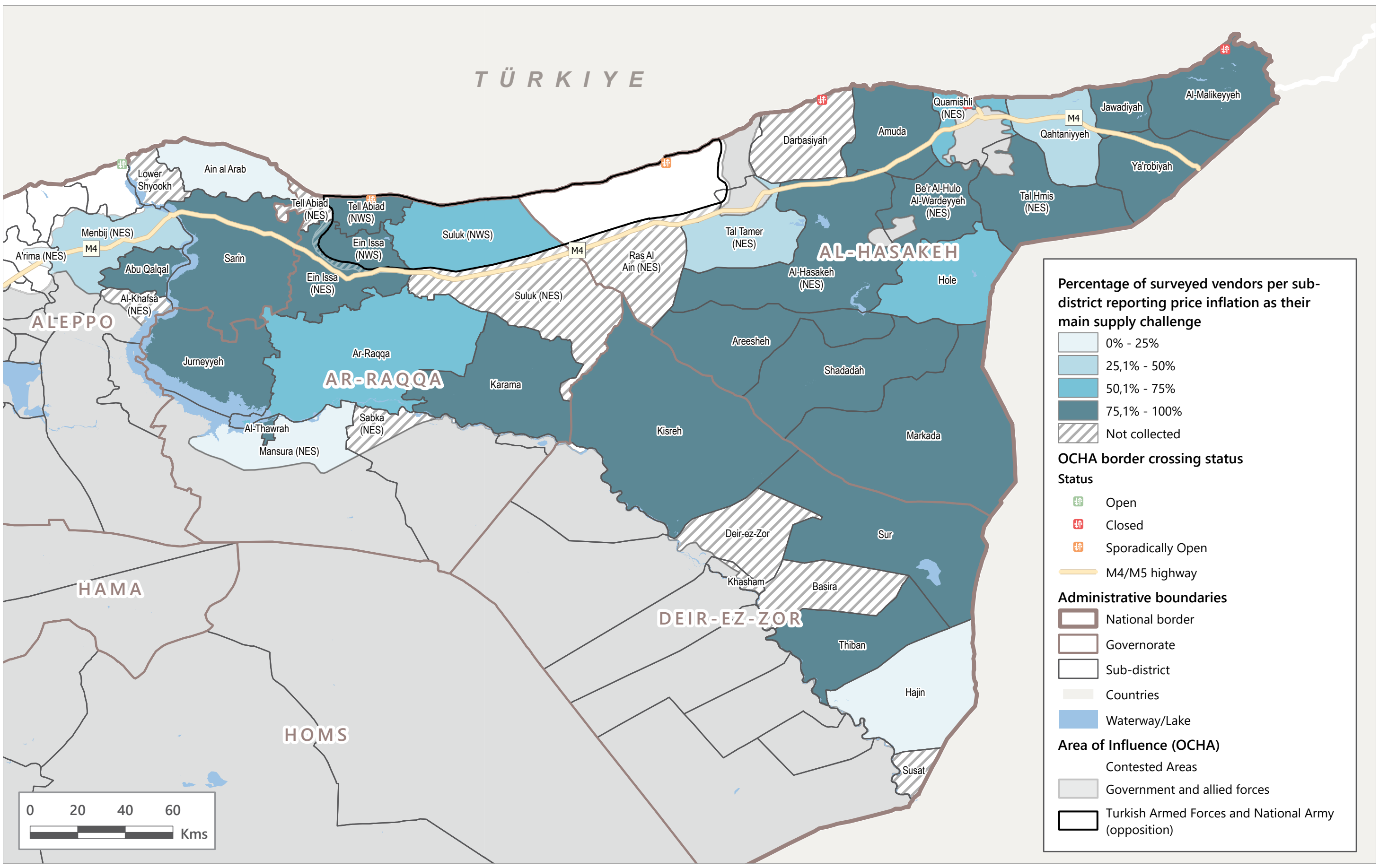
In October 2023, a slightly smaller proportion of vendors reported a least one challenge to their supply (81%) compared to August (85%). This is mostly explained by fewer vendors reporting price inflation as a in October (75%) compared to August (78%). The smaller proportion of vendors reporting of price inflation as a challenge may reflect the slightly slower rate of increase of the USD-SYP exchange rate (4%) between August and October compared to between July and August (39%).[8] Particularly, Deir-Ez-Zor and Al-Hasakeh reported supply challenges compared to other governorates.

A larger proportion of vendors in Deir-Ez-Zor reported supply challenges (86% compared to 78% in August). More vendors reported border closures were a challenge to supply (10% compared to 6%), price inflation (77% compared to 74%), supplier does not have authorisation for movement (16% compared to 12%), limited supply (47% compared to 29%), supplier cannot meet demand (26% compared to 22%). report challenges associated with the unfolding security situation. Whilst less vendors reported that insecure transport roads were a challenge to supply, more vendors report that supply cannot meet demand. This may reflect that supply routes into Deir-Ez-Zor have been compromised due to the security challenges. Since Deir-Ez-Zor is dependent on import of goods from other governorates for most goods, interruptions of supply chains due to the security situation is likely to quickly affect supply. [9]

Most commonly reported supply challenges (% of surveyed vendors)*

	AREA	REPORTED %
	NES	75%
PRICE INFLATION	Al-Hasakeh	85%
	Aleppo	47%
	Ar-Raqqa	75%
	Deir-ez-Zor	77%
	NES	17%
SUPPLIER LIMITED SUPPLY	Al-Hasakeh	19%
	Aleppo	9%
	Ar-Raqqa	10%
	Deir-ez-Zor	47%
	NES	15%
SUPPLY CANT MEET DEMAND	Al-Hasakeh	28%
	Aleppo	3%
	Ar-Raqqa	2%
	Deir-ez-Zor	26%
	NES	5%
BORDER CROSSINGS	Al-Hasakeh	8%
	Aleppo	0%
	Ar-Raqqa	1%
	Deir-ez-Zor	10%

Vendors reporting price inflation as their main supply challenge



* Multiple choice question and therefore percentages may not equal 100%. See the summary page of the dataset for percentages of all reported supply challenges per governorate.

METHODOLOGY OVERVIEW

In order to be included in the JMMI, markets must be permanent in nature, large enough to support at least two wholesalers, and diverse enough to provide a sufficient variety of goods and commodities. Additionally, the shops surveyed within each market must be housed in permanent structures and must sell certain items to be eligible for inclusion. Median prices at each higher administrative level of aggregation (district, governorate, region) are calculated by taking the medians from sub-district level prices. Community and sub-district level prices are both drawn from the median prices collected from vendors.

LIMITATIONS

All JMMI data is only indicative of the specific time frame within which it was collected, and trend lines in graphs may not be continuous where data is missing. Usually, data is collected during the first Monday-to-Monday of each month.

The JMMI data collection tool requires enumerators to record the cheapest available price for each item, but does not require a specific brand, as brand availability may vary. Therefore, price comparisons across regions may be based on slight variants of the same product. Non-food items (NFIs) are particularly challenging to standardise as they vary significantly in terms of types, brands, and specifications. The JMMI methodology aims to balance consistency and comparability considerations with geographical variations in availability.

Due to issues of access, security and partner capacity, the markets included in the JMMI may vary on a monthly basis. As such, the reported changes in the more aggregate levels (governorate, district) may be driven by shifts in coverage rather than actual changes. For this reason, we recommend all users to consider local markets and lower levels of aggregation (sub-district, community) when using JMMI data for more specific trend analyses.

JMMI AND THE CASH WORKING GROUP

The JMMI exists within the framework of the Cash Working Group (CWG). In Northeast Syria (NES), 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. In northeast Syria (NES), the CWG was established in 2018, to fulfil a similar purpose in that region.

For more information about the CWG in NES, please contact the cash working group coordinator at cashcoordnes@gmail.com

REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts.

The methodologies used by REACH include primary data collection and in-depth analysis. All activities are conducted through inter-agency aid coordination mechanisms.

For more information about REACH, please contact the REACH JMMI focal point, Cecilia Hoegfeldt, at cecilia.hoegfeldt@impact-initiatives.org or visit the REACH Syria Resource Centre.

PARTNERS

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.

Annex 1: Median SMEB price per sub-district

	SMEB Total (SYP)	1 month change	6 month change	12 month change	SMEB USD
Northeast Syria SMEB					
Aleppo	1,791,595	23%	87%	183%	130.30
Abu Qalqal	1,845,506	No Data	85%	188%	137.21
Ain al Arab	1,740,158	20%	83%	179%	129.81
Sarin	1,791,595	23%	85%	193%	130.30
Al-Hasakeh	1,820,346	28%	92%	176%	135.50
Al-Hasakeh	1,935,673	30%	104%	166%	143.92
Areesheh	1,825,147	64%	106%	204%	133.47
Quamishli	1,815,545	29%	92%	178%	137.54
Shadadah	1,684,696	23%	85%	No Data	121.64
Ar-Raqqa	1,752,892	17%	68%	156%	128.90
Ar-Raqqa	1,763,376	10%	62%	170%	128.71
Ein Issa	1,763,048	6%	69%	138%	129.64
Karama	1,703,355	27%	75%	149%	126.17
Mansura	1,742,736	25%	No Data	No Data	129.09
Deir-Ez-Zor	1,902,773	34%	78%	185%	140.39
Hajin	1,776,175	24%	75%	No Data	131.57
Kisreh	2,029,372	44%	80%	196%	149.22

* USD values are calculated as per the informal exchange rate recorded in the same geographical area.
** For these sub-districts, water trucking prices were not available and are not included in the SMEB price.

Annex 2: Price of SMEB items in NES

Item	Unit*	Price SYP**	1 month change	6 month change	Price USD**
NES SMEB food items		**1,420,188**	**1,147,792**	**768,275**	**104**
SMEB bulk food items	SMEB	750,100	11%	82%	55.15
Bulgur	1 kg	10,000	0%	54%	0.74
Red lentils	1 kg	13,125	9%	75%	0.97
Rice	1 kg	12,400	17%	91%	0.91
Salt	500 g	1,675	12%	68%	0.12
Sugar	1 kg	13,000	4%	100%	0.96
Tomato paste	1 kg	15,313	10%	61%	1.13
SMEB vegetables	SMEB	66,000	57%	22%	4.85
Tomatoes	1 kg	6,000	131%	67%	0.44
Potatoes	1 kg	5,500	38%	93%	0.40
Cucumbers	1 kg	4,000	14%	-33%	0.29
Onions	1 kg	6,500	63%	25%	0.48
SMEB cooking oils	SMEB	129,938	3%	61%	9.55
Ghee	1 kg	20,125	8%	75%	1.48
Vegetable oil	1 L	18,000	0%	53%	1.32
Non-veg perishables					
Bread	8 pc	1,000	125%	165%	0.07
Chicken	1 kg	26,750	27%	71%	1.97
Eggs	30 pc	44,000	60%	144%	3.24
SMEB non-food items	SMEB	84,705	7%	51%	9.42
Bathing soap	1 pc	5,000	11%	100%	0.37
Sanitary pads	10 pc	4,500	-5%	50%	0.33
Toothpaste	100 g	6,833	-3%	71%	0.50
Laundry powder	1 kg	12,750	6%	76%	0.94
Dish soap	1 L	11,306	8%	51%	0.83
SMEB cooking fuels	SMEB	13,000	8%	5%	0.96
Kerosene (manually refined)	1 L	2,500	0%	61%	0.18
LP gas	1 L	600	14%	45%	0.04
SMEB water trucking	SMEB	71,591	82%	49%	5.26
Water trucking (1000 L)	1 m3	15,909	82%	49%	1.17
Other					
Phone data	1 gb	2,500	-10%	24%	0.18

* The SMEB unit refers to the current SMEB allocation of the item, as outlined on page 2.
** USD values are calculated as per the informal exchange rate recorded in the same geographical area. Please see this month's JMMI dataset for informal exchange rates by area.

Endnotes

1 REACH (2023, September). Rapid needs assessment in response to the conflict escalation in Deir-ez-Zor governorate, September 2023.

2 OHCHR (2023, September). Türk warns civilians will again pay price as Syrian conflict fragments.

3 Enab Baladi (2023, November). Qamishli: Driven by fuel, increase in winter vegetables prices.

4 K-State Research and Extension (2022). Why Does Egg Production Lower in Winter?
World Food Programme. (2023, August 7). WFP Syria Market Price Watch Bulletin, June 2023 - Syrian Arab Republic | ReliefWeb.

5 UNSC (2023, October). As Regional Violence Spills over to Syria, Special Envoy, Briefing Security Council, Urges De-escalation, Refocus on Country's Political Process.

6 OHCHR (2023, September). Türk warns civilians will again pay price as Syrian conflict fragments.

7
WHO (October, 2023). Whole of Syria Cholera Outbreak Situation Report No. 20.

8 REACH (2023, September). Rapid needs assessment in response to the conflict escalation in Deir-ez-Zor governorate

ABOUT REACH