

Northern Syria Market Monitoring Exercise

November 2015

Cash-Based Responses
Technical Working Group

REACH Informing
more effective
humanitarian action

INTRODUCTION

To understand market functionality in northern Syria and how markets cope with challenges created by the conflict, the Cash-Based Responses Technical Working Group (CBR-TWG) and REACH conduct monthly monitoring of key markets. In each assessed market, field teams record the prices and stock levels of selected food and non-food items (NFIs) as well as of fuel sold by local traders and retailers. Commodities have been identified based on what is typically available, sold and used by an average Syrian household. Many are components of the Survival Minimum Expenditure Basket (SMEB), detailed in the table to the right, which outlines the minimum culturally-adjusted group of items required for survival for a six-person household over a one-month period.

This report provides an overview of price ranges and medians for key foods, NFIs and types of fuel across the areas assessed, as well as of water trucking expenses and currency exchange rates. In order to illustrate variation in prices and availability, REACH has used the collected data to map the price of an SMEB in each subdistrict. The cleaned data sets are available on the REACH Resource Centre and are distributed to CBR-TWG partners, as well as to the clusters.

WHAT IS THE CASH-BASED RESPONSES TECHNICAL WORKING GROUP?

The Cash-Based Responses Technical Working Group (CBR-TWG) was established in March 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.

METHODOLOGY

Between 16 and 22 November 2015, a network of enumerators affiliated with CBR-TWG members collected detailed information about the availability and prices of key food items, non-food items and fuel in northern Syria. Eight partners (CARE/Shafak, Concern, GOAL, IRC, Mercy Corps, People in Need, REACH and Solidarités International) contributed data from 30 subdistricts across Idlib, Lattakia, Aleppo, ar-Raqqa, Deir ez-Zor and al-Hasakeh governorates.

Enumerators were trained on methodology and tools by the REACH assessment team and CBR-TWG members. Each enumerator assessed three to five shops in the main market in their assigned subdistrict, using surveys to collect information about prices, inventory, and the time needed to replace current stocks. In areas where direct surveying by enumerators is not possible, such as the cities of Lattakia and Deir-ez-Zor, data collection is conducted through key informants, who are typically shop owners, suppliers or consumers.

Eleven survey forms were deployed on KoBo to capture price and stock information from different types of establishments, including grocery stores,

CHALLENGES AND LIMITATIONS

CBR-TWG partners closely monitor the security context in the subdistricts where they have committed to collect data and are encouraged not to expose their enumerators to undue risk. In some subdistricts, this means that enumerators cannot collect data from certain communities or neighbourhoods. This was the case in the divided cities of Aleppo, Deir-ez-Zor, and al-Hasakeh, where government-held areas could not be surveyed. In addition, in November 2015, two partners scaled back their coverage and three suspended their participation altogether due to security concerns.

fuel traders, currency exchange shops and water trucking services, among others. In most cases, enumerators used the KoBoCollect Android app to upload data. November marked the first time that data on winter NFIs was collected (see the Winterisation Annex for analysis).

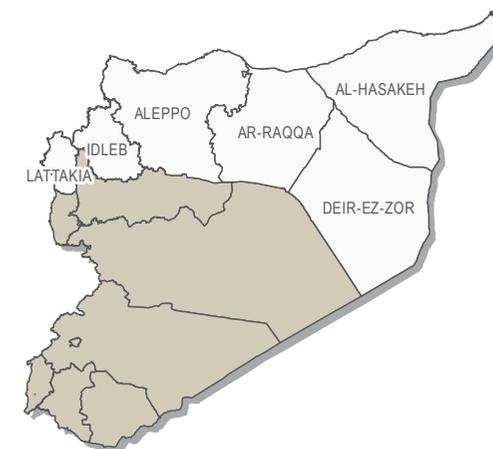
In order to be included in the Market Monitoring Exercise, markets had to be permanent in nature, large enough to support at least two wholesalers, and diverse enough to provide a sufficient variety of goods and commodities. The shops surveyed within each market had to be housed in permanent structures and had to sell certain goods and commodities to be eligible for inclusion.

Following data collection, the REACH assessment team compiled and cleaned all partners' data, normalising prices, cross-checking outliers and triangulating the results. The cleaned data was then analysed by commodity and by subdistrict. Prices were divided into quartiles and boxplots were created to help CBR-TWG members understand the distribution of prices. In addition, the average cost of an SMEB in each subdistrict was calculated and mapped by the REACH GIS team.

For methodological reasons, restocking data from al-Hasakeh governorate could not be analysed alongside data from other governorates.

Coordinating a cross-border price monitoring exercise via remote management is inherently challenging, as issues of enumerator training, consistent communication and verification of results are harder to resolve from afar. CBR-TWG members have sought to overcome these issues by aligning their efforts, using a single set of online survey forms, uploading all data to a central server, and harmonising procedures to ensure that the data uploaded are as accurate as possible.

ASSESSED GOVERNORATES



SURVIVAL MINIMUM EXPENDITURE BASKET (SMEB) CONTENTS

	Item	Quantity
Food Items	Bread	37 kg
	Bulgur	15 kg
	Chicken	4 kg
	Eggs	6 kg
	Fresh vegetables	6 kg
	Ghee	7 kg
	Rice	19 kg
	Salt	1 kg
	Sugar	5 kg
	Tomato paste	6 kg
Non-Food Items	Individual soap	12 pcs
	Laundry/dish soap	2 kg
	Sanitary pads	4 packs of 10
	Toothpaste	2 pcs
Fuel	Kerosene	25 L
	(manually refined)	
Water	Water	2790 L
Other	6% float*	6% total value

* 6% float was excluded from SMEB calculations due to the commonality of incomplete baskets.

NOVEMBER 2015: NORTHERN SYRIA CONTEXT

Challenges that affected data collection during the October Market Monitoring Exercise persisted or intensified throughout November. As a result, the levels of coverage obtained during previous months' exercises were reduced, and plans to assess markets in additional subdistricts had to be postponed. A sharp increase in conflict activity in northern Hama and southern Idlib in October continued to affect access to a number of locations where data collection was planned. Furthermore, it was not possible to assess markets in Kafr Zeita and Madiq Castle in Hama and Khan Shaykun in Idlib because they were no longer active.

While markets in Zurbah and Hadher in Aleppo, in Hama, Kansaba in Lattakia, Kafr Nobol in Idlib, and Ras al-Ain in al-Hasakeh were assessed in October, it was not possible to do the same in November. At the same time, it was possible to resume coverage in Haritan in Aleppo and Maaret Tamsrin in Idlib. Ar-Raqqa subdistrict was also assessed for the first time.

In subdistricts where coverage was possible, escalating conflict in nearby or adjoining subdistricts did not appear to have significant adverse effects on prices. When adjusted for inflation, data on the prices and the availability of goods remained relatively consistent with recorded information in previous months.

COMMODITY PRICE CHANGES

The median US dollar sell rate across the areas assessed in November was 377 SYP/USD, with exchange shops' individual rates ranging from 374 to 385 SYP/USD. This rate represents a significant increase since October, when the median sell rate was 339 SYP/USD. The Turkish lira sell rate rose as well from 110 SYP/TRY in October to a median of 132 SYP/TRY in November, with collected rates ranging from 129 to 135 SYP/TRY.

MAIN PRICE CHANGES

**EGGS, TEA, TOMATO PASTE,
SOAP, GOVERNMENT PETROL**

With the inclusion of ar-Raqqa, November's Market Monitoring Exercise saw data collection extended for the first time to a city and subdistrict fully controlled by the Islamic State of Iraq and the Levant (ISIL). With an SMEB value of 34,968 SYP (92.75 USD), the median prices for individual goods and commodities were in most cases only slightly higher than those found in other subdistricts. While previous rounds of data collection have included ISIL-held neighbourhoods of Deir-ez-Zor, because that city is an active conflict zone, it was not possible to deduce whether dynamics there were emblematic of broader trends throughout ISIL areas of control. Data collected from Deir-ez-Zor has, for example, consistently resulted in monthly SMEB values markedly higher than those calculated in other subdistricts. Price and availability data collected from this round in ar-Raqqa suggest that market dynamics there may be similar to those found across other subdistricts throughout northern Syria, regardless of controlling party.

To provide a more complete indication of the SMEB in each subdistrict, additional questions about the prices and availability of three types of fresh vegetables—cucumbers, tomatoes, and onions—were added to this month's forms for the first time. Their prices tended to be relatively consistent within subdistricts. The reported prices for cucumbers ranged from 135 and 275 SYP/kilogram, with a median price of 175 SYP; tomatoes ranged from 150 to 280 SYP/kilogram, with a median price of 200 SYP; and onions varied from a low

MAIN SHORTAGES

**KEROSENE,
GOVERNMENT DIESEL**

of 35 to a high of 200 SYP/kilogram, with a median price of 75 SYP.

In spite of the Syrian pound's falling value, prices for many commodities did not rise dramatically, and in some cases, the cost of individual commodities fell in US dollar terms. The median price of tea, which was 1850 SYP in October, rose to 2000 SYP; the median price of eggs rose from 650 SYP to 750 SYP; tomato paste rose from 362 to 450 SYP; red lentils rose from 300 SYP to 350 SYP; and vegetable oil rose from 350 to 400 SYP. More marginal price increases (50 SYP or less) were noted for ghee, rice, bulgur, flour and potatoes. The median price of chicken and salt in SYP remained the same. When converted to US dollars, however, prices for some items fell in comparison with October. Median price increases in Syrian pounds for tea, chicken, ghee, bulgur and salt did not keep pace with inflation and fell in US dollar terms.

Similar to food items, prices for NFIs, fuel and water remained largely stable or fell in US dollar terms. Noteworthy increases in median prices were observed only for laundry soap (by 90 SYP) and individual soap (by 82 SYP). Meanwhile, the median prices for government petrol and government diesel decreased by 50 SYP and 100 SYP, respectively. Marginal median price increases (25 SYP or less) were noted for gasoline, manually refined petrol, manually refined diesel and kerosene. With the exception of manually refined diesel, these represent consistent or falling costs in USD. The

median price to deliver 1 litre of drinking water was 0.34 SYP, with figures ranging from 0.12 SYP in Atareb in Aleppo to 1.09 SYP in Deir-ez-Zor city.

ISSUES OF AVAILABILITY

Approximately two-thirds of subdistricts reported prices for all of the goods and commodities included in the survey. Data collected suggested shortages of bulgur in Harim subdistrict in Idlib, as well as bread in Derbasyah subdistrict in al-Hasakeh, although flour was available there.

Meanwhile, kerosene was unavailable or unreported in five subdistricts: Lower Shyookh and Ain al-Arab in Aleppo, Lattakia city, Tell Abyad in ar-Raqqa and Derbasyah in Al-Hasakeh. Limited availability may be demand-driven, however, with stores in some areas, notably Lattakia, not stocking the fuel because it is reportedly no longer widely used. Localised shortages of sanitary pads were also observed, though these generally had little effect on the value of the SMEB in affected subdistricts.

RESTOCKING TIME

Apart from the localised shortages highlighted above, supply chains throughout the assessed areas appeared to be functioning, with individual markets retaining adequate stock of most available items and reporting median restock times of one day for all commodities.

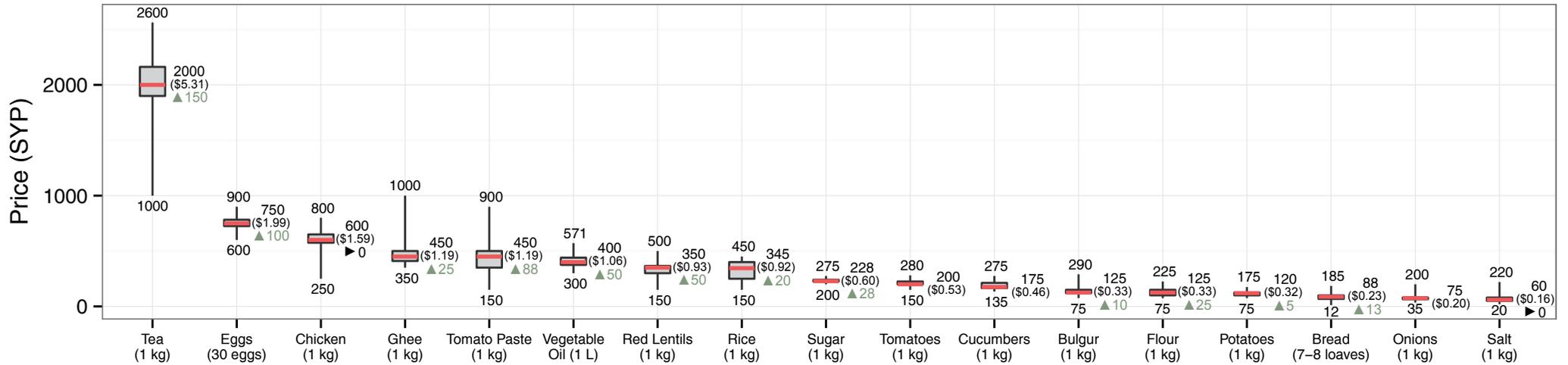
Supply chain problems were largely local. Delays of four to seven days were also frequently reported in subdistricts in northern Aleppo and ar-Raqqa adjacent to the Turkish border, particularly in Lower Shyookh, Ain al Arab and Tell Abyad.

Delays were markedly more frequent in ar-Raqqa, where median restock items of 5-10 days were reported for most non-produce items, including for items that generally take one day to restock in other subdistricts.

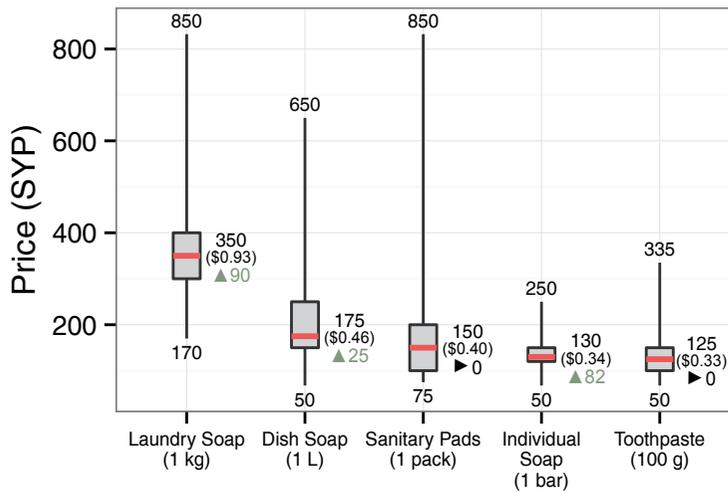
MEDIAN EXCHANGE RATES NOVEMBER 2015

377 SYP/USD
132 SYP/TRY

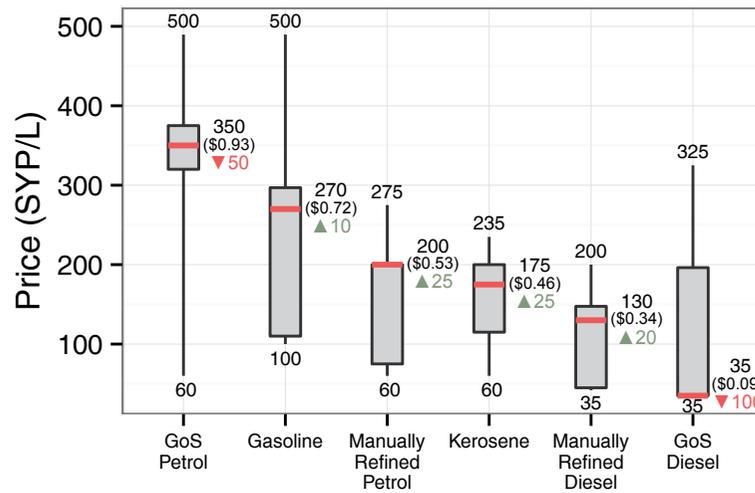
FOOD ITEMS



NON-FOOD ITEMS

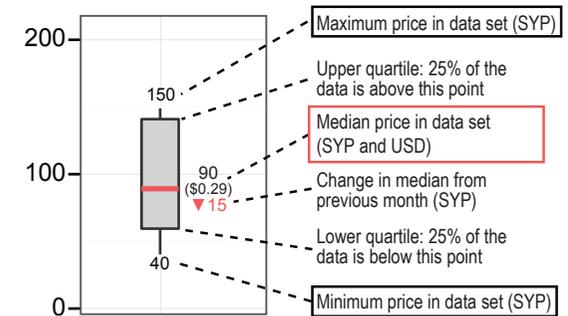


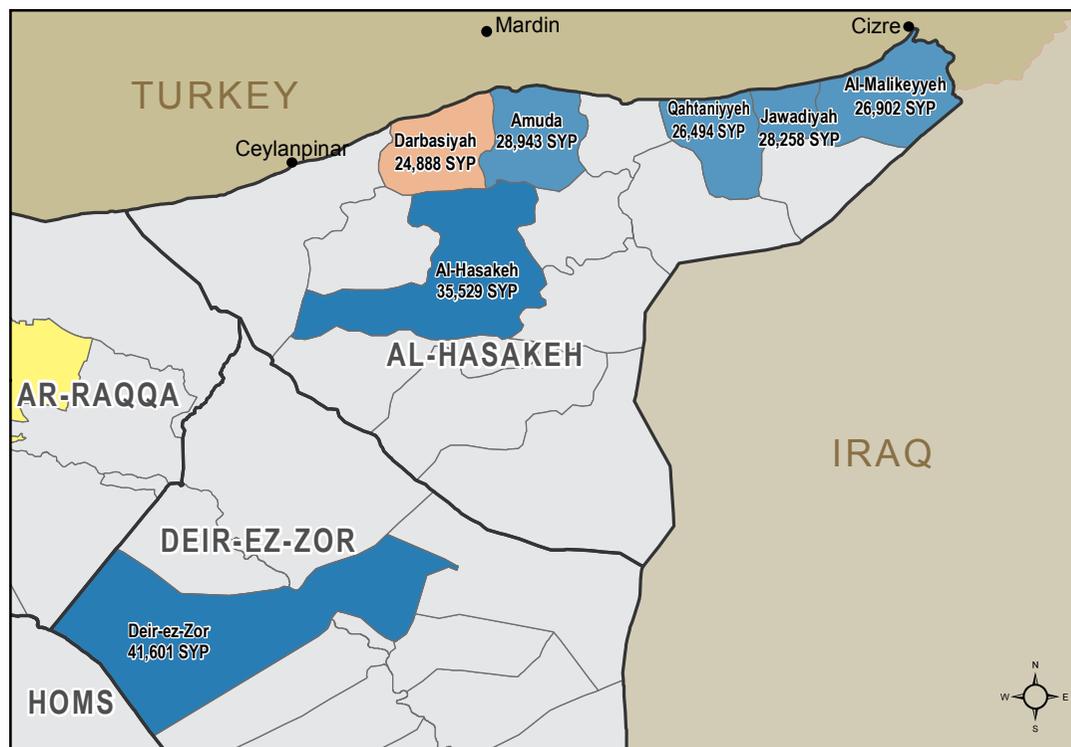
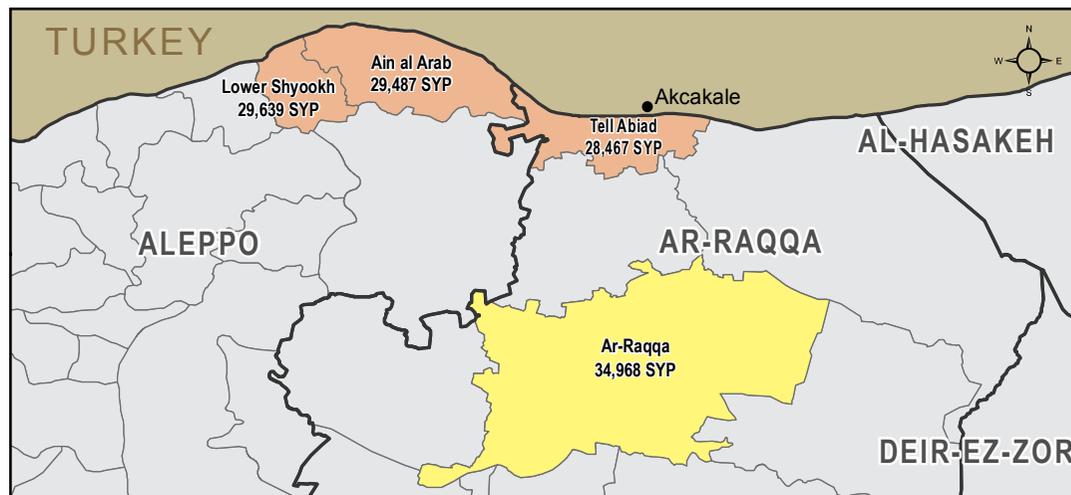
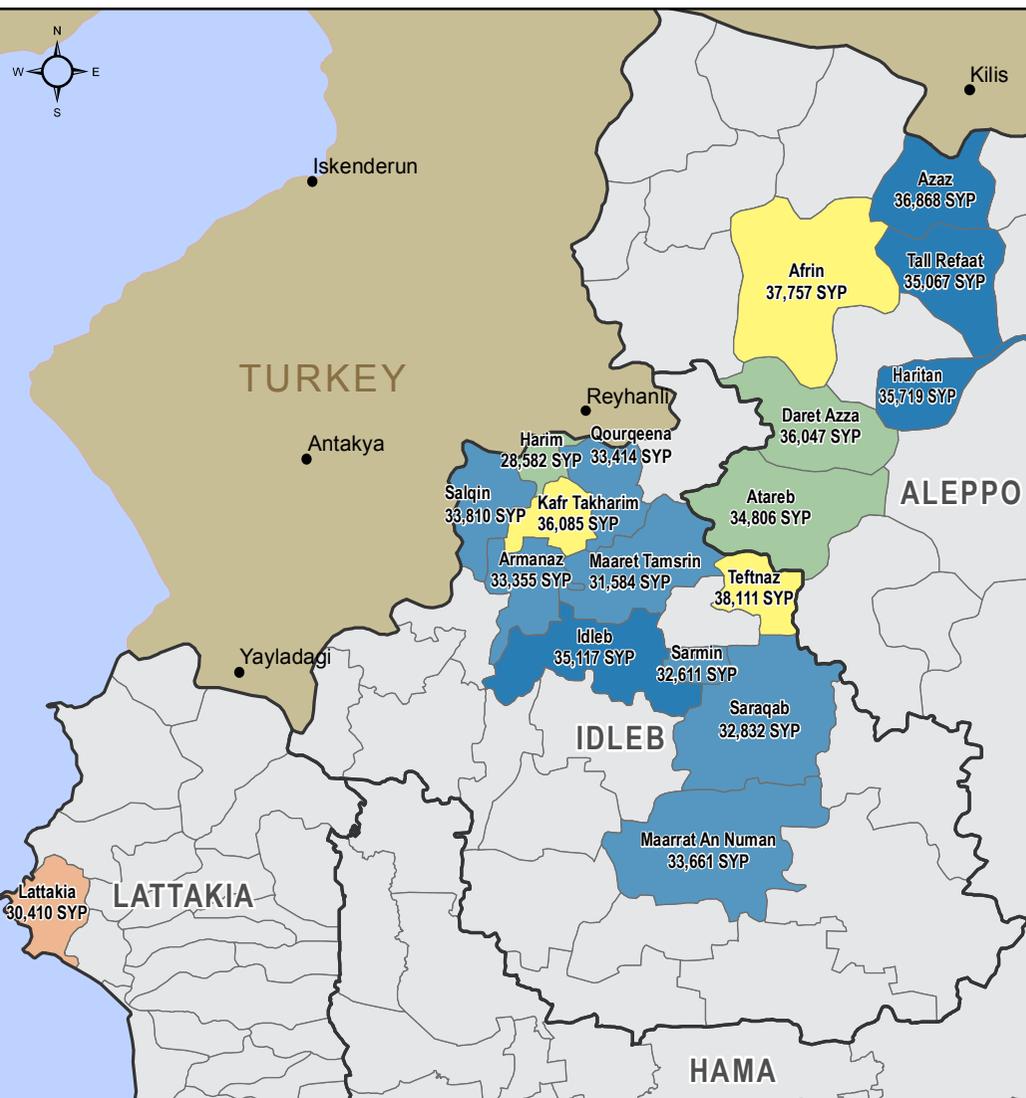
FUEL



How to read a box plot

Box plots provide a variety of data to aid in understanding the distribution of the data set. Prices are in SYP unless otherwise marked.





SURVIVAL MINIMUM EXPENDITURE BASKET			
ITEM	QUANTITY	ITEM	QUANTITY
Bread	37 kg	Laundry/dish soap	2 kg
Rice	19 kg	Individual soap	12 pcs
Bulgur	15 kg	Toothpaste	2 pcs
Ghee	7 kg	Sanitary pads	4 packs of 10
Sugar	5 kg	Dried pulses*	19 kg
Tomato paste	6 kg	Fresh vegetables	6 kg
Chicken	4 kg	Kerosene (manually refined)	25 L
Eggs	6 kg	Water	2790 L
Salt	1 kg	6% float*	6% total value

* not included in SMEB calculations

- Complete SMEB High Cost
- Complete SMEB Low Cost
- SMEB Excluding Kerosene or Kaz
- SMEB Excluding Water
- SMEB Excluding Other Items
- Subdistricts Not Surveyed

Data sources:
Boundaries - OCHA COD
Market monitoring data - REACH, CBR-TWG
Coordinate System: GCS WGS 1984
File: REACH_SYR_SMEB_Nov2015_A4_V1
Contact: reach.mapping@impact-initiatives.org

Note: Data, designations and boundaries contained on this map are not warranted to be error-free and do not imply acceptance by the REACH partners, associates or donors mentioned on this map.

Northern Syria Market Monitoring Exercise

Winterisation Supplement – November 2015

Cash-Based Responses
Technical Working Group

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WINTER ITEMS

In November 2015, for the first time, CBR–TWG partners' field teams were asked to collect information on a basket of eight winter-related NFIs: men's sweatshirts, men's winter jackets, men's trousers, men's winter boots, adult winter hats, mattresses, blankets and battery-powered torches/flashlights. This data collection exercise was designed as a pilot and baseline for future efforts to monitor a wider range of NFIs. In future rounds, the list may be expanded or amended to include other items.

The methodology for collecting data on winter NFIs was nearly identical to that used for the larger Market Monitoring Exercise. Before beginning data collection, enumerators were provided with specifications for each of the new winter items

outlining requirements related to size/dimension, weight and other qualitative factors. These specifications are described in the table at bottom right. As usual, enumerators were instructed to record the price of the least expensive item that met the specifications.

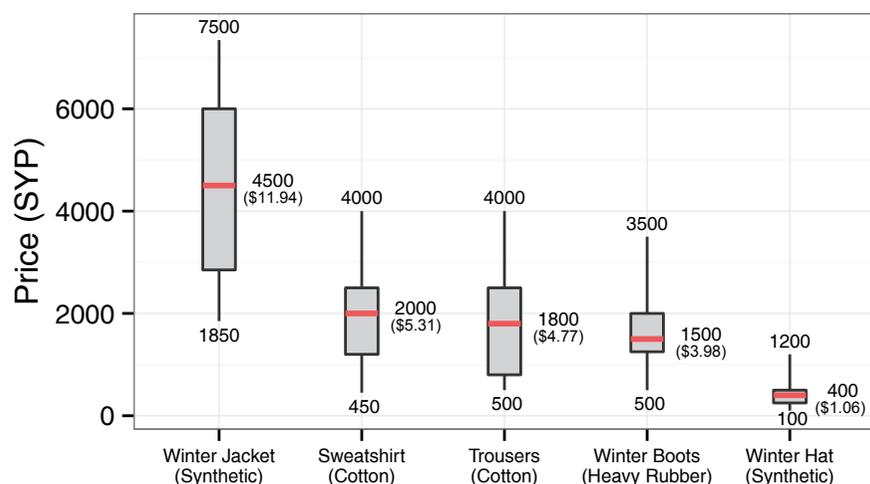
A variety of winter clothing items were available in most markets. Household items were also available in most subdistricts, with some exceptions, but were more difficult to obtain and sometimes required extensive searching. Enumerators reported that mattresses were the most difficult item to find but were usually available from at least one store or supplier. As with most of the monitored winter commodities, however, the selection was often sparse, and the least expensive items available varied widely in price and quality.

The prices of individual winter commodities could vary by a factor of ten or more, depending on the market and shop visited. For example, the median price for a mattress was 5,000 SYP, but reported prices ranged from 1,500 to 20,000 SYP, depending on location, vendor and type of mattress. Similar variations were observed with most clothing items. In general, prices appeared to vary by subdistrict; in certain areas, higher prices were apparent across a range of goods, rather than for individual items. Differences in the quality and brands of reported items may be responsible for these variations as well.

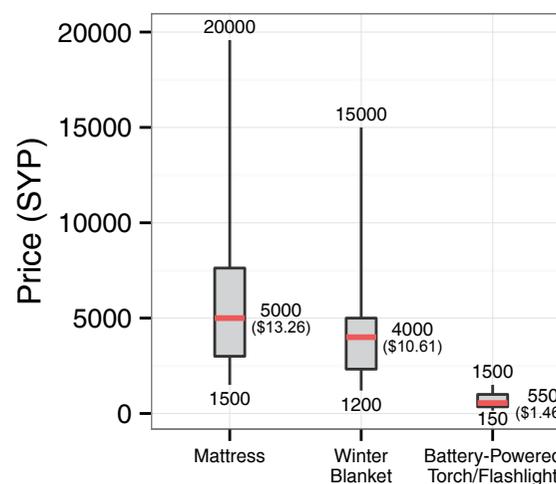
Restocking times for most winter NFIs were similar to food and other NFIs, with variations again apparent by subdistrict. Accordingly, subdistricts that reported longer restocking times for food and

NFIs tended to be the same ones that reported difficulties stocking winter items. More specifically, in November, subdistricts in northern Aleppo and ar-Raqqa adjacent to the Turkish border (Lower Shyookh, Ain al Arab, and Tell Abiad), as well as ar-Raqqa city, reported the longest restocking times.

WINTER CLOTHING



HOUSEHOLD ITEMS



MONITORED WINTER ITEMS

	Item	Specifications
Clothing	Sweatshirt	Men's size medium
	Winter jacket	Thick cotton/wool Men's size medium
	Trousers	Synthetic material Men's size medium
	Winter hat	Thick cotton Adult size
	Winter boots	Wool or knit fabric Men's size 42-46
Household Accessories	Winter blanket	150 x 200 cm Minimum thickness of 5 mm
	Mattress	Double size (140 x 200 cm)
	Torch/flashlight	Battery-powered