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SSN

THE SOCIAL SAFETY NET
Programme



Quarterly Price Monitoring Bulletin

2025 - Second Quarter



KIZILAYKART
Cash Based Assistance
Programmes



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OVERVIEW

The Social Safety Net (SSN) Programme, launched in August 2023, aims to help vulnerable individuals living in Türkiye under temporary or international protection to meet their basic needs. Funded by the Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR), the SSN Programme is implemented by Ministry of Family and Social Services (MoFSS) in partnership with Türk Kızılay and supported by the Presidency of Migration Management (PMM) and the Directorate-General for Population and Citizenship Affairs (DGPC). The SSN Programme brings together two major humanitarian assistance projects implemented in Türkiye: The Emergency Social Safety Net (ESSN), launched in 2016, and the Complementary Emergency Social Safety Net (C-ESSN), launched in 2021. Together, they form the SSN Programme, the world’s largest cash-based humanitarian assistance programme, designed to support the basic needs, such as food and shelter, of vulnerable households with dignity.



The objective of this bulletin is to provide an overview of the approach used to determine the reference costs for food and non-food baskets, with the aim of informing programmes under the Essential Needs Analysis (ENA) and Minimum Expenditure Basket (MEB).

The minimum expenditure thresholds established under the SSN Programme aim to improve the efficiency of support mechanisms for vulnerable groups by ensuring alignment with the humanitarian standards. In Türkiye, the Minimum Expenditure Basket (MEB) of the SSN Programme follows Sphere Standards¹ which consists of six categories: food, shelter, education, health and protection². While the food basket covers basic nutrition and calorie needs, standardized non-food items include hygiene, water, rent, energy, and healthcare. Although the same methodology is used for both ESSN and C-ESSN households, the MEB is adjusted based on average household size which is around 6 persons for ESSN households and 4 persons for C-ESSN households.

MEB calculation relies on multiple complementary data sources to ensure accuracy and representativeness. Market assessment studies provide insights into beneficiaries’ consumption habits, price levels, and market trends, while data from TurkStat³ present up-to-date inflation rates and prices for item groups. Additionally, prices from online markets are collected through web scraping and averaged to reflect items of moderate quality. Regular updates are essential to maintain the accuracy and relevance of the MEB, which is updated monthly based on the item group price index published by TurkStat.

1 Sphere Standards Handbook
 2 The protection component covers transportation and communication.
 3 TurkStat, “Consumer Price Index – May 2025,” Turkish Statistical Institute, TurkStat

ECONOMIC SNAPSHOT

This bulletin focuses on the market prices of the period between March 2025 – May 2025. The consumer price index (CPI) continues to rise in the second quarter of 2025 due to volatile movements.

The general CPI data released by the Turkish Statistical Institute (TurkStat) indicates that the second quarter followed a volatile trend. In March 2025, the monthly inflation rate increased by 2.46%, with food and housing categories contributing most significantly to this rise. In April 2025, monthly inflation accelerated to 3%, while annual inflation eased slightly to 37.86%. In May 2025, monthly inflation moderated to 1.53%, and annual inflation declined further to 35.41%, indicating a continued downward trend on a yearly basis. Overall, the second quarter recorded an approximately 8.3% increase compared to the first quarter.

Despite the monthly increases mentioned above, the annual inflation rate continued its trend due to the base effect (the high rates from the previous year dropping out of the calculation). The annual CPI fell from 38.1% in March 2025 and further down to 35.4% in May 2025. By the close of the quarter, the exchange rate of the local currency in the parallel market continued to rise, averaging 38.67 TRY. During the preceding twelve-month period, the Turkish lira suffered a depreciation of almost 20% in the foreign exchange market, and over a two-year period, it exhibited a decline of 87%.



Price Movements in Key Spending Groups

Examination of sub-expenditure groups in the second quarter, price increases were particularly concentrated in service and shelter related items. The education group reached an annual rate of 80.42% in March 2025 and, despite falling to 71.67% as of May 2025. The shelter sector, including rent, also continued to contribute significantly to inflation; the annual increase rate, which was 68.63% in March 2025, rose to 74.07% in April 2025 and standing at 67.43% in May 2025. On the other hand, the clothing group stood out on a monthly basis at the end of the second quarter, recording the highest monthly increase among the main expenditure groups at 6.97% in May 2025. Overall, while a gradual decline in annual inflation is observed, it is understood that price dynamics from services and shelter continue.

PRICE TRENDS OF FOOD AND NON-FOOD COMMODITIES

Price changes in the MEB components, calculated using the TurkStat data from the first quarter of 2023 to the second quarter of 2025, reveal economic vulnerabilities faced by households in Türkiye. This finding poses a critical challenge for the humanitarian cash and voucher assistance sector as the macroeconomic picture, characterized by exchange rate and cost inflation, has led to a challenge regarding to sustainability of humanitarian aid.

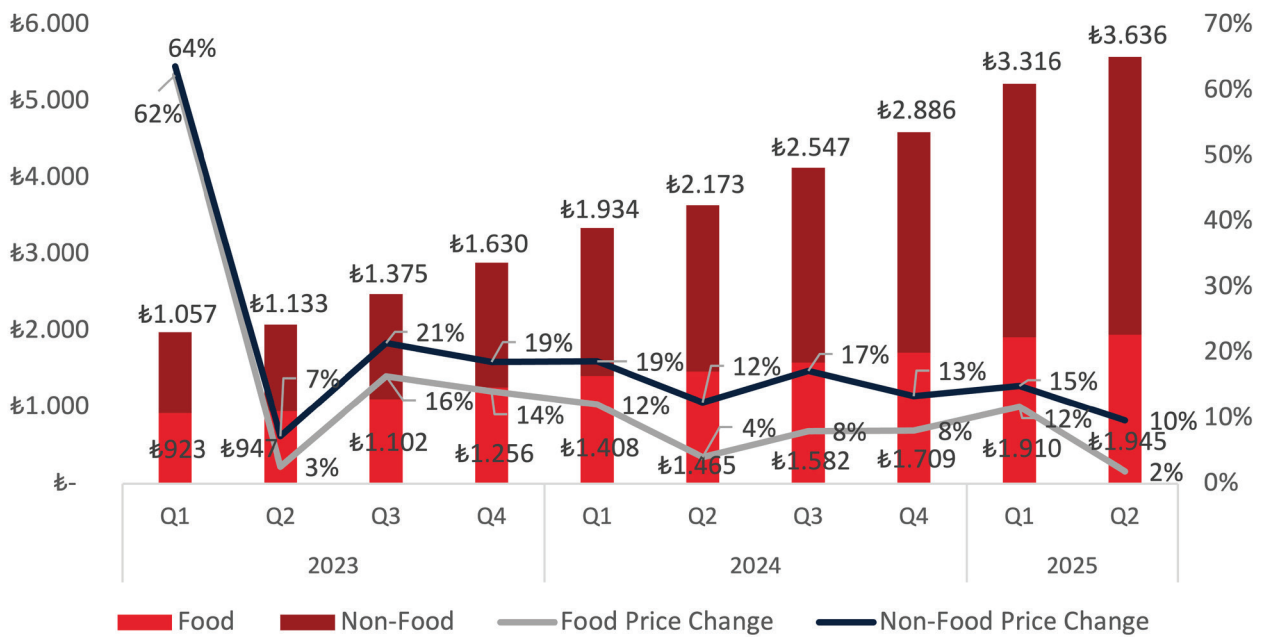


Figure 1 Quarterly Food and Non-Food Cost Levels and Price Changes

As shown in Figure 1, the distribution of food and non-food prices, the non-food component, including essential services such as rent, healthcare, and transport, has shown a greater increase than the food component since the first quarter of 2023. Following the high rate of increase in the first quarter of 2023, a flatter increase has been observed for both food and non-food items. While these rates are levelling off, they remain high on a quarterly basis, which suggests an imbalance in the goods market. The continuous increase in the cost of goods and services in the MEB reduces households' purchasing power, forcing them to allocate a large portion of their income to essential items such as food and rent⁴, thus leaving households unable to meet their other needs.

4 Türk Kızılay / Ministry of Family and Social Services, Social Safety Net Programmes Post-Distribution Monitoring Report, p. 10, "Expenditure". Available at: https://platform.kizilaykart.org/en/Doc/rapor/SSN_PDM_Report.pdf

COST OF BASIC NEEDS

The cost of living as measured by the Minimum Expenditure Basket (MEB) was seen around 35,158 TRY for ESSN and 31,268 TRY for C-ESSN households. Yet, this cost nearly doubled compared to the same period last year and has tripled in just two years.

Food and rent component of the MEB was remained at 1,945 TRY for an individual's food related needs and 14,962 TRY for rent in the second quarter of 2025. These figures represent a 33% increase in food costs and an 85% increase in rent compared to the same quarter last year. The minimum wage is able to cover the MEB cost of only 63% of ESSN and 71% of C-ESSN households.

Analysis of per capita MEB values in the second quarter of 2025 further confirms this economic trend, which affects different household categories to varying degrees. For ESSN households, the MEB per person was 5,390 TRY at the start of the quarter in March 2025 and increased by 3% to reach 5,568 TRY by May 2025. C-ESSN households experienced a similar but slightly higher increase, with their MEB rising from 6,982 TRY in March 2025 to 7,257 TRY in May 2025, marking a 4% growth.

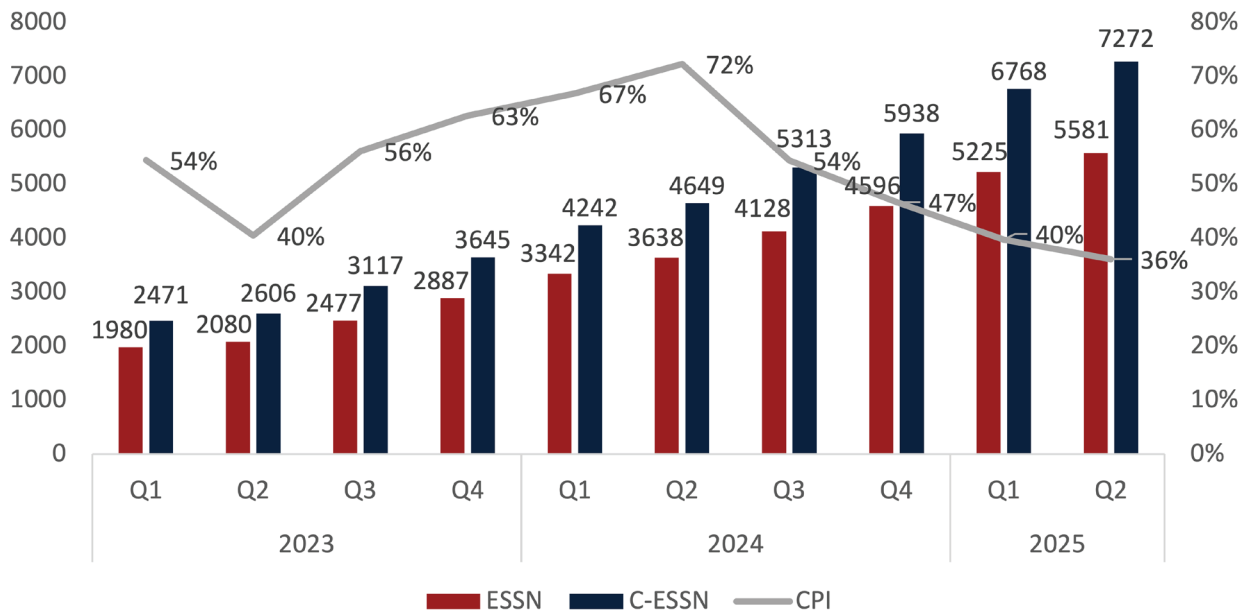


Figure 2 Quarterly Trends in CPI and Per Capita MEB by Recipient Status

Categories	Expenditure Prices
Food	₹ 1,945
Rent	₹ 13,485
Utilities (with water)	₹ 3,076
NFIs	₹ 2,165
Health	₹ 875
Education	₹ 338
Transportation	₹ 1,128
Communication	₹ 362
Total Without Food	₹ 22,906
Total ESSN	₹ 35,158
Total Per Capita ESSN	₹ 5,581
Total C-ESSN	₹ 31,268
Total Per Capita C-ESSN	₹ 7,272

Table 1 Expenditure Prices

The escalation of food and rent costs has been the main driver behind the overall increase in the MEB. Comparison with the first quarter of 2023 further highlights this dynamic, as rent alone has about tripled, with these two expenditure items accounting for nearly three-quarters of the basket for both ESSN and C-ESSN households. In addition, utilities account for 9% of the basket for ESSN households and 10% for C-ESSN households, while non-food hygiene items account for 6% for ESSN households and 7% for C-ESSN households. Lastly, transportation, health, education and communication have the lowest share in the MEB for both ESSN and C-ESSN households.

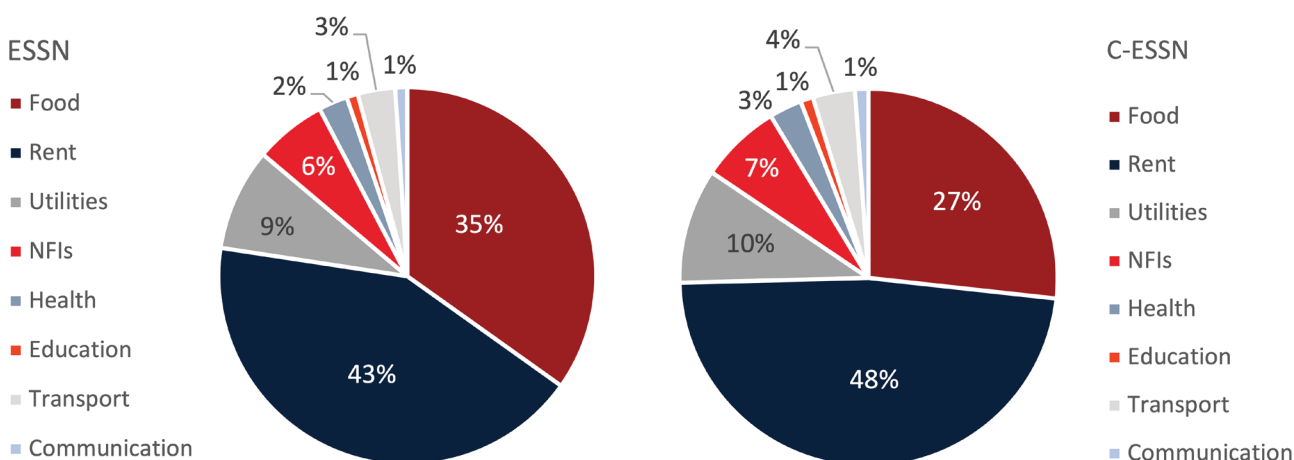


Figure 3 MEB Components' Share

*Calculations might slightly differ between household and individual costs due to the rounding of decimals.



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