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# SSN

THE SOCIAL SAFETY NET  
*Programme*



## Quarterly Price Monitoring Bulletin

2025 - Third Quarter



**KIZILAYKART**  
Cash Based Assistance  
*Programmes*



# **Quarterly Price Monitoring Bulletin**

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2025 - Third Quarter



**FOR FURTHER INQUIRIES PLEASE CONTACT**

Türk Kızılay KIZILAYKART, Monitoring and Evaluation Team - [TK\\_izlemevedegerlendirme@kizilay.org.tr](mailto:TK_izlemevedegerlendirme@kizilay.org.tr)

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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 Standards<sup>1</sup> which consists of six categories: food, shelter, education, health and protection<sup>2</sup>. 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 TurkStat<sup>3</sup> 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 – August 2025," Turkish Statistical Institute, TurkStat

## ECONOMIC SNAPSHOT

This bulletin focuses on the market prices of the period between June 2025 – August 2025. The consumer price index (CPI) continues to rise in the third quarter of 2025.

The general CPI data released by the Turkish Statistical Institute (TurkStat) indicates that the second quarter followed a volatile trend. In June 2025, the monthly inflation rate increased by 1.37%, with education and rent categories contributing most significantly to this rise. In July 2025, monthly inflation accelerated to 2.06%, while annual inflation eased slightly to 33.52%. In August 2025, monthly inflation moderated to 2.04%, and annual inflation declined further to 32.95%, indicating a continued downward trend on a yearly basis. Overall, the third quarter recorded an approximately 5.5% increase compared to the second 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 35.05% in June 2025 and further down to 32.95% in August 2025. By the end of the quarter, the exchange rate of the local currency in the parallel market continued to rise, averaging 40.68 TRY. During the preceding twelve-month period, the Turkish lira saw a depreciation of almost 22% in the foreign exchange market, and over two years, it exhibited a decline of 52%.



## Price Movements in Key Spending Groups

Examination of sub-expenditure groups in the third quarter, price increases were particularly concentrated in service and shelter related items. The education group reached an annual rate of 73.33% in June 2025 and, despite falling to 60.91% as of August 2025. The shelter sector, including rent, has continued to contribute significantly to inflation. The annual increase rate was 65.54% in June 2025, fell to 62.01% in July 2025, and stood at 53.27% in August 2025. On the other hand, the clothing group showed negative changes of -0.27% in June 2025, -5.82% in July 2025, and -0.71% in August 2025 on a monthly basis. A significant contraction trend was observed in the clothing group during the summer months. Despite the relative stabilisation of raw material costs, the rate of currency appreciation lagging behind inflation has constrained the competitiveness of domestic producers in foreign markets and increased the appeal of imported products in the domestic market, thereby suppressing domestic production<sup>4</sup>. Overall, while a gradual decline in annual inflation is observed, it is understood that price dynamics from services and shelter continue.

<sup>4</sup> TCMB, "Inflation Report 2025-III", (Analyses on the contribution of demand conditions to the disinflation process and the course of the output gap in the negative region).

## 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 third 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 cash assistance.

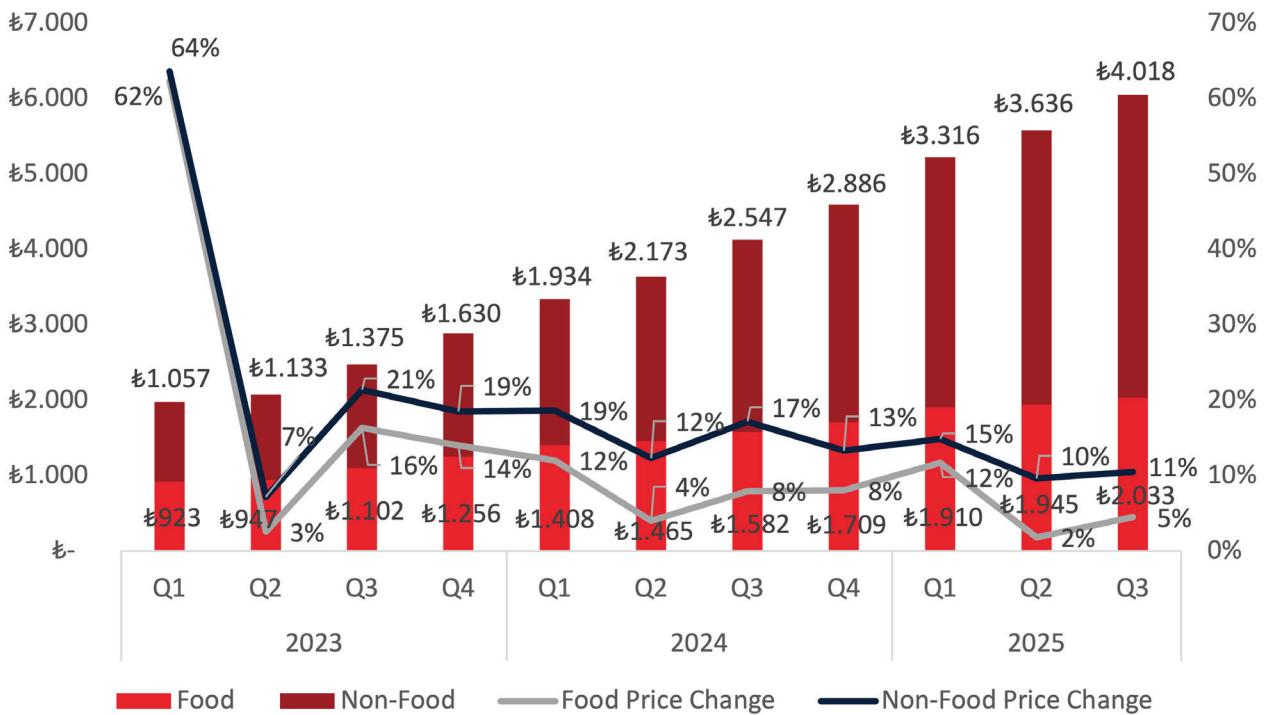


Figure 1 Quarterly Food and Non-Food Cost Levels and Price Changes

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 rent<sup>5</sup>, thus leaving households unable to meet their other needs.

<sup>5</sup> 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](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 38,118 TRY for ESSN and 34,053 TRY for C-ESSN households. Yet, this cost has increased by nearly 50% compared to the same period last year, and has more than doubled in just two years.

Food and rent component of the MEB was remained at 2,003 TRY for an individual's food related needs and 16,980 TRY for rent in the third quarter of 2025. These figures represent a 29% increase in food costs and an 74% increase in rent compared to the same quarter last year. The minimum wage is able to cover the MEB cost of only 58% of ESSN and 70% of C-ESSN households.

Analysis of per capita MEB values in the third quarter of 2025 further confirms this economic trend, which affects different household categories to varying degrees. For ESSN households, the MEB per person was 5,648 TRY at the start of the quarter in June 2025 and increased by 7% to reach 6,039 TRY by August 2025. C-ESSN households experienced a similar but slightly higher increase, with their MEB rising from 7,387 TRY in June 2025 to 7,904 TRY in August 2025, marking a 7% growth.

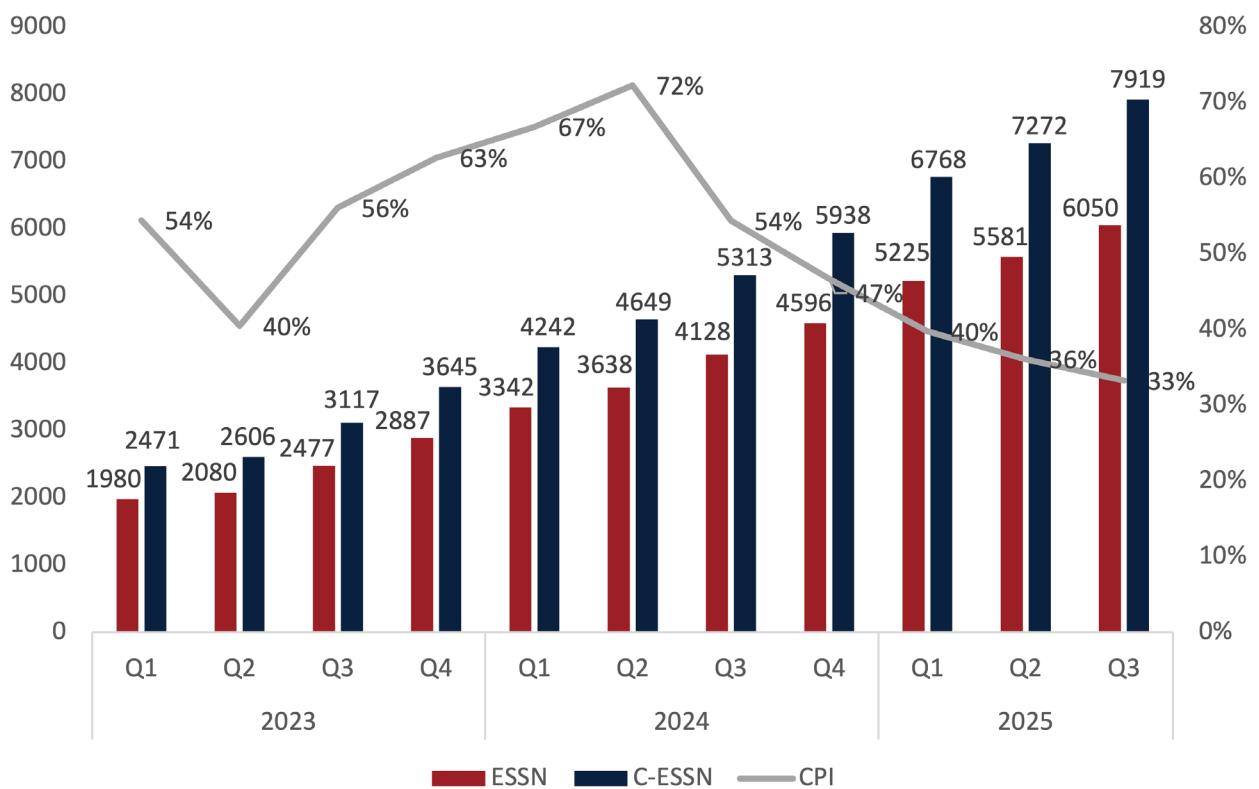


Figure 2 Quarterly Trends in CPI and Per Capita MEB by Recipient Status

Categories	Expenditure Prices
Food	₺ 2,003
Rent	₺ 16,980
Utilities (with water)	₺ 3,236
NFIs	₺ 2,270
Health	₺ 880
Education	₺ 348
Transportation	₺ 1,027
Communication	₺ 391
<b>Total Without Food</b>	<b>₺ 25,312</b>
<b>Total ESSN</b>	<b>₺ 38,118</b>
<b>Total Per Capita ESSN</b>	<b>₺ 6,050</b>
<b>Total C-ESSN</b>	<b>₺ 34,053</b>
<b>Total Per Capita C-ESSN</b>	<b>₺ 7,919</b>

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 8% 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.

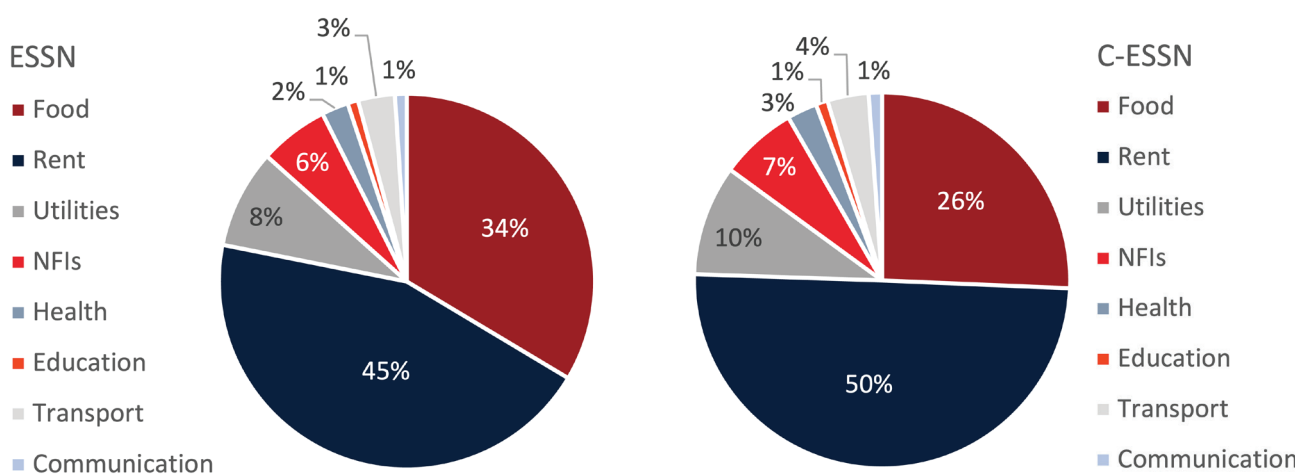


Figure 3 MEB Components' Share

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



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