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# SSN

## THE SOCIAL SAFETY NET *Programme*



# Quarterly Price Monitoring Bulletin

2025 - Fourth Quarter



**KIZILAYKART**  
Cash Based Assistance  
*Programmes*



# **Quarterly Price Monitoring Bulletin**

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2025 - Fourth Quarter



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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 - November 2025," Turkish Statistical Institute, TurkStat

## ECONOMIC SNAPSHOT

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

The general CPI data released by the Turkish Statistical Institute (TurkStat) indicates that the second quarter followed a volatile trend. In September 2025, the monthly inflation rate increased by 3.23%, with food and transportation categories contributing most significantly to this rise. In October 2025, monthly inflation accelerated to 2.55%, while annual inflation eased slightly to 32.87%. In November 2025, monthly inflation moderated to 0.87%, and annual inflation declined further to 31.07%, indicating a continued downward trend on a yearly basis. Overall, the fourth quarter recorded an approximately 7.4% increase compared to the third 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 33.29% in September 2025 and further down to 31.07% in November 2025. By the end of the quarter, the exchange rate of the local currency in the parallel market continued to rise, averaging 42.25 TRY. During the preceding twelve-month period, the Turkish lira suffered a depreciation of almost 22% in the foreign exchange market, and over a two-year period, it exhibited a decline of 48%.

## Price Movements in Key Spending Groups

Examining sub-spending groups in the fourth quarter reveals that price increases were particularly concentrated in services and housing. One of the key components of Turkish consumer price indices, the housing sector continued to contribute significantly to inflation due to rent and other housing-related expenses. The annual price increase in the housing sector was 51.36% in September 2025, falling to 50.96% in October 2025 and 49.92% in November 2025. Although this development indicates a limited slowdown in annual inflation, price pressures in the housing sector continue due to the inflexibility of rent prices, limitations in housing supply, and price adjustments linked to past inflation. As a result, price increases in the services sector continue to have a strong impact on overall inflation.

In contrast, the clothing group showed an increase on a monthly basis in the last quarter of the year, in line with seasonal effects. Price movements, which were weak during the summer months due to discount campaigns, showed an upward trend in the autumn period with the arrival of new season products on the market. In this context, the monthly price change in the clothing group was 3.92% in September 2025, 12.42% in October 2025, and 0.68% in November 2025. Overall, although a gradual downward trend in annual inflation was observed in the last quarter of the year, ongoing price dynamics, particularly in services and housing, caused inflation to remain at high levels. Therefore, it is understood that the decline in inflation has been limited and gradual.

## 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 fourth 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.

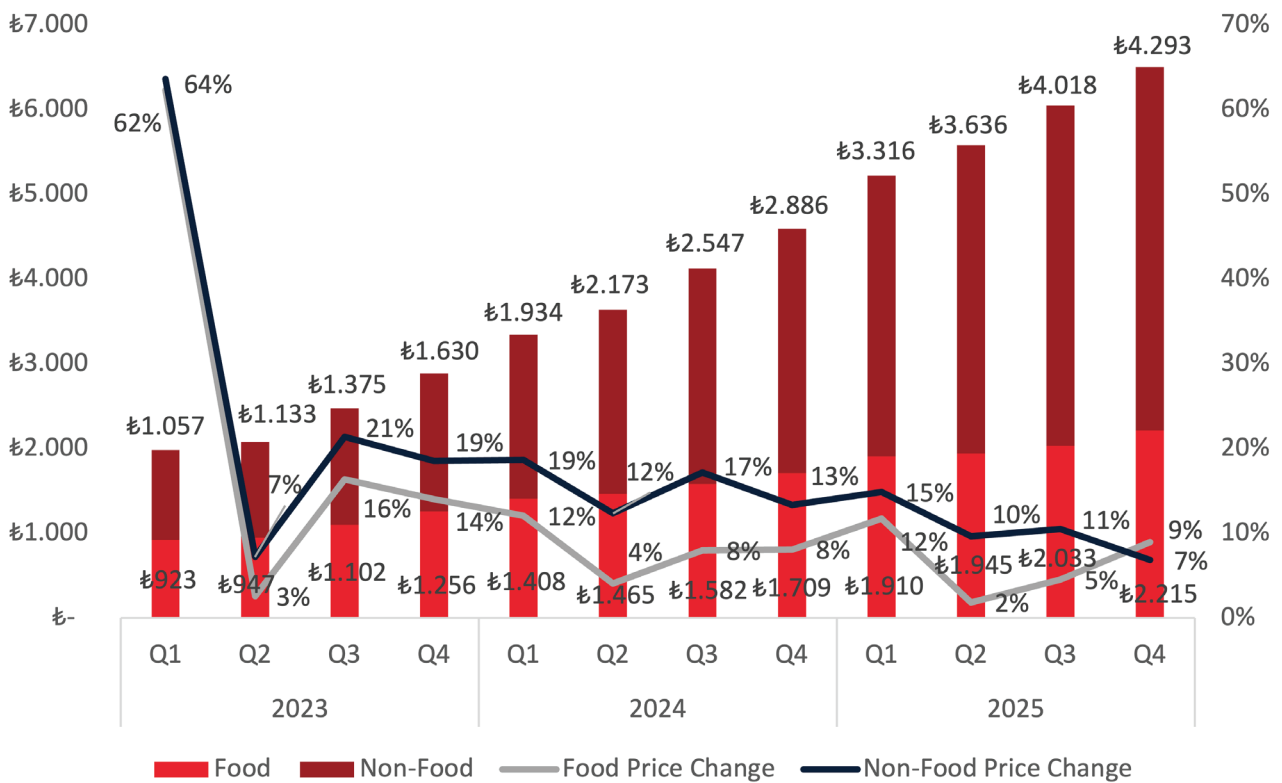


Figure 1 Quarterly Food and Non-Food Cost Levels and Price Changes

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>4</sup>, thus leaving households unable to meet their other needs.

<sup>4</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 40,997 TRY for ESSN and 36.567 TRY for C-ESSN households. Yet, this cost has increased by nearly 42% 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 2,215 TRY for an individual's food related needs and 18,390 TRY for rent in the fourth quarter of 2025. These figures represent a 30% increase in food costs and an 60% increase in rent compared to the same quarter last year. The minimum wage is able to cover the MEB cost of only 54% of ESSN and 60% of C-ESSN households.

Analysis of per capita MEB values in the fourth quarter of 2025 further confirms this economic trend, which affects different household categories to varying degrees. For ESSN households, the MEB per person was 6,288 TRY at the start of the quarter in September 2025 and increased by 5% to reach 6,586 TRY by November 2025. C-ESSN households experienced a similar increase, with their MEB rising from 8,224 TRY in September 2025 to 8,621 TRY in November 2025, marking a 5% growth.

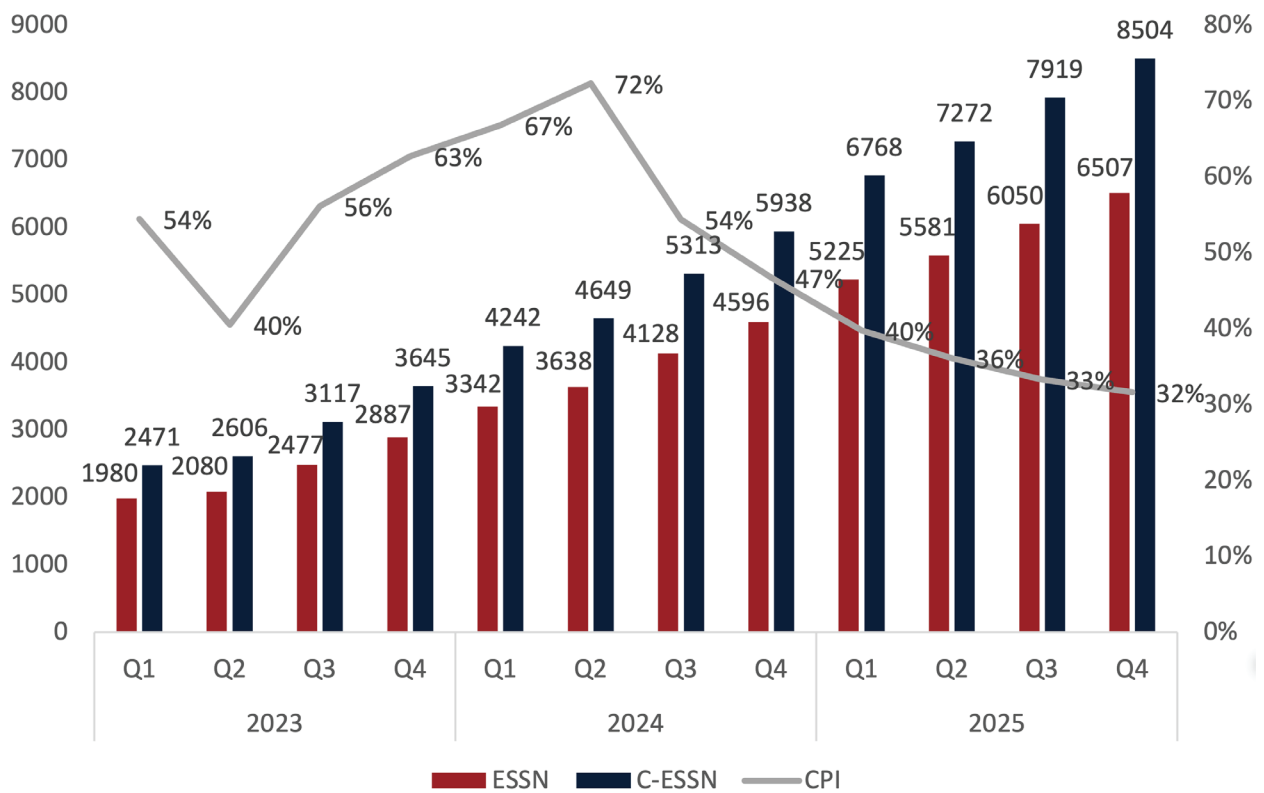


Figure 2 Quarterly Trends in CPI and Per Capita MEB by Recipient Status

Categories	Expenditure Prices
Food	₺ 2,215
Rent	₺ 18,390
Utilities (with water)	₺ 3,358
NFIs	₺ 2,294
Health	₺ 881
Education	₺ 353
Transportation	₺ 1,368
Communication	₺ 398
<b>Total Without Food</b>	<b>₺ 27,043</b>
<b>Total ESSN</b>	<b>₺ 40,997</b>
<b>Total Per Capita ESSN</b>	<b>₺ 6,507</b>
<b>Total C-ESSN</b>	<b>₺ 36,567</b>
<b>Total Per Capita C-ESSN</b>	<b>₺ 8,504</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 9% for C-ESSN households, while non-food hygiene items account for 6% for ESSN households and 6% for C-ESSN households. Lastly, transportation, health, education and communication have the lowest share in the MEB for both ESSN and C-ESSN households.

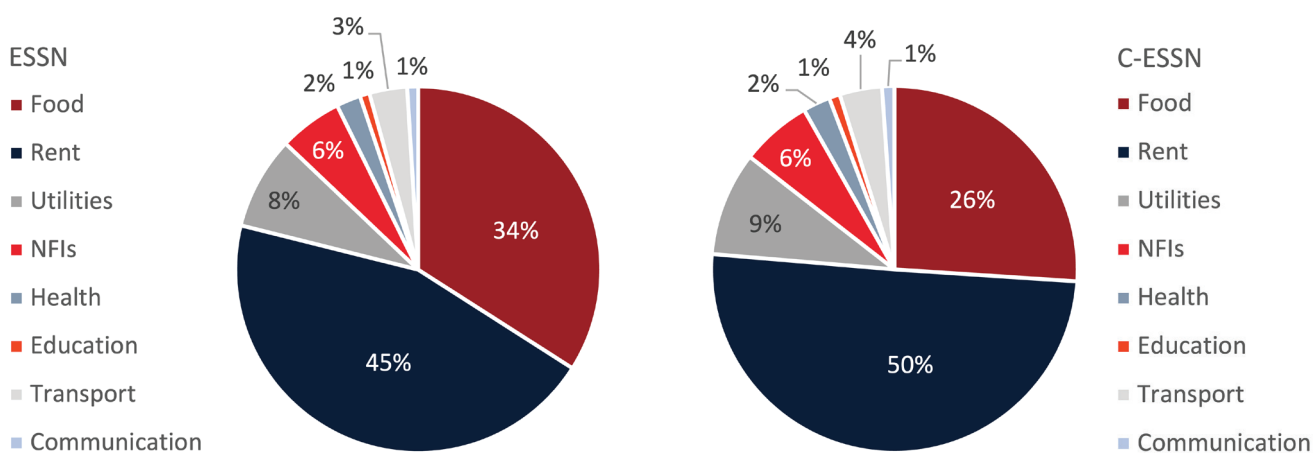


Figure 3 MEB Components' Share

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



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