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# SSN

THE SOCIAL SAFETY NET  
*Programme*



## Quarterly Price Monitoring Bulletin

2026 - First Quarter



**KIZILAYKART**  
Cash Based Assistance  
*Programmes*



# Quarterly Price Monitoring Bulletin

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2026 - First Quarter



**FOR FURTHER INQUIRIES PLEASE CONTACT**

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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.

<sup>1</sup> Sphere Standards Handbook

<sup>2</sup> The protection component covers transportation and communication.

<sup>3</sup> TurkStat, "Consumer Price Index - February 2026," Turkish Statistical Institute, TurkStat

## ECONOMIC SNAPSHOT

This bulletin focuses on the market prices for the period between December 2025 to February 2026. A dynamic trend in the Turkish Consumer Price Index (CPI) was observed at the end of 2025 and the beginning of 2026, characterized by a significant increase in January due to various price adjustments. Turkish Statistical Institute (TÜİK) data indicates a volatile start to the quarter as the monthly inflation rate was recorded at 1.50% in December 2025, followed by a sharp rise to 6.20% in January 2026. This spike was primarily driven by the annual increase in the minimum wage, which triggered a ripple effect across the entire market, leading to upward pressure on the prices of goods and services. Inflation declined in February 2026 and stabilized at 3.15% monthly. The primary cause of the high inflation in February was the closure of the Strait of Hormuz and the resulting shock effect which led to a rapid surge in oil prices.

Despite these monthly increases, the annual inflation rate continued to decline due to the base effect. The annual CPI fell from 30.89% in December 2025 to 30.65% in January 2026 but rose to 31.53% in February 2026 due to the spike in oil prices. By the end of the quarter, the Turkish Lira continued to lose value against the U.S. Dollar, trading at an average of 42.80 TRY. Over the course of the year, the Turkish Lira depreciated by approximately 21%, bringing its total depreciation to 42% over the past two years.



## Price Movements in Key Spending Groups

Price pressures were concentrated in certain expenditure categories during this period, particularly services and housing. Education remained the category with the highest annual price increase, standing at 66% in December 2025. This pressure continued into the new year, with the annual rate for the education sector falling to around 56% by February 2026, following a monthly increase of approximately 4%. In December 2025, housing recorded the second-highest annual increase at 49%, and continued to be a primary driver of inflation, particularly due to rising rents. From December to February, prices increased by 7%, bringing the annual rate to 42% in February 2026. During this period, insurance and financial services (20%), as well as health services (17%), were the groups with the highest costs, primarily due to the sharp increase observed in January 2026. Conversely, clothing and footwear expenditure declined by 10% over the quarter, with a further 5% decrease in February 2026.

## PRICE TRENDS OF FOOD AND NON-FOOD COMMODITIES

Price changes in the MEB components, calculated using the TurkStat data from the first quarter of 2024 to the first quarter of 2026, 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 context, characterized by exchange rate volatility and cost inflation, raises concerns about the sustainability of cash assistance.

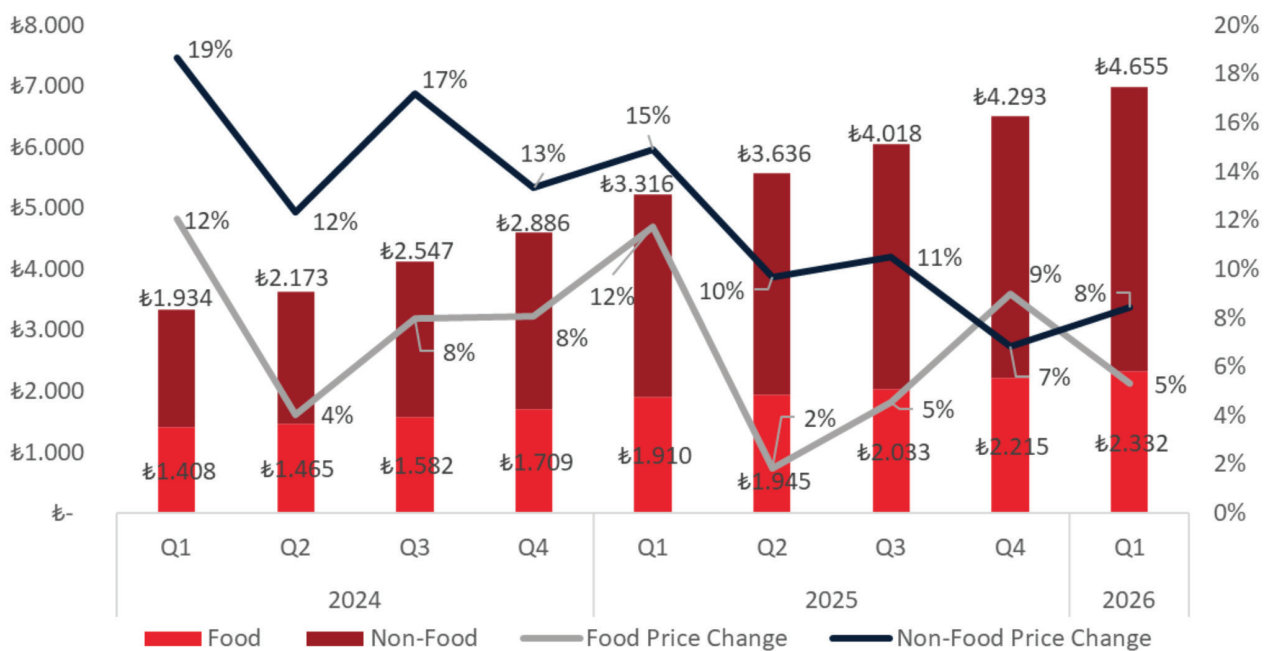


Figure 1 Quarterly Food and Non-Food Cost Levels and Price Changes

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 2024. Following the high rate of increase in the first quarter of 2024, 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. 12, "Expenditure". Available at: [https://platform.kizilaykart.org/tr/Doc/rapor/SSN\\_PDM\\_3\\_Report.pdf](https://platform.kizilaykart.org/tr/Doc/rapor/SSN_PDM_3_Report.pdf)

## COST OF BASIC NEEDS

The cost of living as measured by the Minimum Expenditure Basket (MEB) remained volatile compared to the previous quartile, averaging 44,017 TRY for ESSN and 39,353 TRY for C-ESSN households. Yet, this cost approximately increased 40% compared to the same period last year and has doubled in just two years.

In the first quarter of 2026, the food and rent components of the MEB were set at TRY 2,332 for an individual’s food needs and TRY 20,063 for household rent. These figures represent a 27% increase in food costs and a 57% increase for rent compared to the same quarter of the last year. The minimum wage covers only 64% of the MEB cost for ESSN households and 71% for C-ESSN households.

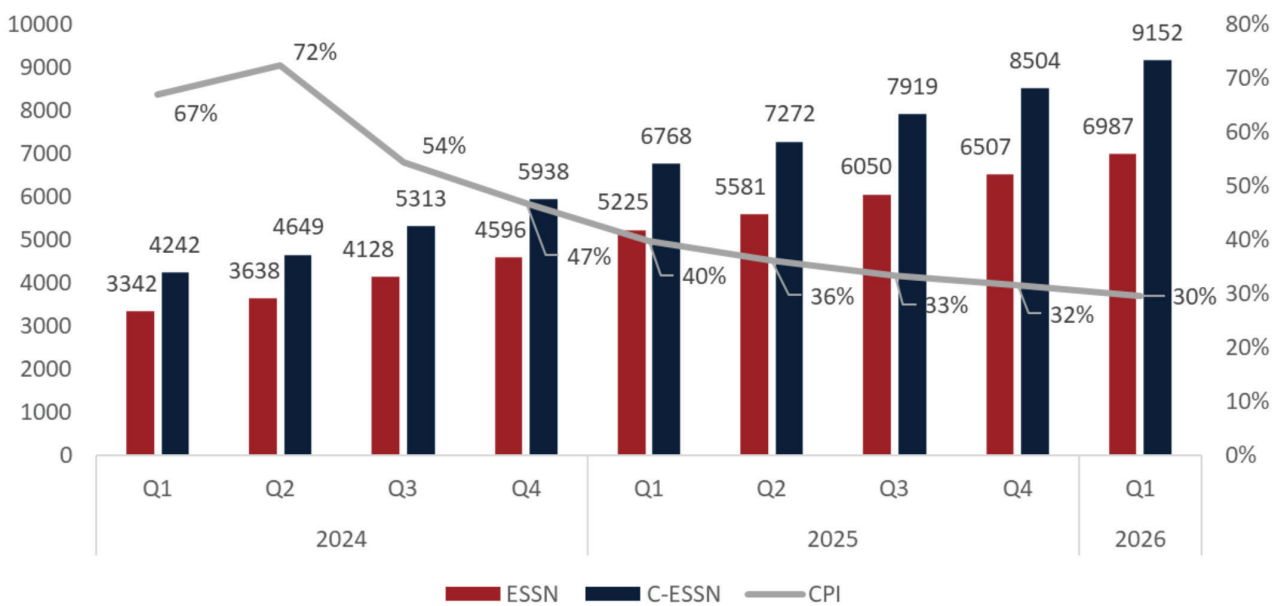


Figure 2 Quarterly Trends in CPI and Per Capita MEB by Recipient Status

Analysis of per capita MEB values in the first quarter of 2025 further confirms this economic trend, which affects different household categories to varying degrees. For ESSN households, the MEB per person was 6,690 TRY at the b of the quarter in December 2025 and increased by 8.8% to reach 7,280 TRY by February 2026. C-ESSN households experienced a similar but slightly higher increase, with their MEB rising from 8,763 TRY in January 2025 to 9,526 TRY in February 2026, marking 8.7% growth.

Categories	Expenditure Prices
Food	₺ 2,332
Rent	₺ 20,063
Utilities (with water)	₺ 3,563
NFIs	₺ 2,382
Health	₺ 1,052
Education	₺ 365
Transportation	₺ 1,448
Communication	₺ 452
<b>Total Without Food</b>	₺ 29,324
<b>Total ESSN</b>	₺ 44,017
<b>Total Per Capita ESSN</b>	₺ 6,987
<b>Total C-ESSN</b>	₺ 39,353
<b>Total Per Capita C-ESSN</b>	₺ 9,152

Table 1 Expenditure Prices

The escalation of food and rent costs has been the main driver of the overall increase in the MEB. Comparison with the first quarter of 2024 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 5% 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.

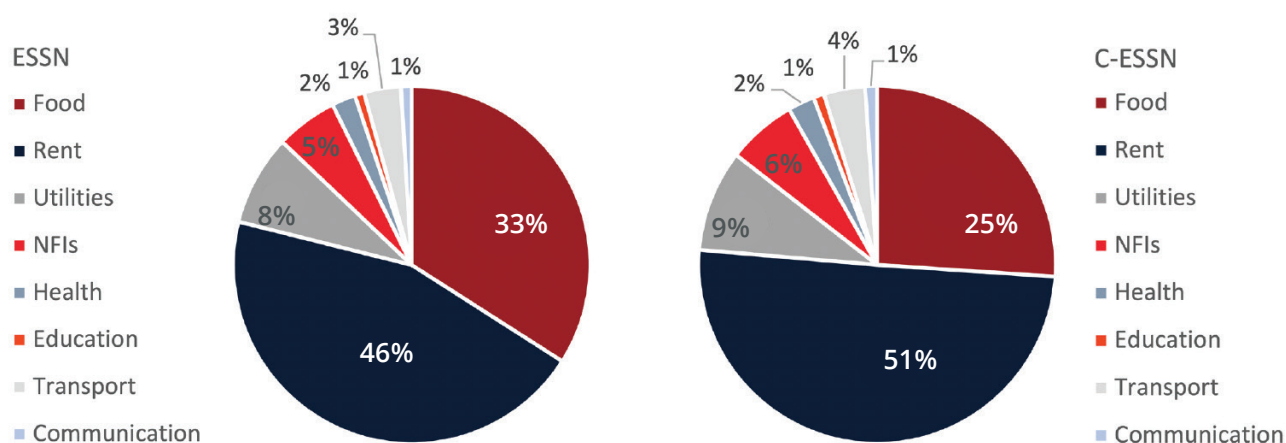


Figure 3 MEB Components' Share

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



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