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TÜRK KIZILAY

SSN

THE SOCIAL SAFETY NET *Programme*

3rd Market Assessment Report

Nov'25

KIZILAYKART
Cash Based Assistance *Programmes*

3rd Market Assessment Report

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CONTENTS

ACRONYMS AND ABBREVIATIONS

C-ESSN	Complementary Emergency Social Safety Net
CPI	Consumer Price Index
ESSN	Emergency Social Safety Net Project
FAO	Food and Agriculture Organization of United Nations
MEB	Minimum Expenditure Basket
MA	Market Assesment
SSN	The Social Safety Net Programme
TRC	Türk Kızılay (Turkish Red Crescent)
TRY	Turkish lira

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Introduction

Background

The Social Safety Net (SSN) Programme is a comprehensive, cash-based assistance initiative that supports the most vulnerable households in Türkiye, residing under Temporary Protection, International Protection, or holding a Humanitarian Residence Permit. Launched on 17 July 2023, the SSN Programme is funded by the European Union and implemented by the Ministry of Family and Social Services in cooperation with Türk Kızılay (Turkish Red Crescent). 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, shelter and clothing, of vulnerable households with dignity.

In order to optimize programme effectiveness, a comprehensive market assessment study is being conducted periodically. This study consists of two complementary yet distinct studies aimed at understanding market dynamics from both the supply and demand perspectives. The demand side provides a comprehensive breakdown of the most commonly consumed food items among the target population, highlighting trends in purchasing rates and consumer behaviour. These elements are examined in detail to better understand the nutritional diversity and consumption habits of the ESSN, C-ESSN and non-recipient households. While the supply-side examines local and Syrian vendor capacity, sales patterns, the effect of voluntary return on the markets, vendor challenges, and adaptive responses to economic pressures. Incorporating a dual-component analytical framework, the market assessment study informs the Minimum Expenditure Basket (MEB) methodology that determines transfer values.

Economic Overview

The current economic conditions in Türkiye directly impacts the purchasing habits in the country. The persistently high consumer prices continue to put pressures on both supply and demand, making it increasingly difficult for households to access goods and services across various sectors. In June 2025, the Turkish Lira (TRY) averaged roughly 39.48 TRY per US Dollar (USD) reflecting the ongoing depreciation of the exchange rate. Meanwhile, the Consumer Price Index (CPI) increased by 35.05% compared to June 2024, while the monthly inflation rate between May and June 2025 increased by 1.37%. According to TURKSTAT data, the cost of food items included in the MEB has risen by 32% over the past year.[1]

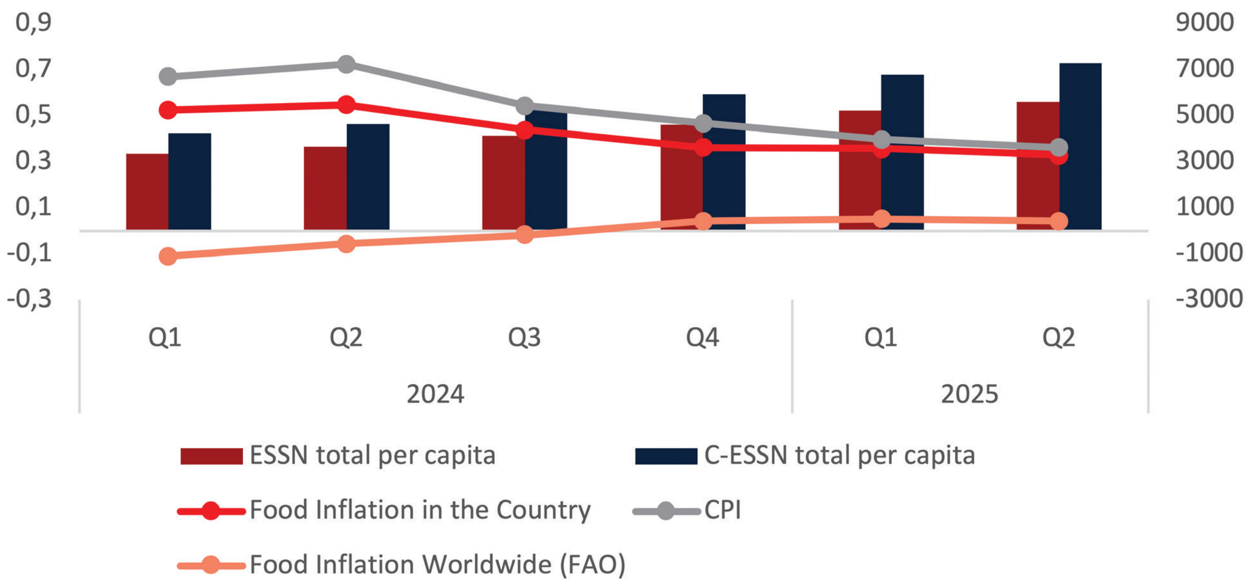

Figure 1 *CPI, Food Inflation in Country-Worldwide, MEB Amount of Recipient Groups*

1 The Central Bank of the Republic of Turkey. (July, 2025). CPI. https://www.tcmb.gov.tr/wps/wcm/connect/EN/TCMB+EN/Main+Menu/Statistics/Inflation+Data/Consumer+Prices accessed 01.08.2025

Hence, both overall inflation and food inflation have persisted in Türkiye over the past year according to TURKSTAT. Although a slight decline has been recorded, the rate remains at approximately 30%. In parallel, per capita food consumption expenditures among ESSN and C-ESSN household groups have continued to steadily increase. Conversely, an opposite trend is observed at the global level. While no notable global food inflation was recorded last year, food prices have begun to rise modestly in the current year. A detailed examination of food prices indicates that the impact of inflation has been reflected relatively uniformly across most items. However, the data reveal a divergent trend for cucumbers and eggs. The sharp fluctuations in cucumber prices are considered to be seasonal, whereas the significant increase in egg prices is not attributed to production-related factors, but rather to substantial price disparities between markets, as stated by the Turkish Ministry of Trade.[2]

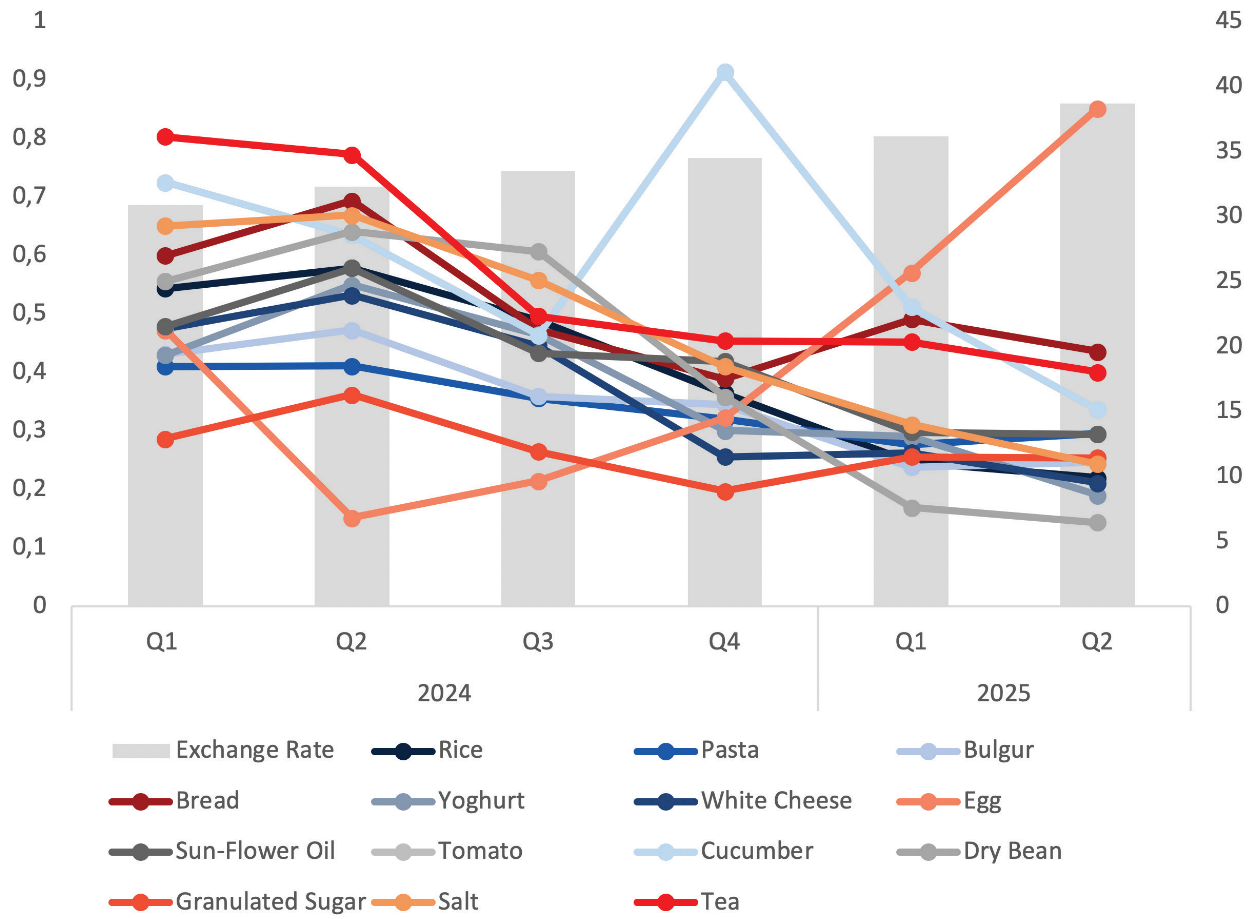

Figure 2 *Food Inflation per item*

2 GZT. (18 November 2024). Ticaret Bakanlığı harekete geçti: Yumurta fiyatları neden artıyor? https://www.gzt.com/jurnalist/ticaret-bakanligi-harekete-gecti-yumurta-fiyatlari-neden-artiyor-3791023 accessed 12.08.2025

Key Findings

- Voluntary returns have had a slightly negative impact on Syrian vendors in terms of sales amounts and supplying products.
- While cereal consumption exceeds 80%, red meat consumption remains low (12% among C-ESSN, 23% among ESSN, and 20% among non-recipient households).
- Households are experiencing a decline in variety and amount of dietary.
- Persistent inflation has reduced both the number of customers and overall sales volume.
- Syrian vendors have a more limited supply capacity compared to local vendors.
- Due to rapidly increasing prices, vendors prefer to procure products for longer periods; however, small-scale vendors can only restock on a monthly basis.

Methodology

Research Design

A mixed-methods approach was used combining both quantitative and qualitative techniques. Quantitative tools comprised of market assessment surveys, price checklists and web-scraping while the qualitative side involved key informant interviews (KIIs) and structured observation forms. The survey questions were designed by Türk Kızılay KIZILAYKART Monitoring and Evaluation (M&E) Team.

Data Collection

Data collection took place between 5-19 May 2025 by Türk Kızılay field staff using the ODK Platform (Open Data Kit). The data was cleaned and analysed using MAXQDA Software. Initially Türk Kızılay 168 Call Center conducted phone interviews with ESSN, C-ESSN recipients, and non-recipients to gather insights of their consumption habits. This was followed by face-to-face key informant interviews (KIIs) with market and bazaar vendors. The informants were selected based on their strong understanding of current market conditions. Additionally; product prices, availability, and variety were monitored using web scraping tools on chain market websites. Finally, the field staff manually recorded product prices in markets and bazaars during field visits using standardized checklists. The M&E team organized informative sessions to conduct the study efficiently with the field staff.

Data Collection	Method	Location	Number of Surveys
Vendors • Syrian Shops • Local Shops • Bazaars	KIIs Observation forms	Ankara İstanbul Gaziantep Şanlıurfa İzmir and Adana	133 KIIs 110 Observation Forms
Consumers	Phone Surveys	Türkiye	1155 Phone Interviews (385 ESSN 385 C-ESSN 385 Non-recipient)
Prices	Web-scraping Field Observations	Ankara İstanbul Gaziantep Şanlıurfa İzmir and Adana	110 Price Checklists

***Table 1** Details of the Study*

Sampling and Geographical Area

Random sampling method was used for beneficiary selection with 95 per cent confidence interval and 5 per cent margin of error. To ensure nationwide representation, a total of 1,155 individuals composing of 385 ESSN recipients, 385 C-ESSN recipients and 385 non-recipients were interviewed. Field observations, KIIs and price checklists were carried out in the six cities with the highest density of refugee populations namely, Ankara, Gaziantep, İstanbul, Şanlıurfa, İzmir, and Adana. Due to capacity limitations, a snowball sampling technique was utilized to select market owners for the 133 KIIs. 110 field observation forms and price checklists were filled covering 14 districts across these six cities.

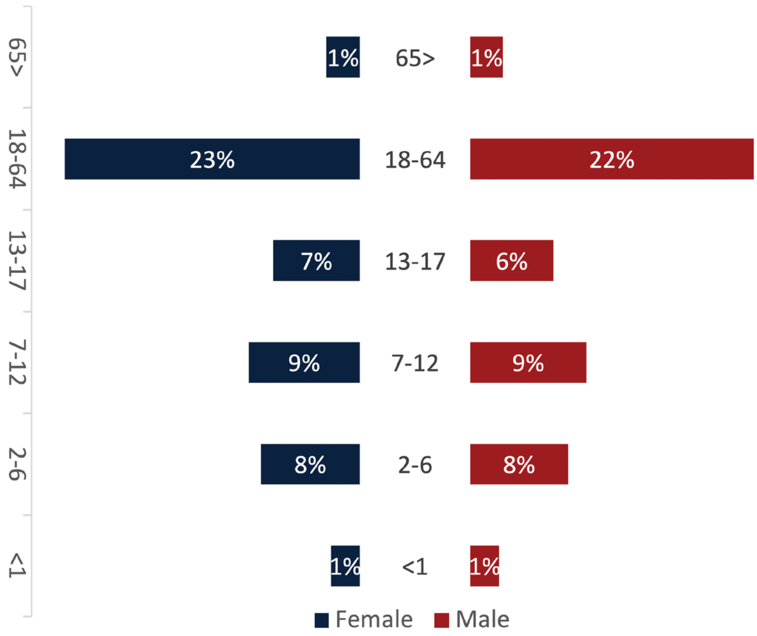

Figure 3 *Demographic Profiles of the Interviewed Households*

Figure 4 *Map of the Market Assessment Study Sample*

Outcomes

The Effect of Voluntary Return on Markets

Sales decline amid inflation and voluntary return in Syrian markets.

Since December 8th 2024, around 441,000 Syrians have voluntarily returned to Syria.[3] This increase in voluntary returns has had a noticeable effect on markets in Türkiye. Among local markets, Syrian markets and bazaars; Syrian market vendors have been impacted the most. As Syrians make up the majority of their customer base, vendors reported a decline in their customers. Vendors also reported that some of suppliers have also returned to Syria, leading to shortages in certain products. Additionally, there has been a decrease in the the number of Syrian markets as some Syrian vendors themselves have returned. It is important to note that the decline has had a noticeable but not a severe impact, as the voluntary return of the Syrian population across the country is a gradual and ongoing process.

3 BBC News. (30 May 2025). Türkiye'de yaşayan Suriyelilerin sayısında son dönemde nasıl bir değişim yaşandı? https://www.bbc.com/turkce/articles/c0j7ex3ndl3o

"There are people re-turning to Syria, so I have fewer customers now. One more is going back next week."

Syrian market vendor

"Some suppliers have also started returning to Syria. I can no longer procure every product I need."

Syrian market vendor

"There has been a decrease in the number of customers. The quantity of goods sold has also declined, and in cases where they can't afford it, customers are unable to make purchases."

Local Market Vendor

"Sales numbers have dropped, and people have started turning to cheaper and lower-quality products."

Syrian Market Vendor

"Prices are increasing month by month. I'm a small grocery store, so I can't procure many products, and that's why I'm losing money."

Syrian Market Vendor

The Impact of Rising Prices

The decline in customer numbers has been attributed not only to voluntary returns but also to the ongoing inflation in the country. While local market vendors did not highlight voluntary returns as a concern, they frequently emphasized that inflation has significantly reduced their customer numbers. The total prices of the food items increased by 32 per cent since last year.[4] As a result, both Syrian and local market vendors emphasized that rising prices have led to a decline in sales, as well as limiting their procurement capacity. Vendors with limited procurement capacity cannot buy in bulk, hence are forced to purchase in smaller quantities and more frequently. This makes them more vulnerable against chain markets in an environment of rapid price changes.

In addition, customers tend to buy cheaper items and in smaller quantities, and the overall number of customers has also diminished. In general, shopping is limited to only covering basic needs. To cope with rising prices household frequently apply for less preferred or cheaper food. Even adults in households restrict their food intake for children to eat more.[5] Consequently, chain markets have become more preferable for customers since they offer access to cheaper products. The shift toward chain markets may indicate a preference for more stable prices, wider product availability, or promotional offers, factors that small vendors struggle to compete with. This situation highlights the growing financial strain on both vendors and consumers, especially in informal and small-scale markets.

4 The Central Bank of the Republic of Turkey, CPI (July, 2025) https://www.tcmb.gov.tr/wps/wcm/connect/EN/TCMB+EN/Main+Menu/Statistics/Inflation+Data/Consumer+Prices accessed 01.08.2025

5 Ibid.

Spending and Payment Patterns Across Local and Syrian Markets

The spending habits were asked in a comparative manner regarding both Syrian and local markets. It was observed that chain supermarkets are the most preferred shopping place and local markets follow in second for all groups. Syrian market vendors noted that Turkish customers tend to buy only a few specific items, such as bread and soft drinks. In contrast, Syrian customers usually purchase a wider range of products from Syrian markets. Among these are canned items like salami and tuna, which are reported as some of the best-selling products of Syrian markets. Snacks, soft drinks, spices, and coffee are some other particular items demanded from Syrian markets. Although most customers maintained consistent demand across product categories, some vendors highlighted a seasonal rise in demand for specific items such as ice cream and cold soft drinks. Given spices are culturally specific products, they are mostly bought from Syrian markets, while oil and sugar products mostly sourced from chain markets. It important to note that, since the variety and quantity of items are more limited in Syrian markets than local markets, customer choices are also restricted. Conversely, food and non-food items are cheaper in Syrian markets, bargaining and loaning culture is more common in Syrian markets compared to local markets.

On the other hand, while local market vendors mentioned no significant difference in the variety of products purchased by Turkish and Syrian customers, the quantity often differs. As Syrian families tend to have larger households they tend to purchase in larger quantities. In terms of payment methods, local markets offer more options including credit, credit cards, and cash, compared to Syrian markets which mainly rely on credit and cash. In addition, local markets allow customers to buy on loan only if they are well-known to the vendor as opposed to Syrian markets. Vendors noted that without this payment method, selling products would not be possible, as most households borrow primarily for food purchases from both local and Syrian shops, making debts to markets the main source of household indebtedness.[6]

6 Türk Kızılay. (2025). The Second Post Distribution Monitoring Report. Unpublished.

"Foreigners usually don't ask about prices or anything like that. The local population, however, tends to question prices more due to the rising costs."

Local Market Vendor

"Syrians tend to prefer bread, canned products, and instant noodles."

Syrian Market Vendor

"Due to seasonal changes, these days the customers tend to buy more soft drinks and ice-cream."

Syrian Market Vendor

“The weather is getting cooler after 5 pm. and especially during Ramadan, children get out of school and some people come after work, so they are mostly available in the afternoon. Toward the evening, prices drop slightly due to the decline in product quality.”

Bazaar Vendor

“At the end of the day, we leave the leftovers, and people take them for free.”

Bazaar Vendor

“When fewer products come from the region, they go into the black market, and then we can’t find the products. We experience this more when there is frost or flooding in the greenhouses”

Bazaar Vendor

Situation in Bazaars

The summer harvest brought a greater quantity and variety of products to the market, although overall prices have increased due to inflation. This seasonal abundance often leads to lower prices for many items, boosting sales and encouraging people to purchase more compared to the winter months which was also emphasized by bazaar vendors. Unless there are unexpected weather changes, vendors generally report no issues with product supply. However, this year a sudden frost in the spring reduced crop yields, causing a steep increase in prices in fruits such as figs, cherries, grapes and plums.

Bazaars are the most popular places to buy fruits and vegetables. Syrian households buy more fruits and vegetables than local households, mainly due to their larger household sizes. Normally, for fruits and vegetables to stay fresh, vendors typically buy only as much as they can sell in a day. Nevertheless, products that are not sold during the day are usually taken to a different marketplace to be sold the next day or toward the end of the day, they are being sold at lower prices. For this reason, the bazaar is usually at its busiest after 5 p.m. Additionally, it has been observed that some vendors give out their produce for free to vulnerable customers in need towards the evening hours.

Food Consumption Habits

On the consumer side, it is evident that food consumption habits are shaped by price fluctuations. Due to the high inflationist economy, all food items' prices sky rocketed, which makes purchasing nutritious food items more difficult for vulnerable households. Hence, based on data obtained from the market assessment, it was identified that C-ESSN households face hardships in accessing nutritious food items than ESSN and non-recipient households. There are certain items that most households consume, regardless of recipient status. The top 5 items are; tomato, bread, eggs, rice and sugar respectively. Figure 2 reveals the disinflation in all items except from eggs. Despite long term disinflation, inflation still remains in high levels. Egg prices is the only item which saw an increasing trend. Yet, increasing price of eggs have not affected their high consumption rates since, eggs are still cheaper compared to other protein sources such as cheese, meat and chicken.

Cereals and Grains	C-ESSN	ESSN	Non-recipient
Bread	88%	86%	89%
Rice	83%	84%	84%
Bulgur	66%	77%	73%
Potato	60%	71%	68%
Pasta	59%	67%	69%

Table 2 *Consumption Rate of Top 5 Grains*

Analysing the consumption categories in detail, the consumption of **cereals and grains** was observed to be very common among all households regardless of recipient status. Bread stands out as the top preferred item, followed by rice and bulgur. Due to cultural habits, rice and bulgur are preferred over pasta.

Due to the summer season, **vegetables** such as tomatoes and cucumbers are consumed at a high rate, ranking almost the same as cereals. The rate of vegetables consumed changes seasonally, hence cucumber follows tomato in the consumption pattern as their prices drop in the summer. Although lower, zucchini, peppers, lettuce and spinach are also preferred. In general, households consume vegetables 1 or 2 days in a week.[7]

Vegetable and Leaves	C-ESSN	ESSN	Non-recipient
Tomatoes	93%	95%	95%
Cucumber	71%	83%	80%
Onion	49%	48%	46%
Parsley	44%	44%	43%
Eggplant	42%	54%	51%

Table 3 *Consumption Rate of Vegetables and Leaves*

Third consumption category appears to be meat, fish and eggs. However, eggs and chicken are the main protein sources of households regardless of recipient groups. The average consumption rate of these two items are 79 per cent, meaning that 21 per cent of households cannot access neither eggs nor chicken. Chicken is accessible and affordable, making it a more cost-efficient than fish and red meat products. When it comes to beef, only 18 per cent of households can consume beef, leaving out 82 per cent. C-ESSN recipient's consumption of beef is the lowest comparing to ESSN and non-recipient households. Compared to the 2nd Market Assessment Report, ESSN households increased their red meat consumption, though C-ESSN households' red meat consumption remained the same, which reveals the vulnerability of C-ESSN households.

Meat, Fish and Eggs	C-ESSN	ESSN	Non-recipient
Eggs	76%	85%	85%
Chicken	72%	75%	78%
Beef	11%	23%	20%
Fish	4%	11%	7%

Table 4 *Consumption Rate of Meat, Fish and Eggs*

As for weekly consumptions, it was seen white meat was consumed one day in a week, while red meat was never consumed.[8] Since fish and organ meat are not culturally common food items, their consumption rates are among the lowest in this category.

7 Ibid.

8 Ibid.

Dairy Goods	C-ESSN	ESSN	Non-recipient
Yogurt	77%	83%	83%
Boxed Milk	45%	56%	45%
Cheese	40%	53%	49%

Table 5 *Consumption Rate of Dairy Goods*

Looking into **dairy products,** yoghurt is the top item consumed by 81 per cent of all households, while milk and cheese are consumed by almost half of the households. The other half of the households cannot access cheese due to its' high prices. Fresh milk is consumed more frequently by ESSN households which may be related to higher number of children in these households. Overall; eggs, dairy products and chicken are the main protein sources of the households respectively.

Condiments and spices are the sixth consumption category. As they have a significant place in the food culture, spices and tea are the top two items in this category. Although consumption of coffee is very common, tea has a significantly high consumption rate. Cardamom appears as another item which has an important place among the dietary diversity of households.

Condiments and Spices	C-ESSN	ESSN	Non-recipient
Spices	71%	65%	64%
Tea	70%	69%	65%
Salt	65%	56%	58%
Coffee	52%	54%	56%
Cardamom	3%	15%	8%

Table 6 *Consumption Rate of Condiments and Spices*

Oil, fats and butter are key essentials in cooking. Sunflower oil appears to be the cheapest and top preferred type of oil, used by 77 per cent of households. On the other hand, olive oil is only consumed around 25 per cent because of its' very expensive price. Since the price of butter is also expensive, it is not commonly used in most households. Margarine and vita oil are also preferred by few households.

In the **sugar and sweets** category, granulated sugar is the most frequently consumed item, at an average rate of 79 per cent. Although less common, jam, molasses, hazelnut cream and honey are also consumed by 8 per cent of households.

Oils, Fats and Butter	C-ESSN	ESSN	Non-recipient
Sunflower Oil	83%	76%	72%
Olive Oil	20%	26%	29%
Butter	5%	18%	13%
Margarine Package	4%	20%	8%

Table 7 *Consumption Rate of Oil, Fats and Butter*

Sugar or Sweets	C-ESSN	ESSN	Non-recipient
Sugar	76%	83%	78%
Jam	13%	23%	16%
Molasses	7%	10%	7%
Honey	6%	6%	5%
Hazelnut Cream	5%	16%	8%

Table 8 *Consumption Rate of Sugars and Sweets*

Fruits are among the last two product category that households consume mainly because of budgetary reasons, as stated by households. Due to unexpected weather changes fruit yield and prices have been heavily affected this year and their consumption has also fallen. As a result, 75 per cent of households consume foods with apple being the most preferred item in the group. Watermelon, apricot, pears, cherries and plums are only consumed by 2 per cent of the households since they have been limited in availability or affordability.

Fruits	C-ESSN	ESSN	Non-recipient
Apple	55%	69%	63%
Orange	36%	46%	40%
Banana	21%	32%	24%
Lemon	13%	29%	21%
Strawberry	5%	18%	12%

Table 9 *Consumption Rate of Fruits*

Lastly, the **consumption of pulses** and legumes are the lowest among households, at 74 per cent. Some households indicated budgetary reasons for not consuming while some merely do not prefer to consume them. In the pulses group, red lentils are the most commonly consumed item, with over 50 per cent consumption rate. Beans and chickpeas also present with moderate consumption levels across all groups. Other legumes, such as nuts, peanuts, and kidney beans are rarely consumed possibly because of higher costs and cultural differences. Nuts are almost not consumed by any households, except from 1 per cent.

Pulses/Legumes	C-ESSN	ESSN	Non-recipient
Red Lentils	54%	61%	61%
Beans	46%	50%	49%
Chickpeas	45%	50%	51%
Green Lentils	33%	53%	46%

Table 10 *Consumption Rate of Pulses and Legumes*

Conclusion

The Market Assessment highlights the persistent challenges faced by both households and vendors under unstable market conditions. On the supply side, local and Syrian market vendors are grappling with inflation, supply constraints which leads to a contraction in both the diversity and quantity of goods sold, making them less competitive against chain markets. These constraints are particularly visible in Syrian markets, where smaller procurement capacity and shrinking customer bases result in reduces the resilience of small businesses to economic shocks. Voluntary returns had a slightly negative impact on Syrian markets however, the effect of this issue should be evaluated in the long term. Bazaars on the other hand provide seasonal relief and affordable fresh produce options. Only a few produce items saw an extreme price increase this year, yet the overall customer and supply base were consistent.

On the consumer side, rising economic hardship of the households raises concerns around long-term nutritional adequacy, narrowing dietary diversity and broader issue of food accessibility. While shopping locations are generally sufficient, chain supermarkets are more frequently preferred due to their cost-effectiveness. While cereals, bread, and rice remain dietary staples, households report limited access to protein-rich foods, with chicken and eggs forming the bulk of consumption and red meat largely inaccessible due to high prices. Dairy intake is moderate, but affordability constraints restrict variety, particularly in cheese and fresh milk for some household groups. Similarly, the consumption of pulses and vegetables, though relatively stable, lacks diversity, pointing to structural issues in affordability and availability.

Overall, findings suggest that persistent inflation, combined with declining variety in diets and reduced vendor capacity, continues to erode food security and market resilience. Strengthening vendor supply chains, stabilizing access to affordable protein sources, and supporting household purchasing power remain critical to safeguarding the nutritional well-being and dignity of vulnerable groups. Hence, future interventions must address not just affordability but also product diversity, supply chain resilience, and support mechanisms for small markets to create a more equitable and nutritionally adequate food environment.

Annex I

Item	Jun-25	1 M	3 M	1 Y
Rice	₺96	1%	7%	22%
Bulgur	₺39	1%	8%	25%
Bread	₺70	1%	2%	36%
Yoghurt	₺66	0%	-1%	14%
White Cheese	₺247	-1%	-1%	15%
Egg	₺6	-14%	-25%	66%
Sun-Flower Oil	₺116	1%	5%	30%
Tomato	₺51	-4%	-36%	24%
Cucumber	₺37	-4%	-36%	24%
Dry Bean	₺83	1%	7%	15%
Granulated Sugar	₺37	1%	6%	22%
Salt	₺29	2%	6%	24%
Tea	₺280	-1%	0%	38%
Total per day	**₺64**	**-1%**	**-3%**	**27%**
Total for month	**₺1,910**	**-1%**	**-3%**	**27%**

Figur 5 *Rate of Increasing Food Prices in a Year TURKSTAT*

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