

## In-Camp Electronic Voucher Programme in Turkey Market Price Monitoring (PMM) and On-Site Monitoring (OSM) Report Quarter 2: April – June 2020

### HIGHLIGHTS

- The average food basket cost in the contracted markets in camps is 160 TRY in June 2020.
- Lockdown due to pandemic deteriorated the purchasing power of the camp residents as they were unemployed.
- Purchase of hygiene items increased among the refugees; masks became an essential item of their expenditure.
- 30,000 WFP hygiene kits delivered to all camp residents in two rounds – April and June 2020.
- As a response to Covid-19 pandemic, WFP assisted the camp residents with 1000 TRY per household as a one-time only top-up in April 2020.
- The camp markets became the only source for shopping. They struggled to meet the demands particularly for fresh products in April, operated as usual in May or June.
- The migrants waiting at the European border were quarantined at the refugee camps due to pandemic, some decided to stay and registered in the camps.

#### Q2 Key Figures

**14** Contracted shops  
**69** Price Monitoring Activities

### Q2 2020 CONTEXT

- The Covid-19 outbreak peaked in Q2 2020 and camp managements complied with the nationwide regulations including curfews on the weekends and the restrictions for elderly and youth under 20.
- Camps took precautionary measures, reserved containers for possible quarantine cases,
- Ramadan (the month of fasting) was observed between April 24<sup>th</sup> –May 23<sup>rd</sup>, and the Eid al-Fitr was celebrated between May 24<sup>th</sup>- 26<sup>th</sup> 2020.
- WFP continued to collaborate with Turk Kizilay for contracted market price monitoring, and noncontracted market price data was collected by WFP staff through phones or online.

### OUTPUTS

Outputs – Q2 2020	April	May	June
Beneficiaries Reached	55,777	55,585	55,159
Total Value of Assistance (TRY)	17,225,700.00*	5,585,800.00	5,515,900.00



*WFP / Deniz Akkus*

\*This amount includes the one-time-only 1000 TRY cash assistance to 11,648 households across the camps as a response to the Covid-19 outbreak.

## REFUGEE CAMPS IN TURKEY – Q2 2020



### 1. OBJECTIVES

**Objective:** This report summarises all in-camp monitoring activities from April to June 2020. The market monitoring allows analysis of:

- 1) The performance of the partially restricted<sup>1</sup> e-voucher programme;
- 2) Key issues noted and resolved in shops during the reporting period;
- 3) Current price trends in WFP contracted and non-contracted shops comparing to previous periods.

Number of Shops Monitored – Q2 2020			
Month	Contracted shop	Non-contracted shop	Total
April 2020	13	9	22
May 2020	13	10	23
June 2020	13	11	24
<b>Total</b>	<b>39</b>	<b>30</b>	<b>69</b>

**Market Price Monitoring:** Every month, WFP/ TK (Turk Kizilay – Turkish Red Crescent) collect item prices from the e-voucher programme contracted shops,

<sup>1</sup> Since December 2019, WFP provides 100 TRY for each refugee at camps, with 80 TRY of it restricted for food and 20 TRY for non-food items. Previously, WFP used to provide 50 TRY food-restricted

and a similar number of non-contracted shops for comparison. This allows WFP and TK to monitor the programme closely, ensuring shops are honouring their contractual requirements, and that prices are following local trends.

**On-Site Monitoring:** On-site monitoring activities are conducted every month during the camp visits and provide information about the context in the camps and shops, tracking any developments and changes which are relevant to refugees and have a potential impact on the programme. This report summarises the findings of the shop visits, including issues noted by the field teams, and a price analysis of key commodities.

### 2. METHODOLOGY

WFP monitoring teams visit the camps unannounced every month, often during the week of the assistance upload. During their monitoring visits, WFP staff check the shops for:

- overall shop condition;
- availability of food items;
- quality of food items;
- prices of food items;
- issuance of itemized receipts to beneficiaries;
- shop staff practices/behavior towards beneficiaries;
- visibility of programme information material/posters;
- compliance with programme rules;
- programme awareness of shop employees;
- beneficiary feedback.

In Q2 2020, there were a total of 69 market monitoring activity conducted. When the WFP field activities were suspended due to Covid-19 since March 2020, close collaboration with Turk Kizilay (TK) enabled market price data collection from the contracted markets. WFP staff reached out to the non-contracted markets through phone calls or benefited from the websites of the non-contracted markets that offer online shopping. For OSM, the data was collected through phone calls.

assistance whereas DGMM covered the other 50 TRY for the non-food items. Currently, WFP is the only assistance provider of the e-Voucher programme in the camps.

The table above shows the number of contracted and non-contracted shops monitored during the reporting period. Many of the issues explained below are also raised in the Gaziantep Area Office reports and in WFP’s MEDS system, where programme issues are logged and tracked to ensure resolution.

### 3. PRICE MONITORING

Price monitoring activities help determine the average food basket cost in the camps. The standard food basket is comprised of specific commodities determined using the food consumption habits of the refugees, as explained in the Q1 2018 report. The food basket provides 2,100 kcal per person/day, in line with Sphere standards.

The food basket cost is monitored at four levels: The first is Turkish Statistical Institute (TurkStat) data at national level (grey line in Figure 1); the second is TurkStat data for only the South-east of Turkey (yellow line); the third relies on data collected by WFP and TK field monitors within the shops contracted (blue line) in camps where refugees redeem their e-vouchers; and the fourth is also data collected by WFP staff, but from non-contracted shops (orange line) within the camps and nearby, which serve as comparators for the in-camp contracted shops.<sup>2</sup>

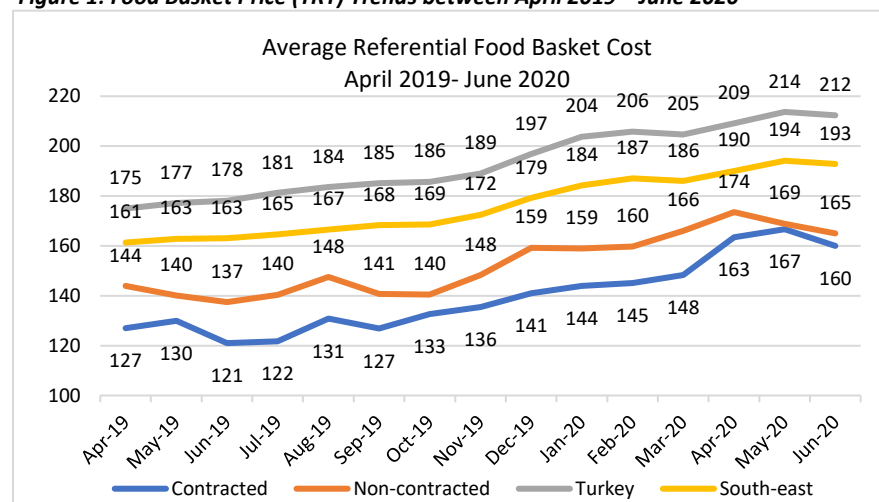
Monthly Food Basket		
Item	Quantity	Unit
Bread	7.5	kg
Rice	3	kg
Bulgur	1.5	kg
Beans	1.5	kg
Eggs	30	piece
Yoghurt	1.5	kg
White Cheese	1.5	kg
Tomatoes	0.9	kg
Cucumber	0.9	kg
Sunflower Oil	0.75	kg
Sugar	1.5	kg
Salt	0.15	kg
Tea	0.15	kg

The first confirmed case of Covid-19 in Turkey was on March 11<sup>th</sup>, and therefore the impact on the economy also delayed to Q2 2020. The food basket at national level was 209 TRY in April and 214 TRY in May

and went down to 212 TRY once the normalization started in June 2020 in addition to the warmer season effect on grocery costs.

The contracted and noncontracted markets show the same trends, yet the steep increase from March to April was a result of the estimation for item prices in March that were missing.<sup>3</sup> The food basket prices in contracted markets were 163 TRY in April, 167 TRY in May and 160 TRY in June 2020, which has been continuously cheaper than the noncontracted markets. In June, the food basket in contracted markets cost 5 TRY less compared to the noncontracted markets (165 TRY).

Figure 1: Food Basket Price (TRY) Trends between April 2019 – June 2020



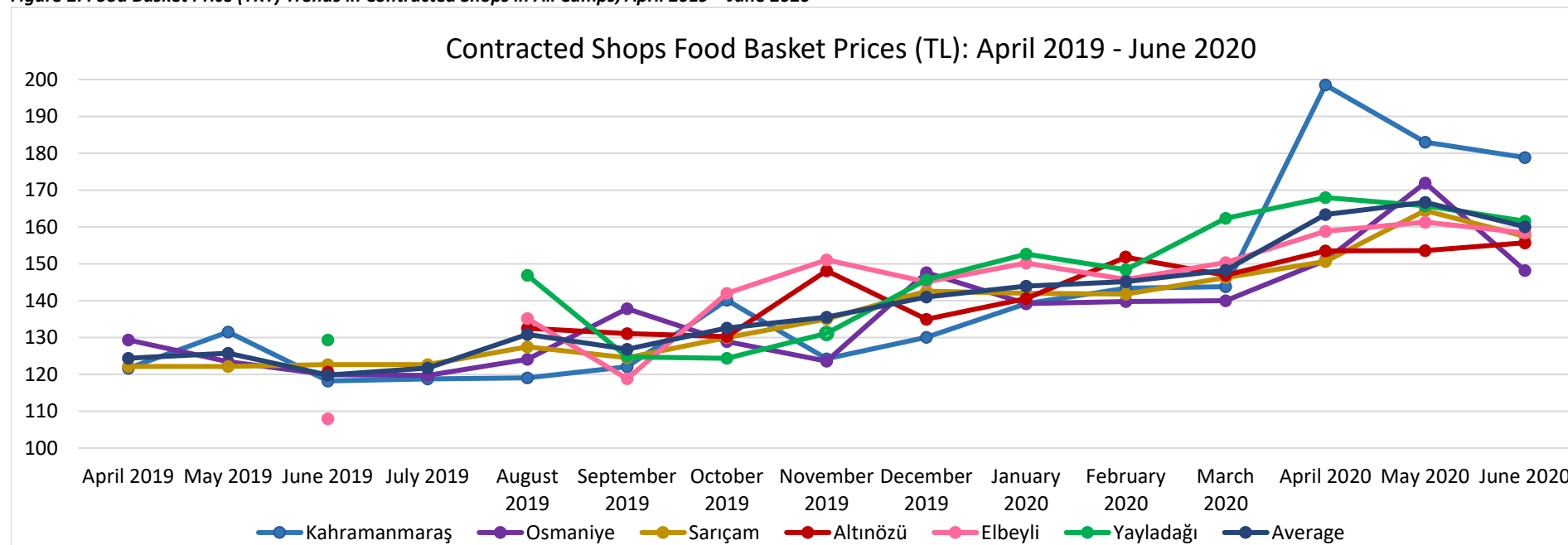
<sup>2</sup> TurkStat data is collected for higher quality products/brands, reflecting Turkish preferences: [http://www.turkstat.gov.tr/PreTablo.do?alt\\_id=1014#](http://www.turkstat.gov.tr/PreTablo.do?alt_id=1014#). WFP price data is collected for the commodities selected by refugees - usually the cheapest brands available.

<sup>3</sup> For instance, the Ceylon tea prices were replaced with available Turkish tea prices from noncontracted markets, or bean prices which happens to be cheapest yet may or may not be complying with the food safety standards.

The food basket cost in the contracted shops over the last 12 months is shown in **Figure 2**. Except for Osmaniye and Kahramanmaraş, the price range in the other camps were between 156 TRY and 162 TRY. In Kahramanmaraş, the type of rice, egg, and cheese that were regularly monitored were out of stock during the

monitoring activity in April. Bean and cheese prices in May and June were the driving factors for the higher prices in Kahramanmaraş in May and June. Similarly, in May the prices for eggs, tea and cheese in Osmaniye resulted in higher food basket cost compared to the other months.

**Figure 2: Food Basket Price (TRY) Trends in Contracted Shops in All Camps, April 2019 – June 2020**



#### 4. ON-SITE MONITORING

##### Administrative/ management issues

##### Covid-19 Regulations

Starting from April 2020, the camps announced curfew at camps. In line with the Government's regulations, people above 65 years old and youth under 20 were not allowed to go out of their containers. Residents were restricted from the camp streets except for going to the market – only one person per household were allowed. The shopping needs of the elderly-only households were covered by the camp management and the TRC staff. In Kilis, camp management particularly set

up a *Vefa Support Group* to assist the people with special needs with their shopping and other needs.

Camps implemented different measures for getting in and going out of the camps. In April, while the residents were not able to leave Kahramanmaraş camp, in Kilis people were able to go out of the camp for work or for hospital and expected to return by 5 PM. In Osmaniye, only one person per household was allowed to go out of the camp for work. In May Kahramanmaraş also eased the camp entry and exits except for people with chronic diseases. In all camps, staff continue to check body temperature at gates.

The public areas (health centre, playground, mosque etc.) in the camps were disinfected periodically. In Kahramanmaraş the hospital was provided with an additional washing machine for the staff uniforms as they were not allowed to leave the camps with their work clothes. In April, a specialist of infectious diseases visited the Kahramanmaraş camp to provide guidelines to the staff on Covid-19. He also checked the capacity and general situation of the hospital. In Kilis the province level Ministry of Health staff trained all 48 hospital staff members on Covid-19, and the staff prepared banners and brochures to inform the camp residents.

In May, a staff in Kahramanmaraş camp was diagnosed with Covid-19 and around 20 camp management staff were sent home for 14-day quarantine. Kilis camp management purchased 350 special protected clothes for the camp staff and others to be used when needed.

Each camp designated one of the neighbourhoods for quarantine purposes and furnished the containers. Even though there were some containers in need of repair, the ones in good conditions were enough for the quarantined. The camp residents who showed Covid-19 symptoms or visited Covid-19 infected departments in the hospitals stayed in these containers with their family members for 14 days and were allowed to bring their belongings from their own containers. The camp staff bought the food needs of the people in quarantine by using their e-cards and delivered in front of the containers to be picked up by the household.

#### *Border returnees*

After Covid-19 outbreak, the immigrants who had been waiting at the European borders<sup>4</sup> were taken into the refugee camps after staying in quarantine in cities. In Kahramanmaraş, there were around 265 migrants from various nationalities arrived in three rounds. Upon DGMM's request, WFP provided them with 150 BIM cards (100 TRY per person) and the rest were covered by the management. Yet, the camp management started to provide hot meals to all of them as they used up the money to buy basic needs to settle in the camp. While many left in May and

June, 54 Eritreans registered to reside in the camp. The Kilis camp hosted 110 returnees for their quarantine period until they left in June.

#### *E-card related developments*

As the refugees were not permitted to leave the camps, to solve the pin code issues Halkbank provided POS machines to Turk Kizilay staff to unblock the e-cards as best practice. In April, Temporary Protection IDs of 7 families in Kilis camp were blocked due to update requirements and the families were not able to receive assistance. The camp management provided them with food baskets.

The camp markets reported that since the refugees do not know their balances and calling the hotline is inconvenient, they end up at the cashier without enough money in their cards. This results in returning/cancelling items at the cashier, which increases the workload of the cashiers and causes long lines and crowds.

#### *Water supply*

In Osmaniye some refugees mentioned that the water supply was not enough, especially with the increased need for cleaning due to the pandemic. One woman said that her household already reached the quota in 20 days and she had to get water from her mother's container for 10 days before the credit was uploaded next month.

#### *Distance education*

A special satellite was set up in Kahramanmaraş camp for TV connection so the students in the camp could follow the classes on EBA TV channel where teachers of Ministry of Education give courses for each grade.

However, the residents mentioned that the children need internet to receive and submit their assignments, and none of the camps provide internet yet. The refugees stated that they had to buy internet packages, which was hard to afford as an additional expenditure especially when they cannot generate income.

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<sup>4</sup> In February Turkey announced that they will not stop migrants at the borders who are going to Europe, yet many remained at the borders as they were not accepted by the other side of the borders.

In May, to assist with education, Turk Kizilay donated 4626 books in Arabic and Turkish to Kahramanmaraş camp for children over 8 years old.

#### *Donation regulations*

The camp managements will be using the Portable Recording System to record the donations and assistances to all refugees in the camps. The staff in the camps were trained to use the system in May and June. The system is already activated in June in Kilis camp.

#### *In-kind assistance*

In April IHH Humanitarian Relief Foundation delivered 115 food baskets, and Safa Vakfi donated 100 food baskets to the most vulnerable in the Kahramanmaraş camp. Turk Kizilay donated 600 packages of pickles, 500 packages of halva, 5520 eggs and 350 small food baskets. Also 1000 bottles of 5 LT sunflower oil, and 1000 food baskets were provided by unknown benefactors.

Turk Kizilay provided some non-food items as well. In Kahramanmaraş, 343 sets of children pyjamas, 200 sets of adult pyjamas, 1000 sweat suits, 3000 pairs of socks and 45 sets of diapers /disposable pads. In Kilis, 15 families were provided with both food and hygiene kits as well as baby and patient diapers for the families in need.

### **Covid-19 Relief Response**

#### *WFP Cash Intervention*

In April, WFP provided 1000 TRY per household in the camps. The refugees were very happy and thankful; one refugee said that his prayers for help became true, and another one said it was like medicine for a patient about to die.

Despite the announcements and messages, the residents could not believe it and visited the management and Turk Kizilay staff to double check. Some refugees remained unclear and attempted to use up all the money on durable goods assuming the left balance would swept back. Some refugees were also confused about the regular upload date when they received the Covid-19 payment.

Market managements suggested that such large payment could have been done in two instalments would reduce the crowdedness in the markets and to provide supplies efficiently.

#### *Hygiene assistance*

Refugees reported that their hygiene expenditure increased due to Covid-19. In Kilis camp, wet wipes became one the most purchased item in the markets since the outbreak. In April, masks became an additional expenditure for the people as it is mandatory to wear them in the markets.



WFP / Mehmet Cemtas

In April, Turk Kizilay delivered hygiene kits across camps; in Kahramanmaraş camp, aside from the 400 hygiene kits, 1530 hygiene kits for children and 540 kits for adults were provided.

WFP delivered a total of 30,000 hygiene kits to all the camps in two rounds; 28-30 April and 14-17 June. The kits were delivered by door to door method and camp staff members accompanied the WFP staff. Some additional kits were left with management in case of further need. The refugees were informed through SMS. The camp management and TRC staff were in close coordination to report cases of missing items in the kits to WFP.

### **Shop regulations, conditions and maintenance**

The contracts with markets that expired in May were renewed for the next quarter and the markets operate as usual.

It is mandatory to wear a mask in the markets and the markets are disinfected regularly. The camp markets limited the number of beneficiaries within the shops and implement social distancing by putting black lines per meter for people to wait on the queues. Even though the cashiers were working full capacity, there were long lines; some people went to market at 4 AM to get in line so that they can do their shopping by 10 AM. In June, TK staff in Kilis camp requested the market management to increase the number of the cashiers and reduce the number of shoppers permitted in the market to avoid crowding as the residents failed to comply with the social distance regulations and wearing masks.

In April 13 mukhtars signed a petition in Kahramanmaraş and delivered to Turk Kizilay for poor quality of bread in the market, insufficiency of stocking during the pandemic, absence of greenery such as parsley, mint and lettuce, low quantity of fruits, poor quality of meat and chicken, as well as negative attitudes of the market staff. Turk Kizilay delivered a warning letter to the market. The camp management brought experts from the Ministry of Food, Agriculture and Livestock to examine the bread quality in Kahramanmaraş, and no problem was observed.

The camp markets had fans for sale in May as the weather got hotter and they were sold out in just one day. Thanks to WFP's 1000 TRY assistance, the refugees were able to afford the 120 TRY cost.

### **Availability of food items**

Camp refugees used to buy their grocery from the bazaars before the pandemic outbreak. Since the lockdown started, beneficiaries were only able to do their shopping from the camp markets, therefore demand for vegetable and fruits increased. Markets struggled to provide enough vegetables and fruits in the first few days but managed to deliver trucks of fresh products. In May the camp markets increased the variety; people in Kilis expressed their happiness and lined up to buy parsley and mint.

The increase of cash spent in markets from 40,000-50,000 TRY to 400,000 TRY in March reflects the shift in beneficiary shopping behaviours from off-camp towards the camp market. In April, the market staff reported that they cannot foresee the needs of people in terms of quantity and range despite their long-time experience. In addition to the Ramadan preparation, with the 1000 TRY uploaded as assistance due to pandemic, the beneficiaries were inclined to buy durable items in bulks; in Kahramanmaraş, some refugees bought 13 bottles of oils. In Kilis, market staff reported that the flour purchases increased by 200% as residents tend to make bread at home in case of curfew expansion.

Aside from the confusion for the deadline of using the assistance money, refugees stated that they bought in bulks because they worry about virus infection if they have frequent visits to market, do not want to do shopping when fasting during Ramadan, and are worried about the stocks in the market not being enough.

The market managements said that due to the high demand to the markets after closure of bazaars across provinces, they do not receive their orders fully either. In Kahramanmaraş the market manager said that they ordered 1500 chicken yet received only 900 in April. None of the markets had any stock or supply issues in May or June 2020.

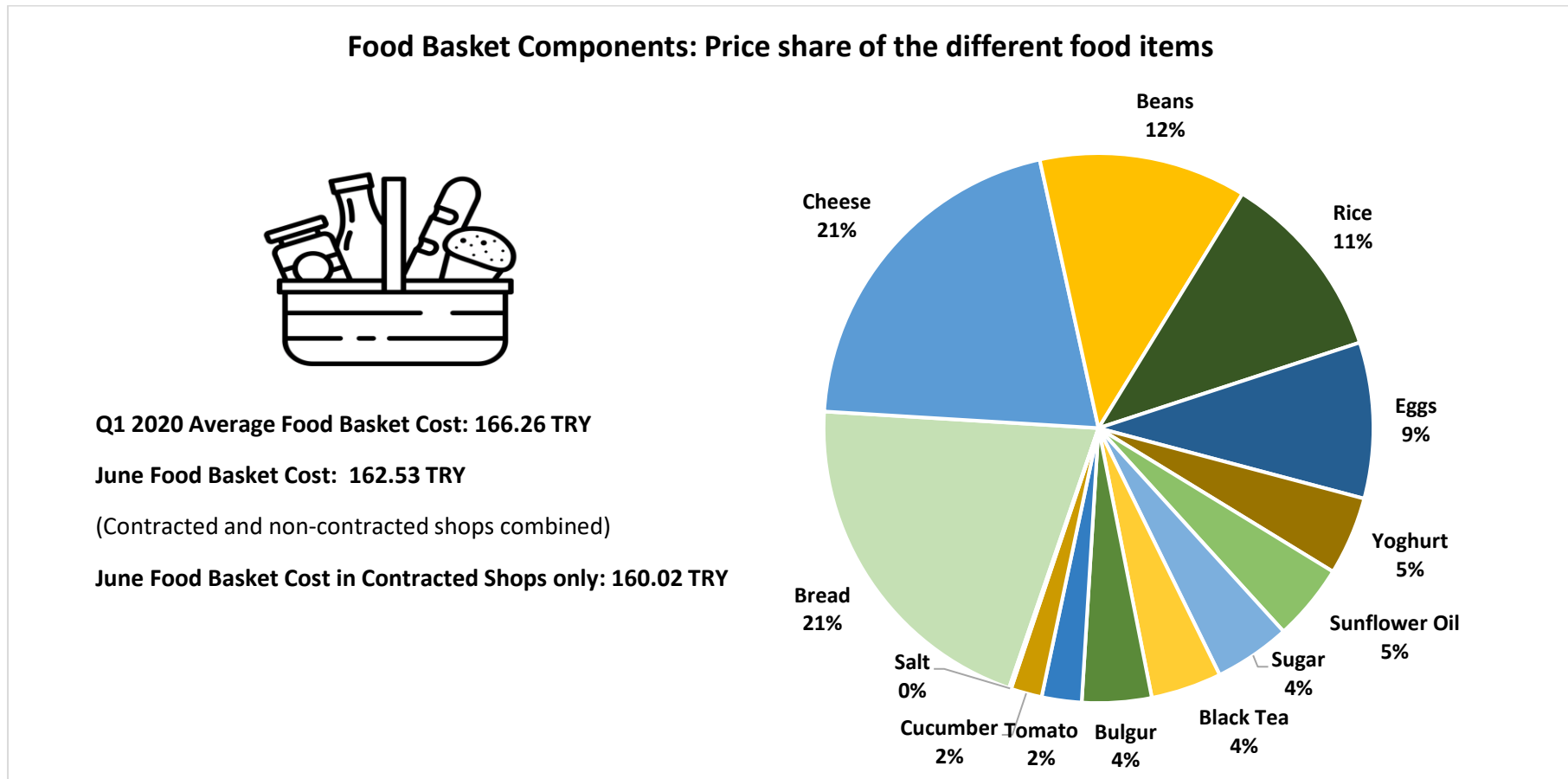
### **Purchasing power**

The refugees were left unemployed during the pandemic due to closure of businesses and curfews implemented in the camps. In April, only few people in Kahramanmaraş camp were able to work for bread delivery in the shop outside of the camp. The elderly said that their children cannot assist them anymore as they have difficulty meeting the needs of their own households. In Osmaniye, some residents said that they plan to sell their phones to buy food for Ramadan preparation as they cannot work. In May, Kilis camp management allowed the agriculture workers to go outside, yet, they were required to return by 1 PM. In Kahramanmaraş, the camp manager said that only 1500 residents have jobs in agricultural work, the number was more than twice before the pandemic. In Kilis, it was reported that to generate cash, the refugees were selling the items they bought from the market with e-cards to the small shops inside the camp for a cheaper price.

## ANNEX 1: WFP REFERENTIAL FOOD BASKET COMMODITY PRICES, Q2 2020

The food basket is designed to be nutritionally balanced, corresponding with the consumption habits of the refugees in Turkey, and for the most affordable cost possible. As the most consumed item, bread has the highest cost share (21%) closely followed by the cheese prices in Q2 2020. The share of beans is 12%. The share of rice and eggs are 11% and 9% respectively. The five top items in the shares reflects a dietary diversity.

Figure 3: Percentages of Food Basket Components and Total Food Basket Cost

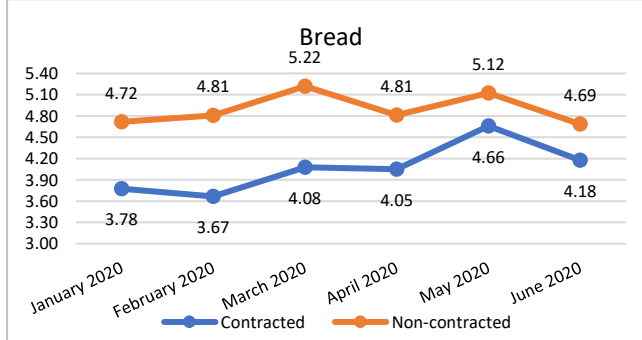
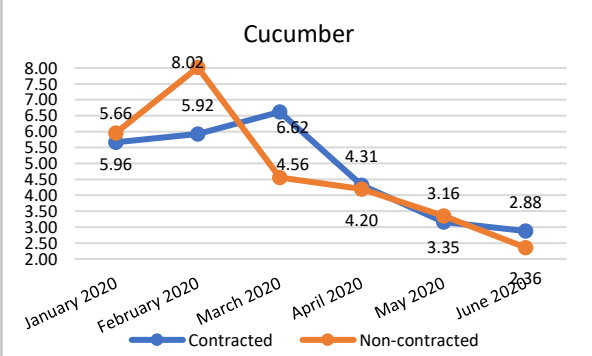
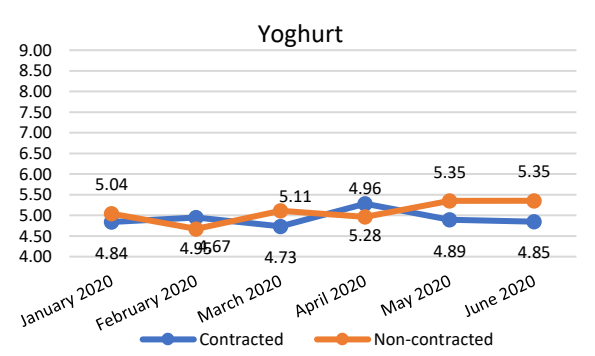
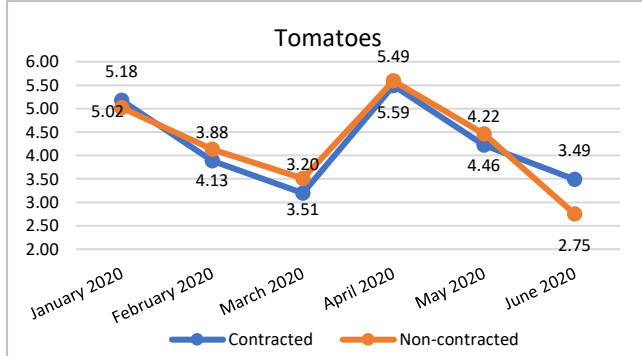
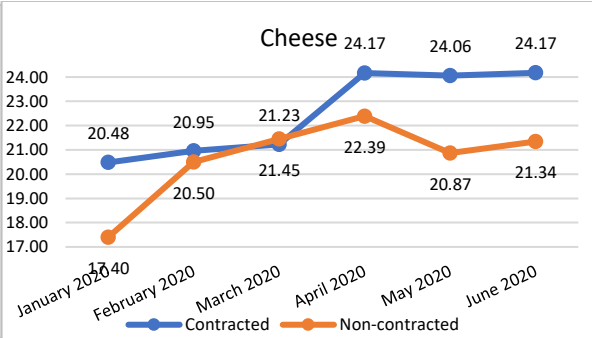
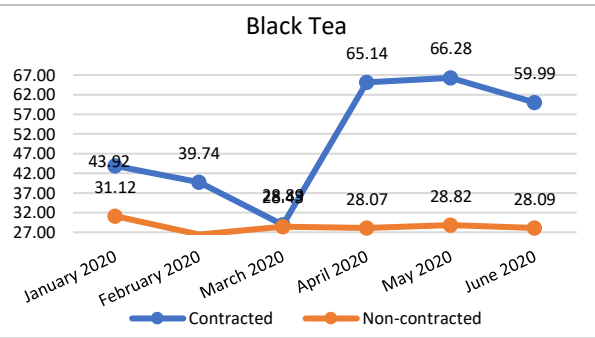
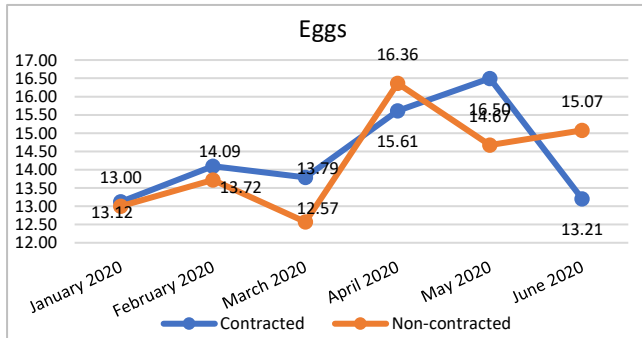




Below are the price trends for each item in the food basket since the beginning of 2020. Following the concerns over panic buying and using up the food stocks due to Covid-19 outbreak, some price fluctuation in both contracted and noncontracted markets is observed in Q2 2020. The bean, cheese and tea prices indicated a particularly increasing trend in the contracted markets, aside of the brand and type differences that were available during the monitoring activities. Despite the decrease in vegetable prices towards summer, the tomato and cucumber costs were slightly more expensive in contracted markets than the noncontracted markets.

**Figure 4: Divergent price trends (TRY/Kg) for WFP Referential Food Basket items in contracted and non-contracted shops**





#### For More Information

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