



In-camp Post Distribution Monitoring Report

Turkiye Q1/2025

Introduction

Turkiye hosts approximately 3 million refugees, with the majority being Syrians displaced by more than a decade of conflict. Around 2 percent of this population resides in five camps located in southeastern Türkiye, managed by the Presidency of Migration Management. The Turkish government provides each household with containers, and basic household supplies, such as electrical stoves and utensils.

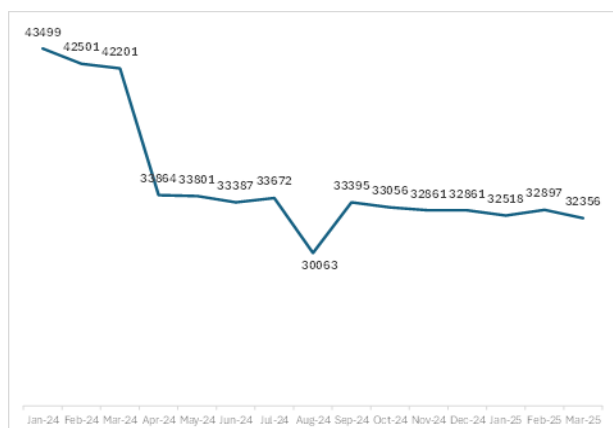
As of March 2025, the World Food Programme (WFP) partners with the Turkish Red Crescent (Türk Kızılay) to deliver e-voucher assistance to 32,356 refugees living in the camps, through the Kızılaykart system. Each card is loaded with TRY 425 per person per month, increased from TRY 300 as of January 2025, primarily to cover food needs.

However, the high inflation rates (38% in March 2025) continue to diminish purchasing power in Türkiye, and particularly affecting vulnerable groups. In the camps the e-voucher programme is implemented, despite the increase in the adequacy ratio from 24 percent in December to 34 percent in January with the increase in transfer value, it dropped to 31 percent in March 2025 as the food basket cost reached TRY 1,382 per person per month.

Highlights

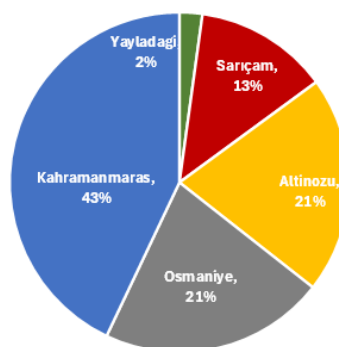
- Economic factors continue to be the main drivers of food insecurity, with 41 percent of households classified as food insecure and an additional 57 percent vulnerable to food insecurity, indicating the persistent challenges in meeting basic nutritional needs.
- Female-headed households are particularly vulnerable, with 53 percent reporting food insecurity compared to 38 percent of male-headed households, and they allocate a higher percentage (77%) of their budget to food expenses, reflecting their increased financial strain.
- Vulnerability in households with disabled members is also a concern with higher food insecurity (50%), fewer households with acceptable food consumption (81%), higher use of consumption coping strategies (97%), and limited access to livelihood coping strategies.
- Food consumption scores decreased from 95 percent to 93 percent, with more female-headed households falling to the borderline, and the emergence of poor food consumption among male-headed households.
- A significant number of households (90%) are now using consumption coping strategies, with 86 percent opting for cheaper, less preferred food to cope with the rising cost of living. Despite the decrease in the intensity of using these strategies within households, resorting to such coping behaviours became more prevalent across camps.
- While three quarter of the households (74%) rely on wage labour as their primary income source, 83 percent still depend on e-voucher assistance as their secondary income, underlining the continued importance of external support in meeting food needs amid economic challenges.
- A significant 59 percent of households report worsening financial conditions, primarily due to rising inflation, which has severely reduced purchasing power. Aside from the increase in the use of coping strategies, almost all households who borrowed money to cover their essential needs spent it on food.
- 81 percent of households reported being fully informed about entitlements and criteria, which is a notable increase from 58 percent since Q1 2024. In addition, 100 percent reported respectful treatment at WFP sites. Findings reflect progress in service delivery and beneficiary relations.

Caseload over time



* PMM OSM AAP Report, Q1 2025.

Percent distribution of surveyed beneficiaries by camps



Objectives and Methodology

Post Distribution Monitoring (PDM) activities aim to evaluate how effectively refugees living in camps are able to meet their basic needs through the in-camp e-voucher programme. These activities also track changes over time and assess the programme’s impact on households to ensure smooth implementation. The World Food Programme (WFP) publishes the in-camp PDM report for Syrian-populated camps twice a year—once in the first quarter and again in the third quarter.

The surveys collect data on household food consumption, dietary diversity, coping strategies, and spending habits. This information is used to evaluate overall household well-being and guide evidence-based programme improvements. PDM surveys follow a cross-sectional design and use a single-stage

random sampling method to select households receiving e-voucher assistance in the Syrian refugee camps supported by WFP.

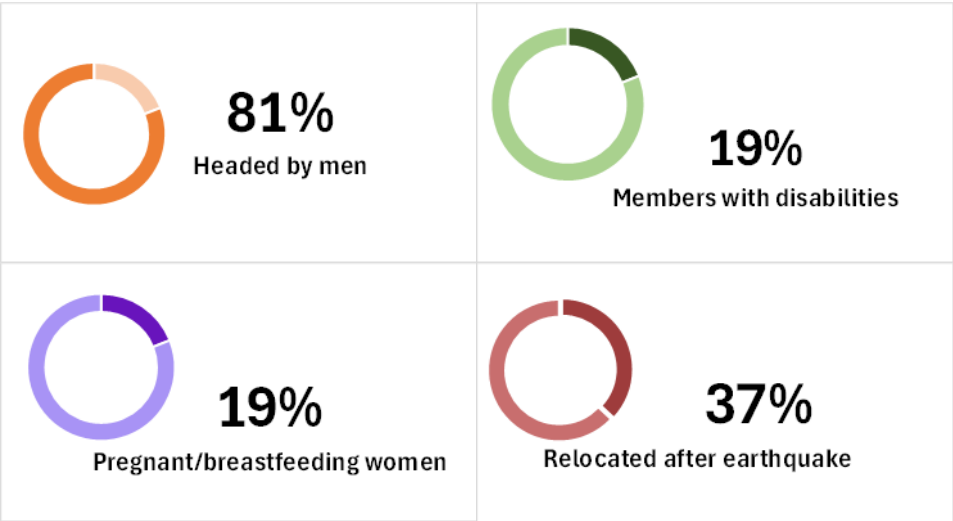
The Q1 2025 PDM report is based on data collected between February and March 2025. WFP Field Monitoring Assistants conducted in-person interviews with 368 beneficiary households across the five Syrian-populated refugee camps where the e-voucher programme operates. The sample size was determined based on the total camp population and distributed proportionally across the camps, ensuring the results are representative of the entire in-camp refugee population, though not statistically representative at the individual camp level.

Demographic Profile

- An overwhelming majority of the households (81%) were male-headed, while female-headed households made 19 percent,
- The average household size is 4.81.
- 19 percent of the households had at least one pregnant or breastfeeding woman.
- 19 percent of the households had at least one disabled member.
- 39 percent of the households had at least one child under the age of 5.
- 37 percent of the households were relocated into the camps after the 2023 earthquakes.

Household Size

Average household size is 4.8. Majority (53%) of the households are composed of 5-9 people, while smaller households (1-4 members) make up 45 percent of the households participated in the PDM surveys.



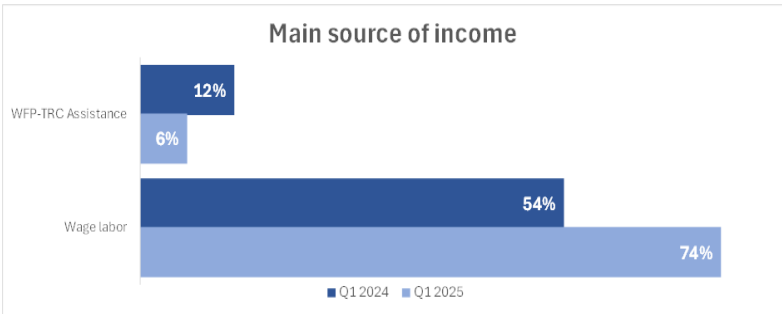
* Female-headed households refer to the self-declaration of the household when asked the gender of the head of the household.

Socioeconomic Characteristics

Main Source of Income:

In 2024, wage labour had emerged for the first time as the primary source of income for camp beneficiaries, marking a significant shift in income trends in the camps. This pattern has continued into 2025, with a growing number of households relying on wage labour. By the first quarter of 2025, approximately 74 percent of households reported wage labour as their main income source, up from 54 percent in the same period in 2024. Of those engaged in wage labour, the majority (50%) reported income from unskilled non-agricultural work. An additional 16 percent relied on unskilled agricultural labour, while only 8 percent of households reported income from skilled wage labour.

The households whose primary income comes from labour* tend to have better overall stability, with 64 percent being food secure, of being medium household size (62%), with male (87%) head of houses who are married (90%), and with at least middle school degree (57%). However, the predominantly informal nature of labour work suggests that many households are using employment as a coping strategy. This informality exposes workers to increased risks, including low wages, unsafe working conditions, and limited protection of labour rights typically ensured under formal employment.



Secondary Source of Income: Even though income from labour is becoming the primary source, 83 percent of households still report e-voucher as their second source of income. This represents an increase from 75 percent in Q1 2024, highlighting that, amid declining purchasing power, e-voucher assistance remains a crucial resource for beneficiaries to meet their food needs.

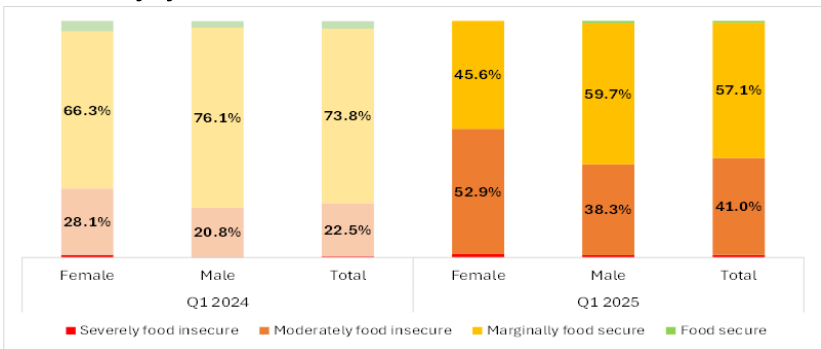
Women's Contribution to Household Income: In 90 percent of households, women do not contribute to the household income. However, in 6 percent of refugee households, women are the sole breadwinners. Women's participation in the labor force is even lower in households with members who have disabilities or with children under the age of five—likely due to caregiving responsibilities. Smaller households (4 or less members) tend to have higher female labour participation, possibly due to having fewer male members who would be able to work.

Debts: 31 percent of the households report having debts, almost unchanged compared to a year ago (33%), indicating a financial burden within the community. An overwhelming majority (93%) of households who have debt stated that they borrowed money to buy food. Other reasons to borrow money are also essential needs such as to cover health and education expenses and essential non-food items. While there is no gender disparity, male-headed households tend to borrow higher amounts compared to female-headed households.

Food Security

Levels of Food Insecurity: Food insecurity among households increased significantly from 23 percent in Q1 2024. Additionally, the percentage of food-secure households almost disappeared with a decrease from 3 percent to less than 1 percent, while those classified as marginally food-secure dropped sharply from 74 percent to 57 percent.

Food Security by Gender



The findings indicate that many households in the camp are at risk of vulnerability and continue to face challenges in meeting their nutritional needs, despite the ongoing monthly support from the e-voucher assistance program and efforts to generate income.

* This category includes households that earn income through wage labor, as well as a small number engaged in petty trade or working as street vendors.

Disparities in Food Security

Gender Disparity: Although female-headed households have historically been more vulnerable to food insecurity, the gap between male- and female-headed households has widened further: 53 percent of female-headed households are now food insecure, compared to 38 percent of male-headed households, while the figures were 28 percent for female-headed households and 21 percent for male-headed households in Q1 2024. Female-headed households tend to be smaller, averaging 3.9 members compared to 5 in male-headed households, and often have fewer working-age adults (1.7 people on average compared to 2.3 in male-headed households), which limits the access of female-headed households to income generation and makes it difficult to meet their basic needs.

Disability: Half of the disabled households (50%) are food insecure. The figure has increased from around 23 percent in Q1 2024. Even though food security was worsened for all types of households compared to a year ago, the households with disabled members experienced a higher decrease, indicating additional obstacles they experience increasing their vulnerability.

Factors Influencing Food Security

Economic Conditions: Families with more than one source of income face a lower risk of food insecurity. Whereas 60 percent of single-income households struggle with food access, this figure falls to 40 percent among those households that have two income sources. These results highlight the vital importance of income diversification in mitigating food insecurity. Moreover, households that primarily earn their income through labour are less likely to experience food insecurity (36%) compared to those whose main source of income is e-vouchers (65%) or those who depend on external support such as remittances, gifts, or other forms of assistance (60%) as their main income.

Food Consumption and Expenditures

Food Consumption

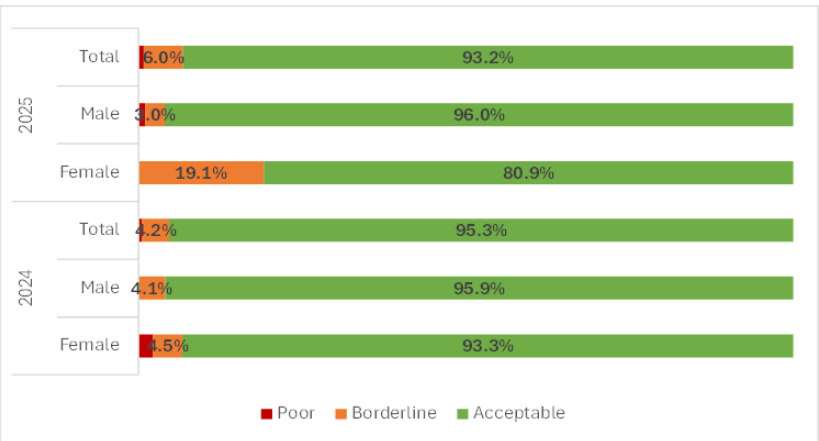
Acceptable Food Consumption: The overall acceptable food consumption score declined from 95 percent in Q1 2024 to 93 percent in Q1 2025. Aside from the borderline consumption scores, the poor consumption score also slightly increased.

Gender disparity: The decrease in acceptable food consumption was observed in the female-headed households with a drop from 93 percent to 81 percent between Q1 2024 and Q1 2025, while it remained unchanged in the male-headed households (96%). The Q1 2025 data revealed that almost one-fifth of the female-headed households (19%) have borderline food consumption, which sharply increased from 5 percent compared to a year ago. This highlights a growing concern over vulnerability among female-headed households and underscores the need for targeted interventions to prevent further deterioration in their food consumption status.

Impact of disability: The households with disabled members experienced more deterioration in their food intake, despite spending a larger share in the household budget on food. 81 percent of the households with disabled have acceptable food score compared to 96 percent of those do not have disabled members.

Household composition: Households with 4 or fewer members are more likely to have poorer food consumption compared to those with a higher number of members, who have fewer members to contribute to the household income. Households with children report higher food consumption levels. This may indicate that these households place greater importance on ensuring adequate food intake for all members.

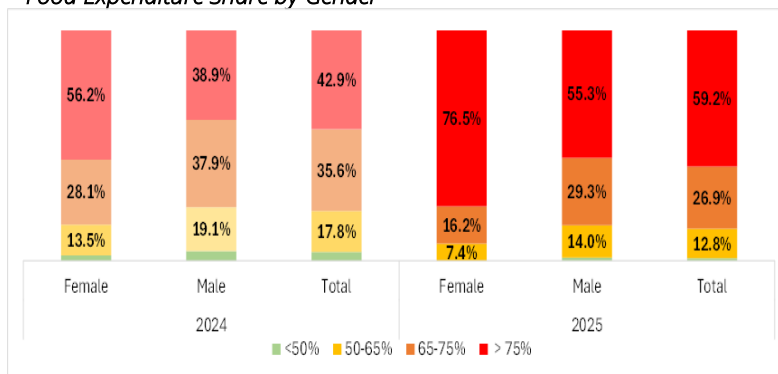
Food Consumption Score by Gender



Expenditure on Food

Budget allocation: As of Q1 2025, 59 percent of households allocate more than 75 percent of their budget to food—an increase from 43 percent in Q1 2024. Despite a rise in income-generating activities that would be expected to decrease the percentage of budget allocated for food, high inflation continues to push food expenditure to the forefront of household budgets. Notably, even in contracted markets—considered the most affordable—the cost of the food basket rose by 41 percent between March 2024 and March 2025, making it increasingly difficult for households to afford their food expenses. Even among the households whose primary income is labor that are expected to have relatively higher household income, 50 percent allocate more than 75 percent of their budget to food expenses. Among those whose primary income is e-voucher, those who spend three-third of their budget on food makes up 83 percent.

Food Expenditure Share by Gender



Gender disparity: Female-headed households are disproportionately affected, with 77 percent of them spending more than 75 percent of their budget on food. While a significant majority of male-headed households (55%) also spend three-fourths of their budget on food, the burden is greater for female-headed households amidst the widespread strain of rising food costs.

Impact of disability: More households with disabled members allocate a greater share of their budget for food (66%) compared to those without (58%). The households where at least one disabled member is present have lesser income than others, which restricts budget allocations. Food takes the highest share of their budget, while possibly comprising from other expenses.

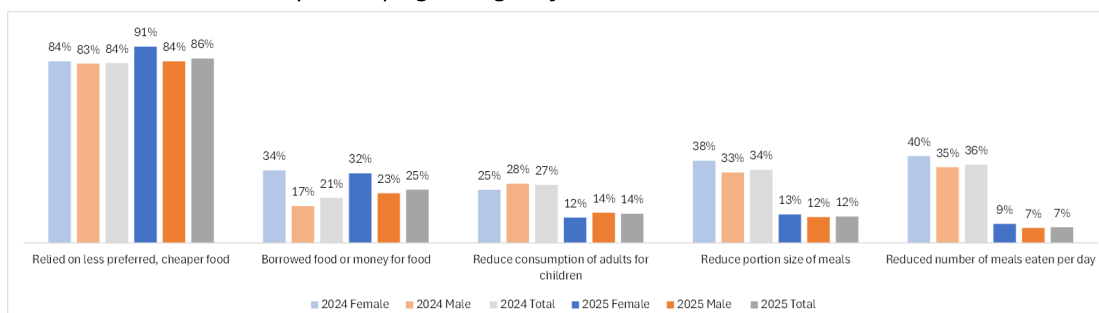
Coping Strategies

Consumption Coping Strategies

High Utilization: An overwhelming majority (90%) of beneficiary households rely on at least one type of consumption coping strategy, a 6 percent increase since Q1 2024. This rise indicates a worsening situation regarding food security that almost all households seek ways to meet their need by comprising their households' food consumption at different frequencies and severity levels.

Preference for Cheaper Food: The continued reliance on less preferred, lower-cost food items remains the most commonly reported coping strategy among refugee households, consistent with trends observed in previous reporting periods. As of Q1 2025, 86 percent of households indicated they consume cheaper, less desirable food—reflecting a slight increase of two percentage points compared to the same period last year. This persistent resort to cheaper food raises ongoing concerns about the nutritional well-being of camp residents, who are challenged by high food prices. Those who reported borrowing food or money to buy food increased from 21 percent to 25 percent between Q1 2024 and Q1 2025. Meanwhile, a decline in the use of other coping strategies has been noted, though, these are particular strategies—such as reducing the number of meals per day or reducing portion sizes—that may have reached their practical limits after prolonged use.

Consumption Coping Strategies by Gender



Gender Disparity: More female-headed households (96%) are inclined to use coping strategies compared to male-headed households (89%). Also, borrowing food is more common among female-headed households (32%) than in male-headed households (23%), though, there is a 5 percent increase in the number of male-headed households who borrowed food/money for food compared to a year ago.

Impact of Disability: More households with disabled members (97%) than without (88%) use consumption coping strategies. While relying on the less preferred food is the most common practice in both types of households, the ratio of those who borrow food or money for food is two times more among households with disabled members than those who are not, and reducing the number of meals is three times more in these households than without. This suggests that the greater socioeconomic burden associated with disabilities contributes to a more prevalent use of consumption coping strategies.

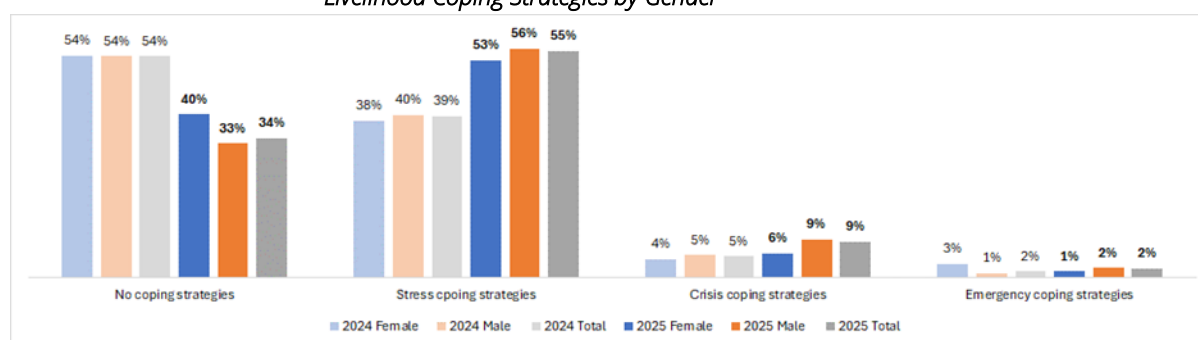
Livelihood Coping Strategies

Long-term Coping Behaviours: In Q1 2025, two out of three households (66%) reported using coping strategies that affect their livelihoods, which significantly increased from 46 percent a year ago. Despite the increase in generating income, households seek ways to meet their needs by resorting to activities that harm the long term. In this reporting period, those who use stress coping strategies increased from 39 percent to 55 percent compared to a year ago, indicating the worsening situation for those who did not need to use livelihood coping strategies. The proportion of households who resort to crisis coping strategies increased from 5 percent to 9 percent, reflecting that some households experience deterioration in their conditions to a level that they make a concession from their essential needs such as education and health, or sell productive assets.

Gender Disparity: Overall, both female-headed and male-headed households have experienced a significant increase in the use of livelihood coping strategies. While a slightly smaller proportion of female-headed households rely on strategies that undermine their livelihoods, it is important to note that, when asked about each strategy, female-headed households often report a lack of access to such options. This highlights the additional barriers and further limitations these households face in meeting their needs.

Impact of Disability: While the use of coping strategies has become more prevalent among camp beneficiaries, households with disabled members (57%) tend to rely on these strategies less than households without disabled members (68%). Similar to female-headed households, access to such strategies is more pronounced among households with disabled members, particularly in terms of owning assets to sell or having savings to draw from. A significant number of these households report having already exhausted these strategies to the point where they are no longer sustainable.

Livelihood Coping Strategies by Gender



Accountability to Affected Populations

Respectful Treatment and Dignified Conditions

In the first quarter of 2025, all respondent households reported being treated with respect by WFP and partner staff, as well as experiencing dignified conditions at WFP sites. These findings highlight the ongoing efforts to improve accountability and service delivery, enhancing both the beneficiary experience and the professionalism of staff.

Programme Awareness and Transparency

Thanks to the ongoing efforts, the proportion of households fully informed about entitlements, selection criteria, how to report misconduct, and finding shared information easy to understand significantly increased from 58 percent in Q1 2024 to 81 percent in Q1 2025. However, this figure remains slightly lower among male-headed households (78%) compared to female-headed households (84%), as some male respondents remain unclear about the targeting criteria applied by PMM, and others are not fully aware of how to report misconduct if they witness it.

Access Challenges

Almost all beneficiaries reported that they do not have any problem accessing the assistance.

Economic Empowerment

The proportion of beneficiary households that reported their financial situation improved for male-headed households remained the same between Q1 2024 and Q1 2025 (5.7%), whereas no female-headed households reported improvement at all. The figure for female-headed households was 4.6 percent a year ago. Moreover, more than half the beneficiary households (53%) reported that their financial situation worsened compared to a year ago. The most cited reason for this decline was the decrease in purchasing power due to high inflation. For those households who experienced improvement, finding employment is stated as the primary reason. Those who arrived in the camp after the earthquake also stated that the decrease in expenses (such as rent and utilities) also contributed positively to their households' financial situation.

Decision-Making Dynamics

Within two-thirds of households (69%), both women and men now make joint decisions on how to utilize the e-voucher assistance, marking a significant increase from 37 percent in Q1 2024. In 22 percent of the households, women continue to be primarily responsible for deciding how to utilize the assistance provided, while in 8 percent of the households, men make the decisions independently. The households indicate a positive movement towards more inclusive and equitable financial decision-making within families.

Conclusion

The data from the first quarter of 2025 reveals a complex and evolving landscape of challenges faced by camp beneficiaries. The findings show that a significant proportion of households experience heightened vulnerabilities. Shifts in income sources towards wage labour emerging as the main contributor demonstrate the efforts of beneficiaries to meet their basic needs, though, it remains largely a necessity-driven strategy rather than a sign of improved economic self-reliance. The e-voucher programme continues to play a vital role in supporting households' food access, with 83 percent of households still relying on it as their secondary source of income.

Food security has become a major concern for camp residents, with a significant rise in food insecurity across all households. High inflation rates (38%) and decreases in purchasing power deteriorated the situation and increased the risks of vulnerability among the camp beneficiaries, despite the increase in the e-voucher assistance transfer value in January 2025, and labor becoming more common as the main income source. Households increasingly allocate the majority of their limited budgets toward food expenses, and nearly all households adopted consumption coping strategies, differing in severity and frequency, to meet their food needs. The reliance on

livelihood coping strategies is also increasing, with some strategies being used for prolonged periods to the point that they are no longer viable.

While almost all households strive to meet their needs, the findings shed light on the disparities among households in terms of food security, coping strategies, and access to resources. Female-headed households experience greater hardship compared to male-headed households, and households with disabled members face additional barriers. These groups face a compounded burden, with limited access to income-generating opportunities (which are also informal and not sustainable for those who engage in) as well as coping strategies that the other households can implement, such as having assets to sell. The smaller households tend to struggle more than the households with more members, as larger families can benefit from economies of scale. Lastly, households with diversified income sources have a lower risk of vulnerability compared to those who have fewer income sources, underscoring the importance of expanding economic opportunities. There remains a need for further interventions to ensure that all households, especially those with higher vulnerabilities, have equal access to adequate resources and opportunities for improvement in meeting their basic needs.

From a programme accountability standpoint, findings highlight a strong improvement in programme awareness among beneficiaries, with a significant increase in the proportion of households fully informed about their rights, entitlements, and reporting mechanisms, though, an additional sensitization for male participants on how to report misconduct can further enhance beneficiary engagement. Notably, improvements in joint decision-making within households signal a positive movement toward greater gender equality. The results also confirm that almost all participants continue to experience respectful treatment and dignified conditions at programme sites, and face no access challenges, thanks to the programme's ongoing efforts on accountability.

The data indicates that the beneficiary households struggle to meet their needs in the current economic conditions despite the ongoing support. A more targeted approach is needed to address the specific needs of vulnerable groups, particularly those led by women and those with disabled members, to ensure they can meet their basic needs and improve their overall well-being. The findings emphasize the need for continued support, enhanced access to income-generating opportunities for those who have the capacity, and a more sustainable approach to food security to improve the lives of camp beneficiaries in the long term.