



Monthly Bulletin for Consumer Price Index and Inflation in Syria

Issue (7) – July 2025



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Acronyms and Abbreviations

AA	Autonomous Administration
CPI	Consumer Price Index
GoS	Government of Syrian regime
M-o-M	Month on month
SCPR	Syrian Center for Policy Research
SIG	Syrian Interim Government
SSG	Syrian Salvation Government
SYP-GA	SYP-Governed Areas
SYP	Syrian Pound
TL	Turkish Lira
TL-GA	TL-Governed areas
USD	United States Dollar
Y-o-Y	Year on year

1. Preamble

The bulletin provides an independent assessment of consumer prices and inflation rates in all Syrian regions based on a monthly survey of consumer prices carried out by the Syrian Center for Policy Research (SCPR) since October 2020. The SCPR had developed a methodology for building a price index based on components of the consumer basket, weighting, and market selection (See [SCPR's Consumer Price Index in Syria](#))

The analysis of the monthly consumer price survey results in Syria for July 2025 coincides with the entry into force of a package of legislative and financial measures. Decree No. 102 of 2025, which stipulated a nominal increase in salaries and wages by 200 per cent, is the most prominent of these measures. July 2025 also witnessed attempts to reform the tax framework aiming to improve tax justice, most notably raising the minimum income tax exemption limit to SYP 837000 to relieve limited-income groups;¹ however, tax brackets remained unchanged, meaning the remaining part of individuals' income will continue to be subject to high tax rates.

The General Authority for Land and Sea Ports signed an agreement worth USD 800 million with "DP World" to develop Tartous Port. The agreement included a comprehensive investment in developing, operating, and managing a multi-purpose terminal.² A similar agreement was also signed with the French company (CMA CGM) to develop Lattakia Port with investments amounting to EUR 230 million.³ No public tenders were issued nor prior announcement made regarding these investment agreements, which violates the principle of transparency; on the other hand, signing these agreements constitutes a concession of operational and financial control over sovereign assets in favor of strategic investors.

During July 2025, As-Sweida governorate witnessed an acute humanitarian crisis resulting from large-scale violence that included looting and burning of homes and shops, in addition to sectarian attacks and field executions targeting civilians. These events resulted in a high death toll exceeding 2038 people,⁴ mostly civilians, in addition to the displacement of more than 191000 people. This reflected on the general economic situation and price levels in the governorate.⁵

The country also faced an environmental and economic disaster with the outbreak of large-scale fires in the forests of Lattakia in June and July 2025, leading to the burning of more than 15000 hectares of agricultural land and forests and the displacement of hundreds of families.⁶ Some analyses attribute the recurrence of these fires to a combination of human factors, such as arson for political reasons, economic factors such as prohibited logging, and climatic factors such as climate change and drought, highlighting the repercussions of environmental fragility on the living and economic

¹ SANA. (2025, July 20). [Syrian Finance Minister: Minimum tax-exempt income threshold set at 837,000 SYP.](#)

² SANA. (2025, July 13). [Agreement signed between the General Authority for Land and Maritime Ports and DP World in the presence of President Al-Sharaa.](#)

³ SANA. (2025, May 1). [French firm CMA CGM invests in Latakia Port: A global maritime hub with projected revenue growth for the state.](#)

⁴ Syrian Observatory for Human Rights. (2025, September 13). [1,583 victims from the Druze community, including 808 summarily executed.](#)

⁵ North Press Agency. (2025, August 7). [The United Nations reveals displacement figures resulting from the events in As-Suwayda.](#)

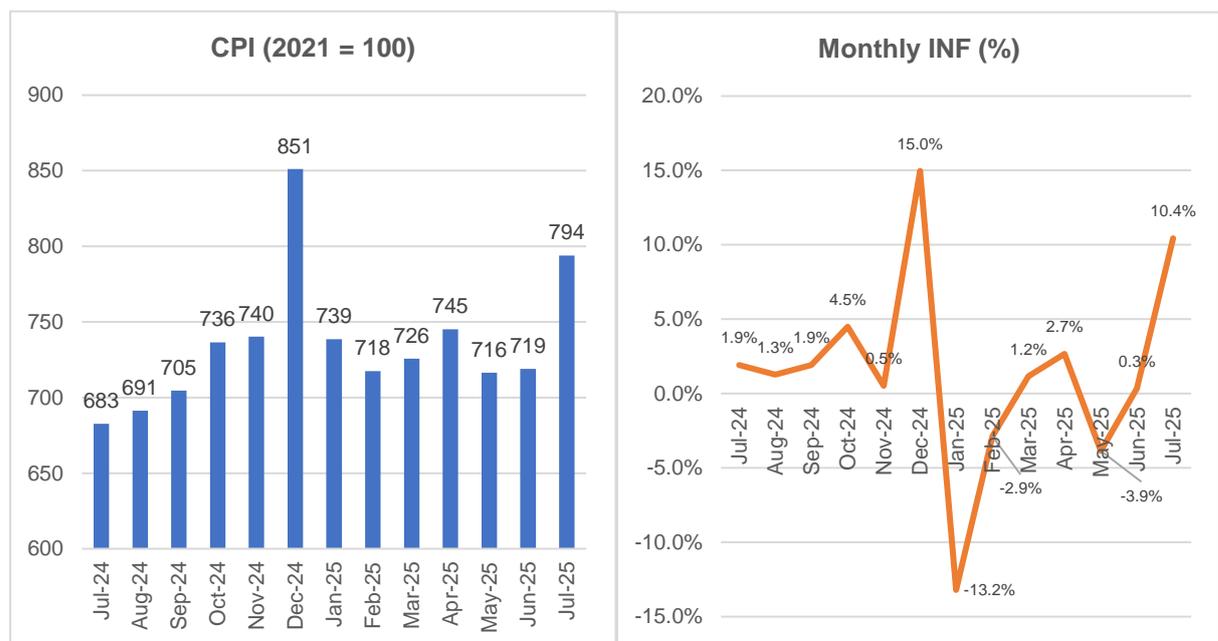
⁶ SANA. (2025, May 13). [Following ten catastrophic days: Emerging signs of wildfire containment in Syria.](#)

security of the affected areas. The continuous rise in the Consumer Price Index and the deterioration of the Syrian Pound exchange rate against the United States Dollar are a direct and clear reflection of the continued instability and the absence of effective policies.

2. Inflation in Syria, July 2025

The Consumer Price Index (CPI) data for the period from July 2024 to June 2025 showed an upward cumulative path, reflecting the continued structural inflationary pressures suffered by the Syrian economic environment, driven by macro factors such as the continued deterioration of the exchange rate and high production input costs. The Syrian economy was exposed to a severe inflationary shock in July 2025. This is mainly attributed to the events in As-Sweida and the siege imposed on it, as well as the continued policies of liberalizing fuel prices and opening imports, coupled with reliance on the US Dollar exchange rate as a primary pricing reference for a large number of goods in Syria, particularly energy carriers.

Figure (1): Consumer Price Index and Monthly Inflation (M-o-M) in Syria during the period (July 2024 – July 2025), (Base Year 2021 = 100) and (Inflation in per cent)



Syrian Center for Policy Research (SCPR) 2024 and 2025, Monthly Consumer Price Survey in Syria

Total inflation at the national level reached 10.4 per cent during July 2025, but it drops sharply to only 1.6 per cent when excluding As-Sweida governorate, which is affected by fighting and siege. This large difference is evidence of inflation caused by a local shock, as the security and political impact of the siege led to an unprecedented increase in the cost of living in one governorate, raising the national inflation index by more than six times its real rate in other regions.

Data shows that the "Transport" and "Housing, Electricity, Water, Gas, and Other Fuels" groups were the most affected by the shock, clearly reflecting the direct impact of the siege. The Transport group recorded catastrophic inflation of 32.5 per cent at the national level, while the same group witnessed stability in the rest of the governorates. This extreme disparity explains the transformation of transport from an economic factor into a political pressure tool manifested in road closures and high transport costs. Also, the

increase in prices of Housing, Water, Electricity, Gas, and Other Fuels (13.6 per cent vs. 3.1 per cent) indicates a sharp rise in emergency shelter rents and shortages of water and fuel needed to transport it.⁷

The analysis of monthly inflation in Syrian governorates (excluding As-Sweida) for July 2025 shows that the core inflation rate was around 1.6 per cent. Inflationary rise was mainly concentrated in the Tobacco group (5.4 per cent) and the Housing, Water, Electricity, Gas, and Other Fuels group (3.1 per cent), indicating that inflation was driven by rising rental costs. In contrast, the Food and Non-Alcoholic Beverages and Health groups recorded slight inflation (0.2 per cent), while the Transport group witnessed price stability during July compared to the previous month.

Table (1): Monthly Consumer Price Inflation in Syria for July 2025 by Consumption Groups, (Base Year 2021 = 100) and (Inflation in per cent)

#	Group	CPI Syria (June 2025)	CPI Syria (July 2025)	M-o-M Inflation	CPI Syria (Excl. As-Sweida) (June 2025)	CPI Syria (Excl. As-Sweida) (July 2025)	M-o-M Inflation Excl. As-Sweida
	All commodities	719	795	%10.4	727	738	%1.6
1	Food and non-alcoholic beverages	537	565	%5.2	539	539	%0.2
2	Tobacco	440	485	%10.3	441	465	%5.4
3	Clothes and shoes	574	597	%4.1	579	591	%2.0
4	Housing, water, electricity, and other fuel oils	1,192	1,359	%13.6	1,222	1,261	%3.1
5	Household equipment, supplies, and maintenance	449	451	%0.7	446	440	%1.3-
6	Health	735	752	%2.3	733	733	%0.1
7	Transportation	919	1,217	%32.5	910	910	%0.0
8	Communications	207	208	%0.5	208	209	%0.5
9	Entertainment and culture	470	483	%2.8	478	482	%0.8
10	Education	741	757	%2.2	741	749	%1.1
11+12	Various commodities and services	709	730	%3.0	711	717	%0.9

Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

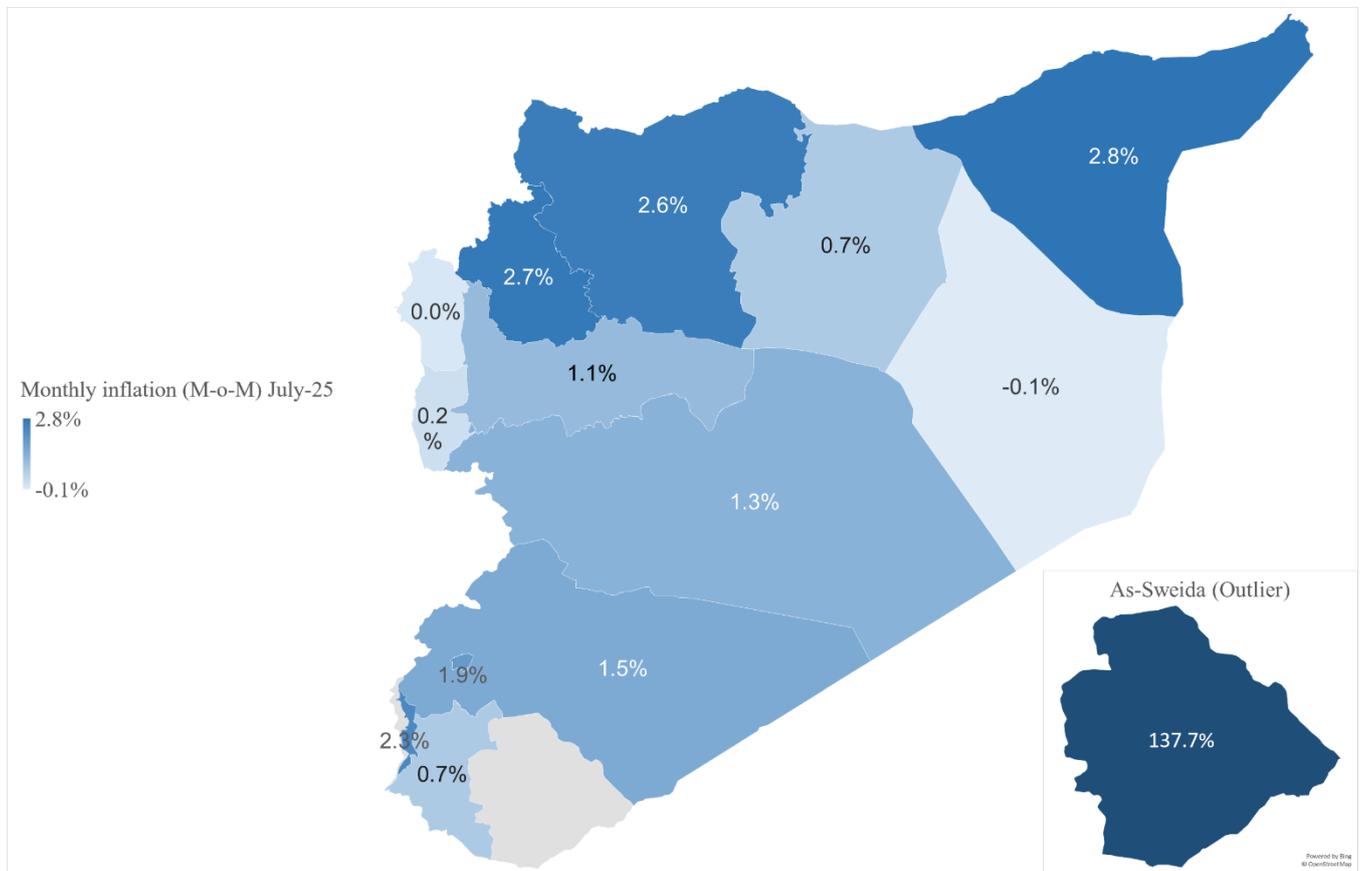
⁷ Based on the foregoing, the analysis will focus on inflation rates across all governorates of the Syrian Arab Republic, excluding As-Sweida Governorate. The study and analysis of As-Sweida Governorate are included in Annex (1).

3. Inflation by Governorate

July 2025 recorded a significant disparity in monthly inflation among governorates; Al-Hasakeh governorate recorded the highest monthly inflation rate at 2.8 per cent, followed by Idleb and Aleppo governorates at 2.6 per cent, then Quneitra governorate at 2.3 per cent. Meanwhile, Lattakia governorate recorded price stability, and prices rose slightly in Tartous, Dara'a, and Deir-Ezzor governorates, while decreasing by 0.1 per cent in Ar-Raqqa governorate.

At the level of control areas, the SYP-Governed Areas (SYP-GA) (excluding As-Sweida) recorded monthly inflation of 1.6 per cent, the Autonomous Administration (AA) areas recorded monthly inflation of 1.2 per cent, and the TL-Governed Areas (TL-GA) (formerly Interim and Salvation areas) recorded monthly inflation of 0.8 per cent.

Figure (2): Monthly Consumer Price Inflation (M-o-M) in Syria during July 2025 (in per cent)



Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria

4. Price Disparity between Governorates

Price levels across different regions in Syria: SYP-Governed Areas (SYP-GA), TL-Governed Areas (TL-GA),⁸ and Autonomous Administration (AA) areas witnessed sharp price disparities during July 2025. This economic disparity reflects the continued division of the Syrian market, especially in light of the disparity in support mechanisms for basic goods and public utilities, and the difference in the actual purchasing power of the currencies in circulation (Syrian Pound and Turkish Lira). This analysis aims to monitor and evaluate price gaps in main consumption groups and subsidized goods.

a) Food and Non-Alcoholic Beverages Group

The AA areas recorded the lowest average prices for bread varieties during July 2025, with the price of unified bakery bread reaching SYP 3000 per kg. This price compares to SYP 3635 in SYP-GA, and SYP 3422 in TL-GA. In the Meat group, SYP-GA dominated the scene by recording significantly higher meat prices, where the price of lamb meat reached about SYP 140000 per kg. In contrast, AA areas recorded the lowest prices for lamb and chicken meat.

In the Vegetables and Legumes group and the Fruits group, TL-GA showed the lowest prices for most fruit varieties (such as oranges, lemons, and apples) and vegetables and legumes (such as tomatoes, potatoes, chickpeas, and garlic). In the Milk, Cheese, and Eggs group, white cheese prices were relatively close, with AA areas recording the highest price (SYP 40,000 per kg). As for the Oils group, AA areas recorded the highest price for olive oil (SYP 60,000 per kg). In the Sugar and Confectionery group, although sugar was cheapest in SYP-GA, AA areas faced the highest prices in processed sweet products such as chocolate and Harissa; this increase is due to an increase in the costs of imported raw materials in AA areas.

b) Housing, Water, Electricity, Gas, and Other Fuels Group

Monthly housing rent data in July 2025 showed a massive gap between Syrian governorates; SYP-GA topped the list of average rents with SYP 1.9 million per month, and rents within it varied between a minimum of SYP 300000 per month in Quneitra and a maximum of SYP 6.7 million per month in Damascus. Meanwhile, the average monthly rent in TL-GA reached SYP 942000 per month (ranging between SYP 720000 per month in Idleb and SYP 1.28 million per month in Aleppo countryside). In contrast, the average rent in AA areas reached SYP 826000 per month (ranging between SYP 350000 in Deir-Ezzor and SYP 1.3 million in Ar-Raqqa). This disparity indicates an accelerated rise in the basic cost of living (housing) in SYP-GA, as a result of the great pressure after the fall of the regime and low supply versus demand, especially in governorate centers.

AA areas recorded the lowest price in most items of main goods and services related to energy. This reflected direct control over oil resources and their use as an economic tool to alleviate living burdens on the population. In contrast, SYP-GA showed a disparity; while they provided heavily subsidized services (such as water and electricity from the public grid), they imposed the highest costs for non-governmental electricity and water via

⁸ Note: The Transitional Government exercises control over all Syrian governorates, with the exception of the Autonomous Administration regions in Al-Hasakah, Raqqa, and Deir ez-Zor. Transitional Government territories have been categorized based on the circulating currency (Syrian Lira / Turkish Lira) to differentiate between the prevailing pricing policies.

tankers. This placed significant financial pressures on households and commercial activities dependent on energy. In a related context, TL-GA showed a lack of any subsidy in all mentioned services, indicating their greater reliance on liberalized market prices, which adds significant burdens on households; for example, the average price per kilowatt-hour of standard electricity in northwest Syria is SYP 1254, equivalent to three times the price of electricity in SYP-GA and 12 times the price of electricity in AA areas.

Table (2): Prices of a Group of Goods and Services Related to the Housing Sector by Control Area (in SYP)

	Item (Unit)	SYP-Governed Areas	TL-Governed Areas	AA Areas
1	Electricity bill from public grid (1 kWh)	424	1,254	104
2	Electricity bill from other sources (1 kWh)	10,945	3,622	717
3	Gas cylinder refill at official price (1 cylinder)	130,263	122,748	110,907
4	Fuel oil (Mazut) at official price (1 liter)	10,254	8,760	1,187
5	Fuel oil (Mazut) from black market (1 liter)	12,190	8,760	6,272
6	Water bill from official network (1 m ³)	38	3,467	78

Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

c) Transport Group

The consumer in SYP-GA bears the highest financial burdens for urban transport, recording the highest taxi fare (SYP 24,000 for 3 km) and the highest cost for free-market fuel (SYP 11,700 per liter). As for TL-GA, they recorded the highest fare for internal mass transit (SYP 4,849 per trip). AA areas provide significant fuel subsidies, where the price of subsidized gasoline reached SYP 4,770 per liter, which is much lower than other areas. This subsidy reflected directly on operational costs, recording the lowest fare for mass transit (bus or service taxi: SYP 2,000 per trip) and private transport (taxi for 3 km: SYP 14,000). Even the free-market fuel price was the lowest there (SYP 8,400 per liter).

Table (3): Prices of a group of goods and services related to the transport sector by control areas (in Syrian Pounds)

#	Item (Unit)	SYP-Governed Areas	TL-Governed Areas	AA Areas
1	Fuel for private car (subsidized) (1 liter)	11,450	11,416	4,770
2	Fuel for private car (free market) (1 liter)	11,720	11,416	6 8,440
3	Bus or service taxi fare inside city (1 trip)	2,782	4,849	2,067
4	Taxi fare inside city 3 km (3 km)	24,175	22,356	14,167
5	Inter-city bus fare (1 km)	383	234	298

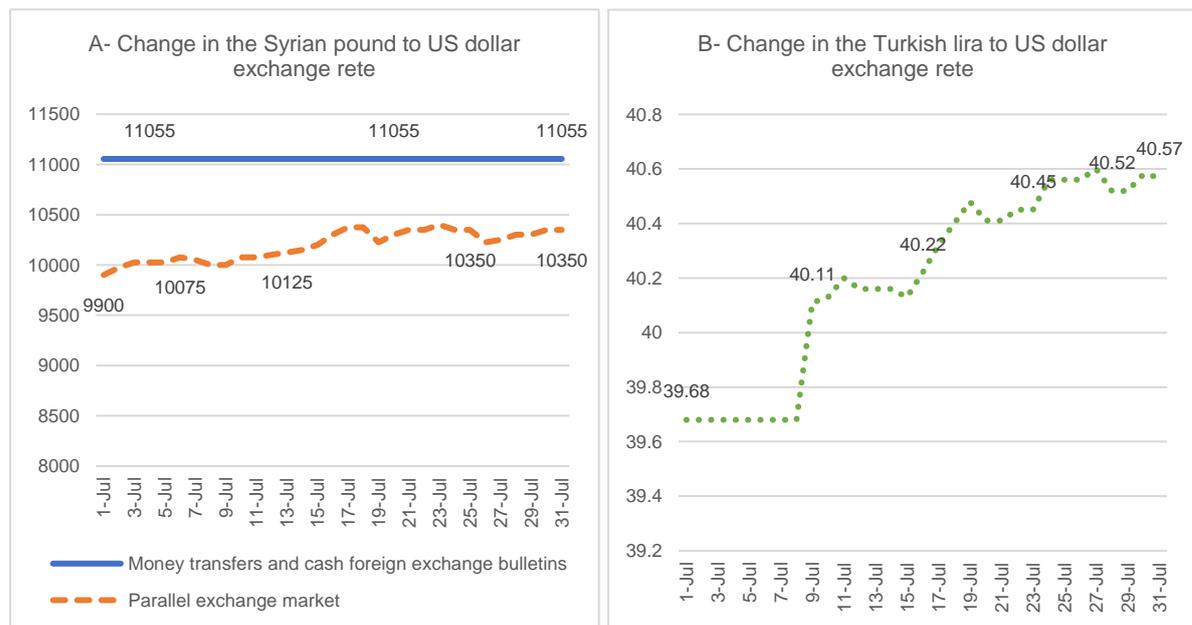
Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

5. Exchange Rate Changes

The Central Bank of Syria continued the policy of fixing the official remittance and exchange rate at SYP 11,055 per dollar throughout July 2025. In contrast, the unofficial US Dollar exchange rate witnessed a gradual rise, starting the month at a level approaching SYP 9,900 per dollar and rising to reach about SYP 10,350 per dollar by the end of the month. This change represents a deterioration in the value of the Syrian Pound by approximately 4.5 per cent within one month. The Central Bank's disclosure of its intention to change the Syrian currency by deleting two zeros played a role in pushing individuals and companies to search for an intermediate currency (US Dollar) to protect their savings. Continuous pressures to finance imports also played a role in increasing demand for foreign currency.

The Turkish Lira witnessed a decline (by 1.8 per cent) against the Dollar, as its exchange rate changed from TL 39.5 per dollar in June to TL 40.5 in July, which reflected on the prices of goods and services in areas dealing in Turkish Lira (Idleb and Aleppo countryside). Reliance on the Turkish Lira in the northern regions makes their economy directly linked to Turkish fluctuations.

Figure (3): Exchange rate changes of the Syrian Pound and Turkish Lira against the United States Dollar during July 2025



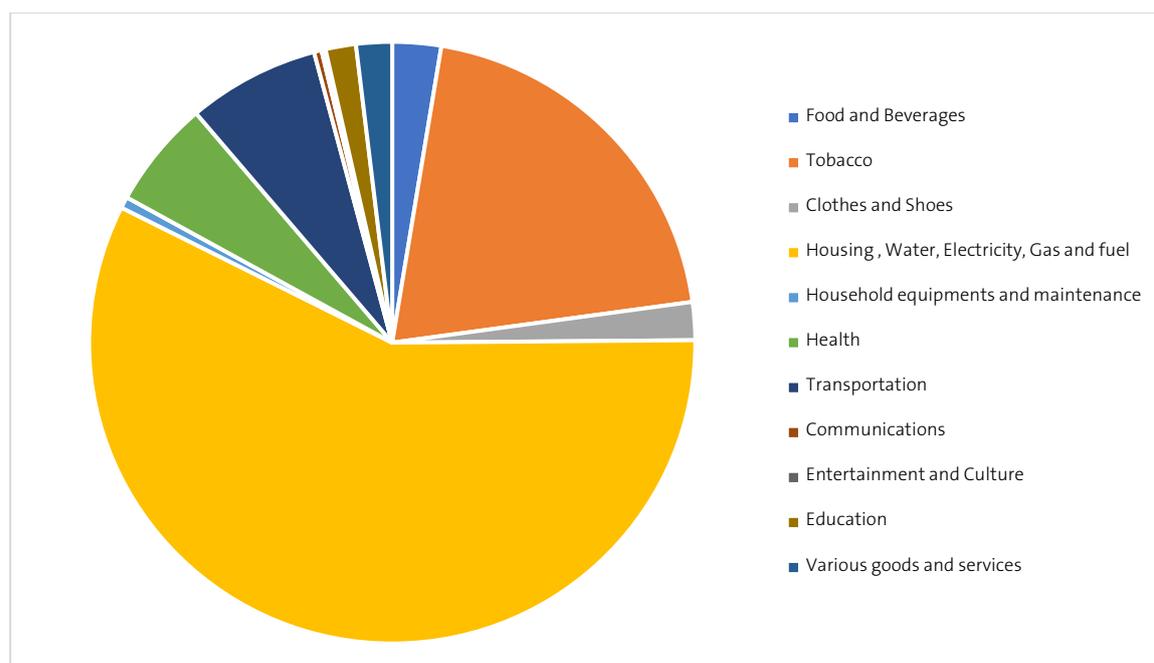
Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria

6. Contributors to Inflation

Data analyzing the contribution of commodity groups to the monthly inflation rate (M-o-M) for July shows that the Housing, Water, Electricity, Gas, and Other Fuels group is the primary driver of inflationary pressures. It accounted for the largest contribution at 58.3 per cent of total inflation, indicating that any changes in energy prices (oil derivatives), which are directly linked to the exchange rate, are reflected directly in a massive and multiplied inflationary pressure on the cost of living, transport, and production. Rents also played a major role in this contribution in light of increased demand for housing in major cities such as Damascus, Aleppo, and Homs. The Tobacco group came in second place with a contribution of 20.5 per cent, driven by a shortage of local tobacco production and rising prices in the markets.

The Food and Non-Alcoholic Beverages group contributed 7 per cent of monthly inflation, confirming the continued deterioration of purchasing power for basic goods. This rise indicates that the main driver of the high cost of living is inflation in the energy and housing sectors, where transport and fuel costs directly affect food prices.

Figure (4): Contribution of Main Consumption Groups to the Monthly Inflation Rate (M-o-M) for July 2025 (Excluding As-Sweida) (in per cent)



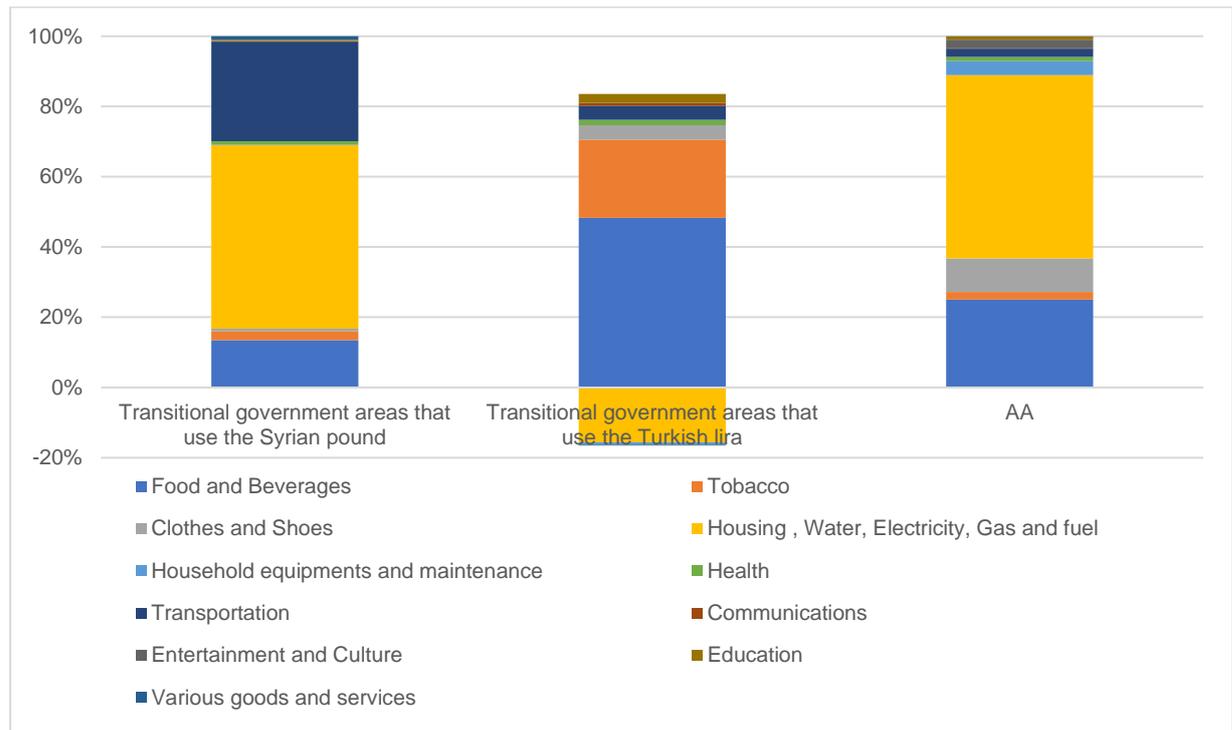
Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

Monthly inflation contribution data shows a sharp disparity in price drivers among different Syrian regions. In SYP-Governed Areas (excluding As-Sweida), inflation was mainly driven by the Housing, Water, and Fuel group which contributed 73.5 per cent, followed by the Tobacco group at 29.7 per cent. The most important observation in these areas is the significant deflationary contribution of the Food and Beverages sector, which amounted to (-14) per cent, alleviating the severity of total inflation.

In contrast, TL-Governed Areas witnessed violent food inflation, where the Food and Non-Alcoholic Beverages group contributed 71 per cent of inflation, while the Housing, Water, and Fuel group recorded a negative contribution of (-24) per cent due to decreased

demand for housing there due to the return of a large number of families to their original cities after the fall of the regime. In AA areas, inflationary pressures were more comprehensive, with the Housing, Water, and Fuel group dominating the contribution at 49 per cent, but followed directly by the Food and Non-Alcoholic Beverages group with a significant contribution of 26.6 per cent, indicating that residents of these areas face a simultaneous rise in prices of basic services and food goods alike.

Figure (5): Contribution of Main Consumption Groups to the Monthly Inflation Rate (M-o-M) for July 2025 by control areas (in per cent)



Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

In general, this disparity reflects the extent to which circulating currencies and local policies affect inflation drivers, as Turkish Lira users face rising food prices, while Syrian Pound users bear the burden of high housing and energy costs.

7. Wages in Syria July 2025

The average monthly wage for a university-educated employee in the public sector (at entry level) in Syria reached approximately SYP 1.1 million in July 2025, an increase of 200 per cent due to the government raising public sector worker wages by 200 per cent. Meanwhile, the average monthly wage for a worker in the private sector reached SYP 1.13 million, while an employee in the civil sector recorded SYP 2.33 million during the same month.

When comparing nominal wages (at current prices) between control areas, it becomes clear that wages in both the public and private sectors in TL-Governed Areas (TL-GA) (formerly Interim and Salvation areas) were the highest, followed by wages in AA areas, while wages in SYP-Governed Areas (SYP-GA) (formerly GoS areas) came in last place. It is worth noting that wages vary among the three regions.⁹

Table (4): Average Monthly Wages in Syria during July 2025 (in Syrian Pounds)

	SYP-Governed areas	TL-Governed areas	AA areas	Whole of Syria
A- Public sector workers				
Employee Wage (University Professor)	3030000	5202428	3090000	3300147
Employee Wage (University Grad)	935000	2066556	1060000	1109182
Employee Wage (4th band)	895000	1212899	1040000	965884
B- Private sector workers				
Company Manager Wage	3266558	3898656	2175702	3251953
Shop Worker Wage	1097781	1313784	1035907	1132040
C- Civil sector workers				
Employee Wage (University Grad)	1812887	4189790	3121236	2330875

Note: Wages of workers in former Salvation Government areas are set in US Dollars or their equivalent in Turkish Lira, and workers in former Interim Government areas receive their wages in Turkish Lira. Wage values in this table have been converted to Syrian Pounds for comparison with the rest of the regions.

Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

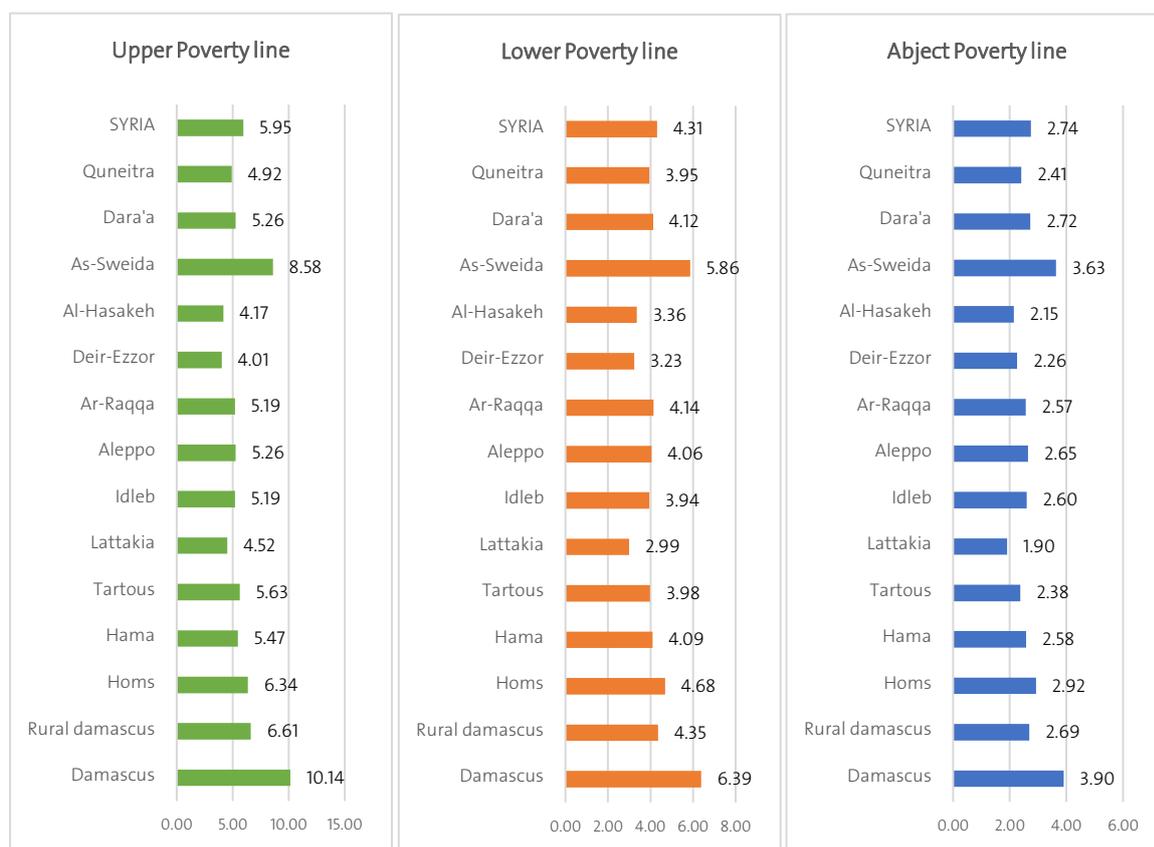
⁹ Despite the comparatively high wages offered in both the public and private sectors, civil sector workers in regions governed by the Syrian government receive significantly lower compensation relative to other areas. Their earnings amount to only 43 per cent of the wages earned by civil sector workers in self-administered regions and 58 per cent of those in the areas of the Transitional government that deal with the Turkish lira as of July 2025.

8. Poverty Lines in Syria, July 2025

The household abject poverty line¹⁰ (as an indicator of food deprivation) at the Syria level in July 2025 reached SYP 2.74 million per month, the lower poverty line reached SYP 4.31 million, and the upper poverty line reached SYP 5.95 million. Poverty lines recorded their highest levels in the governorates of As-Sweida and Damascus, while the governorates of Al-Hasakeh, Deir-Ezzor, and Lattakia recorded the lowest poverty line values during July 2025.

The economic siege and rising prices of basic goods in As-Sweida governorate caused an exacerbation of the living crisis, pushing it to record the highest poverty levels among governorates in July 2025. Poverty lines jumped sharply; the abject poverty line rose to SYP 3.6 million, and the lower poverty line to SYP 5.86 million, while the upper poverty line reached SYP 8.58 million. These sharp increases demonstrate the depth of the economic and social deterioration witnessed by the governorate.

Figure (6): Monthly Poverty Lines in Syria during July 2025 (SYP million)



Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

¹⁰ Poverty lines (abject, lower, and upper) were calculated by measuring the effect of inflation on the 2009 poverty lines.

Comparing nominal wages with monthly poverty levels in July 2025 shows relative improvement in covering living expenses for employed groups. As a result of the recent wage increase, the coverage of the average wage of a university-educated employee in the public sector for the abject poverty line (reflecting food deprivation) reached 40 per cent, reached 41 per cent for a worker in the private sector, while reaching 85 per cent for an employee in the civil sector. Comparing civil sector worker wages reveals significant regional disparity exceeding abject poverty levels. In TL-Governed Areas, the coverage ratio reached 161 per cent, compared to 138 per cent in AA areas, and 65 per cent in SYP-Governed Areas.

Comparing nominal wages with monthly poverty levels in July 2025 shows relative improvement in covering living expenses for employed groups. As a result of the recent wage increase, the coverage of the average wage of a university-educated employee in the public sector for the abject poverty line (reflecting food deprivation) reached 40 per cent, reached 41 per cent for a worker in the private sector, while reaching 85 per cent for an employee in the civil sector. Comparing civil sector worker wages reveals significant regional disparity exceeding abject poverty levels. In TL-Governed Areas, the coverage ratio reached 161 per cent, compared to 138 per cent in AA areas, and 65 per cent in SYP-Governed Areas.

Although employees in the civil sector are better off, having managed in some areas to exceed poverty lines, they live in great danger at the mercy of humanitarian aid, which has shrunk significantly over the last year, and many have left their jobs due to funding reasons. The coverage ratio of average wages of public sector employees in SYP-Governed Areas for the upper poverty line reached only 15.3 per cent, and 24.5 per cent in AA areas, while reaching 40 per cent in TL-Governed Areas during July 2025. This is a dangerous indicator showing that all government employees in the three regions receive wages that do not cover the minimum required goods and services needed for a decent life.

Table (5): Monthly Wage Gap from Poverty Lines in Syria during July 2025 (in per cent)

	SYP-Governed areas	TL-Governed areas	AA areas	Whole of Syria
A- Wage Coverage of Abject Poverty Line				
Public Employee (Uni Grad)	33.5%	79.6%	46.8%	40.4%
Private Sector Worker	39.4%	50.6%	45.7%	41.3%
Civil Sector Employee	65.0%	161.4%	137.8%	85.0%
B- Wage Coverage of Lower Poverty Line				
Public Employee (Uni Grad)	21.2%	52.3%	30.5%	25.7%
Private Sector Worker	24.9%	33.2%	29.8%	26.2%
Civil Sector Employee	41.2%	105.9%	89.9%	54.0%
C- Wage Coverage of Upper Poverty Line				
Public Employee (Uni Grad)	15.3%	40.0%	24.5%	18.6%
Private Sector Worker	18.0%	25.4%	23.9%	19.0%
Civil Sector Employee	29.7%	81.1%	72.2%	39.1%

Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

The results confirm that the wages of most workers do not cover the minimum basic needs for a decent life, and suffering increases in SYP areas, while the crisis of As-Sweida

employees specifically worsened due to not receiving their salaries, doubling their suffering as a result of the massive rise in prices.

9. Conclusion

The analysis of price data results for July 2025 indicates that worsening inflationary pressures in Syria are a direct reflection of a deep governance crisis with broad social dimensions. The continuous rise in prices, clearly embodied in the case of As-Sweida as a model for the impact of security shocks and siege on economic stability.

The dominance of housing and energy costs as key drivers of inflation is an indication of failure to manage strategic resources and the depletion of exchange rate value, which essentially represents a systematic transfer of the cost of administrative failure to the end consumer.

The analysis also highlights a deep gap between income levels, even after recent wage adjustments, and the requirements of decent living, confirming the inadequacy of partial monetary interventions in addressing structural failures related to production and liquidity.

The disparity in purchasing power between regions using the national currency and those relying on foreign currencies shows a severe fragmentation in the national market and continuous erosion of the central government's monetary sovereignty.

Annexes

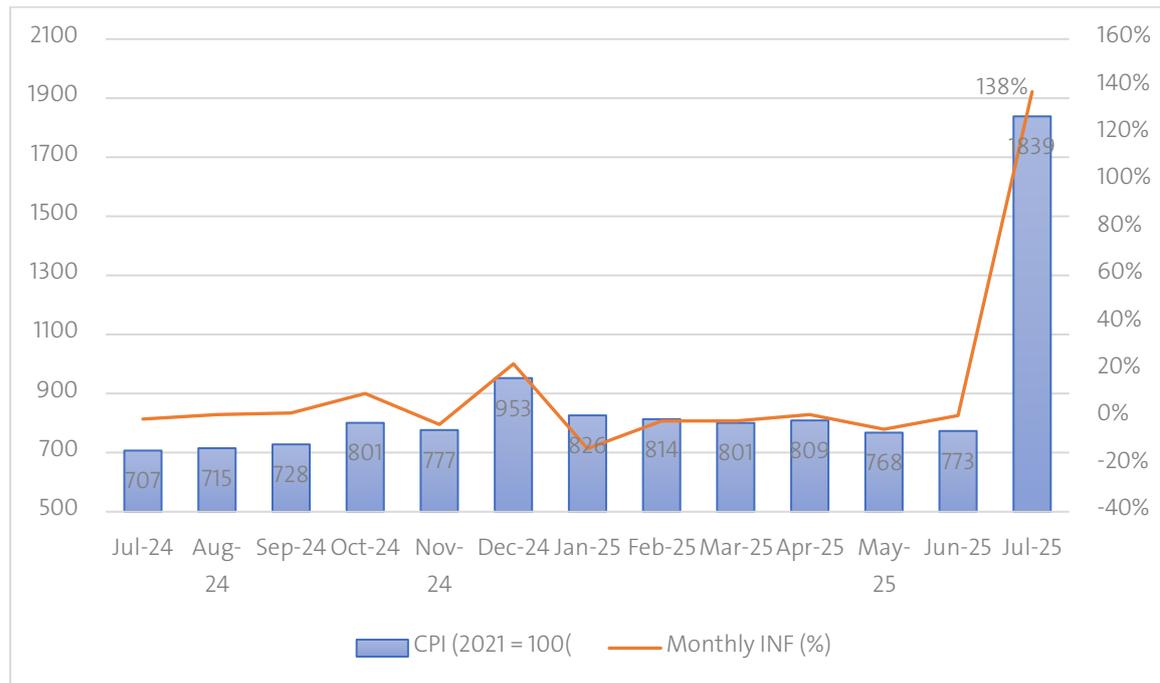
Annex (1): Hyperinflation in As-Sweida Governorate under the siege of July 2025

1. Preamble

During July 2025, As-Sweida governorate witnessed an acute humanitarian and economic crisis following the outbreak of violent clashes between Bedouin fighters loyal to the Transitional Government and armed militias from the governorate. The situation worsened due to government intervention and Israeli airstrikes,¹¹ leading to large-scale violence including looting and burning of homes and shops, in addition to sectarian attacks and field executions targeting civilians. The events resulted in a horrific death toll exceeding 2038 people,¹² in addition to the displacement of more than 191000 people.¹³

This crisis coincided with an unprecedented economic crisis resulting from a siege imposed by the Transitional Government on As-Sweida governorate, leading to a massive rise in the price index from 773 in June to 1839 in July (Base Year 2021), recording a monthly inflation rate of 138 per cent. This rapid rise in prices reflects a collapse in the purchasing power of the population and deterioration in supply chains, leading to severe shortages of basic goods.

Annex (1): Hyperinflation in As-Sweida governorate under the siege of July 2025



Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.

¹¹ Organization for the Defense of People's Rights Worldwide. (2025, July 22). [Syria: Violations and humanitarian emergency amidst As-Suwayda clashes.](#)

¹² Syrian Observatory for Human Rights. (2025, September 13). [1,583 victims from the Druze community, including 808 summarily executed.](#)

¹³ North Press Agency. (2025, August 7). [The United Nations reveals displacement figures resulting from the events in As-Suwayda.](#)

2. Sectoral Analysis (Significantly Affected Sectors)

The Transport group witnessed the highest monthly inflation rate in As-Sweida governorate at 318 per cent. This sharp rise weighed directly on transport and shipping costs, affecting prices of other goods and services. It was followed by the Housing, Water, Electricity, Gas, and Other Fuels group at 208 per cent, adding great pressure on household budgets and savings, as these expenses are essentials that are difficult to forgo. The Health group followed with an increase of 31 per cent, reflecting increasing medical care and medication costs, affecting lower-income groups in particular.

Table (1): Monthly consumer price inflation in As-Sweida for July 2025 by consumption groups, (Base year 2021 = 100) and (Inflation in per cent)

#	Group	CPI Index Jun 2025	CPI Index July 2025	Monthly Inflation (M-o-M)
	All commodities	773	1839	137.7%
1	Food and non-alcoholic beverages	550	898	63.1%
2	Tobacco	458	790	72.4%
3	Clothes and shoes	659	893	35.5%
4	Housing, water, electricity, and other fuel oils	1505	4639	208.3%
5	Household equipment, supplies, and maintenance	403	513	27.4%
6	Health	849	1115	31.2%
7	Transportation	810	3386	318.1%
8	Communications	331	333	0.4%
9	Entertainment and culture	407	551	35.4%
10	Education	653	695	6.4%
11+12	Various commodities and services	816	1082	32.6%

Source: Syrian Center for Policy Research 2025, Monthly Consumer Price Survey in Syria.

1) Transport Group

The transport sector in As-Sweida governorate witnessed a sharp and unprecedented rise in prices during July 2025. The index for the transport group jumped from 810 in June to 3386 in July (Base year 2021), representing a massive monthly inflation rate of 318 per cent. This rise is directly due to the significant increase in fuel prices, where the price of a liter of gasoline ranged between SYP 125000 and SYP 175000 in the black market, after being between SYP 11000 and SYP 12000 in the previous month. This rampant inflation in transport costs negatively reflected on the prices of all goods and services.

The tight siege on the governorate led to a severe shortage of fuel, disrupting supply chains and raising fuel prices in the informal market to unprecedented levels. This significant increase in fuel price led to a direct increase in operating costs for vehicles, whether for personal or commercial use. It also led to residents standing for long hours to fill a little fuel from stations at the official price, constituting a loss in time and productivity.

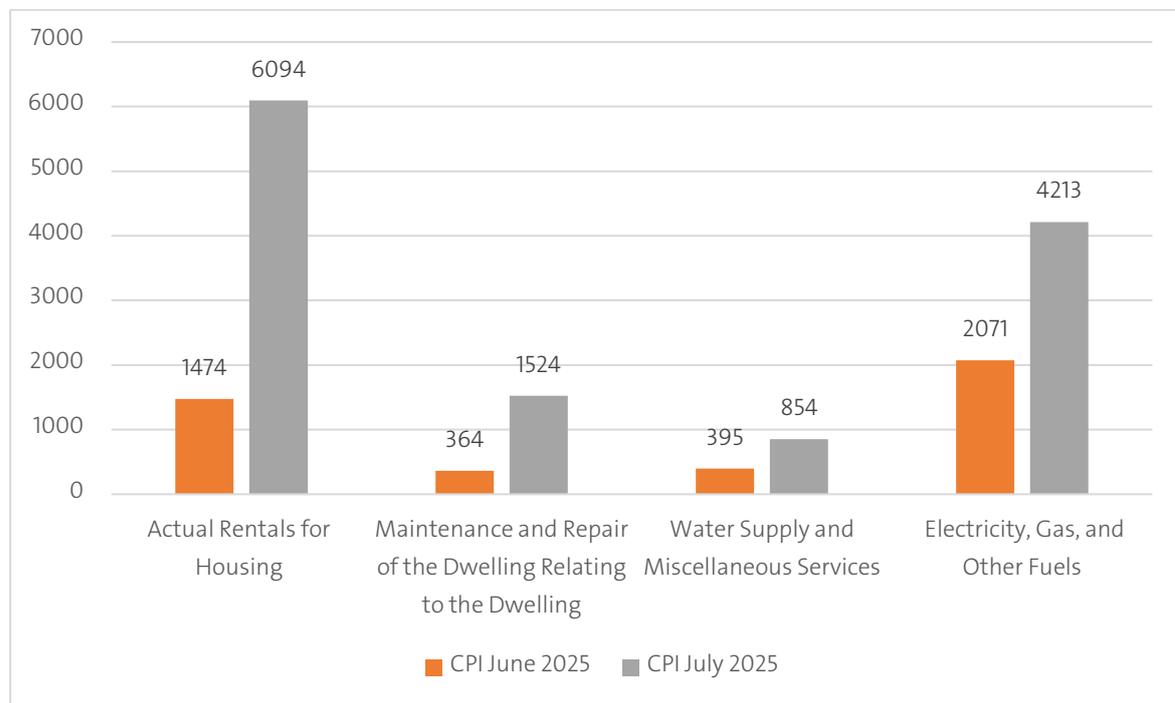
These conditions resulted in a noticeable contraction in transport movement, which in turn affected supply chains and led to shortages of goods in markets. High transport costs and royalties imposed at the governorate entrances to bring in food items are added to the

final product price, leading to a comprehensive increase in prices of all goods, including foodstuffs and medicines.

2) Housing, Water, Electricity, Gas, and Other Fuels Group

The Housing, Water, Electricity, Gas, and Other Fuels group recorded sharp monthly inflation in As-Sweida governorate in July 2025, as its index jumped from 1,505 in June to 4,639 in July (Base year 2021); this rise represents a rampant monthly inflation rate of 208 per cent. At the level of subgroups, housing rents rose by 313 per cent, housing maintenance and repair by 319 per cent, water supply and miscellaneous services related to housing by 116 per cent, and electricity, gas, and other fuels by 103 per cent.

Figure (2): Price Index for Housing, Water, Electricity, Gas, and Other Fuels group for June and July 2025 in As-Sweida (2021 = 100)



Source: Syrian Center for Policy Research, Monthly Price Survey July 2025.

This notable rise in prices is the result of several combined factors:

- **Rising residential rental costs:** Large waves of displacement and a shortage of housing supply led to increased demand for housing and a significant rise in rents during this month.
- **Fuel scarcity and economic siege:** The imposed siege led to a severe shortage in fuel supplies. This turned fuel into a rare and hard-to-get commodity, directly affecting transport and operating costs in all sectors.
- **Disruption of energy infrastructure:** The rise in energy costs is attributed to damage to the main electricity grid and the main line stopping work. This malfunction led to reliance on a reserve line with limited capacity, while the main line could not be repaired because it is located in an unsafe area.

- **Rising electricity generation costs:** Due to shortages of government fuel, the market witnessed an increasing shift towards reliance on private generators, in addition to solar energy systems and batteries. This reliance led to a massive increase in energy generation costs for consumers given the high operating and maintenance costs of these alternatives.
- **Stoppage of water and gas supplies:** The interruption of government supplies of water and gas led to the emergence of a black market for these basic utilities. This shift caused the imposition of exorbitant and unregulated prices, negatively affecting the purchasing power of the population.

The price of a water tank (5 barrels) reached SYP 125000 in July after being around 20000 in the previous month; the rise in water prices is an indicator of the depth of the crisis. Given the outage of government electricity for long hours, pumping groundwater became totally dependent on generators running on fuel. In light of scarcity and high prices of fuel, citizens were forced to buy fuel at high prices to fill water. The economic crisis in As-Sweida was exacerbated by the security factor, as the loss of control over water wells in "Al-Tha'la" village¹⁴ led to reducing available water sources. This shortage increased pressure on remaining wells and raised their cost significantly, reflecting directly on prices of water distributed to residents.

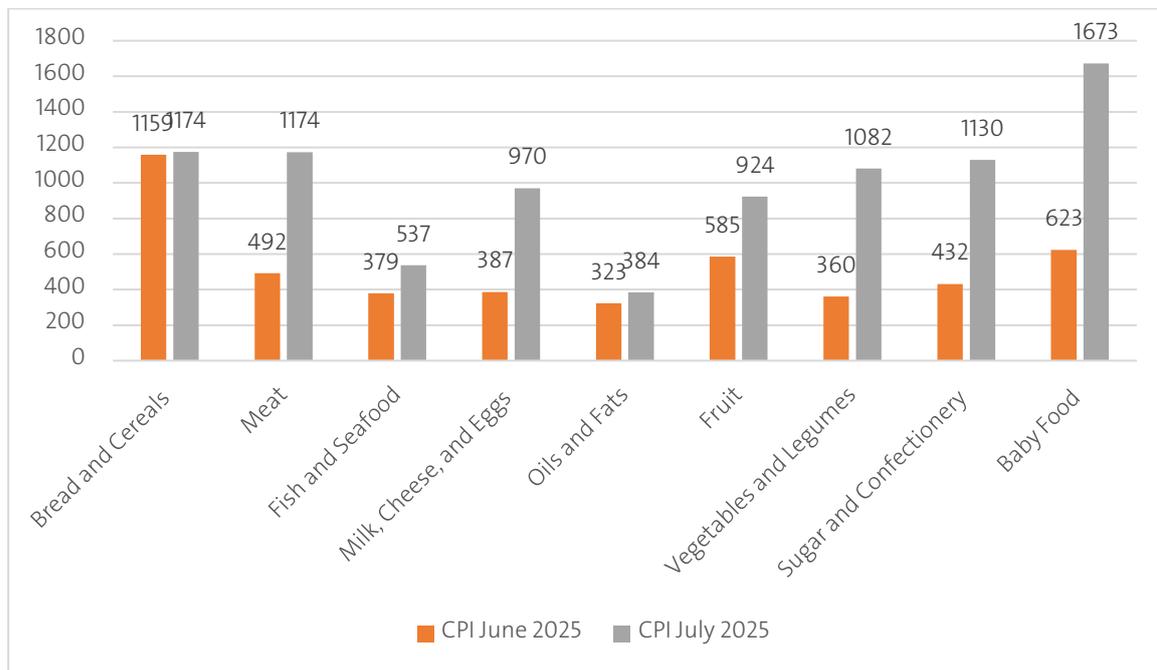
3) Food and Non-Alcoholic Beverages Group

The Food and Non-Alcoholic Beverages group witnessed a significant increase in prices during July 2025. The price index for this group rose from 550 in June 2025 to 898 in July, based on the base year 2021. This rise reflects a monthly inflation rate of 63 per cent within this group. This price increase in basic food items constitutes a direct threat to the food security of the population. Below is a monitoring of the most important food commodities that witnessed significant inflation in July:

- **Poultry Meat:** The price of a kilogram of chicken meat rose from SYP 28000 to SYP 70000.
- **Eggs:** The price of an egg tray rose from SYP 27000 to SYP 75000.
- **Fruits and Vegetables:** Prices of apples, tomatoes, and potatoes recorded noticeable increases, where the price of a kilogram of apples rose from SYP 15000 to SYP 22000, tomatoes from SYP 4000 to SYP 12000, and salty potatoes from SYP 2000 to SYP 10000.
- **Sugar:** The price of a kilogram of white sugar rose from SYP 9000 to SYP 19000.
- **Baby Food:** Baby food prices witnessed an increase from SYP 11000 to SYP 20000.

¹⁴ Al-Hal Net. (2025, August 5). [Suffocating water crisis in As-Suwayda as Tha'lah wells shut down: Warnings of imminent disaster and suspicious official silence. Has water become a new pressure tactic?](#)

**Figure (3): Price Index for Food group for June and July 2025 in As-Sweida
(Base year 2021 = 100)**



Source: Syrian Center for Policy Research, Monthly Price Survey July 2025.

This rise is due to several factors, most importantly the difficulty of food items entering the governorate. And reliance on limited stock, smuggling, or paying royalties to bring in food goods, which is done at exorbitant prices.

The rise in food commodity prices was exacerbated by the continuous power outage for more than 21 hours daily. This situation led to the spoilage of large quantities of food requiring refrigeration, such as meat, dairy, and vegetables. Initially, these products were distributed for free to residents, but subsequently, a shortage occurred in the supply available in the market, raising the prices of remaining goods. This represented a direct economic loss for merchants and citizens, prompting merchants to compensate their losses by increasing prices of consumable goods by transferring the additional cost to the final customer.

The rise in the Food group index reflects a severe shortage of basic goods such as baby milk and nutritional supplements. Under the siege, these goods became rare and are sold at high prices in the black market. This posed a direct threat to children's health, as parents were forced to reduce quantities allocated to their children or resort to unhealthy alternatives. This rise in prices is considered a clear indicator of a humanitarian crisis, disproportionately affecting the most vulnerable groups.

4) Health and Education Groups

The Health group witnessed a massive rise in prices during the siege, as its index jumped from 849 in June to 1115 in July 2025 (Base year 2021). This rise reflects a monthly inflation rate of 31 per cent, meaning the cost of healthcare and medical supplies doubled in just one month, becoming out of reach for most residents.

This massive rise is attributed to several factors: severe scarcity of medicines due to restricting the entry of humanitarian convoys. The crisis worsened specifically for cancer patients in the governorate,¹⁵ as they suffer from a lack of medicines designated for their treatment, placing their lives in imminent danger. And increased demand for medical care: security events led to rising numbers of injured, increasing pressure on the medical sector. In addition to the flourishing of the black market: where essential medicines are sold at exorbitant prices, exposing patients' lives to danger. This damage is not just an economic crisis, but a humanitarian disaster, as inability to buy medicine means facing death for patients with chronic diseases, or worsening conditions for the injured.

The educational process stopped in As-Sweida governorate during July 2025 due to two main factors: 1) Transformation of schools into shelter centers: As a result of internal displacement of more than 191000 people, most schools turned into centers to shelter families, leading to a complete suspension of schooling. 2) Isolating the governorate educationally from other governorates: The siege led to isolating the governorate, halting coordination with central educational ministries; Baccalaureate student exams stopped, and all As-Sweida students returned from university cities in other governorates to their governorate due to exposure to security risks and harassment; all this led to a complete stoppage of the educational process for As-Sweida students during July 2025.

5) Non-Food Consumer Goods (Clothing and Equipment)

The factor of looting and theft played a decisive role in exacerbating the economic crisis in As-Sweida. This phenomenon goes beyond effects of traditional inflation, causing a severe shortage of goods, especially electronics and home appliances, to the extent that many goods disappeared from markets completely. Consequently, monitoring prices of these goods became very difficult.

Under the siege, supply of certain goods and services such as clothes and shoes decreased because they are considered luxuries that are not traded. This confirms that the economic priorities of the population shifted completely to be limited to meeting basic needs only for survival.

3. Conclusion

The economic crisis in As-Sweida governorate constitutes a model of a compound crisis, where factors of security and economic siege combined with loss of control over vital resources, leading to hyperinflation in active sectors; this crisis is a direct reflection of a deep humanitarian crisis, placing the most vulnerable groups before existential threats.

This governorate is no longer just an area suffering from inflation, but has become an area of a full-fledged economic and humanitarian crisis. The heavy losses inflicted on property, looting and sabotage operations, in addition to heavy human losses, confirm that As-Sweida has turned into a stricken area in every sense of the word. These shocking data highlight the necessity of rapid and effective action to lift the siege on the governorate and provide immediate humanitarian aid, to save what can be saved of the economic structure and human life, and restore hope for stability for citizens.

¹⁵ North Press Agency. (2025, September 13). [Cancer patients in As-Suwayda between pain and siege: Unavailable medication and desperate pleas.](#)

Appendix (2): Consumer Price Index in Syria by Major Consumption Groups and Governorate in July 2025, (2021 = 100)

	Damascus	Rural Damascus	Homs	Hama	Tartous	Lattakia	Idleb	Aleppo	Ar-Raqqa	Deir-Ezzor	Al-Hasakeh	As-Sweida	Dara'a	Quneitra	SYRIA
All commodities	1,084	847	1,057	824	886	750	553	815	624	655	715	1,839	716	801	794
Food and non-alcoholic beverages	603	569	606	610	573	548	555	556	537	690	607	898	561	605	565
Tobacco	410	405	532	457	497	455	628	467	355	570	418	790	542	358	485
Clothing and Shoes	505	515	638	663	724	639	739	693	623	532	795	893	468	397	597
Housing, water, electricity, gas, and other fuels	1,788	1,638	2,139	1,461	1,510	1,142	659	1,158	916	726	945	4,639	1,309	1,320	1,355
Household equipment and maintenance	535	432	460	613	432	370	453	402	423	485	756	513	510	573	452
Health	842	792	747	721	744	813	503	728	831	665	742	1,115	849	673	752
Transportation	1,540	1,193	1,435	1,253	1,393	1,498	552	839	690	635	986	3,386	778	1,508	1,217
Communications	329	328	329	327	327	326	42	523	329	332	329	333	331	327	208
Culture and entertainment	347	481	417	369	402	436	341	572	1,319	419	547	551	396	377	483
Education	822	640	853	745	868	854	1,125	705	457	467	814	695	981	674	757
Various goods and services	885	701	748	702	876	522	539	772	630	669	661	1,082	645	815	730

Source: Syrian Center for Policy Research (SCPR) 2025, Monthly Consumer Price Survey in Syria.



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