BACKGROUND

Monthly Market Monitoring Bulletin is produced jointly by FSIS Programme of the Food and Agriculture Organization of the United Nations (FAO) in partnership with the Food Security Technical Secretariat (FSTS) of the Ministry of Planning and International Cooperation (MoPIC) funded by the European Union (EU).

The market data and information is collected from twenty-one (21) governorates through the Governorate Focal Units (GFUs). The price data is collected from at least three representative market centers in the main cities and 3-4 markets in the districts (rural areas) (see alongside map the market distribution). Retail prices are monitored and collected on weekly basis from the monitored markets of the following governorates: Abyan, Aden, Al Dhaleêé, Al Bayda, Al Jawêé, Dhamar, Hadramaut Coast (Al Mukalla), Hajjah, Al Hudaydah, Ibb, Lahj, Amanat Al Asimah (Sana’a City), Shabwah, Taizz, Al Maharah, Amran, Raymah, Al Mahwit, Marib, Sa’ada, Socotra in addition to Hadramout Valley (Sayun) through the Governorate Focal Units (GFUs).

Commodity prices are monitored and collected on weekly basis and averaged for the month. The district level rural markets were selected based on their representativeness in the governorate. Comprehensive market mapping was done and importance of each rural market was established in a consultative manner to capture locally produced commodities and linkages to the city markets. Three to four markets were selected to represent rural markets within a governorate. The rural markets also capture the supply chain of imported commodities reaching the rural areas and their differences. This Bulletin provides easy to use tables and charts that show monthly prices trends. It also allows users to compare the current prices with the previous months, one year and the pre-crisis prices of February 2015. Further, it gives comparison of prices between governorate main city markets and rural markets, which are further analyzed to give national prices estimates of key imported food commodities, locally produced cereals and fuel commodities.

KEY HIGHLIGHTS

Global
The FAO Food Price Index (FFPI) averaged 94.2 points in July 2020, up 1.1 points (1.2 percent) from June. Rising for the second consecutive month, the July value is nearly 1 point (1 percent) above its level in the corresponding month last year. The FAO Cereal Price Index averaged 96.9 points in July, almost unchanged from June and up 0.4 points (0.4 percent) from the corresponding month last year. In the wheat markets, the average July value at around the same level as in the previous month, almost 2 percent higher than in July 2019.

Fuel materials
For the two consecutive months of June and July, the fuel crisis (mainly petrol and Diesel) suffered huge shortages. There were long queues spotted in most of filling station forcing some to shutdown especially in the northern governorates. The parallel markets took advantage of the situation and increased the prices by 103% compared to official prices. Similarly, cooking gas experienced same shortages due to high demands associated to Eid Al Adha festivities, the prices increased by 48% compared to official retail prices.

Locally produced Cereals
All locally produced cereals retail prices remained stable in July compared to previous months.

Imported commodities
The flow of imported basic food commodities to the country coupled with balanced demand and supply remain relatively stable. This has resulted to stability of retail prices of sugar and non-basmati rice that remained the same compared to June. Similarly, basmati rice, Wheat flour and imported cooking oil followed the same trends with marginal increase of 1%. Among other imported food commodities, only wheat grains that witnessed insignificant slight increase by 2%. The July 2020 prices are higher than the corresponding month last year (July 2019) with sugar exhibiting the highest prices increase by 48%, followed by 22% for wheat flour and non-basmati rice and by 19% for wheat grains.

Consumer Price Index (CPI)
According to data provided by CSO for July 2020, inflation remains stable month-on-month with a 0.6% change (July 451 CPI compared to 448 in June) as prices of most commodities remained stable. The overall annual inflation rate (June 2020) however increased by 8%. Particularly for Food and Non-Alcoholic Beverages, annual inflation has increase by 13% reflected on of the increasing cost of food as the local currency depreciates further. As the impact of the COVID 19 pandemic and ongoing conflicts are continuing to destabilize economies and reducing foreign direct investments, it is expected that the inflation will continue to increase of the coming months.

MONTHLY MARKET MONITORING BULLETIN
July, 2020 (#60)
The national average exchange rate (buying) remained stable compared to previous month settling at 671 YER/USD. However unofficial rate in the southern governorates remained much higher than the rate in northern governorates by 22% (745 YER vs 619 YER/USD). By governorates, Lahj, Al Dhale’e, Hadramaut, Al Maharah and Marib of the southern governorates recorded the highest at 755 YER/USD, 752 YER/USD, 749 YER/USD, 745 YER/USD and 743/USD respectively. In Taiz of the northern governorates recorded the highest of 694 YER/USD.

Despite the current fuel crises and continued depreciation of local currency value against foreign currencies, the national average cost of Minimum/Survival Food Basket (MFB) in July was 42,500 YER (Eqv. to 63 USD). Overall MFB data in July revealed that MFB cost in the southern governorates remained much higher by 26% compared to the northern governorates (48,422 YER vs 38,385 YER). Others drivers include deteriorating insecurity situation, rapid depreciation of local currency foreign currencies, reduction in food imports and impact of COVID-19 remained the major factors that influenced this sharp price differences.

Governorates of Socotra, Lahj and Aden recorded highest MFB cost of 53,500 YER, 52,090 and 51,477 respectively. It should be mentioned that, the situation in Socotra are being influenced currently by the seasonal windy season (June – September) which considered severe monsoon season that prevented arrivals of any food imports via its sea port during July as well as the preventative measures of COVID-19 that caused supply chain disruption and isolated the Island from external supply.

In July, An estimated 529,034 MT of various food items (wheat grains, wheat flour, sugar, rice, milk and cooking oil) were imported through Aden, Al Hudaydah, Al Salif, maritime seaports as well as land ports of Shahin/Al Maharah and Wadieah/Hadramaut. Wheat grains, sugar and rice continued to be the major food imports at 50 percent, 30 percent and 8 percent, respectively. Of the total imports, Hodeida and Al Salif constitute the largest share of imports at (345,149 MT 65 percent), followed by Aden, (321,056 MT 34 percent), of basic food commodities. Overall imports for humanitarian assistance of 29,630 MT (9 percent) came through Al Hudaydah and Al Salif ports and 64,000 MT (36 percent) through Aden port – mainly of Wheat grains, Rice and Wheat Flour in that order. In the meantime, accumulative total food imports for the period of (January – July, 2020, 2,946,934 MT) is lower than the corresponding period in 2019 (3,798,549 MT) by 22%. In Socotra point of view, during the period of (February – June, 2020) , accumulative total food imports doesn’t exceeded , 2,727 MT, mainly wheat flour (1,181 MT,43%), wheat grains (650 MT,23%), sugar (425 MT, 15.6%), rice (395 MT,14.5%) and less than (76 MT,3%) for milk and cooking oil . In this connection, and in addition to the supply chain disruption caused by preventive measures of COVID-19, the situation in Socotra would goes further worse as it is being currently influenced by the seasonal strong wind (June – September) which considered severe monsoon season that would be a harder for receiving of any additional food imports via its sea port during this period. This might raise an issue of the available food stocks and its associated implications on the food security in the Socotra Archipelago.

**MINIMUM / SURVIVAL FOOD BASKET**

**FOOD IMPORTS COMMODITIES (SEA/LAND) PORTS**
prevented arrivals of any food imports via its sea port during July as well as the preventive measures of COVID-19 that caused supply chain disruption. Despite the current fuel crises and continued depreciation of local currency value against foreign currencies, the national average cost of Minimum/maximum for the corresponding period in 2019 (3,798,549 MT) by (January – July, 2020, 2,946,934 MT) is lower than accumulative total food imports for the period of through Aden port – mainly of Wheat grains, Rice, and Barley. Overall imports for humanitarian assistance of 29,630 MT (9 percent) came through Al Hudaydah Port. Wheat grains, sugar and rice continued to be the main imports. In Socotra point of view, during the period of (February – June, 2020) accumulative total food imports doesn't exceeded 22%, In July, 2020, National average food prices as follows:

**Average Retail Price of Wheat(Grains&Flour), Sugar and Rice (YER/KG)**

- **Sorghum:** UR: -4% 6M: 3% 1M: 1% 1Y: 0% 3M: 2% PC: 135%
- **Maize:** UR: -13% 6M: 5% 1M: 1% 1Y: 5% 3M: 1% PC: 173%
- **Millet:** UR: -4% 6M: 3% 1M: 1% 1Y: 0% 3M: 2% PC: 135%
- **Barley:** UR: -1% 6M: 3% 1M: 1% 1Y: 5% 3M: 1% PC: 173%

**Imported Commodities**

- **Wheat Grain:** UR: -3% 6M: 12% 1M: 2% 1Y: 19% 3M: 5% PC: 143%
- **Wheat Flour:** UR: -1% 6M: 11% 1M: 1% 1Y: 22% 3M: 7% PC: 111%
- **Sugar:** UR: -4% 6M: 24% 1M: 3% 1Y: 48% 3M: 3% PC: 138%
- **Basmati Rice:** UR: -1% 6M: 7% 1M: 1% 1Y: 11% 3M: 2% PC: 143%
- **Non-Basmati Rice:** UR: -2% 6M: 13% 1M: 2% 1Y: 22% 3M: 3% PC: 144%
- **Imported Cooking Oil:** UR: -2% 6M: 12% 1M: 2% 1Y: 19% 3M: 5% PC: 143%
- **Beans:** UR: 7% 6M: 11% 1M: 1% 1Y: 7% 3M: 2% PC: 143%

**Fuel**

- **Petrol:** UR: -7% 6M: 18% 1M: 1% 1Y: 11% 3M: 6% PC: 188%
- **Diesel:** UR: -4% 6M: 16% 1M: 1% 1Y: 19% 3M: 4% PC: 131%
- **Cooking Gas (Cylinder):** UR: -15% 6M: 15% 1M: 6% 1Y: 26% 3M: 7% PC: 188%

Market Monitoring Bulletin
July, 2020 (#60)
Heavy and continuous rains in July, led to short supply of vegetable in the local markets. Most farmers were unable to harvest as well as timely transporting the produce to the local markets. The low supply led to increases in the retail prices for most of the vegetables apart from Chilly. Tomatoes had highest price increase of 29%, followed by Okra at 12% increase, 10% for Potatoes and 6% green pepper.

Following the same trend as vegetables, the national average prices of fruits went up in July. Mango had the highest increase by 17% followed by Grapes by 3%. National monthly average retail prices of Grapes recorded the highest at 1,081 YER / KG as the season started followed by Pomegranate at 908 YER/KG. Among all monitored fruits products, only Bananas are available in all seasons and across the monitored local markets. Its retail price in July almost remained stable compared to June. However, supply and prices of these products mainly affected by seasonal factors.
The improved grazing areas and availability of forage that coupled with advent of Eid Al Adha (religious event of sacrificial animals) led to improvement of the livestock prices in July compared to previous month. The national monthly average of all monitored categories (Sheep & Goats) increased equally by 9% for Sheep 6 and 12 Months – old, and Goat 12 Months - old, while the least increase recorded by 7% for the Goat 6 months – old category. At the national level the monthly average retail price of the single head of Goats (12 months old) in July recorded the highest at 77,936 YER followed by 76,891 YER for Sheep (12 months old). Among the governors, active demands in Hajjah, Al Maharah, Marib, and Ibb governorates made the highest price increase in July compared to June. However, due to the current constraints related to limited access, cost of transportation and other related to the ongoing crises, the livestock owners’ income greatly affected. Furthermore, the high prices of the livestock inputs, limited veterinary services due to ongoing crises which is exacerbated by negative impact on the livestock production as well as the breeders’ livelihoods.

**LIVESTOCK**  
**National Average Prices of Animals.**

### Sheep (6M) 
- **[HEAD]**  
- **55,900**  
- **UR :** -12%  
- **6M :** 11%  
- **1M :** 9%  
- **3M :** 14%  

### Sheep (12M)  
- **76,900**  
- **UR :** 6%  
- **6M :** 10%  
- **1M :** 9%  
- **3M :** 13%  

### Chicken  
- **2,300**  
- **UR :** 2%  
- **6M :** 3%  
- **1M :** 4%  
- **3M :** 2%  

### Goat (6M)  
- **56,500**  
- **UR :** 7%  
- **6M :** 7%  
- **1M :** 1%  
- **3M :** 9%  

### Goat (12M)  
- **77,900**  
- **UR :** 5%  
- **6M :** 8%  
- **1M :** 9%  
- **3M :** 11%  

In July, apart from beef and yoghurt (national average prices unchanged), all other monitored animal products showed higher price increase compared to June. Local cow milk recorded the highest price increase by 16%, followed by 3% for Eggs, and equally by 1% for Chicken meat and Mutton compared to previous month. Monthly average retail price of Mutton recorded the highest at 6,108 YER / KG, followed by 5,482 YER / KG for Beef, 1,978 YER / KG of Chicken meat and 1,619 YER / Pack of 30 eggs. However, among many other factors, the situation of these products’ prices was influenced by the current fuel crises that disturb the supply chain as well as increased cost of transportation as the price of Eggs and Chicken depended on the distance of the poultry farms from the main markets.

**ANIMAL PRODUCTS**  
**National Average Retail Prices of Animal Products.**

### Beef  
- **5,482**  
- **UR :** -3%  
- **6M :** 8%  
- **1M :** 0%  
- **3M :** 4%  

### Mutton  
- **6,108**  
- **UR :** -1%  
- **6M :** 11%  
- **1M :** 5%  
- **3M :** 1%  

### Local Cow’s Milk  
- **719**  
- **UR :** -10%  
- **6M :** 19%  
- **1M :** 22%  
- **3M :** -4%  

### Yoghurt  
- **389**  
- **UR :** -2%  
- **6M :** 14%  
- **1M :** 0%  
- **3M :** 10%  

### Chicken Meat  
- **1,978**  
- **UR :** 2%  
- **6M :** 4%  
- **1M :** 1%  
- **3M :** 5%  

### Eggs  
- **1,619**  
- **UR :** -2%  
- **6M :** -5%  
- **1M :** 3%  
- **3M :** -9%  

**FISH**  
**National Average Retail Prices of Fish.**

In addition to the ongoing outbreak of COVID-19’ preventive measures includes movement restriction on the fishing activities as well as its trade between governorates, the onset of the seasonal winds which is known to the fishermen as (winds of the northern season) are blowing every year in this period (June- July-August), the ongoing conflict limited the area of traditional fishing activities. Therefore, and apart from Jahsh, July national average retail prices recorded an increase by 6% for Thamad type, followed by 5% for Sakhla, and by 3% for Bagha compared to June. Continued to raise sharply almost in all monitored markets. However, the monthly average retail prices of Sakhla fish type continued for several months as the most expensive across all targeted governorates and to have the highest at 5,004 YER / KG followed by 3,233 YER / KG for Thamad, 2,924 YER/Kg for Jahsh, while Bagha continued as the cheapest type at least retail price of 1,208 YER/KG.
### MARKET MONITORING BULLETIN

#### July, 2020 (#60)

**COMMODITIES’ PRICES AT GOVERNORATE LEVEL**

<table>
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<tr>
<th>Commodity</th>
<th>Governorate</th>
<th>Unofficial Exchange Rate</th>
<th>Sorghum</th>
<th>Millet</th>
<th>Maize</th>
<th>Barley</th>
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<th>Tomato</th>
<th>Potato</th>
<th>Chilly</th>
<th>Okra</th>
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* *Sana’a City and its environs.*

- Apart from shortages of wheat flour in Socotra, Aden, Abyan and Adhalee, availability of the rest of imported food commodities remained stable in all governorates.

- Despite the most promising rainy seasons, number of limitations are negatively affecting the expected production. Where, in addition to the current fuel crises, Desert Locust waves, the ongoing agricultural season is continued facing the scarcity as well as price increase of essential inputs. Among the governorates, essential inputs were totally unavailable in Raymah as no demands due to the mountainous and agriculture-based nature. Similarly, in Socotra and partially in Al Dhale’e and most others of governorates. Amanat Al Asimah, Ibb, Marib, Sa’adah and Dhamar witnessed better situation of inputs availability. The prices remained as of previous month in Marib and varied widely across the rest governorates in particular for vegetables seeds and chemical fertilizers that exceeded 200% increase in Al Hudaydah for Tomato seeds, by 185% for Onion seeds in Lahj, 95% in Hadramaut (Valley). Taiz and Amanat Al Asimah Sana’a recorded the highest price increase for Urea by 28% and 24% respectively. Okra seeds in Abyan, Al Maharah, Dhamar and Shabwah further increased in July and recorded 44%, 37%, 26% and 15% in that order.

- At the time of reporting, prices of imported basic food commodities started to show an increased trend. Southern governorates recorded the highest price increase. Where Lahj and Al Maharah recorded the highest sharp increase for Wheat grains by 18% and 6% respectively. Similarly, for Wheat flour, it increased almost across the targeted governorates. Off which, Hadramaut (Coast) and Al Maharah recorded the highest sharp increase by 10%, and 7% respectively. Locally processed cooking oil in Lahj, Al Dhale’e and Amran recorded the highest in July by 17%, 13% and 10% respectively.
### Commodity Prices at Governorate Level

<table>
<thead>
<tr>
<th>Commodity</th>
<th>Imported Commodities</th>
<th>Livestock</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Wheat Flour</td>
<td>Wheat Grains</td>
</tr>
<tr>
<td>Abyan</td>
<td>363</td>
<td>333</td>
</tr>
<tr>
<td>Aden</td>
<td>406</td>
<td>354</td>
</tr>
<tr>
<td>Al Bayda</td>
<td>293</td>
<td>268</td>
</tr>
<tr>
<td>Al Dhale’e</td>
<td>380</td>
<td>300</td>
</tr>
<tr>
<td>Al Hudaydah</td>
<td>274</td>
<td>245</td>
</tr>
<tr>
<td>Al Jawf</td>
<td>283</td>
<td>299</td>
</tr>
<tr>
<td>Al Maharah</td>
<td>353</td>
<td>356</td>
</tr>
<tr>
<td>Al Mahwit</td>
<td>300</td>
<td>230</td>
</tr>
<tr>
<td>Amanat Al Asimah*</td>
<td>263</td>
<td>263</td>
</tr>
<tr>
<td>Amran</td>
<td>300</td>
<td>245</td>
</tr>
<tr>
<td>Dhamar</td>
<td>300</td>
<td>282</td>
</tr>
<tr>
<td>Hadramaut (Coast)</td>
<td>342</td>
<td>319</td>
</tr>
<tr>
<td>Hadramaut (Valley)</td>
<td>316</td>
<td>318</td>
</tr>
<tr>
<td>Hajjah</td>
<td>317</td>
<td>278</td>
</tr>
<tr>
<td>Ibb</td>
<td>323</td>
<td>302</td>
</tr>
<tr>
<td>Lahj</td>
<td>412</td>
<td>411</td>
</tr>
<tr>
<td>Marib</td>
<td>284</td>
<td>261</td>
</tr>
<tr>
<td>Raymah</td>
<td>296</td>
<td>255</td>
</tr>
<tr>
<td>Sa’adah</td>
<td>272</td>
<td>248</td>
</tr>
<tr>
<td>Shabwah</td>
<td>398</td>
<td>350</td>
</tr>
<tr>
<td>Socotra</td>
<td>400</td>
<td>270</td>
</tr>
<tr>
<td>Taizz</td>
<td>363</td>
<td>341</td>
</tr>
</tbody>
</table>

* Sana’a City and its environs.

Among the governorates, Al Bayda, Dhamar, Abyan, Ibb and Taiz of the northern governorates were the most affected with the current fuel crisis. (Mainly Diesel and Petrol). Accordingly, Diesel prices went up sharply by 50%, 25% 24% and 21% in that order. Similarly, Petrol retail prices followed the same trend and increased sharply by 78% in Abyan, 53% in Al Bayda, 36% in Dhamar and by above 20% in Hadramout, Lahj, Shabwah and Taiz. At the same time cooking gas, exceeded 100% increase in Al Dhale’e, and by above 20% in Sa’adah and Amran.

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