



MONTHLY MARKET MONITORING BULLETIN

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Background

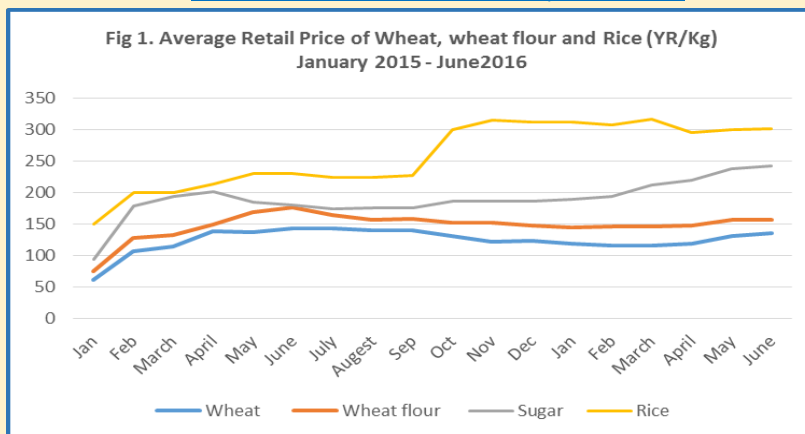
The Monthly Market Monitoring Bulletin provides monthly market prices summary on the targeted Governorate markets. It also provides and allows the users to compare the current prices with the previous month and the pre-crisis (Feb 2015) average. The market prices data and information is collected from seven Governorates targeted by FSIS Programme through the Governorate Focal Units (GFU) and FSTS in Sanaa city. The prices are collected from Hodeidah, Hajjah, Dhamar, Hadramout, Lahej, Taiz and Sanaa city markets. The prices are collected from 3 representative market centers and the average is calculated for each location.



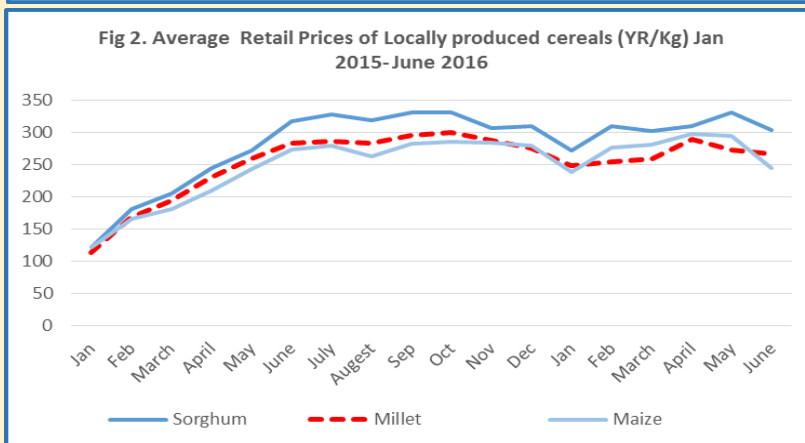
Highlights

- Sugar is the most expensive commodity in June 2016. The price was 57.29% higher in Sana'a city, 50.98% in Dhamar, 65.10% in Taiz, 35.19% in Hadramout and 31.14 % in Hodeidah compared to the pre-crisis era in February 2015
- Prices of wheat and wheat flour were generally more stable in Taiz and Sana'a city when compared to May 2016. Prices of the same commodity declined between 4 and 7 percent in Hajjah and Hodeidah and increased between 7 and 28% in Dhamar, Lahej and Hadramout. The price fluctuation could be attributed to the exchange rate of Yemeni riyal against the US dollar.
- Supply and availability of cereals and vegetable seeds is running low while the planting season approaching. Shortage of agricultural supplies as well the high costs of inputs in Taiz ,Dhamar and Lahej , could have a significant negative impact on food production during the coming agriculture season.
- Fuel imports remained below the national requirements and there is scarcity across all governorates. Thus prices remained significantly above pre-crisis levels in February 2015 , where diesel and petrol increased by 26.67% and 101.11% in Sana'a , 22.78% and 127.22% in Hodeidah, 20.56% and 94.72% in Hajjah , 22.22% and 118.6% in Dhamar, 11.63% and 83.45% in Lahej and by 88.89% and 223.61% in Taiz
- There was a limited fish production and supply to the local markets of Hadramout because of the advent of the autumn season which abound waves that limits the entry of fishermen into the sea resulting poor supply and higher prices in all types of fish ranging from 13.8 % to above 46%.
- The retail prices of tomatoes sharply declined by 40% in Sana'a city and Dhamar, 26% in Hodeidah, 37.97% in Hajjah due to the increased supply of tomatoes compared to the previous month, while there was limited supply to the markets in Taiz, which increased the prices by 20.83%.
- Swarms of locusts appeared in the desert of Hadramout in particular the areas of Thamoud and Al Abr and have now spread to Sert Valley and then to the most parts of the Wadi which would have impact on the locally produced crops and vegetables.

Retail Market Prices and Trends of Key commodities



Cereals	June 2016 price	Percentage change	
		1 Month	Pre-crisis ¹
Wheat	137.3	2.76%	27.86%
Wheat flour	157.78	0.68%	27.98%
Sugar	243.06	2.2.77%	37.01%
Rice	302.31	0.78%	51.15%
Veg oil	484.84	0.74%	40.29%
Faba-Beans	250.83	-0.13%	NA
Beans	389.31	1.24%	30.20%
Lentils	450.83	-2.81%	32.13%



Cereals	June 2016 price	Percentage change	
		1 Month	Pre-crisis
Sorghum	303.202	6.73%	67.15%
Millet	269.64	-2.39%	61.08%
Maize	243.09	-15.58%	46.97%
Barley	273.82	-1.49%	80.13%

¹ Pre-crisis prices refer to the February 2015 prices prior to the escalation of the conflict in Yemen.



Monthly Average Prices of Locally Produced Commodities

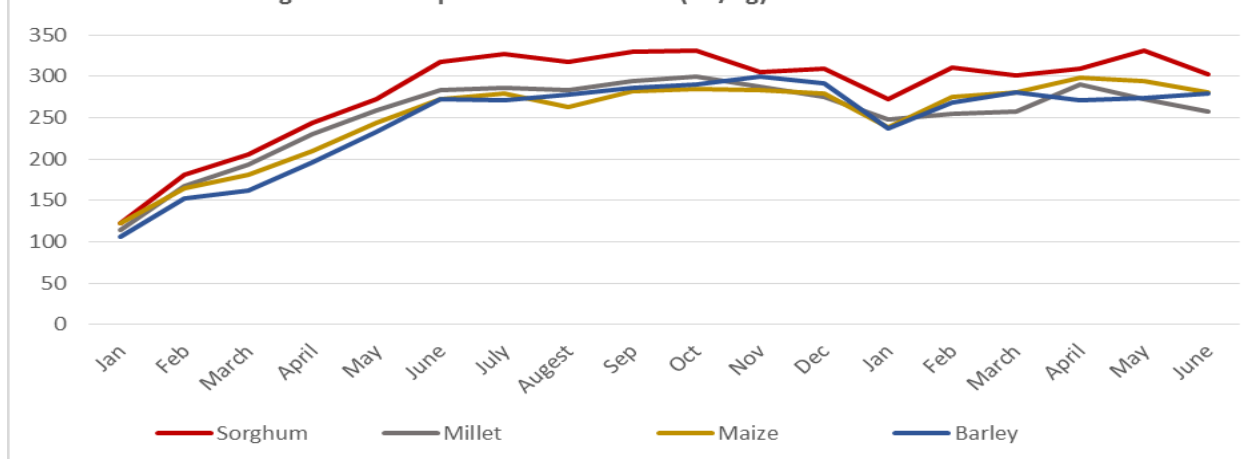
Cereals

Table 3: Average price of locally produced cereals (YR/Kg June . 2016 and % change over 1 month and 1 year

Item	% change	Sanaa city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj	Taiz
Sorghum	June	283	242	267	248	383	400	300
	1 M	-17.62%	-6.45%	-2.44%	-2.93%	-6.09%	-11.11%	NA
	Pre-crisis	56.94%	90.29%	56.86%	37.96%	53.30%	NA	50.00%
Millet	June	180	192	233	245	350	400	288
	1 M	-16.60%	17.95%	-13.85%	0.00%	3.07%	0.00%	-4.17%
	Pre-crisis	5.88%	50.92%	37.25%	22.50%	105.88%	NA	43.75%
Maize	June	263	NA	275	230	296	400	238
	1 M	-15.05%	NA	-1.49%	1.47%	2.90%	0.00%	-5.00%
	Pre-crisis	54.90%	NA	52.78%	35.29%	64.35%	NA	18.75%
Barley	June	231	300	300	212	287	296	292
	1 M	-7.97%	0.00%	-7.69%	-6.96%	-1.97%	18.33%	-2.78%
	Pre-crisis	64.88%	130.77%	100.00%	32.29%	59.21%	NA	94.44%

- **Sorghum:** The average price of sorghum in June 2016 ranged from 283 YR in Sana'a city to 400 YR in Lahej. Average prices showed declining trend ranging from 17.62% in Sana'a city, 11.11% in Lahej, and 2.44% in Hajjah compared to May 2016. Moreover, the increase in prices of sorghum was evident in all targeted governorates when compared to the pre-crisis era by 90.29% in Hodeidah , above 50% in Sana'a city Taiz and Hajjah
- **Millet:** The average price of millet remained stable when compared to the previous month, in Dhamar and Lahej, and slightly increased in Hadramout, while it declined in Sana'a city, Hajjah and Taiz, it increased by around 18% in Hodeidah. The increase in prices could be related to less supply to the markets and the big demand for millet in the holy month of Ramadan.
- **Maize:** The average price of maize in June 2016 ranged between 230 YR in Dhamar and 400 YR in Lahej , it declined by 5% and 15.05% in Taiz and Sana'a city respectively compared to May 2016 and slightly increased by 1.47% and 2.90% in Dhamar and Hadramout
- **Barley:** The average price of Barley in June 2016 ranged from 212 YR in Dhamar to 300 YR in Hodeidah and Hajjah. The average price of barley compared to May2016 showed a slight decrease in Sana'a city (7.97%), Hajjah (7.69%) and Dhamar (6.96%). On the other hand, average prices in Lahej showed a slight increase in June 2016 by 18.33% compared to May 2016 of the same year.
- Among other factors, the seasonality and the supply and demand play major role in the fluctuation of the average prices of locally produced crops.

Figure: 3 Retail price of local cereals (YR/Kg) - Jan 2015 - June 2016



Vegetables

Table 4: Average Prices of vegetables (YR/Kg) June.2016 – and the change % previous month

Commodities	Month	Sanaa city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj	Taiz
Onion	June	200	192	208	196	113	150	188
	1 M	0.00%	39.39%	-5.66%	5.62%	10.66%	50.00%	25.00%
Tomato	June	375	233	204	202	292	233	242
	1 M	-40.00%	-26.32%	-37.97%	-39.50%	6.06%	5.66%	20.83%
Potato	June	283	238	208	235	267	246	250
	1 M	-10.29%	11.76%	-23.08%	2.55%	-4.48%	-4.84%	0.00%
Pepper	June	375	392	404	429	750	467	696
	1 M	-10.89%	14.63%	15.48%	-5.94%	18.42%	-11.11%	-0.60%
Chilly	June	458	458	558	467	850	579	1650
	1 M	14.58%	14.58%	15.52%	7.69%	41.67%	69.51%	-2.94%

Onion: Compared to the previous month, the average retail prices of onion in Lahej increased sharply by 50% in June 2016 and by 39.39% in Hodeidah and by 25% in Taiz, while a slight decrease was observed in Hajjah. Prices of onions did not change in Sana'a city. The increase in average price of onions could be attributed to the big demand and shortage of the product in local markets during the month of Ramadan.

Tomatoes & Potatoes: The availability of these commodities and good production contributed for sharp decline on the retail prices of tomatoes. The prices dropped by 40% in Dhamar and Sana'a city, and by 37.97% in Hajjah, while it has increased in Taiz by 20.83%

and by 5.66% and 6.06% in Lahej and Hadramout respectively. Similarly, the average prices of potatoes showed a declining trend in almost in all targeted governorates except in Hodeidah compared to the previous month.

Pepper & Chilly: The average prices of pepper and chilly in June 2016 were higher than May in Hodeidah, Hajjah and Hadramout, ranging from 14 to 18 percent. The highest average price of chilly was recorded in Lahej by around 70% followed by Hadramout by 41.67% compared to May 2016. The increase in the average prices is mainly seasonal. The prices of both commodities slightly decreased in Taiz in June 2016 compared to May of the same year.



Imported food commodities

Table 5: Average price of Imported Food Commodities (YR/Kg) June & % changes (previous month and Pre-crisis)								
	% change	Governorates						
		Sanaa city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj	Taiz
Wheat	June	145	120	105	150	154	137	150
	1 M	0.58%	-7.69%	-1.02%	11.11%	11.65%	3.80%	0.00%
	Pre-crisis	11.54%	20.00%	36.90%	36.36%	28.47%	NA	NA
Wheat flour	June	156	150	153	172	157	159	200
	1 M	-0.53%	-4.26%	-6.60%	7.85%	1.79%	7.30%	0.00%
	Pre-crisis	19.87%	25.00%	53.33%	14.44%	11.90%	NA	33.33%
Sugar	June	252	249	229	257	243	228	264
	1 M	1.89%	-0.66%	1.85%	5.12%	1.79%	-1.08%	5.67%
	Pre-crisis	57.29%	31.14%	15.74%	50.98%	11.90%	NA	65.10%
Rice 1/ Basmati	June	410	373	392	450	353	404	398
	1 M	3.58%	1.01%	-2.08%	0.00%	0.95%	1.04%	-0.63%
	Pre-crisis	NA	NA	NA	NA	NA	NA	32.50%
Rice2/ non*	June	207	278	229	207	175	150	250
	1 M	0.81%	6.71%	-6.78%	0.81%	2.44%	1.69%	0.00%
	Pre-crisis	37.78%	85.56%	52.78%	37.78%	16.67%	NA	25.00%
Veg. oil (import)	June	617	492	713	629	363	600	829
	1 M	-1.46%	4.42%	-4.47%	-0.59%	15.10%	7.46%	10.56%
	Pre-crisis	NA	NA	NA	NA	NA	NA	84.26%
Veg. oil (local)**	June	408	395	421	446	417	317	442
	1 M	0.72%	0.21%	-12.17%	2.59%	4.21%	1.60%	-1.85%
	Pre-crisis	25.64%	14.49%	8.46%	6.25%	66.67%	NA	13.54%
Faba Bean	June	257	296	300	307	346	NA	350
	1 M	3.01%	10.94%	-10.00%	0.00%	-1.52%	NA	-12.50%
	Pre-crisis	NA	NA	NA	NA	NA	NA	16.67%
Beans	June	356	401	371	400	350	458	442
	1 M	0.71%	4.57%	-4.30%	0.00%	9.20%	-0.90%	-11.67%
	Pre-crisis	16.67%	24.48%	16.61%	33.33%	40.00%	NA	10.42%
Lentils	June	418	492	321	458	517	500	513
	1 M	-2.15%	-0.84%	-22.22%	0.00%	4.55%	0.84%	-6.82%
	Pre-crisis	18.27%	63.89%	-20.39%	30.95%	106.67%	NA	28.13%

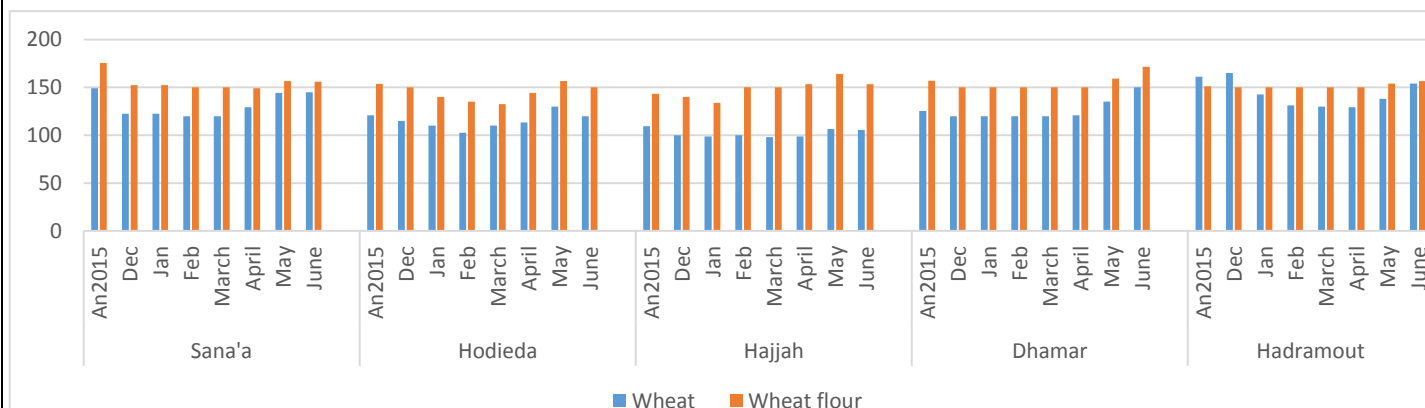
- * Represent average prices of non-Basmati rice's in the target markets.
- ** Average prices locally produced oil price for comparison with the imported ones
- The average price of wheat and wheat flour in June remained stable in Taiz compared to May 2016. While it increased slightly in Hadramout, Dhamar and Lahej markets.
- There is a significant increase in the prices of wheat and wheat flour in all governorates when compared to the pre-crisis era ranging from 11% to above 50%
- The average retail prices of sugar and rice were more or less stable in June 2016 when compared to the previous month with slight fluctuation from one governorate to another.
- A slight increase in the average prices of the imported cooking oil was recorded during June in Taiz and Hadramout ranging between 11 and 15 %.
- Pulses products (Faba beans, other beans and lentil) in June showed a declining trend almost in all target governorates, where it dropped by 6 to 12 in Taiz, lentil showed a decline price (-22%) in Hajjah.

Fisheries

Table 6: Average price of common fish types (YR/Kg), June.2016 – and the change % previous month and pre-crisis.					
Governorates	% change	Common Fish Types			
		Thamad	Sakhla	Bagha	Jahsh
Sanaa city	June	1571	1667	492	1283
	1 M	4.72%	-9.71%	2.61%	1.32%
Hodeidah	June	800	1171	417	975
	1 M	-36.00%	-10.79%	-2.91%	-12.03%
Hajjah	June	1289	1425	408	1450
	1 M	24.73%	12.50%	46.27%	13.73%
Dhamar	June	1600	2467	633	1733
	1 M	6.67%	19.35%	5.56%	-5.02%
Hadramout	June	1425	2217	550	1017
	1 M	46.15%	13.19%	13.76%	7.00%
Lahj	June	1800	NA	517	804
	1 M	29.34%	NA	31.91%	10.92%
Taiz	June	1792	2017	NA	1972
	1 M	19.44%	0.83%	NA	-10.35%

- The average retail price of Tamad in June 2016 varied in all targeted governorates, Prices of Tamad ranged from 800 YR in Hodeidah to 1800 YR in Lahej
- The average retail price of all types of fishes in June 2016, were higher than May in Hadramout, Lahej and Hajjah. The increase ranged from 13.73% for Jahsh in Hajjah, to above 46% for Tamad in Hadramout and Bagha in Hajjah.
- All types of fish showed a decrease in average prices in June 2016 compared to May 2016 in Hodeidah by 36% for Tamad, 12.3% for Jahsh, and 10.79% for Sakhla. The reason for this decrease is mainly seasonal.
- The Bagha type of fish was not available in Taiz in June 2016 and the previous month, the same trend was observed for the Sakhla in Lahej
- The average retail price of Bagha was recorded to be the cheapest, almost in all targeted governorates.

Fig. 4 Price trends of the Imported wheat and Wheat flour (Dec 2015 to May 2016)





Livestock and livestock products

Table 7: Average price of live animal (YR/Head)) June.2016 – and % change (previous month and pre-crises).

Item	% change	Sanaa city	Hodeidah	Hajjah	Dhamar	Hadramout	Lahej	Taiz
Sheep/6 month	June	27500	13167	14688	17625	18792	24000	22208
	1 M	11.30%	-0.63%	0.43%	-11.88%	1.58%	19.01	NA
Sheep 12 month	June	33625	21333	24938	27500	29542	29667	26158
	1 M	12.40%	1.59%	-5.45%	-8.68%	6.14%	1.86%	NA
Goat /6 month	June	27125	14833	13000	18333	24375	25833	NA
	1 M	2.52%	-9.64%	-2.80%	-12.70%	7.34%	14.18%	NA
Goat/12 month	June	31500	21667	24188	28333	34792	31583	NA
	1 M	-2.58%	-9.09%	-0.51%	-9.91%	4.64%	5.13%	NA
Live chicken	June	1367	1008	1271	1400	1250	1000	NA
	1 M	17.14%	3.81%	5.92%	7.69%	9.84%	-1.67	NA

- Due to the Eid festival, the average monthly prices of six-month-old sheep increased by 11.30% in Sana'a city, by 19.01 in Lahej and increased slightly by less than 2% in Hadramout. While it shows a decline by 11.88% in Dhamar and by less than 1% in Hodeidah.
- The average prices of 12-month old sheep followed the same increasing trend in Sana'a city by 12.40%, and 6.14% in Hadramout and 1.59% in Hodeidah compared to May 2016.
- The average price of Goats in both age groups reflects the fluctuation during June, An increase in average prices was observed for the six-month – old goats by 14.18 in Lahej and by 7.34% in Hadramout, and declined price of the 12-months-aged by 9.09% in Hodeidah and Dhamar.
- Live chicken retail prices showed an increased trend in June compared to May 2016, The retail price increased in all target governorates ranging between 9.84 in Hadramout to 17.14 in Sana'a city, except in Lahej where the price slightly dropped by 1.67%.

Table 8: Average Prices of animal products (YR/Kg)) June.2016 – and % change (previous month and pre-crises).

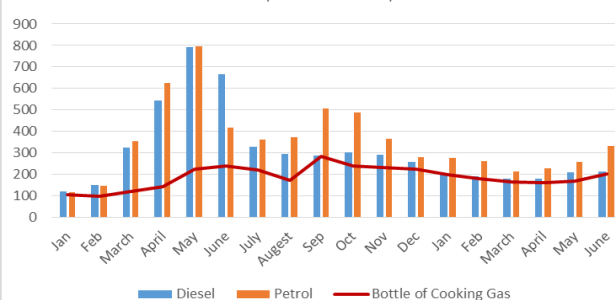
Commodities	change	Sanaa city	Hodaidah	Hajjah	Dhamar	Hadramout	Lahej	Taiz
Beef	June	2000	2333	2558	2663	2963	NA	1967
	1 M	0.00%	-6.67%	9.25%	18.33%	38.60%	NA	9.26%
Mutton	June	2500	2500	2550	2900	2958	2500	2867
	1 M	0.00%	0.00%	4.79%	16.00%	5.03%	0.00%	6.17%
Cow milk local	June	300	400	NA	375	400	NA	343
	1 M	0.00%	0.63%	NA	0.00%	-2.44%	NA	NA
Processed Powered milk	June	1258	1850	2025	1433	1358	2000	1938
	1 M	-3.21%	4.62%	-6.36%	1.18%	13.99%	4.35%	13.97%
Chicken meet	June	800	1100	763	846	704	817	1546
	1 M	1.59%	-0.75%	1.10%	9.14%	4.06%	3.70%	10.42%
Egg (30 eggs)	June	783	842	817	796	883	900	938
	1 M	2.73%	3.59%	7.69%	3.80%	4.43%	10.20%	4.17%

- The average retail price of beef and mutton remained stable in June 2016 when compared to the previous month in Sana'a city, and Lahej.
- The retail price of beef in June 2016 in Hadramout increased by 38.60%, 18.33% in Dhamar and 9.25% in Hajjah while the price of mutton remains stable in Sana'a city, Hodeidah and Lahej compared to May of the same year.
- The 30 eggs pack prices increased in June 2016 in all governorates, reaching up to 10.20% in Lahej, 7.69% in Hajjah and between 2 and 4% in the other governorates.
- Local cow's milk retail price during June remains remained stable, while the processed powder milk increased by 13.99% in Hadramout and Taiz compared to the previous month
- Chicken meat average prices increased in all governorates, ranging from 10.20 in Lahej to 2.73% in Sana'a city.

Table 9 : Average price of fuel (Diesel and Petrol) and Cooking gas and % change (June 2016, previous month and Pre-crisis)

Item	% change	Sanaa city	Hodeidah	Hajjah	Dhamar	Hadramout	Lahej	Taiz
Diesel (YR/LT)	June	190	184	181	183	155	400	283
	1 M	2.10%	-1.78%	-3.77%	-7.17%	10.71%	11.63%	49.12%
	Pre-crisis	26.67%	22.78%	20.56%	22.22%	3.33%	166.67%	88.89%
Petrol (YR/Lt)	June	302	341	292	327	186	554	485
	1 M	17.15%	12.21%	7.52%	26.41%	6.43%	83.45%	7.87%
	Pre-crisis	101.11%	127.22%	94.72%	118.06%	24.17%	269.44%	223.61%
Cooking gas YR/18Kg	June	3892	4317	3467	3892	2333	3925	6483
	1 M	27.95%	29.50%	6.23%	20.21%	-2.78%	31.18%	8.06%
	Pre-crisis	85.32%	187.78%	49.10%	159.44%	55.56%	NA	159.33%

Fig 5. Average Retail Price of Diesel, Petrol and Cooking gas (YR/LT) (Jan.'15- June.'16)



- During June 2016, average prices of the single liter of diesel ranged from 190 YR in Sana'a city to 400YR in Lahej. These average prices of June 2016 were much higher than the average prices of May 2016 in Sana'a city, Hadramout and Lahej. The increase in the average prices of diesel reached the highest level in Taiz by 49.12%, followed by Lahej by 11.63% and Hadramout by 10.71%. However, the average prices of June 2016 are far higher than the average prices of diesel during the pre-crisis era by 166.67% in Lahej and by 88.89% in Taiz.
- The average price of petrol showed a significant increase in June 2016 compared to May 2016 in Lahej by 83.45%, and in other governorates the percentage increase ranged from 7.52% in Hajjah, 17.15% in Sana'a city, 12.21% in Hodeida, and 26.41% in Dhamar
- The average price of 18 liter cooking gas cylinder showed an increased trend in most targeted governorates in June 2016 as compared to May 2016. The increase reached 31.18% in Lahej 29.50% in Hodeidah, 27.95% in Sana'a city. Exception was Hadramout where the average price of the same cylinder decreased by -2.78%. In general, prices of different types of fuel are much higher when compared to the pre-crisis era. where diesel and petrol increased by 26.67% and 101.11% in Sana'a, 22.78% and 127.22% in Hodeidah, 20.56% and 94.72% in Hajjah, 22.22% and 118.6% in Dhamar, 11.63% and 83.45% in Lahej and by 88.89% and 223.61% in Taiz.
- The fluctuation of prices of oil products is mainly related to supply and demand factors. Moreover, the situation witness that there is very limited control of the supply channels and prices which is dominantly maneuvered by the actors in the parallel market.

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Food and Agriculture Organization of the United Nations

