

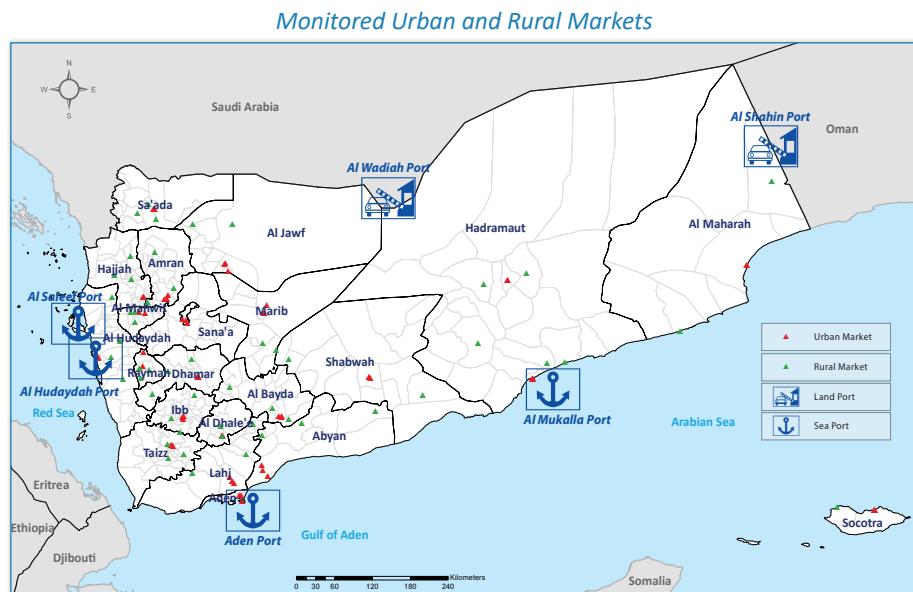
MONTHLY MARKET MONITORING BULLETIN


 August, 2020
#61

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 Dhaleé, Al Bayda, Al Jawf, Dhamar, Hadramaut Coast (Al Mukalla), Hajjah, Al Hudaydah, Ibb, Lahj, Amanat Al Asimah (Sana'a City), Shabwah, Taizz, Al Mahrah, 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 Food Price Trends

The FAO Food Price Index (FFPI) averaged 96.1 points in August 2020, which is 1.8 points (2.0 percent) higher than July and 2.1 points (2.2 percent) higher than the corresponding month last year. Among the major cereals, sorghum, barley and maize prices rose the most. In wheat markets, the benchmark US wheat (No. 2 Hard Red Winter, f.o.b.) averaged USD 221 per ton, remaining nearly stable in August and 9 percent higher than the corresponding month in 2019.

Locally produced Cereals

Apart from wheat and barley grains, which increased by 5 percent and 3 percent respectively, the national average retail prices of all other locally produced cereals remained stable in August compared to the previous three months. However, the national retail price of locally produced wheat grains was YER 577 per kilogram, which is 91 percent higher than a kilogram of imported wheat grains.

Imported Food commodities

At the national level, retail prices of imported cooking oil, sugar and non basmati and basmati rice remained stable compared to the last three months, with a slight price increase not exceeding 3 percent. On the other hand, retail prices of wheat flour and red beans had an increase of 8 percent and 5 percent, respectively, compared to June 2020. August Sugar prices were 45 percent higher compared to August 2019.

Consumer Price Index (CPI)

According the Central Statistical Organization's August report, the monthly inflation rate increased by 1.4 percent to reach 476 CPI in

August compared to 469 CPI in July for food and non-alcoholic beverages. The national overall annual inflation increased in August by 8 percent compared to the corresponding month last year (August 2019). Rapid depreciation of the local currency against foreign currencies accounted for increasing prices of imported food in the monitored local and urban markets countrywide.

Fuel products

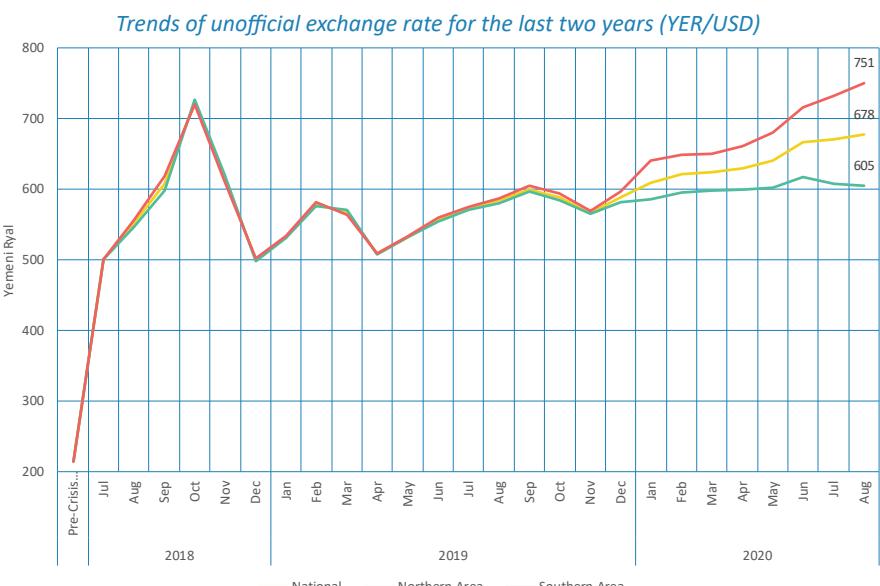
The ongoing fuel crises across the country has led to increased costs of transportation, food preparation and processing, as well as water pumping for irrigation. The price of diesel sharply increased in Socotra, Aden, Al Mahrah, Shabwah, Al Dhale'e and Amran by 25 percent, 19 percent, 17 percent, 15 percent, 12 percent and 11 percent respectively. The retail prices of cooking gas exceeded 70 percent in Socotra, and increased by 15 percent in Sa'adah, Al Jawf and Aden. Nationally, the current average retail prices of petrol, diesel and cooking gas have sharply increased by 70 percent, 52 percent and 14 percent, respectively, compared to the previous three months.

Exchange Rate

The national monthly average of the unofficial exchange rate (buying) of Yemeni Riyals (YER) against US dollars (USD) in August stood at YER 678 per USD 1. The last week of August 2020, USD 1 was exchanging above YER 800 YER in all the southern governorates. In Sana'a and other northern governorates, the unofficial exchange rate slightly increased above YER 600 YER per USD 1. The southern governorates average unofficial exchange rate in August was higher than the northern governorates by 24 percent.

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MINIMUM / SURVIVAL FOOD BASKET



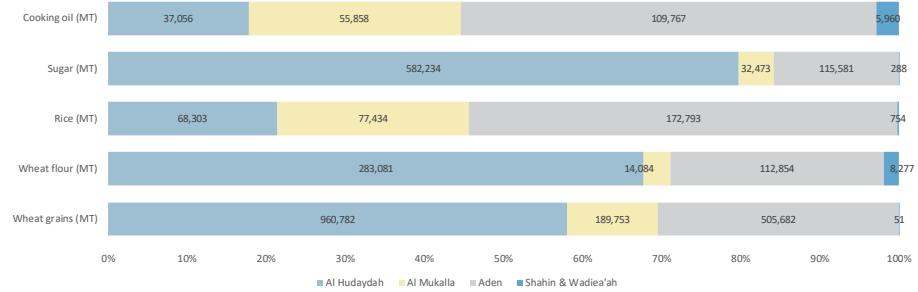
At national level, the average cost of Minimum /survival Food Basket (MFB) in August was 43,050 YER (equivalent to value of 63 USD). Southern governorates recorded an increase of 14 percent above the national average and remained much higher by 27 percent compared to the northern side. The cost of MFB in Socotra, Lahej, Aden and Taiz remained the highest at 56,000 YER, 52,700 YER, 50,850 YER and 50,555 YER respectively compared to previous month.

**Composition of Yemen Minimum/Survival Food Basket for average household of 7 members per month (Prepared and adopted by FSAC partners) : 75Kgs Wheat Flour, 10Kgs Dry Weight Beans (Red Kidney of Beans), 8 Liters Vegetable Cooking Oil (Imported), 2.5 Kgs Sugar and 1Kg Iodized Salt.*

FOOD IMPORTS COMMODITIES (SEA/LAND) PORTS

In August, an estimated 463,454 MT of assorted food commodities including wheat grains, wheat flour, sugar, rice, milk and cooking oil were imported through Aden, Al Hodeida, Al Salif, Mukalla maritime seaports, land ports of Shahin/Al Maharah and Wadieah/Hadramaut.

The overall imports for humanitarian food assistance of 40,000 MT (88 percent) came through Hodeida and Assailef ports and 5,396 MT (12 percent) through Aden port mainly of wheat grains. The accumulative total food imported from January to August 2020, 3,420,914 MT is lower by 15 percent compared to the corresponding period in 2019 with accumulative of 4,047,325 MT of imported assorted food commodities.



The wheat grains, sugar and rice continued to be the major imported food at 65.2 percent, 16 percent and 7.6 percent respectively. Hodeida and Assailef, which recorded the largest entry of imports with receiving 344,603 MT (74 percent), and Aden with 100,649 MT (22 percent) of basic food commodities.

LOCAL CEREALS National Average Retail Prices of Local Cereals.



Sorghum [1KG]

506

UR : -3% 6M : 9%
1M : 1% 1Y : 1%
3M : 4% PC : 148%



Maize [1KG]

534

UR : -18% 6M : 3%
1M : 0% 1Y : 2%
3M : 2% PC : 172%



Millet [1KG]

503

UR : -8% 6M : 1%
1M : -1% 1Y : -3%
3M : 0% PC : 155%

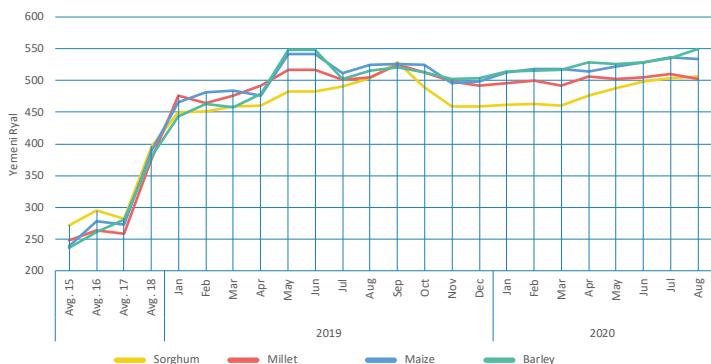


Barley [1KG]

550

UR : -7% 6M : 7%
1M : 3% 1Y : 6%
3M : 5% PC : 240%

Average Retail Price of Local Cereals (YER/KG)



IMPORTED COMMODITIES National Average Retail Prices of Imported Commodities.



Wheat Grain

302

UR : -5% 6M : 11%
1M : 2% 1Y : 20%
3M : 7% PC : 147%



Wheat Flour

333

UR : -4% 6M : 10%
1M : 1% 1Y : 23%
3M : 8% PC : 134%



Sugar

448

UR : -5% 6M : 15%
1M : 0% 1Y : 45%
3M : 3% PC : 137%



Basmati Rice

958

UR : -2% 6M : 6%
1M : 0% 1Y : 10%
3M : 1% PC : 219%



Non-Basmati Rice

513

UR : -3% 6M : 7%
1M : -1% 1Y : 18%
3M : 0% PC : 162%

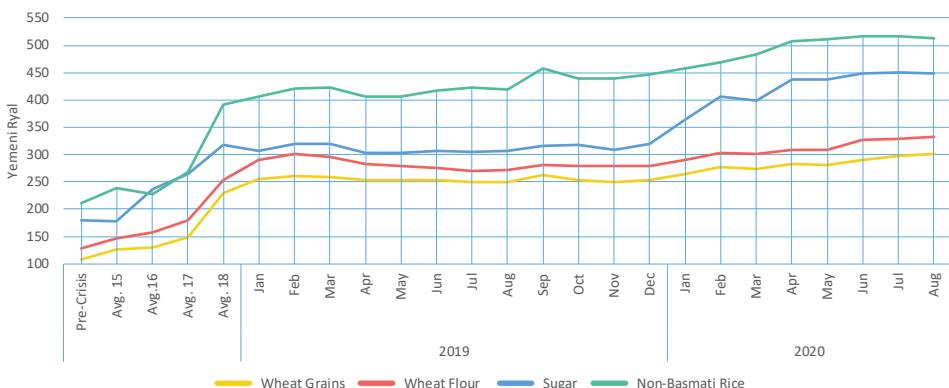


Local Cooking Oil

861

UR : -4% 6M : 12%
1M : 2% 1Y : 18%
3M : 5% PC : 143%

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



FUEL National Average Retail Prices of Fuel.



Petrol

416

UR : -9% 6M : 16%
1M : -4% 1Y : 7%
3M : 70% PC : 177%



Diesel

459

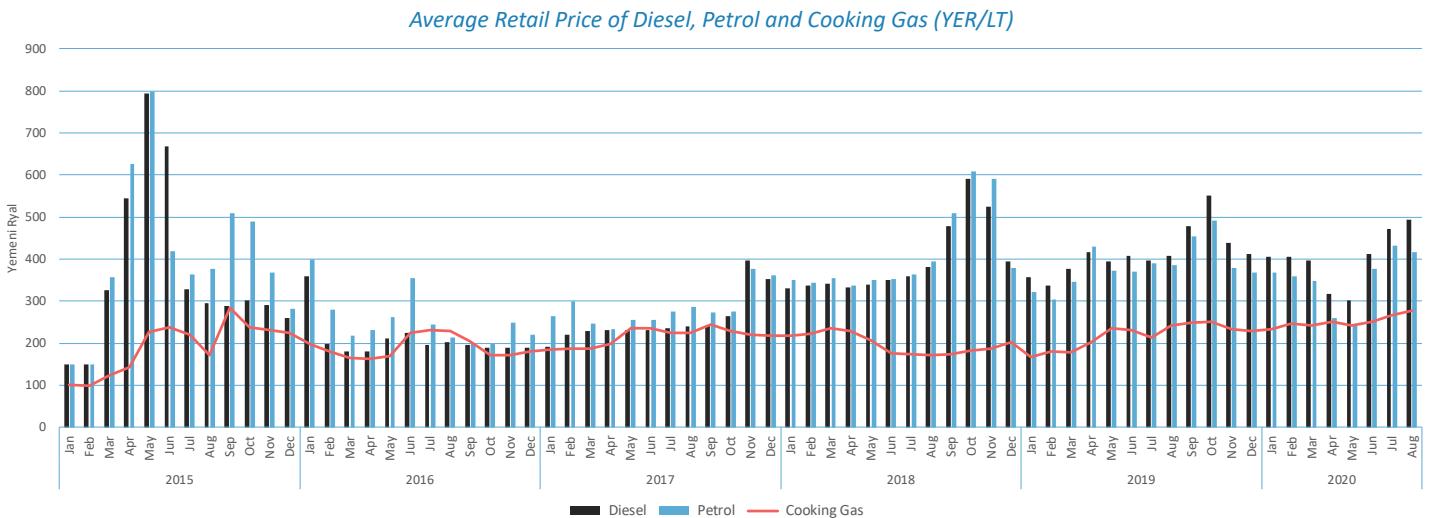
UR : -4% 6M : 13%
1M : -3% 1Y : 12%
3M : 52% PC : 206%



Cooking Gas (Cylinder)

5,543

UR : -10% 6M : 12%
1M : 4% 1Y : 18%
3M : 14% PC : 199%



VEGETABLES National Average Retail Prices of Vegetables.

Onion [1KG]



487

UR : -5% 6M: 2%
1M: 17% 1Y: 23%
3M: 10%

Tomato [1KG]

658

UR : -6% 6M: 176%
1M: 1% 1Y: -4%
3M: 23%

Potato [1KG]



495

UR : 3% 6M: 2%
1M: 7% 1Y: 11%
3M: 15%

Green Pepper [1KG]

791

UR : 0% 6M: -3%
1M: 11% 1Y: -11%
3M: -5%

Chilly Pepper [1KG]



989

UR : -4% 6M: 6%
1M: 0% 1Y: -2%
3M: -6%

Okra [1KG]

1,135

UR : 3% 6M: 29%
1M: -2% 1Y: -30%
3M: 28%

Carrot [1KG]



553

UR : -5% 6M: 20%
1M: 22% 1Y: NA
3M: 24%

Cucumber [1KG]



632

UR : -1% 6M: 3%
1M: 0% 1Y: NA
3M: 13%

The seasonal harvest of the vegetable is ongoing and the fresh products are available in local and urban markets. In August, the retail prices of carrot, green pepper and potato significantly increased by 22 percent, 11 percent and 7 percent compared to July. The significant increase in retail prices of these vegetables is due to high demand of these locally produced vegetables, high transport and irrigation costs driven by fuel crises. The chilly and cucumber prices remained stable in August compared to July. The potential export of onions to the neighboring countries led to significant increase of retail prices of local produced onion by 17 percent in August compared to last month.

The retail prices of the monitored vegetables including okra, chilly, green pepper and tomato recorded in August at 1,134 YER per a kilogram, 989 YER per a kilogram, 791 YER per a kilogram, 658 YER per a kilogram respectively. The prices and farmers' income from vegetable productions are determined by cost of inputs including irrigation cost, seeds and chemical fertilizers. The retail prices of irrigation inputs, seeds and chemical fertilizers in August witnessed increase by 15 percent, 14 percent and 5 percent respectively compared to July.

FRUITS National Average Retail Prices of Fruits.

In August, all monitored varieties fruit were not available in Socotra governorates markets due to main supply routes closure by conflicts, COVID-19 restrictions and monsoon wind sailing restrictions. As the mango production season is ending, the mango fruits are becoming scarcely available in Al Mahweit, Amran and Hajjah governorates markets. As the mango, supply has significantly reduced the retail prices of available mango fruits in the local and urban markets has increased in August by 38 percent compared to July. In August, the retail prices of the banana recorded the highest in history by 5 percent across all the market monitored compared to July month and corresponding month last year. The increment of the prices of banana is August is attributed to fuel crises that elevated the transportation cost for supplying the fruits to the consumers' retail markets. The prices of Pomegranate insignificantly increased 2 percent and the prices of the grapes remain stable compared to July. The average national retail prices of grapes recorded the highest at 1,076 YER per kilogram while mango and Pomegranate at 1,036 YER per a kilogram, and 926 YER per a kilogram.

Banana [1KG]

417



UR : -7% 6M: -3%
1M: 5% 1Y: NA
3M: 0%

Mango [1KG]

1,036



UR : -3% 6M: -11%
1M: 38% 1Y: NA
3M: 32%

Grapes [1KG]

1,076



UR : 0% 6M: 49%
1M: 0% 1Y: NA
3M: 84%

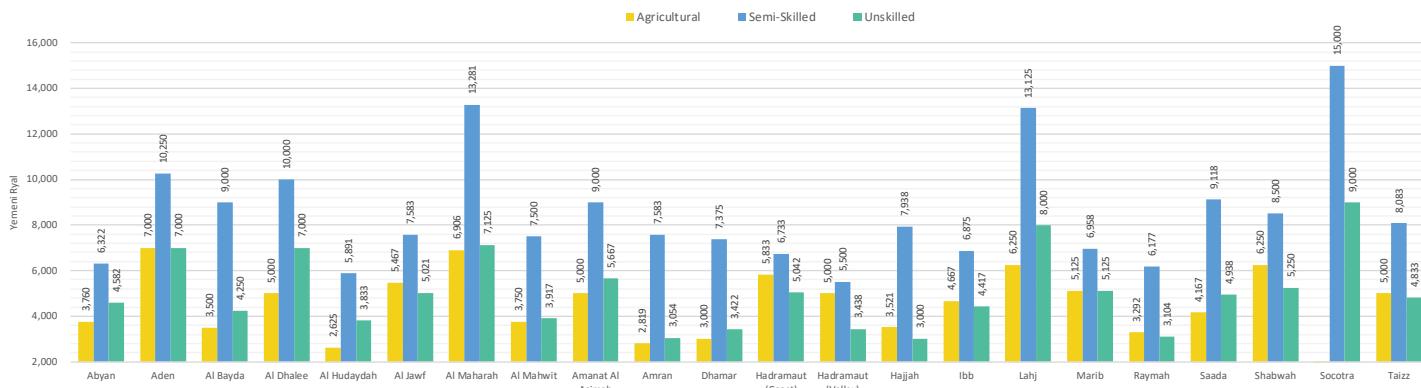
Pomegranate [1KG]

926



UR : 0% 6M: 2%
1M: 2% 1Y: NA
3M: -34%

LABOR MARKET Average Daily Wages by Governorate.



In August, the national average rate of wages witnessed an increase for casual labor by 3 percent while other two categories of unskilled and agricultural labours have insignificantly changed compared to July. The national average daily labor rate of semi-skilled labor category continued to have the highest rate of wages at 8,536 YER per a day, casual labors recorded at 5,046 YER per a day and agricultural labor at 4,663 YER per a day. At governorate level, increased demand with short supply for the semi-skilled workers is controlling the variation in their daily rate. The monthly average rates in Socotra, Al Maharah, Lahej, Al Dhalee and Sa'adah governorates have the highest wages of semi-skilled labors at 15,000 YER per day, 13,281 YER per day, 13,125 YER per day, 10,000 YER per day and 9,118 YER per day respectively. The national average of wages increased in August by 16 percent compared to the corresponding month last year. This increase in labour wages is attributed to the current rapid depreciation of local currency against foreign currencies and increasing of cost living.

LIVESTOCK National Average Prices of Animals.



Sheep (6M) [HEAD]

55,200

UR : 7% 6M : 11%
1M : -1% 1Y : 1%
3M : 11%



Sheep (12M) [HEAD]

75,750

UR : 3% 6M : 8%
1M : -1% 1Y : -2%
3M : 10%



Chicken [HEAD]

2,300

UR : 6% 6M : 1%
1M : 1% 1Y : 4%
3M : 3%



Goat (6M) [HEAD]

55,950

UR : -1% 6M : -1%
1M : 8% 1Y : NA
3M : 8%



Goat (12M) [HEAD]

76,900

UR : 4% 6M : 6%
1M : -1% 1Y : -5%
3M : 8%

The national monthly average of all monitored categories of sheep and goats decreased in August equally by 1 percent compared to July. The slight decreased in the national average prices is associated to the less demand of sheep and goats since the two main festival and religious seasons are completed. However, the prices of sheep and goats (6 months old) increased by 11 percent and 15 percent in Aden and Hadramaut_Coast in August compared to July. The increased in prices in these governorates is due to high demand associated to seasonal activities including wedding in Abyan, Aden, Amanat Al Asemah, and Hadramaut Coastal corridor. The average retail price of the monitored livestock has declined in trend ranged between 13 percent and 15 percent in Lahej and Marib governorates respectively in August compared to last month. The livestock market experience instable prices and supply due access constrained imposed by conflict to livestock keepers and high transportation costs and restrictions.

ANIMAL PRODUCTS National Average Retail Prices of Animal Products.



Beef

5,487

UR : -5% 6M : 4%
1M : 0% 1Y : 7%
3M : 2%



Mutton

6,116

UR : -2% 6M : 4%
1M : 0% 1Y : 6%
3M : 4%



Local Cow's Milk

632

UR : -6% 6M : 3%
1M : -12% 1Y : 2%
3M : 3%



Yoghurt

402

UR : -2% 6M : 13%
1M : 3% 1Y : 18%
3M : 6%



Chicken Meat

1,991

UR : 1% 6M : 3%
1M : 1% 1Y : 6%
3M : 2%



Eggs

1,850

UR : -1% 6M : -6%
1M : 14% 1Y : 11%
3M : 12%

The national average prices of beef and mutton remained stable and all other monitored animal products have shown prices increase in August compared to July. The table eggs have witnessed significant price increase by 14 percent whereas yoghurt and chicken meat recorded insignificant price increase by 3 percent and 1 percent respectively compared to last month. The August monthly average retail prices of mutton, beef, chicken meat and packed eggs are recorded at 6,116 YER per a kilogram / , 5,487 YER per a kilogram 1,991 YER per a kilogram and 1,850 YER per a pack of 30 eggs respectively. The supply chains of these products have been unstable in August due to fuel and conflict crises. However, all monitored animal products except yogurt and mutton were not available in the market in Socotra governorates. In August, the fresh local cow milk was sporadically available in Al Jawf, Al Mahrah, Al Mahweit and Sa'adah governorates.

FISH National Average Retail Prices of Fish.

The seasonal winds levels in August remained the same as of the previous two months (June – July) limiting the physical access to traditional fishing grounds and transportation of fish to the markets which has reduced the supply of fish to internal and coastal governorates. In August, the targeted 21 governorates experience significant fish supply chain disruptions. The worst affected governorates with decline fish supply and catch includes Ad-Dale, Al Jawf, Al Mahrah, Amran and Socotra. The August national average retail fish prices increased in Jahsh, Thamad, and Sakhla types by 6 percent, 3 percent and 1 percent respectively compared to July. The Sakhla fish types remained expensive for the last three months with national average retail price of 5,041 YER per a kilogram in August. The Thamad, Jahsh and Bagha reached the retail prices at 3,329 YER per a kilogram, 3,090 YER per a kilogram and 1,210 YER per a kilogram in August. The national average increment in the fish retail prices is attributed to low catch due seasonal monsoon winds, restrictions of fishermen movement due to conflict escalations and high cost of fuel.



Thamad [1KG]

3,329

UR : -3% 6M : 14%
1M : 3% 1Y : -5%
3M : 38%



Sakhla [1KG]

5,031

UR : 6% 6M : 6%
1M : 1% 1Y : 4%
3M : 8%



Jahsh [1KG]

3,089

UR : 0% 6M : 4%
1M : 6% 1Y : -2%
3M : 13%



Bagha [1KG]

1,210

UR : -2% 6M : 8%
1M : 0% 1Y : 8%
3M : 12%

COMMODITIES' PRICES AT GOVERNORATE LEVEL

Commodity Governorate	Unofficial Exchange Rate	Locally Produced Cereals				Locally Produced Vegetables				Fuel			
		Sorghum	Millet	Maize	Barley	Onion	Tomato	Potato	Chilly	Okra	Petrol	Diesel	Cooking Gas
Abyan	756	652	533	608	538	579	808	438	1,450	996	384	392	3,979
Aden	774	675	663	583	663	575	633	433	975	1,450	318	352	5,050
Al Bayda	598	585	528	576	631	388	519	411	743	1,206	565	617	5,883
Al Dhale'e	767	650	500	500	713	556	1,000	500	1,000	1,025	336	394	6,500
Al Hudaydah	598	243	250	325	619	437	496	369	555	984	602	653	5,735
Al Jawf	622	533	442	382	436	469	605	579	558	690	452	481	7,208
Al Maharah	769	763	763	1,000	681	494	1,075	672	1,463	1,500	345	350	3,781
Al Mahwit	596	277	369	331	312	432	405	390	601	1,018	480	526	9,670
Amanat Al Asimah*	599	488	450	467	504	388	521	354	871	1,558	295	345	3,933
Amran	585	256	364	350	220	400	529	400	208	1,054	353	404	5,629
Dhamar	599	281	423	364	336	434	478	385	416	803	620	636	7,979
Hadramaut (Coast)	767	675	733	721	663	425	988	552	1,396	1,608	308	308	2,825
Hadramaut (Valley)	764	527	546	963	873	388	803	501	1,442	2,105	323	320	3,108
Hajjah	597	276	330	498	500	435	525	433	638	913	533	615	5,073
Ibb	598	431	477	458	400	388	429	323	523	913	567	623	6,217
Lahj	771	744	638	762	725	550	717	442	1,170	1,156	332	363	3,750
Marib	769	525	525	525	700	506	767	506	773	1,106	175	386	2,500
Raymah	595	324	379	298	310	444	534	374	573	794	662	675	4,450
Sa'adah	597	444	378	406	374	410	470	414	541	641	399	440	9,885
Shabwah	767	800	768	615	738	550	813	500	1,250	1,238	380	401	3,194
Socotra	733	NA	NA	NA	NA	1,000	1,500	1,500	3,500	NA	300	1,105	9,200
Taizz	692	483	503	472	483	472	709	420	1,114	1,067	422	482	6,405

*Sana'a City and its environs.

- The current fuel crises and its' associated high costs to transport and production remained a major challenge that disrupted the supply chain of fish, locally produced fresh animal products, fruit, vegetables and local grain from the area of productions to the local markets. The significant disruption was reported for most of animal products in Socotra and local cow milk in Al Jawf, Al Mahrah, Al Mahweit and Sa'adah in August compared to July. The fuel crises that coupled with the seasonal winds attributed for sporadic availability of most monitored fish types in 11 governorates including Ad-Dale, Al Jouf, Al Mahrah, Amran, Dhamar, Hajjah, Ibb, Lahej, Marib, Socotra and Taiz. The local produced and imported food in Socotra remain at the same level in August compared to July. The ongoing seasonal strong wind typically experienced from June to September annually remain the barrier to supply of local produced and imported food via seaport. The essential agricultural, livestock and poultries inputs were totally unavailable in Raymah, Socotra and Lahej and sporadically available in Ad-Dale, Al Mahrah and most others of governorates in August compared to July.
- Under normal market systems, the prices of imported commodities in August showed price differences between 3 percent and 5 percent in the rural markets compared to the main capital cities of the governorates. However, the trends remain varied across all districts and governorates. It varies due to proximity of the markets to the main ports and supply routes including informal market networks, integration and synergy with other markets networks and including the humanitarian assistance programs, which could influence the price variability between rural and urban market centers.

COMMODITIES' PRICES AT GOVERNORATE LEVEL

Imported Commodities

Livestock

Commodity Governorate	Wheat Flour	Wheat Grains	Sugar	Basmati Rice	Non-Basmati Rice	Cooking Oil	Beans	Local Cooking Oil	Sheep 6M	Sheep 12M	Goat 6M	Goat 12M	Live Chicken
Abyan	386	345	541	967	425	1,050	882	921	62,500	76,250	65,400	77,500	2,400
Aden	390	383	479	1,042	450	1,167	1,100	1,008	73,750	85,000	76,900	89,250	2,750
Al Bayda	295	281	458	1,033	513	1,263	881	1,074	60,750	88,150	51,200	79,800	1,750
Al Dhale'e	375	300	450	1,000	619	1,015	892	883	44,000	67,400	46,650	71,050	2,000
Al Hudaydah	274	241	349	819	590	791	813	790	48,450	74,350	51,100	79,100	2,200
Al Jawf	295	298	483	999	479	840	319	825	71,850	96,950	56,700	73,450	2,450
Al Maharah	378	406	534	1,138	613	807	1,153	NA	69,650	88,900	77,700	97,500	2,950
Al Mahwit	299	230	376	908	383	815	714	765	30,250	51,450	33,950	55,800	2,100
Amanat Al Asimah*	250	248	335	650	400	710	538	712	56,650	76,650	58,000	77,000	1,700
Amran	294	248	407	933	408	1,554	550	729	40,000	64,350	40,600	65,850	1,800
Dhamar	300	283	400	978	400	984	690	896	42,050	55,150	41,100	56,500	1,900
Hadramaut (Coast)	342	325	489	887	479	1,119	883	817	86,000	95,600	90,500	100,850	2,550
Hadramaut (Valley)	336	325	443	993	698	1,324	980	955	64,950	74,700	69,050	81,300	2,050
Hajjah	317	269	431	925	483	1,069	763	863	26,650	50,250	26,150	54,000	2,950
Ibb	325	307	408	1,017	420	1,083	917	925	40,250	75,250	42,650	78,800	2,000
Lahj	413	391	501	1,002	688	1,244	1,041	1,002	56,950	73,350	59,500	75,150	2,600
Marib	306	271	465	835	465	894	903	615	77,800	99,700	70,500	88,450	2,550
Raymah	300	249	371	808	393	870	571	771	50,900	74,200	53,500	75,250	2,150
Sa'adah	271	243	368	841	393	814	534	757	61,000	87,650	61,400	83,950	2,050
Shabwah	398	350	575	969	508	1,013	1,034	869	87,500	116,250	85,000	112,500	2,950
Socotra	400	270	500	1,200	1,000	1,188	1,500	1,000	28,000	39,000	35,000	50,000	NA
Taizz	378	341	500	1,129	477	1,147	1,161	902	34,400	56,350	38,300	69,050	2,550

*Sana'a City and its environs.

- Agriculture inputs;** In August the inputs in crop, livestock and poultry sectors experience scarcity and soaring prices of the inputs compared to July. The August retail prices inputs of vegetable seeds, chemical fertilizers, livestock medicine and fisheries remained stable in Aden, Amanat Al Asemah Sana'a, Marib and Hadramout Coastal corridor compared to July. In Abyan and Taiz governorates, the cost of irrigation recorded the highest increase by 63 percent and 20 percent respectively. In Shabwah the, prices of okra seeds increase by 24 percent while the seeds of tomato increased by 19 percent in August compared to July. In other governorates, the onion seeds increased in Hodeidah by 27 percent, sweet pepper by 17 percent in Sa'adah, Urea increased by 22 percent, 16 percent and 10 percent in Amanat Al Asemah, Marib and Hajjah governorates respectively. The increment of inputs in August compared to July is attributed to high transport cost and physical inaccessibility to farming fields to deliver the inputs. In Amanat Al Asemah, Marib, Sa'adah, Aden, Al Baidha and Dhamar witnessed inputs availability in August compared to July.

Food Security and Early Warning Information System (FSIS II) Programme

is funded by the European Union and implemented by Food and Agriculture Organization of the United Nations (FAO) and government partners.

 Food and Agriculture Organization of the United Nations



MONTHLY MARKET MONITORING BULLETIN

is one of the regular products of Food and Agriculture Organization of the United Nations (FAO) in partnership with the Food Security Technical Secretariat.

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