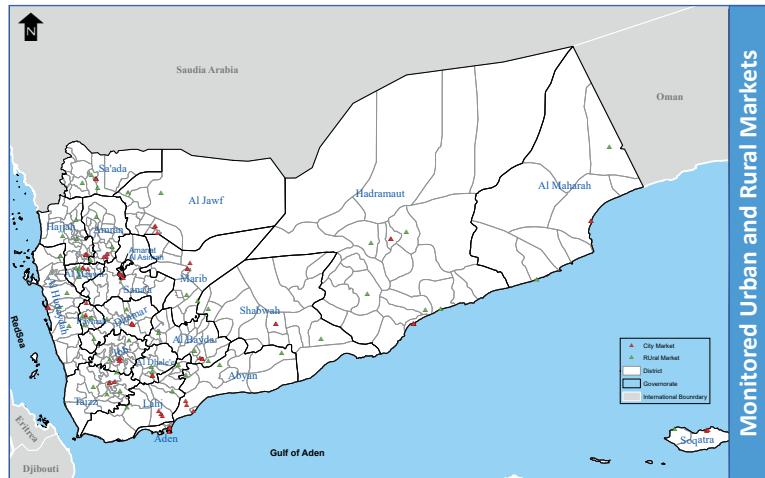


MONTHLY MARKET MONITORING BULLETIN

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 at the moment 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) are covered (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). The price data are collected from at least three representative market centers in the main cities and 3-4 markets in the rural areas (see alongside map). 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 or four markets are selected to represent rural markets within a governorate. The rural markets also capture the supply chain of imported commodities reaching the rural areas and the price differences. This Bulletin provides easy to use tables and charts that show monthly price 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

Globally:

The FAO Food Price Index (FFPI) averaged 180.5 points in February 2020, down 1.9 points (1.0 percent) from January but still 13.5 points (8.1 percent) higher than in February 2019. The FAO Cereal Price Index averaged 167.8 points in February, down 1.5 points (0.9 percent) from January. International prices of wheat mostly increased in January with the benchmark US wheat (No.2 Hard Red Winter, f.o.b.) rising for the fourth consecutive month and averaging USD 237 per ton, more than 5 percent higher than in December.(FPMA – FAO 12/02/2020).

Fuel Commodities:

Apart from the cooking gas, prices of Diesel and Petrol in February remained stable as of the previous month. At the moment the official prices of a liter of Petrol and Diesel in Marib and Al Jawf are still much lower by 109 % and 169% (3,500 YER /20Lt) and (3,200 YER/20Lt) respectively compared to the rest of the governorates (7,300 YER / 20 Lt) and (8,600 YER / 20 Lt).

Imported Food Commodities:

Compared to the previous month prices of basic food commodities were higher in February. For the second month in a row, Sugar continued to have the highest increase by 7.3%, followed by 4.5% for the Non-Basmati Rice, nearly 4% for Wheat Flour 2.8% for Wheat Grains and by less than 2% for the Basmati Rice. However, and despite the remarkable supply of the monitored imported food commodities, the price spike was influenced partly by liquidity crisis and uncontrolled fluctuation of exchange rate observed between the governorates of south and north.

Locally Produced Products:

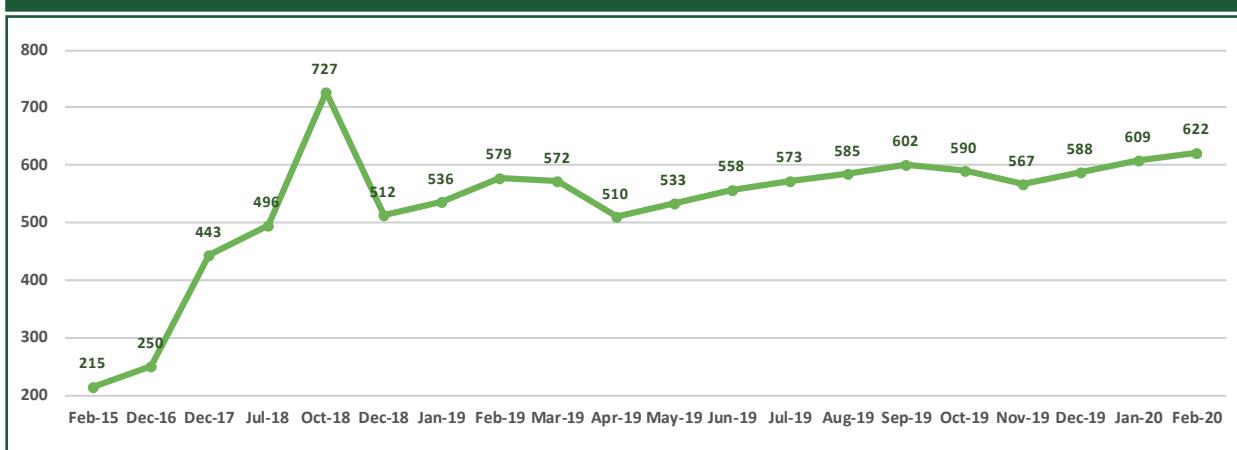
Similar to imported food commodities, prices of locally produced staples went up slightly by 1.1% for Maize and by less than 1% for Millet, Sorghum and Barley in that order. The current prices showed a sharp increase compared to one year ago by 17.5% for Wheat, above 10% for Barley and Millet, 8.6% for Maize and by 6% for Sorghum.



Central fruit and vegetable market, Craiter, Aden, Yemen ©FAO

EXCHANGE RATE

National Monthly Average of The Unofficial Exchange Rate Trend (YER/USD)



OFFICIAL

YER
↓
USD
440



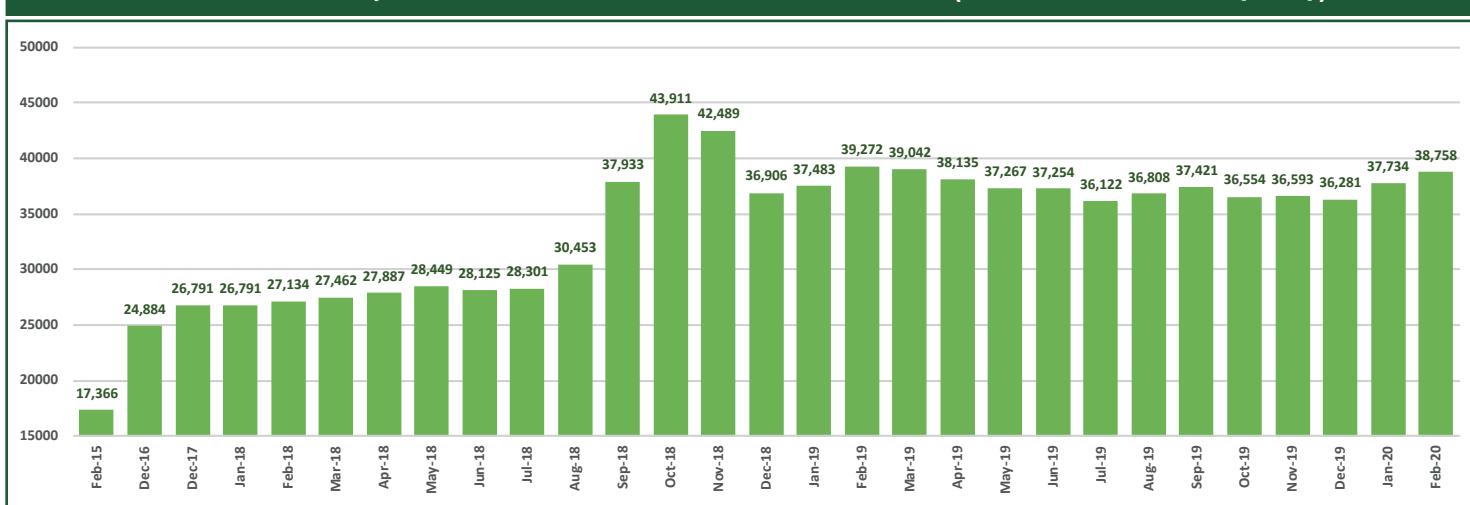
UNOFFICIAL

YER
↓
USD
622

The local currency exchange rates against the USD dollar continued to depreciate. It recorded 622 YER / USD, recording further drop in YER value against USD by 2.2% increase compared to the previous month. Furthermore, data showed an increased trend by 41% compared to the current official rate (440 YER/USD), 7.6% higher than its value in the corresponding month last year (February 2019) and significantly by 189% when compared to the pre-crisis time. At governorate level, the current value of unofficial exchange rate exceeded 640 YER/USD across the monitored markets in Aden, Al Dhalee, Al Maharah, Hadramaut (Valley), Marib, Shabwah, and Socotra Governorates. On the other hand, Raymah recorded the lowest by 584 YER/USD.

MINIMUM / SURVIVAL FOOD BASKET

Cost of Minimum / Survival Food Basket for 7 Persons Per Month (Trends Since Pre-Crisis [Feb-15])



Cost of Minimum / Survival Food Basket* for 7 Persons:

The national average cost of Minimum/survival Food Basket (MFB) in February went up to 38,758 YER (Equiv. to 62 USD) with an increase of 3% compared to previous month. It significantly increased by 123% compared to pre-crisis cost (Feb 2015) and decreased by 1% compared to the corresponding month last year (Feb 2019). The MFB cost exceeded 40,000 YER in nine governorates, where Socotra had the highest at (46,298 YER- Equiv. to 74 USD) followed by Taiz at 44,639 YER , while Al Jawf recorded the lowest cost of 31,074 YER (Equiv. to 50 USD).In fact , this price escalation resulted from the ongoing impact of changing exchange rates of YER against the USD as well.

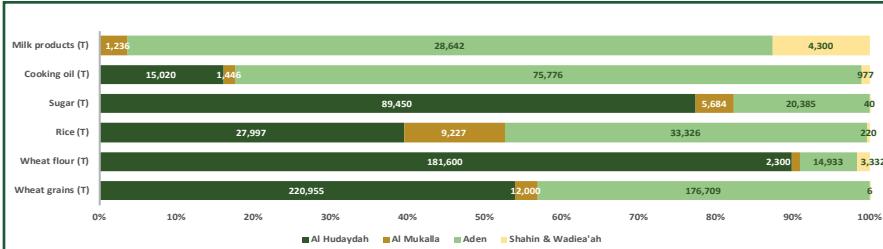
*Composition of Yemen Minimum/Survival Food Basket for 7 persons per month (Prepared and adopted by FSAC partners) : 75Kgs Wheat Flour,10Kgs Dry Weight Beans (Red Kidney of Beans), 8 Liters Vegetable Cooking Oil (Mostly Imported), 2.5 Kgs Sugar and 1Kg Iodized Salt.



38,758 YER

FOOD IMPORTS COMMODITIES (SEA/LAND) PORTS

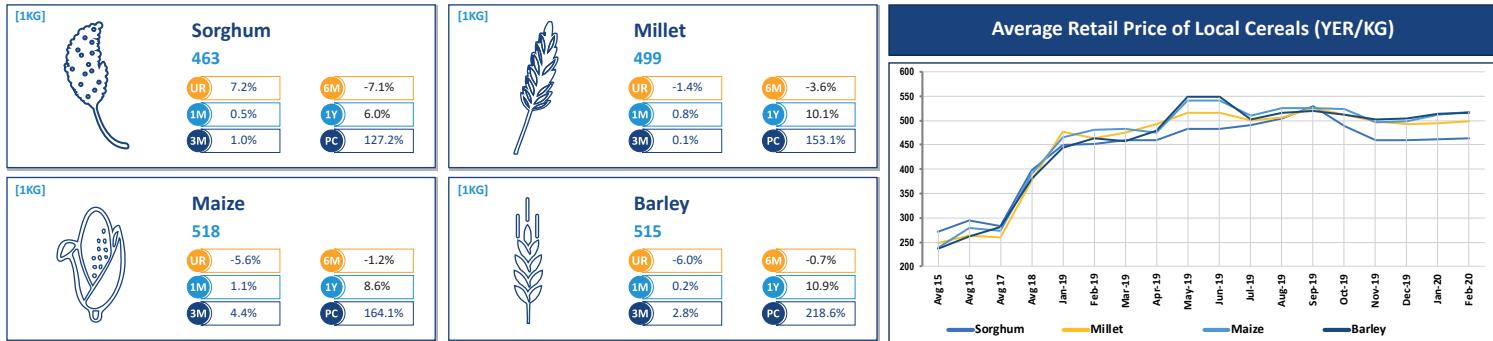
During the period of (January – February), an estimated (925,561 MT) of various food items (wheat grains, wheat flour, sugar, rice, milk and cooking oil) were Imported through the various maritime seaports of Aden, Al Hudaydah, Al Salif and Al Mukalla as well as the Land ports of Shahin & Wadiea'ah. Wheat grains, Wheat flour, and Sugar constitute the major food imports by 44.3%, 21.8% and 12.5% respectively. Share of Al Hudaydah and Assailef seaports constitute 57.8% of the total imports ,where during this period (January – February 2020) it received 535,022 MT of basic food commodities , of which , 24% (mainly Wheat Grains, Sugar, Rice , Cooking Oil and Kidney Beans) were imported for humanitarian assistance.



LOCAL CEREALS

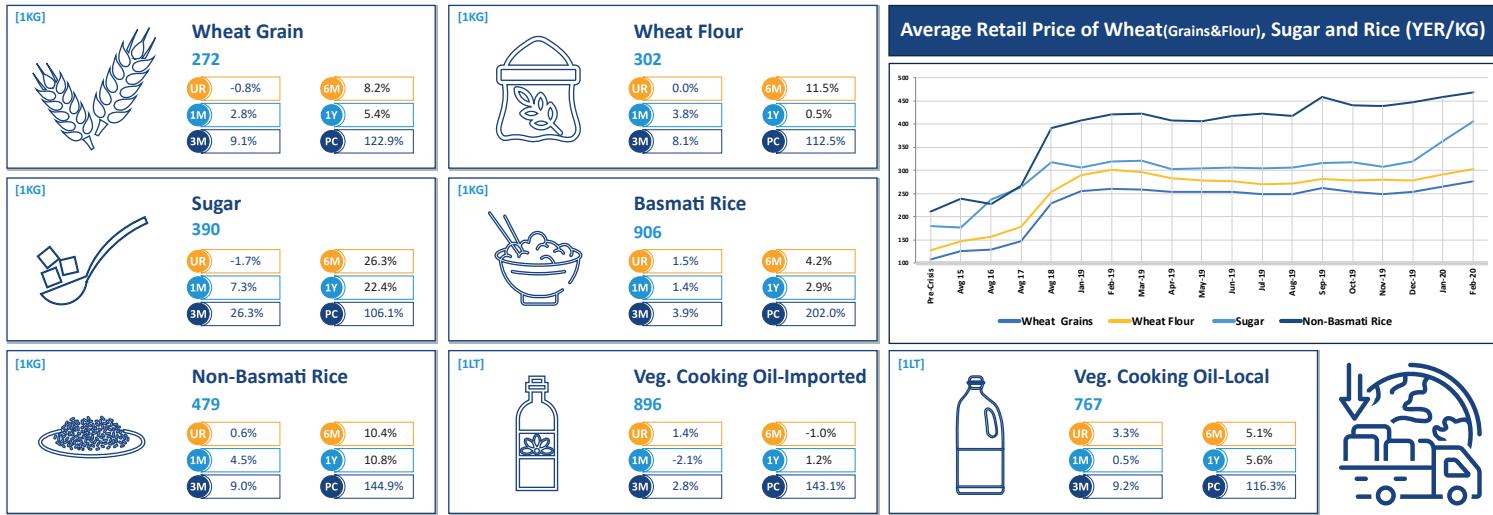
KEYS
UR Urban Vs. Rural
6M Current Month Vs. Previous Month
1M Current Month Vs. 6 Months Earlier
1Y Current Month Vs. Year Earlier
3M Current Month Vs. 3 Months Earlier
PC Current Month Vs. Pre-Crisis

National Average Retail Prices of Local Cereals During Feb-20.



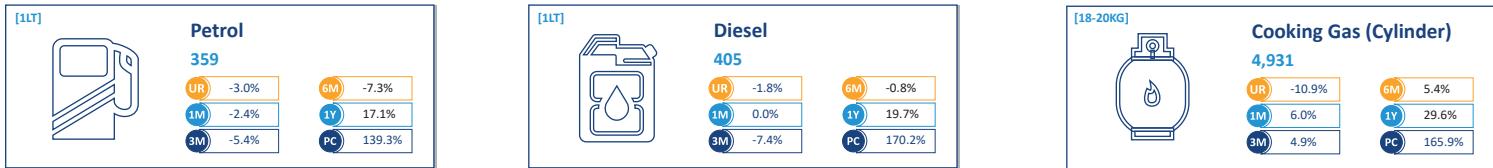
IMPORTED COMMODITIES

National Average Retail Prices of Imported Commodities During Feb-20.



FUEL

National Average Retail Prices of Fuel During Feb-20.

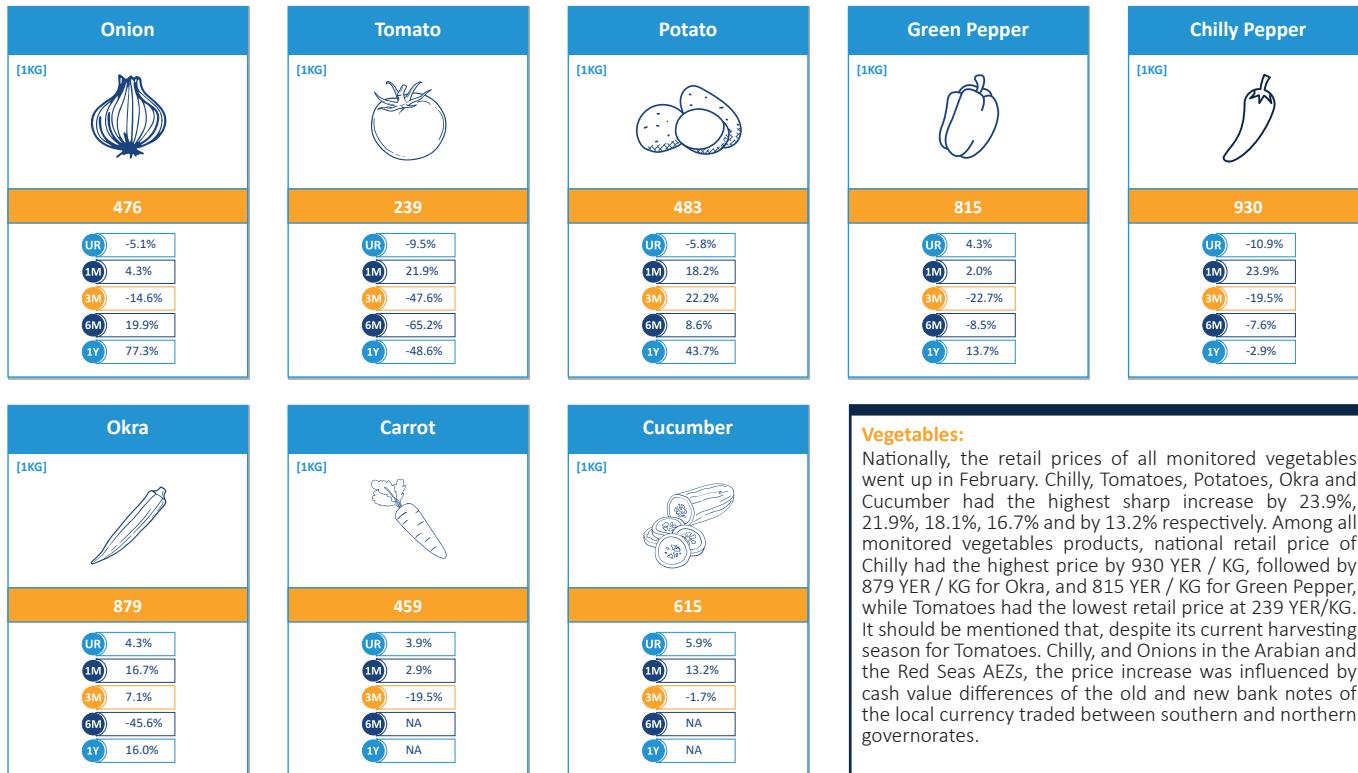


VEGETABLES

KEYS:
UR Urban Vs. Rural
6M Current Month Vs. 6 Months Earlier
1M Current Month Vs. Previous Month
3M Current Month Vs. 3 Months Earlier
1Y Current Month Vs. Year Earlier

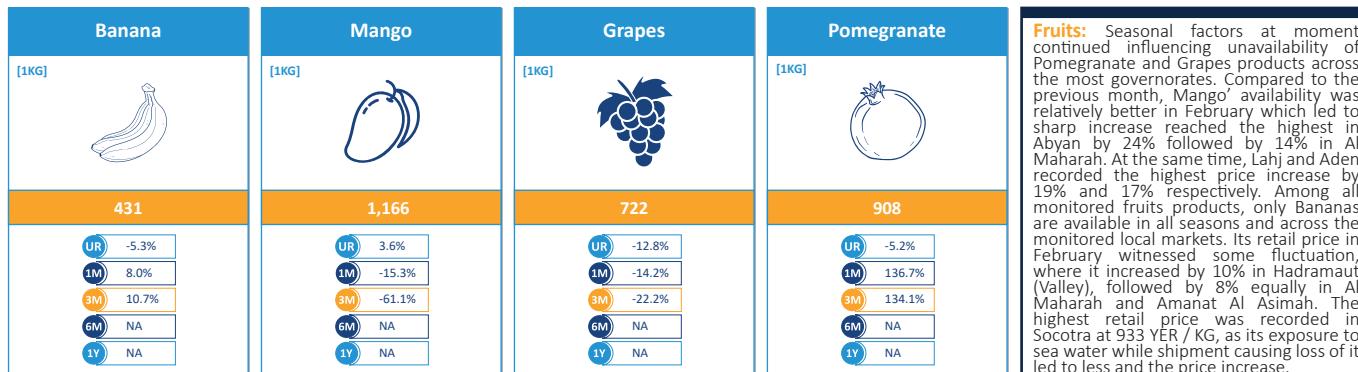
3M Current Month Vs. 3 Months Earlier

National Average Retail Prices of Vegetables During Feb-20.



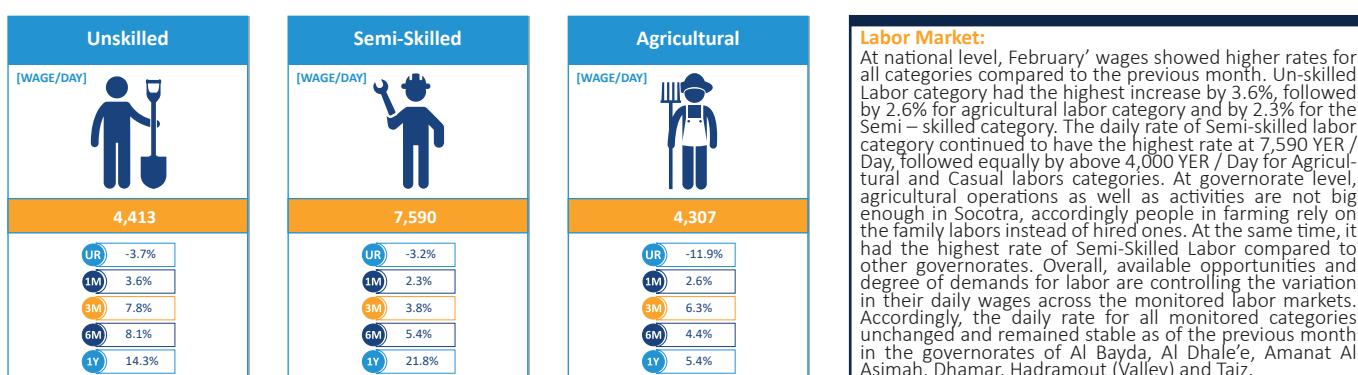
FRUITS

National Average Retail Prices of Fruits During Feb-20.

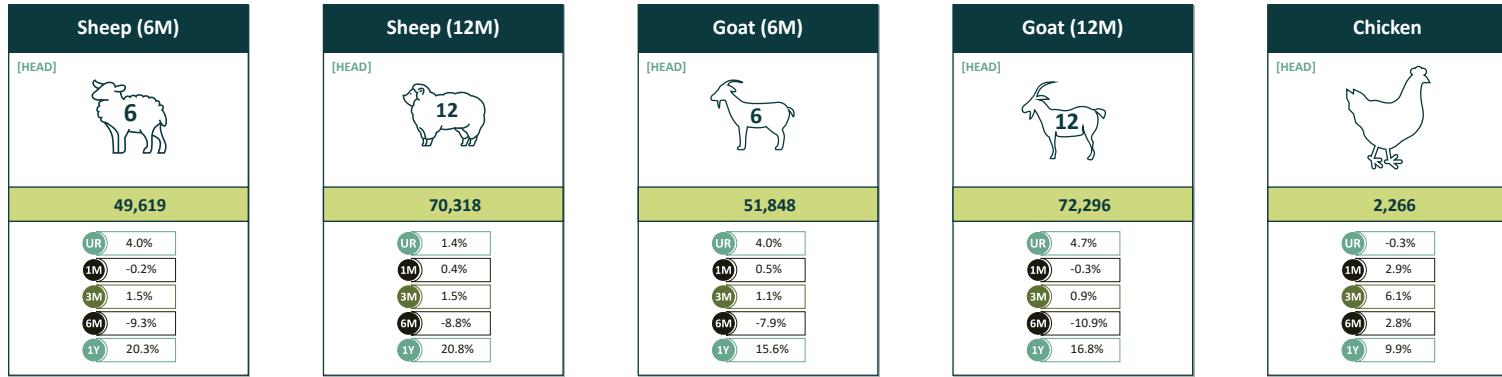


LABOR MARKET

National Average Labor Market Prices During Feb-20.

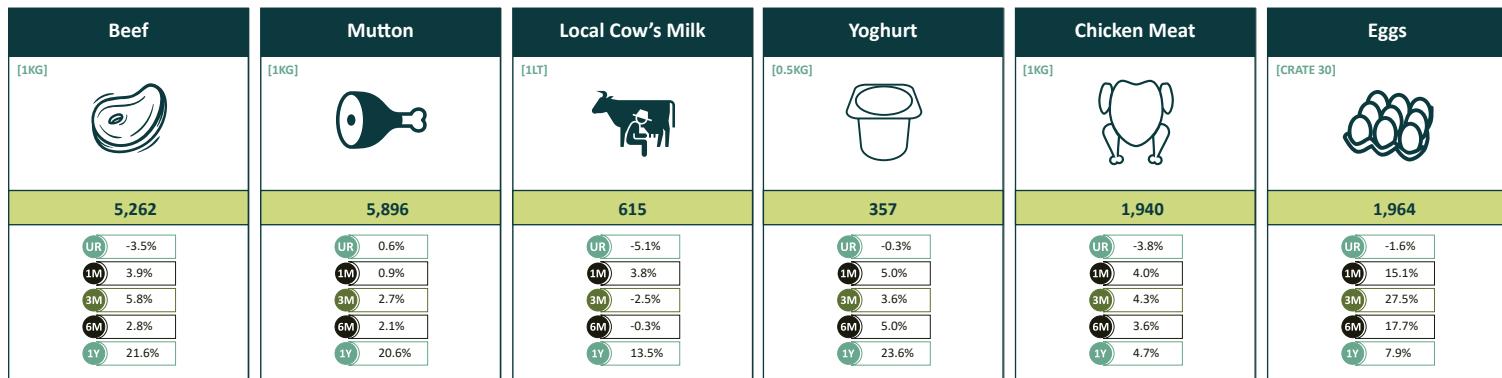


National Average Prices of Animals During **Feb-20**.



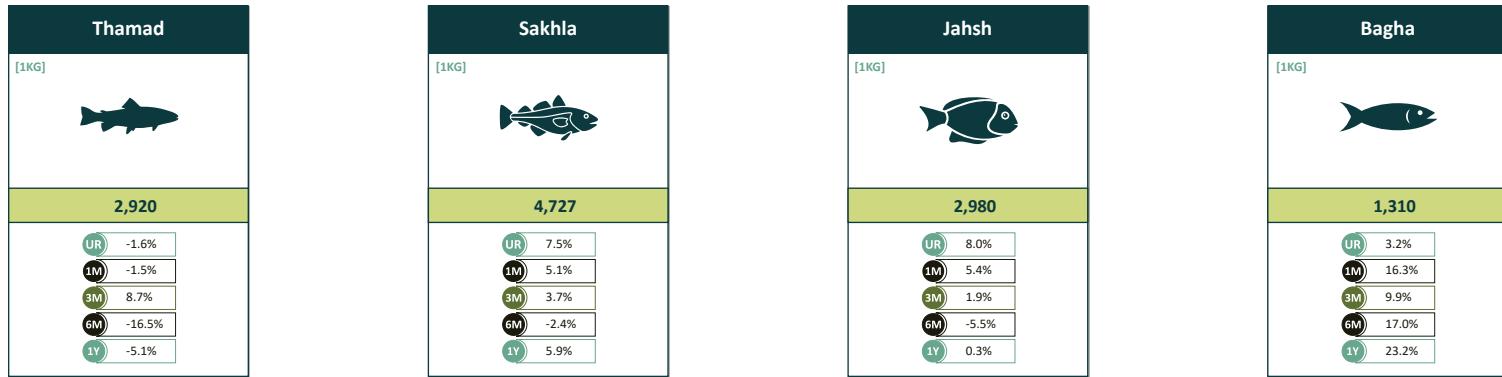
ANIMAL PRODUCTS

National Average Retail Prices of Animal Products During **Feb-20**.



FISH

National Average Retail Prices of Fish During **Feb-20**.



Livestock:

Nationally, the monthly average retail price of the single head of Goats (12 months old) in February continued to be the highest by 72,296 YER for the single head of Sheep of the same age (12 months). In general, and compared to the previous month, livestock market witnessed higher supply that associated with a slight price changes, included less than 1% drop for the Sheep (6 Months) and Goat (12 Months) and price increase at the same percentage for Sheep (12 Months) and Goat (6 Months). This is in fact, influenced by supply and demands principles, particularly, during the current season that was evident in the weekly markets of Abyan, Al Mahwit, Hajjah and Sa'adah where the more supply resulted in prices of all categories to go down. National average retail price of live Chicken and table eggs continued their increasing trends by nearly 3% and 12.2% respectively.

Animal Products:

At national level, all monitored animal products followed the same price trends of other locally produced products and went up in February. Eggs recorded the highest sharp increase by 15.1%, followed by nearly 5% for Yoghurt, 4% for Chicken meat and by 3.8% for the local Cow's milk. Among them, Mutton recorded the highest retail price at 5896 YER / KG, followed by 1,964 YER / Pack of 30 eggs, and 1,940 YER / KG of Chicken meat.

Fish:

Compared to the previous month, and apart from Thamad (price declined by less than 2%) February' prices witnessed an increased trends over all other monitored fish types and Bagha continued for the second month in a row to have the highest by 16.3% followed equally by above 5% for Sakhla and Jahsh types. All monitored types were unavailable in Al Jawf markets. Similarly, for Sakhla and Bagha types were unavailable in Ad-Dale, Hadramout _ Valley, Amran, Al Mahwit, Marib and Socotra. Apart from Al Mahwit and Hajjah, Thamad was available across the rest monitored markets. In February, national monthly average of retail prices of Sakhla fish type continued to have the highest at 4,727 YER / KG followed by 2,980 YER / KG for Jahsh and by 2,920 YER / KG for Thamad types and the least for Bagha at 1,310 YER/KG. These prices were influenced by the availability and supply of the relevant species that commonly costumed.

COMMODITIES' PRICES AT GOVERNORATE LEVEL

Monthly Average Prices for the Basic Food and Non-Food Commodities During Feb-20.

Governorate	Exchange Rate	Local Grains & Legumes					Vegetables							Fruits					Animal Products						
		Sorghum Grain	Millet Grain	Maize Grain	Barley Grain	Wheat Grain	Onion	Tomato	Potato	Green Pepper	Chilly	Cucumber	Carrots	Okra	Mango	Grape	Banana	Pomegranate	Beef	Mutton	Local Cow Milk	Yoghurt	Chicken Meat	Egg	
		YER/1 USD	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	30 Eggs
Abyan	646	558	554	558	538	NA	421	210	456	1,013	796	823	602	875	1,142	NA	331	NA	6,375	6,229	625	306	1,463	2,013	
Aden	655	688	642	600	663	706	433	186	402	1,175	750	717	500	1,133	1,533	NA	379	NA	7,125	6,292	587	375	1,400	2,050	
Al Bayda	595	566	547	565	604	832	482	216	422	836	904	600	358	928	1,117	NA	465	NA	5,000	5,792	800	363	1,922	1,804	
Al Dhalea	654	600	500	600	656	NA	550	238	569	1,233	838	431	563	1,038	1,000	NA	400	NA	4,000	5,000	600	300	2,500	2,000	
Al Hudaydah	594	237	332	369	625	426	383	128	430	494	545	531	380	499	967	NA	403	NA	5,292	6,125	542	281	2,071	1,749	
Al Jawf	618	510	538	406	478	389	542	246	527	627	700	600	431	697	800	1,000	NA	463	NA	6,500	6,948	950	389	2,767	2,026
Al Maharah	651	619	594	738	619	570	469	331	544	1,144	1,044	744	613	1,166	1,556	NA	500	NA	6,563	6,813	NA	477	1,772	2,056	
Al Mahwit	593	252	451	351	300	417	433	160	473	629	658	529	346	663	NA	NA	355	NA	3,500	5,000	NA	304	1,958	1,775	
Amanat Al Asimah	592	453	438	488	467	454	267	396	696	904	563	308	988	1,033	444	325	750	4,125	5,958	588	260	1,783	1,646		
Amran	593	280	376	NA	250	385	485	319	417	588	654	500	300	744	NA	400	NA	4,250	5,000	217	280	2,033	2,854		
Dhamar	594	280	550	385	342	392	433	182	504	535	538	460	245	604	1,083	NA	379	NA	5,167	5,500	805	313	1,575	1,783	
Hadramaut (Coast)	654	533	692	525	563	555	401	172	471	1,054	1,102	663	590	1,408	1,535	NA	444	NA	5,083	6,042	635	329	4,140	1,944	
Hadramaut (Valley)	650	518	548	863	763	550	399	152	472	1,146	1,207	647	450	1,549	1,092	NA	465	NA	4,600	5,663	NA	322	1,626	1,899	
Hajjah	593	222	288	451	455	260	492	144	448	629	733	588	458	633	NA	NA	410	NA	5,000	6,042	764	327	1,629	1,785	
Ibb	595	411	460	448	422	348	407	193	460	639	688	556	279	669	1,940	NA	350	NA	4,938	5,833	700	342	2,154	1,721	
Lahj	657	588	567	750	500	NA	460	240	488	1,004	875	588	504	960	1,665	NA	385	1,067	6,750	6,500	450	377	1,658	2,023	
Marib	655	472	458	488	625	563	438	200	417	658	879	556	388	752	1,467	NA	438	NA	5,313	6,313	531	333	2,225	1,813	
Raymah	584	354	363	317	298	328	414	111	432	500	579	450	431	522	1,200	NA	404	NA	5,375	6,000	547	292	1,854	1,835	
Saada	593	452	412	385	415	398	554	280	520	568	579	525	406	653	944	NA	381	NA	5,139	6,000	NA	355	2,660	1,654	
Shabwah	653	693	696	588	763	850	481	164	444	988	1,100	656	581	1,190	1,103	NA	416	NA	5,750	6,859	575	413	1,456	2,031	
Socotra	652	NA	NA	NA	NA	NA	NA	933	900	933	NA	3,250	1,250	1,000	NA	NA	933	NA	NA	3,375	NA	750	2,200	2,750	
Taiz	621	448	479	488	463	NA	410	215	409	960	849	559	375	825	700	NA	452	NA	4,667	6,427	542	370	2,560	1,988	

Governorate	Minimum / Survival Food Basket	Fish				Imported Commodities							Fuel Items			Labor Market			Live Animals					
		Thamad	Sakhla	Bagha	Jahsh	Wheat Grains	Wheat Flour	Beans	Sugar	Rice Basmati	Rice Non-Basmati	Cooking Oil Imported	Cooking Oil Local	Diesel	Petrol	Gas Cylinder	Casual / Unskilled Labor	Agriculture Labor	Semiskilled Labor	Sheep (6 Months)	Sheep (12 Months)	Goat (6 Months)	Goat (12 Months)	Live Chicken
		1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1Kg	1lt	1lt	1lt	18-20 Kg	Day	Day	Day	Head	Head	Head	Head	Head	Head
Abyan	41,838	3,031	3,953	1,492	3,281	277	328	840	380	961	431	967	853	387	375	4,083	3,915	3,427	5,822	71,479	60,042	76,042	2,553	
Aden	41,428	2,792	5,792	2,500	3,583	300	900	392	400	958	600	1,108	858	375	372	4,758	5,000	7,000	67,375	100,000	72,375	104,250	2,450	
Al Bayda	39,319	2,316	4,858	963	2,519	258	290	842	400	972	399	1,004	872	431	365	5,028	3,750	3,417	8,292	43,611	75,111	41,625	71,764	1,679
Al Dhalea	39,925	2,631	NA	6,000	250	300	650	450	950	513	1,200	1,000	413	384	3,000	6,000	5,000	8,000	41,438	53,688	6,000	60,438	2,600	
Al Hudaydah	35,668	2,906	3,481	1,153	2,417	227	281	828	345	841	609	690	653	433	365	5,480	3,792	3,313	6,000	49,468	74,717	54,056	77,238	2,078
Al Jawf	31,074	NA	NA	NA	NA	267	262	521	400	885	385	632	587	389	330	6,379	4,125	5,042	6,694	65,250	96,854	62,854	78,500	2,685
Al Maharah	40,058	3,891	2,000	800	2,050	325	313	975	428	1,000	588	699	NA	375	375	3,813	6,613	5,653	12,438	56,714	77,577	40,020	87,178	2,813
Al Maharah	39,218	3,217	3,625	1,650	2,092	273	262	425	293	888	429	878	728	664	367	8,368	3,917	3,333	7,500	31,146	54,417	35,063	57,729	1,654
Al Mahwit	38,218	5,000	3,000	1,000	2,500	246	280	763	350	844	362	1,069	636	430	365	3,800	3,000	3,000	6,000	35,500	75,367	55,000	75,000	1,538
Amanat Al Asimah	31,800	3,217	3,625	1,650	2,092	273	262	425	293	888	429	878	728	664	367	8,368	3,917	3,333	7,500	31,146	54,417	35,063	57,729	1,654
Amran	36,218	5,000	3,000	1,000	2,500	246	280	763	350	844	362	1,069	636	430	365	3,800	3,000	3,000	6,000	35,500	75,367	55,000	75,000	1,538
Dhamar	30,457	3,194	4,017	1,228	3,175	263	295	828	351	871	357	928	821	434	380	4,683	3,285	3,325	5,521	41,813	61,771	43,750	63,583	2,701
Hadramaut (Coast)	39,429	2,000	5,281	1,317	2,069	280	293	783	392	779	408	1,061	792	335	330	2,796	4,250	5,500	6,383	65,871	76,954	65,438	77,696	2,433
Hadramaut (Valley)	41,446	1,799	8,000	NA	NA	288	296	971	353	865	595	1,056	816	348	346	3,159	3,250	4,550	4,875	66,394	61,902	74,142	1,975	
Hajjah	37,293	NA	5,000	875	4,000	300	667	360	879	456	881	437	375	4,477	3,000	3,396	7,875	36,000	53,667	39,083	57,417	2,608		
Ibb	40,488	3,708	5,531	1,500	3,458	296	308	838	375	945	408	992	869	428	366	5,729	4,167	4,813	6,979	35,979	61,808	36,671	67,440	1,902
Lahj	39,511	3,108	6,500	883	3,125	300	308	708	39															