

MONTHLY MARKET MONITORING BULLETIN

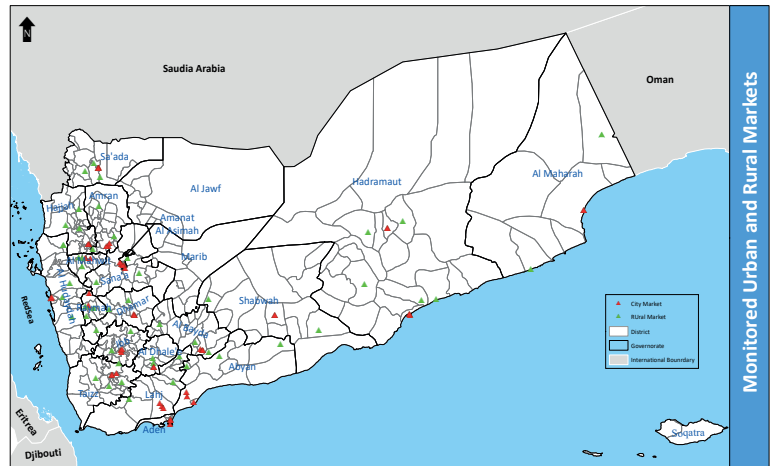
BACKGROUND



December, 2019
#53

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 eighteen (18) 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, Dhamar, Hadramaut Coast (Al Mukalla), Hajjah, Al Hudaydah, Ibb, Lahj, Amanat Al Asimah (Sana'a City), Shabwah, Taizz, Al Mahrah, Amran, Raymah, Al Mahwit, Sa'adah* in addition to *Hadramout Valley (Sayun)*. Thereafter the average prices are calculated for each commodity per governorate on monthly basis.



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 prices reaching the rural areas and price 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

Globally:

The FAO Food Price Index* (FFPI) averaged 181.7 points in December 2019, up 4.4 points (2.5 percent) from November, marking the third month of consecutive increase. The FAO Cereal Price Index averaged almost 164.3 points in December, representing a rebound of 2.2 points (1.4 percent) from November. International prices of wheat declined in November, with the benchmark US wheat (No.2 Hard Red Winter, f.o.b.) averaging USD 232 per ton, down by more than 3 percent from its level in October but still up 5 percent from the corresponding month last year. (FPMA – FAO 10/12/2019).

Fuel Commodities:

At national level and compared to the previous month, the national average of the retail price of single liter of all monitored fuel items continued its price decline in December. Diesel had the highest price drop by nearly 6%, followed by 3.1% for Petrol and by 2.2% for Cooking Gas. This change in the prices was influenced by the supply stability that resulted in relative availability of the products in the local monitored markets. Nevertheless, the current retail price sharply increased when compared to the prices of cooking gas one year ago by nearly 14%. Further, Diesel and Petrol retail price significantly increased by above 170% and 140% respectively when compared to the pre-crisis (Feb 2015) prices.

Imported Food Commodities:

At national level, and apart from Wheat flour (price marginally dropped) average retail prices of all other monitored imported commodities went up slightly in December compared to November. The price of 1 kg of Sugar had the highest increase by nearly 4% followed equally by less than 2% for the Non-Basmati Rice, Wheat grains, and Basmati Rice in that order. However, it is worthy to mention that, due to its high comparative preference and demands among local people, the national average of retail price for the locally produced wheat grains (464 YER/KG) was much higher by 84% when compared to the imported ones (253 YER/KG). Similarly, the current retail price of imported Wheat grains under Yemeni conditions (253 YER/KG) is much higher by the same percentage, when compared to the global price of same commodity (136 YER/KG).

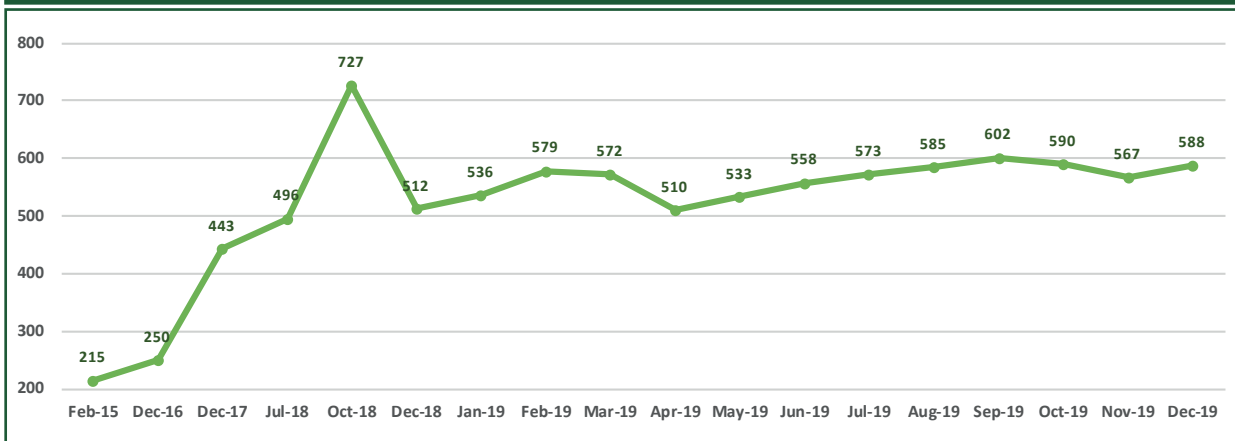
Locally Produced Products:

Due to increased supply of Tomatoes coming from the lowlands and coastal areas retail prices dropped sharply in all markets. Cereals prices compared to the previous month, December' national monthly average of Millet and Sorghum further decline while it raised slightly by less than 1% equally for Maize and Barley.



EXCHANGE RATE

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



OFFICIAL

YER
↓
USD
440



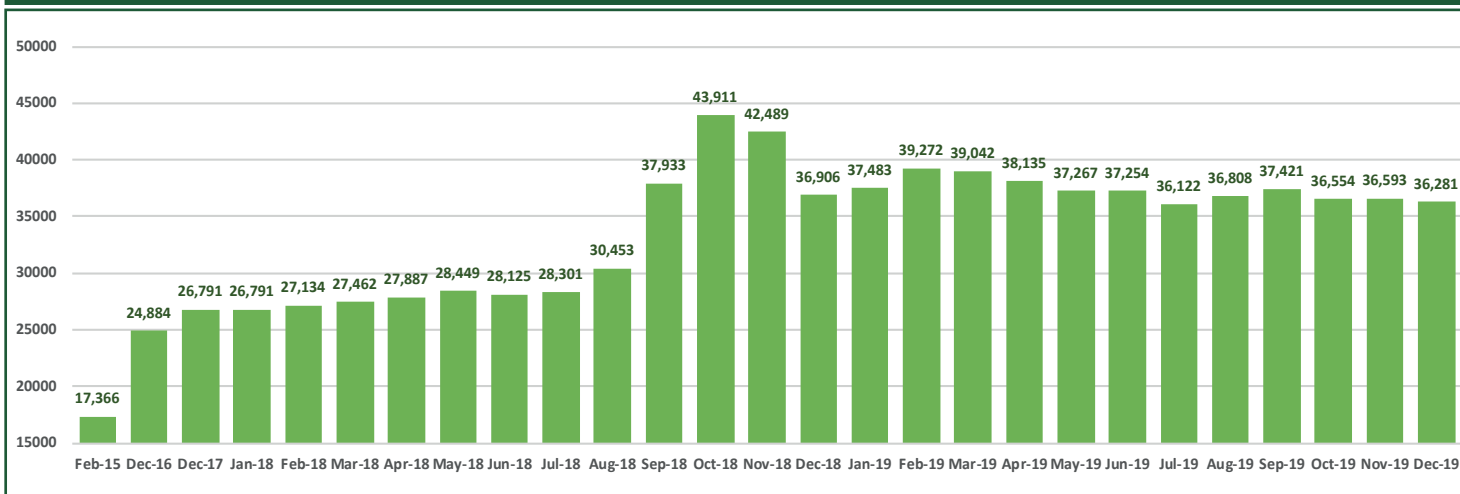
UNOFFICIAL

YER
↓
USD
588

In December, the national monthly average of unofficial exchange rate (buying) was 588 YER / USD, recording 4% drop in the value of YER compared to the previous month. Furthermore, data showed an increased of 34% compared to the current official rate (440 YER/USD), 15% higher than its value in the corresponding month last year (December 2018) and significantly by 173.5% when compared to the pre-crisis time. At governorate level, the current value of unofficial exchange rate exceeded 600 YER per USD across the monitored markets in the eight targeted southern governorates, and Shabwah had the highest by 610 YER / USD. On the other hand, Amran continued for the second month in a row to be the lowest by 574 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 December 2019 continued decline trends for the second month in a row compared to previous month and the corresponding month last year (December 2018) by 1% and 2%. Where it went down to 36,281 YER (Equiv. to 61.70 USD) in December compared to 36,593 YER in the previous month and (36,906 YER) in Dec 2018. The cost showed an increasing trend significantly by 109% compared to pre-crisis cost (Feb 2015) and remained to be the highest over the targeted governorates since September 2018. Sa'adah had the lowest cost of nearly 30,000 YER (Equiv. to 51 USD).

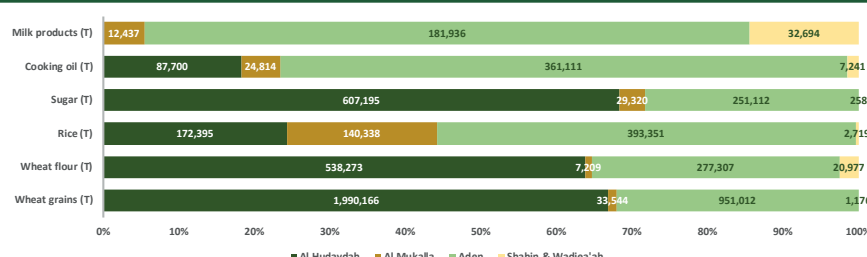
*Composition of Yemen Minimum/Survival Food Basket for 7 persons per month (Prepared and adopted by FSAC partners) : 75Kgs Wheat Flour,10Kgs Dry Weight Beans (Red Kidney of Beans), 8 Liters Vegetable Cooking Oil (Mostly Imported), 2.5 Kgs Sugar and 1Kg Iodized Salt.



36,281 YER

FOOD IMPORTS COMMODITIES (SEA/LAND) PORTS

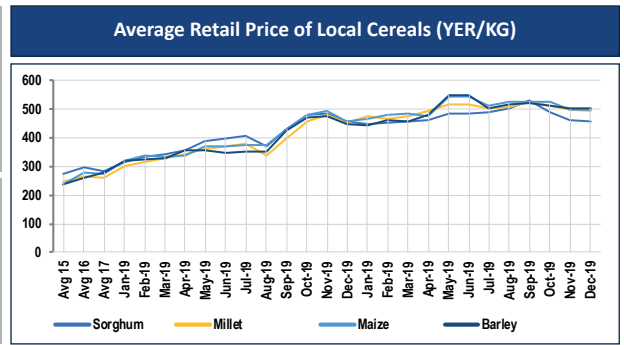
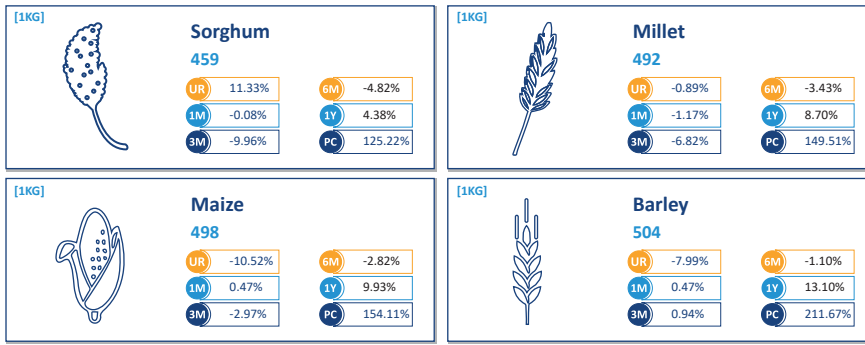
In total an estimated (6,124,285 MT) of various food items (wheat grains, wheat flour, sugar, rice, milk and cooking oil) were imported through the various maritime seaports of Aden, Al Hudaydah, Al Salif and Al Mukalla as well as the Land ports of Shahin & Wadie'ah during the period of (January – December 2019).Wheat grains constitute 48.6% of the total imports, followed by 14.5% for Sugar, 13.8% for Wheat Flour, 11.6% for Rice, 7.9% for Vegetable Cooking Oil and by 3.7% for Milk and its Products. It should be mentioned that, the accumulative share of Al Hudaydah and Al Salif seaports constitute 55.4% and during this month (December 2019) it received 256,986 MT of basic imported food, of which , only 5% (mainly Wheat Flour and Cooking Oil) were imported for humanitarian assistance.



LOCAL CEREALS

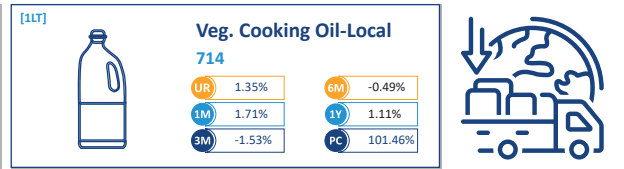
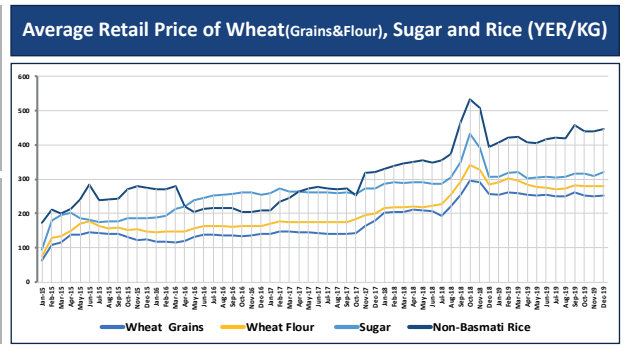
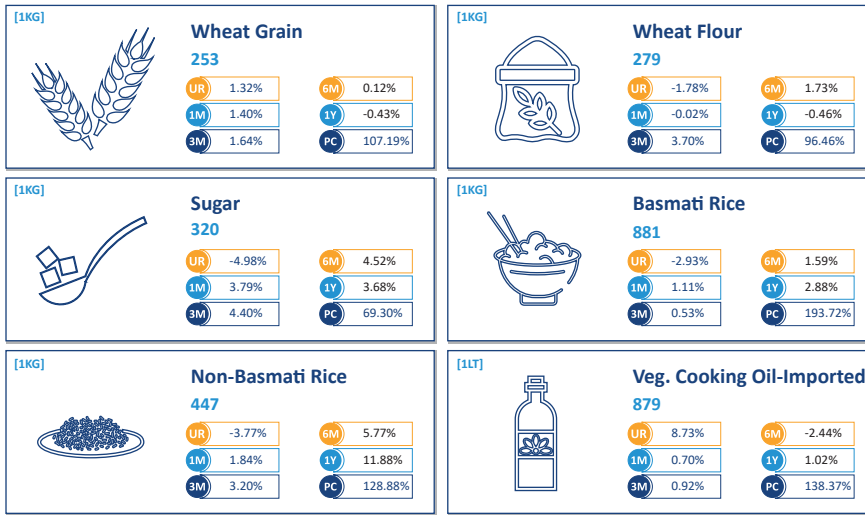
KEYS: **UR** Urban Vs. Rural **1M** Current Month Vs. Previous Month **3M** Current Month Vs. 3 Months Earlier
6M Current Month Vs. 6 Months Earlier **1Y** Current Month Vs. Year Earlier **PC** Current Month Vs. Pre-Crisis

National Average Retail Prices of Local Cereals During Dec-19.



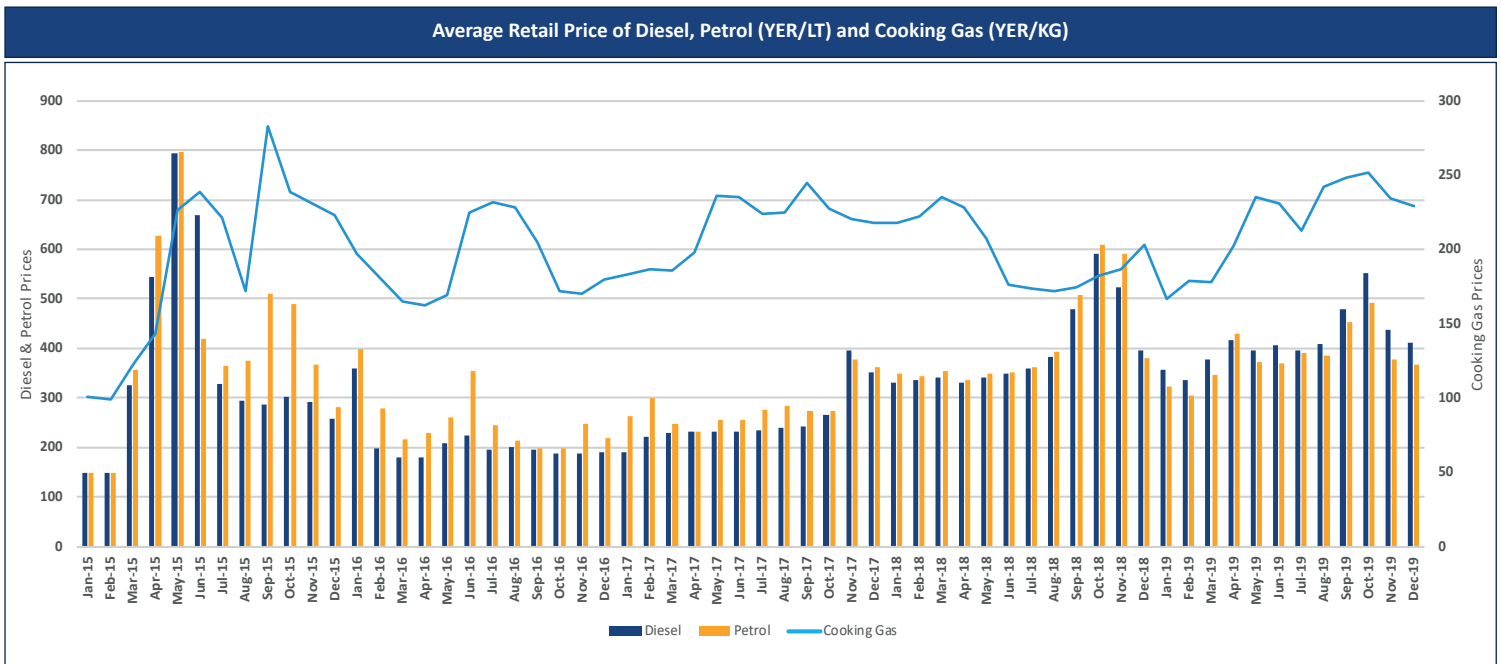
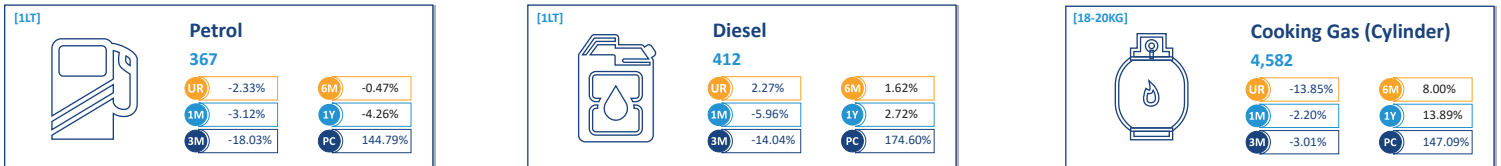
IMPORTED COMMODITIES

National Average Retail Prices of Imported Commodities During Dec-19.

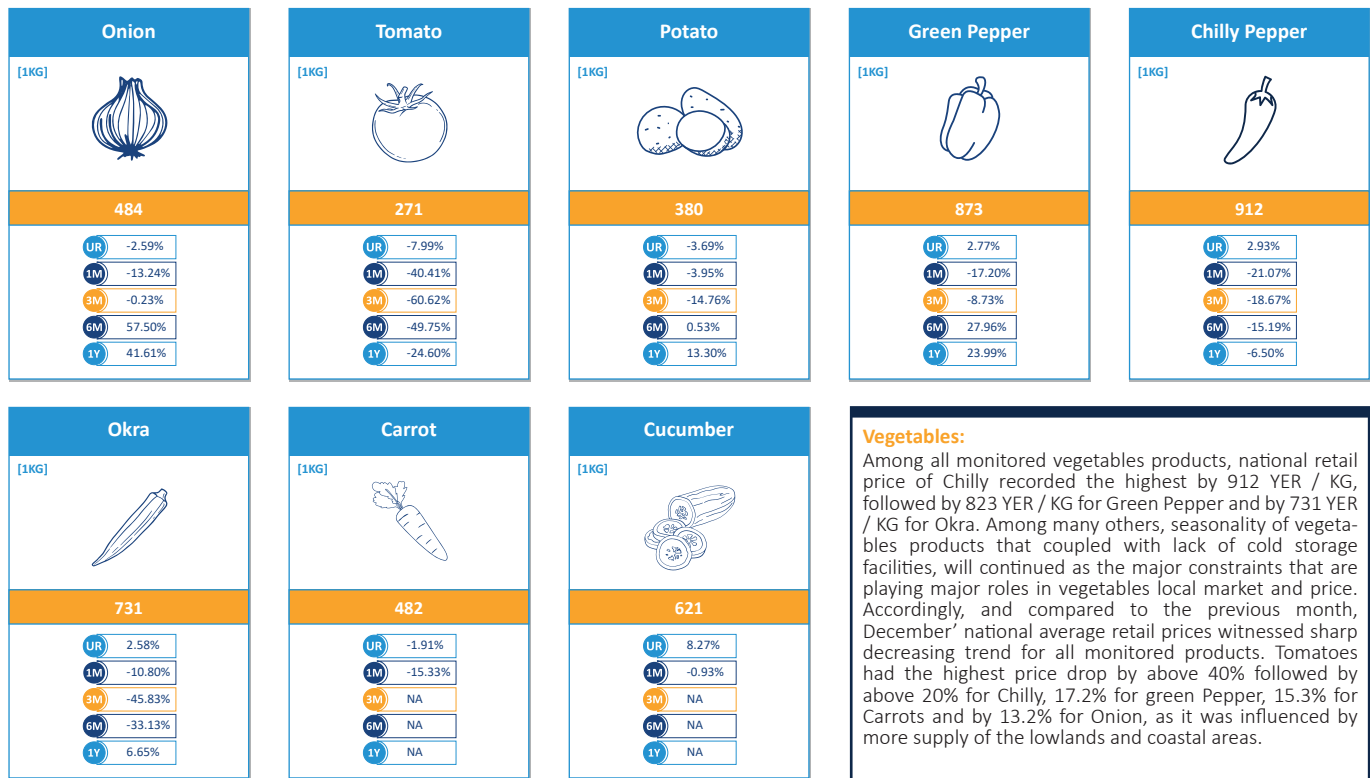


FUEL

National Average Retail Prices of Fuel During Dec-19.

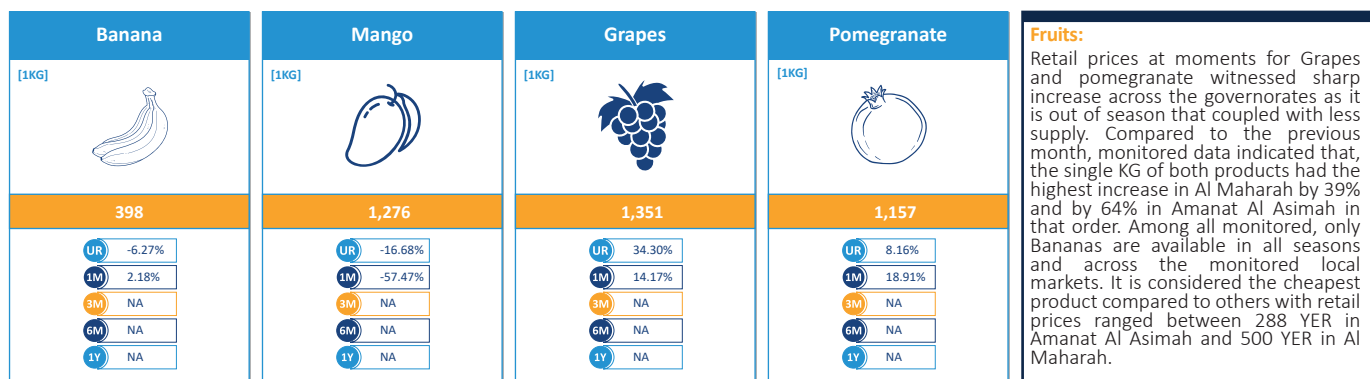


National Average Retail Prices of Vegetables During Dec-19.



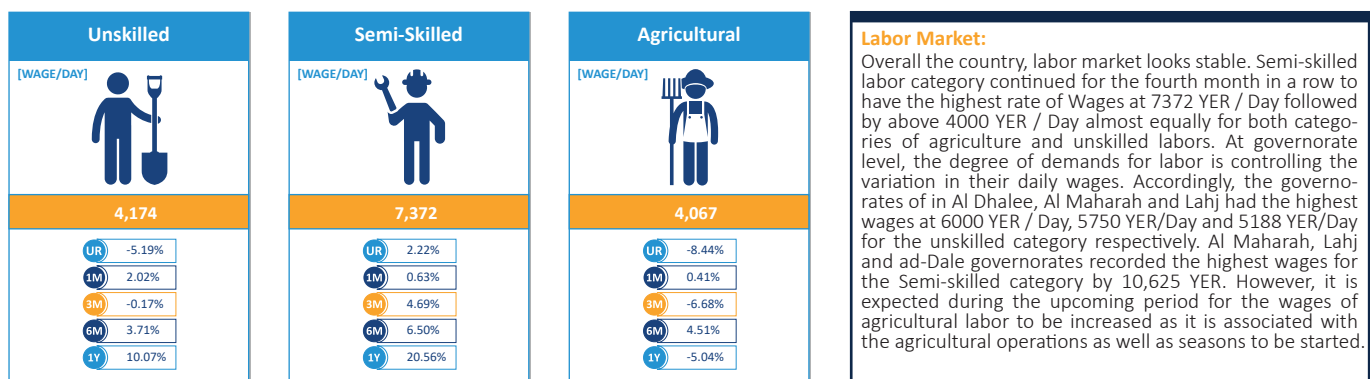
FRUITS

National Average Retail Prices of Fruits During Dec-19.

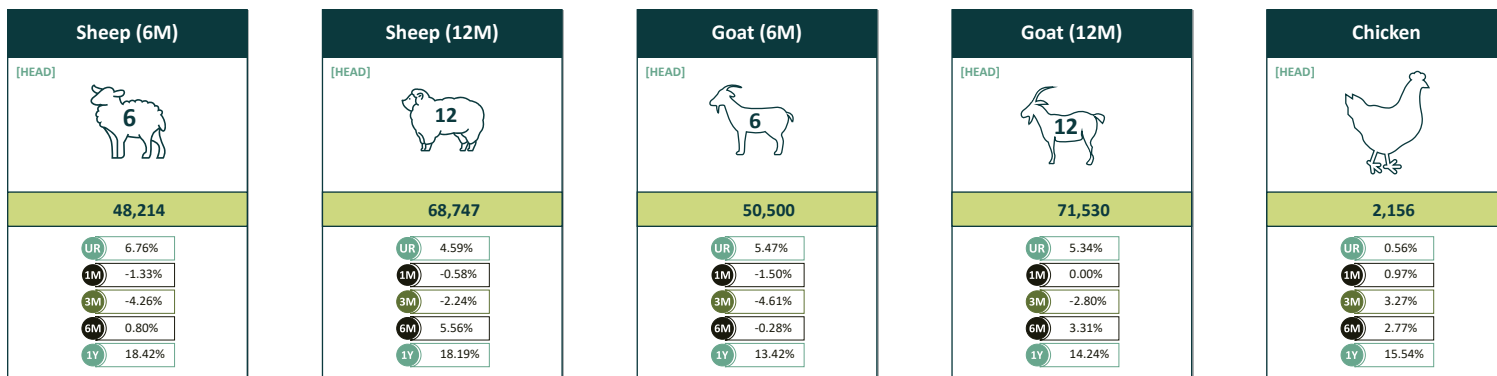


LABOR MARKET

National Average Labor Market Prices During Dec-19.

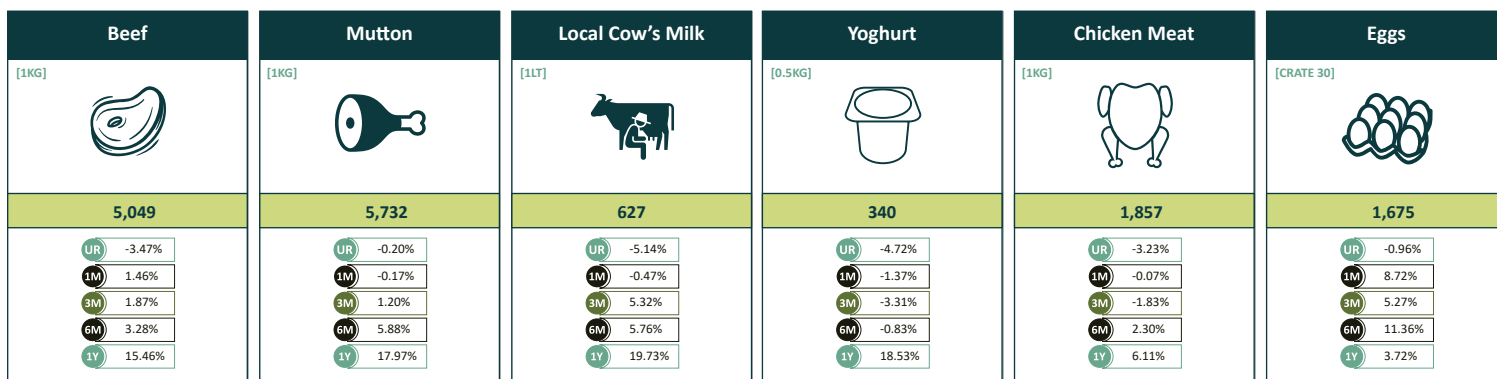


National Average Retail Prices of Animals During Dec-19.



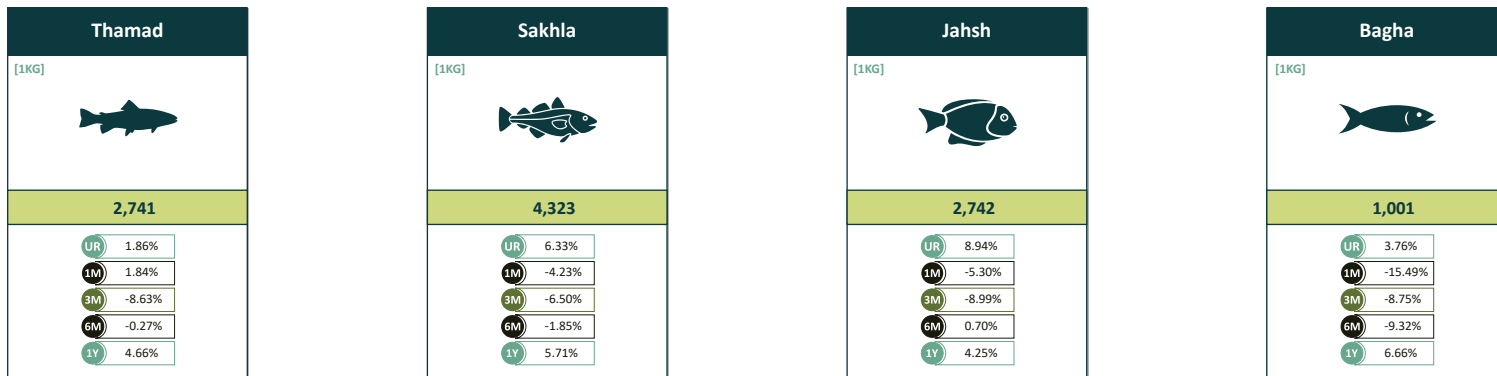
ANIMAL PRODUCTS

National Average Retail Prices of Animal Products During Dec-19.



FISH

National Average Retail Prices of Fish During Dec-19.



Livestock:

During December national average retail price of the single head of Goats (12 months old) had the highest by 71,530 YER, followed by the single head of Sheep (12 months old) at 68,747 YER. In general, Livestock market prices remained stable in December. Accordingly, the monthly retail prices of both monitored categories (Sheep and Goats) continued decline in most of the governorates. Among which, Lahj recoded the highest decrease by 12%, followed by, Al Mahwit by 9%, 5% in Raymah and equally by 3% in Amanat al Asimah and Hadramaut (Coast and Valley). At the same time the retail price of Goat (12 months old) remained stable in Sa'adah, Shabwah and Ad-Dale and recorded a slight increase by 8% equally in Lahj and Raymah. Retail price of live Chicken followed the same price trend of the live animals in most of the governorates. Compared to the previous month, Eggs average retail price witnessed a sharp increase by 15% in Al Bayda and Al Mahwit, followed by 14% in Hadramaut (Coast and Valley), and between 12% and 13% in Sa'adah, Al Hudaydah and Abyan respectively.

Animal Products:

At national level, and apart of Beef (increased by less than 2%) the retail prices of all other products went down in December compared to the previous month. Yoghurt recorded the highest price decrease by less than 2% and equally by less than 1% for the rest of Mutton, local cow milk and Chicken meat.

Fish:

During December and compared to the previous month, the national monthly average of retail prices of Sakhla fish type had the highest at 4323 YER / KG followed by 2741 YER / KG equally for Thamad and Jahsh types and the least for Bagha at 1001 YER/KG. Compared to the previous month, December's prices witnessed increased trends only for Thamad by 1.8% and declined price trends for all the rest three types which Bagha had the highest by nearly 16%. Among the monitored types of fish, Sakhla was the most scarce type that was unavailable across the most governorates and it was followed by Jahsh type.

COMMODITIES' PRICES AT GOVERNORATE LEVEL

Monthly Average Retail Price for the Basic Food and Non-Food Commodities During Dec-19.

Commodity Type	Commodity	Unit	Abyan	Aden	Al Bayda	Al Dhalee	Al Hudaydah	Al Maharah	Al Mahwit	Amanat Al Asimah	Amran	Dhamar	Hadramaut Coast	Hadramaut Valley	Hajjah	Ibb	Lahj	Raymah	Saada	Shabwah	Taiz	
Local Grains & Legumes	Sorghum Grain	1Kg	550	613	489	700	233	625	263	557	274	324	517	511	256	417	569	354	437	603	435	
	Millet Grain	1Kg	531	525	489	538	353	556	538	463	351	516	692	593	352	485	575	364	404	589	440	
	Maize Grain	1Kg	502	513	451	744	300	744	451	533	213	688	401	317	688	401	317	688	401	317	688	401
	Barley Grain	1Kg	600	575	582	606	619	625	315	554	233	419	550	763	442	415	500	298	412	636	439	
	Wheat Grain	1Kg	NA	631	764	NA	428	550	417	492	286	NA	325	533	259	363	NA	328	420	676	NA	
	Onion	1Kg	599	458	476	528	424	475	513	492	523	474	391	398	540	468	490	468	578	476	423	
Vegetables	Potato	1Kg	185	175	284	244	251	459	277	288	435	267	218	219	273	269	194	357	308	184	265	
	Green Pepper	1Kg	398	358	351	400	344	494	385	358	359	378	410	412	367	327	350	377	418	367	357	
	Chilly	1Kg	1,267	1,025	558	827	988	623	1,131	558	623	704	578	1,063	1,267	723	690	511	591	591	1,046	972
	Cucumber	1Kg	1,104	854	921	863	552	1,138	688	567	870	569	1,056	1,206	1,000	588	1,365	1,051	582	1,101	1,259	
	Carrots	1Kg	550	892	635	494	603	625	498	523	673	523	673	761	606	569	604	592	584	576	821	
	Okra	1Kg	638	542	432	569	405	647	410	291	613	484	291	613	484	291	613	484	291	613	484	
Fruits	Mango	1Kg	767	729	755	638	322	1,056	533	625	771	480	856	1,224	481	565	969	553	517	975	1,068	
	Banana	1Kg	1,200	NA	NA	NA	NA	1,325	NA	NA	NA	NA	1,355	NA	NA	NA	1,250	NA	NA	1,250	NA	
	Grape	1Kg	1,517	NA	NA	NA	800	2,000	NA	NA	NA	NA	1,500	NA	NA	1,500	1,213	925	NA	NA	NA	
	Pomegranate	1Kg	352	379	456	400	408	500	371	288	427	392	454	423	358	338	383	420	364	394	448	
	Beef	1Kg	1,500	1,325	1,050	NA	800	1,150	1,000	1,367	1,288	NA	1,188	1,231	NA	1,150	1,100	850	NA	NA	1,200	
	Mutton	1Kg	6,000	6,500	5,005	4,000	5,333	6,000	4,229	5,115	4,600	5,000	4,896	5,000	4,896	5,000	4,896	5,000	4,896	5,181	5,125	
Animal Products	Local Cow Milk	1lt	6,063	6,000	5,750	5,000	6,125	6,000	5,000	5,500	5,000	5,313	5,875	5,634	5,417	5,688	6,156	5,813	6,000	6,375	6,208	
	Yoghurt	0.5Kg	640	563	800	600	578	NA	NA	NA	222	759	612	NA	NA	750	538	542	1,200	544	533	
	Chicken Meat	1Kg	327	373	361	350	279	438	306	262	291	314	329	334	327	338	380	325	362	400	356	
	Egg	30 Eggs	1,700	1,421	1,957	2,500	2,136	1,706	2,063	1,758	1,892	1,622	1,323	1,722	1,571	2,125	1,517	1,723	2,698	1,375	2,477	
	Thamad	1Kg	1,675	1,692	1,688	1,775	1,607	1,748	1,700	1,533	1,691	1,684	1,708	1,678	1,700	1,571	1,704	1,720	1,536	1,725	1,687	
	Sakhla	1Kg	2,688	2,958	2,280	2,225	2,675	2,625	3,063	3,233	3,500	2,850	2,342	1,862	NA	3,604	3,417	1,050	2,313	2,844	3,804	
Fish	Bagha	1Kg	4,104	6,000	4,904	NA	3,147	5,000	2,438	3,867	3,667	3,832	6,000	NA	3,900	5,854	NA	NA	3,563	3,000	5,563	
	Jahsh	1Kg	1,219	1,422	756	NA	942	775	619	842	1,000	763	NA	1,350	763	NA	717	1,375	1,194	1,125	NA	
	Wheat Grains	1Kg	3,396	3,354	2,424	4,750	2,467	2,200	1,813	2,325	3,250	2,813	2,206	1,150	3,325	3,563	1,731	2,500	1,766	3,000	4,075	
	Wheat Flour	1Kg	238	260	249	350	220	275	217	282	205	250	255	268	229	298	230	298	227	230	259	304
	Beans	1Kg	254	273	281	300	249	270	270	281	300	273	293	272	300	272	300	259	259	284	316	
	Sugar	1Kg	837	825	781	650	786	866	829	496	674	713	750	955	638	810	642	488	442	866	969	
Imported Commodities	Rice Basmati	1Kg	339	329	328	400	281	313	302	263	311	316	325	297	325	316	304	312	342	361	361	
	Rice Non-Basmati	1Kg	845	898	913	900	857	869	846	1,029	937	947	741	850	871	900	963	884	784	743	968	
	Cooking Oil Imported	1lt	386	600	351	500	680	488	358	507	373	366	680	388	363	359	383	633	359	383	400	
	Cooking Oil Local	1lt	771	1,016	987	983	672	602	728	1,004	873	876	1,017	1,048	869	955	946	877	681	719	1,069	
	Diesel	1lt	630	788	938	797	642	NA	642	804	676	613	804	776	610	776	610	776	610	776	610	776
	Petrol	1lt	391	407	430	371	527	375	433	430	435	451	330	343	434	429	374	437	438	367	424	
Labor Market	Gas Cylinder	18-20 Kg	391	348	374	350	366	375	370	365	398	398	330	354	378	378	349	391	377	350	371	
	Casual / Unskilled Labor	Day	4,552	5,079	4,210	3,213	5,020	3,425	7,030	3,800	3,929	6,922	2,783	3,000	4,442	5,375	3,750	5,306	6,208	3,206	5,801	
	Agriculture Labor	Day	4,207	5,375	3,750	6,000	3,792	3,917	6,000	3,792	3,917	6,000	4,167	3,250	4,938	4,302	5,188	2,844	4,979	4,750	4,417	
	SemiSkilled Labor	Day	3,323	5,000	3,417	5,000	3,250	6,000	3,333	3,000	2,675	3,063	5,500	4,550	3,125	4,500	3,750	3,258	4,188	5,594	4,750	
	Sheep (6 Months)	Head	6,613	7,375	8,333	8,000	6,094	10,625	7,500	6,000	7,302	7,438	6,250	4,875	7,854	7,063	9,125	5,427	8,130	8,063	8,000	
	Sheep (12 Months)	Head	57,500	62,500	42,903	38,625	48,094	45,313	33,875	55,833	39,375	38,291	65,471	55,183	40,708	42,688	39,396	64,840	80,625	31,854	81,854	
Live Animals	Goat (6 Months)	Head	71,875	90,250	73,361	54,375	73,238	62,813	57,542	75,833	65,125	53,416	67,327	77,375	61,375	58,000	65,313	61,313	90,913	97,500	49,250	
	Goat (12 Months)	Head	62,083	67,500	40,528	42,500	52,656	54,688	36,875	56,000	40,042	37,675	65,833	61,173	41,875	45,188	41,146	64,365	80,000	34,271		
	Live Chicken	Head	17,252	16,875	68,750	60,875	77,500	55,063	75,500	61,917	51,906	79,188	76,204	62,000	62,875	65,833	60,521	85,832	96,500	59,896		
	Live Chicken	Head	2,284	2,291	1,677	2,469	2,255	2,563	1,748	1,638	2,070	2,333	1,813	2,608	1,760	2,420	2,420	2,420	2,420	2,420	2,353	
	Exchange Rate	Buy	594	595	582	599	584	596	581	581	574	583	586	587	582	584	586	586	582	600	587	
	MINIMUM / SURVIVAL FOOD BASKET		34,530	37,726	37,709	38,064	32,744	34,704	35,647	34,055	35,692	37,532	37,072	40,712	34,653	39,156	37,395	32,196	29,992	36,730	43,021	

AT GOVERNORATE LEVEL

- At the time of reporting, supply and availability of imported food and fuel commodities remained almost stable across the monitored markets. Compared to the previous month, supply chains of locally produced cereals witnessed slight shortages compared to the demands over the monitored main city markets in Amanat Al Asimah and Lahj resulted in sharp price increase by 18% and 10% for Sorghum and by 19% and 25% for Maize in that order. While the price trends went down between 5 and 10% in Ibb, Mahwit, Hajjah and Al Hudaydah. Seasonality of the monitored fish types disrupted its supply and availability situation. Amran Raymah and Hajjah were the most affected with scarcity of Thamad, Al Dhalee, Hadramaut (Mukalla), and Lahj with Sakhla. Among the targeted governorates, Amran, Raymah, Al Maharah, Al Dhalee and Al Mahwit were the most affected by shortages of agricultural inputs. While governorates of Dhamar, Amanat Al Asimah and Sa'adah recorded the best availability situation. Furthermore, prices of the key inputs (mainly vegetables seeds, and Chemical fertilizers) went up exponentially to reach alarming levels compared to the pre-crises and across the targeted governorates. Monthly average price of the last quarter of 2019, when compared to the pre-crises, showed a sharp increase exceeding 483% for tomatoes seeds, 283% for Onion, 299% for Chilly, 238% for Okra and by 74% for green Pepper. Similarly, the national retail price of chemical fertilizers of Urea and NPK has already exceeded 120% and 84%.
- Among all monitored imported food commodities Wheat grains and Flour in December witnessed a relative stability of their retail prices in Abyan, Al Dhalee, Al Marah, Al Hudaydah, Shabwah, Raymah, Taiz and Hadramaut (Mukalla). Compared to the previous month and due to the high fluctuation of the exchange rate (YER per USD), the average retail price of the locally processed Cooking Oil, imported Cooking Oil and Basmati Rice in Sayoun increased sharply by 50%, 38%, and 14% respectively. Monthly average retail price of Basmati Rice in Aden, Hajjah, Al Bayda, Raymah, Shabwah and Taiz unchanged in December and remained as of the previous month. While the Non-Basmati Rice in Abyan went up sharply by 29%, 30% in Sayoun and by 10% in Al Hudaydah.
- Under normal market systems, the prices of imported commodities show high price in the rural market compared to the main capital cities of the governorates. However, the trend is not the same across all districts and governorates. Generally, it varies due to various factors such as proximity 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.
- During December and compared to the previous month, average retail prices of Diesel, Petrol and Cooking Gas in Amanat Al Asimah Sana'a, and Al Maharah remained stable without changes. Similarly, Petrol retail price in Aden, Al Dhalee, Al Bayda, Al Maharah, Amanat Al Asimah, Amran and Hadramaut (Valley) unchanged and remained stable as of November. Cooking gas was decreased by 16% in Al Bayda, 9% in Al Mahwit 7% in Al Maharah and equally by 6% in Ibb and Taiz.

The Monthly Market Monitoring Bulletin

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