



MONTHLY MARKET MONITORING BULLETIN

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Background

The market data and information is collected from six FSIS Programme target Governorates through the Governorate Focal Units (GFU) and FSTS in Sana'a city. The prices are collected from Hodeidah, Hajjah, Dhamar, Hadramout, Lahej and Sanaa city markets. The prices collected from at least 3 representative market centers and average is calculated for each location. The Market monitoring bulletin provides tables and charts that shows the monthly prices in the targeted Governorate markets. It also provides and allow the users to compare the current prices with the previous month and the pre-crisis average.



Highlights

- Average prices of locally produced food commodities showed a slight decrease in February 2016 when compared to January 2016; however, the prices are still higher than the pre-crisis era in February 2015.
- The average prices of imported commodities in February 2016 showed a relatively stable status compared to previous months but still considered higher than the level of the pre-crisis era. Although the international export price of wheat has declined by 4% (FAO/FPMA), the domestic prices of imported commodities such as wheat did not show considerable changes. This is attributed to continued disruption of the international and domestic trade and market system in Yemen.
- There is a stable supply of vegetables to the local markets in the targeted governorates and the average prices are slightly lower than the previous months.
- Supply of animal products has improved which resulted in to stable prices in most targeted governorates.
- Seasonal weather, insecurity and restricted access to coastal areas plays major role in the fish production and marketing across the targeted governorates. Accordingly, the supply and availability of the common fish types are affected and the price significantly fluctuated.
- Fuel supply has slightly improved in the target governorates except in Lahaj. This is evident by the availability of fuel products in the parallel markets; however, the prices are still very expensive.
- The food security situation of the target governorates is still very precarious despite the relative improvement of the availability of key food commodities. Still, the economic access to food continued to be a serious challenge and expected to affect the food security outcomes of the food insecure population in the country.

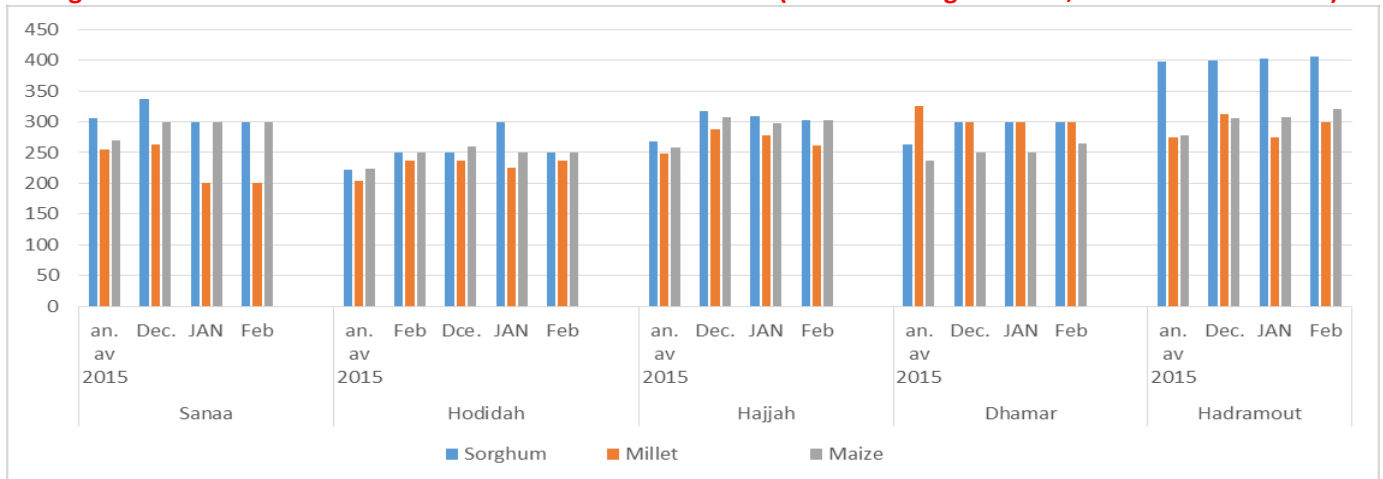
Monthly Average Prices of locally produced commodities

Cereals

Item	Month	Sanaa city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj
Sorghum	Jan	300	300	309	300	402	250
	Feb	300	250	303	300	406	250
Millet	Jan	200	225	278	300	275	250
	Feb	200	238	261	300	300	250
Maize	Jan	300	250	298	250	308	250
	Feb	300	250	303	265	320	250
Barley	Jan	300	238	276	250	300	250
	Feb	300	288	279	270	300	250
Faba – Beans	Jan	300	325	253	320	330	NA
	Feb	300	315	255	320	347	NA
Beans	Jan	538	416	375	425	340	400
	Feb	550	415	336	425	346	406
Lentils	Jan	469	425	410	500	479	500
	Feb	538	500	395	500	491	513

- The average price of sorghum was more or less stable in February 2016 compared to January 2016 in nearly all targeted governorates, except 17% decrease in Hodeida. However, the average prices of sorghum in February 2016 was much higher than the prices in the pre-crisis by 67% in Sana'a city and Dhamar, by 97% in Hodiadah and 78% in Hajjah.
- The average prices of millet, maize, and barley were more or less stable in February 2016 compared to January 2016. However, the price of barley increased by 21% in Hodaidah compared to January 2016. The average prices of the above-mentioned locally produced commodities is still significantly higher, ranging from 60% to more than 100%, compared to the prices of February 2015.
- The average prices of beans and faba-beans were stable in both January 2016 and February 2016 in nearly all targeted governorates. However, the average prices of beans and fab-beans show 29% to more than 60% increase compared to the prices of pre-crisis in most of the targeted governorates.

Fig. 1 .Price trends of the main stable local food commodities (Annual average of 2015, Dec 2015 – Feb 2016)





Imported food commodities

Commodities		Governorates					
		Sana'a city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj
Wheat	Jan	123	110	99	120	143	118
	Feb	120	103	100	120	131	128
Wheat flour	Jan	153	140	134	150	150	146
	Feb	150	135	150	150	150	145
Sugar	Jan	200	178	198	200	188	171
	Feb	205	185	201	203	184	185
Rice	Jan	300	350	275	300	285	361
	Feb	303	340	276	300	282	350
Veg. oil	Jan	615	350	400	435	327	438
	Feb	571	350	403	406	328	438

- The average price of wheat showed a slight decrease in February 2016 compared to January 2016 in some governorates. The decrease ranged from 2% in Sana'a city, 8% in Hadramout and 7% in Hodaidah while it remained stable in Dhamar and a slight increase by 9% in Lahej and 1% in Hajjah.
- The average price of wheat flour remained stable in February 2016 when compared to January 2016 in Dhamar and Hadramout. However, the average price of wheat flour increased in February 2016 compared to January 2016 in Hajja (12%) and decreased by 4% during the same period in Hodaidah. However, compared to February 2015, the average price of wheat flour increased from 7% in Hadramout to 50% in Hajjah while it remained stable in Dhamar.
- The average price of sugar showed some fluctuation in February 2016 compared to January 2016. Compared to the prices of January 2016, the average price of sugar increased by 3% in Sana'a city, 4% in Hudaidah, 2% in Hajja, 8% in lahej and 1% in Dhamar. Among others, the price fluctuation could be attributed to the exchange rate fluctuation of Yemeni Rial against the US Dollar. Moreover, the price of sugar is still significantly higher than the pre-crisis¹ by 28% in Sana'a city and 19% in Dhamar and 1% to 4% in the other target governorates.
- The average prices of rice were more or less stable in February 2016 when compared to January 2016. However, the average prices of rice showed a significant increase by 102% in Sana'a city, by 100% in Dhamar and by 84% in Hajja compared to the pre-crisis.
- The average price of cooking oil was more or less stable in February 2016 compared to January 2016. Never the less, compared to the prices in the pre-crisis era, the average price showed significant increase in Sana'a city by 76% and 31% in Hadramout.

Vegetables

Table 3: Average Prices of vegetables (YR/Kg) Jan.-Feb 2016

Commodities	Month	Sana'a city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj
Onion	Jan	288	213	316	225	171	215
	Feb	225	163	238	158	188	191
Tomato	Jan	275	238	288	263	218	177
	Feb	300	225	250	280	262	242
Potato	Jan	288	250	275	300	317	265
	Feb	300	275	288	310	283	283
Pepper	Jan	400	300	838	400	463	389
	Feb	400	263	575	350	555	329

- The average price of onion showed a decrease in February 2016 compared to January 2016 in five targeted governorates, while increased by 10% in Hadramout. This decrease is attributed to the increased production in February in many agricultural areas and the increased supply to the local market. Furthermore, the restriction/blockage of exports to neighboring countries contributed for increased supply to the local market.
- The price of tomato showed a slight decrease in the governorate of Hodaidah, Hajjah and a slight increase in Sana'a city, Dhamar, Hadramout and increased by 36% in Lahej.
- The average price of potato showed an increase in most targeted governorates. However, the average price of potato has decreased by 11 % in Hadramout.
- The average price of pepper was stable in Sana'a city and decreased in the other targeted governorates while the price significantly reduced by 31% in Hajjah.

Fisheries

Table (4) : Availability & Average price of common fish types (YR/Kg), Jan.-Feb 2016

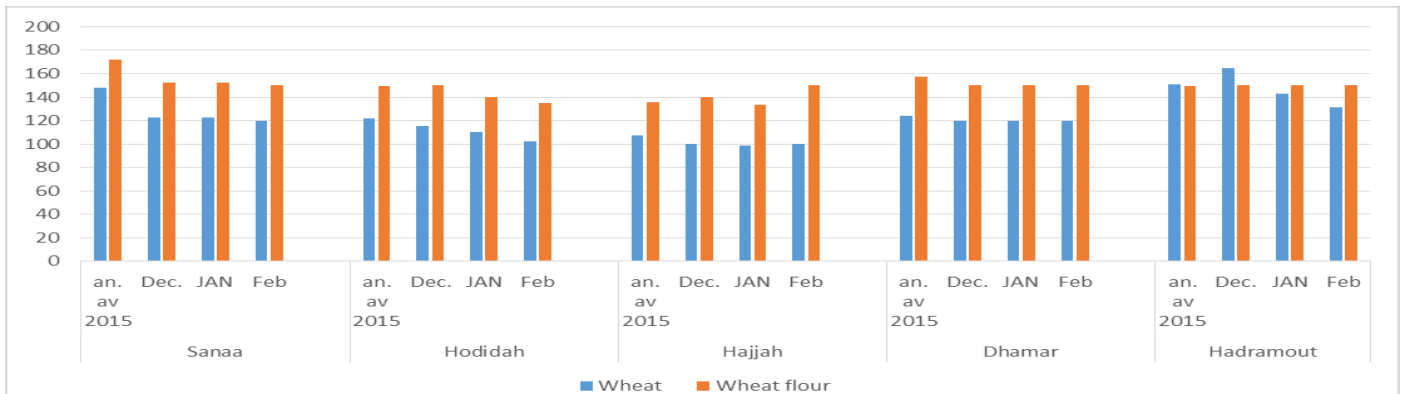
Governorates		Common Fish Types			
		Thamad	Sakhla	Bagha	Jahsh
Sana'a city	Jan	2375	2350	625	1425
	Feb	2500	2500	775	1725
Dhamar	Jan	NA	2400	575	1650
	Feb	1950	2833	663	1800
Hodeidah	Jan	NA	1425	575	1400
	Feb	NA	1425	538	1475
Hadramout	Jan	1321	3320	550	925
	Feb	1008	2592	487	945
Hajjah	Jan	1663	1755	365	1400
	Feb	1775	1775	413	1513
Lahj	Jan	1900	NA	460	879
	Feb	1875	NA	502	858

- The average price of Tamad ranged from 2500 YR to 1008 YR in Sana'a city and Hadramout respectively. During January and February, Tamad fish was not widely available in Hodeida and Dhamar.
- The average price of Sakhla fish ranged from 1425 YR in Hudaida to 2833 YR in Dhamar. Sakhla fish appeared to be available in all targeted governorates with varying degrees of prices. The price variation is mainly due to the supply and demand factors and proximity to the main fish markets.
- Bagha fish is a variety considered accessible to the low income households. The relatively cheap price per unit weight allows poor segments of the society better access to Bagha fish in the local markets.
- The Jahsh fish type is considered a fish which is very popular in urban areas in local restaurants. Among others, Sana'a, Dhamar and Al-Hudaida are main centers for marketing Jahsh type fish. The prices of Jahsh considerably vary depending on the availability and purchasing capacity of the population and the storage capacities of the refrigerators in the market centers.
- Prices of different types of fishes in the targeted governorates are mainly related to the season and the proximity to the local markets as well as the storage facilities available as well as the security along the highways connecting governorates.

¹ Please note that the pre-crisis era is referenced to February 2015.



Fig. 2 Price trends of the main imported food commodities (Annual average of 2015, Dec 2015- Feb 2016)



Livestock and livestock products

Table 5 : Average price of animal products (YR/Kg) Jan.-Feb 2016

Commodities		Sana'a city	Hodeidah	Hajjah	Dhamar	Hadramout	Lahaj
Beef	Jan	2000	2500	2263	2000	NA	NA
	Feb	2000	2500	2275	2000	NA	NA
Mutton	Jan	2500	2500	2400	2500	3055	2500
	Feb	2500	2500	2375	2500	3000	2500
Milk (liter)	Jan	300	400	393	350	345	1900
	Feb	300	400	364	350	350	1900 ²
Chicken meat	Jan	840	1025	1063	850	675	856
	Feb	750	1000	1075	738	633	819
Eggs 30/pack	Jan	900	938	908	880	931	894
	Feb	900	913	895	900	992	931

- The average price of beef remained more or less stable in February 2016 when compared to January 2016. It must be noted that beef is not popular in both Hadramout and Lahej.
- The average price of mutton was stable in February 2016 when compared to January 2016. There was no significant price difference in the different governorates.
- The overall price of milk was stable within the governorates compared to the previous months. There is a different on the unit price of milk among governorates depending on the availability of dairy farms.
- The average price of chicken meat ranged from 633 YR to 1075 YR per Kg.
- The fluctuation in prices of animal products is mainly related to the seasonal rainfall and improved production and supply of the products to the local markets.
- The average price of a pack of thirty eggs ranged from 800 YR and 900 YR. The prices in January and February 2016 did not show considerable difference.

Table 6 : Average price of live animal (YR/Head), Jan.-Feb 2016

Commodities	month	Governorates					
		Sana'a city	Hodeid.	Hajja	Dhamar	Hadramout	Lahaj
Sheep/6 month	Jan	23000	16000	12075	18125	19000	20188
	Feb	22500	15500	12575	18750	20000	21250
Sheep/12 month	Jan	31250	26500	23125	26125	29000	31000
	Feb	30250	26000	23250	27250	30000	NA
Goat /6 month	Jan	26000	19500	11300	19125	22500	24500
	Feb	24750	17000	11550	20375	25000	24000
Goat/12 month	Jan	34750	29500	22125	27000	32500	NA
	Feb	34000	27250	22000	28250	35000	NA
Chicken (live)	Jan	1025	813	950	1100	NA	975
	Feb	1175	863	970	1138	NA	931

- The average prices of six months old sheep in February 2016 showed a slight fluctuation when compared to January 2016. This was evident in Hadramout and Lahej, while there was a slight decrease in average prices in Sana'a city and Hudaida. This variation reflects the seasonality and the supply and demand of this commodity.
- The average price of 12 months old sheep showed similar trend in most targeted governorates. 12 months old sheep was not widely available in Lahej governorate markets. Reportedly, local population prefer young sheep than 12 months old ones. Moreover, producers continued keeping the fattened sheep for the big festivals such as Ramadan, which will be sold in higher prices.
- The average prices of the 6 and 12 months old goats showed similar trend.
- The average prices of live chicken ranged from 863 YR in Hodeida to 1175 YR in Sana'a city. The price of chicken in February 2016 did not show considerable difference from January 2016. The increase or decrease in average prices is minimal.

² The average price of Milk in Lahej is the price of one kg of powdered milk



Table 7 : Average price of fuel (Diesel and Petrol) (YR/Ltr), Jan.-Feb 2016							
Commodities		Governorates					
		Sana'a city	Hodeida	Hajjah	Dhamar	Hadramout	Lahj
Diesel	Jan	208	183	194	200	165	244
	Feb	178	194	173	175	145	296
Petrol	Jan	294	333	306	303	200	244
	Feb	269	294	276	263	188	292
Cooking gas	Jan	3200	4375	3325	3525	3213	3650
	Feb	3038	3500	3175	3275	3000	3475

- The average price of diesel in the parallel market showed a slight decrease in Sana'a city, Hajja, and Hadramout. At the same time, average prices of diesel showed an increase in Hodeida by 6% and by 21 % Lahej.
- The average price of petrol decreased in the parallel market in nearly all targeted governorates except in Lahej, which has increased by 20% compared to January 2016. The significant price increase in Lahaj is related to scarcity and reduced supply of the commodity due to insecurity in the governorate and spillover effect of the heavy fighting in Taiz governorate.
- The current average prices of diesel and petrol compared to the pre-crisis era showed significant increase by 29% for diesel and

76% for petrol and fluctuates on a daily basis. This is mainly because of the supply and demand and the forces controlling the parallel market.

- The average price of a cylinder (18Kg) of cooking gas has slightly decreased by 9% when compared to the average price of January 2016. This is mainly because of the improved supply and availability in the local markets of the target governorates. The price of a cylinder cooking gas in February 2016 ranged from 3000YR to 3500 YR per cylinder. It must be noted that these average prices are much higher than the average prices of the pre-crisis era in February 2015 that reached to more than 100%.

Fig.3. Prices trends of Cooking gas (YR/Cylinder) (Annual average of 2015, Dec 2015 – Feb 2016)

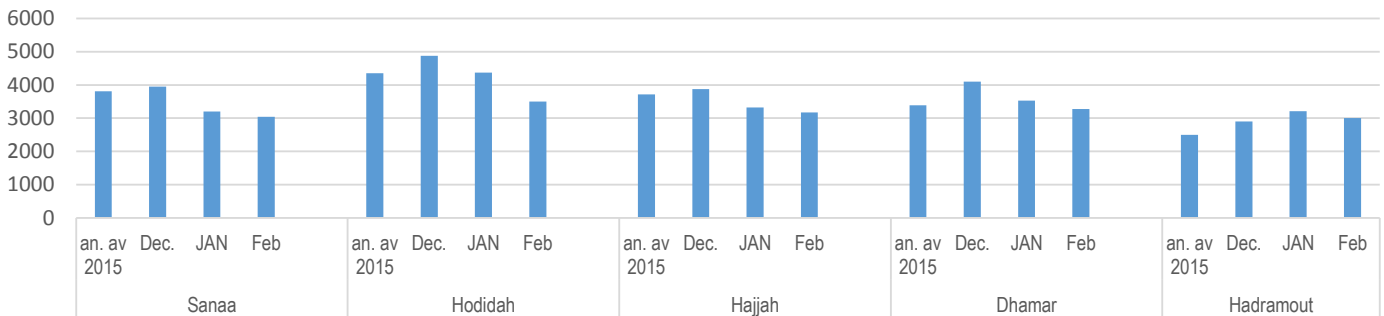
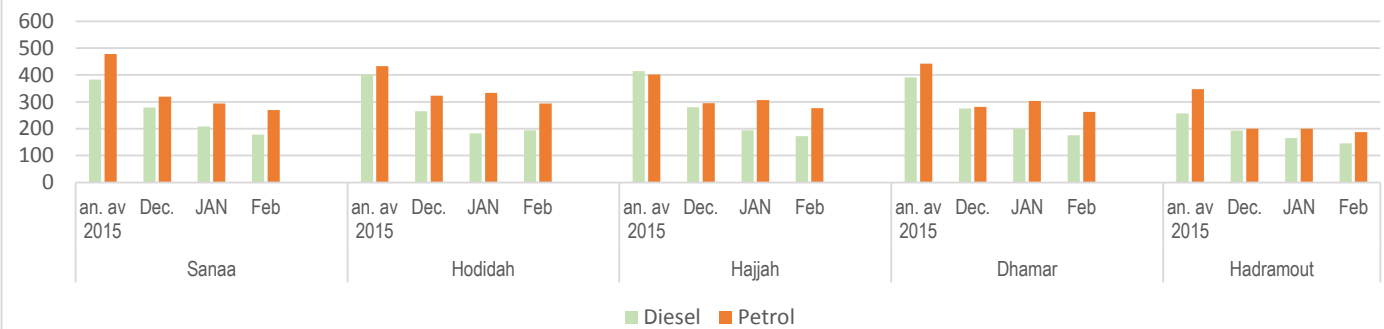


Fig.4. Prices trends of petrol and diesel YR/Lt (Annual average 2015, Dec 2015- – Feb 2016)



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