

## MONTHLY MARKET MONITORING BULLETIN

**Issue Number: 3**

**October 2015**

### Background

The market data and information is collected from six FSIS Programme target Governorates through the Governorate Focal Units (GFU) and FSTS in Sanaa city. The prices are collected from Hodeidah, Hajjah, Dhamar, Hadramout 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

- A slight decrease in the average price per kg of wheat was noticed in October compared to September nearly all targeted governorates. However, these average prices are significantly higher than the average prices of wheat in the pre-crisis era in February 2015.
- The monthly average retail price of the local cereals in Sana'a and Dhamar has no changes between October and September while a slight changes in Hajjah, Hodeidah and Hadramout. However, there is a significant increase in the prices of sorghum and millet reaching more than 90% compared to the pre-crisis era in February 2015.
- The production and supply of vegetables to the market is affected due to the onset of the winter season mainly in the central high lands.
- There was a slight increase in the price of a liter of diesel in October compared to September 2015 in most targeted governorates. The average price of petrol remained more or less the same in October, as was the case in September. A sharp decrease in the average price of 18 Kg cylinder cooking gas, where it has decreased between 37 and 33 in Sana'a and Dhamar respectively. However, these prices are higher than the prices of the pre-crisis era in February 2015. The increase ranges from 83% in Hadramout to more than 200% in the other targeted governorates.
- The exchange rate of Yemeni Rial has declined against the US Dollar – from 215 to 300 Rial/US dollar. As a result, the purchasing power of Yemeni Riyal against US Dollar is declining creating an extra price raise of key food commodities in the local market.
- October is beginning of the harvesting season for cereals (sorghum, wheat and barley) and fruits (orange, coffee, pomegranates and grapes) in the central highlands of Dhamar, Sana'a and the mountainous part of Hajjah. The demand for seasonal labor will increase and provide employment opportunity and income for the rural labor force.

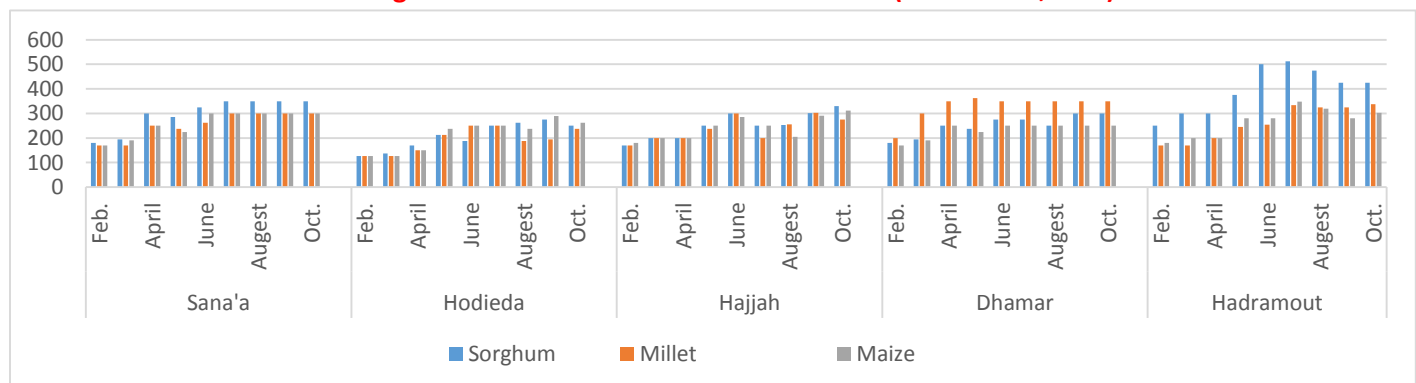
### Monthly Average Prices of locally produced commodities

#### Cereals

Table 1 : Average price of locally produced cereals (YR/Kg), Oct. /Sept. 2015						
Item	Month	Sanaa	Hodeidah	Hajjah	Dhamar	Hadramout
Sorghum	Sep	350	275	301	300	425
	Oct	350	250	330	300	425
Millet	Sep	300	195	303	350	325
	Oct	300	238	275	350	338
Maize	Sep	300	290	291	250	280
	Oct	300	263	312	250	303
Barley	Sep	375	283	272	200	300
	Oct	375	258	280	200	338
Faba – Beans	Sep	413	256	293	300	381
	Oct	400	250	268	300	388
Beans	Sep	413	256	293	333	413
	Oct	450	288	352	400	438
Lentils	Sep	450	500	411	500	500
	Oct	450	500	386	450	500

- The prices of sorghum showed slight decline in Hudaida and slight increase in Hajja. Prices of sorghum and millet were more or less stable in October compared to September in Sana'a, Dhamar and Hadramout. The fluctuation in prices ranged from 0% to 9% and 22% in Hudaida and Hajja respectively. However there is a significant increase in the prices of sorghum and millet reaching more than 90% compared to the pre-crisis era in February 2015.
- The same trend in slight increase or decrease was also noticed in maize and barley in Hajja and Hudaida. While the prices of these commodities was more or less stable in Sana'a, Dhamar and Hadramout. However, there is a significant increase in prices of maize and barley ranging from 80% to more than 100% in nearly all targeted governorates when compared to the pre-crisis era in February.
- A slight increase in price of beans was registered compared to September in majority the governorates. However, prices of these commodities were much higher than the prices of the pre-crisis era in February. The increase in prices ranged from 50% to above 100%.

**Fig. 1 .Price trends of the main stable food (Feb. – Oct. ,2015)**



**Imported food commodities**

**Table 2 : Average price Imported food commodities (YR/Kg), Oct. /Sept. -2015**

Commodities		Governorates				
		Sanaa	Hodeidah	Hajjah	Dhamar	Hadramout
Wheat	Sep	150	123	117	153	160
	Oct	148	110	109	135	158
Wheat flour	Sep	165	160	146	170	150
	Oct	170	150	141	150	150
Sugar	Sep	180	168	160	180	195
	Oct	185	180	193	195	180
Rice	Sep	200	300	166	200	275
	Oct	308	313	264	300	320
Veg. oil	Sep	416	309	453	412	270
	Oct	597	373	428	416	300

- A slight decrease in the average price per kg of wheat was noticed in October compared to September nearly in all targeted governorates. This decrease ranged from -2 % to -11% in the different targeted governorates. However, these average prices are significantly higher than the average prices of wheat in the pre-crisis era in February 2015
- Prices of wheat flour showed slight increase in Sana'a reaching 3%. While prices in Hudaida, Dhamar, Hajja and Hadramout showed slight decrease ranging from -6% in Hudaida , -3% in Hajja and -12% in Dhamar. It must be noted that the prices of wheat and wheat flour were significantly higher when compared to the pre-crisis era in February 2015. The price increase ranged from 13% in Sana'a to 41% in Hajja.
- The average price of sugar showed slight increase in October 2015 in most targeted governorates when compared with September 2015..Hadramout showed slight decrease in prices of sugar in October compared to September 2015.
- The average price of cooking oil in October compared to September was higher in Sana'a ( 44%) and slightly higher in Hudaida and Hadramout ( 7% and 11% respectively). However, comparison of prices of October 2015 with February 2015 ( pre-crisis month) revealed a significant increase ranging from 8% in Hudaida to 84% in Sana'a.
- The average prices of rice is significantly higher in October compared to September in most targeted governorates. The increase in price average ranged between 4% in Hudaida to 59% in Hajja. The reason of this increase is the shift of consumers to expensive rice available after the gradual fading out of cheaper rice in the market. It must be noted that the October prices of rice are significantly higher when compared to the prices of the pre-crisis era in February. The increase in price of rice ranges from 4% in Hudaida to more than 100% in Sana'a and Dhamar.

**Vegetables**

**Table 3: Average Prices of vegetables (YR/Kg) Sept - October-2015. 201**

Commodities	Month	Sanaa	Hodeida	Hajjah	Dhama	Hdrmout
Onion	Sep	275	263	286	263	263
	Oct	338	358	362	400	388
Tomato	Sep	300	325	355	350	488
	Oct	400	350	383	463	538
Potato	Sep	300	300	321	288	313
	Oct	300	275	318	338	331
Pepper	Sep	450	550	938	513	731
	Oct	650	825	808	650	863

- The prices of vegetables in particular, onion and tomatoes, showed an increase in October compared to September 2015. The magnitude of this increase ranged from 23% to 52% for Onion in all local markets in the targeted governorates while the price of tomatoes increased by 33% in Sana'a, 32% in Dhamar and 10 % in Hadramout.
- There was a sharp increase in the monthly average price of paper in the month of October comparing to September, where it rose up to 44% in Sana'a, 50% in Hodeidah and 27 % in Dhamar.

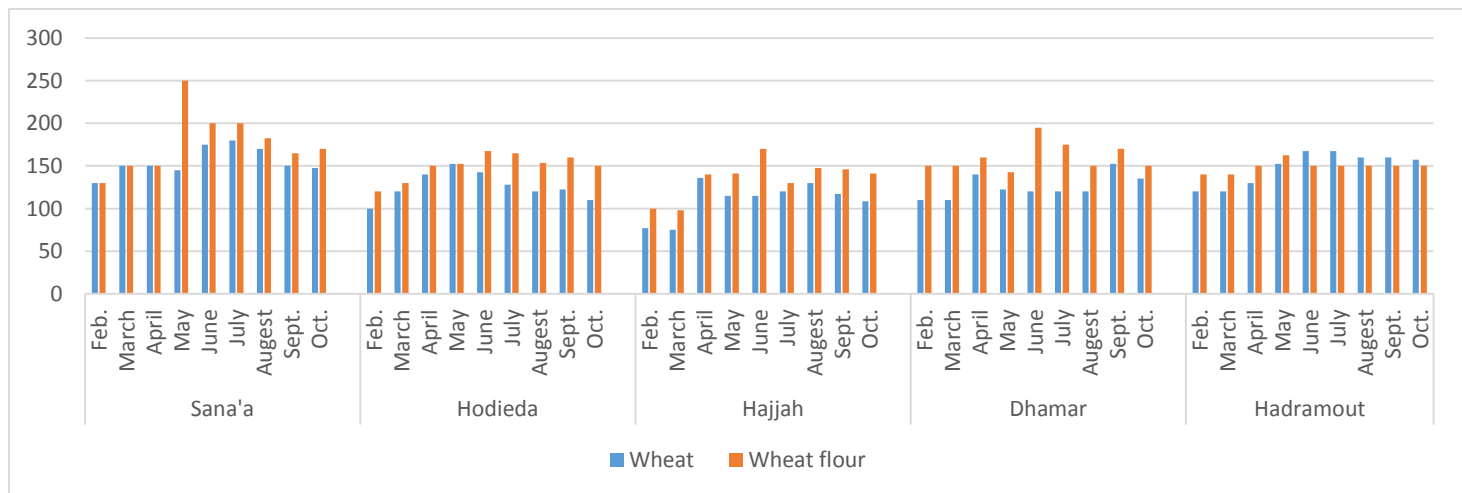
**Fisheries**

**Table (4 ) Availability & Average price of fish common types (YR/Kg), Oct. /Sept. 2015**

Governorates		Common Fish Types		
		Thamad	Sakhla	Jahsh
Sana'a	Sep	1750	1733	1275
	Oct	1550	1625	1450
Dhamar	Sep	NA	3000	1750
	Oct	2600	2900	1800
Hodeidah	Sep	NA	1725	1500
	Oct	1500	1925	1500
Hadramout	Sep	1325	4400	900
	Oct	1200	4200	988
Hajjah	Sep	2050	2195	1738
	Oct	1867	2050	1658

- Average prices of Thamad in October 2015 were high in Sana'a and Dhamar compared to September. Prices were moderate in Hudaida and Hadramout during October as compared to September. A slight decrease in average prices was noticed in Hajja.
- Average prices of Sakhla were stable in October 2015 compared to September. Fluctuation of prices is slight in most targeted governorates.
- The average price of Gahsh is more or less stable in October 2015 compared to September 2015. The price difference of Gahsh in Hadramout is almost 50% lower than in other targeted governorates.

**Fig. 2. Price trends of main imported food commodities (Feb. – Oct. ,2015)**



### Livestock and livestock products

**Table 5 : Average price of animal products (YR/Kg) Oct. -Sept.-2015**

Commodities		Governorates				
		Sanaa	Hodeidah	Hajjah	Dhamar	Hadramout
Beef)	Sep	2000	2500	2050	2000	NA
	Oct	2000	2500	2233	2000	NA
Mutton	Sep	2500	2500	2075	2500	3500
	Oct	2500	2500	2300	2500	3200
Milk (liter)	Sep	300	305	443	450	413
	Oct	300	350	444	450	355
Chicken meat	Sep	1163	1000	1161	975	825
	Oct	1025	1025	1171	963	863
Eggs 30/pack	Sep	900	900	1033	925	1000
	Oct	863	888	933	863	869

- The average price of one kg beef was more or less stable in all targeted governorates in October 2015 compared to September of the same year. The exception was in Hajja where the price of one kg was slightly higher in October than September 2015.
- The price of mutton was stable in nearly most targeted governorates. The exception was in Hajja and Hadramout where a slight increase was witnessed in Hajja and a slight decrease was noticed in Hadramout.
- The price of a liter of milk was stable in October in three targeted governorates when compared to September. There was a slight increase in the price of a liter of milk in Hudaida and a slight decrease in the price of the same commodity in Hadramout.
- The average price of one kg chicken meat slightly increased in Hudaida , Hajja and Hadramout. On the other hand there was a slight decrease of the same commodity in Sana'a.

**Table 6 : Average price of live animal (YR/Head),Oct. -Sept. ,2015**

Commodi	mon ths	Governorates				
		Sanaa	Hodeid.	Hajja	Dhamr	Hadramout
Sheep 6 month	Sep	26500	16250	22000	22875	20000
	Oct	24000	15000	18125	24125	19000
Sheep 12 month	Sep	-	-	-	-	-
	Oct	30000	23000	21500	28000	28000
Goat / 6 month	Sep	26500	18250	21000	24500	23500
	Oct	24500	18750	17125	22500	22500
Goat 12 month	Sep	-----	-----	-----	-----	-----
	Oct	34500	26000	19750	27500	30000
Chicken (live)	Sep	1200	775	1013	1350	NA
	Oct	888	863	1075	1200	NA

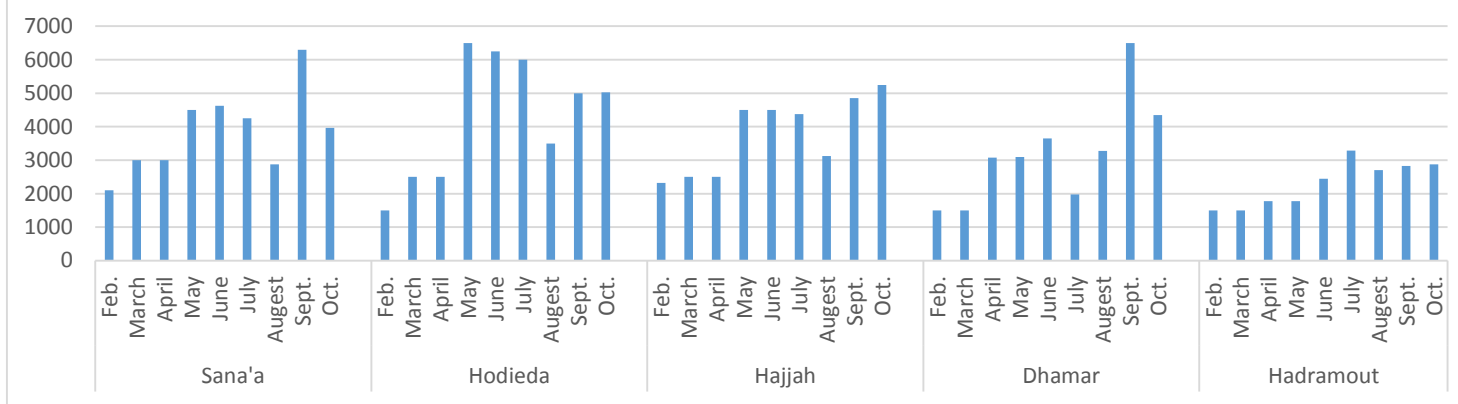
- The price of six month old sheep was slightly lower in most governorates in October compared to September. It must be noted that the price of six month old sheep in Hudaida is lower than other targeted governorates. It must be noted that the price of six month old sheep is lower than the average price of the same commodity in most governorates before the pre-crisis February 2015.
- The price average of 12 month old sheep ranged from 21000 YR in Hadramout to 30000 YR in Sana'a.
- Average price of six month old goat was slightly lower in October than September. The slight decrease in prices of goat could be related to the less demand for goat meat after the celebration of Eid.
- The average price of 12 months old goat ranged from 19750 YR in Hajja to 34500 YR in Sana'a in October 2015.
- The average price of live chicken showed a slight decline in October 2015 compared to September 2015. This was evident mostly in Sana'a where the average price declined from 1200 YR in September to 888Yr in October 2015.

**The Table 7 : Average price of fuel (Diesel and Petrol) (YR/Ltr), Oct. /Sept. 2015**

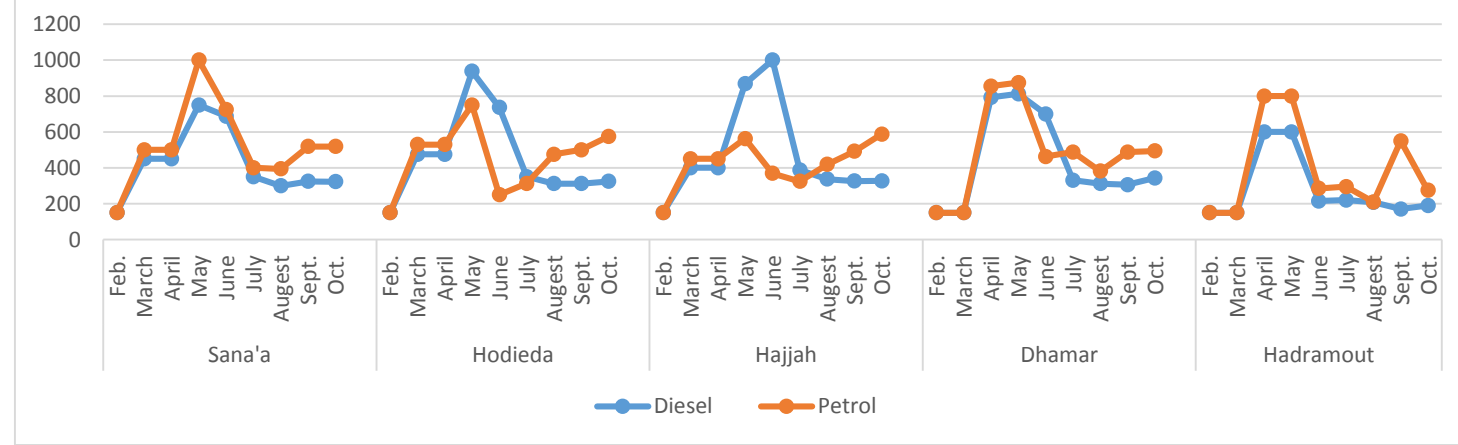
Commodities		Governorates				
		Sanaa	Hodeidah	Hajjah	Dhamar	Hadramout
Diesel	Sep	325	313	326	306	170
	Oct	323	325	327	344	190
Petrol	Sep	519	500	493	488	550
	Oct	519	575	588	494	275
Cooking gas	Sep	6300	5000	4850	6500	2825
	Oct	3963	5025	5250	4350	2875

- There was a slight increase in the price of a liter of diesel in October compared to September 2015 in most targeted governorates. It must be noted that the price of diesel in Hadramout is nearly half the price in other governorates(170 Yr-190Yr per liter)
- It must be noted that these prices of diesel are of the parallel market. When these prices are compared with the pre-crisis era in February 2015 it appears that there is a price increase in diesel ranging from 27% in Hadramout to more than 200% in most other governorates.
- The average price of petrol remained more or less the same in October as was the case in September. However these prices are higher than the prices of the pre-crisis era in February 2015. The increase ranges from 83% in Hadramout to more than 200% in the other targeted governorates.
- A sharp decrease in the average price of a cylinder of cooking gas from (6300 YR/Cylinder in September to 3963 YR /Cylinder in Sana'a in October. In the other targeted governorates the average price per bottle ranged from 4300 YR to 5000 Yr. The exception is in Hadramout where the average price in both September and October did not change and was around 2850YR. It must be concluded that these prices are of the parallel market. When compared to the average price in the pre-crisis era in February there is a drastic increase in all targeted governorates ranging from 92% in Hadramout to more than 200% in Hudaidah.

**Fig.3. Prices trends of Cooking gas (YR/Cylinder) (Feb. – Oct.,2015)**



**Fig.3. Prices trends of Diesel and petrol (YR/lt) (Feb. – Oct.,2015)**



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