

YEMEN | JOINT MARKET MONITORING INITIATIVE (JMMI)

July 2024

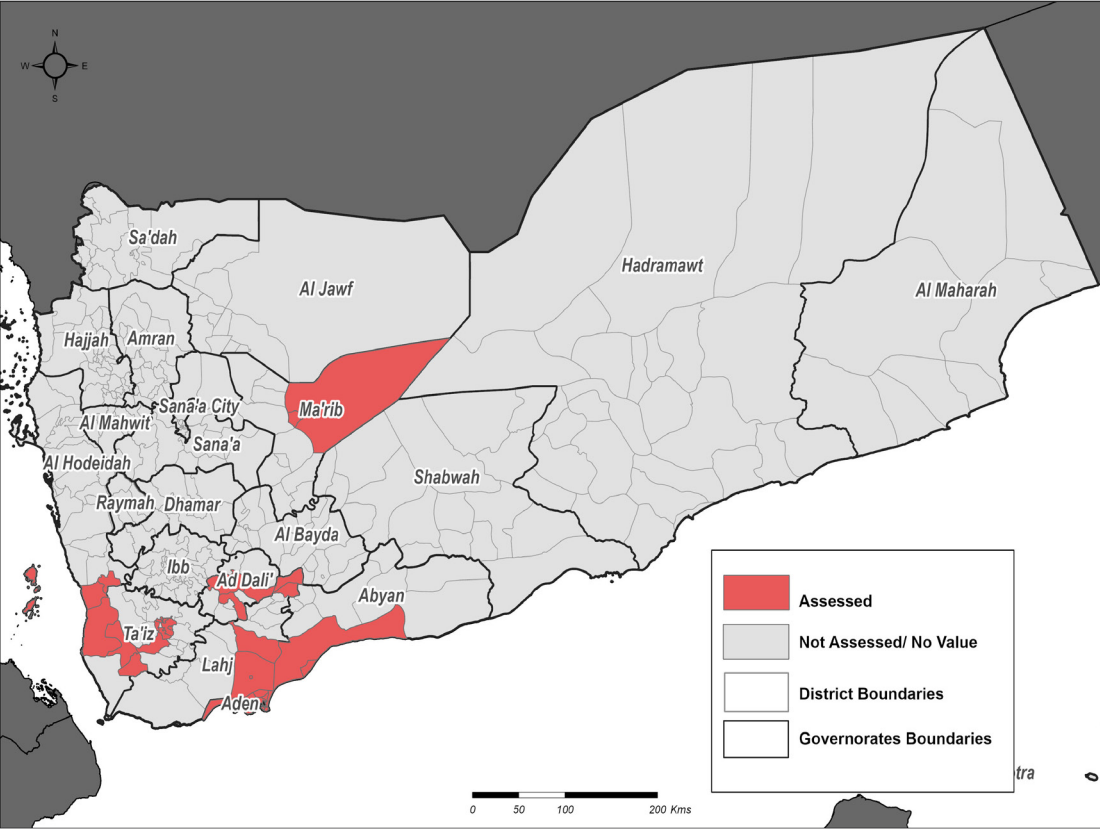
INTRODUCTION

The Yemen Joint Market Monitoring Initiative (JMMI) is led by REACH in collaboration with the **Water, Sanitation, and Hygiene (WASH) Cluster** and the **Cash and Market Working Group (CMWG)** since 2018. The objective of the JMMI is to support humanitarian actors with the harmonization of market monitoring and to produce information products for evidence based **Cash and Voucher Assistance (CVA)** and **market-based programming (MBP)**. The JMMI tracks the price and availability

of all components of the WASH and food Minimum Expenditure Basket (MEB), as well as other food and non-food items. In addition, **the JMMI monitors the functionality of the markets** by assessing the supply chain and vendors' perceptions of the market and their businesses.

This JMMI Situation Overview presents the findings of the data collected in 89 markets of areas controlled by the Government of Yemen (GoY), between 7 - 14 July 2024.

ASSESSED DISTRICTS



KEY FINDINGS

- In the markets assessed in the government of Yemen-controlled areas (GoY)¹, the price of the food component of the MEB increased by 1% compared to the previous month**, with a median of 139,417 YER. The median price per MEB food item remained stable, except for dry beans and sugar which have both increased by 7% due to the **decline in demand on the beans and volatility of exchange rate**, according to vendor Key Informants (KIs). However, prices of some **food items outside of the MEB**, such as **potatoes and onions** increased substantially with 25% and 50% respectively.
- Compared to the previous month, the median cost of the WASH component of the MEB in GoY-controlled areas has increased by 3%**, with a median price of 35,077 YER. This change was probably driven by the **volatile exchange rate** and by the **increase in the median price of sanitary napkins (+2%)** this month. The median price of other items remained stable.
- In GoY-controlled areas, the price of cooking gas has decreased by 5%** compared to the previous month. According to vendor KIs, the price dynamics vary depending on the supply source.

KEY INDICATORS

Exchange Rates

1,870 YER/USD GoY Parallel market ▲+6%	530 YER/USD Official market (Central Bank of Yemen, Aden)
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Key Changes In MEB

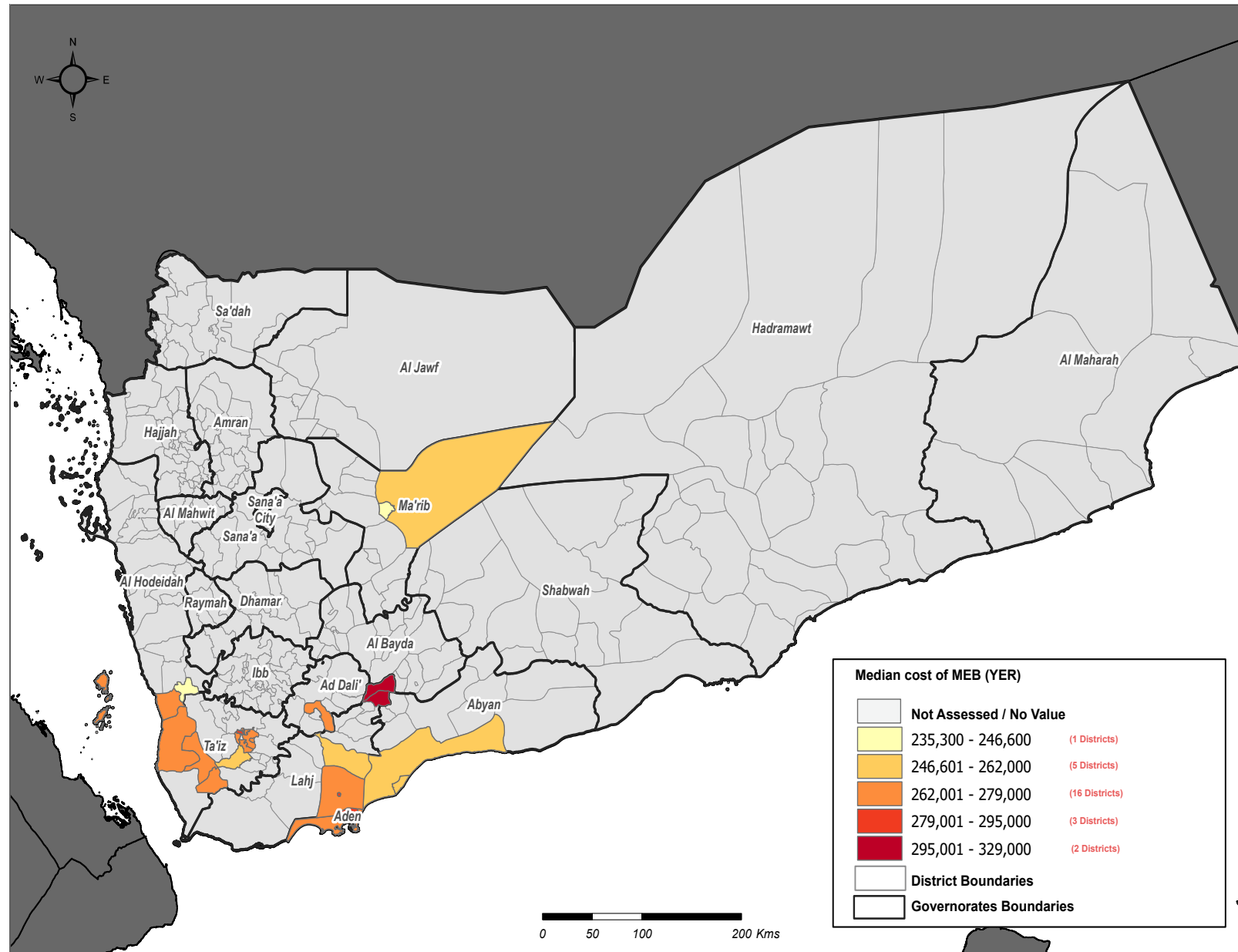
Median cost of total MEB June 2024 - July 2024			
GOY	268,033	▲+1%	
Food MEB		▲+1%	
WASH MEB		▲+3%	
Cooking gas		▼-5%	
139,417 YER	35,077 YER	10,600 YER	

Market Shortages

Fuel items: cooking gas, petrol, diesel
Food items: wheat flour and dry kidney beans

12	Participating agencies
7	Assessed governorates
31	Assessed districts
647	Key informant interviews (KIs)
89	Markets assessed in GoY-controlled areas

The Median Cost of The Assessed Total MEB*



* This map visualises the cost of the items in the total MEB in Yemeni Rial (YER), calculated for districts with available price data in this month's JMMI round. Darker colours indicate a relatively higher cost while lighter colours indicate a lower cost. See table for the components of the total MEB

Minimum Expenditure Basket (MEB) Components

The Minimum Expenditure Basket (MEB) represents the minimum culturally adjusted group of items required to support a seven-person Yemeni household for one month. The MEB is composed of essential commodities and services. The list of commodities and services is provided by **FSAC, Shelter and Health clusters, IOM, KAP Survey and the CMWG**. Since September 2022², **REACH** calculates the cost of the MEB following the updated CMWG guidance.

Food Items

Wheat flour	75 kg
Kidney beans	10 kg ³
Vegetable oil	8 L
Sugar	2.5 kg
Iodised salt	1 kg

WASH Items

Soap	1050 g
Laundry powder	2000 g
Sanitary napkins	50 pieces
Water ²	3150 L
Water treatment tablets	Pack of 50 tablets

Non-food items

Cooking fuel	1 cylinder
Rent subsidy	lump sum
Shelter maintenance	lump sum

Health items

Medication	lump sum
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Services

Communication	lump sum
Transportation	lump sum

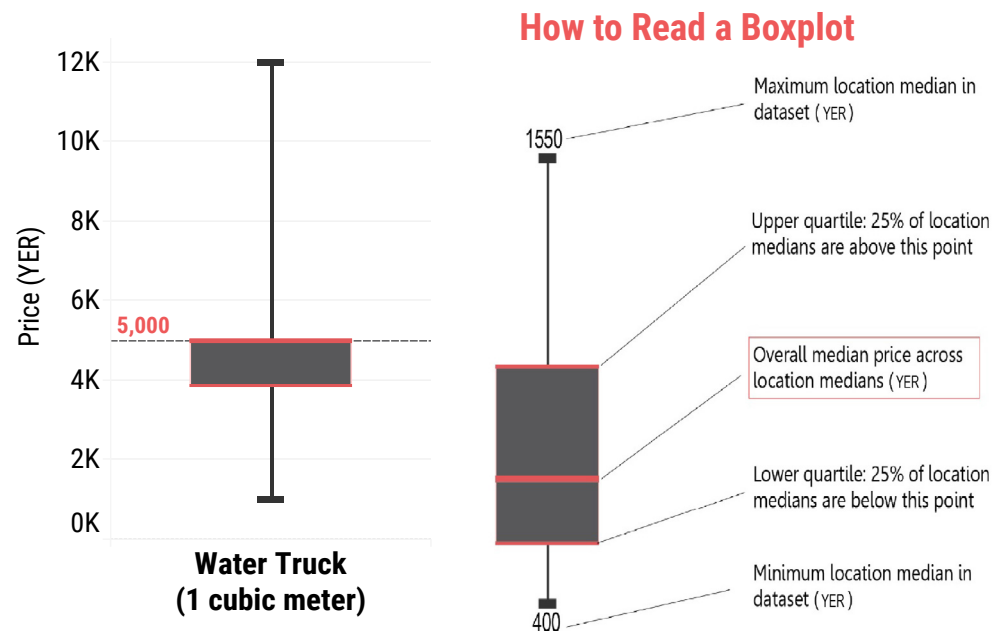
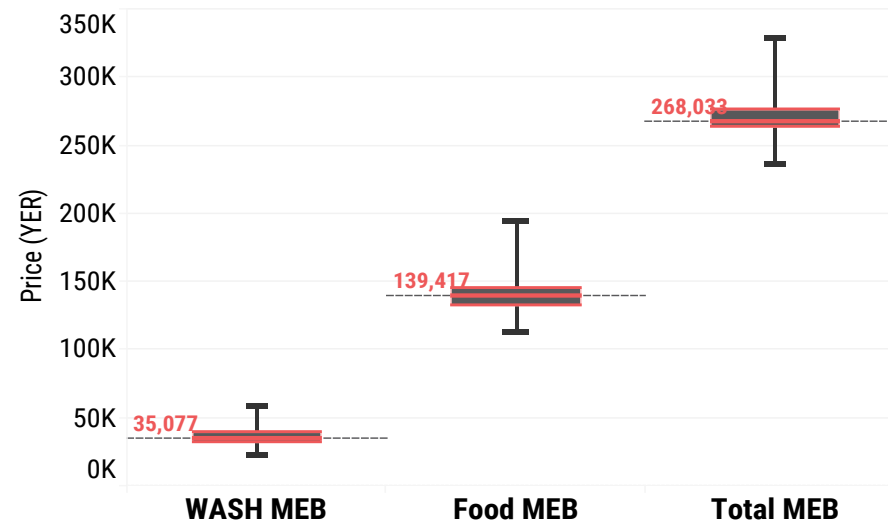
Median Cost of Total MEB

GoY 268,033 YER ▲ +1%

District Median Prices of MEB Components, in YER

Location	Median Price of Total MEB in YER	Change since April 2024
Abyan		
Khanfir	262,183	▲3.68%
Zingibar	256,099	▼-0.15%
Aden		
Al Buraiqeh	269,649	▲1.6%
Al Mansura	279,033	▲5.77%
Al Mualla	267,299	▼-0.11%
Ash Shaikh Outhman	264,424	▼-0.08%
Craiter	267,299	▼-0.11%
Dar Sad	285,599	▲6.45%
Khur Maksar	266,512	▲0.78%
Al Dhale'e		
Ad Dhalee	274,018	▲6.46%
Al Hudaydah		
Al Khawkhah	266,949	▲0.21%
Hays	235,305	▼-0.88%
Lahj		
Al Had	329,190	▲20.8%
Al Hawtah	295,666	▲9.67%
Al Milah	260,387	▲2.76%
Tuban	265,799	▼-1.7%
Yafaa	329,092	▲20.76%
Marib		
Marib	252,457	▲4.59%
Marib City	246,603	▲3.88%
Taizz		
Al Maafer	247997	▼-3.81%
Al Mawasit	271425	▲2.61%
Al Misrakh	257804	▲2.03%
Al Mudhaffar	263777	▲1.02%
Al Mukha	268766	▼-1.2%
Al Qahirah	261354	▲3.58%
Al Waziyah	248921	▼-5.68%
Ash Shamayatayn	271773	▲9.19%
Mawza	247346	▼-5.44%
Total MEB national level	268,033	▼-0.62%

National Median Prices of MEB Components, in YER*



Median Prices of Assessed Items, in YER

Assessed items	Median Prices in GoY	Change since June 2024
Total MEB (canned beans)	268,033	+1%
MEB - WASH	35,077	+3%
Soap	500	0%
Laundry powder	400	0%
Sanitary napkins	1,450	+2%
Water trucking	5,000	0%
Non- MEB WASH		
Bottled water	250	-17%
Treated water	225	-5%
Bleach	2,105	+5%
MEB - Food (canned beans)	139,417	+1%
MEB - Food (dry beans)	130,350	0%
Wheat flour	1,000	0%
Canned kidney beans	1,000	0%
Dry kidney beans	3,000	+7%
Vegetable oil	2,700	+2%
Sugar	1,600	+7%
Salt	200	0%
Non-MEB food		
Rice	2,100	-9%
Lentils	2,600	+4%
Potatoes	1,000	+25%
Onions	1,500	+50%
Fuel		
Cooking gas	10,600	-5%
Petrol	1,375	+2%
Diesel	1,440	+3%

* The boxplots indicate to the median price of each MEB component at the national level.

Food MEB Findings

- According to vendor KIs, the prices of the food items overall (including non MEB) are unstable due to exchange rate fluctuations in GoY areas and the liquidity crisis in the whole of Yemen.
- Of the governorates assessed, the highest median price of the food component of the MEB (with canned beans) in the GoY-controlled area was Lahj governorate (169,267 YER).
- For items included in the MEB, the highest median prices were found at dry kidney beans and sugar which both have increased by +7%.
- For the items not included in the MEB, increases were noticed in the median prices of potatoes (25%) and onions (50%) compared to the previous month. According to KIs, these price changes might have been influenced by variations in the type and quality of surveyed items.

Median Cost of the Food component of the MEB and % change compared to June 2024

GoY 139,417 YER ▲ +1%

Availability of Monitored Food Items

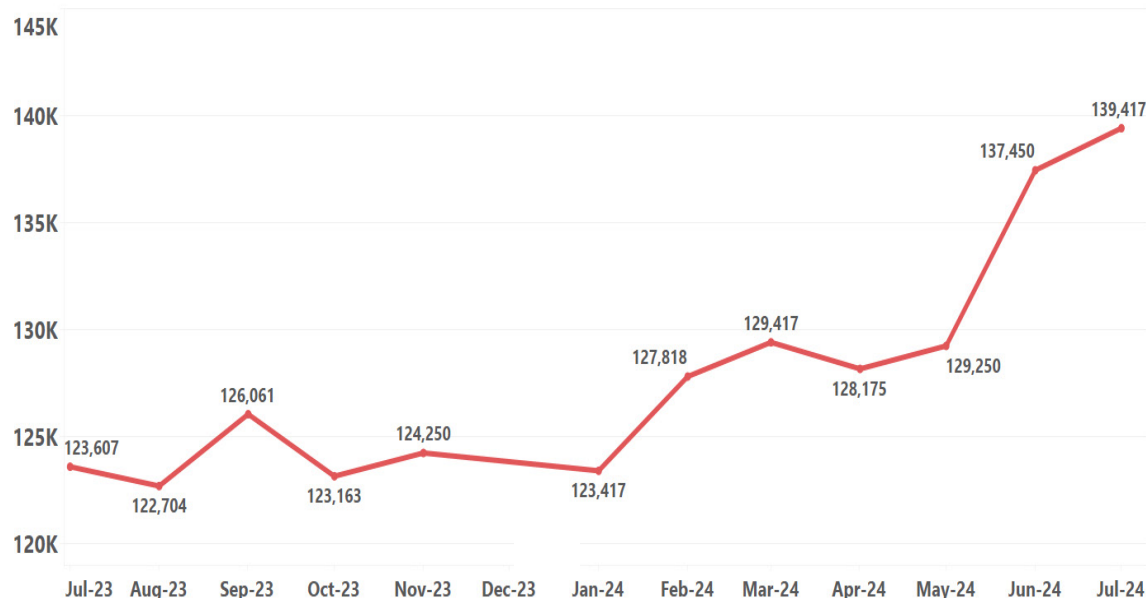
- 11% (17) of food vendor KIs reported being unable to meet a 50% increase in consumer demand for food items.
- 3% (4) of food vendor KIs reported a shortage of food items in the last 2 weeks prior to data collection. Most commonly reported item were:
 - Dry kidney beans (4 KIs)
 - Wheat flour (3 KIs)

Constraints Reported by Food Vendor (156)

Around 49% of the interviewed food vendor reportedly face constraints in keeping their business operational and well-stocked. During the previous month, this figure stood at 43%. In July 2024, most commonly reported constraints were⁵:

	1st choice	2nd choice	3rd choice
Price inflation	88%	4%	7%
High fuel prices	11%	12%	8%
Movement restrictions	1%	9%	4%
Decline of consumer demand	0%	13%	11%
Liquidity shortage	0%	9%	13%
Regulations from authorities	0%	8%	5%
Fuel shortage	0%	7%	1%
Electricity cuts	0%	5%	0%
Insecurity and instability	0%	3%	3%
Difficulty finding supplies	0%	3%	1%
Damage on the road	0%	3%	12%

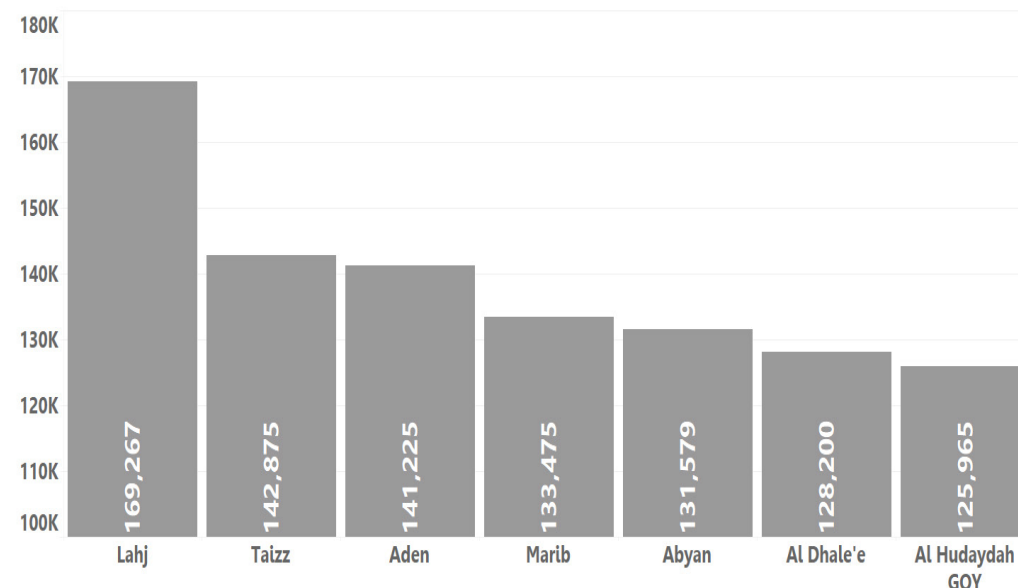
Median Cost of The Food MEB Component in GoY, in YER*



■ GOY

*Due to capacity constraints, data collection in December 2023 was conducted in only 6 districts. As a result of this no situation overview was produced and the December 2023 data is excluded from the graph.

Median Cost of The Food MEB Component Per Assessed Governorate, in YER



WASH MEB Findings

- There were **two WASH items** that were **difficult to find** among the surveyed vendors: **sanitary napkins and treated water**. This is due to low demand from the community.
- According to vendor KIs, the **instable exchange rate** was a driver to the price change of the overall WASH items.
- The **governorate with the highest WASH MEB cost** in GOY controlled areas was in **Al Dhale'e** governorate at **52,438 YER**.
- KIs mentioned that there are **factors influencing the pricing of water trucking** service, which are: the condition of the roads and consumer demand.

Median Cost of the WASH component of the MEB and % change compared to June 2024

GoY 35,077 YER ▲ +3%

Availability of Monitored WASH Items

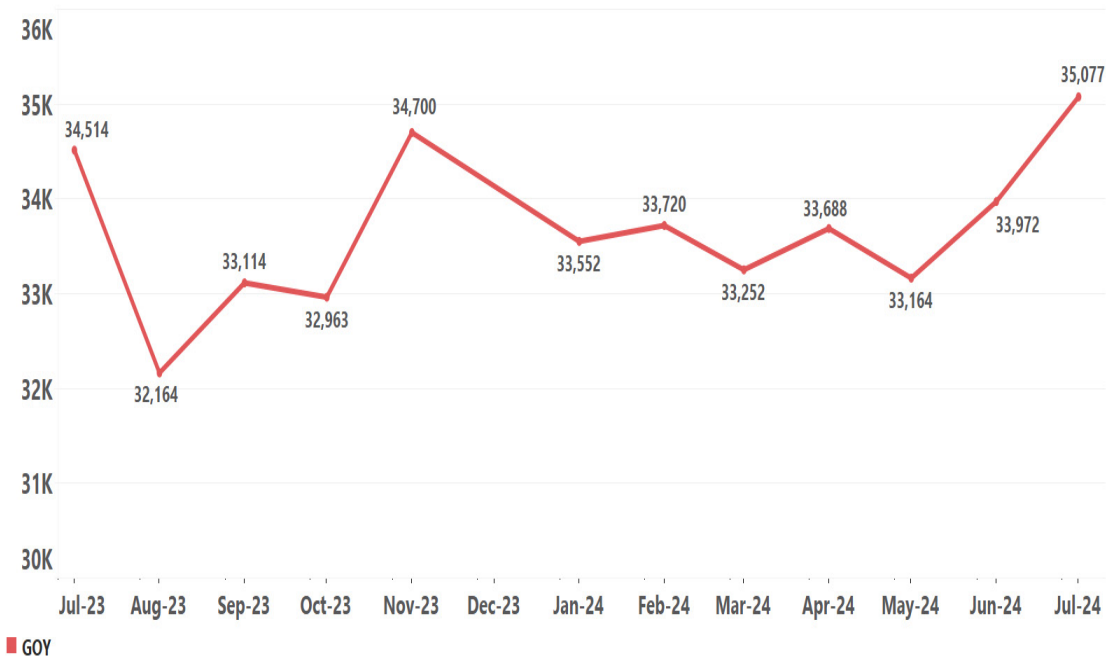
- 10% (15) of WASH vendor KIs** reported being unable to meet a 50% increase in consumer demand for WASH items.

Constraints Reported by WASH vendor (155)

Around **41%** of the interviewed WASH vendor reportedly face constraints in keeping their business operational and well-stocked. **During the previous month**, this **proportion was 38%**. In July 2024, most commonly reported constraints were⁶:

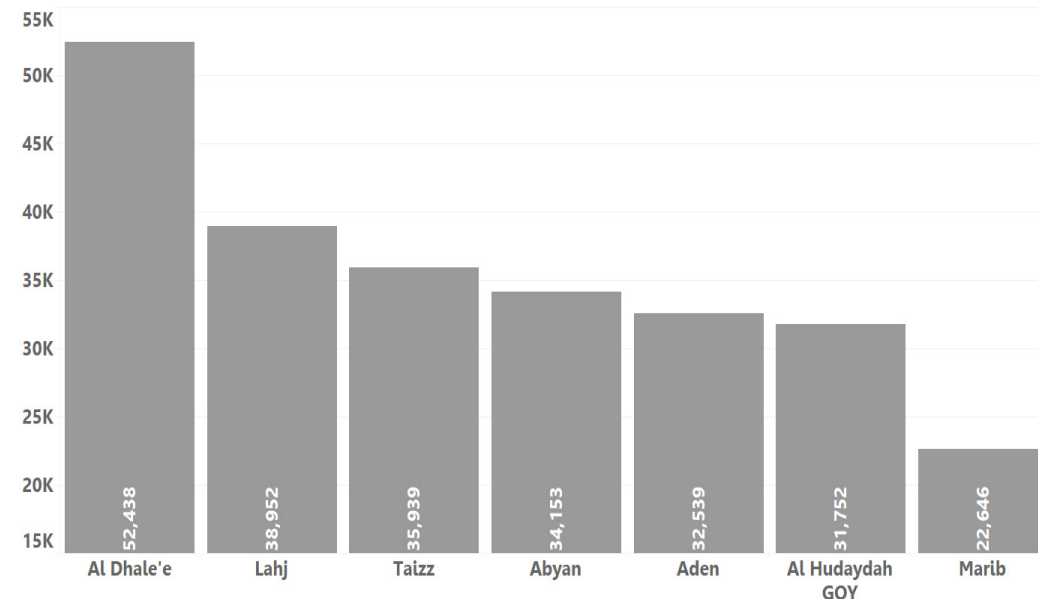
	1st choice	2nd choice	3rd choice
Price inflation	95%	2%	0%
Damage on the road	3%	5%	11%
High fuel prices	2%	9%	6%
Decline of consumer demand	0%	17%	5%
Movement restrictions	0%	11%	3%
Regulations from authorities	0%	9%	5%
Liquidity shortage	0%	8%	9%
Difficulty finding supplies	0%	3%	2%
Electricity outage	0%	2%	5%
Insecurity and instability	0%	2%	3%

Median Cost of the WASH MEB Component in GoY, in YER*



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Median Cost of The WASH MEB Component Per Assessed Governorate, in YER



Water Trucking (1 m³)*

GoY 5,000 0%

Chlorination rate	Percentage
Not chlorinated	68%
Chlorinated	30%
Do not know	2%

Water source	Percentage
Pumping Station or Borehole	72%
Treatment Station	15%
Water Spring	12%

Note on Monitored Trucked Water

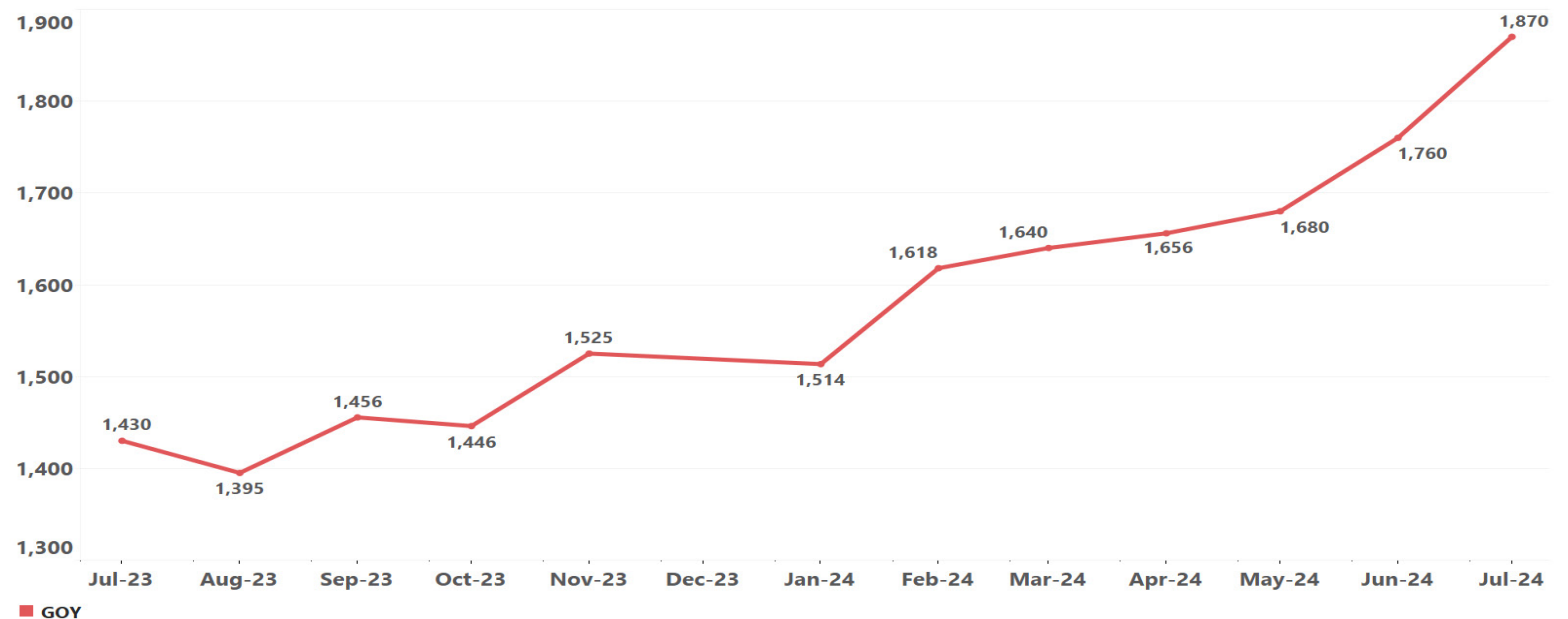
• No price change has been observed on median of trucked water in GOY controlled areas since June 2023. Low demand and reliance on wells were the main drivers for the price stability, according to vendor KIs.

Constraints Reported by Water Trucking Vendor (104)

50% of the interviewed water trucking vendor reportedly faced constraints in keeping their business operational and well-stocked. **During the previous month, this proportion was 53%.** Most commonly reported constraints were⁷:

	1st choice	2nd choice	3rd choice
Price inflation	38%	4%	10%
High fuel prices	38%	27%	13%
Fuel shortage	10%	8%	0%
Decline of consumer demand	4%	10%	8%
Movement restrictions	4%	4%	2%
Regulations from authorities	2%	6%	4%
Damage on the road	2%	21%	19%
Increase of consumer demand	2%	0%	0%
Electricity cuts	0%	2%	0%
Liquidity shortage	0%	2%	4%
Damage at the marketplace	0%	2%	4%

Trend in Exchange Rates in GoY controlled areas (YER/USD)*



Median Cost of Exchange Rate

GoY ▲ 1,870 YER /USD +6%

Notes on Monitored Exchange Rate

- The **governorate** with the **highest** recorded exchange rate was **Aden** governorate (1,882 YER/USD).
- **According to enumerators**, the exchange rate has a major effect on the price changes as vendor in **GoY-controlled areas** relate the YER exchange rate to set prices of items or services.

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Findings of Monitored Fuel Items

- Out of the 124 KIIs conducted this month with fuel vendors, 23% took place at stations affiliated with YPC or YGC, 76% at commercial stations, and 1% on the informal market⁸.

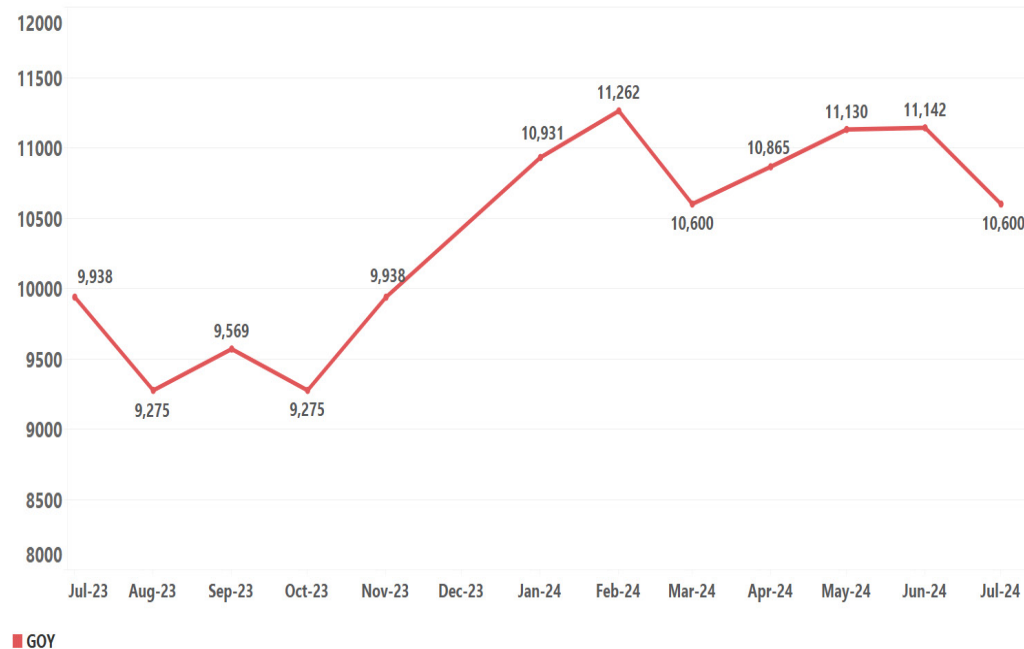
Median Cost of fuel and % change compared to June 2024

Petrol (1 L)	Diesel (1 L)	Cooking gas (1 cylinder)
1,375 YER	1,440 YER	10,600 YER
▲ +2%	▲ +3%	▼ -5%

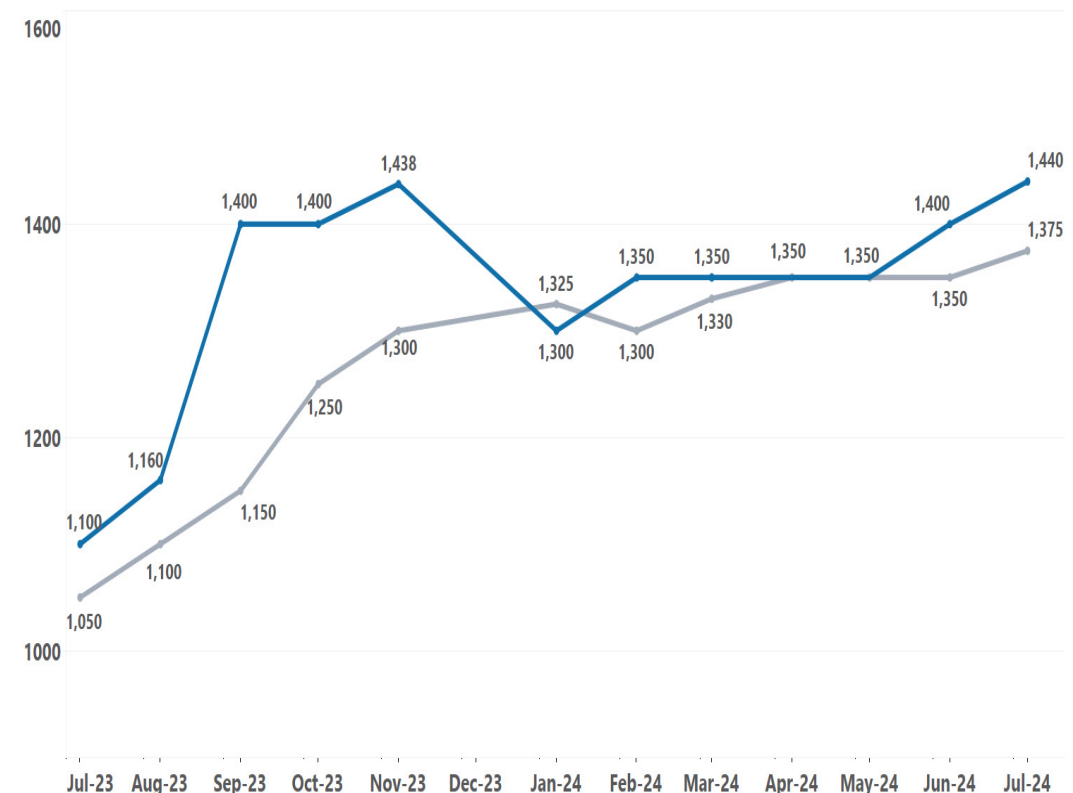
Median Price of Fuel Items in YER, Per Station Type (124)⁹

	Fuel item	YPC/YGC	Commercial	Informal economy
GoY	Petrol (1 L)	1,350	1,380	1,400
	Diesel (1 L)	1,415	1,450	1,450
	Cooking gas (1 cylinder)	9,938	10,600	11,262

Median Cost Trends for Cooking Gas in YER*



Median Cost Trends for Diesel and Petrol, in YER*



Availability of monitored items

- 44%** (55) of fuel vendor KIIs reported being **unable to meet a 50% increase** of consumer demand for fuel items.
- 8%** (10) of fuel vendor KIIs reported a **shortage** of fuel items in the last 2 weeks prior to data collection. Reported items were:
 - Diesel** (10 KIIs)
 - Petrol** (5 KIIs)

*Due to capacity constraints, data collection in December 2023 was conducted in only 6 districts. As a result of this no situation overview was produced and the December 2023 data is excluded from the graph.



WASH Cluster
Water Sanitation Hygiene

CMWG

YEMEN

CASH & MARKET WORKING GROUP

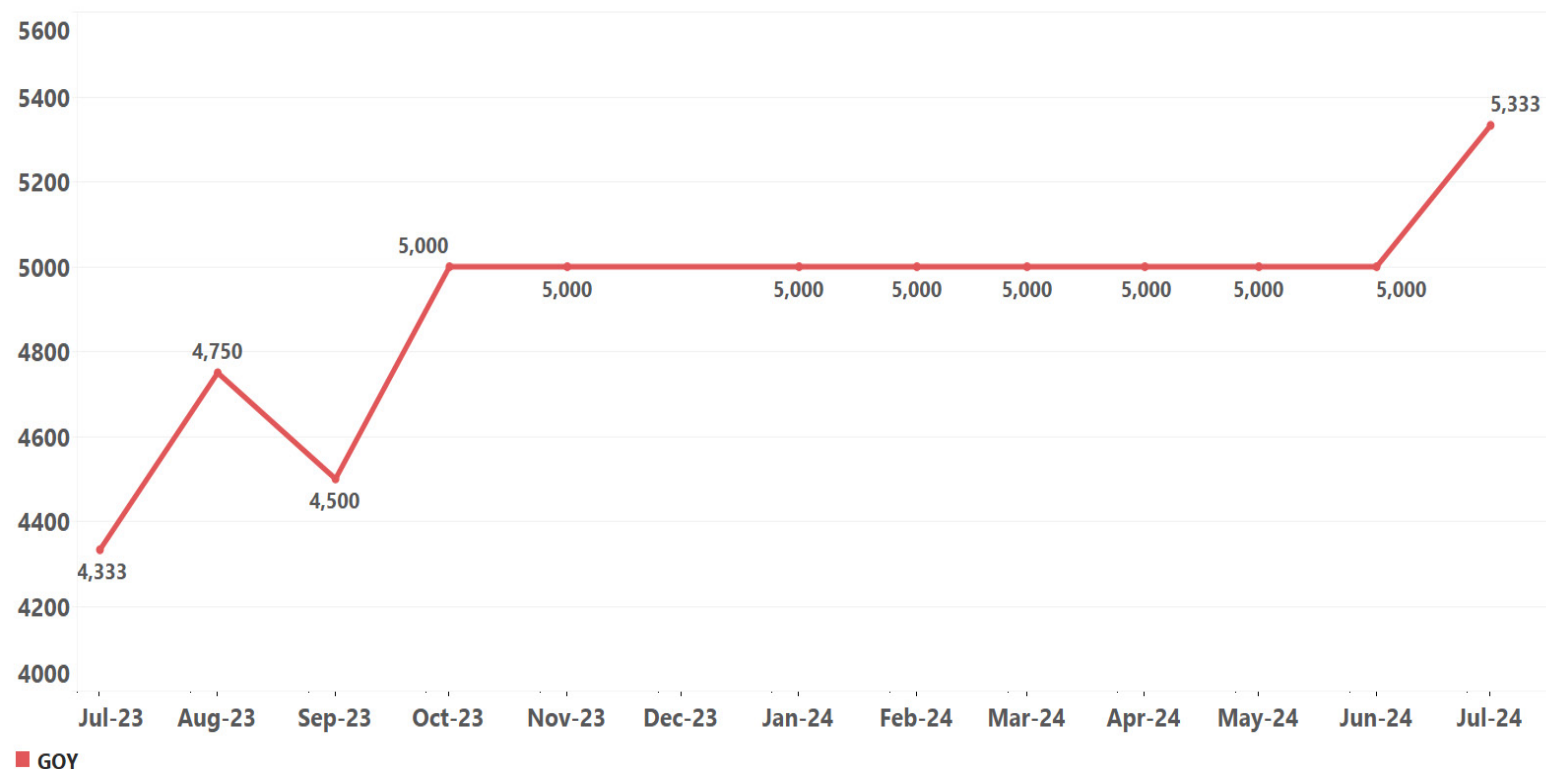
REACH Informing more effective humanitarian action

Minimum Daily Wage

Vendors were asked **to estimate the daily wage of casual labourers** in their community. These labourers usually perform basic jobs that do not require formal schooling, and are employed on a daily basis without a contract. Three out of four Yemeni households depend on daily casual labour as their main income source. **The JMMI aims to measure the typical wage of the lowest earning casual labourer** in the area. The **median minimum wage** estimated by KIs was **5,333 YER per day, referring to the national level**.

Comparing wages and the price of basic items provides **insight into the relative purchasing power** of these labourers. **This month, a casual labourer would need to work for 26 days** to afford the median price of the food component of the MEB¹⁴ in **GoY-controlled areas (139,417 YER)**, when earning the median wage (5,333 YER) reported by the KIs in this area.

Median Daily Wage Rate Across Yemen as Estimated by Vendor KIs, in YER*



*Due to capacity constraints, data collection in December 2023 was conducted in only 6 districts. As a result of this no situation overview was produced and the December 2023 data is excluded from the graph.

District Level Prices of Monitored Commodities

Governorate	District	MEB - WASH	MEB - Food (dry beans)	MEB - Food (canned beans)	MEB - Total (canned beans)	Petrol 1 L	Diesel 1 L	Cooking gas 1 cylinder	Water Trucking 1 m3	Exchange Rate (YER/1 USD)
Abyan	Khanfir	39,666	124,907	129,107	257,983	1,430	1,425	11,142	5,000	1,864
Abyan	Zingibar	28,639	128,050	134,050	250,099	1,430	1,500	10,202	2,000	1,866
Aden	Al Buraiqeh	35,539	134,300	140,700	263,249	1,400	1,425	11,778	5,000	1,875
Aden	Al Mansura	29,419	148,584	156,204	271,413	1,390	1,440	9,938	3,700	1,859
Aden	Al Mualla	32,539	130,350	141,350	256,299	1,350	1,300	10,600	5,000	1,882
Aden	Ash Shaikh Outhman	35,264	127,750	135,750	256,424	1,400	1,500	9,275	5,000	1,866
Aden	Attawahi	NA	130,100	141,100	NA	1,350	1,300	10,600	NA	1,882
Aden	Craiter	32,539	130,350	141,350	256,299	1,350	1,300	10,600	5,000	1,882
Aden	Dar Sad	58,089	122,500	134,100	273,999	1,400	1,525	9,805	12,000	1,882
Aden	Khur Maksar	31,752	130,350	141,350	255,512	1,400	1,500	9,938	4,750	1,882
Al Dhale'e	Ad Dhalee	52,438	121,570	128,170	267,418	1,400	1,525	10,600	10,000	1,880
Al Dhale'e	Ash Shuayb	NA	NA	128,200	NA	1,300	1,500	10,600	NA	1,870
Al Dhale'e	Qatabah	NA	NA	129,850	NA	1,400	1,500	10,600	NA	1,870
Al Hdaydah	Al Khawkhah	34,889	125,450	138,650	253,749	1,375	1,430	11,262	4,000	1,870
Al Hdaydah	Hays	28,615	104,080	113,280	226,105	1,375	1,425	11,262	2,167	1,870
Lahj	Al Had	40,863	176,117	194,917	310,390	1,450	1,450	17,225	7,333	1,850
Lahj	Al Hawtah	32,989	154,667	169,267	281,066	1,380	1,380	9,938	5,000	1,845
Lahj	Al Milah	38,952	124,525	128,025	256,887	1,400	1,500	9,938	6,000	1,868
Lahj	Tuban	35,489	132,900	136,900	261,799	1,380	1,500	9,938	5,000	1,865
Lahj	Yafaa	40,765	177,117	194,917	311,292	1,400	1,400	13,250	6,667	1,850
Marib	Marib	21,864	131,183	137,183	246,457	1,200	1,300	7,288	1,000	1,859
Marib	Marib City	23,427	122,266	129,766	239,103	400	175	7,288	1,334	1,870
Taizz	Al Maafer	33,339	116,300	130,900	243,049	1,350	1,400	11,262	4,000	1,830
Taizz	Al Misrakh	32,314	151,200	149,200	274,924	1,400	1,450	11,262	3,500	1,850
Taizz	Al Mudhaffar	40,589	159,450	161,650	293,449	1,350	1,450	11,262	5,000	1,875
Taizz	Al Mukha	35,939	126,217	139,417	255,566	1,375	1,430	11,262	4,500	1,870
Taizz	Al Qahirah	37,539	144,875	142,875	273,824	1,300	1,450	11,262	5,000	1,878
Taizz	Al Waziiyah	39,614	125,450	138,650	258,474	1,375	1,430	11,925	5,500	1,870
Taizz	Mawza	34,364	126,217	139,417	253,991	1,375	1,430	11,262	4,000	1,875
Taizz	Sabir Al Mawadim	29,109	149,975	148,975	271,494	1,350	1,450	11,262	2,800	1,850
Taizz	Salh	37,039	149,925	146,925	277,374	1,300	1,450	11,262	5,000	1,872

Methodology

Data for the JMMI is collected at the beginning of each month through structured surveys with Key Informants (KIs) in urban and rural marketplaces. KIs are purposefully selected and enumerators are instructed to visit at least three different vendors per monitored item and obtain the cheapest price per item in each monitored location. The interviews are conducted by partner organisations using a harmonised data collection tool. Following data collection, REACH compiles and cleans the data through detailed follow-up with partners.

To be assessed by the JMMI, marketplaces must be either a single permanent market, or multiple commercial areas located in close proximity to one another. When possible, marketplaces are selected where there is at least one wholesaler operating in the market. Participating organisations are trained on the JMMI methodology and survey by REACH.

REACH presents district level median prices using data from the KIs within that district. Governorate, GoY-controlled areas and national level data (including MEBs) are aggregated from the district medians of the respective assessed districts. In disputed districts, the median of GoY controlled areas lumpsum is used to calculate the total MEB in that district (=64665). The market functionality indicators are analysed using frequency percentages.

Findings are indicative of the assessed locations and time frame in which the data was collected. Districts represented in the JMMI are subject to change depending on the capacity and availability of the data collection partners. Therefore, the markets and the districts included in the JMMI will vary on a monthly basis, which ultimately influences longitudinal analysis.

MEB Calculation

- Before September 2022, the 2020 CMWG SMEB Guidance Note was applied, where the MEB was referred to as the 'survival minimum expenditure basket' (SMEB). Since then, REACH has calculated the MEB based on the updated 2022 CMWG MEB guidance².
- The cost of the monthly total MEB for a household of 7 is calculated by adding the cost of the WASH and food MEB components, the cost of 1 cylinder of cooking gas, and the lump sum values for shelter, health and services¹⁰.
- The WASH component is calculated using JMMI data plus a lump sum amount for water treatment tablets.
- The cost of cooking gas is added to the total MEB reflecting the updates in the last CMWG MEB guidance note from September 2022. Starting in June 2023, the cost of cooking gas cylinder has been calculated using medians per district as all other items from the current round instead of calculating the median from September 2022 until the current round.
- Following data collection, REACH compiles and cleans all partner data and checks for entry errors and outliers.
- Percentage changes of prices are calculated by comparing the two medians of the relevant time series and aggregation level. More details on the methodology can be found in the [JMMI terms of reference \(ToR\)](#).

Challenges and Limitations

- Due to issues of access, security and partner capacity, the districts included in the JMMI vary on a monthly basis. Consequentially, price variations between months may be attributed to changes in monthly coverage and this also means there is a limited number of districts for which trends can be consistently assessed over time.
- While enumerators are instructed to collect at least three prices per monitored item, this is not always possible due to less available vendors, items and markets in assessed districts.
- MEB components are dependent on the MEB guidance from the CMWG and the Food Security and Agriculture Cluster (FSAC). In consequence of a new CMWG MEB guidance note, part of the change in total MEB and WASH MEB between August and September 2022 is due to a change in MEB components and lump sum values.
- Findings are indicative for the locations assessed and not geographically representative for the whole of Yemen.
- It is recommended to refer to the [Interactive JMMI Dashboard](#) for longitudinal trends and historic data, as adjustments to the data or methodological improvements are updated there and not always in the previous situation overviews.
- The market monitoring process has been coordinated remotely by REACH, which presents some challenges in terms of coordination and follow-up with partners.
- Interviewed vendors do not provide price quotations for all monitored items due to the different nature of the monitored items and difference in inventories.

JMMI Outputs

Situation Overviews

[January 2024](#)

[February 2024](#)

[March 2024](#)

[April 2024](#)

[May 2024](#)

Datasets

[January 2024](#)

[February 2024](#)

[March 2024](#)

[April 2024](#)

[May 2024](#)

[June 2024](#)

[July 2024](#)

Presentations

[October 2023 - January 2024](#)

For our previous months, the situation overview and datasets can be found on the [IMPACT official website](#).

JMMI Situation overviews & datasets can be accessed through the

[Interactive Dashboard](#)

Endnotes

1. GOY refers to areas under nominal control of the Internationally Recognized Government, including the Southern Transitional Council (STC).
2. CMWG. 2022. [Yemen Minimum Expenditure Basket: Operational Guidance Note](#). Lump sum values in YER are in GoY: 53,500 (shelter), 20,410 (health), 2,300 (transport), 7,935 (communication), 539 (water treatment tablets). Part of the change in the price of the total MEB between August and September 2022 is due to the change in MEB components.
3. Unless indicated otherwise, REACH utilizes the price of canned beans.
4. REACH utilizes the price of trucked water.
- 5, 6 & 7. Not all vendor facing constraints reported up to three constraints.
8. Based on the contextual feedback from vendor and data collection partners. As well as, to maintain the monthly monitoring of fuel, the enumerators were instructed to visit informal markets in case the closure of stations affiliated with the Yemen Petroleum Company (YPC) during the period of data collection.
9. Enumerators are instructed to only visit the informal market if there is no other fuel station available.
10. The food MEB serves the basic food needs of a household of 7 people for one month.

About the CMWG

The Yemen Cash and Markets Working Group (CMWG), established in 2014, is an essential coordination platform to support CVA actors to facilitate their programs and advocate for strategic objectives. . Currently, the CMWG is a sub-working group under the Intercluster Coordination Mechanism (ICCM) chaired by the United Nations Office for Coordination of Humanitarian Affairs (UNOCHA) and the Cash Consortium Yemen (CCY).

About REACH

REACH facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT).

For more information about REACH Yemen, you can contact us and sign up to our REACH Yemen mailing list under impact.yemen@impact-initiatives.org

For more information about IMPACT, please visit our [website](#), an sign up to our IMPACT quarterly newsletter or contact us directly at: geneva@reach-initiative.org and follow us on Twitter: [@REACH_info](https://twitter.com/REACH_info).

Participating agencies

