



## INTRODUCTION

The Yemen Joint Market Monitoring Initiative (JMMI) was launched by REACH in collaboration with the Water, Sanitation and Hygiene (WASH) Cluster and Cash and Market Working Group (CMWG) to support humanitarian actors with the objective of harmonizing price monitoring among all cash actors in Yemen. The JMMI incorporates information on market systems including price levels and supply chains. The basket of goods to be assessed comprises eight non-food items (NFIs), including fuel, water and hygiene products, reflecting the programmatic areas of the WASH Cluster.

## METHODOLOGY

Data collection for the third round of the JMMI took place between the 21st and 27th May 2018. Enumerators from 10 partner organisations collected data in 42 districts across 14 governorates, through Key Informant (KI) interviews. The number of districts assessed is lower than last month due to a decrease in activity during Ramadan. The sample of vendors was selected from markets of various sizes in both urban and rural areas. The data collected has been analysed in comparison with the price quotations recorded during the Multi-Agency Joint Cash Study in September 2017 and previous Weekly Price Monitoring Initiative, which began during the economic blockade of Yemen in November 2017. Findings of this analysis will be presented in the form of both this factsheet and a supplementary dataset, published on a monthly basis.

## KEY FINDINGS

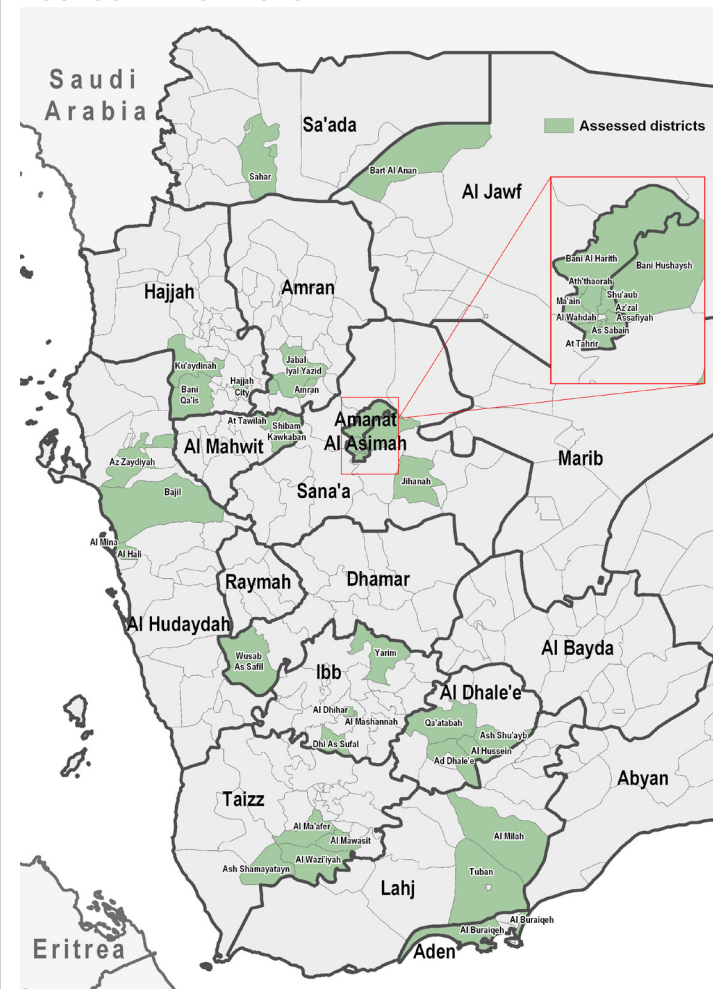
### PRICE MONITORING OVERVIEW

- Prices for petrol and diesel were higher among vendor KIs located in districts supplied by Al Hudaydah, than those supplied by Aden.
- In Sa'ada, vendor KIs provided the highest median price quotations and longest restocking times for the majority of products, across all governorates assessed.
- Across all districts assessed, median prices remained relatively stable between April and May, with the exception of treated water prices, for which recorded price levels were 20% higher than in the previous month.

### SUPPLY OVERVIEW

- Average restocking times were the highest in the governorates of Al Dhale'e and Sa'ada.
- Among all the products assessed, sanitary napkins had the longest restocking times.
- Vendor KIs in many areas reported that inconsistent supply levels of diesel created uncertainty in the supply chains for other commodities.
- Al Hudaydah continued to supply the majority of fuel vendor KIs in the north west of the country, however a higher proportion of fuel vendors were sourcing their products from Marib, in comparison to last month. Aden remained the primary supply point for the south west.

## ASSESSED DISTRICTS



## MONTHLY FIGURES

**10** Participating partners  
**42** Districts assessed  
**298** Vendors surveyed

## EXCHANGE RATES

1 US Dollar (USD) is equivalent to 250 Yemeni Riyal (YER) <i>Official</i> * <small>Source: XE.com</small>	1 US Dollar (USD) is equivalent to 480 Yemeni Riyal (YER) <i>Parallel market</i>
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## PARTNERS

Al Tadhamon Association  
CYF  
NFDHR  
NFHD  
ROC

SCI  
SDF  
YSD  
YFCA

## ASSESSED ITEMS

Petrol	Water trucking	Soap
Diesel	Treated water	Laundry powder
	Bottled water	Sanitary napkins

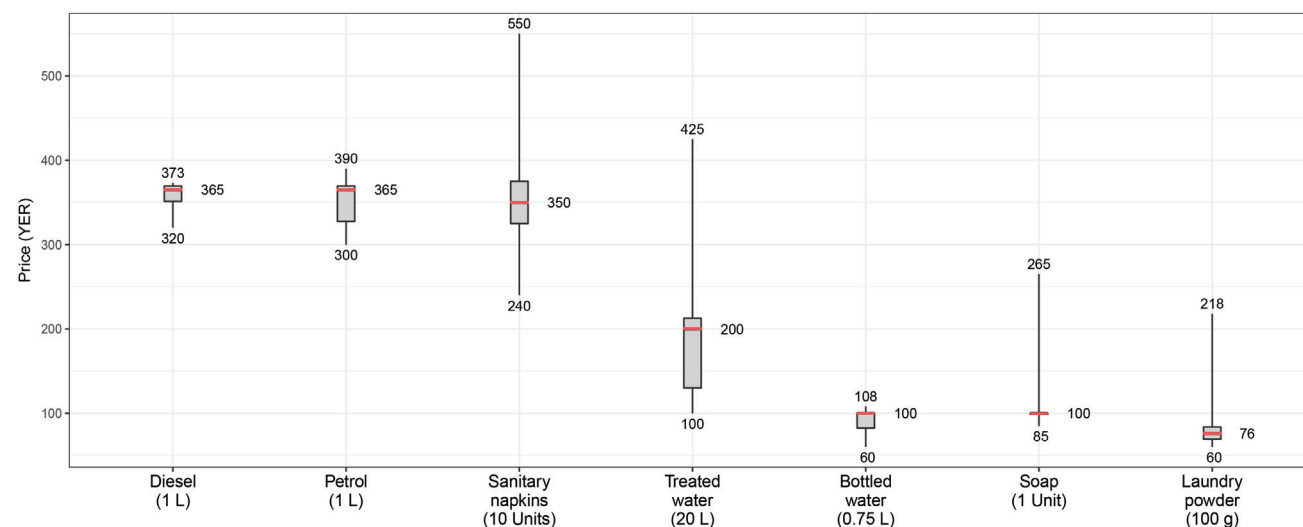
# PRICE MONITORING OVERVIEW FOR YEMEN

## MEDIAN PRICE PER GOVERNORATE (IN YER)

Governorate	Petrol (1L)	Diesel (1L)	Treated water (20L)	Bottled water (0.75L)	Soap (1 Unit)	Laundry powder (100g)	Sanitary napkins (10)	Water trucking (1m³)
Aden	315	320	225	100	100	100	325	1,000
Al Dhale'e	318	328	200	100	148	85	365	1,825
Al Hudaydah	374	373	160	98	98	68	308	1,875
Al Jawf	300	355	NA	100	265	121	NA	1,250
Al Mahwit	368	368	NA	80	100	80	328	2,000
Amanat Al Asimah	368	368	105	73	95	60	348	1,000
Amran	376	370	200	90	100	68	375	NA
Dhamar	365	365	100	80	90	75	240	2,000
Hajjah	365	365	250	100	100	73	350	1,600
Ibb	370	370	NA	60	100	60	350	1,500
Lahj	320	320	110	100	100	75	325	750
Sa'ada	390	373	425	100	157	218	550	800
Sana'a	360	360	225	108	85	77	380	1,250
Taizz	350	350	200	100	100	80	435	1,500

Note: red indicates the highest median price; green the lowest; and NA when data is not available

## DISTRIBUTION OF PRICES ACROSS GOVERNORATES

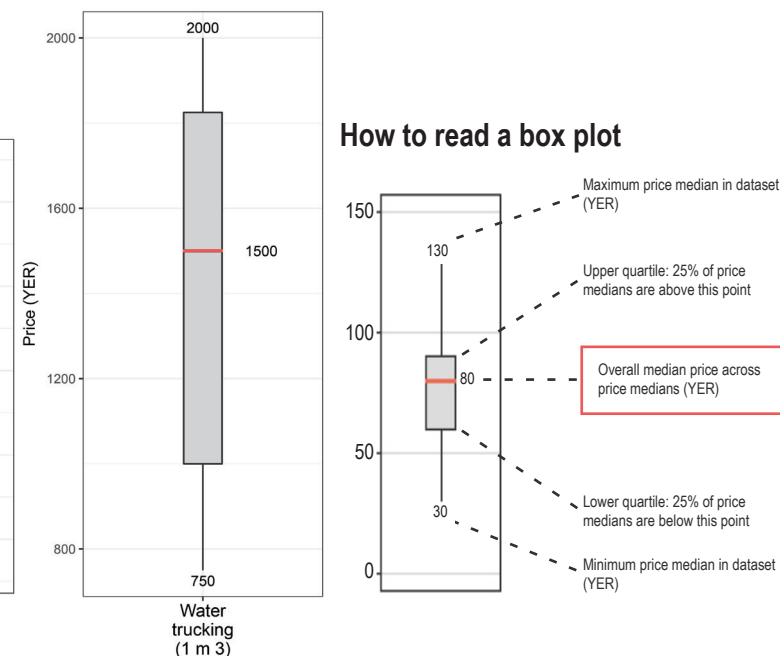


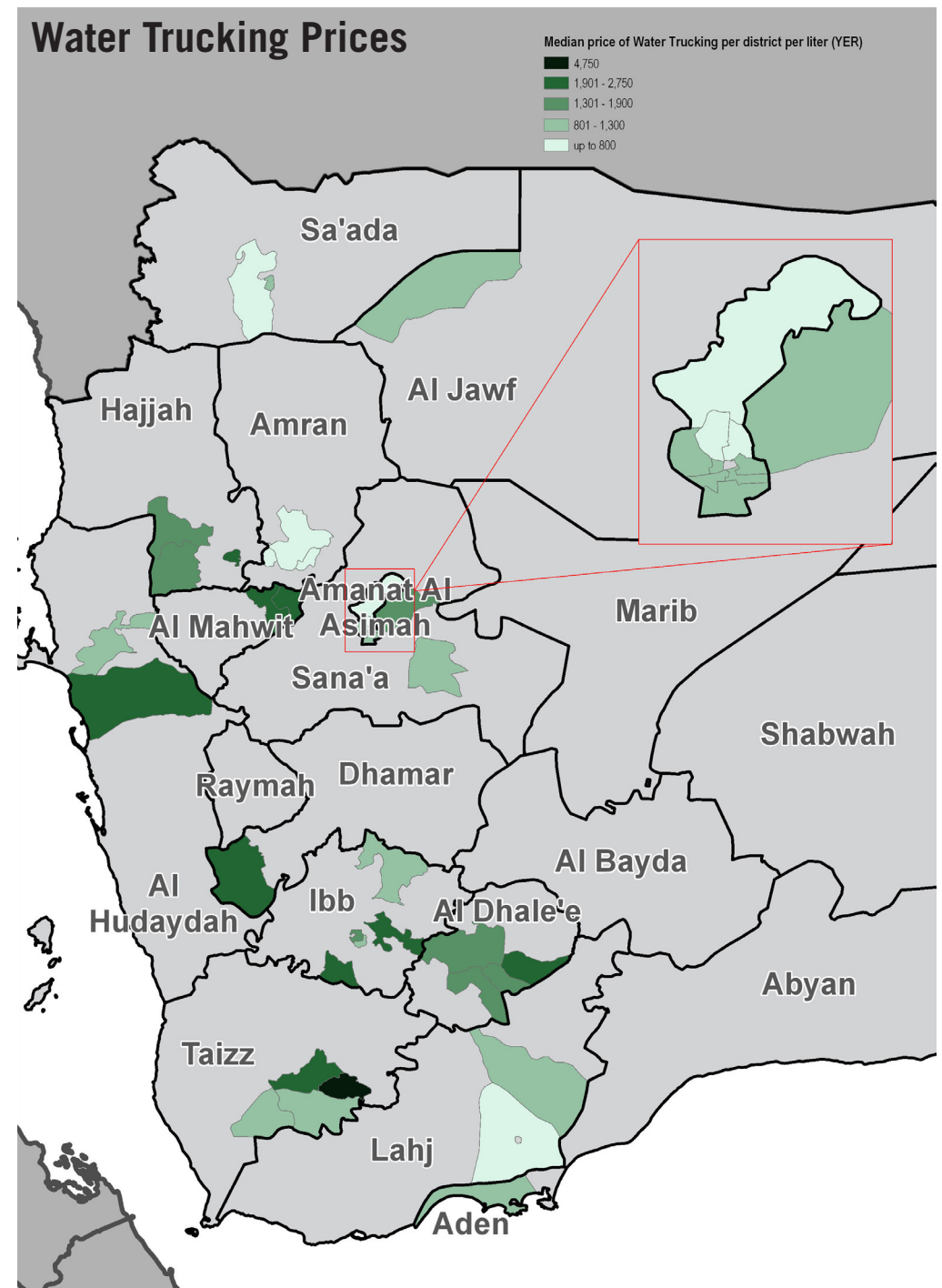
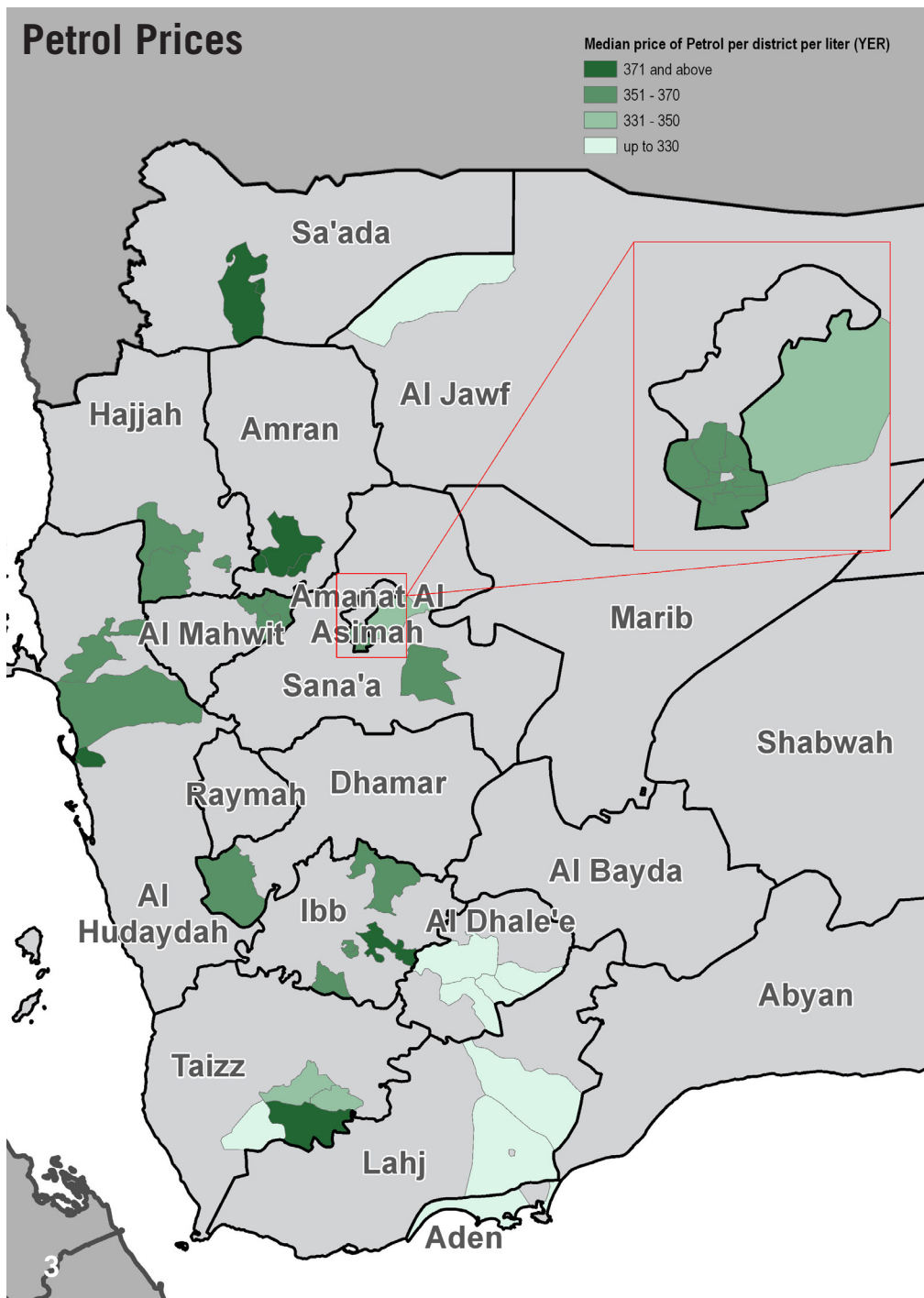
## MEDIAN PRICE PER ITEM SINCE SEPTEMBER 2017 (IN YER)\*

Item	September (baseline)	November	March	April	May	Changes (April-May) in %
Diesel	235	394	350	353	365	+3.40%
Petrol	275	349	360	358	365	+1.96%
Treated water	NA	175	200	162	200	+23.08%
Bottled water	70	100	100	100	100	0.00%
Soap	88	NA	100	113	100	-11.89%
Sanitary napkins	250	NA	363	360	350	-2.78%
Laundry powder	50	NA	85	79	76	-4.11%
Water trucking	825	1,700	1,292	1,250	1,500	+20.00%

\* Price variations will be partially influenced by fluctuations in the sample of districts assessed.

Data recorded in September 2017 for the Inter-Agency Joint Cash Study was used as the baseline for this analysis. The table above illustrates the rise in price levels observed during the economic blockade in November last year. While prices stabilised and then decreased over the past six months, price levels have not returned to the pre-blockade levels.





Note: the differences in the number of districts shown between the two maps for fuel and water prices is because the methodology-stipulated requirement for a minimum of three price quotations per district was not met in some areas.

## SUPPLY OVERVIEW FOR YEMEN

### AVERAGE RESTOCKING TIME REPORTED (DAYS)\*

Governorate	Diesel	Petrol	Bottled water	Treated water	Soap	Sanitary napkins	Laundry powder
Aden	4	3	1	1	1	1	1
Al Dhale'e	10	10	10	6	10	14	10
Al Hudaydah	1	1	1	1	1	1	1
Al Jawf	4	5	3	2	4	NA	3
Al Mahwit	3	3	2	1	2	1	2
Amanat Al Asimah	4	4	3	1	11	16	7
Amran	6	6	1	1	1	1	1
Dhamar	2	3	3	NA	NA	NA	NA
Hajjah	6	6	2	2	1	2	2
Ibb	6	5	3	2	8	10	6
Lahj	5	5	1	1	1	2	2
Sa'ada	13	13	7	1	7	19	7
Sana'a	5	5	6	2	3	3	3
Taizz	8	8	3	1	1	6	2

\* Variations between restocking time from the last factsheets are partially caused by changes to the research methodology.

### OVERVIEW FOR WATER TRUCKING

**58%** of water trucking vendor KIs stated that they charged additional delivery costs based upon the distance between the water source and delivery point. For every **10 km** travelled by the vendor KIs, there is an additional delivery cost of **5,000 YER** for an entire water truck.

**75%** of water trucking vendor KIs stated that they sell non-chlorinated water.

**99%** of water vendor KIs reported sourcing water from a pumping station or a borehole.

**96%** of water vendor KIs reported that they acquire their water from privately owned sources.

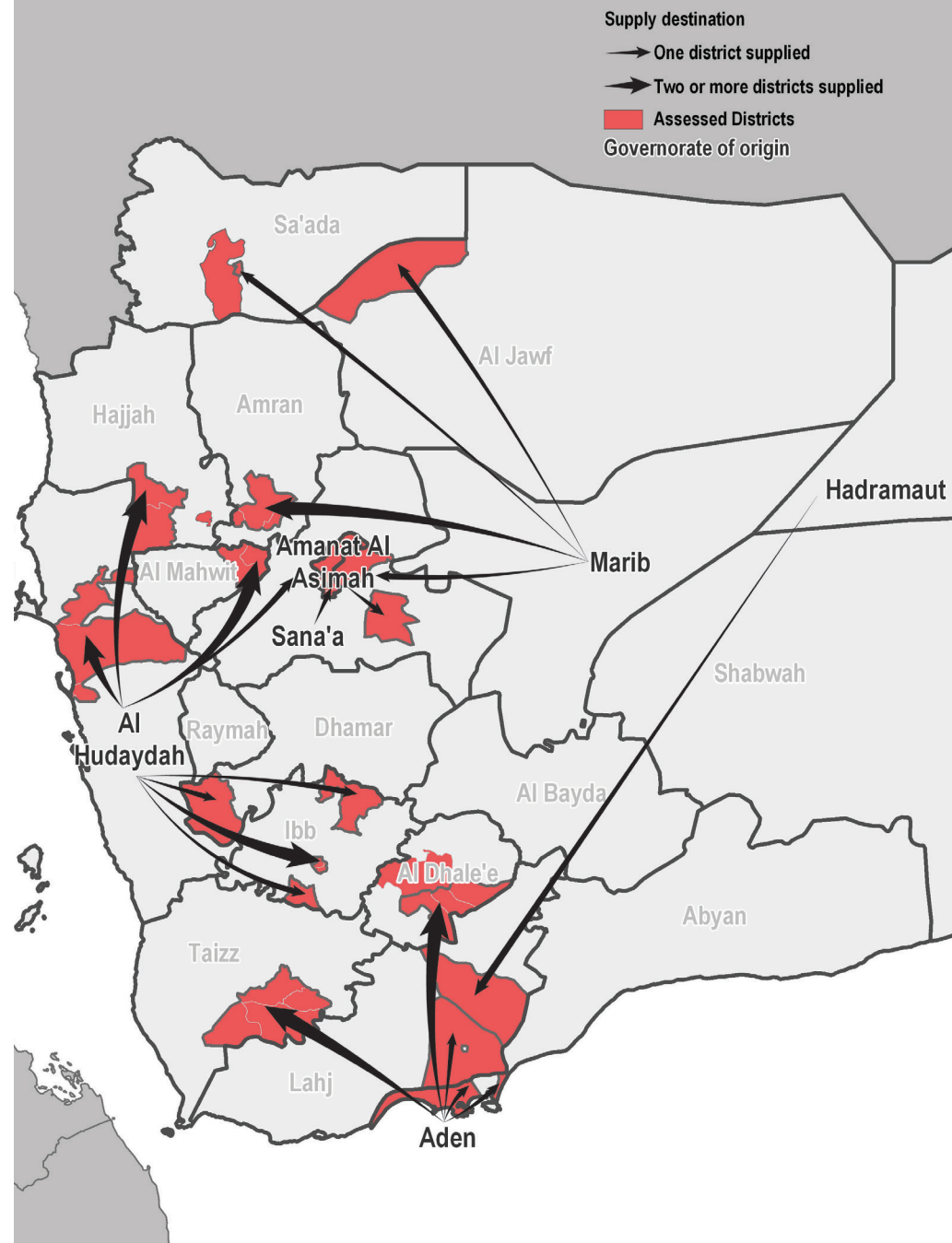
### CONSTRAINTS AND CHALLENGES

Vendor KIs were asked to state which challenges they were currently facing in buying and selling their products. The figures below represent the proportion of vendor KIs who stated that they were facing each challenge:

Price inflation	88%	
Transportation issues	41%	
Insecurity and instability	35%	
Liquidity shortage	30%	
Shortage of demand	29%	
Supply shortage	19%	
Government regulations	17%	
Other <sup>1</sup>	6%	

1. Other includes the availability of diesel which impacts the supply chains of other products.

### Petrol and Diesel main supply chains in assessed districts





## APPENDIX

### WHAT IS THE INTERSECTOR CASH AND MARKET WORKING GROUP?

With the emerging crisis in 2014, the humanitarian actors in Yemen started using cash and vouchers as a response tool to meet the immediate needs of the Yemeni population. The CMWG was established to provide a platform for discussion and setting standards/recommendations on cash and market-based responses (inclusive of cash and vouchers) for the people in need in Yemen. REACH and the CMWG have worked together on joint assessments since the Inter-Agency Joint Cash Study published in December 2017.<sup>1</sup> The Joint Market Monitoring Initiative was developed by CMWG, the WASH Cluster for Yemen and REACH Initiative in order to conduct harmonized price monitoring among all cash actors in Yemen.

### ADDITIONAL INFORMATION ON METHODOLOGY

To be included in the Yemen Market Monitoring Initiative, markets must be either a single permanent market, or a local community where multiple shops are located in close proximity to one another. Where possible, markets are selected when there is at least one wholesaler operating in the market and there are enough shops located in the market to provide a minimum of three price quotations per product.

Participating organisations train their enumerators on the Market Monitoring methodology and data collection tools using standard training materials developed by REACH. Each month, enumerators conduct key informant interviews with market

vendors to collect price quotations for each product from a minimum of two markets, from which a median price is identified.

One data collection tool is used within the JMMI framework by the enumerators. They have to record the location and type of market before obtaining price quotations. In addition to price levels, vendors are asked to state the current availability of the product in their local area, the location of their supplier, the number of days it takes to restock the product in their local area, and the constraints which they are facing in purchasing and retailing the item in question. There are additional questions for water trucking, to gauge the impact of delivery distance upon price level.

Following data collection, REACH compiles and cleans all partners' data, normalising prices and cross-checking outliers. The cleaned data is then analysed by commodity and by governorate. Prices are divided into quartiles and boxplots are created to help CMWG members understand the distribution of prices. To illustrate local variations in prices and availability, REACH uses the collected data to map the price of each type of item in each district. The cleaned data sets are available on the REACH Resource Centre and are distributed to all participating partners, as well as to interested clusters and the broader humanitarian community.

### LIMITATIONS

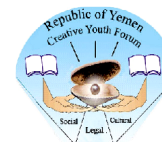
Due to issues of access and security across Yemen, the districts included in the JMMI will vary on a monthly basis, and as such there are a limited number of districts for which trends can be assessed over time. Governorate level data is composed of

the respective districts assessed in a given month, and so the findings are not representative of markets in all areas of the governorate. Finally, the market monitoring process has been coordinated remotely by REACH, which inherently presents further challenges in terms of enumerator training, consistent communication and verification of results which are harder to resolve from afar.

### CALCULATION OF MEDIAN CHEAPEST PRICE

The aggregated median price table is calculated by taking the median of the minimum-reported prices of a governorate's districts. In turn, the minimum-reported prices for each district are calculated from the average of the minimum reported prices of the constituent markets assessed.

### PARTICIPATING PARTNERS INCLUDE



Save the Children®



### ABOUT REACH

REACH is a joint initiative that 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. By doing so, REACH contributes to ensuring that communities affected by emergencies receive the support they need. All REACH activities are conducted in support to and within the framework of inter-agency aid coordination mechanisms. For more information, please visit our website at [www.reach-initiative.org](http://www.reach-initiative.org), contact us directly at [yemen@reach-initiative.org](mailto:yemen@reach-initiative.org) or follow us on Twitter at [@REACH\\_info](https://twitter.com/REACH_info).

1. REACH, *Inter-Agency Joint Cash Study: Market Functionality and Community Perception of Cash Based Assistance*. December 2017 (link : <https://bit.ly/2FqH4UV>).