REACH Joint Market Monitoring Initiative (JMMI) – September 2026 round

Presentation of preliminary findings: CMWG Meeting

Yemen – Sep 2026

REACH Informing more effective humanitarian action

CMWG CASH & MARKET WORKING GROUP YEMEN

CCY إتحاد المساعدات النقدية في اليمن CASH CONSORTIUM OF YEMEN

Funded by European Union Humanitarian Aid

WASH Cluster Water Sanitation Hygiene

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01

Methodology

Methodology

1 **Collect**

Enumerators interview vendors (KIs) with a structured survey: NFI and WASH vendors, water truckers, currency exchange offices, fuel stations and pharmacies.

2 **Check**

REACH checks the data for outliers and errors.

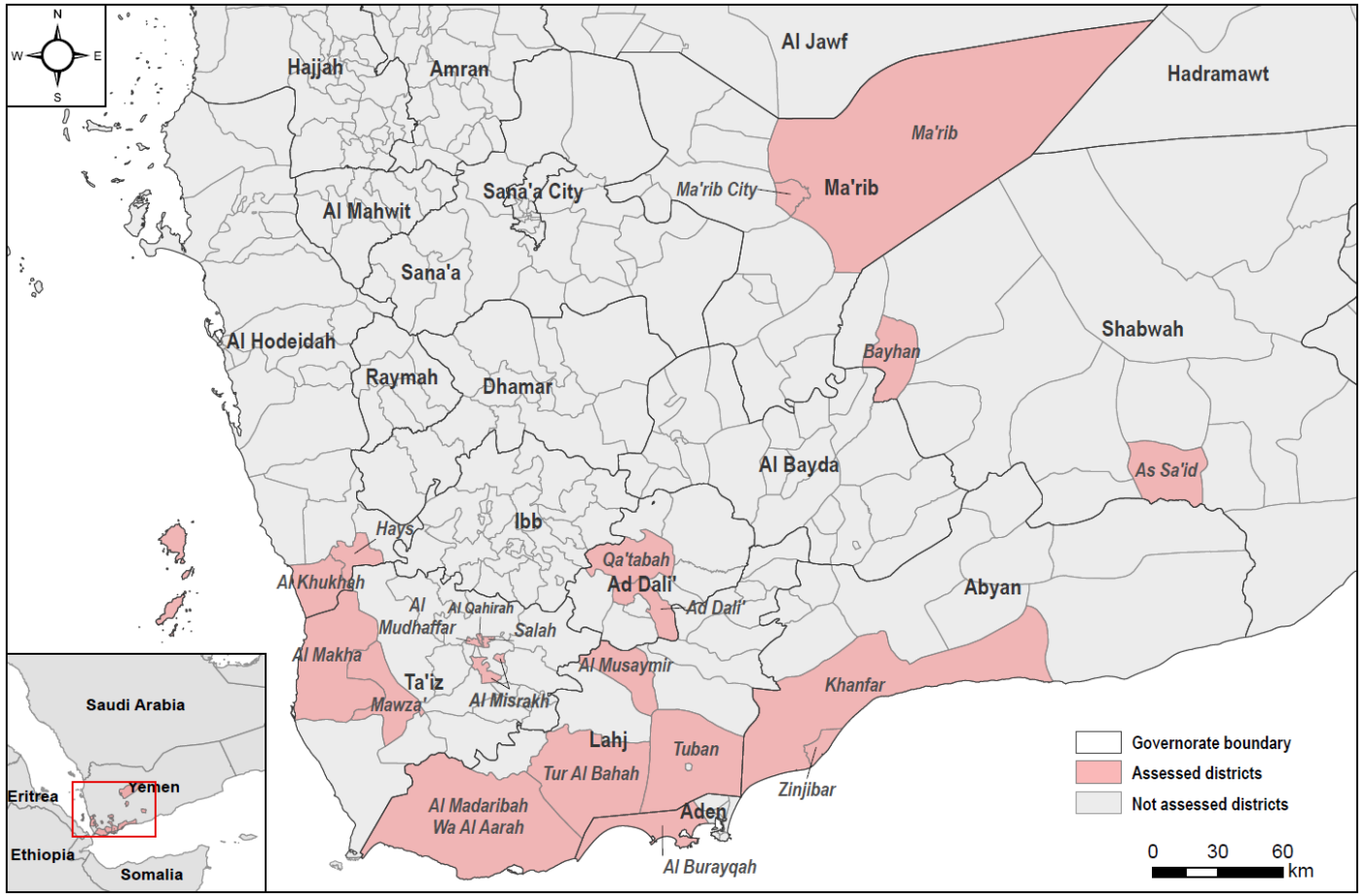
3 **Calculate**

At least 3 price observations per item, per district (ideal case); prices are calculated as medians.

4 **Interpret**

All findings are **indicative** for the markets and districts assessed.

Assessed districts in Sep 2026



Methodology update

In 2026, as part of efforts to harmonize monitoring in Yemen, the JMMI has been adjusted to replace food item monitoring with the monitoring of Non-Food Items (NFIs). This change aims to reduce duplication of work among partners. The inclusion of NFIs will fill critical information gaps needed by implementing partners, leading to the addition of 22 NFI items: 19 are priced, and 3 more (kitchen towel, brush and dustpan, firewood) are tracked for availability only.

Shelter & bedding

- Heavy blanket · piece
- Blanket · 1.5 × 2 m
- Sleeping mattress · piece
- Sitting mattress · piece
- Plastic sheet · piece
- Mosquito net · piece
- Wooden pole · 4 m long
- Wooden plate · 4 m long

Household & kitchen

- Bucket · litre
- Jerrycan · litre
- Oven / stove · piece
- Kitchen utensils set · set
- Cleaning sponge · piece
- Kitchen towel · roll
- Brush and dustpan · piece

Agriculture & livelihoods

- NPK-15 fertilizer · kg
- DAP fertilizer · kg
- Wheelbarrow · piece
- Shovel · piece
- Woven sack · piece

Energy

- Solar lamp · piece
- Firewood · m^3

Methodology Note for Market and Price Monitoring in Yemen was produced by REACH in April 2024, in partnership with FSAC, WFP, and FAO. Its purpose is to enhance data triangulation and create robust, evidence-informed technical guidelines.

JMMI WASH component of MEB Calculation Methodology

WASH component of the MEB: monthly basket for one household



***Notes**

- Median MEB prices are calculated using the updated CMWG MEB guidance (August 2024).
- The food component is no longer monitored, so the total MEB cannot be calculated; only the WASH component is reported.
- The Market Functionality Score (MFS) is included for this round.

02

JMMI Coverage

JMMI Coverage: September 2026 Round

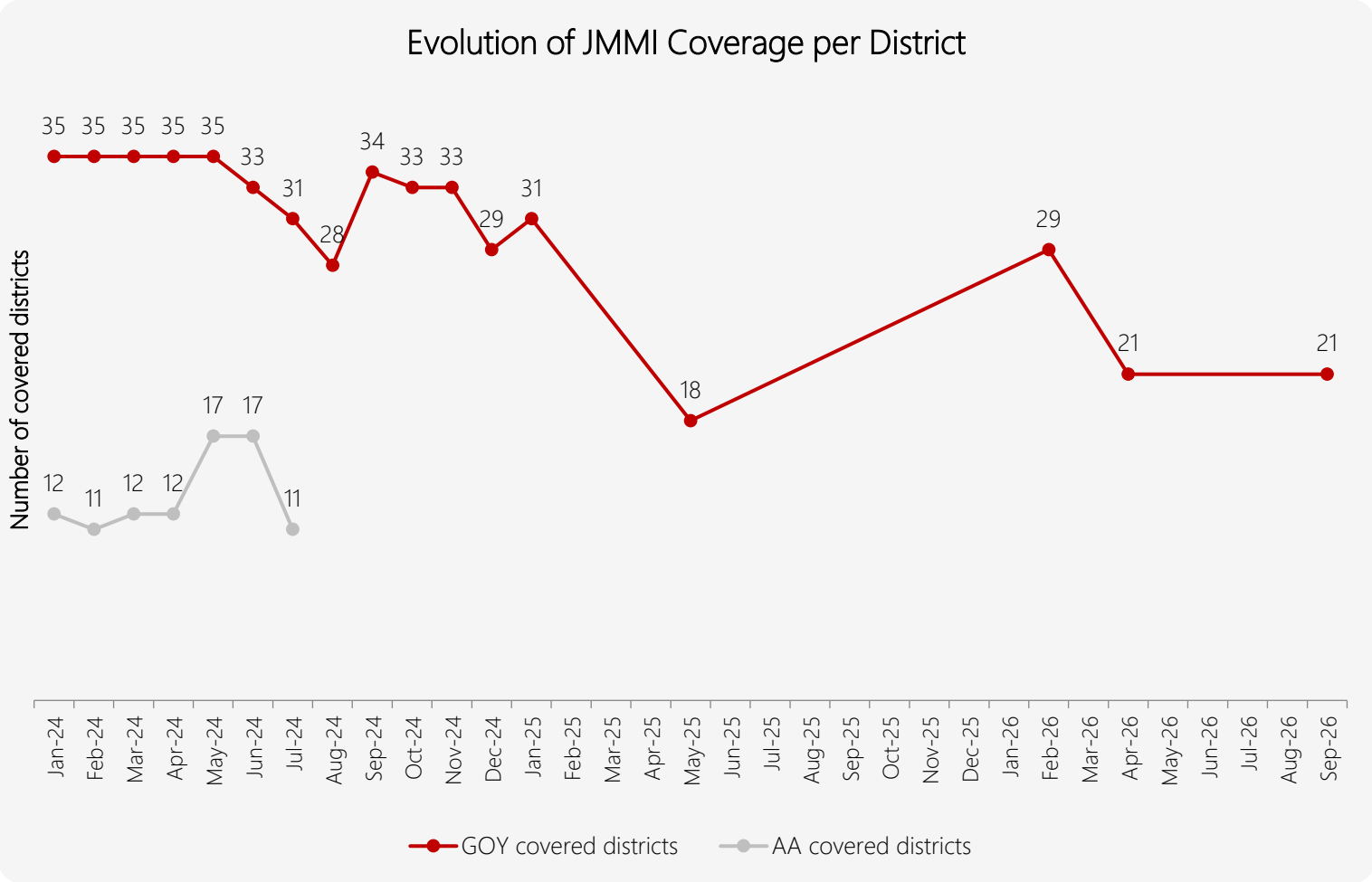
- Data collection between **1 September and 10 September 2026**
- **14** partners
- **8** governorates in GoY area
- **21** districts in GoY area
- **63 markets in GoY area**

Data Collection Partners

Partners	# of Survey
NMO	69
SHS	67
DEEM	54
ACTED	36
BFD	30
Prosper_Global	24
YKF	23
IOM	21
ARD-Y	18
ZOA	14
NAHR	6
SDF	4
QRCS	1
SDHGF	1

Note: partners rose from 6 in April to 14 in September, but district coverage held at 21. The recent escalation of conflict closed the targeted markets in some districts, west of Taizz, and in other areas, which prevented data collection there.

JMMI - Coverage



In Sep 2026, 21 districts were covered in GoY areas

The JMMI has witnessed **fluctuations and reduction in coverage** since 2023 due to **1)** restricting market monitoring data collection activities by authorities (AA areas), **2)** lack of partner capacity, **3)** end of interventions/ activities or **4)** loss of interest

Coverage	Across 2023	Dec 2024	Jan 2025	May 2025	Feb 2026	Apr 2026	Sep 2026
Partners	17	11	10	6	9	6	14
Governorate	14	7	7	5	9	7	8
District	57	29	31	18	29	21	21

03

Key findings

Key Messages on Price Changes

WASH MEB

+25%

47,022 YER in Sep 2026, up from 37,633 in April, reversing the Feb–Apr decline.

42% above the transfer value (33,149 YER)

COOKING GAS

+17%

13,912 YER per cylinder, after staying flat from February to April.

28% above the transfer value (10,865 YER)

EXCHANGE RATE

Stable

1,555 YER/USD, holding the 39% fall since May 2025.

14% below the transfer value (1,808 YER)

COOKING FUEL SCARCE

71%

of fuel vendors report it limited or unavailable; fertilizers 57–58%, firewood and diesel 35%.

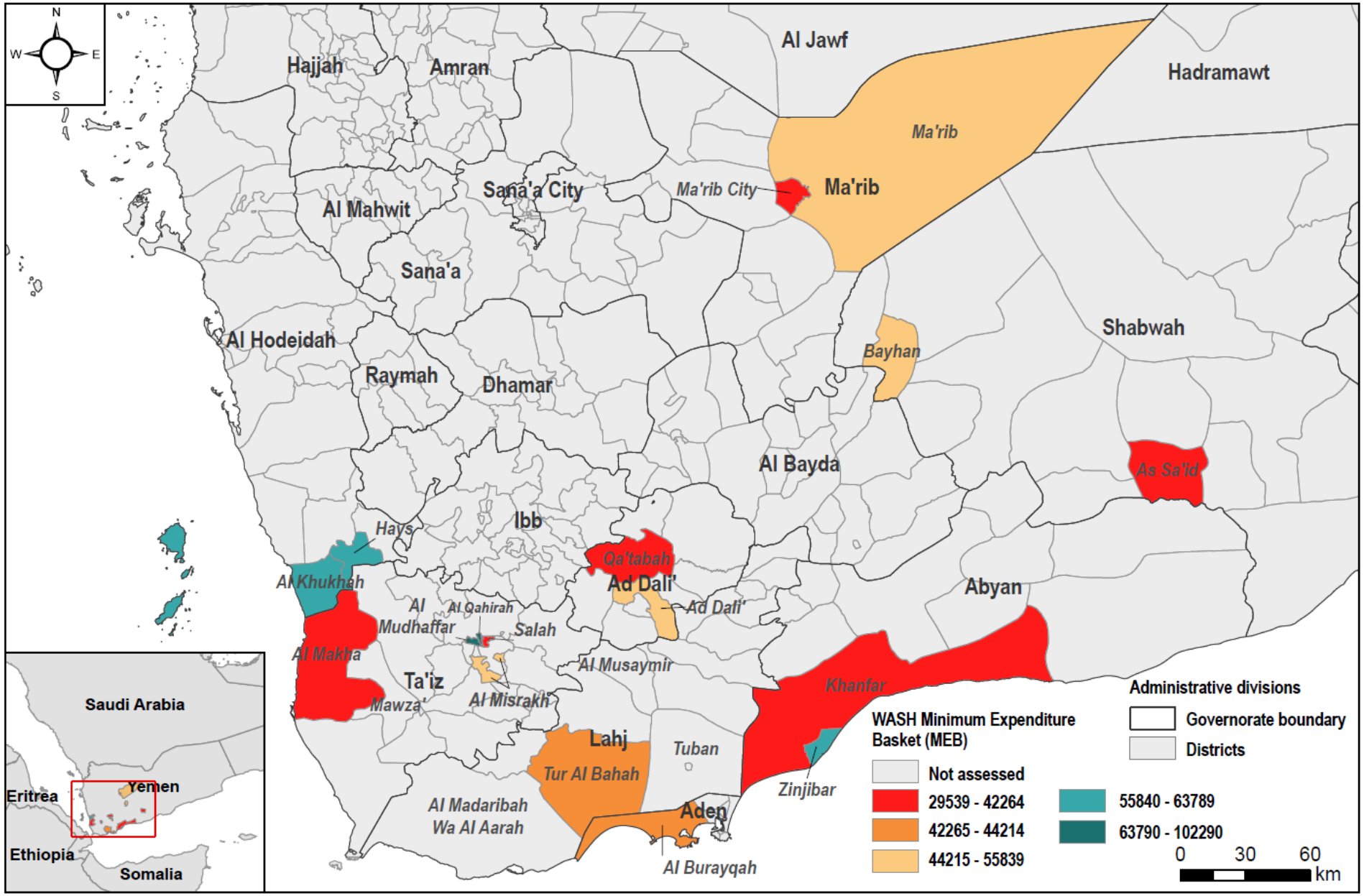
30% say fuel is too expensive for many customers

Change between Apr 2026 and Sep 2026, GoY medians. Transfer values from the CMWG MEB guidance (Aug 2024).

Indicative: coverage differs between rounds

Median Cost of WASH component of MEB

Sep 2026

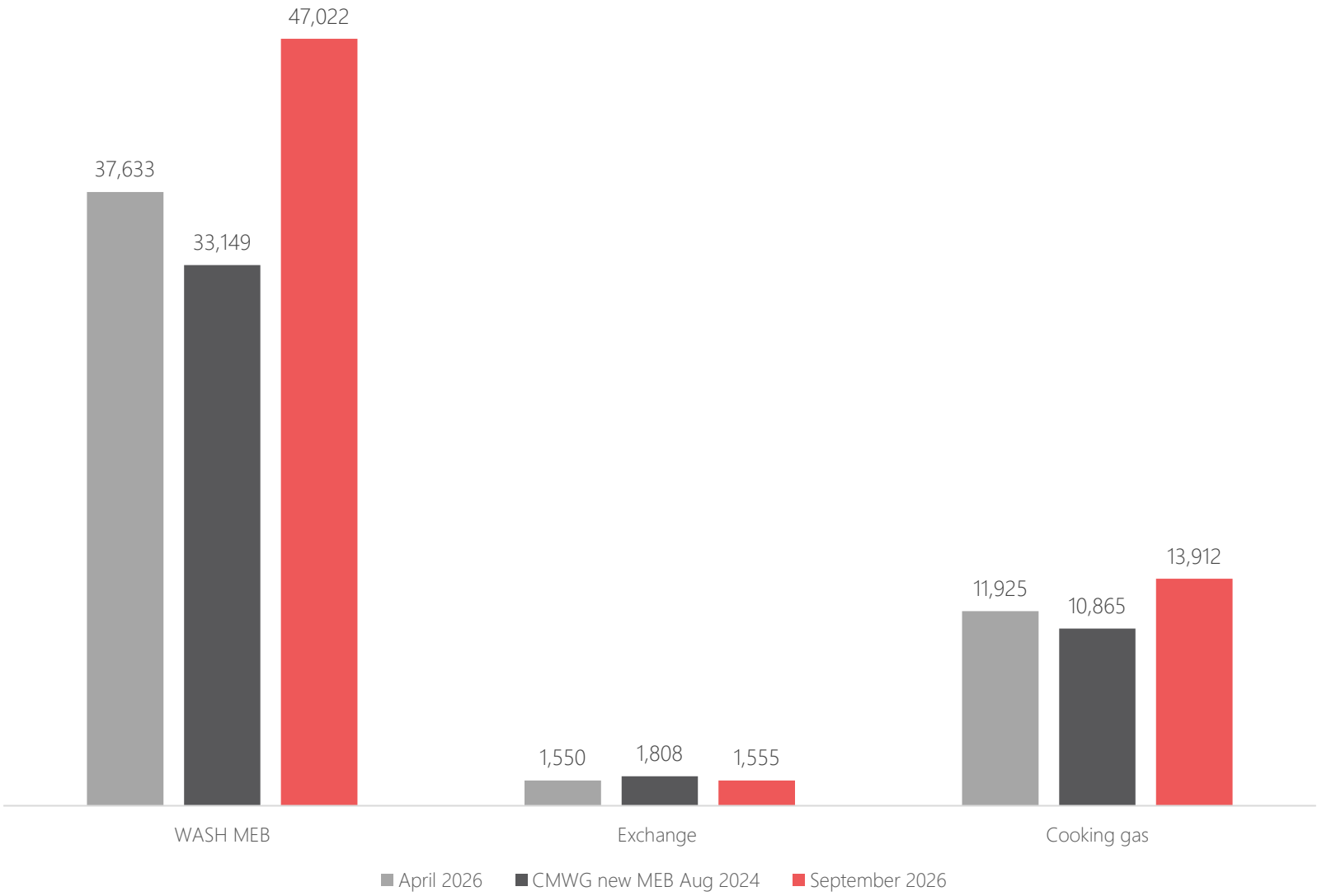


JMMI MEB price change **compared with** the updated MEB TV

Government of Yemen (GoY)

MEB items	Price change	Period
WASH MEB	**+42%**	New MEB TV Aug 2024 to September 2026
Exchange rate	**-14%**	
Cooking gas	**+28%**	

MEB items	Price change	Period
WASH MEB	**+25%**	April 2026 to September 2026
Exchange rate	<1%	
Cooking gas	**+17%**	



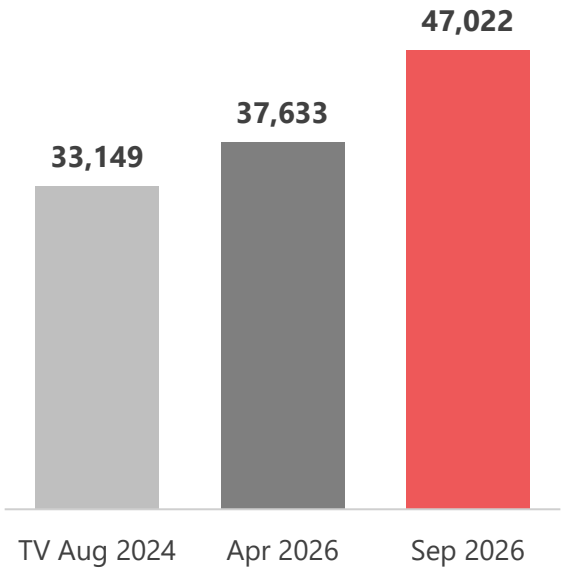
Indicative: coverage differs between rounds

Prices vs the MEB Transfer Value

transfer value (Aug 2024), April 2026 and September 2026

WASH MEB

YER per month

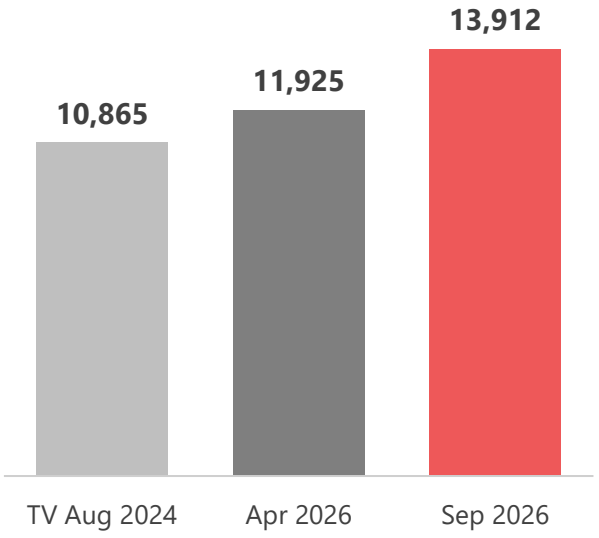


+42% vs transfer value

+25% vs April 2026

Cooking gas

YER per cylinder

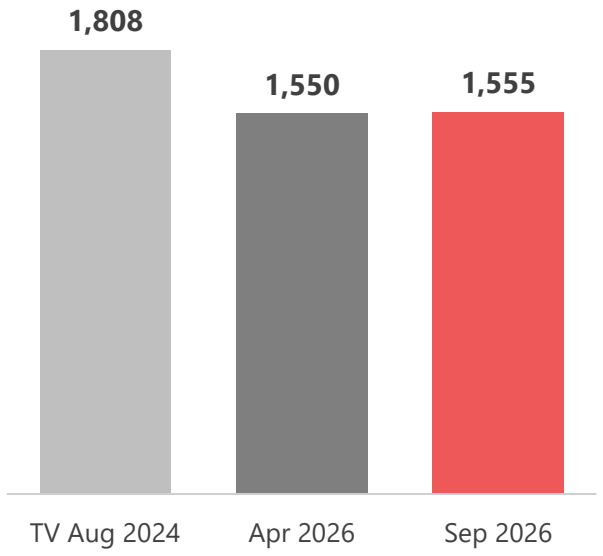


+28% vs transfer value

+17% vs April 2026

Exchange rate

YER per USD



−14% vs transfer value

<1% vs April 2026

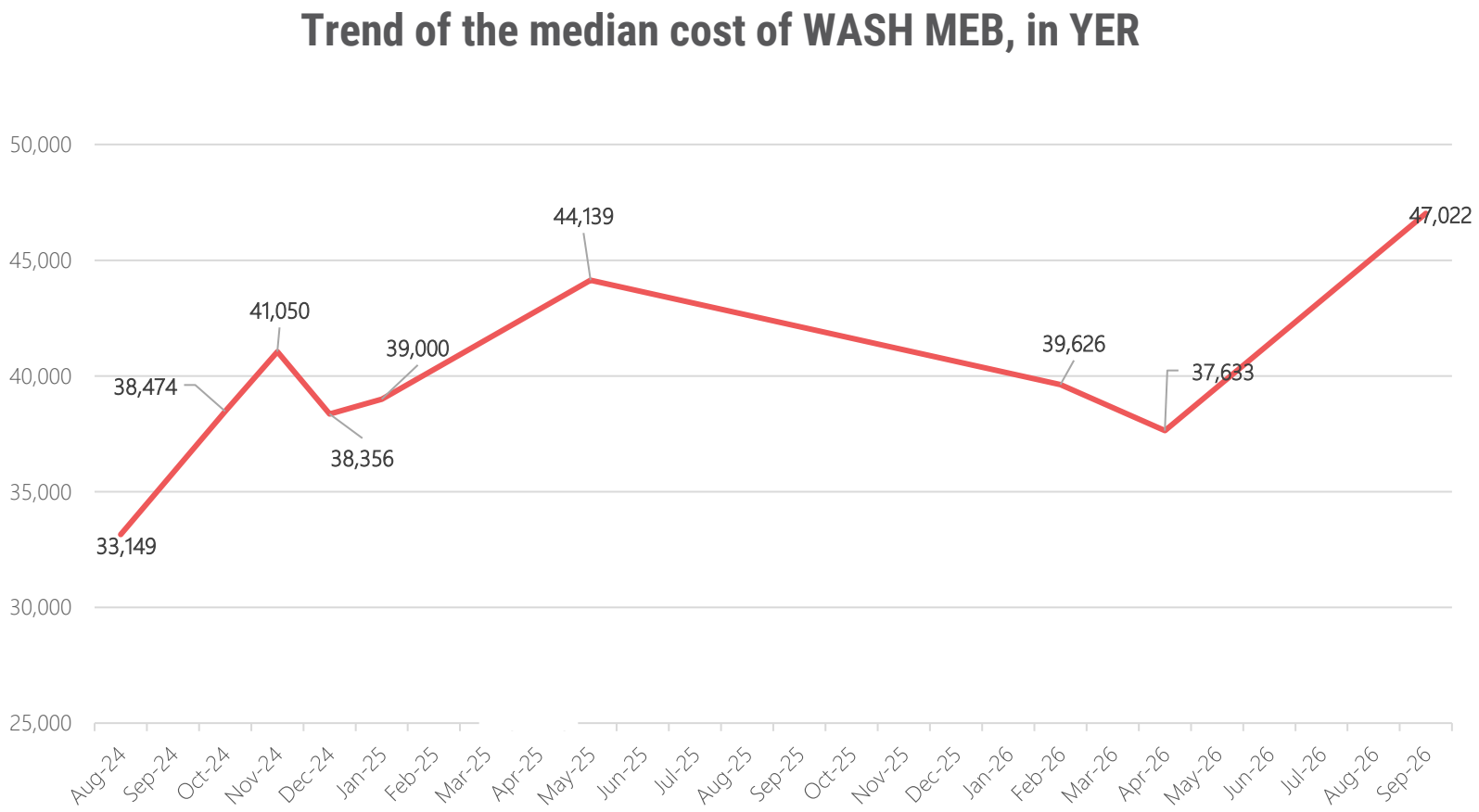
Transfer value (TV): cash amount set by the CMWG in August 2024 to cover each item. A stronger riyal (lower exchange rate) means a USD-based transfer buys 14% fewer riyals.

Indicative: coverage differs between rounds

Median Cost of WASH Minimum Expenditure Basket (MEB)

Government of Yemen (GoY)

Period	Price change
Apr 26 - Sep 26 (5 months)	**+25%**
May 25 - Sep 26 (16 months)	**+7%**
Sep 26 vs Updated TV (Since August 2024)	**+42%**

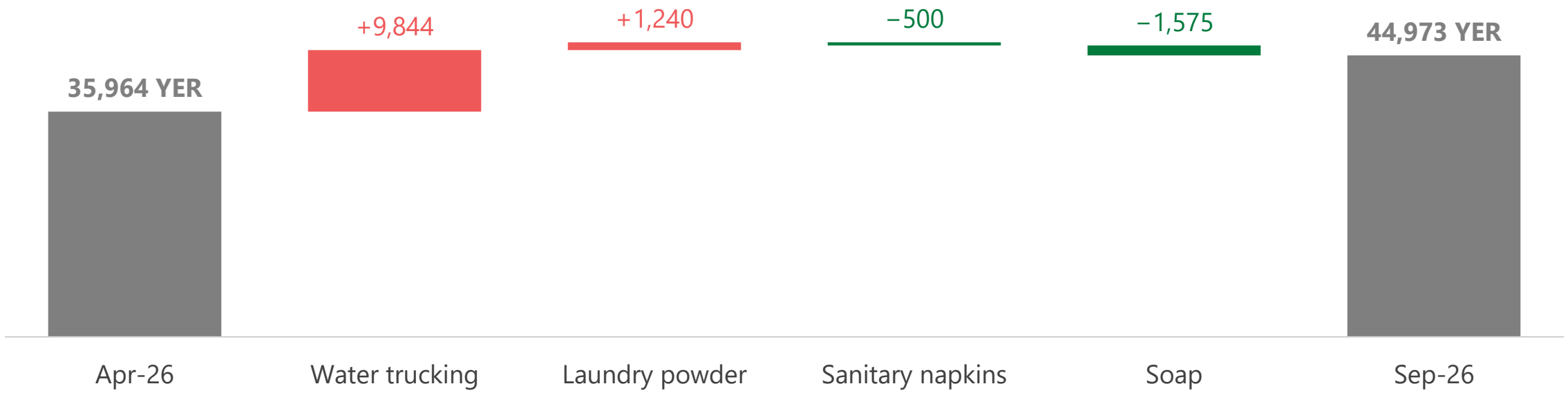


* Latest revision of the MEB TV in Aug 2024

Indicative: coverage differs between rounds

Water Trucking Drove the WASH MEB Increase

Change in WASH MEB basket cost by component, YER, Apr 2026 to Sep 2026



+78%

Water trucking price

4,000 to 7,125 YER per 1,000 L. It added 9,844 YER, more than the whole net rise.

+38%

Diesel price

Trucking runs on diesel; 31% of water truckers now report limited service, up from 4%.

−2,075 YER

Soap and sanitary napkins

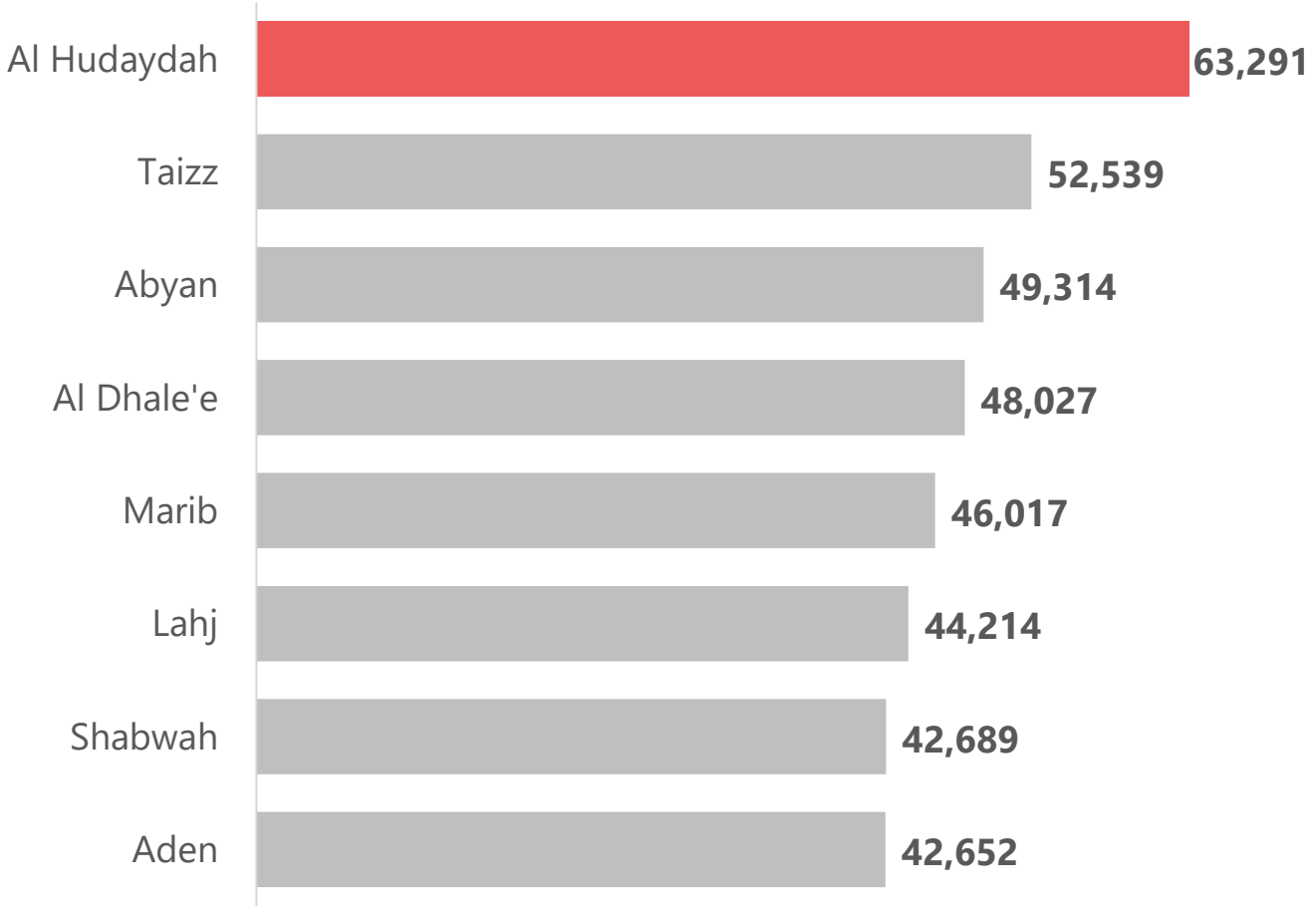
Both got cheaper, offsetting part of the increase.

Note: basket priced at GoY median component prices (10.5 × 100 g soap, 3.15 m^3 water, 20 × 100 g laundry powder, 5 packs of napkins, plus a fixed 539 YER). Totals differ from the published medians (37,633 and 47,022 YER), which are medians of governorate MEBs.

Indicative: coverage differs between rounds

WASH MEB by Governorate

Median cost of the WASH MEB by governorate, YER, Sep 2026



- **Al Hudaydah** has the costliest basket at 63,291 YER, 35% above the GoY median of 47,022 YER.
- **Aden and Shabwah** are the cheapest at about 42,700 YER, 9% below the median.
- Districts vary more in Taizz Governorate, Al Mudhaffar (102,290 YER) and Al Qahirah (99,791 YER) cost more than 3x As Sa'id in Shabwah (29,539 YER).

Note: WASH MEB not calculated for Mawza', Al Musaymir, Al Madaribah Wa Al Aarah and Tuban (missing component prices). Taizz values (Al Mudhaffar, Al Qahirah) are driven by water trucking prices still being verified; see slide 19

Governorates: April vs September

Median WASH MEB (YER) and Market Functionality Score (out of 100) by governorate

Governorate	WASH MEB Apr	WASH MEB Sep	Change	MFS Apr	MFS Sep
Al Hudaydah	36,564	63,291	**+73%**	44	67
Marib	27,891	46,017	**+65%**	56	55.5
Taizz	34,939	52,539	**+50%**	63	57
Shabwah	37,633	42,689	**+13%**	56	64
Al Dhale'e	45,593	48,027	**+5%**	52	58.5
Aden	51,349	42,652	**-17%**	63	62
Lahj	53,629	44,214	**-18%**	72	61
Abyan	-	49,314	-	-	54
GoY median	**37,633**	**47,022**	**+25%**	**60**	**59.75**

- **Al Hudaydah's WASH MEB rose 73%**, the largest rise, even as its MFS recovered from severe (44) to limited (67).
- **Marib and Taizz** also rose by half or more; (see slide 19).
- **Lahj and Aden fell** by 17–18%, and Lahj's MFS dropped 11 points.

Note: Shabwah and Aden April figures rest on one district each; Abyan was not assessed in April

Indicative: coverage differs between rounds

Taizz GOV WASH MEB: Driven by Water Trucking

Water trucking prices reported by KIs, Taizz city, Sep 2026

~100,000 YER WASH MEB in Al Mudhaffar and Al Qahirah, about twice the GoY median (47,022 YER)

District	Partner	Truck price (YER)	YER per 1,000 L
Al Mudhaffar	QRCS	80,000 / 3 m^3	**26,667**
Al Mudhaffar	DEEM	80,000 / 3 m^3	**26,667**
Al Mudhaffar	DEEM	15,000 / 3 m^3*	5,000
Al Qahirah	DEEM	80,000 / 3 m^3	**26,667**
Al Qahirah	DEEM	80,000 / 3 m^3	**26,667**
Al Qahirah	DEEM	75,000 / 3 m^3	**25,000**
Al Qahirah	Prosper Global	60,000 / 6 m^3 (3 Sep)	10,000

Possible explanations

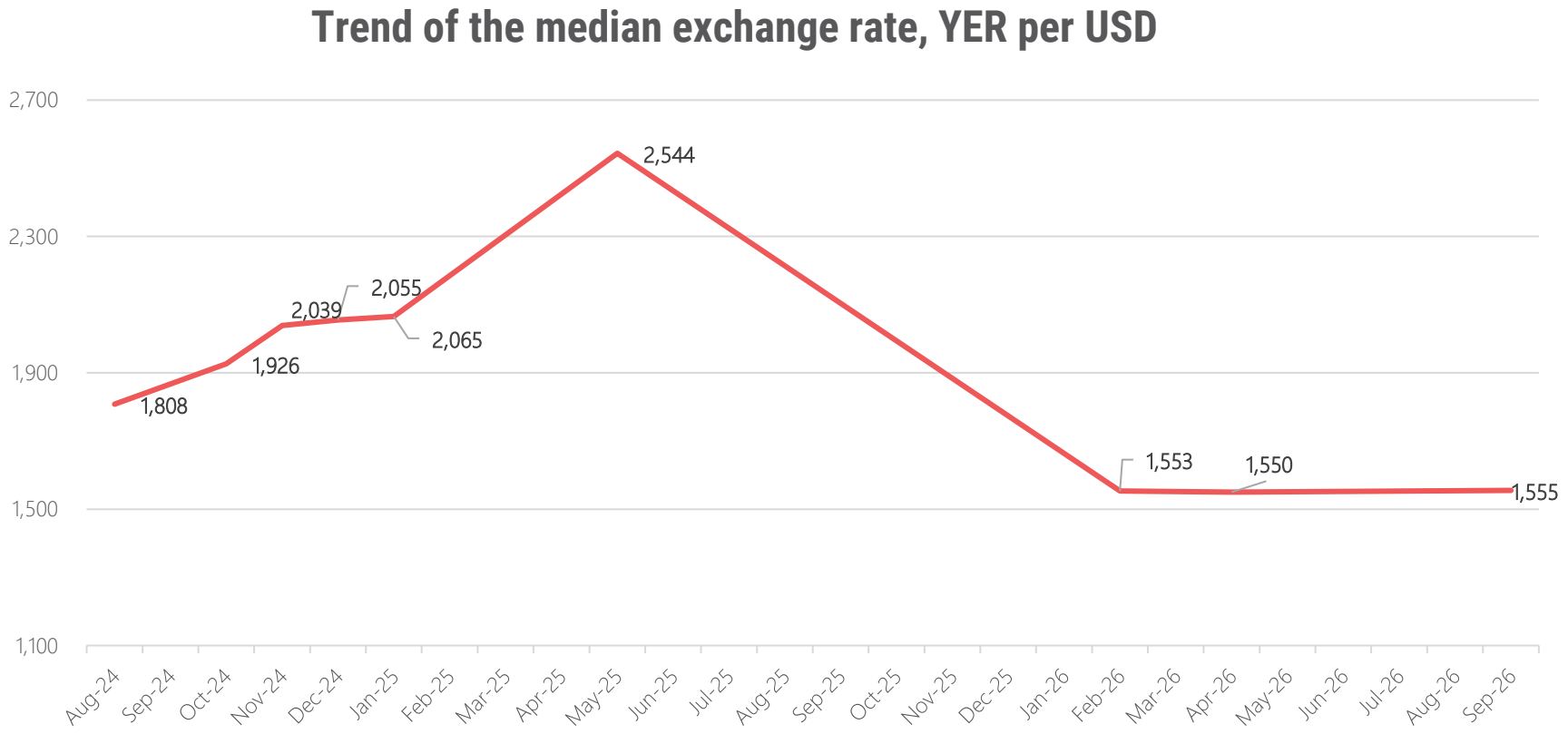
1. **Local water shortage:** 6 of 7 KIs reported limited water trucking, and traders reported disrupted water services.
2. **Probably not an entry error:** 5 of 7 KIs, from two partners, gave 75,000–80,000 YER per 3 m^3 truck.
3. **Price jump during the round:** the low price (60,000 YER per 6 m^3, or 10,000 per 1,000 L) was collected on 3 Sep; the high prices on 6–7 Sep.
4. **Partner effect:** most high values come from one partner (DEEM), so enumerator or market choice cannot be ruled out.
5. **Uncertain cleaning:** one 750,000 YER entry was changed to 15,000; 75,000 is more plausible. The district median is the same either way.

**Neither district was covered in April.

Exchange Rate

Government of Yemen (GoY)

Period	Price change
Apr 26 - Sep 26 (5 months)	<1%
May 25 - Sep 26 (16 months)	**-39%**
Sep 26 vs Updated TV (Since August 2024)	**-14%**



24% of currency vendors (15 of 63) reported a shortage of USD banknotes in the past month. The 20, 5 and 10 USD notes were cited most often (13, 12 and 10 vendors), then the 50 USD note (6), against 1 for the 100 USD note; in April, the 5 and 10 USD notes led (5 KIs). The exchange rate held at 1,555 YER/USD, but 11% of all vendors still reported difficulty getting enough banknotes to pay suppliers.

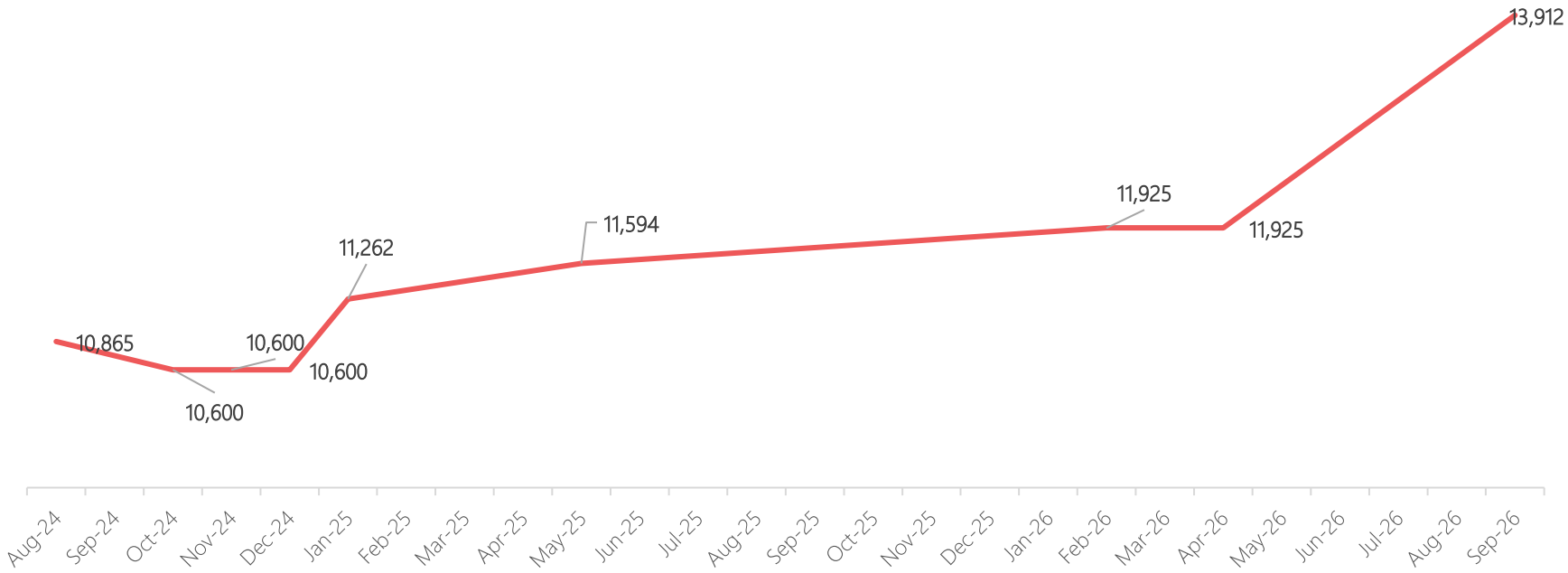
Indicative: coverage differs between rounds

Cooking Gas

Government of Yemen (GoY)

Period	Price change
Apr 26 - Sep 26 (5 months)	**+17%**
May 25 - Sep 26 (16 months)	**+20%**
Sep 26 vs Updated TV (Since August 2024)	**+28%**

Trend of the median price of 1 cylinder of cooking gas (in YER)

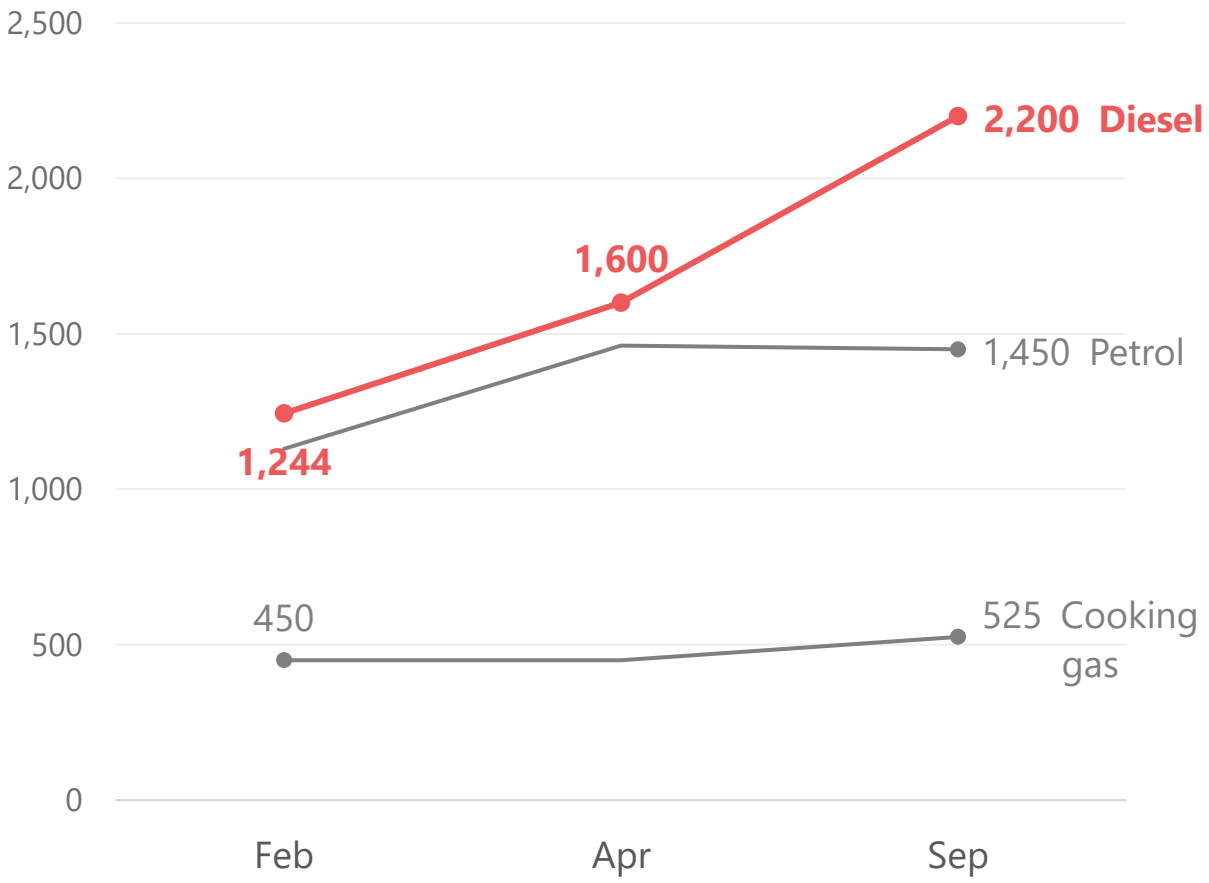


Cooking gas rose 17% since April to 13,912 YER per cylinder, after holding flat from February to April. It is now 28% above the transfer value (10,865 YER).

Indicative: coverage differs between rounds

Fuel Prices

Median fuel prices, YER per litre, GoY areas

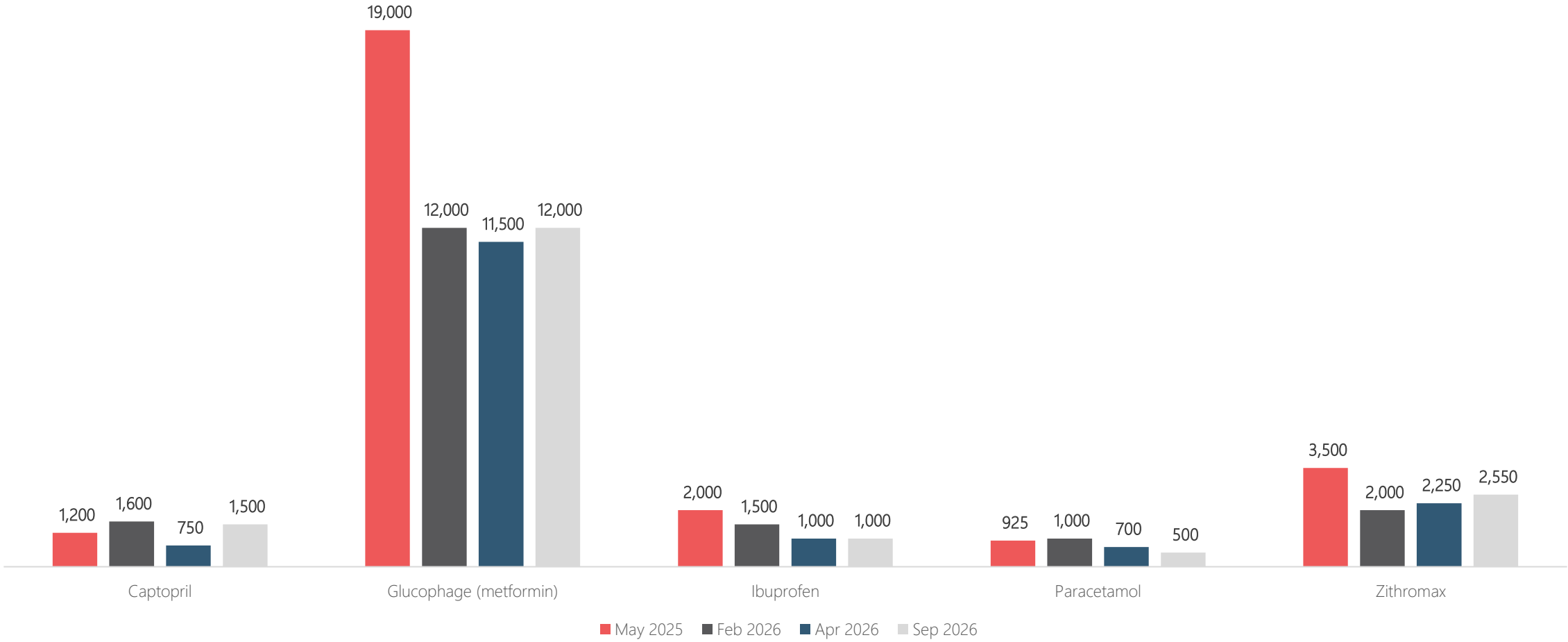


Note: medians of district medians. Cooking gas per litre; a 26.5 L cylinder costs 26.5 × this price.

- **Diesel rose 77% since February**, from 1,244 to 2,200 YER/L, and 38% since April alone.
- **Petrol held steady** at about 1,450 YER/L after a 29% jump between February and April.
- **Cooking gas rose 17% since April** (450 to 525 YER/L), its first rise in 2026.
- Diesel powers water trucks and pumps, so its rise feeds directly into the WASH MEB.

Indicative: coverage differs between rounds

Medications prices– Last 4 rounds



Captopril doubled since April (750 to 1,500 YER) and Zithromax rose 13% (2,250 to 2,550 YER). Paracetamol fell 29% (700 to 500 YER); Glucophage and ibuprofen barely changed.

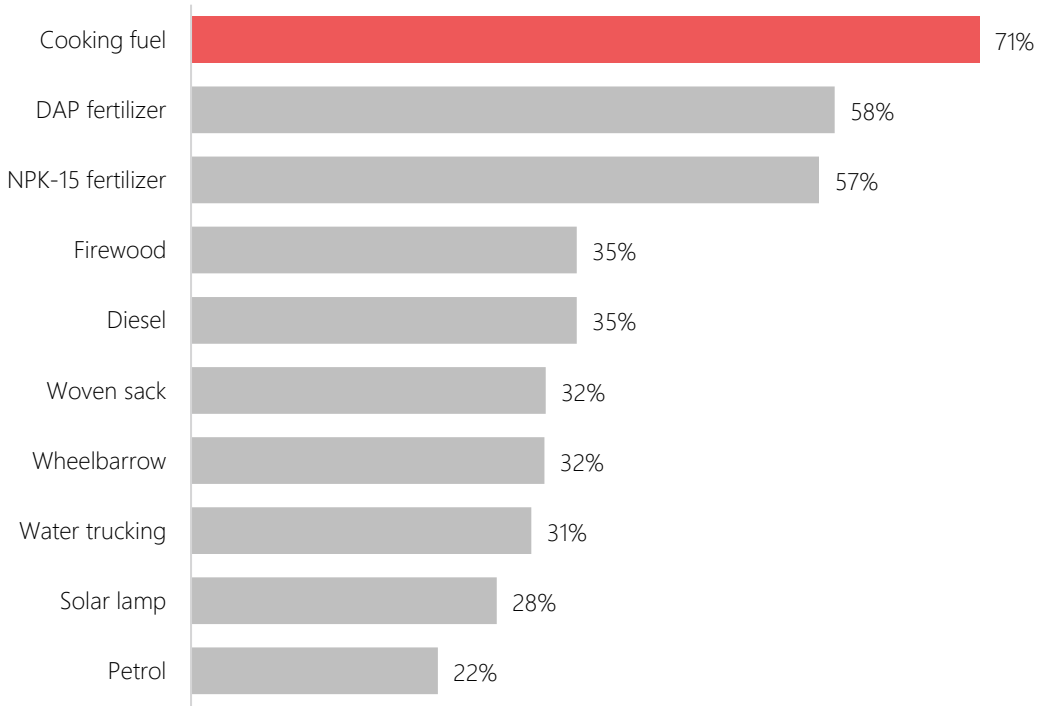
Median price per pack, YER, GoY areas.

Indicative: coverage differs between rounds

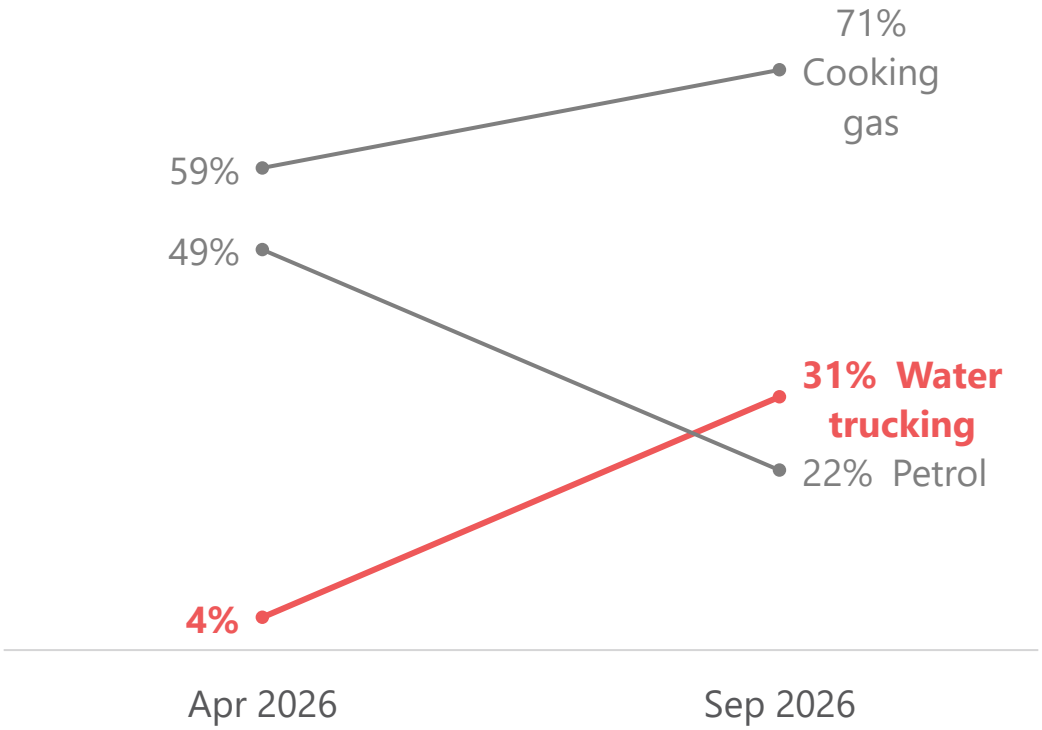
Item Availability

Share of vendors reporting the item as limited or unavailable, GoY areas

Top 10 scarcest items, Sep 2026



Change, Apr to Sep 2026



Cooking fuel is scarcest: 71% of fuel vendors report it limited or unavailable, 17% completely unavailable.

Water trucking became scarce: 31% of truckers, up from 4%, as its price rose 78%. Petrol eased (49% to 22%).

Note: % of vendor KIs selling each item (n = 49–72 per item). Firewood: availability only, no price collected

Indicative: coverage differs between rounds

04

NFI Price Comparison with Central Statistical Organization (CSO)

NFI Price Comparison with CSO*

Item	JMMI – Apr 26	JMMI – Sep 26	CSO – Jun 26
NPK-15 Fertilizer	5,000	3,125	-
DAP Fertilizer	5,000	2,500	-
Wheelbarrow	46,500	47,750	-
Shovel	5,250	6,000	-
Woven Sack	750	500	-
Jerrycan	1,200	1,650	-
Heavy Blanket	25,000	31,000	25,702 (Chinese made, 160*210)
Sleeping Mattress	24,000	18,000	15,233 (Chinese made, 150*240, plain white)
Sitting Mattress	17,000	14,500	31,167 (Uncompressed local sponge mattress 60*180, 10 cm)
Cleaning Sponge	300	200	194

*CSO: Governorates Price Bulletin, Q2 2026, June 2026 prices, average of the 8 governorates JMMI covers. JMMI: GoY medians.

Why JMMI and CSO prices differ

- **Heavy blanket:** JMMI is 21% higher. CSO prices one Chinese 160×210 blanket; JMMI covers any heavy blanket vendors sell, three months later.
- **Sitting mattress:** JMMI is less than half of CSO. CSO prices a 10 cm local sponge mattress (60×180); JMMI vendors likely report thinner or smaller ones.

The comparison is indicative only: CSO prices are June averages of specific products; JMMI prices are September medians of vendor-reported items.

Fuel and Exchange Rate vs CSO*

Item	JMMI – Sep 26	CSO – Jul 26	JMMI vs CSO
Diesel (YER/L)	2,200	2,031	+8%
Petrol (YER/L)	1,450	1,444	0%
Cooking gas (YER/cylinder)	13,912	10,938	+27%
Exchange rate (YER/USD)	1,555	1,557	0%

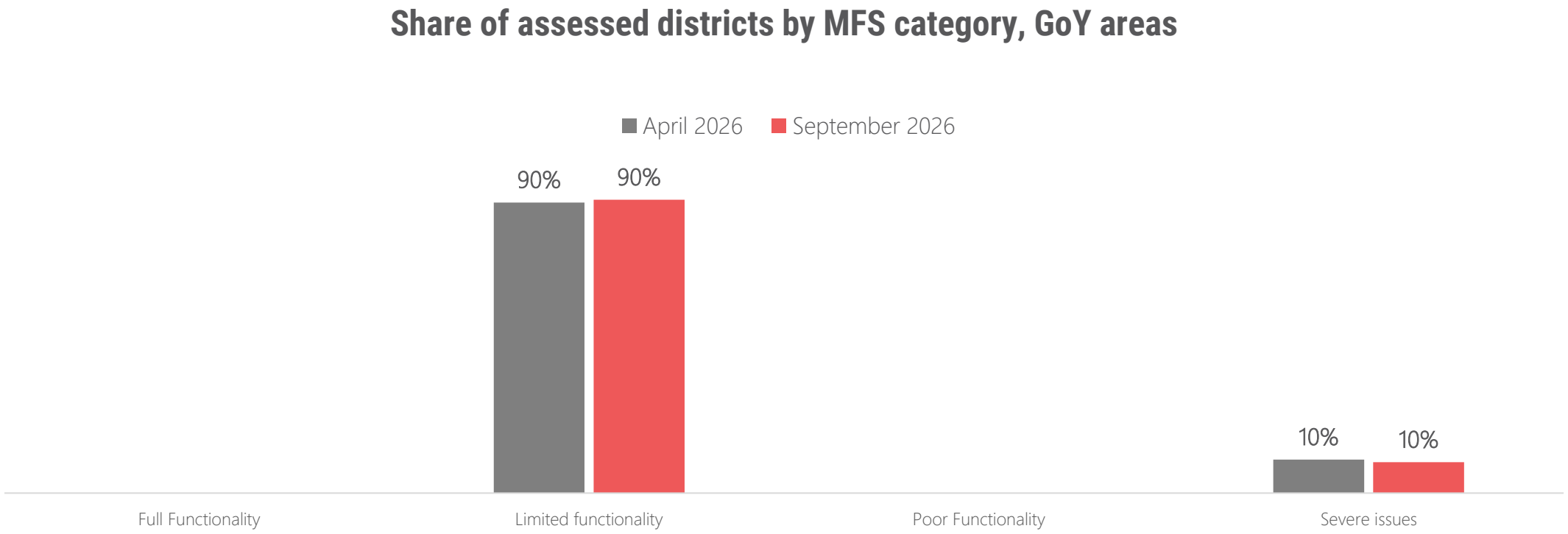
*CSO: Governorates Price Bulletin, July 2026, private-market fuel prices and buying exchange rate, average of the 8 governorates JMMI covers. JMMI: GoY medians, 1–10 Sep 2026.

The comparison is indicative only: CSO prices are from July and are averages, while JMMI prices are September medians.

05

Market Functionality Score (MFS)

Market Functionality Score (MFS)

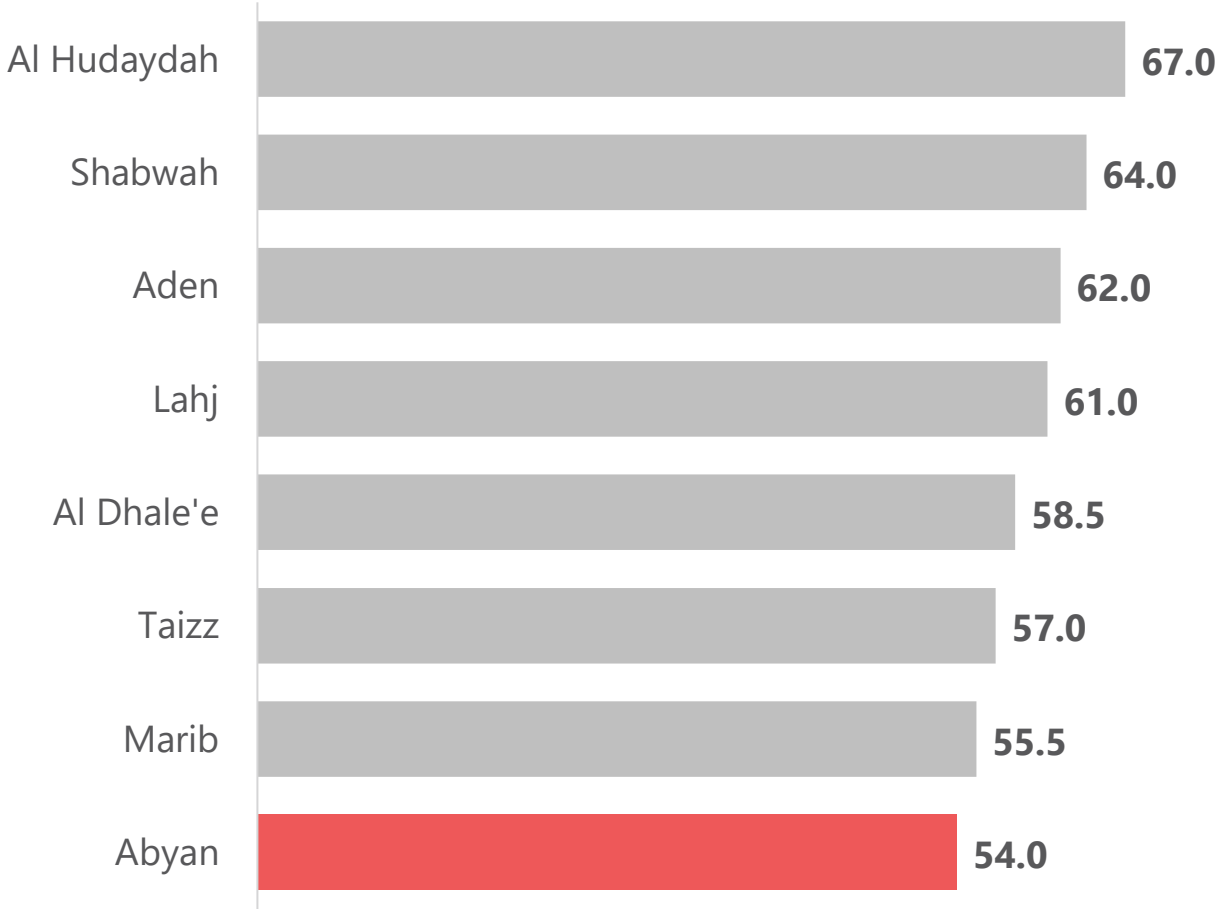


In Sep 2026, the GoY MFS was 59.75 (sum of median pillar scores). 2 of 21 districts (10%) had severe issues (Tuban and Mawza'), the same share as in April; Bayhan (51) sits just above the threshold. Fuel costs remain the main pressure: diesel rose 38% since April, from 1,600 to 2,200 YER/L, while petrol held at 1,450 YER/L (1,462 in April). 30% of vendors said fuel is too expensive for many customers.

Indicative: coverage differs between rounds

MFS by Governorate

Market Functionality Score by governorate, out of 100, Sep 2026

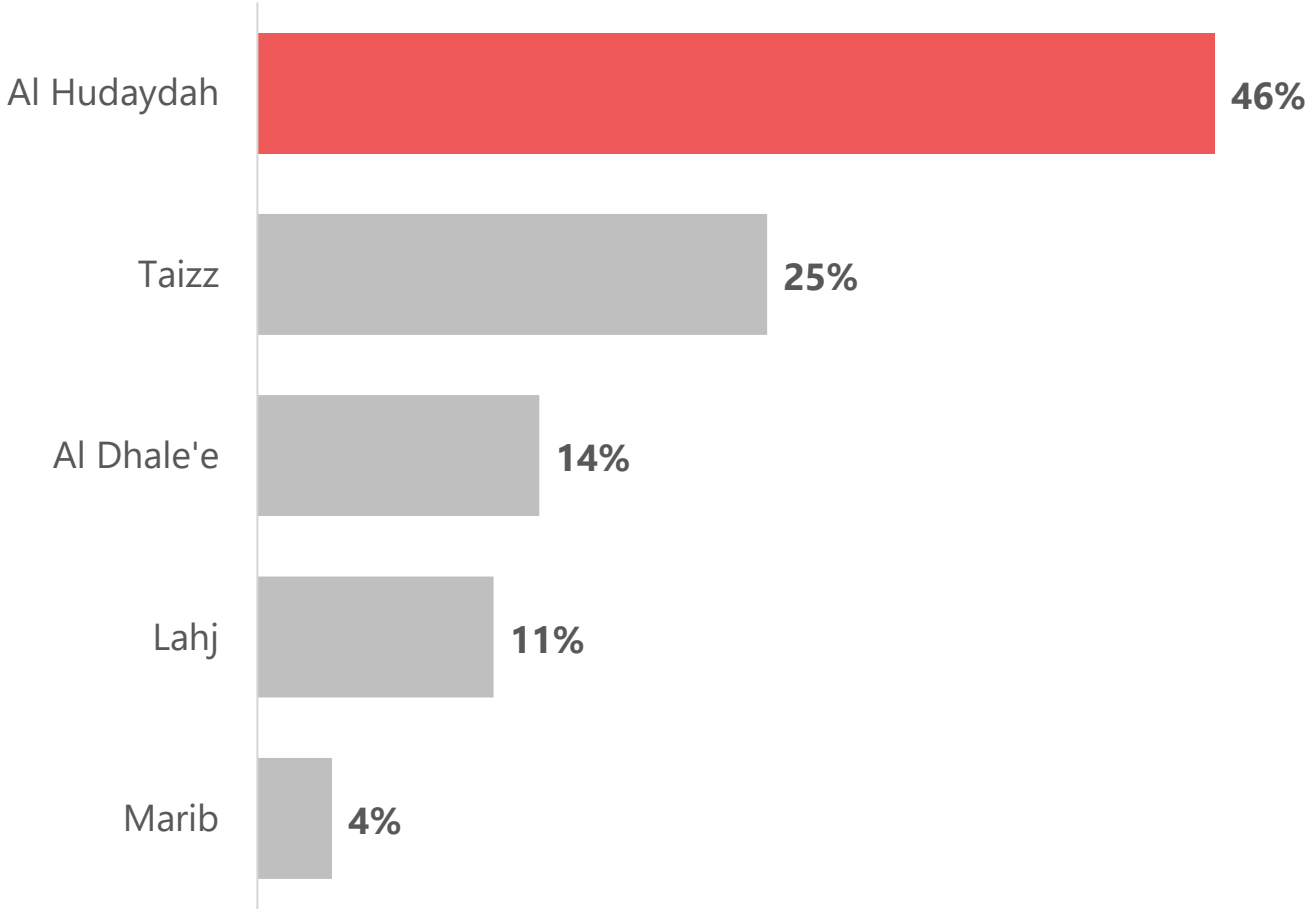


- **Markets remain under strain.** All 8 governorates rate as limited functionality and the GoY MFS was 59.75 (sum of median pillar scores). Two of 21 districts (10%) had severe issues (Tuban and Mawza').
- **Abyan, Marib and Al Dhale'e** score lowest on accessibility (11–12.5 of 25 points).
- Affordability is the weakest pillar everywhere, at 4.5–7 points.
- Two districts score severe issues: Tuban (46, Lahj) and Mawza' (48, Taizz). Bayhan (51, Shabwah) is just above the threshold.

Note: MFS combines accessibility, availability, affordability, resilience and infrastructure pillars; scores of 50 or below are rated severe issues.

Mokha Port Disruption

Share of vendors reporting that events at Mokha port affected their marketplace, by governorate, Sep 2026



- **18% of vendors** said events at Mokha affected their marketplace; impacts reported were negative.
- **Most vendors did not know the port's status** (58%); 26% believed it was fully closed.
- **Fuel and household NFIs** were the goods most often affected (17% each of affected vendors).
- **All 10 vendors who rerouted** now source through Aden, and all report higher transport costs.

Note: perceptions before the change of control at Mokha on 10 Sep 2026; Aden, Abyan and Shabwah not shown. Subgroups (affected n=66, rerouted n=10) are indicative only.

General Market Context & Key Challenges

In Sep 2026, 55% of the 368 vendors interviewed reported no operational difficulties. The most cited challenges were:



Supply side: among the 167 vendors reporting difficulties, not enough banknotes to pay suppliers (24%) and supplier price increases (23%), then unreliable electricity (20%) and customs fees (17%).



Demand side: of all 368 vendors, 30% said fuel is too expensive for many customers; customers cannot pay in a form vendors accept (27%), cannot afford items (22%) or lack cash (20%).



Payments: 97% of vendors accept local cash, 42% foreign cash, 34% money transfers and 32% mobile money.

Implications for the CMWG

Points for the CMWG and their partners to discuss, based on the September 2026 findings:

Review the WASH transfer value: the WASH MEB (47,022 YER) is now 42% above the transfer value set in August 2024 (33,149 YER).

Look at Al Hudaydah, Marib and Taizz first: their WASH MEB rose 50–73% since April.

Watch diesel and water trucking: diesel rose 38% and water trucking 78% since April, and 31% of truckers report limited service.

Keep monitoring Mokha: 46% of Al Hudaydah vendors reported impacts; repeating the module next round would show the effect of the change of control.

06
Lessons learned

Limitations



Conflict limited coverage

Partners rose from 6 to 14, but the escalation of conflict closed targeted markets west of Taizz and in other areas, so coverage stayed at 21 districts.



Incomplete prices in four districts

The WASH MEB could not be calculated for Mawza', Al Musaymir, Al Madaribah Wa Al Aarah and Tuban, where some component prices were not available.



Comparability with April is partial

Aden and Shabwah April figures rest on one district each, Abyan was not assessed in April, and free-text market names make the market count approximate (63).

JMMI Outputs



Datasets

Cleaned datasets of individual JMMI rounds



Interactive Dashboard

Access to longitudinal data, visualization and analysis tools.

Thanks for attending

| Lara Daradkeh: lara.daradkeh@reach-initiative.org

REACH Informing more effective humanitarian action

April vs September 2026 at a Glance

Median prices, GoY areas, Apr 2026 and Sep 2026 rounds

Indicator	Apr 2026	Sep 2026	Change
WASH MEB	37,633 YER	47,022 YER	**+25%**
Exchange rate	1,550 YER/USD	1,555 YER/USD	<1%
Cooking gas (26.5 L cylinder)	11,925 YER	13,912 YER	**+17%**
Diesel (1 L)	1,600 YER	2,200 YER	**+38%**
Petrol (1 L)	1,462 YER	1,450 YER	**-1%**
Unskilled daily wage	5,000 YER	6,500 YER	**+30%**
Districts with severe MFS issues	10%	10%	**No change**

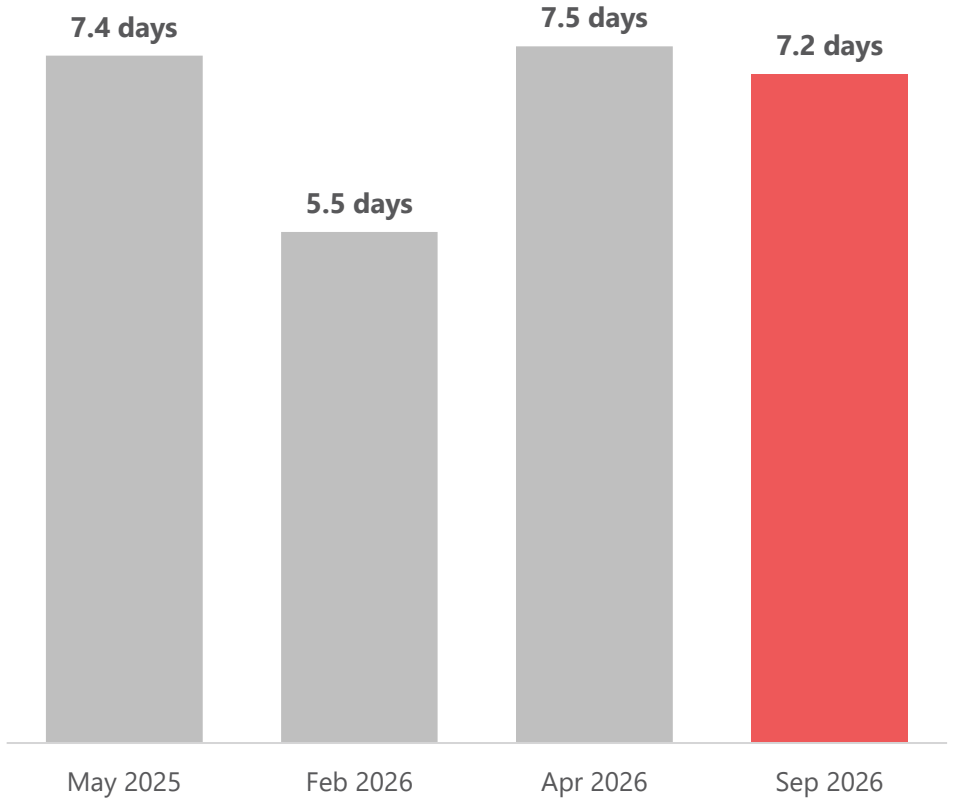
The exchange rate held steady, so **the rises in WASH, cooking gas and diesel prices were not driven by currency movements.**

Note: change in red = higher cost for households; green = lower cost or higher wage..

Indicative: coverage differs between rounds

WASH MEB in Days of Wage

Days of unskilled daily wage needed to buy the WASH MEB, GoY areas



- **7.2 days** of unskilled wage buy the WASH MEB in Sep 2026, close to April (7.5 days).
- **Wages rose 30%** (5,000 to 6,500 YER), keeping pace with the 25% rise in the WASH MEB.
- **February was the low point** at 5.5 days, when the daily wage peaked at 7,250 YER.

Note: median WASH MEB divided by median unskilled daily wage. Covers the WASH component only, not a full household basket.

Indicative: coverage differs between rounds