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**Shelter Cluster Yemen**  
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Coordinating Humanitarian Shelter

# Market Assessment in the Republic of Yemen

December 2023



**Shelter Cluster Yemen**

ShelterCluster.org

Coordinating Humanitarian Shelter

## Market Assessment Report

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<b>Abbreviations .....</b>	<b>7</b>
<b>Executive Summary .....</b>	<b>8</b>
Background      8	
Key Findings    8	
Recommendations .....	12
Map of Assessed Governorates .....	13
<b>Introduction .....</b>	<b>14</b>
1.1 Background 14	
1.2 Objective    15	
<b>Methodology .....</b>	<b>16</b>
2.1 Desk review 16	
2.2 Data Collection and Sampling .....	17
2.3 Data Management, Analysis and Interpretation .....	19
2.4 Data Quality Assurance .....	19
2.5 Ethical Considerations: .....	20
2.6 Data Confidentiality: .....	20
<b>3. Challenges and Limitations .....</b>	<b>20</b>
3.1 Challenges 20	
1.2 Limitations 21	
<b>Findings .....</b>	<b>23</b>
4.1 Shelter Materials and Non-Food Items .....	23
4.1.1 Accessibility .....	24
4.1.2 Availability 26	
4.1.3 Affordability .....	31
4.1.4 Market policies and constraints .....	34
4.2 Rental Accommodations .....	35
4.2.1 Accessibility .....	36
4.2.2 Availability 40	
4.2.3 Affordability .....	41
4.2.4 Market Policies and Constraints .....	45
4.3 Cash Transfer Services .....	46
<b>Annexes .....</b>	<b>49</b>
Annex I: Assessment Tools .....	49
Annex II: Analysis Per Governorate .....	49
Annex III: Shelter Materials and NFIs prices matrixes .....	50

## List of Tables

Table 1: Summary Sample Size.....	<b>Error! Bookmark not defined.</b>
Table 2: Geographical Scope.....	<b>Error! Bookmark not defined.</b>
Table 3: Median prices for shelter - Wooden materials .....	<b>Error! Bookmark not defined.</b>
Table 4: Median prices for shelter - Steel materials .....	<b>Error! Bookmark not defined.</b>
Table 5: Median prices for shelter - Shelter Covering .....	<b>Error! Bookmark not defined.</b>
Table 6: Median prices for shelter - Local materials.....	<b>Error! Bookmark not defined.</b>
Table 7: Median prices for shelter - Rehabilitation materials .....	<b>Error! Bookmark not defined.</b>
Table 8: Median prices for shelter - Accessories .....	<b>Error! Bookmark not defined.</b>
Table 9: Median prices for NFIs - Bedding .....	<b>Error! Bookmark not defined.</b>
Table 10: Median prices for NFIs - Kitchen/House Materials.....	<b>Error! Bookmark not defined.</b>
Table 11: Median prices for NFIs - Cloth.....	<b>Error! Bookmark not defined.</b>



## List of Figures

Figure 1: The governorates where the Assessment was carried out .....	13
Figure 2: Categorical overview of items offered by Interviewed Suppliers during Market Assessment .....	24
Figure 3: Geographic distribution of the interviewed suppliers in Market Assessment .....	24
Figure 4: Availability of Supplier's Legal Documents .....	25
Figure 5: How far is the market from you? .....	25
Figure 6: How much time does it take you to reach the local market? .....	26
Figure 7: How is the road to the market? -Yemen Southern Governorates .....	26
Figure 8: Estimated population of the surrounding villages that have access to the market – Yemen Southern Governorates.....	26
Figure 9: How to buy the materials that can be supplied .....	27
Figure 10: Availability of other suppliers selling the same type of materials in the local market .....	27
Figure 11: From where do you normally buy the key commodities .....	28
Figure 12: The alternative source of commodities .....	28
Figure 13: Have a warehouse and/or a stock of materials .....	28
Figure 14: Average of capacity of warehouse according to classification of items .....	29
Figure 15: Stock Availability.....	29
Figure 16: Replacing the sold quantity easily.....	30
Figure 17: Time will take to restock? .....	30
Figure 18: How often do you restock .....	31
Figure 19: BNFs Opinion about availability of materials in nearby markets .....	31
Figure 20: Modality Preference-Shelter Materials.....	32
Figure 21: The reason for contractor modality selection .....	32
Figure 22: Modality Preference-NFIs .....	33
Figure 23: The reason for in kind selection .....	33
Figure 24: Expectation for price increase – Yemen Sourther Governorates.....	34
Figure 25: Market Policies- Yemen Southern Governorates.....	34
Figure 26: Are you part of this association? .....	35
Figure 27 : Why did you join this association? .....	35
Figure 29: Tenant Type.....	36
Figure 28 Number of households surveyed per governorate .....	36
Figure 30: Gender of interviewees.....	36
Figure 31: Number and type of assessed rental service providers .....	36
Figure 32: Suitability and Evaluation of Housing-Yemen Northern Governorates .....	37
Figure 33: Suitability and Evaluation of Housing-Yemen Southern Governorates.....	38
Figure 34: Distance from public services .....	39
Figure 35: Availability of Lease Contract .....	39
Figure 36: Availability of rental accommodation in the area.....	40
Figure 37: In your opinion, do the IDPs face any special challenges in access and value of rental housing? Frequency .....	40
Figure 38: Number of accommodation facilities .....	41
Figure 39: Average Expected Rent.....	41
Figure 40: Monthly Rent.....	42

Figure 41: Rent amount changes- real estate agents .....	43
Figure 42: Has the rent changed in the last 6 months? .....	43
Figure 43: Your expectations about rental changes in the coming months.....	43
Figure 44: Accumulative unpaid rent -Yemen Southern Governorates.....	44
Figure 45: Accumulative unpaid rent -Yemen Northern Governorates .....	44
Figure 46: Negative and Positive Impact (Rent cash provision) .....	45
Figure 47: Are their financial services providers in the area? .....	46
Figure 48: Access to financial services providers .....	46

## Abbreviations

<b>CBI</b>	Cash Based Interventions
<b>HRP</b>	Humanitarian Response Plan
<b>KII</b>	Key Informant Interview
<b>NFI</b>	Non-Food Item
<b>TOR</b>	Term of Reference
<b>TPM</b>	Third Party Monitoring
<b>UNHCR</b>	United Nations High Commissioner for Refugee
<b>YSC</b>	Yemen Shelter Cluster
<b>CBI</b>	Cash Based Interventions
<b>HRP</b>	Humanitarian Response Plan
<b>KII</b>	Key Informant Interview
<b>IDPs</b>	Internal Displacement Persons
<b>BNFs</b>	Beneficiaries





## Executive Summary

### Background

This comprehensive report presents the findings of a Shelter, Non-Food Items (NFIs), and rental market assessment conducted in Yemen from July month to November month 2023. The assessment aimed to gather data and insights on the current market situation of shelter and NFIs, as well as the rental market dynamics in 56 districts across 13 governorates, in order to inform decision-making processes and interventions of the Shelter Cluster in the context of ongoing crisis in Yemen.

The assessment employed a mixed-methods approach, combining qualitative and quantitative research methods, including 87 real estate agents and 93 landlords' interviews, 1598 suppliers KIIs, and 7560 individual surveys (including IDPs, IDP returnees, and Host communities). The overall findings revealed positive market accessibility, availability, affordability and market reform and policies for the NFIs and Shelter materials, as well as the rental accommodation market. The report findings provide evidence-based recommendations to support the Yemen Shelter Cluster and its partners in updating their activity matrix, multi-year strategy, and Humanitarian Response Plan (HRP) for 2024

### Key Findings

#### Shelter Materials and NFIs Accessibility

- **Legal Compliance:** The majority of NFIs and Shelter materials suppliers in Yemen have all the necessary legal documents, demonstrating a strong commitment to legal compliance and operating within applicable laws and regulations.
- **Distance and Market Accessibility<sup>1</sup>:** The average distance to the market from interviewed households is 2-4 km, taking around 15 minutes to reach by bus. The road topography is mainly paved in the Yemen's Southern Governorates, indicating relatively easier access.
- **Catchment Area:** The targeted markets in Yemen have a large catchment area, with surrounding villages observed to have access to these markets. This suggests that the markets have the capacity to meet the urgent demands of the affected population.

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<sup>1</sup> Its only for Yemen Southern areas in Aden, Abyan, Taizz , Marib , Lahij, Al Hudaydah and Ad Dali. The majority of the targeted districts are Urban

- **Market Potential:** The findings emphasize the potential of the targeted markets to extend support to the large demand and meet the urgent needs of the affected population for shelter materials, NFIs, and rental accommodation.

## Availability

- **Supply Chain Sources:** Suppliers mainly purchase materials both by retail (representing 75.5% of interviewees) and wholesale (representing 71.45% of interviewees), indicating a combination of direct interaction with end consumers and larger-scale suppliers. This supports flexibility and availability of materials.
- **Alternative Suppliers:** The majority of local markets have multiple suppliers offering the same type of shelter materials and NFIs, ensuring competitive markets and reducing dependency on a single supplier. This availability of alternative options benefits beneficiaries by offering price balance and flexibility.
- **Local Sourcing:** A significant proportion of supplier's source key commodities locally within the country, either from the first importer at the country or governorate level, or directly from the main producer. This highlights the reliance on local suppliers and contributes to the availability of materials.
- **Warehouse Capacity:** The majority of suppliers have warehouses (representing 79% of interviewees) and maintain a stock of materials (representing 90.6% of interviewees). This indicates the suppliers' ability to store large quantities of goods and fulfil customer orders efficiently. Different types of materials require varying warehouse capacities, with building materials requiring more space compared to NFIs.
- **Meeting Demand:** The available materials in the market meet the demand for shelter materials (representing 94.1% of interviewees) and NFIs (representing 93.2% of interviewees). This equilibrium between supply and demand contributes to price stability and market efficiency.
- **Replenishment Capability:** Suppliers have the capability to replace the sold quantity easily, with 91.6% of interviewees confirming their ability to do so. This ensures that they can quickly replenish inventory in case of urgent big demands, maintaining a continuous supply of materials.
- **Restocking Timeframes:** The majority of suppliers can restock their inventory within one week (representing 44.7% of interviewees), followed by three days (representing 30.1% of interviewees). Understanding these restocking timeframes helps in effective supply chain management and planning.
- **Restocking Frequency:** Suppliers follow different restocking frequencies, with monthly restocking (representing 45% of interviewees) and bi-monthly restocking (representing 39% of interviewees) being the most common. This information can guide organizations in aligning their procurement and restocking strategies with suppliers' restocking frequency.
- **Perceived Availability:** Affected populations perceive that shelter materials and NFIs are available in nearby markets. This perception supports the preference for cash modalities for shelter assistance, as it reinforces the accessibility and availability of materials locally.

## Affordability

- The study on modality preferences for shelter materials reinforces that the **majority of households** (representing **55.3%** of interviewees) **preferred cash assistance** to purchase materials, highlighting their desire for independence and choice. Additionally, a significant portion (representing 22.75%) opted to hire a contractor, indicating the value placed on professional expertise. Some reasons for choosing a contractor included physical limitations or lack of expertise within the family (representing 43%), lack of skilled labor (representing 39%), and difficulty in acquiring materials (representing 18%). A smaller percentage (representing 22.45%) preferred receiving materials and performing the physical work, indicating their active participation in the construction process.
- The study on modality preferences for receiving Non-Food Items (NFIs) highlights that **the majority of households** (representing **69.7%**) **preferred cash assistance** for NFIs, allowing them to purchase materials

from local markets and reflecting their desire for self-sufficiency and choice. Additionally, about 30.3% of respondents still preferred receiving shelter assistance in kind due to various reasons, including the possibility of using the cash amount for other family needs (representing 35% of interviewees), concerns about cash insufficiency (representing 25%), the convenience of having materials delivered to their residence (representing 17%), perception of better-quality materials (representing 11%), and other specific requirements or preferences (representing 3%).

- The report provides price matrixes for shelter materials and Non-Food Items (NFIs) collected during the assessment period, showcasing the minimum, maximum, and median prices for these items across assessed areas of Yemen's Northern and Southern Governorates. The average exchange rates during the data collection period were 1,420 YER/1 USD in the Yemen Southern Governorates and 527 YER/ 1 USD for the Yemen Northern Governorates, providing a basis for understanding local currency values in relation to the US dollar.
- The assessment revealed that approximately 43.7% of suppliers in the Yemen Southern Governorates expected an increase in the cost of shelter items, while about 49.9% anticipated rising costs for non-food items (NFIs). These expectations were primarily attributed to currency deterioration and cost inflation. Currency deterioration would lead to higher costs for imported materials and goods, while cost inflation encompassed rising production, transportation, and labor costs. These findings emphasize challenges impacting the affordability and availability of shelter items and NFIs and highlight the importance of monitoring and establishing proactive measures to mitigate the impact of cost increases on vulnerable populations.

## **Market policies and constraints**

- Approximately 74% of suppliers reported the absence of market regulations or formal oversight, indicating an unstable market environment without proper control or management. This lack of regulations can lead to challenges related to market stability, fair competition, and consumer protection.
- Around 88% of suppliers mentioned the non-existence of associations that gather groups of traders in the market, indicating limited or no platform for collaboration and coordination among traders. The absence of associations hinders collective decision-making, resource-sharing, and advocacy efforts that could benefit the market as a whole.
- Less than 12% of suppliers mentioned the presence of such associations, of whom approximately 90% confirmed their membership in these associations. The primary reasons for joining these associations included the support provided to traders and the role of associations in harmonizing commodity prices. These associations play a significant role in supporting and organizing the trader community, improving the trading environment, enhancing coordination, and establishing connections with relevant stakeholders.

## **Rental Accommodation**

### **Accessibility**

- The majority of surveyed households are IDP returnees (representing 81%), followed by host communities (representing 13%) and internally displaced persons (representing 6%). Gender data is also included, with 34% of surveyed households are female headed households<sup>2</sup>. In addition, the survey includes 180 interviews with (real estate agents) representing 48% and landlords representing 52%, capturing feedback from different groups.
- In Yemen's Northern Governorates, while most households representing 51.5% percent of those interviewed find their housing conditions moderately satisfactory, there is a significant portion representing 25% percent of those interviewed expressing dissatisfaction, indicating the need for improvements in basic service availability and suitability of space inside rented accommodations. Inadequate protection from environmental factors is also a concern.

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<sup>2</sup> Based in the samples provided, we assume that all females in the survey are heads of households (HHs).



- In the Yemen Southern Governorates, community members generally find their housing conditions acceptable, but challenges exist in terms of privacy, space, and the quality of basic services. The positive perception of neighbourhoods compensates for some physical shortcomings. However, targeted interventions are needed to address specific issues, such as the availability of basic services, enough space and privacy for family members.
- Proximity to public services is important, with the majority of tenants living near such services. However, a small fraction faces challenges due to living far away, impacting their quality of life and convenience.
- Regarding official lease contracts, availability is nearly evenly split, with 53% reporting availability and 47% indicating unavailability. Formalizing rental agreements is crucial for tenants' legal protection and stability.

### **Availability**

- According to the survey, only 30% of respondents, including real estate agents and landlords, report that rental housing is readily available and accessible, while 70% indicate its scarcity and difficulty to obtain. This indicates a deeper issue within the housing market.
- A concerning finding is related to the challenges faced by internally displaced persons (IDPs) in accessing rental housing. The primary issue revolves around the apprehension of landlords regarding whether IDPs will fulfill their rent obligations. A vast majority of respondents (representing 89%) acknowledge the unique hurdles faced by IDPs, highlighting the need for attention to address this systemic issue.
- In terms of basic housing facilities, the majority of households have one kitchen (representing 93.7%) and one toilet (representing 80.4%), indicating a common sanitary condition for most residents. One lounge is predominant (representing 82.4%), while a significant fraction of households (representing 14.9%) lacks such lounge. The number of rooms per household varies, with a majority having one or two rooms, suggesting modest living spaces.
- The presence of households without kitchens or lounges indicates challenges related to limited living space and facilities. The number of toilets and rooms reflects the household's socio-economic status, with more facilities likely correlating with higher income or larger families.

### **Affordability**

- Average Expected Rent: The rental prices vary based on the size and location of the property. One-room accommodations have an average expected rent of \$31 in areas far away from services and \$46 for those close to services. The average rent of two-room housing located far away from basic services is about \$52 while those close to services is nearly \$72. Larger rental accommodations with three rooms cost around \$75 when more remote and \$103 when located in towns or nearby locations. The most spacious accommodations with four rooms have higher rental rates of about \$102 when located farther away and around \$136 when close to services.
- Monthly Rent: The majority of surveyed tenants fall within the lower rent ranges. 31% of households pay less than \$39 per month, and another 29% pay between \$40 to \$64 per month. As rent increases, the percentage of households decreases, with only 11% paying between \$80 to \$100 per month. There is a notable 13% of households paying more than \$100 per month for rent.
- Affordability Concerns: The concentration of households in the lower rent ranges raises concerns about the overall affordability of housing and the availability of basic services. It suggests a need for more affordable housing options or reflects a market where the majority of tenants have limited financial means.
- Price Changes: Approximately 35% of respondents reported no change in rental amounts during the past year. Around 32.8% reported a modest increase of less than 10%, while 32.25% reported a significant increase of more than 10%. Looking ahead to the next six months, the majority of respondents anticipate either no change or a slight increase of less than 10% in rental amounts.
- Affordability Issues and Eviction Threats: Survey results indicate significant affordability issues among tenants, with 75% of those surveyed (69% in the Yemen Southern governorates and 81% in the Yemen

Northern governorates.) having unpaid rent accumulations and facing eviction threats. This highlights the need for policy to address rent affordability and prevent evictions.

### **Market policies and constraints for cash interventions**

- **Positive Impact:** The survey data suggests that real estate agents and landlords recognize the potential for cash rent payments to stimulate the economy and provide flexibility for beneficiaries to cover basic needs beyond shelter. Approximately 26.6% of real estate agents acknowledge the positive impact of cash provision in improving the economy, while 50.8% appreciate the benefit of using such assistance to address broader financial challenges.
- **Negative Impact:** While the majority of real estate agents do not perceive negative impacts, there are concerns raised regarding inflation and rising prices associated with cash rent provision. Additionally, some real estate agents express worries about increased reliance on cash for shelter needs and the potential for landlords to raise rents. These concerns are expressed by 15.3%, 21.5%, and 11.9% of agents, respectively.

### **Cash Transfer Services**

- The assessment indicates a strong presence of financial service providers in the region, with 95% of households reporting its availability in their neighbourhoods. Access to financial services is prevalent, indicating a well-developed financial infrastructure in the country. Additionally, the majority of households find it easy to receive cash through these providers, with nearby branches offering convenience and accessibility. Most respondents (representing 92%) prefer receiving financial aid in the form of physical cash over the counter, while a small percentage (representing 8%) are open to receiving cash through mobile teams, showing a willingness to explore alternative distribution methods.

## **Recommendations**

- Utilize cash-based assistance as the preferred modality for providing shelter materials and NFIs, as it allows beneficiaries to have independence and choice.
- Consider engaging contractors when technical skills are lacking in certain areas.
- Develop a materials price matrix to monitor the affordability of items across different regions and assess the impact of inflation on vulnerable populations.
- Address the housing availability constraints faced by IDPs by providing cash assistance to mitigate affordability issues and threats of eviction.
- Implement interventions to improve access to basic facilities, ensure suitable living spaces, and enhance the proximity and quality of services in certain areas.
- Consider cash distribution over the counter as the preferred method, while exploring alternative options for distribution.
- Shelter Cluster to conduct regular assessments to gain a better understanding of the market trend of price changes over time and to validate the accuracy of the prices.

## Map of Assessed Governorates

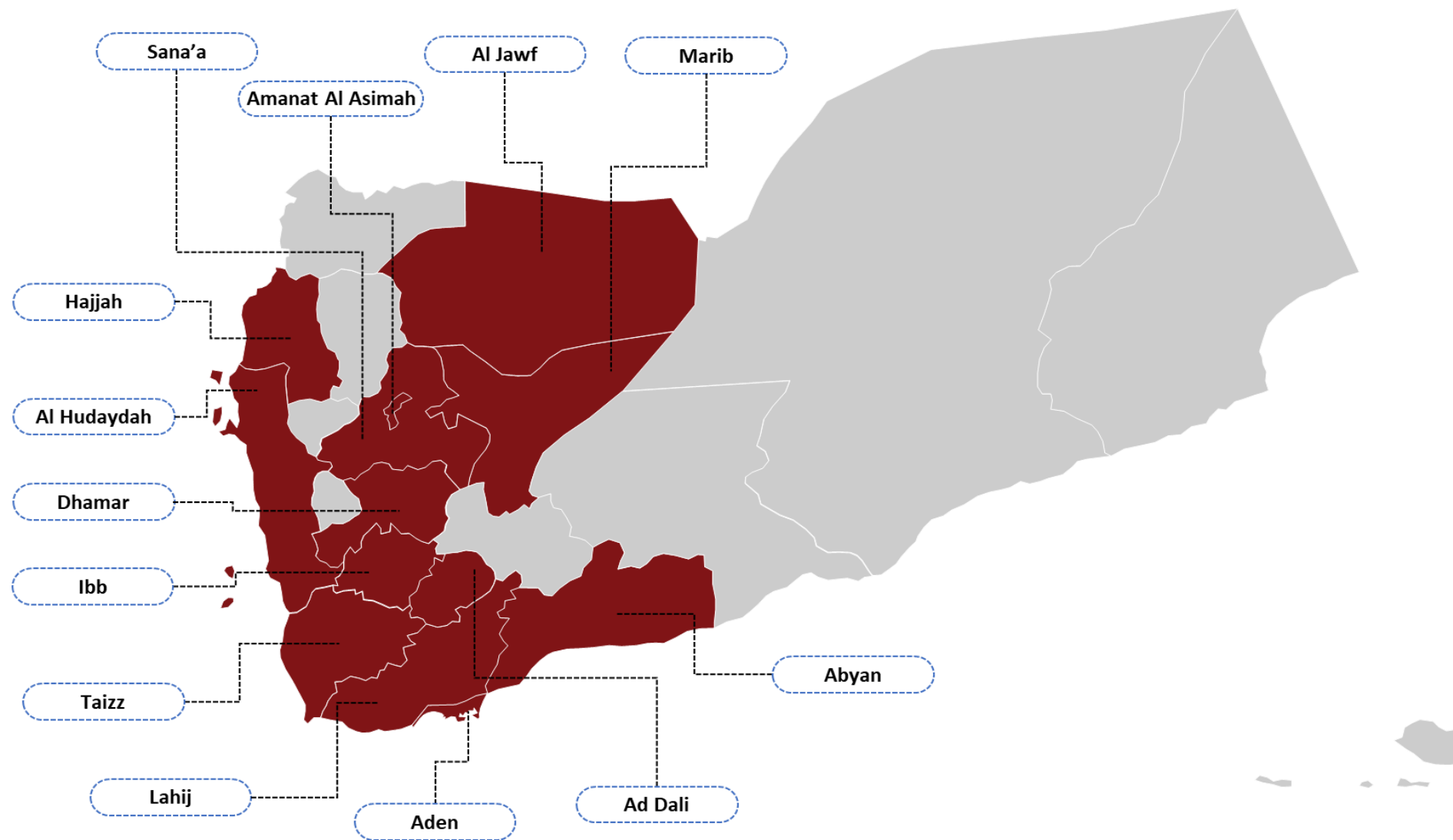


Figure 1: The governorates where the Assessment was carried out





## Introduction

### 1.1 Background

The Shelter Cluster in Yemen is actively working with its partners to address the Shelter and Non-Food Items (NFIs) needs of internally displaced persons, returnees, and vulnerable host community members. In order to effectively respond to these needs, it is crucial to have a comprehensive understanding of the market dynamics, including accessibility, affordability, and availability of Shelter materials, NFIs, and rental accommodation. This information is essential for planning and implementing humanitarian programs in the shelter sector.

Market assessments also play a vital role in informing the design and feasibility of cash-based interventions (CBI) in the shelter sector. By analysing and understanding the markets that influence the sector, humanitarian organizations can make informed decisions about the most suitable forms of assistance. This includes providing cash as part of a package with technical advice or guidance, in-kind assistance, and promoting higher-quality construction practices. Additionally, market assessments help identify materials that may be unavailable in the local market and allow beneficiaries to have the freedom to choose and build shelters that meet their specific needs.

The Yemen Shelter Cluster (YSC) has received funding from donors in the past years, allowing them to assist a substantial number of individuals, including internally displaced persons, returnees, and vulnerable host community members. In 2022, around 274,000 people, have been supported through rental subsidies, highlighting the importance of cash-based interventions in the shelter and NFI sector in Yemen.

Despite lobbying efforts, the inclusion of key emergency shelter items in market monitoring initiatives has not been achieved at the time of initiating this exercise. This poses a challenge for the shelter sector in understanding and engaging with the complex and varied markets that influence their interventions. To address these challenges and improve the effectiveness of interventions, the YSC sought to conduct a comprehensive market assessment for shelter

materials, NFIs, and rental accommodations to facilitate updating its activity matrix, multi-year strategy, and Humanitarian Response Plan (HRP) for 2024.

The market assessment focuses on assessing NFIs and emergency and sustainable shelter solutions prices and inflation across Yemen, particularly considering the rapidly increasing rates of inflation in the country. It also analyzes the cost-efficiency of different transfer modalities and delivery mechanisms, allowing for a comparison. The ultimate goal is to develop a price index that will track fluctuations in the basic prices of rent, shelter materials, and NFIs throughout the year, thereby informing decision-making and response strategies.

To carry out this market assessment, Blumen engaged with key informants such as suppliers, importers, estate agents, contractors, financial institutes, and affected populations (including IDPs, IDP returnees, and Host communities). The assessment was conducted from July to November 2023. The assessments covered thirteen governments which includes 56 districts. Data was collected through interviews, surveys, and other data collection methods. The assessment covered aspects such as accessibility, availability, affordability, and market reform policies that dictate how relevant markets function.

## 1.2 Objective

The assessment aims to facilitate the Yemen Shelter Cluster in planning and implementing informed shelter and NFI responses through evidence-based market assessment of key NFIs, Shelter materials, and rental accommodations.

The sub-objectives of the market assessment are as follows

- Conducting Comprehensive Market Analysis: Assessing the accessibility, availability, costs, and quality of essential NFIs, shelter materials, and rental accommodations in addition to analyzing market capacity, risks, opportunities, and gaps.
- Developing Response Strategies: Formulating evidence-backed strategies and humanitarian response plans to address identified gaps in NFIs, shelter materials, and rental support.
- Adaptability and Innovation: Promoting flexibility and innovation in response strategies to adjust to evolving needs or unforeseen challenges in the shelter and NFI sector.
- Creating Monitoring Mechanisms: Instituting systems to monitor market dynamics, ensuring the adaptability and relevance of ongoing shelter and NFI interventions.





## Methodology

The project was kicked off with a debrief meeting on April 2023, with the Yemen Shelter Cluster and Blumen Consulting team. This meeting introduced the assessment, discussed potential issues/challenges in the implementation, and timeline, and clarified the channel of communications between YSC and Blumen. Blumen carried out a further review of TOR documents and analysis of the content to understand the required deliverables, standards, implementation, and management.

The assessment was conducted from June to November 2023, using a mixed methods approach, encompassing the collection of both quantitative and qualitative data. The quantitative monitoring methods involved conducting an Individual Questionnaire with beneficiaries (including IDPs, IDP returnees, and Host communities). On the other hand, the qualitative monitoring methods encompassed key informant interviews (KIIs) with Real Estate Agents and Suppliers. Beneficiary interviews were conducted in line with humanitarian principles of “do-no-harm” and UNHCR policies and code of conduct.

### 2.1 Desk review

A comprehensive desk review was conducted to shape the design of data collection tools, in-depth market analysis, and a thorough appraisal of the prevailing conditions affecting the most vulnerable communities in Yemen, particularly in the identified target districts. This meticulous review encompassed a range of documents, notably incorporating the Shelter Cluster activity matrix for 2023. The primary aim was to gather insights, understand ongoing efforts, assess market dynamics for essential NFIs, shelter materials, and rental, and evaluate the prevailing circumstances affecting vulnerable populations. This comprehensive approach served as a foundational step to ensure the effectiveness and precision of subsequent interventions tailored to identify the specific needs identified during this assessment.



## 2.2 Data Collection and Sampling

A collaborative and inclusive methodology was adopted, emphasizing active engagement with the Shelter Cluster team throughout every phase of the assessment process. The Shelter Cluster team played a pivotal role in crafting the assessment framework and developing the requisite tools, drawing from comprehensive consultations and collective insights. Data collection tools developed include individual survey questionnaires (IDPs, IDP returnees, and Host communities) and key informant interviews (Real estate agents, landlords, and suppliers). Their active involvement ensured that the assessment framework resonated with the context and encompassed relevant parameters crucial for accurate data collection.

Once the assessment framework and tools were established, the fieldwork for primary data collection was initiated by the team at Blumen. This phase commenced subsequent to securing the relevant authorities' approval of the developed tools. This careful approach, involving collaboration, consultation, and proper authorization, laid a robust foundation for the meticulous and credible collection of on-ground data.

Table 1: Sample Size

Humanitarian Hub	Governorate	District	Code	Type	# of interviews		
					Individual's	Suppliers	Real estate agents/ landlords
Aden Hub	Marib	Marib City	YE2612	Urban	226	55	11
Aden Hub	Marib	Harib	YE2609	Rural	1	0	0
Aden Hub	Abyan	Khanfir	YE1211	Rural	229	33	3
Aden Hub	Abyan	Zingibar	YE1210	Urban	141	18	0
Aden Hub	Marib	Marib	YE2613	Rural	184	33	3
Aden Hub	Al Dhale'e	Qa'atabah	YE3003	Rural	166	29	3
Aden Hub	Aden	Ash Shaikh Outhman	YE2402	Urban	87	28	0
Aden Hub	Al Dhale'e	Ad Dhale'e	YE3006	Urban	114	26	9
Aden Hub	Lahj	Tuban	YE2515	Rural	123	26	3
Aden Hub	Lahj	Al Hawtah	YE2514	Urban	16	4	0
Aden Hub	Aden	Dar Sad	YE2401	Urban	289	31	7
Aden Hub	Aden	Al Buraiqeh	YE2404	Urban	138	26	2
Aden Hub	Aden	Craiter	YE2407	Urban	0	22	0
Aden Hub	Al Hudaydah	Al Khawkhah	YE1820	Rural	399	28	4
Aden Hub	Taizz	As Silw	YE1513	Rural	139	27	3
Aden Hub	Aden	Attawahi	YE2405	Urban	0	11	9
Aden Hub	Taizz	Salh	YE1519	Urban	157	31	9
Aden Hub	Taizz	Al Mudhaffar	YE1517	Urban	120	31	9
Aden Hub	Aden	Al Mansura	YE2403	Urban	0	16	0
Aden Hub	Taizz	Al Ma'afer	YE1521	Rural	135	31	3
Aden Hub	Taizz	Jabal Habashy	YE1508	Rural	153	28	3
Aden Hub	Taizz	Al Mukha	YE 1505	Rural	142	0	0
Aden Hub	Taizz	Al Qahirah	YE1518	Urban	149	14	0
Aden Hub	Al Hudaydah	At Tuhayat	YE1826	Rural	63	29	2
Aden Hub	Abyan	Lawdar	YE1204	Rural	81	23	3
Aden Hub	Aden	Khur Maksar	YE2408	Urban	126	31	0

Aden Hub	Al Hudaydah	Hays	YE1819	Rural	89	30	3
Aden Hub	Al Hudaydah	Al Garrahi	YE1825	Rural	4	0	0
Aden Hub	Marib	Sirwah	YE2606	Rural	32	0	0
Aden Hub	Aden	Al Mualla	YE2406	Urban	53	28	0
Aden Hub	Al Hudaydah	Ad Durayhimi	YE1814	Rural	2	0	0
Al Hudaydah Hub	Al Hudaydah	Bajil	YE1810	Rural	23	31	3
Al Hudaydah Hub	Al Hudaydah	Al Hali	YE1823	Urban	160	30	0
Al Hudaydah Hub	Al Hudaydah	Al Hawak	YE1821	Urban	148	34	0
Al Hudaydah Hub	Al Hudaydah	Al Mina	YE1822	Urban	137	30	0
Al Hudaydah Hub	Al Hudaydah	Jabal Ra's	YE1818	Rural	59	30	3
Al Hudaydah Hub	Al Hudaydah	Az Zuhrah	YE1801	Rural	118	30	3
Al Hudaydah Hub	Al Hudaydah	Bayt Al Faqiah	YE1817	Rural	111	31	3
Al Hudaydah Hub	Hajjah	Abs	YE1704	Rural	140	32	3
Ibb Hub	Ibb	Al Dhihar	YE1119	Urban	156	30	9
Ibb Hub	Ibb	Al Makhadir	YE1107	Rural	1	0	0
Ibb Hub	Ibb	Yarim	YE1102	Rural	108	30	3
Ibb Hub	Ibb	As Saddah	YE1106	Rural	1	0	0
Ibb Hub	Taizz	Maqbanah	YE1504	Rural	149	27	3
Ibb Hub	Taizz	At Ta'iziyah	YE1520	Rural	153	29	3
Ibb Hub	Ibb	Al Mashannah	YE1118	Rural	155	31	3
Ibb Hub	Al Dhale'e	Damt	YE3002	Rural	141	30	3
Sa'adah Hub	Al Jawf	Bart Al Anan	YE1610	Rural	59	31	4
Sa'adah Hub	Al Jawf	Al Maton	YE1606	Rural	209	30	3
Sa'adah Hub	Al Jawf	Al Maslub	YE1607	Rural	150	30	3
Sana'a Hub	Amanat Al Asimah	Al Wahdah	YE1306	Urban	146	30	0
Sana'a Hub	Amanat Al Asimah	As Sabain	YE1305	Urban	174	38	9
Sana'a Hub	Amanat Al Asimah	At Tahrir	YE1307	Urban	151	22	0
Sana'a Hub	Amanat Al Asimah	Ath'thaorah	YE1309	Urban	145	30	0
Sana'a Hub	Amanat Al Asimah	Az'zal	YE1303	Urban	143	31	0
Sana'a Hub	Amanat Al Asimah	Assafi'yah	YE1304	Urban	106	30	0
Sana'a Hub	Amanat Al Asimah	Old City	YE1301	Urban	95	30	0
Sana'a Hub	Amanat Al Asimah	Bani Al Harith	YE1310	Urban	150	30	9
Sana'a Hub	Amanat Al Asimah	Ma'ain	YE1308	Urban	158	30	9
Sana'a Hub	Amanat Al Asimah	Shu'aub	YE1302	Urban	141	32	9
Sana'a Hub	Sana'a	Sanaa City Outskirts - Sanhan wa Bani Bahlul		Rural	36	0	0
Sana'a Hub	Sana'a	Hamdan	YE2301	Rural	135	30	3
Sana'a Hub	Sana'a	Sanhan	YE2305	Rural	104	30	3
Sana'a Hub	Dhamar	Dhamar City	YE2008	Urban	140	30	9

<b>Grand total</b>	<b>7560</b>	<b>1598</b>	<b>180</b>
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### **Individual survey (IDPs, IDP returnees, and Host communities)**

A structured questionnaire was used to collect quantitative data, including the modality individuals prefer to receive shelter or rehabilitation support, assess their access to the markets, basic housing data, status of rental payment, any protection issues such as eviction threats, suitability of housing and evaluation of their accommodation and the availability of cash transfer services in the region. The assessment was implemented in 13 governorates across the country; the sample size of the total questionnaire respondents was 7,560. The sample <sup>3</sup>size per district was determined based on the beneficiaries' locations (urban/rural, those assisted in Yemen's Northern and Southern Governorates).

Sampling for the quantitative data collection (individual interviews) was conducted through random sampling in the targeted governorates. Beneficiary lists of those assisted with cash for rent and house rehabilitation were shared by the Shelter Cluster. Random sampling method ensured a well-diversified sampling in terms of gender, age, diversity including (IDPs, IDP returnees, and host communities), educational background, occupation, social status as well as locations (both urban/rural in Yemen Northern, and Southern Governorates).

### **Key Informant Interviews (KIIs)**

Key informant interviews were conducted with selected suppliers, importers, real estate agents, trade fairs, landlords, and contractors to gather the needed information. In this modality, 1,598 key informant interviews were conducted with Suppliers/ Retailers to assess the different shelter materials and NFI materials in terms of (cost, availability in market and demand), market chain, and capacity. Additionally, 180 key informant interviews were conducted with Real Estate Agents and landlords to assess the average rental prices in the targeted areas, housing conditions and suitability, and potential positive and negative impacts. Sampling for the qualitative data collection (Real Estate Agent KII and Supplier KII) was purposive sampling in the selected geographical areas and targeted real estate agents, landlords, wholesalers, and retailers.

## **2.3 Data Management, Analysis and Interpretation**

The data collection tools were programmed into a mobile data collection system and installed in Blumen's own developed system "HatSys". The quantitative and qualitative data from primary and secondary sources were assessed and referenced, ensuring the robustness of the findings through systematic triangulation. The data analysis used triangulated data sources to ensure that a single data source was not relied upon. The tools used for data collection were reviewed during training and adapted to the context before being deployed to the field.

Qualitative data was evaluated using thematic content analysis, and when applicable, data was quantified from various primary sources. Descriptive statistics were utilized to summarize and describe key characteristics of the quantitative data obtained from both primary and secondary sources. These descriptive statistics were presented in the form of charts and graphs, accompanied by narrative in this report.

## **2.4 Data Quality Assurance**

Blumen used HAT system for data collection, ensuring high-quality, and reliability throughout the process while confidentiality of data collected. Data collection processes (interviews and KIIs) were conducted by highly trained and experienced field researchers. Close monitoring and support were provided to ensure that interviews were conducted

<sup>3</sup> The sample were 50% applicable to urban areas and 50% applicable to rural areas..



in a professional manner and that valid and reliable data was collected. The consultants represented by the Team Lead, held the overall responsibility for completing the fieldwork for all defined monitoring processes, as well as the data analysis and the completion of the report. The Technical Advisor (Qualitative and Quantitative Data Analyst) supported the team leader in developing tools and methodologies, assisting in training field researchers, sample verification management and sample design, SPSS/STATA file development, and descriptive analysis. They ensured that the assessment produced accurate and valid findings by articulating in detail the purpose and methods of the assessment; employing systematic procedures to analyse data using triangulated data sources; applying both quantitative and qualitative data during analysis and synthesis; and producing an impartial report containing findings, conclusions and recommendations that are evidence-based.

## **2.5 Ethical Considerations:**

Participants were informed of the objective of the assessment, emphasizing that their participation is voluntary and that they can withdraw at any time with no penalty and no consequences if they decide not to participate. KIIs and other interviews were conducted in line with humanitarian principles of “do-no-harm” and UNHCR policies and code of conduct.

## **2.6 Data Confidentiality:**

Data confidentiality is a priority for Blumen Consulting and one of its main values. Only Blumen Consulting staff who are involved directly in the project (data collection and data analysis) have access to data. The interviews were assured of data confidentiality. All data collected remain the property of UNHCR.

# **3. Challenges and Limitations**

## **3.1 Challenges**

### **For the Individual survey:**

- Beneficiaries of CBI and Shelter interventions are dispersed across different and distant locations, resulting in increased time and effort for field researchers to reach them.
- The large size of displacement sites in the targeted districts poses a challenge in finding the selected interviewees.
- Weak and intermittent network coverage in many areas makes it challenging to communicate with field researchers and reach beneficiaries who are located in areas with no network coverage.

### **For the Suppliers interview:**

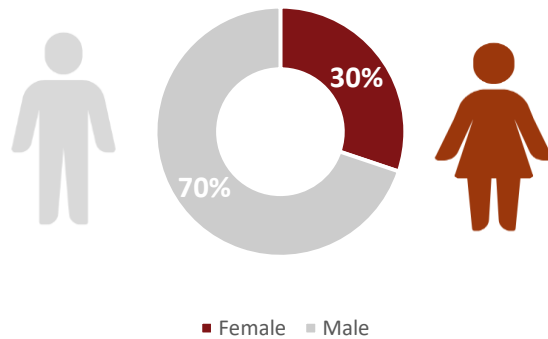
- The existence of the exact materials specification with different qualities, types, and forms, results in significant price variations.
- Price disparities among suppliers and traders in the same districts, sometimes due to the type of item available with the trader.
- Unavailability of relevant suppliers in some districts and provinces.
- Some suppliers and traders refuse to participate in interviews or provide information about material prices, either due to their lack of availability or for unknown reasons.
- Some markets serve multiple districts.

## **1.2 Limitations**

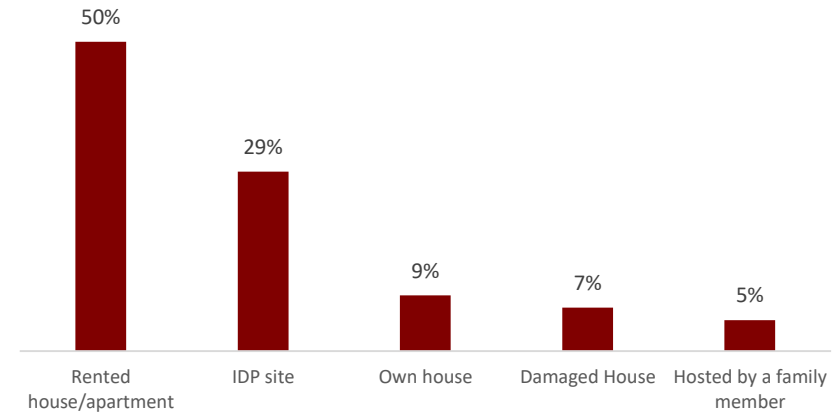
- The modifications made by authorities to the data collection tools in the Yemen Northern Governorates hindered capturing responses to almost half of the questionnaires, while the full questionnaires were endorsed in the Yemen Southern Governorates.
- The provided number of samples had a higher representation of IDP returnees and did not balance samples for the different shelter typologies including those in rented accommodation..
- The entire assessment was only conducted once, resulting in limited insight into the trend of price changes over time and limited validation of the prices.

# Demographic

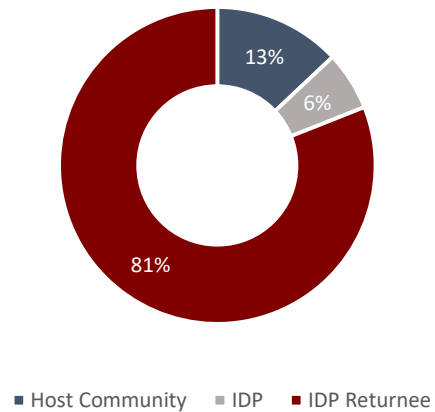
## BNFs Respondents Gender



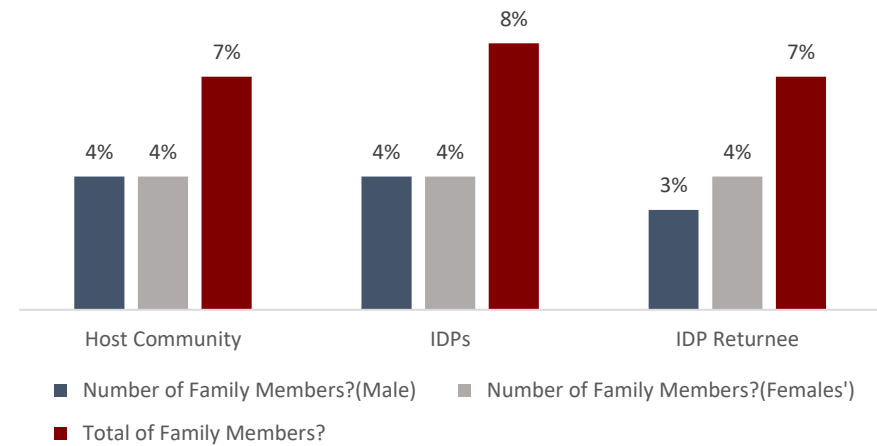
## Accommodation



## BNFs Respondents Type



## Average number of family members





## Findings

### 4.1 Shelter Materials and Non-Food Items

This section presents suppliers' feedback and the types of materials they supply. It also examines how and from where these material types are bought, and what alternative sources exist for these types of materials. Additionally, it assesses the capacity of the market and suppliers by ensuring sufficient stock of materials. The assessment includes evaluating whether suppliers have adequate warehouses to store this stock, as well as assessing the prices of these types of materials provided by the supplier, and the supplier's ability to compete in the market.

Based on the classification of Shelter materials and NFIs, Figure 2 demonstrates that the most frequently supplied materials are bedding, kitchen/housing materials, clothes, and rehabilitation materials. Similarly, shelter items such as tents, housing covers and insulation materials, and emergency shelters are also frequently supplied.



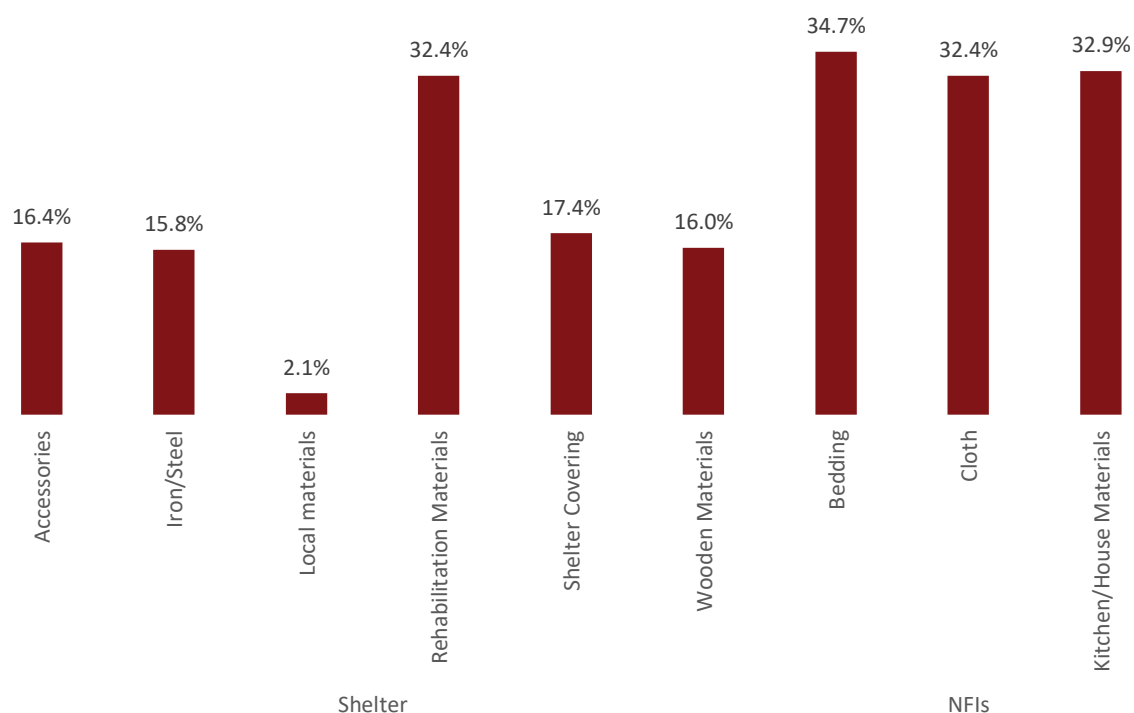


Figure 2: Categorical overview of items offered by Interviewed Suppliers during Market Assessment

### 4.1.1 Accessibility

This sub-section presents the possibility of access to shelter materials and NFIs in local markets and research on the demand side. It involves assessing the quantity of shelter/NFIs products required in a specific location. Furthermore, it evaluates the geographic accessibility of shelter materials and NFIs options, taking into consideration factors such as transportation infrastructure (road topography), means of transportation, time, and fees that enable or restrict access. Additionally, it considers the population density in the market.

The assessment collected information through interviews and surveys conducted with key informants, including beneficiaries and suppliers.

Regarding Legal and Administrative access, the assessment revealed a positive trend with the majority of the suppliers having all the required legal documents as shown in the following figure (4).

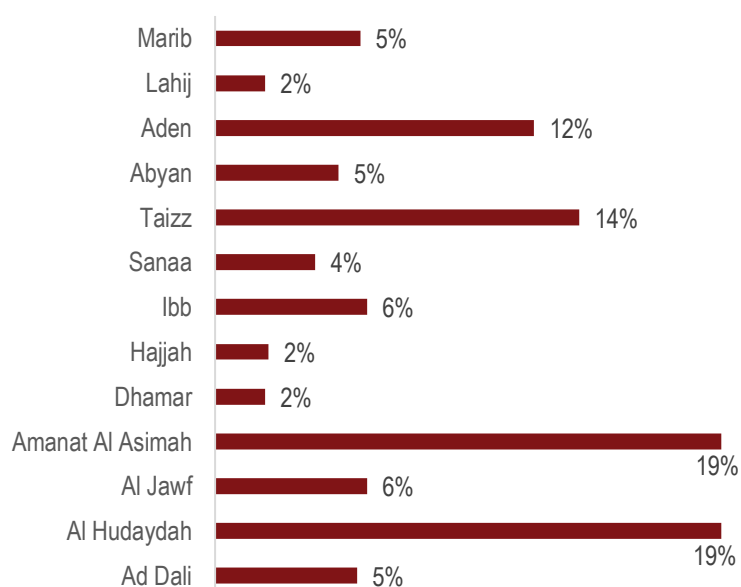


Figure 3: Geographic distribution of the interviewed suppliers in Market Assessment

That means suppliers demonstrate a strong commitment to legal compliance and operate within the framework of applicable laws and regulations. This contributes to a more reliable and accountable market environment for shelter materials and NFIs, ultimately supporting effective humanitarian response and assistance in the context of Yemen.

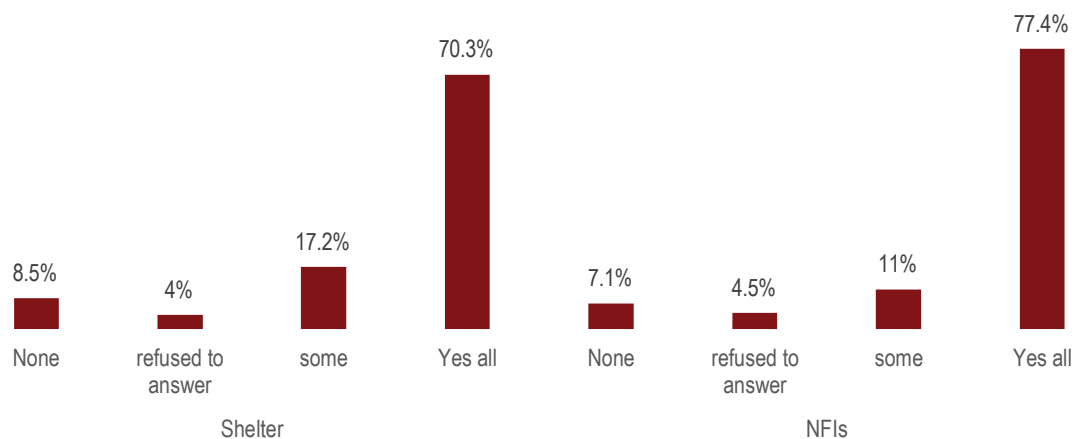


Figure 4: Availability of Supplier's Legal Documents

For the distance, time and how far the market from the interviewed households, as shown in the figures (5,6 & 7). It was found that the average distance is 2-4 km far and takes around 15 minutes to reach the market. The findings emphasized that the Yemen Southern Governorates<sup>4</sup> has good road conditions, which contributes to ease access to local markets.

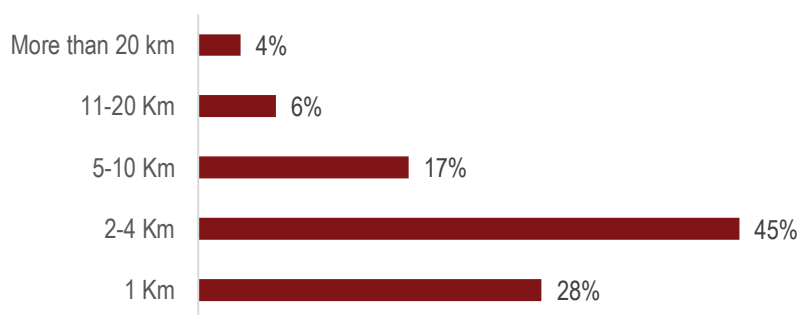


Figure 5: How far is the market from you?

<sup>4</sup> The interviewed households were located in southern areas, specifically in Aden, Abyan, Taizz, Marib, Lahij, Al Hudaydah, and Ad Dali. Furthermore, it is important to note that the majority of the targeted districts were urban areas

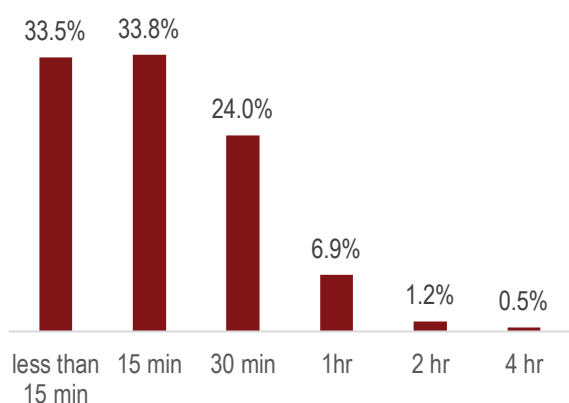


Figure 6: How much time does it take you to reach the local market?

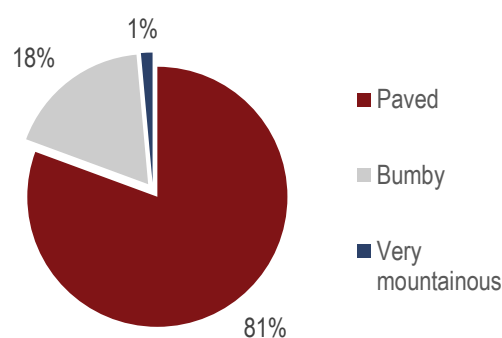


Figure 7: How is the road to the market? -Yemen Southern Governorates

The findings from Figure (8) indicate that the targeted markets in Yemen have a large catchment area accessible to them. The estimated and average number of populations in the surrounding villages that can reach these markets by different transportation means, such as cars and buses, is significant and varies between different markets. This suggests that the markets have the capacity to meet the urgent demands of the affected population. The ability of these markets to cover large population densities highlights their importance in providing access to shelter materials, NFIs, and rental options for the affected communities in Yemen. Overall, the findings emphasize the potential of the targeted markets to cater to the large demand and meet the urgent needs of the affected population.

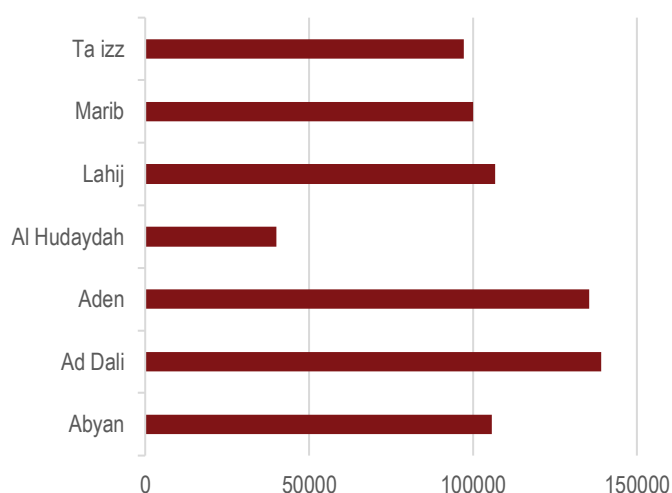


Figure 8: Estimated population of the surrounding villages that have access to the market – Yemen Southern Governorates

### 4.1.2 Availability

This sub-section provides a comprehensive overview of the factors influencing the availability of shelter materials and NFIs in Yemen. It highlights the significance of supplier capacity, local production capacity, supply chain considerations, and market trends. It highlights the need to evaluate the availability, capabilities, and reliability of suppliers within the country, including local suppliers, manufacturers, wholesalers, and distributors. Assessing the availability of key products and commodities, along with the ability of suppliers to meet delivery timelines and maintain stock levels, is crucial. By conducting a comprehensive assessment, potential supply shortages or gaps can be identified, enabling

effective strategies and interventions to address the needs of the affected population. These factors collectively contribute to the overall availability of shelter materials and confirmed by this assessment.

### Market Supply Chain

Assessing the market chain involves analysing the various stages and actors involved in the production, distribution, and consumption of materials or services within local markets.

Wholesalers<sup>5</sup> function as intermediaries connecting producers and retailers, facilitating the distribution process. On the other hand, retailers directly engage with and serve end users, establishing a direct connection to meet their needs and preferences. s, whereas retailers<sup>6</sup> interact with and cater to end users directly. In Figure (9), 75.5% of suppliers reported purchasing materials at retail, with 71.45% procuring them in large quantities through wholesale channels. Conversely, 28.55% of suppliers do not utilize wholesale purchases, while 24.5% refrain from retail transactions.

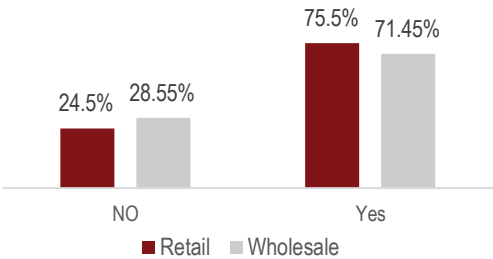


Figure 9: How to buy the materials that can be supplied

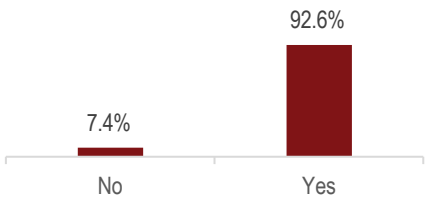


Figure 10: Availability of other suppliers selling the same type of materials in the local market

affordable supply of shelter materials and NFIs for the affected population in Yemen.

As shown in figure (10), the majority of the markets have multiple suppliers selling the same type of shelter materials and NFIs highlighting the availability of alternative options for beneficiaries. This not only ensures a more competitive market but also indicates the availability of the items, provides flexibility, price balance, and reduced dependence on a single supplier. Humanitarian actors need to leverage this finding and work with multiple suppliers to ensure a steady and

When asking suppliers where they normally buy the key commodities, it was found that 33.5% of suppliers typically purchase them from the first importer supplier at the country level. Additionally, 29.75% procure these commodities directly from the main producer, while 27.7% rely on the first importer supplier at the governorate level. Although the proportions from local craftsmen and smaller suppliers are relatively smaller. That means many essential materials are sourced from local suppliers within the country including at the governorate level, please refer to the following (Figure 11) for more details.

<sup>5</sup> Wholesale refers to the sale of large quantities of goods to businesses

<sup>6</sup> Retail refers to the sale of smaller amounts of goods directly to individual consumers



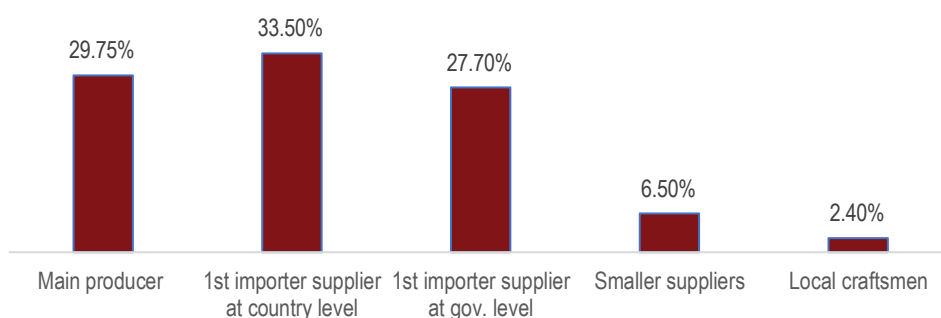


Figure 11: From where do you normally buy the key commodities

As shown in Figure (12), the suppliers reported alternative sources for materials purchase, including the 1st importer supplier at the country level 33.4% and, the 1st importer supplier at the governorate 31.8%. level, smaller suppliers 28.6%, the Main producer is 18.9%, while a small percentage of 8.1% is Local craftsmen.

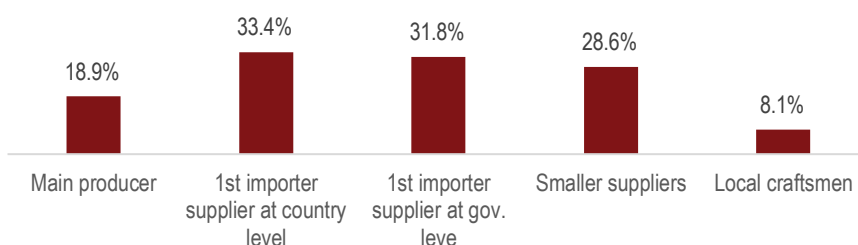


Figure 12: The alternative source of commodities

## Market Capacity

Figure (13) shows that the majority of suppliers have warehouses, representing 79%, while 21% of them do not have any. Also, 90.6% of suppliers have a stock of materials which means that the suppliers have warehouses to maintain storage space to store their inventory or stock products before selling them to customers and enable suppliers to fulfil customer orders quickly and efficiently.

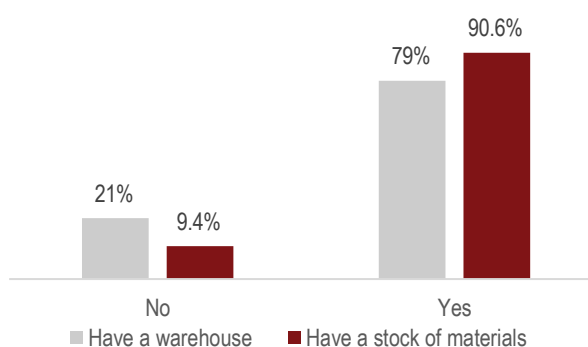


Figure 13: Have a warehouse and/or a stock of materials

The average capacity of a warehouse for storing Non-Food Items (NFIs), shelter materials, and building materials varies based on the size and weight of the items. According to Figure (14), the average warehouse capacity for shelter materials is 3043.4 square meters, while the average warehouse capacity for NFIs is 408 square meters. Building materials, such as bricks, cement, steel, lumber, and roofing materials, require more space compared to NFIs. This finding emphasizes the positive trend in the availability of warehouse storage capacity that reflects the ability for the suppliers to store large quantities that meet the demand. Furthermore, in humanitarian or emergency situations, warehouse capacity for NFIs, shelter items, and building materials may be subject to specific restrictions, standards, and logistical considerations established by relevant organizations and agencies.

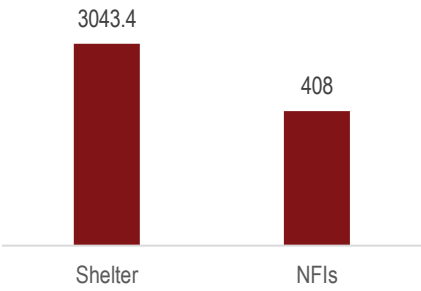


Figure 14: Average of capacity of warehouse according to classification of items

As shown in Figure (15), the suppliers indicated that the available materials meet the demand of 94.1% of shelter materials requirements and 93.2% of NFIs. It means that there is an equilibrium between the supply of materials or commodities and the demand for those materials from consumers or businesses. This balance is important for several reasons such as price stability, and market efficiency. Also, this indicates that the challenges faced by suppliers if the available materials do not meet demand are almost non-existent.

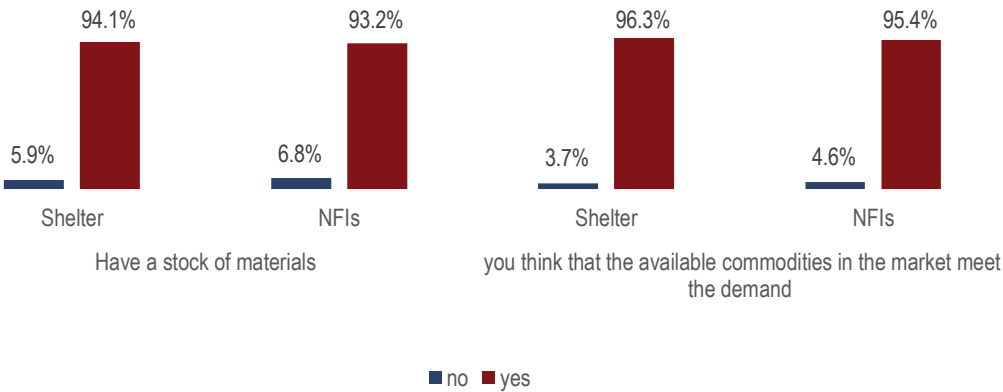
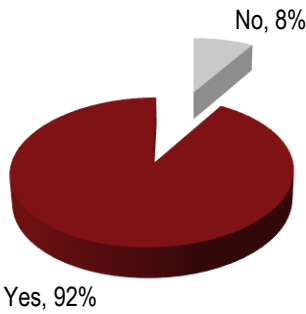


Figure 15: Stock Availability



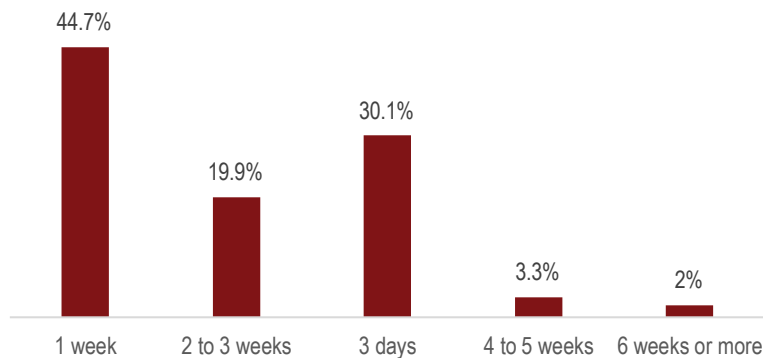
In case there is an urgent big demand which affect the available stock, are you able to replace the sold quantity easily

91.6% of suppliers confirmed that they are able to replace the sold quantity easily in

case there is an urgent big demand that affects the available stock. This ensures that they have the capability and resources to replenish or restock the quantity of goods that have been sold or purchased by customers without significant difficulty or delay. In other words, they can quickly and efficiently replenish their inventory to meet ongoing demand (Figure 16).

*Figure 16: Replacing the sold quantity easily*

Based on Figure (17), the majority of suppliers (representing 44.7%) indicated that it takes approximately one week for them to restock their inventory. Additionally, 30.1% of suppliers confirmed a restocking timeframe of three days, while 19.9% stated that it would take them two to three weeks to replenish their supplies. Understanding these restocking timeframes is critical for effective supply chain management. It helps organizations plan their procurement and ordering schedules to ensure a continuous availability of shelter materials. By considering these findings, stakeholders can mitigate potential delays or shortages in the market and maintain a well-functioning supply chain.



*Figure 17: Time will take to restock?*

In Figure (18), the findings regarding restocking frequency among suppliers indicate their capacity and availability of materials. The majority of suppliers (representing 45%) conduct a monthly restocking schedule, emphasizing the importance of maintaining a consistent supply of shelter materials. Additionally, a significant proportion of suppliers (representing 39%) restock on a bi-monthly basis, suggesting a moderate restocking frequency. A smaller percentage of suppliers (representing 11%) showed a quarterly frequent for restocking, while a minority (4%) mentioned restocking every six months. Only a small percentage (1%) of suppliers reported restocking on a yearly basis. These results highlight the varying approaches to restocking among suppliers in the market and their capacity to meet the market demand in a timely manner. Organizations involved in procurement and planning can consider these preferences to align their restocking strategies, ensuring a timely and uninterrupted supply of shelter materials and NFIs.

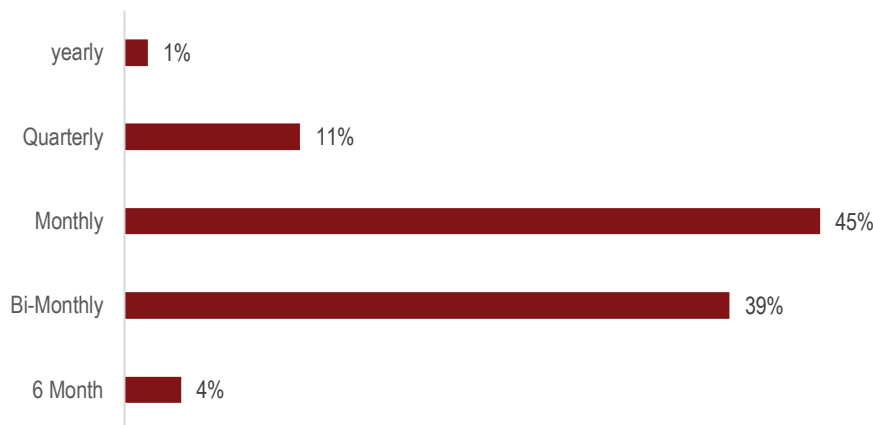


Figure 18: How often do you restock

As shown in figure (19), the majority of households responded affirmatively when asked if they believed that shelter, rehabilitation materials, and NFIs are available in the nearby markets. This finding aligns with the earlier analysis, confirming the accessibility and availability of materials in local markets. The respondents' perception that such materials are indeed accessible further supports the preference for cash modalities for shelter assistance to carry out the construction or repairs. It reinforces the notion that utilizing local markets for materials is a viable option in implementing future shelter and rehabilitation programs.

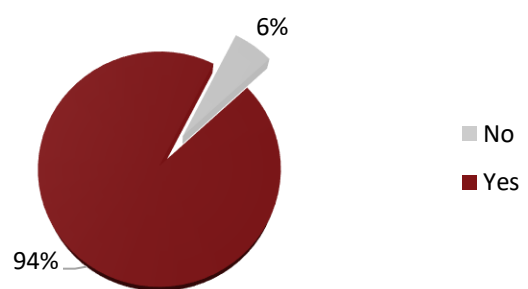


Figure 19: BNFs Opinion about availability of materials in nearby markets

### 4.1.3 Affordability

This section of the market assessment report focuses on evaluating the affordability of shelter materials and non-food items in Yemen's market and people's preference for the modality of implementation. It examines factors such as pricing dynamics, cost considerations, and challenges faced by suppliers and consumers. The section analyses average market prices for at least three quotations per district, external factors impacting affordability, and the purchasing power of stakeholders. The findings provide insights to inform strategies and interventions for improving affordability, ensuring access to shelter materials, and promoting sustainable solutions in Yemen. Addressing affordability concerns can contribute to enhancing shelter conditions in the country.



## Modality Preference- Shelter Materials

Surveyed Households were asked about their preferred modality for receiving shelter assistance. The majority (representing 55.3%) selected cash as their preferred option, allowing them to purchase materials themselves in the local markets. The second most popular choice was to have a contractor hired to complete the entire construction work, which was chosen by 22.75% of respondents. This was considered a more convenient option to avoid the need to carry out repairs physically. Similarly providing in-kind materials as part of their shelter assistance was the preferred modality at 22.45%, while they can carry out the physical work.

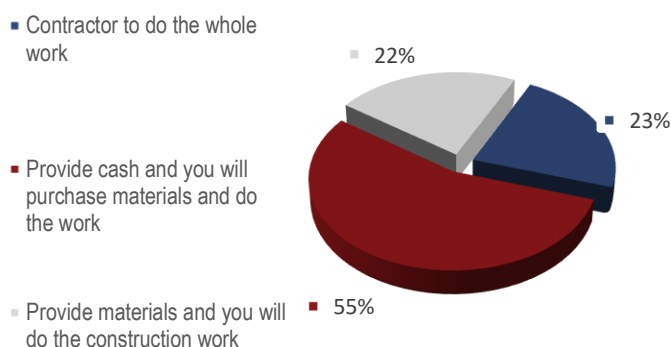


Figure 20: Modality Preference-Shelter Materials

For respondents who preferred their shelter assistance to be provided by a contractor, their reasons were further explored. Approximately 43% stated that their preference was due to the inability of all family members to carry out the necessary construction or repairs, highlighting physical limitations or lack of expertise. About 39% cited a lack of skilled labour within their households, indicating a need for external expertise. Only 18% mentioned difficulty in acquiring materials, suggesting limited availability or accessibility. These reasons underscore the practical limitations faced by respondents in independently completing shelter-related work and highlight the importance of contractors who can provide skills, expertise, and streamline the construction process.

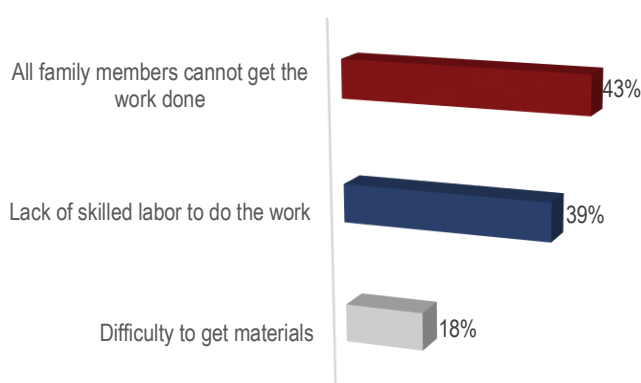


Figure 21: The reason for contractor modality selection

The preference for cash modality over in-kind assistance highlights the availability of local construction material in local markets and reflects the beneficiaries' desire for independence, dignity, and choice associated with receiving cash. However, it is worth noting that a significant portion of respondents still recognized the value of contracting the labour aspects of repairs, indicating the importance of professional expertise. Based on the results, future shelter programs should primarily focus on cash-based modalities in alignment with SPHERE standards. However, for more complex repairs or vulnerable groups lacking labour support, incorporating some in-kind support along with technical guidance may still be necessary.

## Modality Preference- NFIs

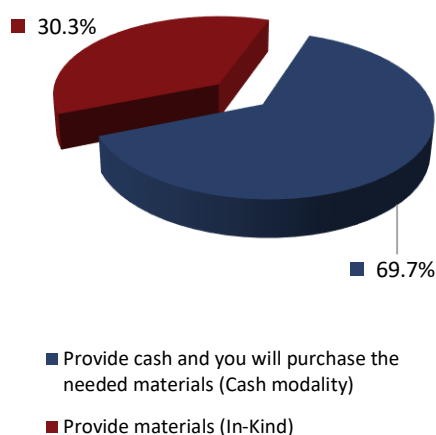


Figure 22: Modality Preference-NFIs

Surveyed Households were asked about their preferred modality for receiving NFIs. The majority (69.7%) selected cash as their preferred option, allowing them to purchase materials themselves in the local markets. The remaining 30.3% prefer providing the assistance in kind.

For respondents who preferred their shelter assistance to be provided in kind, their reasons were further explored. Approximately 35% stated that their preference was due to the amount given to them used to cover other family needs. About 25% cited the amount may not be sufficient. About 17% mentioned the assistance will be delivered to their places. With around 11% mentioned that the provided in kind have better quality than those available in the nearest market.

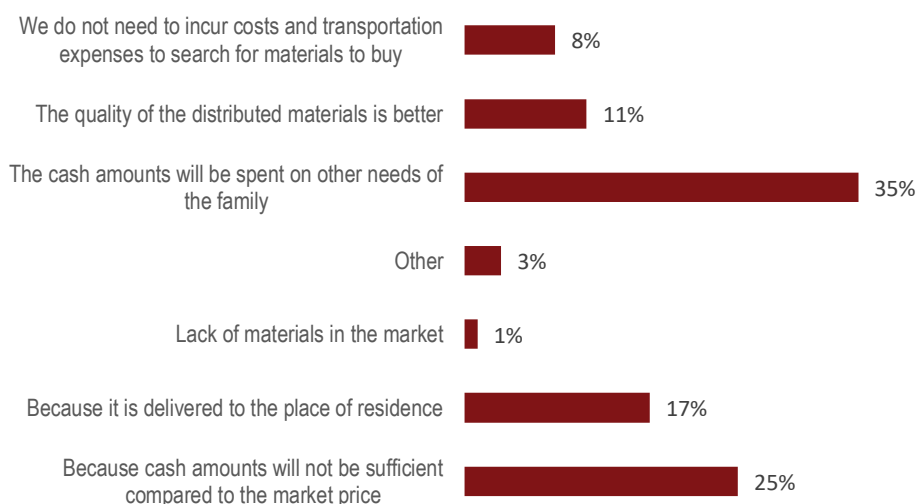


Figure 23: The reason for in kind selection

## Price Inflation

The responses obtained from suppliers offer some insights into their perceptions and expectations regarding price changes in the market. According to Figure 24, approximately 43.7% of the suppliers surveyed anticipated an increase in the cost of shelter items. This suggests that a significant portion of suppliers expect increased prices for materials or services related to shelter, such as construction materials or rental costs. Similarly, about 49.9% of the suppliers expect an increase in the NFI costs. NFIs may include essential household items like blankets, clothing, and cooking utensils. The anticipation of cost increases among suppliers indicates the expectation of higher prices for these items in the market. These findings highlight the potential challenges faced in terms of affordability and availability of shelter items and NFIs. Rising costs can impact the overall accessibility of these essential goods, potentially affecting individuals and households in need. It also suggests the need for monitoring and establishing proactive measures to mitigate the impact of cost increases on vulnerable populations.

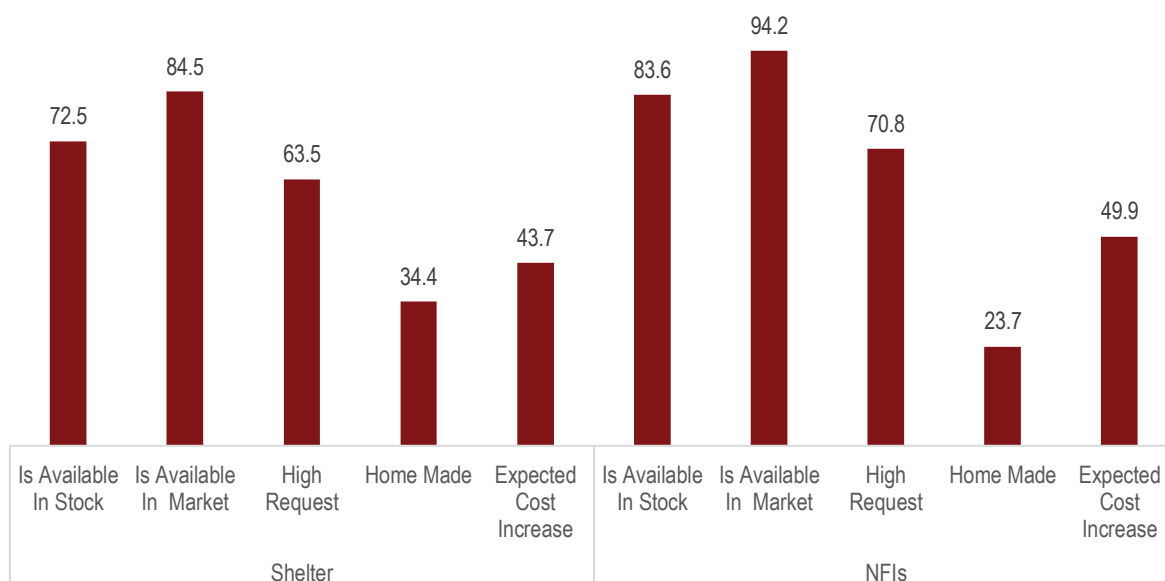


Figure 24: Expectation for price increase – Yemen Sourther Governorates

#### 4.1.4 Market policies and constraints

The section highlights the importance of identifying and analysing market policies and government regulations. The assessment aims to evaluate how these policies either support or hinder the functioning of the markets and the provision of adequate shelter or NFI solutions. Additionally, the assessment examines the market constraints that affect the supply and demand of shelter and NFI products. These constraints may include limited access to construction materials.

The responses from suppliers are summarized in Figure 24. A majority of suppliers, approximately 74%, reported the absence of any market regulations. This finding suggests that the market operates without formal oversight or control, indicating an unstable market environment. The lack of regulations and management can result in challenges related to market stability, fair competition, and consumer protection.



Figure 25: Market Policies- Yemen Southern Governorates

Furthermore, when asked about the existence of associations that gather groups of traders in the market, around 88% of the suppliers mentioned that no such associations exist. This implies that there is a limited or non-existent platform for collaboration and coordination among traders in the market. The absence of associations can hinder collective decision-making, resource-sharing, and advocacy efforts that could benefit the market as a whole.

For the suppliers who mentioned the presence of associations, they were further asked about their association membership. Remarkably, about 90% of them confirmed that they were part of these associations. When asked about their reasons for joining, the responses varied.

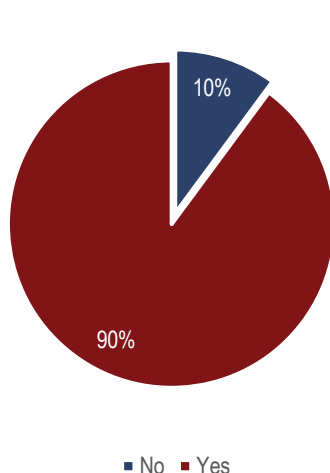


Figure 26: Are you part of this association?

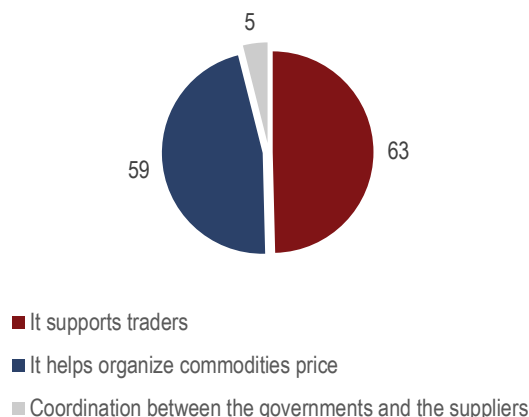


Figure 27 : Why did you join this association?

The most frequently selected reason for 63 suppliers was that the association supports traders. Additionally, 59 suppliers mentioned that the association helps organize commodity prices. Only a small number, 5 suppliers, selected "others." When asked to specify, their response indicated that the association serves as a platform to coordinate and establish links between the government and traders. That indicates that these associations play a significant role in supporting and organizing the trader community. Their efforts contribute to improving the trading environment, enhancing coordination, and establishing connections with relevant stakeholders, ultimately benefiting both the traders and the overall market ecosystem.

As common knowledge, market regulation and management are primarily carried out by the Trade Ministry, which enforces regulations, ensures fair competition, and protects consumers. The private sector, represented by the Yemen Association for Consumer Protection, also contributes to market stability and price control by safeguarding consumer rights and promoting fair practices. These efforts address market constraints, such as limited resources and affordability challenges, affecting the supply and demand of shelter materials and NFI products.

## 4.2 Rental Accommodations

This section aims to provide a comprehensive understanding of the rental accommodations market. The rental market assessment can inform Shelter Cluster rental program decision-making, program design, addressing the housing needs of the affected population effectively. The analysis of the Rental Accommodations section combines data collected from two tools: individual surveys (IDPs, IDP returnees, and Host Communities) and real estate agents' interviews. This approach allows for a comprehensive assessment of various aspects related to rental



accommodations. The section consists of four sub-sections: Accessibility, Availability, Affordability, and Market Policies and Constraints.

## 4.2.1 Accessibility

This sub-section focuses on the access to rental accommodations in the country. It examines the barriers and challenges affected populations face in accessing suitable housing options. It assesses factors such as specific challenges for some community groups, tenure security, and physical housing conditions that may limit access to rental housing. The section also explores specific challenges faced by IDPs, IDP returnees, and the host communities in accessing rental accommodations.

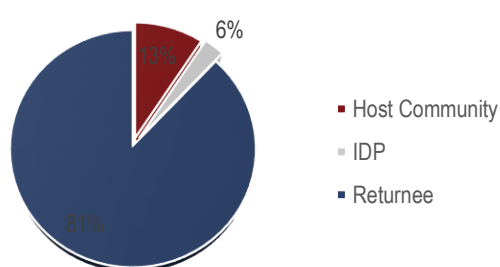


Figure 28: Tenant Type

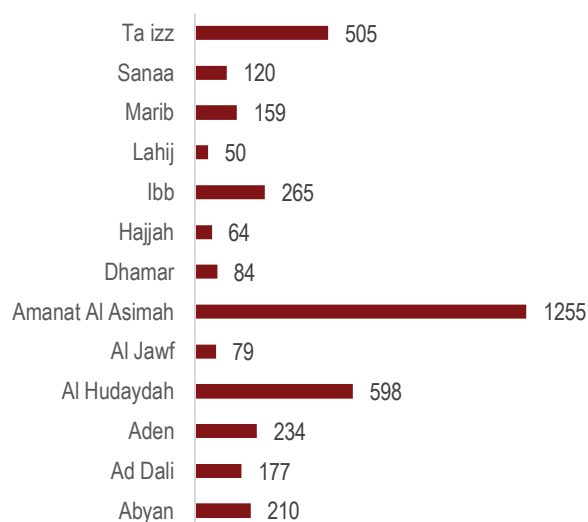


Figure 29 Number of households surveyed per governorate

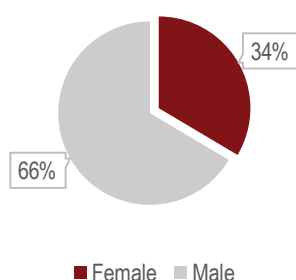


Figure 30: Gender of interviewees

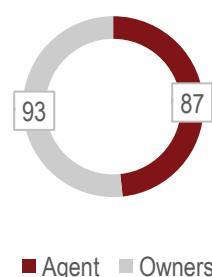


Figure 31: Number and type of assessed rental service providers

Based on the data provided in figures 29, 30 and 31, it indicates that the majority of the surveyed households are IDP returnees, accounting for approximately 81% of the sample. This suggests a significant population of individuals who have previously left the area of displacement and have returned is renting potentially due to housing damage. Host communities make up around 13% of the surveyed households, representing the local residents who are living in or providing rental accommodations. Only 6% of the surveyed households are internally displaced persons (IDPs). The

survey also incorporates a gender perspective, with 34% of the tenant households surveyed representing females. This inclusion of gender data allows for a more comprehensive understanding of potential variations and specific needs among male and female tenants. To gather a comprehensive assessment of rental accommodations, data was collected through two methods: a survey of tenant households and interviews with rental service providers. A total of 180 interviews were conducted with rental service providers, with 52% representing landlords and 48% representing real estate agents. This balanced distribution ensures insights from different types of rental service providers, contributing to a comprehensive understanding of the rental market dynamics.

## Suitability and Evaluation of Housing

Assessing the suitability and quality of available housing options is an essential aspect in meeting the specific needs and preferences of the affected population. In the context of rental accommodations, evaluating the suitability of housing involves considering factors such as the size of the housing units, tenant security provision and protection, the presence of essential services, and the overall condition of the properties. This evaluation helps determine if the access and availability of rental accommodations align with the requirements and preferences of the individuals or households seeking housing.

Based on the data obtained from the interviews conducted in Yemen's Northern Governorates and the evaluations of various aspects of their housing Figure 32, the findings were as follows:

- **General Evaluation of Housing:** The majority find their housing moderately satisfactory. However, about 24% indicated dissatisfaction, suggesting the need for improvements in housing quality.
- **Availability of Basic Services:** More than half of the households have a moderate level of access to basic services. About 26% reported poor access to services, highlighting a critical gap.
- **Adequacy of Space:** Almost half of the households are moderately satisfied with the space available, but about 28% indicated a need for more extensive housing solutions.
- **Protection:** A notable proportion (representing 29% of those interviewed) feel inadequately protected from environmental factors, pointing to a need for better housing materials and construction techniques.

The data indicates that while a majority of households in the Yemen's Northern Governorates find their housing conditions to be moderately satisfactory, there are significant areas of concern, particularly in terms of basic service availability, space, and environmental protection. These findings should inform targeted interventions aimed at improving housing conditions, with a focus on the most critical areas identified by the respondents.

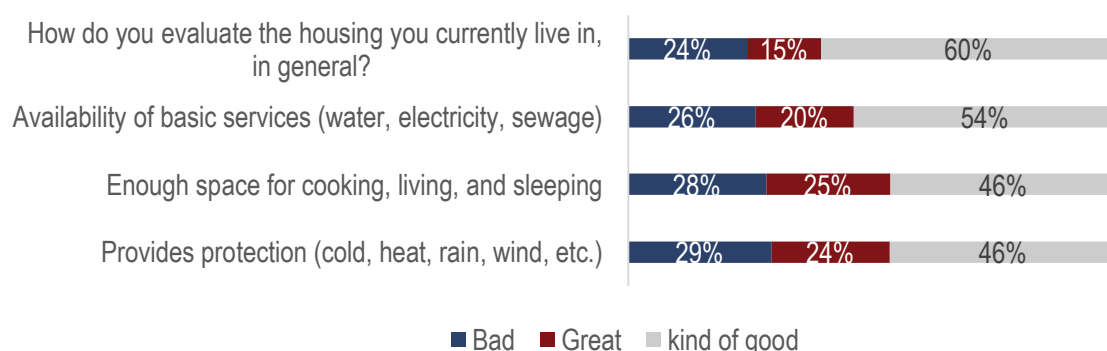


Figure 32: Suitability and Evaluation of Housing-Yemen Northern Governorates

Analyzing the housing conditions in the Southern Governorates of Yemen, as reflected in the survey data figure 33, reveals insightful trends and perceptions among the residents regarding their living environments as follows:

- **Protection:** The majority feel moderately protected due to the adequacy of housing structures against environmental factors, but few respondents highlight room for improvement.
- **Suitability of Space:** There is general satisfaction with the available space, but a notable portion of respondents (representing 27%) still struggle with inadequate space, emphasizing a need for larger or better-designed living areas.
- **Neighborhood Situation:** It suggests a generally favorable perception of the neighborhood environment, highlighting positive aspects linked to feeling of safety, community cohesion, and access to local amenities.
- **Availability of Basic Services:** While there is a moderate level of satisfaction with basic services, a substantial proportion of respondents (representing 33%) still face challenges, indicating a need for public infrastructural improvements.
- **Privacy for Family Members:** The high rate of dissatisfaction (representing 45% of those interviewed) with privacy underscores a critical issue in housing design and space, pointing to the necessity for more private living spaces in homes.
- **Overall Housing Evaluation:** Most respondents are moderately satisfied with their housing, but there remains a significant percentage (representing 23.5% of those interviewed) who are not satisfied, highlighting areas for potential improvement.

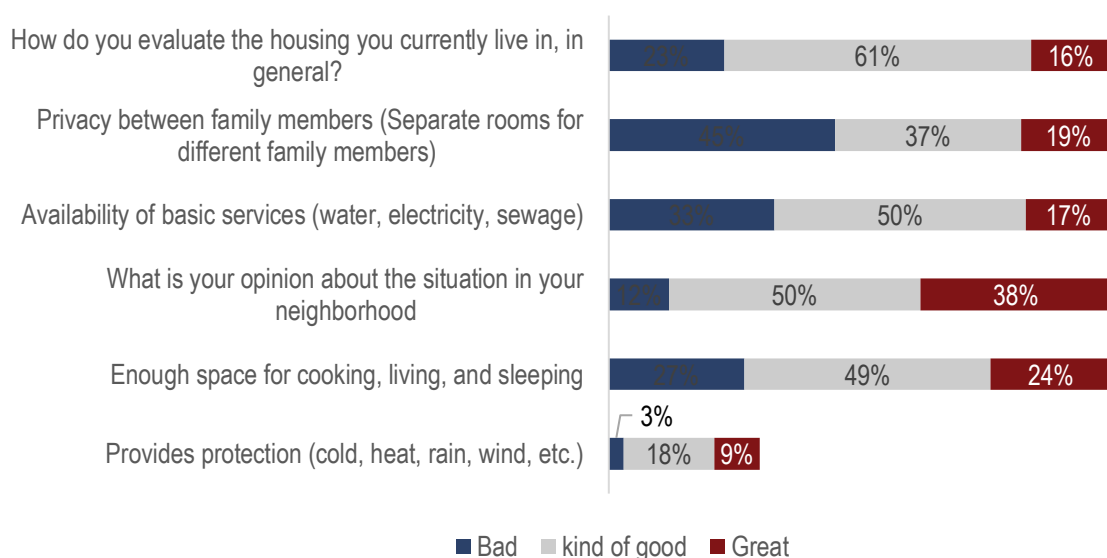


Figure 33: Suitability and Evaluation of Housing-Yemen Southern Governorates

The data from the Yemen Southern Governorates reveals a landscape where respondents generally find their living conditions acceptable, yet face notable challenges in terms of privacy, space, and the quality of basic services. It reflects a more positive view of neighborhoods and community cohesion that might compensate for some housing

challenges. However, the need for targeted interventions to address specific issues like privacy and service availability is evident.

### Distance from Public Services:

A key aspect of understanding the living conditions of tenants in rental accommodations is their proximity to public services, which significantly impacts their daily lives, employment opportunities, and access to essential amenities.

The survey specifically asked tenants about the distance of their households from public services, the findings revealed interesting trends. Based on the data in figure 34: The majority of the interviewed tenants, approximately 54.5%, described their proximity to public services as 'near'. This suggests a significant portion of rental accommodations is conveniently located, providing ease of access to essential services like healthcare, education, and shopping facilities.

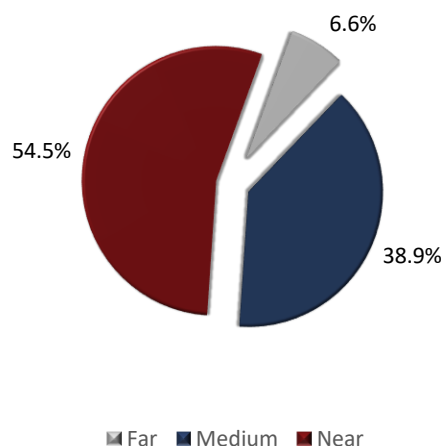


Figure 34: Distance from public services

A substantial 38.9% of respondents indicated that their homes are at a 'medium' distance from public services. While not as ideal as being 'near', this implies a reasonable level of accessibility, where services are not too far off but might require some travel. A smaller fraction, 6.6% of respondents, reported being 'far' from public services and experiencing more significant challenges in accessing essential services, which could affect their quality of life and daily convenience. This analysis highlights the importance of location in rental housing. For those living 'near' or at a 'medium' distance, the ease of accessing public services can contribute to a higher quality of life, reducing travel time and costs, more job opportunities, and potentially leading to better health and educational outcomes. The 6.6% living 'far' from public services are a concern. This distance can translate into increased travel expenses, time, and potential difficulties in emergencies, particularly for those with health issues or families with school-going children.

### Availability of Lease Contract:

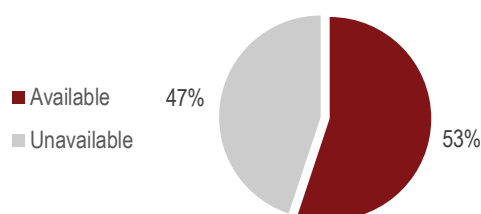


Figure 35: Availability of Lease Contract

An essential component of securing rental accommodation is the availability of a lease contract, which not only formalizes the rental agreement but also offers legal protection to both tenants and landlords. In the survey, the questionnaire delved into the prevalence of lease contracts among tenants, unveiling critical insights that bear upon the accessibility of rental accommodations. The survey results (Figure 35) indicate a nearly even split in the availability of lease contracts for rental accommodations.

About 53% of respondents reported that lease contracts are available, while 47% indicated that they are unavailable. The availability of lease contracts for a slight majority suggests a level of formality and security in over half of the rental arrangements. However, the nearly equal proportion of unavailable contracts presents a concerning picture, potentially exposing a considerable number of tenants to risks associated with informal rental agreements. For those who have lease contracts, this typically means a clearer

understanding of their rights and obligations, rent stability, and a formal mechanism for resolving disputes. It also provides a sense of security and predictability in their housing situation. Unlikely, the lack of a lease contract can leave tenants vulnerable to sudden rent increases, eviction without notice, and other forms of instability. Without a formal agreement, they may have limited legal recourse in disputes and face challenges in asserting their rights as tenants.

## 4.2.2 Availability

This subsection analyzes the availability of rental accommodations in the country. It assesses the availability of rental properties in different geographic areas and examines any fluctuations in availability due to the current crisis. It also explores the impact of population movements, such as displacement influxes, on the availability of rental accommodations.

### Status of Rental and Housing in the Area

#### Current State of Rental Accommodation

In the assessment of the housing market, a stark disparity emerges in the availability of rental accommodations. The survey, encompassing responses from real estate agents and landlords, reveals a significant imbalance: only 30% report that rental housing is readily available and accessible, while a substantial 70% indicate its scarcity and difficulty to obtain. This discrepancy is not merely a matter of numbers but reflects deeper market dynamics.

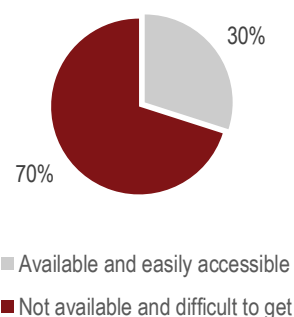


Figure 36: Availability of rental accommodation in the area

#### Challenges for Internally Displaced Persons (IDPs)

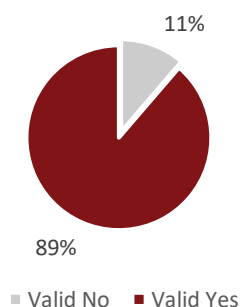


Figure 37: In your opinion, do the IDPs face any special challenges in access and value of rental housing? Frequency

A concerning aspect of the findings is the specific plight of IDPs in accessing rental housing. An overwhelming 89% of our respondents acknowledge the unique hurdles faced by this group. This statistic is more than a mere number; it underscores a systemic issue that demands attention.

### Basic Housing

Based on the Figure 38, it shows the distribution of facilities in housing such as kitchens, toilets, lounges, and rooms. The vast majority of respondents (representing 93.7%) have one kitchen, which is typical for most homes. A small percentage (representing 5.4%) do not have a kitchen, which may indicate either a reliance on communal cooking facilities or alternative arrangements like outdoor cooking.

A significant number of households (representing 80.4%) have one toilet, suggesting standard sanitary facilities for most residents. Few households have two toilets (representing 18.4%), and the number drops substantially to three or more, indicating that additional toilets are a luxury or indicative of larger family homes.



Most respondents (representing 82.4%) have one lounge, which likely serves as the main living area for family activities and entertainment. There is a notable fraction (representing 14.9%) without a lounge, which could impact the living quality and space for relaxation and social activities.

There is a wide distribution in the number of rooms per household. A majority of respondents have one room (representing 22.7%) or two (representing 41.4%), suggesting modest living spaces, while a smaller yet significant proportion have three rooms (representing 26.7%). Four or more rooms are less common, indicating larger household sizes or more affluent families. Additionally, the findings suggest that most households have access to basic housing amenities, with a standard being one kitchen, one toilet, one lounge, and one or two rooms.

The presence of households without kitchens or lounges suggests that some residents may face challenges related to adequate living space and facilities. The number of toilets and rooms may also serve as indicators of socio-economic status, with more facilities likely correlating with higher income or larger families.

### 4.2.3 Affordability

This subsection focuses on the affordability of rental accommodations in the country. It examines the rental prices and the ability of affected populations, including IDPs, IDP returnees, and host communities, to afford suitable housing. It assesses the financial barriers and explores the impact of market dynamics, such as changes in energy costs or sudden population movements, on rental prices.

#### Monthly Average Rental Prices

#### Findings of Real Estate Agents and Landlords

The monthly rental prices vary depending on the location and market conditions. Figure 39 shown below, presents the average cost of rent taking into consideration the factors that influence rental costs, such as the location, the size, and the type of property.

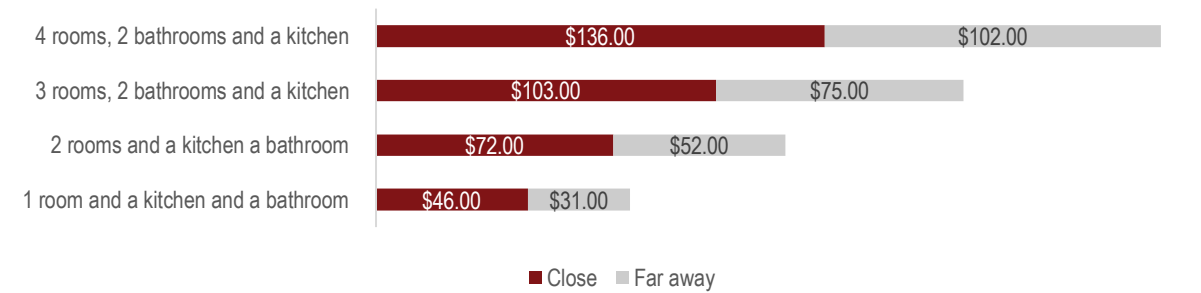


Figure 39: Average Expected Rent

The data indicates that rental prices are contingent upon both the size of the accommodation and its location relative to central areas or services. One-room accommodation is expected to be rented for \$46 when close to services and \$31 when further away. The two-room option shows a similar pattern, with a rental cost of \$72 close to services and \$52 at a distance. Larger accommodations with three rooms and additional facilities follow this trend, with rental cost at \$103 when centrally located and \$75 when more remote. The most spacious accommodations with four rooms is the highest expected rental cost at \$136 close to services, dropping to \$102 when located farther away. This data underscores a consistent preference for proximity reflected in higher rents, alongside a clear increase in rental prices corresponding to larger living spaces.

## Findings of Surveyed Tenants

Based on the information collected, the majority of the surveyed tenants fall within the lower rent stays, with 31% paying less than \$39, and another 29% paying between \$40 to \$64 per month. This suggests the availability of affordable housing options. There is also a decline in the percentage of tenants living in housing that require higher rental costs, with 16% paying between \$65 to \$79, and only 11% paying between \$80 to \$100. This could indicate that as rent prices increase, fewer

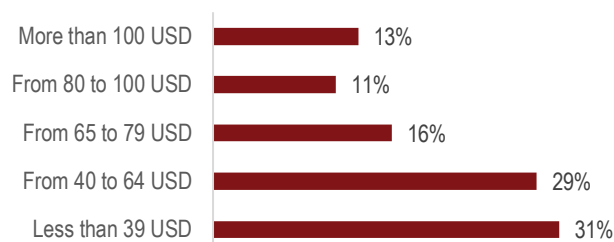


Figure 40: Monthly Rent

households can afford or are willing to pay these amounts. There is a notable 13% of households paying more than \$100 per month for rent. This group might represent a higher-income population, enjoying higher housing quality, or those located in more expensive neighborhoods. The concentration of households in the lower rent ranges raises questions about the overall affordability of housing. It may suggest a need for more affordable housing options or reflect a market where the majority of renters have limited financial means. As monthly rent increases, fewer households appear to be represented, suggesting an economic stratification based on rent levels. The findings might be indicative of the effectiveness of any housing subsidies or financial assistance programs that are in place. The impact of keeping rent affordable could be assessed.

## Price Changes

This section presents an analysis of price changes in rental amounts using data from individual surveys and interviews with real estate agents to reach a comprehensive understanding of the rental market.

The data collected from the real estate agents and landlords reveals that approximately 35% of respondents reported no change in rental amounts during the past year. Around 32.8% indicated a modest increase of less than 10%, while 32.25% reported a significant increase of more than 10%.

Looking ahead to the next six months, the majority of respondents believe that rental amounts will remain constant. Specifically, 28.2% anticipate a slight increase of less than 10%. The remaining respondents expect rental amounts to increase by more than 10%. When comparing the price changes observed in the past year and the expectations for the next six months, the results indicate a generally positive outlook. The majority of respondents anticipate that rental costs will either remain constant or experience a minor increase of less than 10%. These findings suggest a diverse rental market landscape. While a significant portion of respondents reported no change or modest increases in rental

amounts, a notable segment experienced substantial price hikes. However, overall expectations indicate a positive sentiment, with the anticipation of stable or slightly increasing rental costs.

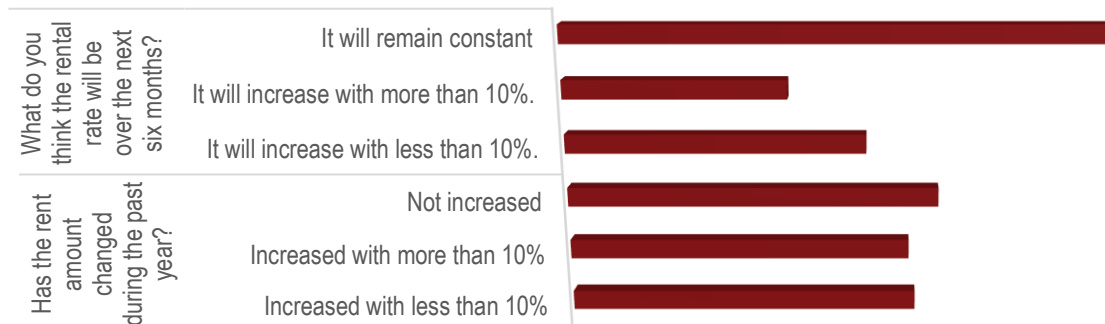


Figure 41: Rent amount changes- real estate agents

Based on data collected from surveyed tenants, it examined the changes in rent amounts during the past six months and the anticipated changes for the next six months. Regarding rent amount changes in the past six months, approximately 63% of respondents reported no change, suggesting a stable rental market during this period. Around 36% of respondents indicated an increase in rent, while only 1% reported a decrease in rent. Among those who experienced changes, the majority stated that it was a one-time change.

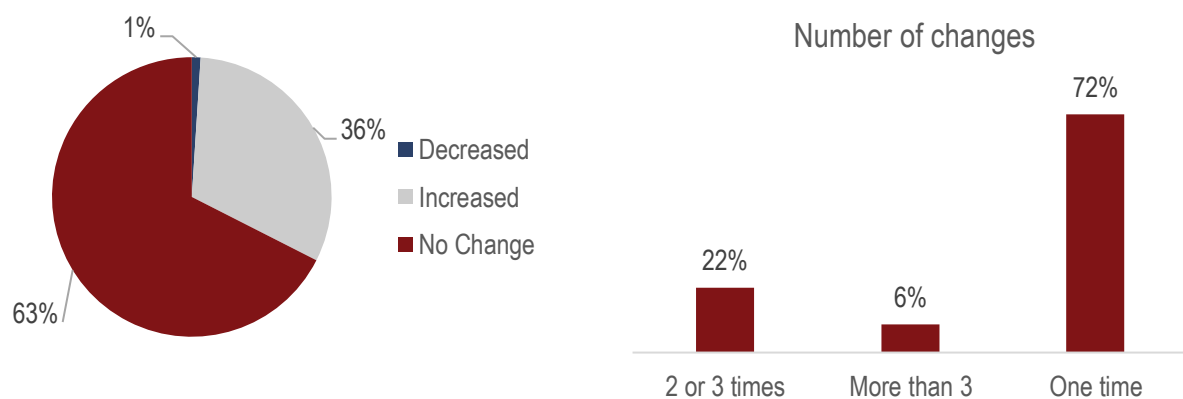


Figure 42: Has the rent changed in the last 6 months?

Looking ahead to the next six months, the majority of respondents anticipate further changes in rent amounts. Specifically, 31% of respondents expect no change, indicating that they anticipate a continuation of stable rental prices. However, the remaining respondents believe that rent will decrease during this period.



Figure 43: Your expectations about rental changes in the coming months

## Payment of Rent and Eviction Threats

The survey results indicate significant affordability issues among tenants in both the Yemen Southern and Northern Governorates, with 69% in the southern governorates and 81% in the northern governorates having unpaid rent accumulations. Additionally, over half of these tenants, 54% in the southern governorates and 60% in the northern governorates of Yemen, have faced eviction threats due to unpaid rent. These figures suggest a critical need for policy intervention to address rent affordability and provide protections to prevent evictions and potential homelessness.

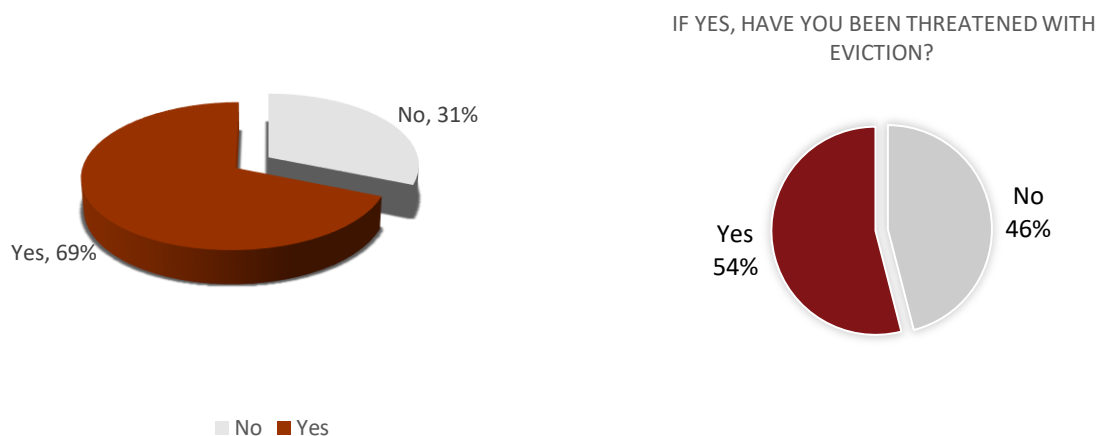


Figure 44: Accumulative unpaid rent -Yemen Southern Governorates

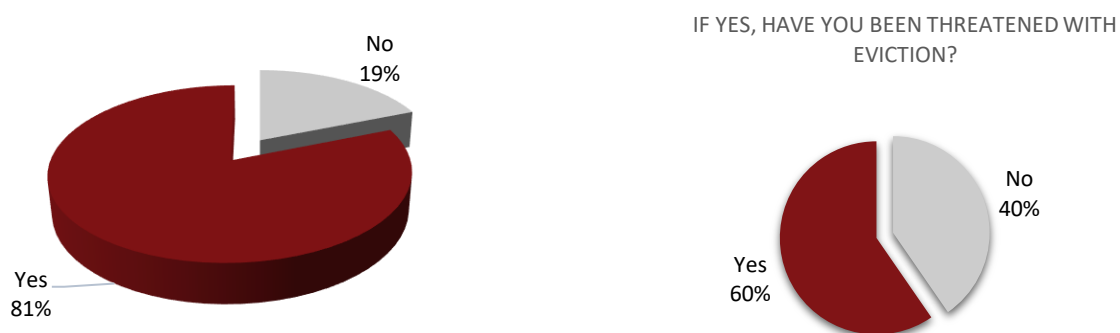


Figure 45: Accumulative unpaid rent -Yemen Northern Governorates

## 4.2.4 Market Policies and Constraints

The findings reflected a detailed view of real estate agents and landlords perceptions of the negative and positive impacts of rental support cash provision as follows:

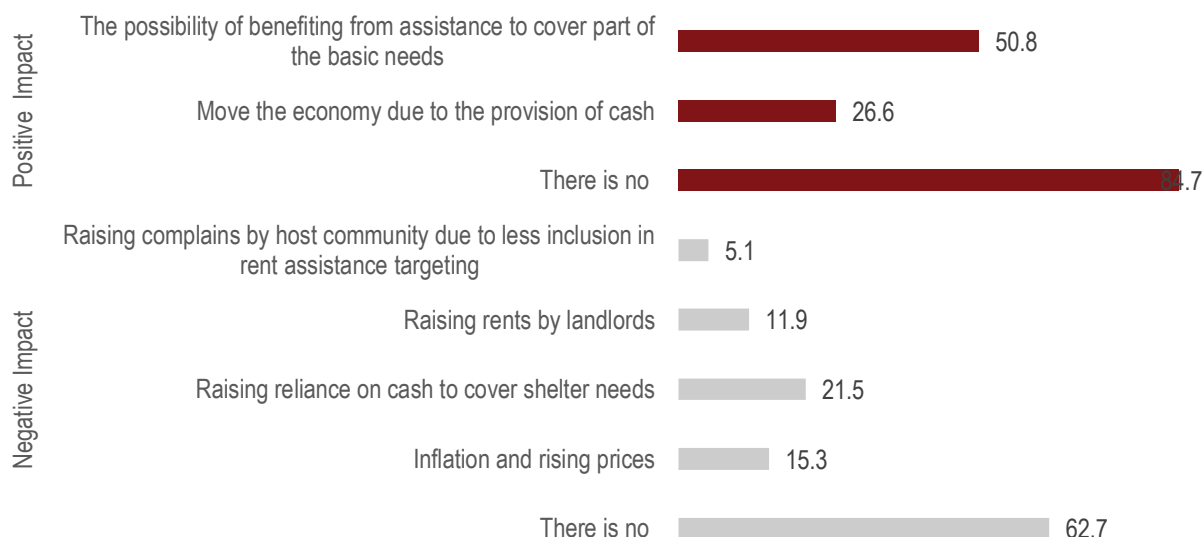


Figure 46: Negative and Positive Impact (Rent cash provision)

### a) Negative Impacts

A significant majority of the landlords and real estate agents interviewed, 62.7%, perceive no negative impact from cash rent provisions, suggesting that many agents may view the current system as functioning adequately or that the benefits outweigh the negatives. A smaller segment, 15.3%, identifies inflation and rising prices as a concern, indicating that a subset of agents is aware of market dynamics where cash provision may be driving costs upward. Notably, 21.5% of real estate agents see an increased reliance on cash to cover shelter needs as a negative outcome, perhaps due to concerns over financial sustainability or dependency. Only 11.9% of those interviewed indicate that landlords raising rents has a negative impact, while a minority, still reflects a recognition that rent assistance can lead to higher rental prices. A small percentage, 5.1%, report complaints from the host community regarding less inclusion in rent assistance programs, highlighting a potential of social tension. Nevertheless, 84.7% voiced worry regarding leasing their accommodations to IDPs, primarily due to concerns that they might struggle with payment or face difficulties in reclaiming their property in case of payment issues.

### b) Positive Impacts

About 26.6% acknowledge that cash provision helps move the economy, indicating some recognition of the larger economic benefits. Half of the real estate agents interviewed see the potential for beneficiaries to use assistance to cover basic needs beyond shelter as a positive aspect, illustrating the versatility of cash assistance.

The findings reflected a mixed view among real estate agents and landlords. While many do not perceive negative impacts, there is a recognition of certain market pressures like inflation and dependency on cash aid. Similarly, while most real estate agents do not see positive impacts, a significant number recognize benefits such as economic stimulation and flexible use of assistance for basic needs rather than benefiting shelter outcomes.

The perceptions of real estate agents regarding cash support for rent reveal a predominantly neutral to positive sentiment concerning its impact, with a notable portion of real estate agents highlighting specific market challenges.



Conversely, the positive impacts are less recognized, with notable exceptions regarding economic activity and the flexible use of assistance.

### 4.3 Cash Transfer Services

This section of the assessment provides an overview of cash transfer services in the region. It evaluates the availability, accessibility, efficiency, and reliability of these services.

According to the survey conducted with households in the targeted areas, the findings revealed that 95% of respondents reported the availability of financial service providers in their area. This indicates a strong presence of financial institutions within the region, offering a range of financial products and services. Only 5% of respondents reported a lack of financial services providers. This data suggests that the majority of households in the surveyed areas (95% IDP Returnee, 100% IDPs and 92% HC) have access to financial services, indicating a well-developed financial infrastructure. According to the survey responses, 99% of households in the areas reported that it is easy to receive cash through the available financial service providers. Additionally, 99% of respondents mentioned that these providers have branches nearby. This suggests a high level of convenience and accessibility in terms of accessing cash and conducting financial transactions. The data indicates a positive perception among households regarding the ease of cash transactions and the availability of nearby branches.

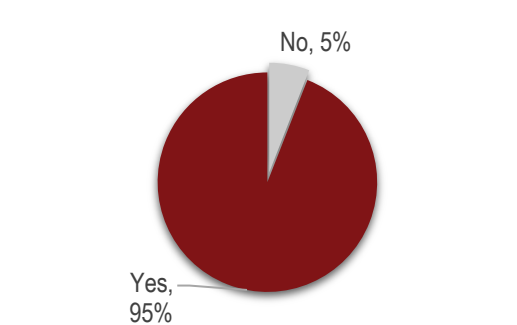


Figure 47: Are their financial services providers in the area?

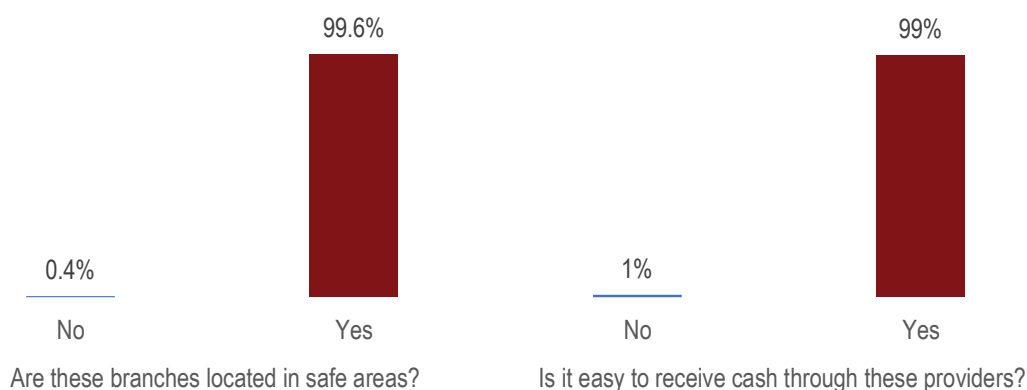


Figure 48: Access to financial services providers

According to the survey respondents, 92% prefer to receive financial aid in the form of cash over the counter, while 8% prefer receiving cash through a mobile team. This indicates a strong preference for physical cash among the majority of respondents, likely driven by convenience and familiarity. However, a small percentage of respondents are open to receiving cash through mobile teams, suggesting a willingness to explore alternative distribution methods.



## 5. Conclusion and Recommendations

### 5.1 Conclusion

Based on the key findings presented in this document, here are the main conclusions that can be drawn to meet the market assessment objective and scope of work.

#### Shelter and NFI Materials:

- Local markets have sufficient access, availability, necessary supply chains, people have sufficient access to markets and warehousing capacity to meet urgent shelter materials and NFI demands from the affected population, supporting a cash-based response. Legal compliance is also strong.
- Cash assistance is the most preferred modality by beneficiary households for both shelter materials and NFIs, allowing independence and choice. Contractors are also an option where there is a lack of technical skills.
- Materials price matrix is crucial in providing data and analysis on the affordability of items across regions in Yemen and monitoring inflation impacts on vulnerable populations.

#### Rental Accommodation:

- Housing availability is constrained, with IDPs facing unique access challenges. Cash assistance can help address affordability issues and eviction threats faced by many tenants (specifically, 60% of female HHs), since they have no difficulties to access financial services.
- Intervention is needed to improve access to basic facilities, space suitability, and service proximity/quality in some areas.

#### Market Environment:

- Strengthening regulatory frameworks, trader associations, and coordination platforms could bring stability and fair competition to Yemen's unstable markets.
- Cash transfers are seen to stimulate local economies but may spur inflation or rent increases if not properly monitored.

#### Cash Transfer Services:

- The country has a well-developed financial infrastructure that supports cash-based assistance, with most beneficiaries preferring physical cash distribution through nearby branches and some are open to alternative options.

In conclusion, cash and in-kind modalities are deemed feasible in Yemen based on sufficient market access, supply, and preference. Affordability concerns also exist, which cash may not fully resolve given its constraints. Continued monitoring of market prices, housing, and market policies is required to understand impacts and mitigate risks over time.




## **5.2 Recommendations**

- Utilize cash-based assistance as the preferred modality for providing shelter materials and NFIs, as it allows beneficiaries to have independence and choice.
- Consider engaging contractors when technical skills are lacking in certain areas.
- Develop a materials price matrix to monitor the affordability of items across different regions and assess the impact of inflation on vulnerable populations.
- Address the housing availability constraints faced by supporting IDPs self-reliance and livelihood to address affordability issues and threats of evictions.
- Implement interventions to improve access to basic facilities, ensure suitable living spaces, and enhance the proximity and quality of services in certain areas.
- Consider cash distribution over the counter as the preferred method, while exploring alternative options for distribution.
- Shelter Cluster to conduct regular assessments to gain a better understanding of the market trend of price changes over time and to validate the accuracy of the prices.

Enhance awareness among Internally Displaced Persons (IDPs) regarding the significance of formal rental agreements. This initiative aims to reduce potential protection risks such as evictions and bolster tenant security, thereby promoting a more secure and stable living environment.

## Annexes

### Annex I: Assessment Tools

Market Assessment Form: Individual Survey	 Market_Assesment_Form - Individual Surve
Market Assessment Form: Real Estate Agent Interview	 Market_Assesment_Form - Real Estate Age
Market Assessment Form: Supplier Interview	 Market_Assesment_Form - Supplier Interv

### Annex II: Analysis Per Governorate

<a href="#">Sana'a Governorate</a>
<a href="#">Amant Al Asimah Governorate</a>
<a href="#">Taiz Governorate (Northern districts)</a>
<a href="#">Taiz Governorate (Southern districts)</a>
<a href="#">Marib Governorate</a>
<a href="#">Lahj Governorate</a>
<a href="#">Hajjah Governorate</a>
<a href="#">Dhamar Governorate</a>
<a href="#">Al Jawf Governorate</a>
<a href="#">Al Hudaydah Governorate (Northern districts)</a>
<a href="#">Al Hudaydah Governorate (Southern districts)</a>
<a href="#">Aden Governorate</a>
Ad Dali Governorate (Northern districts)
<a href="#">Abyan Governorate</a>
Ad Dali Governorate (Southern districts)

### **Annex III: Shelter Materials and NFIs prices matrixes**

This sub-section presents the prices of the Shelter and NFIs materials. For reference, the prices listed below were collected during the assessment period mostly between July and September 2023. The price calculation includes the minimum, maximum, and median prices.

For reference, the average exchange rate that was conducted during the data collection process for 1 USD was 1,420 YER in Yemen Southern Governorates and 527 YER in Yemen Northern Governorates:

Regarding the comparison of prices between Yemen's Northern and Southern Governorates, we have conducted a comprehensive analysis based on the collected data. Out of the 118 items included in the assessment, it was observed that approximately 24 items in the Northern Governorates had average prices that were 29% lower than those in the Southern Governorates. However, when considering the overall average prices across all items, the Southern Governorates exhibited lower prices with an average percentage difference of 13%



## Shelter Material Prices

Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
<b>Wooden Materials</b>								
<b>Wooden Poles</b>	Wooden pole: Dimensions: 75mm x 75mm x3000mm	PCS	YER 3,800	YER 5,800	YER 4,800	YER 7,000	YER 14,300	YER 10,150
	Wooden pole: Dimensions: 50mm x 50mm x3000mm	PCS	YER 2,500	YER 4,000	YER 3,100	YER 4,650	YER 11,500	YER 6,850
	Wooden pole: Dimensions: 75mm x 75mm x4000mm	PCS	YER 5,200	YER 7,500	YER 6,300	YER 10,300	YER 26,100	YER 14,100
	Wooden pole: Dimensions: 50mm x 50mm x4000mm	PCS	YER 3,000	YER 6,000	YER 4,300	YER 5,700	YER 14,300	YER 8,600
<b>Wooden Plate</b>	Wooden plate: Size: 100mm width x 22mm depth x 3000mm length	PCS	YER 1,700	YER 4,500	YER 2,150	YER 4,500	YER 10,500	YER 6,200
	Wooden plate: Size: 100mm width x 22mm depth x 4000mm length	PCS	YER 2,000	YER 4,300	YER 2,800	YER 5,000	YER 9,305	YER 6,700
	Wooden plate: Size: 100mm width x 50mm depth x 5000mm length	PCS	YER 6,500	YER 10,000	YER 7,600	YER 12,000	YER 20,800	YER 1,600
<b>Wooden Plywood</b>	Plywood panel size, 1200mmx 2400mm, 9 mm thick, first class, minimum 7 plies	PCS	YER 8,200	YER 12,000	YER 9,550	YER 17,000	YER 32,650	YER 23,700
	Plywood panel size, 1200mmx 2400mm, 6 mm thick, first class minimum 7 plies	PCS	YER 5,800	YER 9,500	YER 7,000	YER 14,000	YER 24,000	YER 18,050
<b>Steel Materials</b>								

Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
Iron Sheets	Box profile galvanised iron roofing sheets, 0.5mm thick, 1000mm wide length 2500mm	PCS	YER 7,000	YER 13,000	YER 9,700	YER 17,800	YER 28,000	YER 21,900
	Box profile galvanised iron roofing sheets, 0.5mm thick, 1000mm wide length 6000mm	PCS	YER 18,000	YER 25,000	YER 20,800	YER 35,600	YER 55,000	YER 45,100
	Box profile galvanised iron roofing sheets, 0.21mm thick, 1000mm wide length 6000mm	PCS	YER 7,000	YER 13,000	YER 9,600	YER 18,650	YER 33,700	YER 25,000
Iron Ridge Cap	Galvanised iron ridge cap, 0.5 mm thickness, at least 600mm wide, ( length available market 3.5m)	PCS	YER 5,000	YER 9,000	YER 7,350	YER 5,600	YER 37,300	YER 22,600
Iron Wire Mesh	Square wire mesh from galvanised iron with hole 2cm x 2cm, to be fixed on purlins to restrain thermal insulation,(Roll 12m x 1m)	Roll	YER 2,500	YER 12,000	YER 5,000	YER 14,500	YER 37,300	YER 21,900
Iron Net	Iron Net 5cmx5cm opening size (Galvanised chain link iron mesh). Size of the roll is (10m x 2m)	Roll	YER 15,000	YER 23,000	YER 15,800	YER 22,400	YER 44,500	YER 31,000
Iron Net	Iron Net 5cmx5cm opening size (Galvanised chain link iron mesh) isolated with a plastic layer. Size of the roll is (10m x 2m)	Roll	YER 19,000	YER 48,000	YER 28,000	YER 61,000	YER 94,200	YER 79,000
Steel Hollow Section	Steel member hollow section with a cross section of 50 * 25 mm and a thickness of 1.25 mm - 6m length	PCS	YER 2,500	YER 7,000	YER 5,000	YER 11,200	YER 23,000	YER 14,400

Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
<b>Galvanized Metal Mesh</b>	Galvanized iron "Daymen mesh" 1.22x2.44 m and 1.3mm thickness	PCS	YER 2,800	YER 7,000	YER 4,950	YER 8,500	YER 20,500	YER 13,600
<b>GI Pipes</b>	Galvanized iron pipe Diameter: 2.5-inch Thickness: 2.4 mm Length: 6 m	PCS	YER 14,500	YER 23,000	YER 17,500	YER 33,600	YER 78,000	YER 55,000
	Galvanized iron pipe Diameter: 1.0-inch Thickness: 1.5 mm Length: 6 m	PCS	YER 3,000	YER 7,500	YER 5,300	YER 10,150	YER 39,200	YER 16,400
	Galvanized iron pipe Diameter: 3/4-inch Thickness: 1.25 mm Length: 6 m	PCS	YER 3,590	YER 6,500	YER 4,500	YER 10,000	YER 18,000	YER 13,900
<b>Reinforcement Steel Bars</b>	Reinforcement Steel bars: Diameter: Ø10 mm. Length: 2.0 m	PCS	YER 500	YER 750	YER 600	YER 1,000	YER 2,500	YER 1,600
	Reinforcement steel bars: Diameter: Ø 12mm Length: 12 m	PCS	YER 4,000	YER 5,250	YER 4,600	YER 10,500	YER 22,600	YER 13,300
	Soft steel bars Ø 6 mm diameter and 6 m length	PCS	YER 700	YER 2,000	YER 1,200	YER 3,000	YER 6,150	YER 4,600
<b>Iron Bars</b>	Iron Bar: 2mm x 10mm section for walls, iron bar length is 6 meters	PCS	YER 4,000	YER 6,900	YER 5,300	YER 5,800	YER 21,700	YER 8,700
<b>Iron Plates</b>	Iron plate: 1mm thick x 50 cm in height for walls at bottom ends of the walls	m2	YER 4,400	YER 7,000	YER 5,350	YER 11,100	YER 20,000	YER 15,200
<b>Shelter Covering</b>								
<b>Plastic Sheets</b>	Plastic Sheet, Dimensions: 4x6 Yard (3.5x5.35) m Weight: approx. (3.5 - 4.5) kg	PCS	YER 4,000	YER 7,500	YER 5,400	YER 6,000	YER 18,500	YER 13,000

Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
	Plastic Sheet, Dimensions: 6x8 Yard (5.2x6.8) m Weight: approx. (6.2) kg	PCS	YER 7,200	YER 12,800	YER 9,600	YER 10,000	YER 25,900	YER 15,700
	Plastic sheet PVC-650 2mm for a tent (4x4x2.5).	m2	YER 5,000	YER 10,000	YER 6,400	YER 14,200	YER 31,500	YER 21,800
	Banner Vinyl materials	m2	YER 800	YER 3,600	YER 2,300	YER 4,200	YER 9,600	YER 3,900
Thermal Insulation Foam	Thermal insulation foam, tin double sided 15mm thick, (Roll 20m x1m x15 mm.)	Roll	YER 12,000	YER 28,500	YER 20,900	YER 34,000	YER 74,000	YER 48,800
	Thermal insulation foam, tin double sided 8mm thick, (Roll 20m x1m x8 mm.)	Roll	YER 10,500	YER 23,000	YER 14,000	YER 20,400	YER 38,000	YER 25,450
Mosquito Net	Mosquito net / fly mesh, to be fixed on gaps between plywood walls and CGI roof along the length of shelter ( roll 12m x 1m )	Roll	YER 8,000	YER 15,000	YER 11,400	YER 15,000	YER 30,400	YER 24,100
Local Materials								
Khazaf	Al-Khazaf" to cover the walls - Dimensions: 1.22x2.44 m - Length: 2.44 m - Width: 1.22 m - Thickness: not less than 5mm.	m2	YER 650	YER 1,350	YER 950	YER 2,000	YER 5,200	YER 3,000
Helfa/Thumam	Helfa/Thumam - Bundle Diameter: 20 cm - Bundle Parameter: 60 cm - Bundle Length: 50 cm	Bundle	YER 800	YER 3,000	YER 1,400	YER 10,000	YER 15,350	YER 12,100
Rehabilitation Materials								
Cement Blocks	Cement block 40*20*20 cm - Normal pressure - Solid	PCS	YER 355	YER 750	YER 460	YER 480	YER 1,450	YER 840
	Cement block 40*20*20 cm - Automatic pressure - Solid	PCS	YER 500	YER 750	YER 590	YER 950	YER 1,400	YER 1,000

Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
Doors	Cement block 40*20*20 cm - Normal pressure - Hollowed	PCS	YER 190	YER 500	YER 310	YER 350	YER 1,100	YER 680
	Cement block 40*20*20 cm - Automatic pressure - Hollowed	PCS	YER 290	YER 530	YER 400	YER 370	YER 1,800	YER 860
	Wooden door	m2	YER 35,000	YER 50,000	YER 40,950	YER 50,000	YER 235,600	YER 90,000
	Aluminium door normal section	m2	YER 23,500	YER 36,000	YER 30,350	YER 42,000	YER 95,100	YER 68,300
	Iron door with 1.25mm thickness	m2	YER 17,500	YER 29,500	YER 23,300	YER 40,000	YER 85,400	YER 63,800
Windows	Wooden Windows	m2	YER 20,000	YER 37,000	YER 26,000	YER 60,000	YER 120,000	YER 88,250
	Aluminium windows normal section	m2	YER 27,000	YER 42,000	YER 34,900	YER 74,600	YER 123,100	YER 102,500
Cement Bags	50Kg package amrani type or Alwatania or the available good quality in the area	Bag	YER 3,050	YER 4,500	YER 3,700	YER 6,500	YER 8,740	YER 7,500
Sand	Sand free of mud and impurities to be used for concrete mortar	m3	YER 6,600	YER 13,000	YER 9,000	YER 9,000	YER 15,800	YER 12,000
Gravel	Well graded to be used for concrete mortar	m3	YER 7,000	YER 13,300	YER 9,700	YER 8,000	YER 16,800	YER 11,600
Other shelter items								
Nylon Zip Ties	Heavy Duty Nylon Cable Tie Wire Zip Ties Self Locking Tie Wraps Cable Management Kit 100 pcs 16-inch 400mm x 4.6mm	Pack	YER 1,000	YER 4,000	YER 2,200	YER 4,000	YER 8,000	YER 5,300
Ropes	Sisal rope - Thickness 10 mm	m	YER 150	YER 300	YER 200	YER 120	YER 490	YER 250
	Sisal rope - Thickness 5 mm	m	YER 70	YER 190	YER 110	YER 100	YER 350	YER 190
	Nylon rope - Thickness: 5 mm	m	YER 40	YER 100	YER 60	YER 100	YER 360	YER 170
	Nylon rope - Thickness: 7 mm	m	YER 45	YER 125	YER 75	YER 100	YER 435	YER 200
	Nylon rope - Thickness: 8 mm	m	YER 50	YER 160	YER 90	YER 100	YER 400	YER 220



Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
Plastic Hose	Nylon rope - Thickness: 10 mm	m	YER 75	YER 180	YER 110	YER 110	YER 385	YER 240
	Flexible plastic hose 1 in diameter with a length of 100 m	Roll	YER 23,100	YER 45,000	YER 35,500	YER 72,000	YER 200,000	YER 111,000
PVC Pipes	PVC pipe 3/4 in diameter 6 m long for wiring	PCS	YER 1,800	YER 3,500	YER 2,600	YER 3,500	YER 8,500	YER 5,250
	PVC pipe 4 in diameter 2.8 mm thickness 5.5 m long for isolation of wooden poles	PCS	YER 5,500	YER 10,800	YER 8,000	YER 12,000	YER 38,000	YER 25,600
Nails	Nails, Roofing/umbrella with rubber gasket, Length: 63.25 mm (2.5 inches), diameter of head: 12.65mm, Thickness: 3.5 mm twisted, Box weight: 1kg	Pack	YER 1,150	YER 3,000	YER 1,800	YER 2,500	YER 5,500	YER 3,450
	Nails, Length: 4 Inch (100mm), Diameter: 2 mm, Box weight: 1kg, steel galvanized round wire common nail,	Pack	YER 1,000	YER 2,000	YER 1,400	YER 1,400	YER 3,000	YER 2,000
	Nails, Length: 3 Inch (75mm), Diameter: 2 mm, Box weight: 1kg, steel galvanized round wire common nail,	Pack	YER 1,000	YER 2,000	YER 1,300	YER 1,400	YER 2,800	YER 2,000
	Nails, Length: 2 Inch (50mm), Diameter: 2 mm, Box weight: 1kg, steel galvanized round wire common nail,	Pack	YER 900	YER 1,500	YER 1,200	YER 1,400	YER 2,900	YER 1,900
	Nails, Length: 1 Inch (25mm), Diameter: 1 mm, Box weight: 1kg, steel galvanized round wire common nail,	Pack	YER 800	YER 1,300	YER 950	YER 1,400	YER 3,000	YER 1,950
Empty Bags (Shwalah)	Empty Polypropylene bags - Size: (50 cm*75 cm) - Bag Capacity: (50 Kg)	PCS	YER 150	YER 450	YER 220	YER 170	YER 600	YER 350

Shelter Materials			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Item with specification	Unit	Min	Max	Average	Min	Max	Average
Wood Paint	Anti termite paint	Liter	YER 1,400	YER 2,800	YER 2,000	YER 3,000	YER 7,600	YER 5,200
	Window hinges: 2 inch mild steel butt hinge complete with fixing screws.	PCS	YER 200	YER 900	YER 450	YER 700	YER 2,000	YER 1,150
Hinges	Door hinges: 4" galvanised steel hinges, complete with fixing screws.	PCS	YER 400	YER 1,400	YER 700	YER 1,000	YER 3,300	YER 1,700
	Window latch bolt: galvanised steel straight barrel bolt latch complete with fixing screws 100mm long	PCS	YER 300	YER 900	YER 500	YER 750	YER 2,250	YER 1,200
Bolt Latch	Door Latch barrel bolt: galvanised steel straight barrel latch bolt, complete with fixing screws about 200mm long (internal)	PCS	YER 350	YER 1,000	YER 650	YER 1,000	YER 3,150	YER 1,700
	Door Latch barrel bolt: galvanised steel straight barrel latch bolt, complete with fixing screws about 200mm long (external lock)	PCS	YER 400	YER 1,000	YER 750	YER 1,400	YER 6,000	YER 2,800

## Non-Food Items Prices

Non-Food Items			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Items	Unit	Min	Max	Average	Min	Max	Average
<b>Bedding</b>								
<b>Blanket</b>	Blankets 1.5 x 2 m - Compositions: polyester 100% - Medium Thermal 1.5-2 kG	PCS	YER 3,500	YER 11,000	YER 5,700	YER 7,500	YER 21,500	YER 13,400
	Blankets 1.5 x 2 m - Compositions: polyester 100% - Medium Thermal 3-4 kG	PCS	YER 4,500	YER 16,000	YER 8,700	YER 9,000	YER 30,000	YER 21,100
<b>Mattress</b>	Mattresses - Dimensions: 1.7*0.9 m with a Thickness 10cm	PCS	YER 5,000	YER 15,000	YER 8,600	YER 9,250	YER 25,100	YER 20,500
<b>Bed Sheet</b>	Bed Sheets - Dimensions: 2.0 x 2.30m - Compositions: Cotton - Weight: 800 gram	PCS	YER 2,000	YER 7,500	YER 3,600	YER 3,500	YER 10,500	YER 5,800
<b>Kitchen/Household Materials</b>								
<b>Cooking pot</b>	Cooking pot with lid 7 liters aluminium	PCS	YER 2,400	YER 10,200	YER 5,500	YER 5,000	YER 21,500	YER 11,400
	Cooking pot with lid 5 liters aluminium	PCS	YER 2,200	YER 9,500	YER 4,600	YER 4,000	YER 17,000	YER 8,500
<b>Plates</b>	Plates - Stainless Steel	PCS	YER 800	YER 3,000	YER 1,700	YER 1,700	YER 6,500	YER 3,700
<b>Cups</b>	Cups - Stainless Steel	PCS	YER 150	YER 450	YER 300	YER 250	YER 1,300	YER 700
<b>Table Spoons</b>	Table Spoons - Stainless Steel	PCS	YER 50	YER 165	YER 100	YER 100	YER 1,850	YER 600
<b>Kitchen knife</b>	Kitchen knife with stainless steel blade	PCS	YER 500	YER 1,600	YER 950	YER 750	YER 3,000	YER 1,250
<b>Serving spoon</b>	serving spoon - Stainless Steel	PCS	YER 500	YER 1,100	YER 700	YER 900	YER 2,000	YER 1,500
<b>Bucket</b>	Bucket with lid and strong plastic handle to carry the bucket - Capacity: 17 liters - Weight: 800 grams	PCS	YER 1,300	YER 3,000	YER 1,900	YER 2,000	YER 9,500	YER 5,000
<b>Sleeping Mats</b>	Sleeping Mats - Dimensions: 1.8*0.9 m Composition: 100% synthetic yarns in a tightly wove	PCS	YER 1,700	YER 7,500	YER 2,300	YER 4,000	YER 10,900	YER 6,600

Non-Food Items			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Items	Unit	Min	Max	Average	Min	Max	Average
Mosquito nets	Mosquito nets - 100 % Polyethylene (PE) or Polyester (PES) - (180 cm length x 160 cm width x 150 cm height) +/- 5 % treated with WHOPEs (WHO Pesticide Evaluation Scheme)	PCS	YER 2,750	YER 7,000	YER 4,600	YER 1,500	YER 10,000	YER 5,150
Thermos	Water Cooler Container (Thermos) - with lid - Capacity: 8 liters - made of plastic - strong plastic handle to be carried	PCS	YER 4,000	YER 9,000	YER 6,550	YER 9,000	YER 18,000	YER 13,500
Cooking Stove	Cooking Stove - Cubical Yemeni Made local handcraft, made of chip-sum with fan in the side and opening in the top, with a Size of 24cm cylinder Hight	PCS	YER 2,500	YER 11,000	YER 5,300	YER 5,800	YER 20,350	YER 11,700
Local Sleeping mat	Local Sleeping mat - diameter 90 cm - made of Khazaf sheet - hand crafted	PCS	YER 2,000	YER 6,500	YER 3,400	YER 3,000	YER 12,000	YER 6,900
Solar Lamp	Solar Lamp - LED type - Battery: 7.5 Wh Li-ion NMC battery (2,200 mAh at 3.7V) - Life Span: 4+ years (1500 Charge cycles) - Can charge mobiles, lights, etc.	PCS	YER 5,500	YER 12,000	YER 8,400	YER 7,500	YER 23,300	YER 13,300
Clothes								
Pajama	Summer clothing - Male Adult: Cotton pajama average quality	PCS	YER 2,000	YER 4,750	YER 3,100	YER 3,000	YER 15,000	YER 7,100
	Summer clothing - Female Adult: Cotton pajama average quality	PCS	YER 2,000	YER 4,500	YER 3,000	YER 3,000	YER 11,500	YER 6,400
	Summer clothing - Male Child Adult: Cotton pajama average quality	PCS	YER 2,000	YER 3,750	YER 2,700	YER 2,500	YER 10,000	YER 5,700
	Summer clothing - Female Child Adult: Cotton pajama average quality	PCS	YER 1,500	YER 6,000	YER 2,800	YER 3,000	YER 9,500	YER 5,800
	Summer clothing - Infant: Cotton pajama average quality	PCS	YER 900	YER 2,500	YER 1,650	YER 1,700	YER 4,800	YER 3,150
	Winter Clothing - Male: Fleece pajamas	PCS	YER 2,225	YER 8,000	YER 4,100	YER 3,200	YER 13,000	YER 8,000

Non-Food Items			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Items	Unit	Min	Max	Average	Min	Max	Average
<b>Blanket</b>	Winter Clothing - Female: Fleece pajamas	PCS	YER 2,000	YER 6,000	YER 3,500	YER 2,800	YER 11,000	YER 7,000
	Winter Clothing - Children: Fleece pajamas	PCS	YER 1,000	YER 7,500	YER 2,520	YER 2,000	YER 10,500	YER 5,100
	Winter Clothing - Infant (under 2 years): pajamas	PCS	YER 700	YER 3,800	YER 1,800	YER 2,000	YER 7,500	YER 3,700
	Winter Clothing - Infant (over 2 years): pajamas	PCS	YER 1,000	YER 4,500	YER 2,300	YER 2,000	YER 7,600	YER 4,300
	Summer clothing - Infant: Cotton blanket average quality	PCS	YER 1,000	YER 3,200	YER 2,000	YER 2,000	YER 7,000	YER 3,900
	Winter Clothing - Infant (under 2 years): Fleece infant blanket	PCS	YER 1,000	YER 5,000	YER 2,200	YER 2,100	YER 9,500	YER 4,300
	Winter Clothing - Infant (over 2 years): Fleece infant blanket	PCS	YER 1,400	YER 5,500	YER 2,700	YER 2,100	YER 8,650	YER 4,300
<b>Socks</b>	Winter Clothing - Male: socks	PCS	YER 300	YER 1,000	YER 600	YER 500	YER 1,500	YER 1,200
	Winter Clothing - Female: socks	PCS	YER 300	YER 1,200	YER 550	YER 500	YER 2,500	YER 1,200
	Winter Clothing - Children: socks	PCS	YER 150	YER 1,000	YER 400	YER 500	YER 1,500	YER 900
	Winter Clothing - Infant (under 2 years): socks	PCS	YER 250	YER 1,000	YER 500	YER 500	YER 1,500	YER 1,000
	Winter Clothing - Infant (over 2 years): socks	PCS	YER 300	YER 1,100	YER 500	YER 400	YER 1,500	YER 900
<b>Hat</b>	Winter Clothing - Children: hat	PCS	YER 300	YER 2,500	YER 800	YER 1,000	YER 3,000	YER 1,800
	Winter Clothing - Infant (under 2 years): hat	PCS	YER 200	YER 1,500	YER 600	YER 700	YER 3,000	YER 1,600
	Winter Clothing - Infant (over 2 years): hat	PCS	YER 500	YER 1,700	YER 780	YER 700	YER 2,500	YER 1,600
<b>Sweater</b>	Winter Clothing - Female: sweater	PCS	YER 1,400	YER 6,000	YER 2,800	YER 2,000	YER 12,000	YER 5,200
	Winter Clothing - Children: sweater	PCS	YER 900	YER 5,000	YER 2,100	YER 2,000	YER 7,600	YER 4,100
<b>Shawl</b>	Winter Clothing - Male: shawl.	PCS	YER 800	YER 3,500	YER 1,700	YER 1,800	YER 6,000	YER 3,500
<b>Scarf</b>	Winter Clothing - Female: scarf.	PCS	YER 1,000	YER 3,500	YER 2,200	YER 1,500	YER 6,000	YER 3,200

Non-Food Items			Yemen Northern Governorates Price YER			Yemen Southern Governorates Price YER		
Category	Items	Unit	Min	Max	Average	Min	Max	Average
<b>Gloves</b>	Winter Clothing - Children: gloves	PCS	YER 200	YER 1,500	YER 500	YER 500	YER 2,600	YER 1,200
<b>Jaket</b>	Winter Clothing - Male: jacket	PCS	YER 2,000	YER 7,500	YER 4,500	YER 3,000	YER 18,000	YER 9,500





**Shelter Cluster Yemen**  
ShelterCluster.org  
Coordinating Humanitarian Shelter

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