Gaza Strip Food Supply Report July 31, 2024

Gaza Strip Food Supply reports, along with Gaza Strip Targeted Analyses, are produced as part of special FEWS NET reporting in response to the Israel-Hamas conflict. Past Food Supply reports and Targeted Analyses are available on [FEWS NET's Gaza page.](#) The next Targeted Analysis will provide an update on acute food insecurity outcomes in Gaza, drawing from this report and other available sources of evidence. FEWS NET does not have an operational presence in Gaza, meaning its approach to monitoring and mapping acute food insecurity in Gaza differs from that in its established [reporting countries](#). The analytical framework and methods of analysis are consistent with project-wide approaches.

Gaza food supply assessment, as of July 31, 2024

Key Messages

- An estimated 79,082–86,925 MT of food entered Gaza in July, compared to an updated estimate of 47,443-61,530 MT in June. The majority of this estimated increase is based on an uptick in commercial cargo amid a decline in humanitarian cargo. Increased approvals of commercial cargo entry into Gaza may not necessarily translate to improved food availability and access within Gaza, particularly given low household purchasing power. Additionally, these figures must be interpreted with an understanding of the data limitations and differences in reporting methodologies.
- The breakdown of food by entry point in July is as follows: 59,799-66,095 MT through Kerem Shalom crossing; 0 MT through Rafah; 175 MT via air drops; 3,635 MT through the U.S. pier (which closed on July 18); and 15,473–17,020 MT through the Erez crossing. Focusing on the most significant entry point – the southern crossing of Kerem Shalom – only 724 humanitarian trucks with food or mixed items entered in July, equating to roughly 5,035-5,566 MT, or only 8 percent of the total food entering through this crossing. The remaining 54,764-60,529 MT was from commercial trucks.
- When looking at a longer time series, the amount of humanitarian food supply entering Gaza through southern crossings in July is at the lowest level observed since October 2023 and only a quarter of the amount entering on average between November and May. Meanwhile, data suggest commercial food supply through these crossings has significantly increased. However, the trend in commercial imports draws on UNRWA data from November to April and Israel's Coordination of Government Activities in the Territories (COGAT) data from May to July, given data gaps limiting the use of a consistent source across months. COGAT and UNRWA data for Kerem Shalom and Rafah differ methodologically: COGAT reports trucks that have been inspected and transferred to the storage and processing area on the Palestinian side of the border, while UNRWA reports trucks they have dispatched from the border area into Gaza. Given significant congestion at crossing points, it is likely a portion of trucks reported by COGAT have not made it further into Gaza.
- Truck entries through Erez crossing show a similar trend: available data suggest between 213 and 315 humanitarian food trucks carrying between 3,430 and 4,977 MT of food entered in July. COGAT is the only source reporting commercial entries through Erez and listed 587 commercial food trucks, carrying an estimated 12,043 MT of food.
- In July, FEWS NET commissioned remote data collection in Gaza on market and trade functioning, collecting information through two different surveys: one that focused on household access to food on markets and reached 339 respondents, and one that focused on market and trade functioning and reached 105 market actors. The results of these surveys show high reliance on both humanitarian food assistance and market purchases, while food prices are high and market actors face significant constraints sourcing food.

Data Challenges for Supply Estimates

The Gaza Strip Food Supply reports aim to aggregate and analyze available data to provide monthly updates on the food supply within Gaza. However, persistent and evolving challenges in data availability, timing, and quality limit the completeness and precision of this analysis. Four main challenges complicate the estimation of food supply in Gaza. First, given limited humanitarian access, disrupted communication networks for transmitting and collecting data, security concerns for local staff, and repeated displacement of humanitarian operations, few agencies are able to collect information in Gaza, limiting market data of all kinds (truck entries, agricultural updates, pricing, etc.). Second, insufficiently detailed data requires FEWS NET and other agencies to make assumptions in order to estimate metric ton (MT) totals for food. Key gaps include a lack of aggregation by food and non-food deliveries, commercial and humanitarian cargo, entry gate, and metric tonnage of food delivered and food type. Third, data sources and availability continue to shift, and analysis and reporting must be adjusted accordingly (e.g., the cessation of UNRWA reporting commercial trucks). Finally, though the calculations produce a reasonable estimate for food *entry* into Gaza, these estimates do not represent the amount of food that is accessible for Gazans. Given security, logistical, and distribution challenges, significant amounts of food remain in storage and staging areas at the crossing points and cannot be considered part of the effective food supply. In addition, there is currently insufficient market monitoring data to assess household financial access to commercial foods, or distribution and sale of foods within Gaza.

FEWS NET continues to work with partners to obtain available data. This report includes data from a phone survey in Gaza conducted for FEWS NET to fill key information gaps.

Supply Overview

An estimated 79,082–86,925 MT of food entered Gaza in July, compared to an estimated 47,443-61,530 MT in June (note that June estimates reflect updated data). The breakdown of food by entry point for July is as follows: between 59,799 MT and 66,095 MT through Kerem Shalom crossing; 0 MT through Rafah; 175 MT via air drops; 3,635 MT through the U.S. pier (which closed in July) and 15,473–17,020 MT through the Erez crossing.

Overland Shipments

Truck Entry via Kerem Shalom and Rafah Crossings

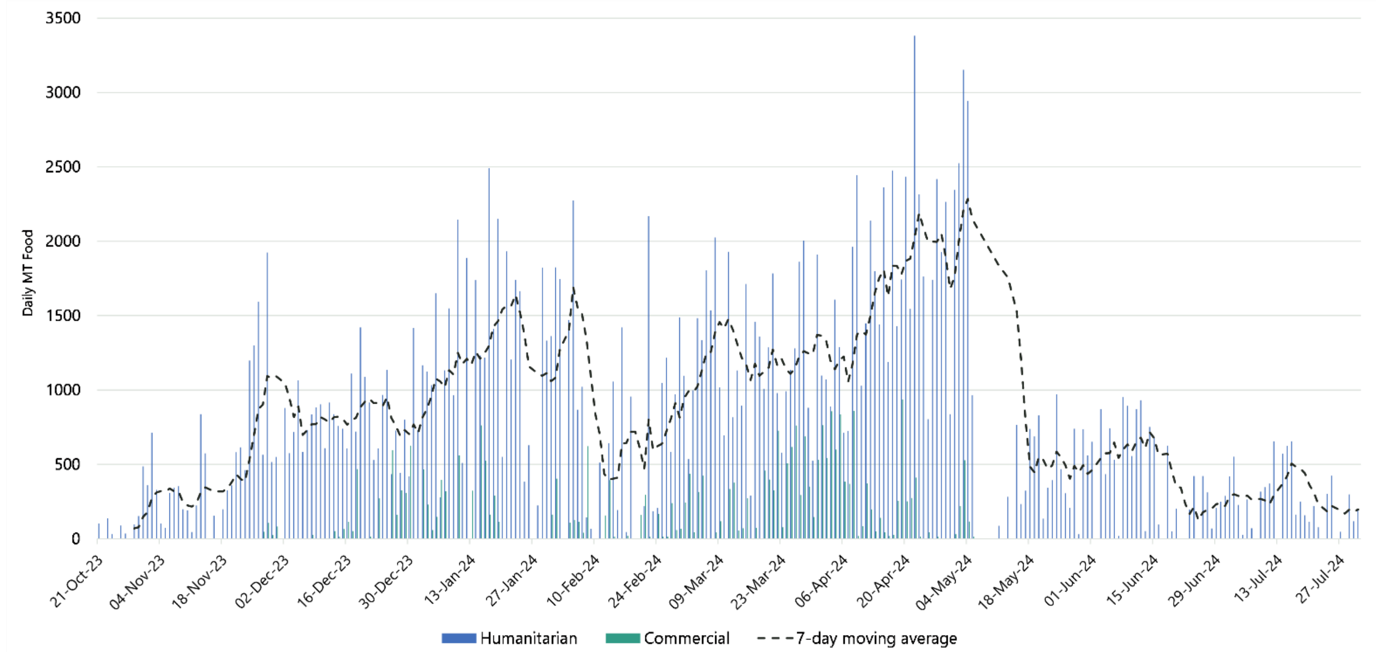
The United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) publishes manifest data for all trucks that enter Gaza through the Kerem Shalom and Rafah crossings in the south (Table 1), where the majority of food and supplies have entered since October 7. Between October 21, 2023 and May 30, 2024, an average of 97 humanitarian and seven commercial trucks[1] entered Gaza each day (food, non-food items, and mixed cargo) through these gates. In June 2024, this average decreased to 42 humanitarian trucks per day, and information on commercial trucks remained unavailable. In July 2024, the average further decreased to 28 humanitarian trucks per day, with no information on commercial trucks. July has had the lowest daily humanitarian truck entries since October 2023. Of the approximately 28,047 humanitarian and known commercial trucks that entered Gaza through these gates since October, roughly 91 percent contained humanitarian aid, while 9 percent transported commercial cargo (Figure 1), though in the last 2.5 months commercial data has not been included in this dataset. Approximately 70 percent of trucks carried food-only items, while the remaining trucks carried either medical supplies, non-food items, or mixed items.

Based on UNRWA data, FEWS NET estimates that humanitarian food trucks entering through the south in July carried an estimated 11 MT of food per truck on average. This is a decrease from the average of 14 MT of food per truck between October 2023 and May 2024. In July, 724 humanitarian trucks carrying food or mixed items entered Gaza through the Kerem Shalom gate, carrying between 5,035–5,566 total MT of food. The Rafah gate remained closed in July for the third

[1] Reporting on commercial trucks is not available after May 5, 2024.

month with no truck entrances, and all reported trucks for the south have entered through Kerem Shalom. As described in previous supply reports since May 2024, the UNRWA data referenced in this section continue to include only humanitarian trucks. While this represents a change in reporting, these data provide the longest-running reliable series available for tracking aid delivery to Gaza.

Figure 1 **Estimated metric tons (MT) of food entering Gaza through Rafah and Kerem Shalom each day and in 7-day rolling averages from UNRWA tracked commercial and humanitarian sources, October 21, 2023 – July 31, 2024 (note commercial truck data not available after May 5, 2024)**



Source: FEWS NET analysis of UNRWA data (tracking of commercial trucks not available after May 5)

Table 1	Humanitarian trucks entering through Kerem Shalom and Rafah since November 2023				
Month	**Food items**	**Medical supplies**	**Mixed items**	**Non-food items**	**Total**
November 2023	1,667	58	21	417	2,509
December 2023	2,144	253	172	673	3,212
January 2024	2,975	250	145	825	4,356
February 2024	1,848	392	164	697	2,859
March 2024	3,631	79	235	1,018	4,987
April 2024	4,204	97	241	1,208	5,660
May 2024	1,674	122	126	360	2,101
June 2024	916	29	38	303	1,282
July 2024	704	4	20	146	874

Source: FEWS NET analysis of UNRWA data (note that estimates may vary from previous reports as UNRWA publishes updated data)

Without UNRWA data on commercial trucks at the southern crossings, another dataset is required to estimate these entries. COGAT has launched a new dashboard that lists truck totals but does not include food truck data disaggregated by entry point (Erez or Kerem Shalom), and FEWS NET does not have access to disaggregated COGAT data for July. COGAT reported total commercial cargo through land crossings (Kerem Shalom and Erez) for July as 81,355 tons; using the aggregate COGAT data, FEWS NET estimated 73 percent (69,765 MT) was food and 27 percent (11,590 MT) was non-food items. FEWS NET used the average 21 MT as the average weight per truck to estimate commercial truck entries via Kerem Shalom through July 2024 (Table 2).

In July, an average of 110 commercial trucks entered daily through Kerem Shalom, according to COGAT's data. This represents an 80 percent increase compared to June 2024 when an average of 61 commercial trucks entered daily, reflecting a two-week pause in commercial entries. Assuming a standard load of 21 MT of food per truck (the average MT of commercial food in June and July), the total amount of food brought in via commercial trucks passing through Kerem Shalom is estimated to be approximately 54,764-60,529 MT.

Combined with the estimates for MT of humanitarian food assistance delivered, this yields an estimate of between 59,799 MT and 66,095 total MT of food through Kerem Shalom crossing in July. Note that data for commercial trucks reported by COGAT for June have been updated (Table 2), as information was only available through June 15 for the previous Food Supply Report. Commercial truck entries for June are now reported at 1,533 food trucks that delivered an estimated 30,583–33,802 MT of food.

Table 2 **Commercial trucks entering through Kerem Shalom and Rafah since November 2023**

Month	Food items	Medical supplies	Mixed items	Non-food items	Total	Reporting Agency
November 2023	30	3	8	2	43	UNRWA
December 2023	240	0	1	2	243	UNRWA
January 2024	325	0	0	10	335	UNRWA
February 2024	223	2	0	21	246	UNRWA
March 2024	631	2	5	93	731	UNRWA
April 2024	621	1	1	95	718	UNRWA
May 2024	2,854	8	41	323	3,226	COGAT
June 2024	1,533	No data	No data	No data	1,533	COGAT
July 2024	2,811	No data	No data	No data	2,811	COGAT

Source: FEWS NET analysis of UNRWA and COGAT data

As noted in previous Supply Reports, COGAT and UNRWA data for Kerem Shalom and Rafah differ methodologically, which affects how the data should be interpreted and has resulted in consistent discrepancies between the datasets. COGAT reports trucks that have been inspected and transferred to the Palestinian side of the border crossing, while UNRWA reports humanitarian trucks they have collected and dispatched from the border into Gaza, as well as humanitarian trucks observed for which the UN is not providing logistical assistance. For a detailed explanation of these divergences, please refer to the June report.

As outlined in previous Supply Reports, these data from both UNRWA and COGAT provide a starting point for developing proxy estimates of MT that have entered the territory – not an exact count – given that several standardized assumptions are required to calculate MT estimates. In addition, significant challenges in transporting food effectively across Gaza given insecurity and access restrictions continue to result in significant food supplies stuck in storage and staging areas. This emphasizes the fact that the amount of food entering Gaza does not equate to the amount available in the effective food supply or being consumed by those in need.

Entry Gates in Northern Gaza

To build an estimate for food entering through Erez gate in July, FEWS NET used three main sources including COGAT, the Logistics Cluster, and the UNRWA dashboards. Given that each data source has limitations, FEWS NET is reporting all three. The available data from UNRWA and the Logistics Cluster are disaggregated by food, non-food, or mixed item trucks, while the COGAT data are not. However, as noted in previous Supply Reports, the UN is no longer able to monitor commercial entries and reports only humanitarian trucks. In addition, the UNRWA data are also incomplete for Erez as they represent only the trucks received at the UNRWA warehouses and include partial cargo from international NGOs, Red

Cross, and other UN agencies, and does not record amounts sent straight into Gaza without using a warehouse. COGAT data are updated daily while the Logistics Cluster and UNRWA dashboards are updated about once a week.

As of August 1, after the update for July 2024, the three data sources have similar estimates for humanitarian entries (both food and non-food) in July, with COGAT estimating 264 trucks, UNRWA 350 trucks, and the Logistics Cluster 337 trucks (268 carrying food items and 69 mixed items) (Table 3). COGAT, the only agency to report commercial entries through Erez, listed 730 total commercial trucks in July, of which 587 and 143 carried food and non-food items, respectively.

Table 3 **Estimated humanitarian and commercial trucks through both Erez gates in July 2024**

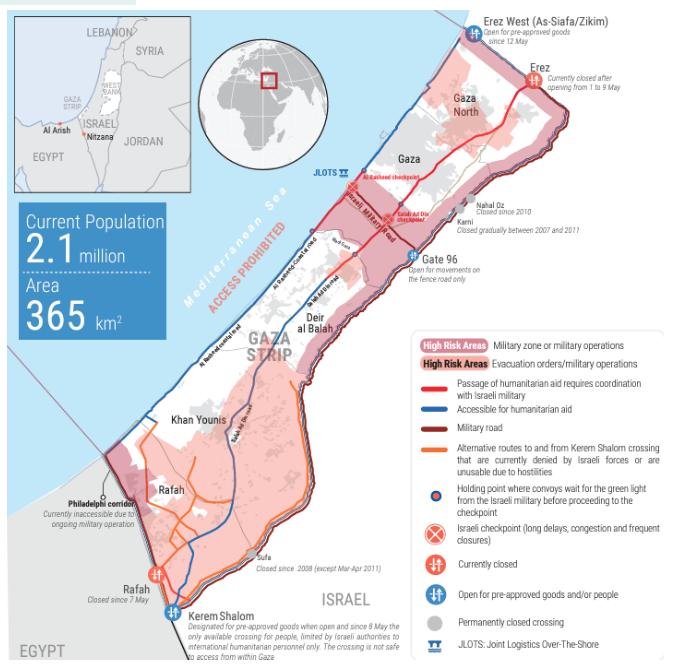
Reporting Agency	Humanitarian		Commercial		Total	
	Food trucks reported	Estimated MT of food	Food trucks reported	Estimated MT of food	Food trucks reported	Estimated MT of food
UNRWA	245	3,430	0	0	245	3,430
Logistics Cluster	315	4,977	0	0	315	4,977
COGAT	213	4,364	587	12,043	800	16,407

Source: FEWS NET analysis of UNRWA, Logistics Cluster, and COGAT data

Where the number of trucks carrying food was not specifically reported (UNRWA and COGAT), FEWS NET estimated total food trucks. FEWS NET estimated 245 humanitarian food trucks from the UNRWA data, and the Logistics Cluster reported 315 food trucks (Table 3). FEWS NET estimated 213 food trucks using the COGAT dashboard data for July (Table 3).

The Logistics Cluster dataset is the only one that included MT of food delivered by food-only trucks, which totaled 4,226 MT. In addition, FEWS NET estimated the MT for the Logistics Cluster mixed cargo trucks using all available July 2024 data to estimate the proportion of food trucks (68 percent) and average of food per truck (16 MT), totaling 751 MT for a combined food total of 4,977 MT (Table 3). To estimate MT of food from the COGAT data, FEWS NET estimated the proportion of food trucks (81 percent) and average of food per truck (21 MT), yielding an estimate of 4,364 MT of humanitarian food. For the UNRWA data, FEWS NET estimated the proportion of food trucks (70 percent) and average of food per truck (14 MT), resulting in a total of 3,430 MT of food (Table 3). The amount of humanitarian food entering through the Erez crossing is estimated to range between 3,430–4,364 MT based on the available data. Combined with the commercial data from COGAT, an estimated total of 15,473–16,619 MT of food entered through Erez crossing in July.

Figure 2 **High-risk areas and road access within Gaza**



Source: UN OCHA, July 31, 2024.

Supply and Distribution Challenges

The situation at border crossings and for access in Gaza has deteriorated since June. While Kerem Shalom was operational (though hindered) for all of June, by late July entry was significantly hampered due to security concerns and logistical challenges (Figure 2). For weeks, the unloading zone at Kerem Shalom has been at full storage capacity, which limits the ability to bring in additional cargo and creates a severe bottleneck in aid delivery. Transporting supplies from the zone has become virtually impossible due to the security situation. In the surrounding areas insecurity, lawlessness, and frequent bombardments persist, making attempts to retrieve and distribute aid extremely dangerous. The Rafah crossing has been closed to the movement of both people and goods since May 7, 2024. With the Rafah crossing still closed, aid continues to enter through other land border crossings and air drops.

Monitoring and reporting capacity

While specific updates on UN monitoring capacity are limited, the overall humanitarian access and reporting situation remains challenging. Frequent attacks on UN convoys and personnel, including incidents on July 21 and 23 involving UNRWA and UNICEF, suggest that maintaining a consistent monitoring presence at border crossings continues to be extremely difficult. This appears to be a continuation of the challenges reported in June when the UN was unable to maintain sufficient staff presence at Kerem Shalom.

The limited ability to monitor cargo along corridors and convoys inside Gaza continues to hamper operations. OCHA and UNRWA currently maintain separate dashboards for incoming truckloads, making it difficult to reconcile the data sources. The UN is working to combine their data into one dashboard. COGAT released a dashboard on food entering Gaza this month. However, the agency has reportedly provided incomplete responses to information requests from human rights organizations and did not answer all questions in Israeli High Court hearings following a petition by six human rights organizations to provide details on restrictive classifications on essential items.

Table 4 **Status of Gaza entry points as of July 31**

Entry point	Status
Erez	**Closed** *Israel's operational plan for the Erez and Erez West gates is to use one at a time.*
Erez West (As-Siafa/Zikim)	**Operational** *Israel's operational plan for the Erez and Erez West gates is to use only one at a time. COGAT data show a 30 percent increase in the number of food trucks entering through this crossing daily in July (26 trucks/day) compared to June (20 trucks/day).*
Rafah	**Closed** *Closed for goods shipments since May 7.*
Kerem Shalom	**Operational, but severely constrained** *Effective distribution is not possible for most humanitarian cargo due to insecurity. Loading area completely full.*
Israeli Fence Road (Gate 96)	**Limited Use** *Limited humanitarian convoys with pre-approved drivers, In July, the road was used to transport valuable non-food items as it is more secure.*
JLOTS (U.S.-built floating pier)	**Closed** *The pier officially closed on July 18, marking the end of its operations.*
Air drops	**Limited Use**

Security conditions

Poor security conditions continue to pose significant challenges for aid delivery, with conditions in July deteriorating from the previous month. While in June there were reports of reduced truck deliveries and major security incidents, in July, the breakdown of public order and safety has made it "almost impossible to ensure goods effectively cross into Gaza via Kerem Shalom," according to the July 29 Humanitarian Snapshot published by a consortium of 23 NGOs working in Gaza.

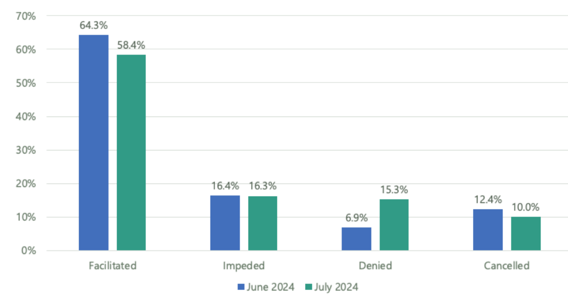
The absence of functioning governance structures has led to a breakdown in public order and safety, increasing the likelihood of looting of humanitarian convoys.

Supply backlog and congestion

The backlog and congestion at border crossings have reached critical levels. As of late July, the unloading zone at Kerem Shalom has been full for weeks, with collection from the zone impossible due to insecurity (Table 4). Over 1,000 truckloads of aid are waiting for collection on the Gaza side of the Kerem Shalom crossing. The congestion is not limited to the Kerem Shalom crossing, with 1,464 UN and international NGO trucks reportedly waiting in Al Arish to be dispatched into Gaza as of July 24.

Fuel shortages exacerbate the situation. Between July 1-21, only about 103,000 liters of fuel entered Gaza per day, which is a quarter of the estimated 400,000 liters needed for daily humanitarian activities. Israeli bombardment has also damaged large portions of aid organizations' infrastructure, reducing their capacity to distribute food due to the destruction of, or constrained access to, storage and distribution centers, as well as impassable roads, lack of fuel, and insufficient truck availability in some areas of Gaza. These challenges have led to a situation in which food is often stuck in staging areas on the Gaza side for days or weeks. As a result, Mercy Corps reported that they have not received a delivery in more than two months, as they are unable to safely retrieve food from border crossings. Similarly, the Norwegian Refugee Council (NRC) reports that they have not received any food at their warehouse since May 3.

Figure 3 **OCHA July Mission Access Statistics**



Definitions for Coordinated Missions:

Facilitated	The mission is approved by the Israeli Coordination and Liaison Administration (CLA) and proceeded without any impediments.
Cancelled	The mission is canceled by the humanitarian organization.
Impeded	The mission is impeded by the Israeli army and is not able to achieve its objectives fully or partly.
Denied	The mission is denied by CLA.

Source: FEWS NET with data from UN OCHA

Coordination difficulties continue to pose significant challenges for aid organizations operating in Gaza. In July, the process of coordinating movements with the Israeli military resulted in mixed outcomes for humanitarian assistance missions (Figure 3). While more than half of the planned missions were able to proceed, a substantial number faced obstacles or were unable to be carried out. Out of 522 total missions in July, 305 (58.4 percent) were successfully facilitated, allowing aid to reach its intended destinations. However, the remaining 41.6 percent of missions were disrupted: 85 (16.3 percent) were impeded, facing delays or complications that affected their effectiveness; 80 (15.3 percent) were denied; and 52 (10 percent) had to be canceled due to various operational or security concerns.

Air drops

Air dropped food is a tool generally used for supplying hard-to-reach populations in defined geographic areas because of the cost and limited weight that can be delivered, as well as the inability to control and precisely target distributions to specific households or groups. Air drops have been deployed mostly to supply northern Gaza, since April. In July, five airdrops over southern Gaza and delivered approximately 175 MT of food, a decrease from June’s seven airdrops which delivered about 220 MT (Table 5).

Table 5 **Publicly reported air drops completed in April to June**

Month	Total air drops this month	Total estimated MT of food dropped
April	44	2,004
May	19	820
June	7	220
Total	**70**	**3,044**

Source: FEWS NET analysis of publicly reported air drops

Jordan, Saudi Arabia, and Egypt jointly coordinated all five airdrops over the course of July (Table 6). None of these reports specified the MT of assistance or food delivered. As explained in the previous Supply Report, when MT of food is not reported, FEWS NET uses 50 MT of total aid delivered (assumed to include 70 percent food) as a reasonable estimate based on air drops in previous months. In July, COGAT began reporting air drops in an online dashboard. This dashboard lists four air drops through July 15, which is broadly in line with FEWS NET's analysis. COGAT's dashboard reported that a total of 103 MT of aid (not specified food or non-food) were air dropped. The dashboard does not offer a detailed breakdown of the contents (food vs non-food).

Table 6 **Publicly reported air drops completed in July**

Week	Total air drops this week	Total estimated MT of food dropped
July 1 – 7, 2024	1	35
July 8 – 14, 2024	2	70
July 15 – 21, 2024	1	35
July 22 – 28, 2024	1	35
July 29 – 31, 2024	0	0
TOTAL	**5**	**175**

Source: FEWS NET analysis of publicly reported air drops

Direct Maritime Corridors

The U.S. military announced on July 18 that it had completed its support for the Joint Logistics Over-the-Shore (JLOTS) pier and that between May 17 and the end of July, the pier facilitated the delivery of nearly 20 million pounds (9,072 MT) of aid. Partners reported food delivered from the pier in July. However, with no reports of additional maritime deliveries, it is unclear if this is from new deliveries or food that had been delivered in previous months and was being picked up from pier storage. For July, FEWS NET estimates that up to approximately 3,635 MT of food could have been delivered to Gaza from the pier, and this estimate brings the total to 9,221 MT over the course of the pier's operations (Table 7).

The pier was intended to better facilitate the delivery of food to Gaza's residents; however, it faced significant challenges and was severely impacted by harsh weather and security threats, limiting its functionality to just 20 days over the course of three months. Challenges with the pier have been discussed in greater detail in earlier Supply Reports.

Agriculture

There were no significant reports or new data sources on the agricultural situation in Gaza in July. The agricultural sector remains severely impacted by ongoing hostilities, causing a near-total disruption of local food production. The Food and Agriculture Organization (FAO), in collaboration with its partners, continues to provide emergency assistance including restricted cash and voucher transfers, multi-purpose cash transfers, and support packages consisting of raw materials and light tools, aimed at supporting those in the agricultural sector. However, the ongoing lack of critical inputs, such as seeds and fertilizers, poses a significant barrier to reviving food production in Gaza.

As noted in previous reports, though data on local production are unavailable, it can be reasonably inferred that locally produced foods are no longer making a substantial contribution to the overall food supply.

Table 7 **Estimated maritime humanitarian assistance deliveries May-July, 2024**

Month	Estimated MT of assistance *(food and non-food)*	Estimated MT of food *(Assumed 90 percent of assistance)*
May	1,000 MT	900 MT
June	5,206	4,686
July	4,039	3,635
TOTAL	**10,245 MT**	**9,221 MT**

Source: FEWS NET analysis of U.S. CENTCOM press releases and OCHA updates

Markets in Gaza

Market Functionality

Market functionality varied across the governorates in July. Compared to June, there was a slight improvement in both food availability and variety in Deir Al-Balah and Khan Younis markets, while food availability appears to have deteriorated in the other governorates, with food types limited to cereals and canned foods. Additionally, high food prices and liquidity challenges persist. The market structure is also changing with the emergence of "thieves markets" where stolen goods are sold. Despite the intermittent availability of fuel, 12 out of 18 bakeries remained operational as of July 29, including in Gaza City (four), North Gaza (two), and Deir Al-Balah (six), while all five bakeries located in Rafah remained closed due to the poor security situation. The fuel problem was evident between July 8-19, during which shortages led to the temporary closing of two bakeries in Gaza City. The economic crisis in Gaza, with inflation reaching over 153 percent year-on-year in April 2024, has severely impacted purchasing power.

In July 2024, FEWS NET commissioned two market and trade surveys in Gaza with the goal of remotely gathering additional insight into the current market situation. The surveys targeted households and market actors in separate surveys across all Gaza governorates (combining North Gaza and Gaza governorates into one analysis unit), using Computer Assisted Telephone Interviews (CATI). The surveys took place between July 11-24, interviewing a total of 339 households and 105 market actors (Table 8). Given the low sample size of market actors and among households in Rafah, these results are taken with careful consideration of their limitations.

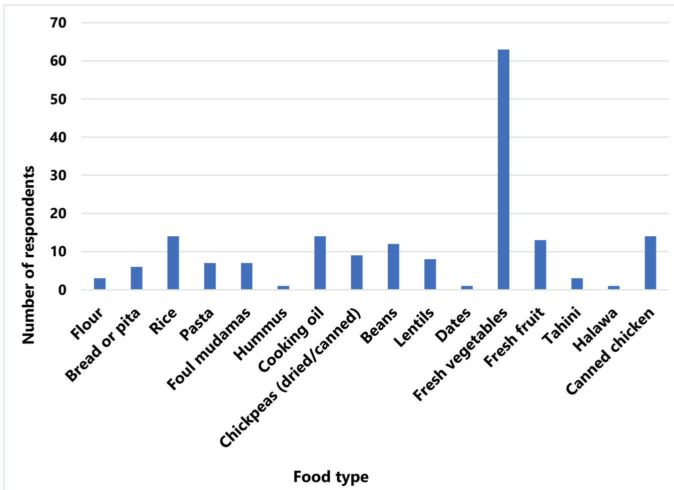
Table 8 **Number of respondents by governorate and survey type**

Survey Type	North Gaza and Gaza	Deir Al-Balah	Khan Younis	Rafah	Total
Household	103	101	100	35	339
Market actors	18	53	32	2	105

Source: FEWS NET

Rampant insecurity, damaged roads, a disrupted distribution system, high transport costs, and liquidity shortages continued to constrain market functioning, particularly in North Gaza and Gaza governorates. According to the FEWS NET survey results for July 2024, market purchases and humanitarian assistance were the main sources of food for respondents to the household survey. Among those who purchased from the market, there was some diversity in products purchased, as shown by the example of Khan Younis (Figure 4). A similar level of diversity of products purchased by respondents was reported in Deir Al-Balah and Gaza and North Gaza.

Figure 4 **Among respondents who personally made a market purchase in the past seven days (n=78) in Khan Younis, the number who purchased each food type**



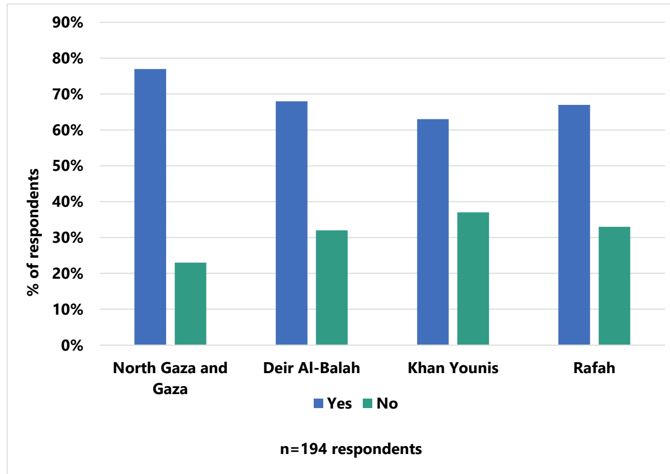
Source: FEWS NET

However, the large majority – around 70 percent – of household-survey respondents reported facing challenges physically accessing markets, with the highest rate reported in North Gaza and Gaza governorates (Figure 5). The majority of these respondents (63 percent) also reported that a deterioration in the security situation over the past seven days had affected their ability to go to the market to purchase food. A significant portion of household respondents (approximately 45 percent in North Gaza and Gaza, 35 percent in Deir Al-Balah, and 37 percent in Khan Younis) also reported spending four to 10 hours a day (in the last seven days) searching for or purchasing food.

Among household respondents who personally made a market purchase over the past seven days, over half of them in Deir Al-Balah (47 out of 83; 57 percent) and Khan Younis (40 out of 78; 51 percent) reported that food availability had improved in markets over this time. Conversely, among these respondents in North Gaza and Gaza, the majority (37 out of 60; 62 percent) indicated food availability in the market deteriorated. Among respondents who made a market purchase over the past 7 days (194 of 339 total respondents), a large proportion (164 out of 194; 85 percent) indicated seeing food available in the market that was labeled as humanitarian aid.

Within FEWS NET's market actor surveys, a fair number of market actors were reached in Deir Al-Balah (53 respondents) and Khan Younis (32 respondents), though these figures are still lower than the targeted sample size of 100. Very few market actors were reached in North Gaza and Gaza governorates (18 respondents) and Rafah (2 respondents), likely an indication of both low market activity and poor communication connectivity. Responding market actors reported continuing to face a challenging operating environment that limits their ability to source and store supplies. In all governorates, 71 percent indicated that they had trouble sourcing food to sell: North Gaza and Gaza (68 percent; 13 respondents), Khan Younis (83 percent; 24 respondents), and Rafah (100 percent; 2 respondents). Overall, 78 percent of market actors indicated that they did not store food supplies to sell in subsequent days, primarily due to a lack of a safe place to store food and high storage charges.

Figure 5 **Response to poll question "Did you face any challenges physically accessing the market to buy food?", by governorate**



Source: FEWS NET

Prices

The July 2024 price information update from the Palestinian Central Bureau of Statistics is not yet available. According to the FEWS NET surveys, the price traders paid to purchase food commodities generally increased across the governorates in the last seven days. According to households surveyed by FEWS NET across Gaza, 47 percent (117 respondents) reported an increase in prices over the past 7 days, while 29 percent (72 respondents) reported a decrease, and 22 percent (56 respondents) reported stability. A relatively larger proportion of household respondents in Gaza and North Gaza and Rafah governorates, 67 percent (40 respondents) and 64 percent (18 respondents), respectively, reported an increase. Due to the continued market volatility, individual households faced a wide range of prices for essential commodities across Gaza. A bag of wheat flour was reported by households in FEWS NET's survey as selling for approximately 20-30 Shekels in Gaza and North Gaza, 25 Shekels in Deir Al-Balah, and 20 Shekels in Khan Younis. Similarly, the price of a kilogram of rice ranged between 2-80 Shekels, illustrating very high price volatility across all the governorates. Gaza and North Gaza also recorded very high rice price volatility combined with high minimum prices, ranging between 22-65 Shekels. The prices of a liter of cooking oil were lowest in Deir Al-Balah (1-3 Shekels) and Khan Younis (1-7 Shekels), and highest in Gaza and North Gaza (30-60 Shekels).

Annex A: Market Functionality by Market Basin

Market Basin	Status	Change since June	Key Issues
Gaza City	Negligible formal market function, predominantly informal markets	Deteriorated	• Many food commodities supplied in the market are labeled for humanitarian distribution. • Most households continue to face physical challenges accessing markets due to deterioration in the security situation and thus spend many hours searching for food to purchase. • Most households indicate that food availability and number of vendors selling food in the market have generally stayed the same or deteriorated during the month. • A majority of households report that food prices deteriorated compared to last month. • Four bakeries remain operational, though two were closed for nearly two weeks in July.
Khan Younis	Severely disrupted and unstable	Slight improvement	• Many food commodities supplied in the market are labeled for humanitarian distribution, though the markets are also fairly supplied with commercial food. Therefore, there is some improvement in the availability of diverse food. • For most households, the number of food vendors and the food availability has either stayed the same or improved due to a slight reduction in insecurity. • Food prices generally stayed the same or slightly improved even though traders still face challenges in sourcing food commodities to sell.
Deir Al-Balah	Severely disrupted and unstable	Slight improvement	• Many food commodities supplied in the market are labeled for humanitarian distribution, and food availability has stayed the same or improved for most households. • The number of vendors selling food and the physical access to food vendors has stayed the same or improved for most households due to the slight improvement in the security situation. • Food prices have stayed the same or improved for the majority of households.
Rafah	Severely disrupted to collapsed	No change	• The security situation for going to the market to purchase food has generally stayed the same or deteriorated for the majority of households. • Physical access to food vendors has generally stayed the same or deteriorated for the majority of households despite the slight improvement in the number of vendors selling food. • Food prices remain high and have generally deteriorated for the majority of households. • All five bakeries remain closed.

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