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Food Security in the West Bank and Gaza Strip
Rapid Qualitative Assessment Report

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SUBMITTED TO:

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EXECUTIVE SUMMARY

This report presents the findings of a rapid qualitative assessment of the food security conditions in the West Bank and Gaza Strip, which was commissioned by the United Nations Relief and Works Agency (UNRWA), World Food Programme (WFP) and the Food and Agriculture Organizations of the United Nations (FAO), and conducted by Al-Sahel for Institutional Development and Communications. The assessment was carried out between 23 March – 28 April 2008, and based on an integrated, participatory approach that involved a rapid literature review; more than 350 in-depth key-informant interviews in 28 localities in the West Bank and Gaza Strip representing the various agro-ecological zones and administrative classifications (i.e. urban, rural and refugee camps); and, seven focus group discussions with farmers, registered refugees in refugee camps; and PA employees. The assessment focused on: (i) measuring the evolution of food patterns; (ii) evaluating consumers and traders (including supply chain) coping mechanisms in light of global and local market price increase as well as climatic factors (dry spells and frost); (iii) assess livelihoods' adaptation to the closure/high prices in West Bank and to import/export restrictions and renewed military incursion in Gaza Strip; and, (iv) assess the role of assistance in household coping mechanisms. The following paragraphs present a brief summary of the key assessment findings.

Availability of Food

Market availability

On the balance, food is generally available in the WBGS market, with certain non-staple foods being unavailable in the Gaza Strip due to the restrictions on imports and the closure of the three commercial crossings imposed by the GoI in the aftermath of the June 2007 events. Both basic and non-basic food items are generally more available in the Gaza market nowadays than four months ago due to more systematic entry of basic foods through Kerem Shalom, and due to fact that most wholesalers and retailers were able to restock their shelves when the borders with Egypt were forcibly opened for a period of ten days in late January 2008. What is noteworthy, however, is the reduced, and sometimes very limited, stock of several food items at both the retail and wholesale levels in the WBGS, which is largely caused by decreasing purchasing power among consumers and –in part- due to wholesalers/retailers financial inability to maintain the usual stock levels in the wake of the rapid price increases of several goods in which they trade. Anecdotal evidence suggests that smaller retailers with limited financial capabilities have reduced their carrying capacity of flour and other large-ticket items in recent months.

Availability at the household level

Anecdotal evidence suggests that the level of availability of food at the household level is continuously decreasing, owing to reduced incomes, loss of purchasing power and increased food commodity prices. The majority of households interviewed reported having reduced stocks of food compared to six months ago, despite increasing the percentage of their income spent on food and substituting high-quality food with lower-quality, cheaper foods. A large proportion of the interviewed households reported that the food stocks they have are largely limited to what they receive from emergency and social welfare programs. At the same time, many households visited had enough stock of food only for a day or two. The assessment has shown that the households of the chronically unemployed who do not receive any form of regular cash or food assistance have much less food stocks than other households. Of these, refugee households in the West Bank seemed to be the worst off as most of them reported not having any food stocks beyond what they need for a day or two.

Availability of food through social access
The assessment has shown that social access to food, thereby availability of food through food aid programs, has been declining in recent months due to several factors. While food assistance through UNRWA and WFP continues to be an important source of food for a large proportion of the population (1.8 million), the ability of both organizations to maintain their caseloads and levels of assistance began eroding in late 2007 as a result of reduced donor funding (particularly for WFP), and increased commodity prices (especially wheat four) and transportation cost. The cost of WFP's two-year Protracted Relief and Recovery Operation (PRRO) has risen to $162.4 million (an increase of $55 million in just six month, roughly +50% of its initial cost) as a result of the price and transportation cost increases, which made it impossible for WFP to target the same number of beneficiaries as it had originally planned. To top it up, until April 2008, WFP received only 30 percent of the funds it needs to implement the full scale of the PRRO, which envisaged targeting a slightly under 650,000 people. Due to much of the same reasons and despite having higher than usual funding for its core operations in 2007 and 2008, UNRWA has been unable to maintain its emergency food assistance program in the West Bank since late 2007.

Local charitable organizations and non-governmental organizations that administer food and cash distribution and employment generation programs reported decreased funding for their programs during last year, as well as reduced caseload. Organizations in the Gaza Strip seemed to be more hard hit by the limited funding as they also have to deal with the added restrictions of imports and bank restrictions on cash transfers to Gaza (and particularly to Islamic charities).

Access to Food
Qualitative data gathered through this assessment confirm that economic access to food continues to be the most significant food security concern in WBGS. Anecdotal evidence suggests that the recent resumption of payment of PA employees salaries could not offset the effects the food price increases, the continued closure of Gaza, the internal closure of the West Bank and the natural calamities, which have created a kind of "market-induced shock" to vulnerable households in recent months.

The assessment has shown that there are increasing numbers of Palestinians who are scrambling to put enough food on their tables as a direct result of food price increases. The rapid increase in food prices are prohibiting their purchase by most Palestinian households. Particularly affected by the price increases, according to interviewed retailers, are the households of the chronically unemployed who have no regular source of income and/or assistance. Increasingly more households are buying cheaper foods and reducing the quantities of foods they purchase.

Food prices
The diverging food price levels between the West Bank and Gaza Strip did not seem to translate to noticeably different food consumption patterns among the interviewed households in both regions. The possibility of buying food on sale from neighborhood retail outlets, and the fact that several households have reportedly reduced consumption to a minimum could possibly explain why different consumption patterns have not emerged between the two regions.

Interviewed PA employees claimed their purchasing power has not improved significantly with the resumption of salary payments due to the high levels of debt they have accumulated during the transitory period in which their salaries were suspended. PA in employees in Gaza were even less positively affected by the resumption of salary payments than their West Bank peers as the increasing unemployment resulting from the closure imposed on Gaza has put increasing financial burdens on them to support more dependents. This may explain why the assessment team did not find that PA employees' households –particularly those at the low end of the pay scale- are significantly better off than other households visited in terms of their food consumption and/or ability to purchase various foods.

The closure of the Gaza Strip

The continued restrictions on imports and the freeze on exports into and from the Gaza Strip remain the main reasons for reduced livelihoods and high unemployment rates in the Gaza Strip. The lack of raw materials and trade opportunities have forced the overwhelming majority of private sector establishments that provide jobs to over 50 percent of the population in the Gaza strip to either completely shut down or significantly reduce their operating capacity. It is estimated that more than 75,000 workers out of the total 110,000 workers employed by the Gazan private sector have been laid off. Anecdotal evidence gathered in the course of this assessment suggests that an additional 10,000-15,000 workers in the services sector might be subject to lay-offs within a few months as a result of decreased economic activity.

Agriculture, which has been a sector of employment of last resort to many unemployed Gazans, has also been severely hit by the loss of export opportunities, lack of and increased prices of agricultural inputs, increased restrictions on fishing, and fuel shortages.

At the time of conducting this assessment, fuel was a very scarce commodity in the Gaza market, and power outages were very frequent. Prices of gasoline, cooking gas and diesel had tripled due to limited supply. As a result of the fuel crisis, UNRWA was forced to halt its food provision activities to some 650,000 refugees in Gaza for about a week until an agreement was reached with Palestinian Gas Stations Owners' Association to suspend its strike, which it began in protest of reduced fuel supply, and resume the provision of fuel to UNRWA. WFP's food distribution to some 127,000 people were similarly halted during the same period. The ability of UNRWA, WFP and other UN agencies to maintain their operations in this situation, however, remains largely instable due to the uncertainty of fuel supply. In field visits, the following was noted in relation to the limited availability of fuel in Gaza:

- The prices of most vegetables has increased as a result of the increase cost of irrigation from the diesel-operated agricultural wells, further decreasing the purchasing power of Gazan households.

- A large number of households were unable to purchase cooking gas and resorted to consuming more dry, and uncooked foods, thus further limiting the short menu of food available to them.

- The continuation of the fuel shortages will inevitably drive an increase in the price of flour produced by the Gaza mills, which will in turn cause an increase in the prices of bread produced in bakeries.

- The increasing prices of diesel and the limited availability thereof have forced several farmers to reduce their areas of their lands under cultivation, or let part of their crops perish because they were unable to provide them with the needed irrigation.

- The scarcity of fuel has made fishing expensive and unviable. Market visits revealed that sardines were scarce and expensive, although it was the height of the sardine season when the market visits were conducted. Exacerbating the problem is the discharge of sewage into the sea due to lack of sufficient quantities of fuel to operate the sewage treatment plants in the Gaza Strip. While, the effects of the discharge of sewage into the sea in Gaza have not yet been studied, there are sufficient visible signs suggesting that sea water has become polluted by sewage, which has a strong potential to introduce e-coli bacteria that can cause gastroenteritis and urinary tract infections. Fishermen interviewed near the sewage outlet in the area of Beach Camp reported that the sewage discharge has killed most sea life in the immediate vicinity, and seriously threatens the sustainability of the fishery industry.

Food Utilization

The assessment has not revealed any noticeable differences between food utilization at the household level between the West Bank and Gaza Strip. It also did not reveal any noticeable differences between refugee and non-refugee households in this regard. Moreover, the assessment has shown that proper food utilization at the household level in the WBGS is being largely constrained by the households' economic inability to provide nutritious, balanced food for the household members. Most households rely on cheap and limited varieties of food, mostly legumes and bread that lack the essential micro-nutrients needed for maintaining a healthy status. Despite the general tendency by parents interviewed to eat less to provide more food for their children, children are not being provided with the nutrition they need for their development due to their parents' inability to secure a balanced diet. This is most likely the reason why interviewed health professionals in the visited communities reported observing increasing numbers of children (9 – 36 months) and pregnant women who are underweight and have symptoms of anemia.

Coping Strategies

The assessment has shown that households are relying of a variety of coping mechanisms to maintain their survival, including: decreasing the quality and quantity of food consumed (relying on one meal per day, purchasing lower-quality foods, decreasing consumption of fruits, vegetables and fresh meats/reliance on very limited varieties of food, and reducing the amounts of food purchased), substituting fresh meat with cheaper and lower value frozen meat, seeking food assistance, and scavenging for food, living on account, deferring the payment of utility bills, sale of assets, and decreasing expenditure on health and education. However, the assessment has also shown that most of these coping mechanisms have been either been completely or severely exhausted by households in recent months. Anecdotal evidence strongly suggests that the overwhelming majority of households have sold all of their productive and unproductive assets, not paid their utility bills in several years, tapped all potential debtors, and reduced their food consumption to the bare minimum; i.e. they can not further reduce expenditure on or consumption of food.

Conclusion and Recommendations

The food security situation for the Palestinian population remains poor and food insecurity is becoming a real threat to a growing proportion of the population. The tightening of restrictions on the free movement of people and goods in the West Bank and Gaza Strip; the unprecedented and prolonged closure of the Gaza Strip; the rapidly increasing prices of food; the declining productivity of the agricultural sector in both the West Bank and Gaza Strip as a result of natural calamities and Israeli measures; and, the inability of humanitarian organizations to meet the increasing demand for and cost of humanitarian assistance have, combined, been leading to the erosion of the livelihoods of the Palestinian population.

Accordingly, to stop and reverse the trend towards food insecurity, actions need to be taken to improve economic and social access to food through, first, by lifting the restrictions on imports and exports imposed on the Gaza Strip; increasing job creation activities in both the West Bank and Gaza Strip; and lifting the internal and external closure of the West Bank. Given the fact that it will take a long period of time to reverse the prolonged economic decline and reduce unemployment to its pre-Intifada levels, it is of utmost importance that social access to food is increased. This is best done by ensuring continued financial support to UNRWA and WFP's regular and emergency operations, including the 2008 CAP, to enable these organizations to reach out for those who are in need of assistance as well as to ensure that they get their full entitlements.

I. INTRODUCTION

A. Overview of the Socio-Economic Conditions in the WBGS

Since the outbreak of Al-Aqsa Intifida in 2000, the state of the Palestinian economy has been subject to unprecedented levels of economic decline and structural damage as a result of the restrictions imposed by the Government of Israel (GoI) on the movement of Palestinians and Palestinian commerce, as well as repeated Israeli destruction of physical assets during regular military incursions into Palestinian communities in the West Bank and Gaza Strip. During the period 1999-2007 - punctuated by a very modest recovery during 2003-2005 driven by increased public spending, remittances and international aid- Gross Domestic Product (GDP) per capita declined by about half.[1]

The international embargo on the Palestinian Authority (PA) following Hamas' victory in the Palestinian Legislative Council elections of January 2006 aggravated further the protracted economic decline with the PA unable to meet most of its obligations and deliver services. Approximately 160,000 public sector employees only received 45 percent of their salaries in 2006, resulting in reduced household income for more than quarter of the population. By June 2007, arrears related to unpaid salaries and pension contributions of public sector employees, and goods and services supplied by the private sector, accumulated to levels exceeding US$ 1.3 billion.[2] The cost of 'net lending' in the form of government subsidies also increased to more than US$400 million by mid 2007[3], primarily due to difficulties in collecting fees due from consumers for the provision of electricity and water utilities, which put additional strain on PA institutions in delivering services and meeting its financial obligations.

According to data from the Palestinian Central Bureau of Statistics (PCBS), 56 percent of the Palestinians were living in official income poverty in 2006 (49.1 percent in the West Bank and 79.3 percent in the Gaza Strip), an increase of nine percent from the previous year. A whopping 44.1 percent of the population was living in official consumption poverty, unable to meet basic subsistence needs.[4] More significant is the fact that the consumption data indicates that 18.5 percent of the Palestinian households were suffering from deep poverty in 2006 (13.0 percent in the West Bank and 34.8 percent in Gaza Strip), while 44.1 percent were suffering from deep poverty in the same year (49.1 percent in the West Bank and 66.7 percent in Gaza Strip). Both, official an deep consumption poverty rates among refugee households living refugee camps stood at 38.6 and 25.6 percent respectively in 2006, substantially higher than rates among urban and rural households during the same period.

With Hamas' takeover of Gaza in June 2007 following months of inter-factional confrontations, the economic conditions in Gaza worsened significantly as a result of the intensification of the closure imposed by the GoI on Gaza to unprecedented levels, which included a systemic closure of all major crossing points, restrictions on the entry of imports to all-but-humanitarian goods, prohibition on exports and a substantial reduction in fuel supply. Karni, the main passage for commercial traffic into and out of the Gaza Strip, has been closed since 12 June 2007, with the exception of a few days on which one of its conveyor belts was opened for grain and animal feed. The makeshift crossings of Sufa and Kerem Shalom have been used as alternatives to transfer humanitarian supplies, but they have proven highly inadequate as they do not have the capacity to process containers in time to meet the basic needs of the Gazan population.

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[1] PCBS, National Accounts Data.
[2] MoP, *Building a Palestinian State: Towards Peace and Prosperity*, December 2007.
[3] Ibid.
[4] PCBS, Poverty in the Palestinian Territory, August 2006.

These measures have been causing a systematic deterioration in the living conditions of the already vulnerable Gazan population, and causing what can be classified as an irrecoverable damage to the fragile, export-driven and input-dependent private sector which was providing employment to some 113,000 individuals in mid 2007.[5] The Palestinian Trade Center (PalTrade) and the Palestinian Federation of Industries (PFI) report that 95 percent of the factories in the Gaza Strip had closed due to inability to obtain the necessary raw materials and/or export as a result of the closure, laying off some 32,000 employees.

The lifting of the international embargo and the resumption of budget support to the PA following the June 2007 events in Gaza lead to improvements in the fiscal situation of the PA, which has enabled it to resume the payment of salaries and salary arrears to its employees thus allowing them to reverse the difficult conditions they had endured for more than eighteen months. Moreover, the lifting of the international embargo lead to a 0.7 percent increase in the GDP in 2007 from the previous year. This positive change, however, did not help much in alleviating the general poor socio-economic conditions in the oPt as the GoI stepped up its movement restrictions, siege on Gaza, military operations in the West Bank and Gaza Strip, and construction of the Separation Barrier in the West Bank.

B. Assessment Objectives and Methodology

Against this backdrop, with unemployment in the oPt reaching 28.8 percent at the end of 2007 (25.9 percent in the West Bank and 35.3 percent in the Gaza Strip)[6] and increasing concern over food security, the United Nations' Food and Agriculture Organization (FAO), World Food Programme (WFP) and the United Nations Relief and Works Agency (UNRWA) jointly commissioned Al-Sahel Company for Institutional Development (Al-Sahel) to conduct a rapid qualitative and quantitative assessment to: (i) measure the evolution of the food patterns; (ii) evaluate consumers and traders (including supply chain) coping mechanisms in light of global and local market price increase as well as climatic factors (dry spells and frost); (iii) assess livelihoods' adaptation to the closure/high prices in West Bank and to import/export restrictions and renewed military incursion in Gaza Strip; and, (iv) assess the role of assistance in household coping mechanisms. More specifically, the qualitative and quantitative assessment was intended to:

- Assess the changes in food patterns, coping mechanism (including assistance), market functionality and livelihoods in the aftermath of the recent escalation in violence and extended economic downturn in Gaza Strip;

- Gauge the resilience of West Bank population (including the role and contribution of assistance) in the wake of prolonged closure regime, recent climatic shocks (dry spells and frost) as well as market induced shocks (high cereal, fodder and water prices) which are hampering the traditional farming and herding livelihoods; and,

- Profile population groups most vulnerable to the above risks, considering their resilience and level of exposure to risk.

This report presents the findings of the qualitative assessment, which was based on an integrated, participatory approach involving the following:

[5] PCBS, Labor Force Survey, 2nd Quarter 2007, September 2007.
[6] PCBS, Labor Force Survey, 4th Quarter 2007, March 2008.

- Literature Review: A rapid review of the most recent reports covering the humanitarian, food security, nutritional status, economic and market conditions in the West Bank and Gaza Strip was carried out with the purpose of formulating and understanding of the socio-economic and humanitarian conditions in the oPt that may have had an impact on the food security conditions in the oPt in recent months. This review was an essential starting point for the formulation of the key questions the assessment was seeking to answer through various stakeholders.

- In-depth, Semi-Structured Interviews: Some 350 in-depth, semi-structured interviews were conducted with the various key informants in 28 localities in the West Bank and Gaza Strip. In each of the communities visited, to the extent possible, interviews were held with: municipalities, retailers and wholesalers; petty traders; fisherfolk; cash-crop farmers; poultry farmers; livestock farmers; households of chronically unemployed individuals; households of PA employees; households classified as Social Hardship Cases by UNRWA and MoSA; and, more generally, poor households. Also, interviews were held with municipalities and village councils; Camp Services Officers; charitable organizations; and health providers in the visited communities. Central interviews were also conducted with agricultural cooperatives and associations; Nablus vegetables wholesale market; the Ministries of Agriculture and Social Affairs; PalTrade and PFI; and, several factory owners in Gaza. Annex 1 includes a list of the people interviewed within the framework of the assessment.

  In selecting the localities to be visited, the following parameters were taken into consideration:
    - Regional representation (West Bank and Gaza Strip).
    - Representation of Agro-ecological zones.
    - Representation of different types of administrative divisions/type of localities (Urban, Rural, and Refugee Camp).
    - Localities near/affect by the Wall.
    - Localities most vulnerable to/affected by the Israeli closure regime and incursions.
    - Localities on which food security related data is available (for comparative reasons).
    - Localities where vulnerable livelihood groups identified in previous studies are known to reside.

  Accordingly, and based on discussions with FAO, UNRWA and WFP, 12 localities in the Gaza Strip and 16 localities in the West Bank were visited. The following table shows the distribution of these communities according to the agro-ecological zones and administrative classification.

Table 1: Localities visited according to agro-ecological zone and administrative classification

AE Zone	Urban Areas	Rural Areas	Refugee Camps	Total
Coastal Zone	Beit Hanoun Gaza (Zarqa) Rafah	Khuza'a Al-Mawasi Al-Birka Swedish Village	Beach (Ash'shate') Deir Al-Balah Yibna Khanyounis	**11**
Semi-Coastal Zone	Qalqilya Deir Al-Ghsoun	Izbet Salman	Nour Shams	**4**
Central Highlands	Nablus Hebron	Qabatya Beit Sira Al-Zawyeh Nahalin	Askar Al-Arroub	**10**

AE Zone	Urban Areas	Rural Areas	Refugee Camps	Total
		A'Ramadin Za'tara		
Eastern Slopes		Wadi Al-Far'a	Al-Far'a Camp	**2**
Jordan Valley		Dyuk & Nuwimeh		**1**
Total Localities	**7**	**13**	**7**	**28**

- Focus Group Discussions Meetings Based on the findings of the literature review and the semi-structured interviews, seven focus group discussion meetings were conducted with the following groups to validate and discuss the findings of the literature review and the semi-structured interviews: cash-crop and farmers for local consumption, registered refugees in refugee camps; and PA employees.

C. Assessment Limitations

The assessment was largely based on key informant interviews and direct field observations. To verify and triangulate qualitative data gathered through interviews, the assessment team ascertained anecdotal evidence through conducting several informant interviews with the same type of informants in each locality visited, as well as with stakeholders that can validate data/informants' answers. For example, when interviewed households reported increasing their credit purchases of food, the assessment team inquired about the retailer with whom the households deal and conducted a follow-up interview with the retailer to verify the household answers. This proved to be helpful in validating findings and anecdotal evidence in most cases, but in others conflicting answers were provided. In the case of the latter, the assessment team used its judgment and own interpretation, on the basis of the overall assessment findings, in presenting the findings.

The households responses to certain questions that could not be verified with informants other than the household itself were sometimes too vague despite several attempts by the assessment team to get answers to these questions in several ways. Obtaining answers to questions on household income, food stock levels and consumption patterns was particularly difficult in several cases. Moreover, given the prolonged economic crisis, it was very difficult for many of the interviewed informants to delineate the changes that took place in their livelihoods or provide exact dates for certain events that took place in the past six to eight months and may have affected them. For example, fishermen could not specifically explain how the volume of their fishing catch changed in the past six months. Similarly, households could not identify the changes in certain consumer behaviors during the same period. Furthermore, could not recall conclusively how their stock levels of food changed in recent months.   This is why this report often presents livelihood changes in their recent historical context as opposed to providing specific examples of the changes that took place in the last six to eight months.

D. Report Structure

The report is divided into three main sections. Following this introduction, Section II presents changes in the food security situation in the West Bank and Gaza Strip. It provides an analytical description of these changes in terms of access to, and availability and utilization of food. Factors affecting food security are also identified within this section. Section III culminates the report with a description of the coping strategies used by Palestinian household to mitigate their difficult living conditions. To provide the voice of the individuals and organizations interviewed during the assessment field work, the report presents quotes from interviewed individuals in several sections.

III. FOOD AVAILABILITY, ACCESS AND UTILIZATION: WHAT CHANGED?

A. Food Availability

A.1. Market Availability

The capacity to produce food in the West Bank and Gaza Strip (WBGS) is largely constrained by limited access to land and water; high cost of water and poor quality of water sources; limited access to fertilizers and other inputs; and, increased cost of fertilizers and other inputs, most of which are imported through Israel. In general, the WBGS is almost entirely dependent on imports of staple food items, such as cereals and pulses. Significant domestic food production is limited to a few commodities with a high nutritional value (mainly olive oil, poultry products, milk/dairy, tubers, and vegetables). In the Comprehensive Food Security and Vulnerability Analysis (CFSVA) 2007, WFO and FAO reported that 96 percent of the consumed wheat and 98 percent of the consumed legumes in the Palestinian territories in the agricultural year 2004/2005 were imported, while local red and broilers meat production covered only 18 percent of the local consumption.

Palestinian traders' access foreign markets through Israeli ports of entry and exit. However, the Palestinian access to these ports is continuously hampered by Israeli restrictions and security measures. Traders of agricultural produce are particularly affected in this regard as they are subject to unequal application of the 1994 Paris Protocol on the one hand, and unpredictable internal closures that often cause their produce to perish on route while waiting to be processed at Israeli checkpoints and commercial crossings. Moreover, agricultural and food market fragmentation in the WBGS, which has been well documented in several studies and reports, cause a situation in which even the food that is produced or imported is not evenly distributed.

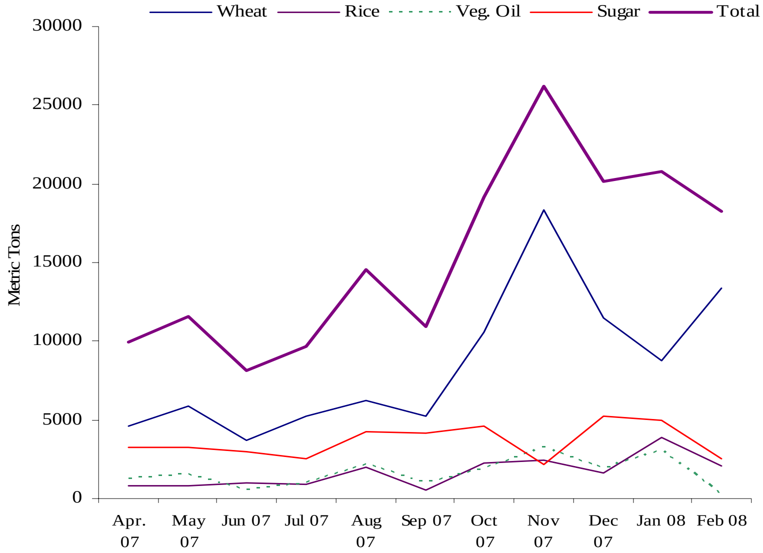
Despite this, market visits conducted by the assessment team confirmed that, on the balance, food is generally available in the WBGS market, with certain non-staple foods being unavailable in the Gaza Strip due to the restrictions on imports and the closure of the three commercial crossings imposed by the GoI in the aftermath of the June 2007 events. Field interviews with retailers and wholesalers in Gaza suggest that both basic and non-basic food items are generally more available in the Gaza market nowadays than four months ago due to more systematic entry of basic foods through Kerem Shalom, and due to fact that most wholesalers and retailers were able to restock their shelves when the borders with Egypt were forcibly opened for a period of ten days in late January 2008.[7]

What is noteworthy, however, is the reduced, and sometimes very limited, stock of several food items at both the retail and wholesale levels in the WBGS. In the West Bank, retailers and wholesalers reported that their below average stock levels of various items is mostly due to decreasing purchasing power among consumers, and –in part- due to their financial inability to maintain the usual stock levels as result of the rapid price increase of several goods in which they trade. In the Gaza Strip, retailers and wholesalers interviewed attributed their reduced stocks mainly to the restrictions on imports. When asked whether they had run out of stock of any food items since June 2007, all retailers and wholesalers interviewed in Gaza pointed that they had indeed ran out of flour, rice, sugar, dairy products, powder milk, and vegetable oil at least in three occasions since June 2007.

[7] It was observed during the field interviews and market visits that Egyptian made products are widely available in the Gaza market. Interviewed retailers and wholesalers reported that most of these products get smuggled from Egypt through underground tunnels in Rafah area. It is rumored that some 300 such tunnels have been dug in recent months by various groups and individuals, with the knowledge of Hamas officials who are regulating the entry of goods through these tunnels by enforcing taxation and customs. This may explain why acute food shortages have not materialized in the Gaza Strip, and why market prices for most commodities did not significantly increase beyond their October 2007 levels as one would expect.

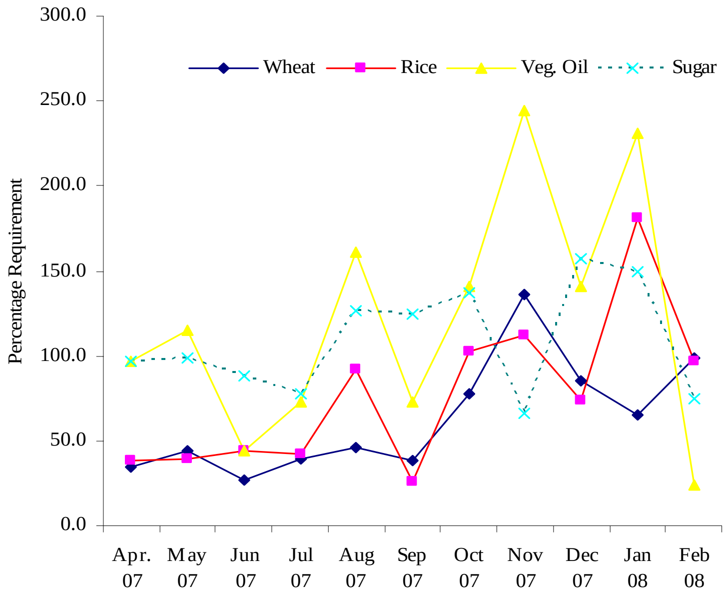
Generally, baby food, olive oil, nuts, chocolate, spices, juices and carbonated drinks continue to be in short supply in the Gaza market, continuing a trend that began to emerge in late July 2007. According to Gaza wholesalers, the opening of the borders with Egypt was not sufficiently long enough to allow traders to replenish their stocks with enough quantities of all the missing food and non-food items in Gaza.

Figure 1: Quantities of food imported in the Gaza Strip for commercial and humanitarian needs between April 2007 – February 2008



Source: OCHA, Humanitarian Monitor. Consolidated from several reports.

Figure 2: Percentage of monthly food requirements in the Gaza Strip for commercial and humanitarian needs met by imports



Source: OCHA, Humanitarian Monitor. Consolidated from several reports. Calculations made by Al-Sahel.

When asked to compare their current stock levels of the different items they sell to that prior to the resumption of payment of PA employee salaries, all retailers and wholesalers confirmed that their stock levels have indeed increased, albeit not reaching their usual levels. The increase in stocks was facilitated, according to them, by more frequent and increased levels of credit repayment by employees. The increase in debt repayment, however, was not accompanied by increased sales.

"My sales nowadays are 50 percent of what they were when the PA was not paying its salaries… Employees are paying their debts on time these days, but they are also buying less of almost everything. We are all in the same boat trying to deal with the mad price increases."

Quite the contrary, all retailers and wholesalers interviewed in the West Bank and Gaza confirmed that their monthly sales have dropped between 20-50 percent in recent months and that their regular customers are buying less of almost everything. They attribute this to loss of consumers purchasing power as a result of the rapid increase in food prices in recent months on the one hand, and high accumulated debt obligations by employees on the other hand. The following table provides a summary of usual versus current stock of a selection of basic food and non-food items at the two retail and wholesale outlets interviewed within the framework of this assessment.

Table 2: Sample of current vs. usual wholesale and retail stock levels of select commodities and basic food items

	Retailer 1-WB		Retailer 2-GS		Wholesaler 1-WB		Wholesaler 2-GS	
Item	Current Stock	Usual Stock	Current Stock	Usual Stock	Current Stock	Usual Stock	Current Stock	Usual Stock
Flour	1 MT	2-3 MT	50 Kg. (sold by kg.)	1 MT	7 MT	10-15 MT	None	None
Rice	1 MT	2-3 MT	½ MT	2 MT	10 MT	20 MT	10 MT	10 MT
Sugar	3 MT	3 MT	1 month worth	3 months worth	20 MT	20 MT	10 MT	20 MT
Canned Foods	100 boxes	150-200 Boxes	1 month worth in limited varieties	3 months worth in wide varieties	400 Boxes	400-600 Boxes	20 Boxes	100 Boxes
Baby Milk	80 packages of different varieties	80-120 Packages of different varieties	None	1 week worth	1,000 packages of different varieties	1,000 packages of different varieties	None	3 months worth
Diapers	60 of different brands	80-150 of different brands	3 months worth	3 moths worth	None	None	1 month worth	1 month worth
Baby Foods	10 Boxes (24 packages each)	40 Boxes (24 packages each)	None	2 months worth	None	None	None	2-3 months worth

Item	Retailer 1-WB		Retailer 2-GS		Wholesaler 1-WB		Wholesaler 2-GS	
	Current Stock	Usual Stock	Current Stock	Usual Stock	Current Stock	Usual Stock	Current Stock	Usual Stock
Cleaning and personal care products	At Stock	At Stock	2 weeks worth (three brands)	2-3 months worth in several varieties and brands	At Stock	At Stock	2 weeks worth	3 months worth

Wholesalers interviewed revealed that they have reduced their credit sales to retailers to mitigate their own risk on the one hand and to ensure that their reduced stock levels reach the largest number of retailers. This was confirmed by several retailers who also mentioned that they hardly receive the entire order they place with wholesalers.

Anecdotal evidence suggests that smaller retailers with limited financial capabilities have reduced their carrying capacity of flour and other large-ticket items in recent months. Market visits confirmed that the stock of frozen and refrigerated foods at the retail level in both the West Bank and Gaza Strip is also very low, and sometimes non-extant.[8] Several retailers indicated a shift in their procurement practices towards lower price and quality commodities (that have lower profit margins), which are commensurate with their customers' preferences. The shift to lower price items was a noticeably common practice among Gaza Strip retailers and refugee camp retailers in particular, who also reported reducing their work hours in the past four months (especially in the Gaza Strip).

To mitigate the effect of reduced income and liquidity shortages due to high credit sales, many retailers have either put a ceiling of NIS 500-800/month for credit sales to their customers, or stopped credit sales altogether. Several retailers also reported extending credit only to employed customers, or customers whose family members are known to have a regular job as a guarantee for payment. At the same time, however, some retailers –particularly in refugee camps in the West Bank- have begun lending money to some of their customers who are known to be in need of cash for education, health and other purposes.[9]

A.2. Availability of Food at the Household Level

> *"Extending credit to the unemployed indefinitely is like a death sentence to a business. People think that we are heartless because we stopped selling on credit, but in fact we are doing them and ourselves a favor because they do not have to live with the guilt of non-payment… No one has ever died or will die of hunger in this country."*

Interviews with households in the WBGS have shown that the level of availability of food at the household level is continuously decreasing, owing to reduced incomes, loss of purchasing power and increased food commodity prices. The majority of households interviewed reported having reduced stocks of food compared to six months ago, despite increasing the percentage of their income spent on food and substituting high-quality food with lower-quality, cheaper foods. For example, and as we shall examine later, almost all households interviewed reported consuming less fresh meat,

[8] The reduced stock levels were clearly noticeable in the shops of small and medium retailers. Reduced stock levels in the large supermarkets and shops of wholesalers were less visible (particularly in urban areas of the West Bank).

[9] This was observed twice during an interview with a retailer in Al-Arroub Refugee Camp. In the first occasion a university student stopped in to borrow NIS 14 for transportation to and from his university in Hebron. The second customer came in to borrow NIS 60 to pay for transportation to visit her daughter who has given birth in one of Hebron's hospitals on the morning of the interview.

vegetables, and fruits in the past six months than ever before, and considered many of these foods (especially fresh red meat and fish) a "luxury" that they can no longer afford.

"We have not had any stock of food for years now. The only stock we had in the last year was a few kilograms of flour, milk, white beans, sugar and rice, which we received from the [UNRWA] emergency [program]… I have been used to this, and I buy what I can on a daily basis."

Households with no regular source of income were found to have even less stocks of food. When asked to indicate the quantities of basic food items[10] they have in stock, the majority of these households indicated having very limited stocks, highlighting that the food stocks they have are largely limited to what they receive from emergency and social welfare programs of UNRWA, WFP, MoSA and other local and international humanitarian and charitable organizations. Many households visited did not have any stock of food left other than a few kilograms of lentils, rice, sugar and tea, which cannot last the household for more than a day or two. Frozen meats, dried vegetables/foods, milk and dairy products were reported to be in stock in very limited quantities by less than one tenth of the households visited. Moreover, many of the households that used to store the traditional goat cheese, olives and olive oil reported lack of ability to buy them, let alone store them.

The overwhelming majority of the households interviewed in the WBGS reported that they buy food in very small quantities twice or three times a week, enough for one to two days. This was confirmed by retailers who also reported noticing that consumers are buying in less quantities, which has forced many of them to start selling bulk packages by the kilogram.[11]

A quick comparison between the reported food stocks of various households visited suggests that the households of the chronically unemployed who do not receive any form of regular cash or food assistance is much lower than any other type of household visited during the assessment. Of these, refugee households in the West Bank seemed to be the worst off as most of them reported not having any food stocks, highlighting that they depend on the good will of their neighbors and neighborhood merchants to secure subsistence food for their household on a daily basis. The following table shows the stock levels of four households visited in the course of the assessment as an illustration of the limited food stocks at the household level in the WBGS.

Table 3: Household food stock levels

Item	HH #1	HH #2	HH #3	HH #4	HH #5[12]
Flour (Kg.)	25	25	25	10	60
Rice (Kg.)	4	1	2	0	15
Olive Oil (Kg.)	0	1.5-2	0	0	0
Corn Oil (Ltr.)	5	2	3	0	5
Sugar (Kg.)	10	5	5	0	8
Chickpeas (Kg.)	1	0	0	0	2-3
Lentils (Kg.)	2	0.5	0	0	2
Milk (Ltr.)	0	0	0	0	0

[10] In interviews, households were asked to indicate the quantities they have in stock of the following basic food items: flour, rice, vegetable/corn oil, sugar, legumes (chickpeas and lentils), olive oil, and milk.
[11] It was observed during the assessment that retailers have open bags of flour, rice, and sugar which they sell by kilogram or fractions thereof. The same was observed with eggs where some customers came in during one of the interviews with a retailer asking for four eggs (sold for 2 NIS).
[12] This household had received a food parcel from UNRWA two months ago. It also received some assistance from MoSA.

A.3. Availability of Food Assistance through International and Local Organizations

WFP and UNRWA are the main providers of regular and emergency food assistance for Palestinian households, where the former targets non-refugee households and the latter targets refugee households, which make up 40 percent of the Palestinian population. In addition to providing food assistance, UNRWA is responsible for providing the overwhelming majority of the services offered to the refugee population in the WBGS, including health and primary education.

Between 2004-2006, UNRWA and WFP provided food assistance to more than 1.8 million Palestinians through regular and emergency food assistance programs. In 2005, the two organizations distributed a total amount of 126,066 Metric Tons of food aid.[13] In 2006 the organizations' food aid caseloads increased from 1.55 million to 1.83 million Palestinians, with a US$ 96.5 million[14] budget in the June Revised CAP 2006. In 2007, the caseload of both organizations increased. WFP provided food to 634,613 non-refugee Palestinians through its Assistance to the Destitute (ATD) scheme and Food-for-Work and Food for Training (FFW/FFT) schemes. UNRWA provided approximately 123,000 persons (30,000 households) with regular food assistance through its Special Hardship Cases (SHC) program. It also provided emergency food assistance to some 257,000 households in the WBGS; i.e. a caseload of 1.3 million persons.[15]

The ability of both organizations to maintain their caseloads and levels of assistance began eroding in late 2007 as a result of reduced donor funding (particularly WFP), and increased commodity prices (especially wheat four) and transportation cost. For example, the cost of WFP's two-year Protracted Relief and Recovery Operation (PRRO) has risen to $162.4 million (an increase of $55 million in just six month, roughly +50% of its initial cost) as a result of the price and transportation cost increases, which made it impossible for WFP to target the same number of beneficiaries as it had originally planned. To top it up, until April 2008, WFP received only 30 percent of the funds it needs to implement the full scale of the PRRO, which has forced it to begin reconsidering its scale of coverage.

Moreover, due to much of the same reasons and despite having higher than usual funding for its core operations in 2007 and 2008, UNRWA has been unable to maintain its emergency food assistance program in the West Bank since late 2007. The agency has recently begun discussing with the Camp Popular Committees (CPC), bodies that represent the refugee population inside the Refugee Camps, ways through which UNRWA services could be made more effective, efficient and more accessible to the refugee population outside refugee camps. Redistribution of food rations and food distribution inside camps have been two of the central themes of these discussions.[16]

"I do not know what UNRWA is intending to do exactly, but I tell you that it would be catastrophic if they stop or even further reduce their food distribution. I wait from one year to the next to get my food package [from the emergency program]. It is like the light at the end of the tunnel… I would be willing to do anything for it not to stop."

While a final agreement has not yet been reached between UNRWA and the CPCs about the redistribution initiative and other issues, the rumor that UNRWA is considering reducing the level of its services, particularly food distribution inside camps, has sparked a wave of

[13] WFP and FAO, 2007 CFSVA.
[14] UNRWA's food aid budget in the revised 2006 CAP was US$47.2 million.
[15] About 60,000 of these families also received a one-off cash assistance of NIS 1,000.
[16] Reduced levels of donor funding is mostly applicable to WFP and FAO. UNRWA has received major increases in funding in 2008 compared to previous years, albeit not commensurate with the increases in need and cost. In addition, UNRWA's donors have responded with financial commitments earlier in the year than the previous year. In the West Bank, UNRWA slightly reduced its emergency food aid, but maintained the scale and scope of its Job Creation Program (JCP) to the 2007 levels.

organized protests in refugee camps that included the forced closure of UNRWA camp facilities on several occasions. While none of the refugee households interviewed could fully explain what is being proposed by UNRWA, the high level of concern they have expressed during interviews over the possibility of food and health assistance reductions is clearly indicative of the significance of this type of assistance to the livelihoods of the refugee population.

The budgetary constraints faced by the UN organizations operating in the WBGS as result of the increase cost of operations due to rapidly increasing commodity prices and transport costs, as well as below average funding for emergency and relief programs are quite alarming given the socio-economic hardships being faced by the Palestinian population on the one hand, and the proportion of the population that depends either entirely or partially on the humanitarian assistances and social services provided by these organizations. The low financial commitment by donors for the UN CAP 2008 is being felt by the beneficiaries it intends to target, as interviews have shown that a significant proportion of those in dire need of assistance have not received any assistance in several months and are scraping for subsistence, often resorting to morally and socially unacceptable coping strategies that will have irreversible outcomes on the long-term.

Table 4: CAP 2007 and 2008 compared

	CAP 2007 – Revised May 2007		**CAP 2008**			
Sector	**Requirements in US$ million**	**Funding in USD million**	**Requirements in US$ million**	**Funding in USD million**	**CAP 08 % Funded (as of 18 April 08)**	**CAP 07 % Funded (as of 18 April 07)**
Agriculture	11.3	6.7	22.2	0.2	9%	47%
Coordination & Support Services	14.2	12.8	18.3	0	22	100+%
Economic Recovery & Infrastructure	198.1	60.9	158.0	2.8	11%	35%
Education	9.1	7.3	7.9		0%	84%
Food	149.7	136.9	156.1	0.2	21%	100+%
Health & Psychology	35.7	26.4	40.1	0.3	20%	70%
Protection	1.7	0.5	8.7	1.1	29%	66%
Water and Sanitation	35.0	4.3	42.9	0.3	1%	15%
Shelter & Non-Food	0.0	0.3	-	-	-	18%
Multi-Sectoral	0.0	0.1	5.5	0	0%	100%
Mine Action	-	-	0.2	0	0%	-
Other	-	-	2.0	0	100+%	-
TOTAL	**454.7**	**263.4**	**461.9**	**5.9**	**28%**	**61%**

Source: OCHA, The Humanitarian Monitor, March 2008.

UN agencies are not the only organizations suffering from reduced funding and operational difficulties in providing food to their beneficiaries. Local charitable organizations and non-governmental organizations that implement food and cash distribution and employment generation programs in the WBGS reported decreased funding for their programs during last year, as well as reduced caseload. Organizations in the Gaza Strip seemed to be more hard hit by the limited funding as they also have to deal with the added restrictions of imports and bank restrictions on cash transfers to Gaza (and particularly to Islamic charities). Anecdotal evidence supporting these conclusions include the following:

- The services of the MoSA in Gaza have been forcefully minimized by Hamas immediately following the June 2007 events. Thus, the ability of the Ministry officials to administer food distribution programs on behalf of WFP has been greatly compromised. According to

Ministry officials, MoSA has stopped distributing food rations to social hardship cases in the WBGS in late March 2008, and it is not clear that distribution will be resumed any time soon.

- Due to lack of funding, MoSA was not able to provide cash assistance to the Social Hardship Cases in the WBGS for six months between July 2007 and February 2008.

- The Zakat Committees have not been able to maintain their usual level of services in the past two years due to several reasons, including: *i)* reduced local contributions to the Zakat Fund (used, in part to finance, the Orphans Sponsorship Program); *ii)* restrictions on bank transfers to the Zakat Committees; *iii)* increased prices of food commodities, which has forced several committees to reduce the value/weight of the rations provided to beneficiaries; and, *iv)* inability to secure the needed food items for the in-kind assistance program beneficiaries in the Gaza Strip to the limited availability of some items in the local market as well as the noticeable increase in food prices. Combined, the Hebron and Gaza City Zakat Committees have accepted to enroll more than 600 households in their cash and food assistance programs between June 2007 and January 2008, but have not been able to provide any service to these families due to the lack of resources. Given these difficulties, and in an attempt to maintain its cash assistance service to the 1,854 households, the Gaza City Zakat Committee reduced in August 2007 the amount of cash assistance provided to its beneficiaries from NIS 100/month/household to NIS 70/month/household (a 30 percent reduction). It also reduced the number of items included in the food package distributed to the 500 households Benefiting from its in-kind assistance program. The Hebron Zakat Committee, however, did not take such measures and maintained the level of assistance it has traditionally provided.

- Al-Salah Islamic Association, the largest Islamic charity in Gaza, reported a significant reduction in the number of people served with food and cash assistance. Giving Deir Al-Balah branch as an example, the association indicated that the number of beneficiary households has dropped from 901 to slightly under 800 in between January 2007 and March 2008, highlighting also that the value of cash assistance it provides to households has also decreased from NIS 348,800 to NIS 258,000.

- Youth-Without-Borders, a small charity that operates in southern Gaza, also reported inability to maintain its food distribution program to poor households. According to the association, the number of families it serves has dropped from 200 households to 70 households since the June 2007 events.

Notwithstanding the above, food and other humanitarian aid is significantly contributing to food security in WBGS. However, different agencies identify their beneficiaries on the basis of their own specific eligibility criteria, use different scales and provide diverse aid packages, including food. Thus, the specific role and impact of aid on the livelihood of the recipient households is difficult to measure. Having said this, however, it should be noted that interviews with households strongly suggest that aid coordination and targeting remain problematic, with many households (particularly in the Gaza Strip) receiving food assistance in rather large quantities from several organizations while others are hardly reached. The assessment found that several interviewed households receive food assistance from UNRWA, MoSA and other charities on a regular basis, while others -who seem to be eligible for receiving assistance according to established targeting criteria- do not get any assistance.

The lifting of the international embargo on the PA following the June 2007 events, the PA's publication of the PRDP which received wide support from donors, and the recent surge in the number of actors and projects addressing food insecurity through creation of household physical assets (eg. home gardens and animal rearing projects), have generally decreased donors interest in maintaining support to emergency food distribution and relief programs of various organizations.[17] While this is considered a positive transformation (from relief and emergency to development assistance and budgetary support), the developments in the recent months have been neither sufficient to induce the kind of structural macro-economic adjustment needed to improve the general economic conditions and realities in the WBGS, nor able to offset the growing need by significant proportion of the population whose conditions are best suited for cash and food assistance. This has been clearly evident in interviews with several refugee and non-refugee households, who reported that their ability to bridge their consumption gap by the tapping the conventional food assistance programs has been noticeably decreasing in recent months.

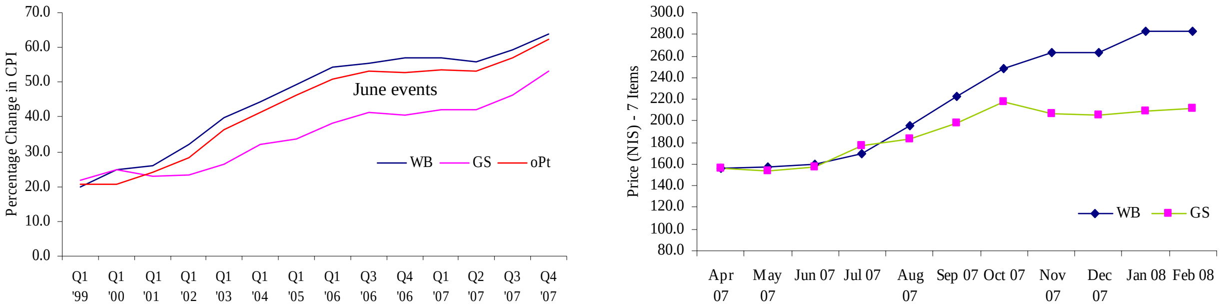
B. Access to Food

Qualitative data gathered through this assessment confirm that economic access to food continues to be the most significant food security concern in WBGS. While strong social ties and traditional social safety nets have precluded the possibility of an acute food crisis, anecdotal evidence gathered through field interviews and official statistics on the socio-economic conditions in the WBGS clearly suggest that food security has been declining in recent months. As we shall examine below, the recent resumption of payment of PA employees salaries could not offset the effects the food price increases, the continued closure of Gaza, the internal closure of the West Bank and the natural calamities, which have created a kind of "market-induced shock" to vulnerable households.

B.1. Price Increases

Continuing a noticeable trend that began to emerge in 2007, the Palestinian Consumer Price Index (CPI) soared to a record 168.16 in February 2008. For the tenth month in a row, the increase in the CPI was largely driven by significant increases (2.43 percent) in food prices in both the West Bank (4.74 percent) and Gaza Strip (2.21 percent). The figure below depicts the evolution of the CPI between Q1-1999 and Q4-2007, and the evolution of the price of the seven-items basket of basic foods (flour, olive oil, rice, vegetable oil, chickpeas, sugar and milk powder) between April 2007 and February 2008.

Figure 3: Evolution of the CPI ('99-'07) and prices of the 7-items food basket (Apr 07 – Feb 08), by region



Source: PCBS, CPI for various quarters.

Source: WFP, Market Monitoring Reports.

According to field interviews with households and retailers in the WBGS, there are increasing numbers of Palestinians who are scrambling to put enough food on their tables as a direct result of food price increases. Retailers noted that the prices of basic commodities and food items are prohibiting their purchase by most Palestinian households. Particularly affected by the price increases, according to these retailers, are the households of the chronically unemployed who have no

[17] The exception could very well be UNRWA, which received increased support to its 2008 Emergency Appeal.

regular source of income and/or assistance.[18] Increasingly more households are buying cheaper foods and reducing the quantities of foods they purchase.

All of the households visited revealed that their consumption levels of many food items has been significantly reduced as a result of the loss of purchasing power and increasing prices. The most frequently mentioned food items which have been cut by the households visited are: canned foods, fruits, sweets, dairy products, meat products (especially fresh red meat and fish) and soft drinks. Households' consumption of potatoes, eggplants, eggs, legumes (especially lentils, fava beans and chickpeas), bread, and sugar –considered staple food items by Palestinian households- remains relatively unchanged. What is noteworthy, however, is the number of households in both Gaza and the West Bank that reported reducing their consumption of fresh vegetables (especially tomatoes) as a result of the exponential increase in vegetables prices in the aftermath of the frost that hit the WBGS in early January 2008 (see section B.3. below).

The diverging food price levels between the West Bank and Gaza Strip did not seem to translate to noticeably different food consumption patterns among the interviewed households in both regions. The possibility of buying food on sale from neighborhood retail outlets, and the fact that several households have reportedly reduced consumption to a minimum could possibly explain why different consumption patterns have not emerged between the two regions. However, as noted earlier, some retailers have put a ceiling on the credit sales they extend to customers, stopped extending credit to customers who do not pay large proportions of their debt at the end of each month, and/or reduced the number of items that could be purchased on credit to what they consider to be essential.

"We have reduced our food consumption to a bare minimum. I honestly do not know what else we could do to cut our expenditures on food."

"We eat lentils almost twice every day... I have not bought tomatoes in more than 21 days. How can I? A kilo costs NIS7, and to make a salad for the family I need at least two kilos!"

"Customers who used to buy three kinds of food for their family's breakfast are now buying one kind, and in less quantity than before. They often select the cheapest food and the one that can offer the largest spread."

In interviews, PA employees claimed their purchasing power has not improved significantly with the resumption of salary payments due to the high levels of debt they have accumulated during the transitory period in which their salaries were suspended. In fact, if we factor in the general increase in prices, we can conclude that the PA employees' salaries have necessarily decreased in real terms, thus eroding their purchasing power relatively dramatically. PA in employees in Gaza were even less positively affected by the resumption of salary payments than their West Bank peers as the increasing unemployment resulting from the closure imposed on Gaza has put increasing financial burdens on them to support more dependents. This may explain why the assessment team did not find that PA employees' households –particularly those at the low end of the pay scale- are significantly better off than other households visited in terms of their food consumption.

SPOTLIGHT: Al-Jibrini Dairy Production Company

With 38 brands of milk, dairy and other processed food products and 250 full-time employees, Al-Jibrini Dairy Production Company is one of the leading producers of dairy products in the Palestinian territories. According to Zeyad Al-Jibrini, the company's Sales Manager, the increase in fresh milk

[18] On the basis of the poor living conditions observed during interviews with these households as well as there well below average stocks of food and self-reported purchasing behaviors, the assessment team concurs with the conclusion made by retailers.

prices, devaluation of the US dollar, and increase in fuel prices, as well as declining sales volume have set the company's financial performance on steady decline since the first quarter of 2007.

"The declining sales along with the 40 percent increase in milk prices in the last six months have forced us to reduce the quantities of milk we buy from farmers by about 30 percent four months ago," Mr. Al-Jibrini says.

The average sales of the company have decreased by an estimated 20 percent since November 2007, with sales in Ramadan –in which sales usually increase by 30 percent- witnessing a 50 percent decrease from the previous year. In an attempt to reduce its operational costs, the company reduced its daily production capacity in September 2007 from 40,000 tonnes to 25,000 tonnes. "Our profits are being squeezed, and it seems that we cannot do much about it," Al-Jibrini says. "We have benchmarked our sales to those of others like Al-Juneidi, and we found that all producers are facing the same problem," he adds.

In addition to reduced sales, the company which sells its products on consignment, reports increased proportion of returns in the last six months. According to Mr. Al-Jibrini, the percentage of returns increased from an average of 2-3 percent in September 2007 to an unprecedented 8 percent on March 2008, affecting all product categories. The highest percentage of returns has been recorded in the large package, more expensive products (3-4 liters), which has lead the company to reduce the quantities produced of these products by 15 percent.

"We have maintained our quality standards and even increased our marketing activities. The only thing that can explain what is happening to us and others is that the average Palestinian family is facing very difficult financial conditions that is making it more difficult for it to maintain its standard of living," Al-Jibrini concludes.

B.2. Closure of the Gaza Strip

"The number of truckloads allowed to enter Gaza in March [2008] was significantly higher than the previous three months. Despite this, what entered is less than 30 percent of the usual inflow [prior to June 2007]…. Most of what enters Gaza are foodstuffs, and these are insufficient in terms of quantity and nature to have a noticeable impact on the humanitarian situation here."

The closure imposed on the Gaza Strip since June 2007 has been having severe humanitarian consequences on the 1.5 million people who live in Gaza, and has caused what could be irreversible damage to Gaza's fragile, import and export de economy. The slight improvements in unemployment rates reported in the PCBS Labor Force Survey results for the fourth quarter of 2007 have not been sufficient to address the prolonged economic crisis in Gaza or reverse the impact of the closure in way that could be felt by the average Gazan household. Anecdotal evidence clearly suggests that a significant proportion of the Gazan population remains more reliant on aid than ever before. According to OCHA, 80 percent of the Gazan households currently receive humanitarian aid, a 27 percent increase from 2006.

The continued restrictions on imports and the freeze on exports into and from the Gaza Strip remain the main reasons for reduced livelihoods and high unemployment rates in the Gaza Strip. The lack of raw materials and trade opportunities have forced the overwhelming majority of private sector establishments that provide jobs to over 50 percent of the population in the Gaza strip to either completely shut down or significantly reduce their operating capacity. It has been estimated that more than 75,000 workers out of the total 110,000 workers employed by the Gazan private sector have been laid off.[19] Anecdotal evidence gathered in the course of this assessment suggests that an additional 10,000-15,000 workers in the services sector might be subject to lay-offs within a few months as a result of decreased economic activity.[20]

Agriculture, which has been a sector of employment of last resort to many unemployed Gazans, has also been severely hit by the loss of export opportunities, lack of and increased prices of agricultural inputs, and increased restrictions on fishing.

B.2.1. Closure Effect on Fishery Sector

According to the Fishermen Union in Gaza, there some 5,000 people who derive their livelihood from work in the fishing sector. Sixty percent of these are fishermen (waged workers) and boat owners, and the remaining 40 percent are individuals whose livelihoods are dependent indirectly upon the fishing industry through the servicing and maintenance of the fleet of vessels.[21]

An assessment conducted by WFP in October 2007 noted that the closure that ensued the June events has had a detrimental effect on the fishing sector in Gaza, as it was combined with an imposition of a reduction in the permissible fishing distance (from 6 nautical miles to 4 nautical miles) which led to lower quality and quantities of fishing catch. The assessment also highlighted the following:

With their reduced sales, low profits due to low local demand, inability to export any of their "high quality" catch, and high cost of fishing, many fishermen have been opting to remain on shore. Reportedly many others have been forced to keep their boats in their landings due to the lack of the needed spare parts and maintenance materials.

Anecdotal evidence gathered through interviews with fishermen during this assessment confirms all the conclusions of the WFP assessment, and, in fact, suggests that the fishing sector conditions have deteriorated further. The following table juxtaposes the findings of the WFP assessment with the findings of this assessment to highlight the developments that have happened since October 2007.

Table 5: Developments in fishing sector between October 2007 and April 2008

October 2007	April 2008
Reduction in the number of operating fishing boats: Reportedly, some 30 percent of the fishing boats are not being used due to the lack of feasibility of fishing, the reduction in the permitted fishing distances, and/or the lack of spare parts and maintenance equipment. Of the 18 trawlers owned by Gaza fishermen, only 2-3 operate daily; while most of the purse seiner boats (used mostly to catch "high quality" fish at long distances off shore) have not operated for the past four months.	Anecdotal evidence suggests that the number of fishing boats that continue to operate has declined from 70 to 20 percent, with purse seiner boats continuing to be grounded as they cannot reach the fishing areas suitable for them. Trawler and launches comprise the majority of the boats still in operation. Some Felukas and Hasakas still operate, but on a very limited scale, most often with no engine. The explanation provided by interviewed fishermen for the reduction in the number of operating boats is twofold. Firstly, increased restrictions by the Israeli Navy boats on the permissible off-shore fishing distance, where it was reported by several fishermen that they often get fired at once they reach 2 nautical

[19] OCHA, Humanitarian Monitor, September 2007.
[20] Al-Sahel interview with Gaza Insurance Company, PalTrade, and Association of Banks in Palestine.
[21] Assuming that the average household size in Gaza is 7.5 persons, it can be said that some 35,000 people depend upon the industry for their livelihood.

	miles. Second, the shortage in fuel supplies, where the price of one liter of gasoline has increased threefold in April 2008 due to fuel supply shortages as a result of the closure of Nahal Oz crossing. The continued shortage in fuel supply poses a serious threat to the fishermen nowadays in particular as a little over a month remains before the high season for Sardine fishing ends.
Reduction in fishing income: The sharp decrease in domestic demand for fish (as result of the loss of purchasing power among consumers and the freeze on exports) combined with less quantities of catch has considerably reduced fishing income, which is also being squeezed by increasing fuel prices. Anecdotal evidence suggests that fishermen's income has decreased by half since June 2007, where owners of fishing boats who were used to making anywhere between NIS 1,500-2,500/month are now making no more than NIS 1,000/month; whereas workers who used to make anywhere between NIS 900-1,200/month are now making NIS 500/month at best. Market visits revealed that "high quality" fish prices have dropped by more than 50 percent, while "low quality" fish (such as sardines) has somewhat maintained its pre-June price. For example, Luxus, which usually sells for NIS 100-120/kg, is now being sold for NIS 50/kg; and a kilogram of shrimps now costs NIS 40-50 compared to NIS 90-110 before June 2007.	All interviewed fishermen and fishermen organizations confirmed that fishing income has dissipated in recent months due to increasing fishing cost and limited quantities of catch. Most fishermen interviewed reported having no catch at all, or as little as half a box of fish during March 2008 (slightly more the month before). Limited fish supply in Gaza's Fish Market was observed during several field visits conducted between April 3 and April 19, 2008. Sardines accounted for more than 90 percent of what was being displayed for sale. Despite the low availability of fish in the local market, the price of fish on the offer is surprisingly low. Sardine sells for NIS 20-25/kg, whereas Luxus sells at 60NIS/kg. As a direct result of the export freeze, the fishing sector has been losing an estimated US$ 32,000 per day in export sales.
Increase in the price of fishing inputs: Due to the restrictions on imports, the prices of fishing inputs have sky rocketed, prohibiting a significant proportion of fishermen from carrying out the needed maintenance to their boats. Examples of price increases obtained through the field interviews include the following: Input — Pervious price — Current Price Rope — NIS 35 — NIS 50 Engine pistons — NIS 500 — NIS 1500 Engine — NIS 20,000 — NIS 30,000 Lead for fishing nets — NIS 8/kg — NIS 15/kg	With the exception of increased fuel prices, fishing inputs prices do not seem to have increased much since October. In part, this may be attributed to the fact that some fishermen were able to obtain a large number of the inputs that were in short supply from Egypt in January 2008.
Increased indebtedness among fishermen: Analysis of the credit reports of Al-Tawfiq Cooperative Society of Fishermen, a cooperative that has a membership of 185 fishermen, reveals	While Al-Tawfiq Cooperative Society of Fishermen was not visited during this assessment, anecdotal evidence on reduced incomes suggests quite strongly that most

that slightly more than 94 percent of the fishermen have a total debt of NIS 729,402 to the cooperative for boat fuel they bought on credit. The overwhelming majority of this debts has been accumulated during the past four months.	fishermen have not been able to pay the debts they owe.
Proliferation of unsustainable and internationally-prohibited fishing practices: The additional restrictions imposed on fishing rights of Gaza fishermen have been increasing the intensity of closeshore fishing -which began emerging in 2006- and leading to the emergence of both unsustainable, environmentally unfriendly and unhealthy fishing practices. Reportedly, more and more fishermen are sinking their nets in waters that contain young fish and spawning species, as well as using small-gauge fishing nets that are known to be locally and internationally prohibited. According to MoA officials, these practices are illegal as they pose a serious threat to marine habitats. Due to the political polarization between the West Bank and Gaza and the suspension of the work of the MoA's work in Gaza following the June events, however, nothing is being done to stop these practices. Moreover, some fishermen, awash with despair, have started fishing for bass in the harbor area which is known to have a high level of contamination with kerosene and other fuels.	Fishermen continue to use unsustainable fishing practices. Several fishermen highlighted that the level of fish availability is continuously decreasing, which may be an indicator that these practices are already beginning to show their negative impacts on the fisheries sector.

In tandem with the October 2007 assessment, fishermen interviewed reported coping with the difficulties they face by resorting to organizations that provide humanitarian assistance, reducing their household expenditures, and seeking other jobs after they return from their fishing ventures. Very few fishermen reported laying off their workers, explaining that they have not done so because workers are compensated in proportion to the value of catch and laying them off would only mean less catch but not necessarily less cost.

B.2.2. Plant Production Sector

The restrictions on imports and freeze exports have dealt a huge blow to the plant production sector (fruits, vegetables and cut flours) in Gaza, which has an annual production capacity of 300,000 tonnes of agricultural products and provides permanent and temporary jobs for more than 40,000 people.

The lack of agricultural inputs, loss of export opportunities and reduced consumers' purchasing power resulting from the closure regime, as well as the recent military operations in the northern and southern parts of the Gaza Strip have caused significant losses to farmers, of whom many are rendering work in agriculture unprofitable. As a direct result of the export freeze, nearly 35,000 tonnes of potatoes, strawberries, tomato and other export crops have perished or sold in the local market in Gaza at a fraction of their export prices. Also, close to 36 million carnations, cultivated by some 72 farmers, perished or were used as animal feed.[22] In the recent Israeli military operations in

[22] Al-Sahel field interviews with agricultural cooperatives in Gaza Strip.

Gaza, close to 100 dunums of agricultural lands cultivated with greenhouse vegetables were destroyed.[23]

Export income losses between June 2007 and February 2008 has been estimated to be in the realm of US$ 12 million, born mostly by strawberry, cherry tomato and cut flowers farmers. While export farmers have been directly hit by export income losses, traditional farmers who cultivate for local consumption have also felt the effects of the closure as they lost a significant proportion of their income as a result of flooding of export goods in the local market. According to these farmers,

Notwithstanding this, the effects of the closure have manifested in several problems, which have been felt by, both, export and traditional farmers. These include, inter alia, reduced agricultural productivity due to the lack of and increasing prices of essential inputs (especially fertilizers, pesticides and plastic sheeting) in the market; and, decreased profitability as a result of these problems combined.

With very little hope for obtaining new export contracts with Agrexco, the agricultural marketing company through which Gazan farmers market their products in Israel and abroad, the overwhelming majority of cash crop farmers have reportedly suspended their agricultural activities and/or moved to cultivating traditional crops to cut their losses. At the same time, several traditional farmers have reduced the area of land they cultivate, while others have shifted to planting fruit trees and vegetables that are less dependent on unavailable inputs (such as okra). Based on anecdotal evidence gathered through several interviews with agricultural cooperatives, it is estimated that the land under cultivation in the Gaza Strip has decreased by no less than 25-30 percent between June 2007 and March 2008. The following points provide a summary of the main observations

B.2.3. Animal Production Sector

The animal production sector, which is the main source of livelihood for an some 1,100 livestock and poultry farmers in the Gaza Strip according to the Charitable Association of Animal Production Farmers (CAAPF), has been steadily degenerating since the imposition of the closure in June 2007. According to CAAPF, the sector has been contracting for several years due to the lack of grazing lands and the increasing prices of feed, which have been putting pressure on the livestock owners and squeezing their income.

The recent import restrictions exacerbated the problems the sector faces. Farmers are grappling to find solutions for the problems of reduced sales and contracting income due to the general decline in consumers purchasing power; the clear shortage of the animal breeds needed for increasing livestock production (as a direct result of the import restrictions); and, increased prices of animal feed as a result of the supply shortages. All farmers interviewed in various parts of the Gaza Strip reported that they have been forced to sell a large proportion of the their animals in recent months due to their inability to secure feed for all the animals. Cattle owners resorted to underfeeding their animals, which proved to be costly as well, as these animals stooped producing milk. Those who are maintaining their animal’s diet and following up on their vaccinations, are struggling to find the types of feed they usually buy in the market, and unable to find the vaccinations for their animals when they need them. According to some farmers, Brucellosis vaccines have been unavailable since early August. While import restrictions and the have caused an increase in meat prices, farmers have not been able to benefit from this increase due to extremely low demand on fresh meat products and the suspension of cattle imports.

[23] Al-Sahel interview with the Cherry Tomato Farmers Cooperative in Khanyounis.

Poultry farmers seem to be facing the same predicament. In interviews, many of these farmers complained that their birds are dying of diseases they cannot treat due to the lack of medications, while others complained about the declining performance of their hatcheries due to the delay in the arrival and/or lack of fertilized eggs as a result of import restrictions. Most poultry farmers interviewed complained about the increasing prices of feed, underscoring that their incomes and profits are also being increasingly squeezed as a result of their inability to raise prices of both eggs and broilers given the low demand for their products in the local market.

B.3. Reduction in the Fuel Supply to Gaza Strip

The Gaza Strip is completely dependent on Israel for all its supplies of fuel (industrial gasoline, gasoline diesel, and cooking gas). Fuel enters Gaza via underground pipelines which cross the Israel-Gaza border at Nahal Oz. On 28 October, following the Israeli Cabinet decision to declare the Hamas government a "hostile entity", Israel began reducing its fuel supply to Gaza. The Israeli High Court of Justice authorized the fuel cuts in January 2008, in a decision criticized by Israeli and Palestinian human rights groups as condoning collective punishment. Since then, there has been a steady decline in the amount of fuel allowed to enter Gaza. In March 2008, only 3.8 million liters of diesel and 340,000 liters of gasoline were supplied to Gaza, representing a reduction of 57 percent and 80 percent respectively from the same month the year before.[24]

On 7 April 2008, the Palestinian Gas Station Owners Association (PGSOA) took a decision to abstain from collecting fuel from Nahal Oz in protest against the reduction in fuel supply. This decision however did not change the situation on the ground. In fact, Israel halted all fuel supplies to Gaza from 10-15 April, after two Israelis were killed by an attack of a Palestinian armed group in Nahal Oz.

At the time of conducting this assessment, fuel was a very scarce commodity in the Gaza market, and power outages were very frequent. Cooking gas was also available in very limited quantities, with the price of a bottle (20 kg) reaching NIS 200, i.e. almost four times its market price. A liter of gasoline was being sold at NIS 25-30. Diesel, the main type of fuel on which public transportation and agricultural wells operate, was being sold at NIS 10-20 per liter.

As a result of the fuel crisis, UNRWA was forced to halt its food provision activities to some 650,000 refugees in Gaza for about a week until an agreement was reached with PGSOA to resume the provision of fuel to UNRWA. WFP's food distribution to some 127,000 people were similarly halted during the same period. The ability of UNRWA, WFP and other UN agencies to maintain their operations in this situation, however, remains largely instable.

While the impact of the fuel crisis on the humanitarian situation in the Gaza Strip have been well documented and continue to be monitored by OCHA, the following key observations gathered during the field assessment are indicative of the grave consequences the protracted fuel supply restrictions may have on the availability of, access and utilization of the Gaza population to food:

- Increase in vegetable prices: In market visits, the assessment team observed that the prices of most vegetables has increased as a result of the increase cost of irrigation from the diesel-operated agricultural wells. Tomato prices, for example, increased over a one week period by more than 500 percent (from NIS 1/kg to NIS 5/kg). Potatoes were also being sold at three times their usual seasonal prices. These increases have further decreased the purchasing power of Gazan households.

[24] OCHA, Gaza Situation Report, April 14, 2008.

- Utilization of food: Unable to purchase cooking gas at the new prices, some of the interviewed households reported that they are resorting to consuming more dry, and uncooked foods, thus further limiting the short menu of food available to them.

- Prices of flour and bread: The continuation of the fuel shortages will inevitably drive an increase in the price of flour produced by the Gaza mills, which will in turn cause an increase in the prices of bread produced in bakeries. The two bakers with whom the assessment team met confirmed that they expect prices of flour and bread to increase by 5-10 percent if the fuel shortages continue. If this price increase materializes, the Gazan households' access to the main food staple will significantly decrease, further exacerbating the food insecurity conditions in the Gaza Strip. It will also significantly increase UNRWA's and WFP's cost of operations as the two organizations depend quite heavily on the Gaza mills in providing flour to their beneficiaries.

- Further reduction in the area under cultivation: The increasing prices of diesel, combined with the reduced productivity and the declining consumers' purchasing power highlighted earlier, have put an additional pressure on more than eighty percent of the farmers who depend on diesel-operated agricultural wells. Several farmers with whom the assessment team met in mid March 2008 and who were re-interviewed in late April 2008 reported that they were forced to let part of their crops perish as they were unable to provide sufficient water to irrigate all the crops due to diesel shortages. One farmer reported that 70 percent of the cucumbers crop he cultivated in the previous month perished due to his inability to secure the needed diesel to operate the agricultural well when it was his turn to receive water.[25]

- Decrease in fishing catch and sea pollution: The scarcity of fuel has made fishing expensive and unviable. Market visits revealed that sardines were scarce and expensive, although it was the height of the sardine season when the market visits were conducted. A kilogram of sardines was being sold at NIS 25, compared to NIS 8-12 in the previous season. Exacerbating the problem is the discharge of sewage into the sea due to lack of sufficient quantities of fuel to operate the sewage treatment plants in the Gaza Strip. Reportedly, 40,000 cubic meters of partially treated sewage continues to be pumped into the sea daily from the Gaza Treatment Plant, due to electricity cuts and inability of the Coastal Water Authority to import a generator to replace the existing low-capacity generator (450 KVA while 900 KVA is required). Another 16,000 m3 of raw sewage is being pumped daily into the sea from the area of Beach Camp.[26] While, the effects of the discharge of sewage into the sea in Gaza have not yet been studied, there are sufficient visible signs suggesting that sea water has become polluted by sewage, which has a strong potential to introduce e-coli bacteria that can cause gastroenteritis and urinary tract infections.[27] The sea around Gaza is visibly darker than further north and has a noxious smell, especially near the sewage outflows. Fishermen interviewed near the sewage outlet in the area of Beach Camp reported that the sewage discharge has killed most sea life in the immediate vicinity, and seriously threatens the sustainability of the fishery industry. They further reported that Gazans are abstaining from buying fish altogether as a result of the visible signs of sea pollution.

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[25] Irrigation water from agricultural wells is supplied on the basis of well-established time-share schedules. Farmers buy water by the hour according to availability and their need. Water is pumped to agricultural lands through an irrigation network that is controlled by valves located at the beginning of each parcel of land. Farmers open these valves when their turn comes to get the water. In many instances, farmers have to operate the wells themselves by pouring diesel into the well's pump.

[26] OCHA, Gaza Strip Fuel Situation Report as of 23 April 2008.

[27] Ibid.

B.4. Internal and External Closures

Internal closures in the West Bank have been causing an economic decline and contributing to the increases in unemployment rates since 2000. These closures (manifested by checkpoints, physical obstacles and the Barrier Wall) have forced transportation costs to go up and limited the access of workers to better jobs within the West Bank, thus limiting their economic capacity to access food. External closures (manifested by the Barrier Wall and complex work permit procedures) have restricted the access of Palestinian workers to jobs in Israel, as well as crippled the economy by limiting the free flow of exports and imports, thus affecting the availability of jobs.

While a comprehensive analysis of the changes in the external and internal closures of the West Bank are beyond the scope of this assessment, anecdotal evidence gathered through focus group discussions and key informant interviews suggests that the established system of internal closures in the West Bank has not been significantly changed in the past year. While highlighting the effect internal closures have had on their ability to travel freely within the West Bank, officials in the localities visited reported that the internal closure system that has been affecting them has not significantly changed in recent years.

"I have been caught three times last year as I was attempting to smuggle into Israel. In the last time, my fingerprints were taken and I was warned that I would be imprisoned for one year if I were caught again. Since then I have not worked, but I also have not thought about smuggling again."

The main change, however, which has been noted by these officials and workers who used to work in Israel has been the tightening of external closures along the route of the Barrier Wall and the completion thereof in several areas where Palestinian workers used to smuggle into Israel in pursuit of employment, limiting access to employment for a large number of workers. Field interviews revealed that the three main segments of the Wall's route where workers used to smuggle into Israel have been completely sealed off last year. In Al-Zawya, local residents reported that some 200 workers (of whom about half are from Al-Zawya itself) who used to smuggle daily into Israel have been made jobless since early 2008 as a result of the completion of the constriction of segment of the Barrier Wall to the southwest of the village through which workers looking for employment in Israel used to smuggle. This was confirmed in interviews with workers from Qalqilya who used to smuggle into Israel using the same segment. Several interviewed workers who used to smuggle into Israel have also reported that the security has been tightened along the route of the Wall in 2007, which has forced many of them to stop smuggling of fear of being caught.

B.4. Recent Natural Calamities

The agricultural year 2007/2008 has witnessed two major natural calamities that have left considerable negative effects on farmers and agricultural workers, further increasing their vulnerability. The winter of 2007 was characterized by below average precipitation rates and uneven distribution of rainfall. Rain fell in few consecutive heavy showers at the beginning of the season, which gradually stopped in mid January, depriving field crops from the natural irrigation they need for survival and growth. The rainfall patterns combined with below average precipitation rates have classified the agricultural years 2007/2008 as a year of drought.

Later in the year, farmers in the WBGS were confronted with several days of frost during early January 2008, which wiped entire fields. In Gaza, frost was followed by strong gusts of easterly winds that further complicated the situation for farmers who had already sustained major damages and bore the brunt of the closure.

As result of the frost and drought, vegetable, meat and dairy products' prices have soared, putting them beyond the economic reach of many households. We shall examine in the following sections the assessment findings in relation to the effect of the above calamities on the livelihoods of farmers and agricultural workers, as well as on he availability of and economic access to food. In doing so, we rely solely on anecdotal evidence gathered through interviews with irrigated and rain-fed agriculture farmers and livestock and poultry farmers.

B.4.1. Frost

While all interviewed farmers, many of whom have borrowed money to prepare and cultivate their greenhouses, in the WBGS claimed having lost all or significant parts of their crops and incurred substantial losses, measuring the impact of the frost was not possible through the assessment. Hence, we shall use several pieces of anecdotal evidence to demonstrate the level of impact on the agricultural sector in general, and on the farmers and on economic access to local agricultural products.

All agricultural crops have been affected by the frost, albeit to varying degrees. The most affected crops, however, were cucumbers, squash, tomatoes, hot peppers and green beans. It was reported in all visited localities where these crops are cultivated that they have largely perished as a result of the frost. Consequently, the availability of these crops in the local market has been very limited, and offered at highly prohibitive prices as shown in the tables below.

Table 6: Changes in the wholesale prices of vegetables in Wadi Al-Far'a before and after the frost

Crop	Price before frost (10 Jan 08) in NIS/Box	Price after frost (20 Jan – 15 Mar 08) in NIS/Box
Tomato	40-30	60-40
Cucumber	50-40	80-70
Potato	30-20	40-35
Squash	55-50	250-150
Hot Pepper	45-35	100-85
Cauliflower	20-18	40-35
Eggplant	30-20	60-50
Broad Beans	50-45	100-85
Green Beans	60-55	150-120
Sweet Pepper	30	60-50

Table 7: Comparison between total sales of various vegetables in Wadi Al-Far'a before and after the frost

Crop	Sales before frost (10 Jan 08) in Boxes	Sales after frost (20 Jan – 15 Mar 08) in Boxes
Tomato	40-60	100
Cucumber	10	40
Potato	100-150	30
Squash	15-20	None
Hot Pepper	4-5	10-15
Cauliflower	30	30
Eggplant	3-5	15
Broad Beans	10-15	20-30
Green Beans	5-8	None
Sweet Pepper	3-5	10

Citrus trees were also affected by the frost, with anecdotal evidence suggesting that between 30-50 percent of the citrus trees in the WBGS having been affected. The effect of the frost on citrus trees has manifested in a drastic reduction in productivity. Anecdotal evidence from Wadi Al-Far'a, confirmed by several agronomists, suggests that frost has caused between 50-70 percent decrease in productivity of the trees hit. In monetary terms, this is equivalent to an average loss of NIS 130 per tree.

Field crops have also not been spared by the frost, as it caused considerable reduction in its growth rates which proved to be detrimental in the wake of the drought that ensued later. The following table provides some indication on how the combination of frost and drought has affected field crops.

Table 8: Production of 8 dunums of field crops in Wadi Al-Far'a in 2007 compared to 2008

Crop	2007	2008	Percentage Change
Wheat	2 MT	400 Kg	80 %
Hay	3 MT	700 Kg	77 %

Seasonal agricultural workers (many of them refugees from the nearby Far'a camp) shared the brunt of the effect with farmers, as they have lost several working days in high season. To show the magnitude of lost employment the following two examples are given: Agricultural workers in Wadi Al-Far'a estimate having worked between 6-13 days in the last three months (out of the usual 70-80 days), thus incurring income losses of NIS 2700-4,000. Moreover, the number of work days lost by agricultural workers in 80 dunums of potato and cucumber farms in Wadi Al-Far'a has been estimated at 24,000 days.

Field observations revealed that several farmers have not re-cultivated their lands or greenhouses due to lack of financial resources and inability to buy the inputs needed for cultivation on credit. Most of these farmers are awaiting to receive the Ministry of Agriculture's emergency relief grant, which only covers 48 percent of the value of estimated losses, to do so.

B.4.2. Drought

It was clear through interviews with field crop farmers that the drought and delayed rainfall have been detrimental to the growth of their crops. Most of these farmers were removing the crops they had planted when they were interviewed, explaining that their crops had been ruined by the drought and that it can only be used as hay for livestock. Indeed, many of them reported feeding their "ruined" field crops to their small ruminants.

Livestock farmers, especially those who depending on spring grazing for feeding their animals, have also been hard hit by the drought. All interviewed livestock farmers highlighted that their ability to graze their animals has been reduced from three months to three weeks at best, which has increased the cost of rearing their animals. Considering the rapid increase in feed prices and reduced demand for animal meat and dairy production as a result of consumers lack of purchasing power, several of framers began selling some of their animals of fear of not being able to provide them with the feed they need. Some of them reduced the period for which they rear animals to cut their costs. Others (especially those in Gaza), opted providing less feed to their animals (these reported that their animals are drastically losing weight and not producing milk as a result of their inability to feed them).

Table 9: Evolution of main indictors related to animal production (based on averages of several field interviews)

Item	Price in NIS (Oct 2007)	Price in NIS (Mar 2008)

Laban (kg)	6	7
Goat cheese (kg)	14	18
Lamb meat (kg)	55	45
Feed – Protein 18	75	95
Wheat	250 JD/MT	700 JD/MT
Sale price of a live sheep	210-215 JD	70-80 JD[28]

The drought has increased the cost of farming for summer crop farmers, who began irrigating their crops as early as February due to the lack of soil moisture, and by doing so increasing the cost of cultivation per dunum by NIS 3780 (i.e. seven month irrigation instead of the usual three or four months). This has caused the prices of summer vegetables to increase above its annual averages, putting some of them (especially tomatoes) beyond the reach of many households.

On the medium term, the drought is likely to directly affect farmers who depend on springs for irrigating their crops, as well as fruit tree farmers (especially almond trees, grapes and almonds) as the productivity of these trees is largely influenced by the amount of rainfall they to which they get exposed. The extra costs entailed in maintaining agriculture will necessarily have to be born by the consumers who might find the price increases beyond his/her capacity.

C. Food Utilization

The assessment has not revealed any noticeable differences between food utilization at the household level between the West Bank and Gaza Strip. It also did not reveal any noticeable differences between refugee and non-refugee households in this regard. The main distinction found between households' utilization of food was mainly related to consumption of fresh vegetables, where it was found that households that reside in rural areas in the West Bank where irrigated vegetable production is abundant are more likely to have more access and utilization of vegetables than other households (as they often can get it for free or for very cheap prices). This conclusions has been reached on the basis of reviewing the reported consumption of the interviewed households from such areas in comparison to the that of other households.

Moreover, the assessment has shown that proper food utilization at the household level in the WBGS is being largely constrained by the households' economic inability to provide nutritious, balanced food for the household members. Most households rely on cheap and limited varieties of food, mostly legumes and bread that lack the essential micro-nutrients needed for maintaining a healthy status. Despite the general tendency by parents interviewed to eat less to provide more food for their children, children are not being provided with the nutrition they need for their development due to their parents' inability to secure a balanced diet. This is most likely the reason why interviewed health professionals in the visited communities reported observing increasing numbers of children (9 – 36 months) and pregnant women who are underweight and have symptoms of anemia.[29]

[28] The reason for the drop in price is because the farmer used to raise animals for five/six months, but now he sells them after 20-30 days after birth, thus reducing animal rearing cost.

[29] All health professionals interviewed during the assessment reported that anemia rates among their patients have been on the rise in recent months. Most of these professionals reported having conducted recent studies on the prevalence of anemia among children in the communities they serve which showed prevalence rates of 60-70 percent. The assessment team, however, could not verify this anecdotal evidence in any of the communities visited. It should be noted here, however, that a recent report (September 2007) by the MoH's Nutrition Department indicated that anemia among children (9-12 months) stood at 77.5 percent and 65.9 percent in the Gaza Strip and West Bank respectively. The latest UNRWA survey on anaemia prevalence among Palestine refugees in the oPt (2006) revealed that prevalence of anaemia among children 6-36 months of age was 57.5%

Proper utilization of food is also undermined by households inadequate food intake practices and weak nutritional awareness. For example, households seem to be incognizant of the fact that consumption of tea and cola drinks limits the body's absorption of iron and essential other micro-nutrients. Households also seem to be unaware of the nutritional value of the food they eat. For example, households who do not consume dairy products do not consume any milk substitutes. Also, several households did not seem to know that cooking a single chicken for nine individuals (i.e. less than 20 grams per individual) is not sufficient from a nutritional perspective to provide the body with necessary protein calories (in fact, most interviewed households consume chicken when they can afford it because they miss the taste as opposed to having a nutritious diet). Moreover, due to heavy dependence on carbohydrates, diabetics are unlikely to benefit from the medicines they take for treatment. Nutritional awareness raising and coaching is very much needed to improve households overall food security.

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in Gaza and 37.1% in the West Bank, while prevalence among pregnant women was 44.9% in Gaza and 31.1% in the West Bank.

III. HOUSEHOLDS' COPING STRATEGIES AND EMERGING SOCIAL PROBLEMS

Interviews conducted within the framework of this assessment have shown that several coping strategies are employed by economically distressed households to deal with the their inability to maintain their livelihoods. Several of these households have been long employed by households, while others have been employed more recently as a result of further deterioration of household conditions. We present in the following sections the main coping strategies used by interviewed households, classified as food-related strategies and general livelihood maintenance strategies.

A. Coping Strategies Related to Food Consumption

A.1. General Decrease in Quality and Quantity of Food Consumed

Households are decreasing the quality and quantity of their food intake. The following points summarize the most common coping strategies used by the visited households in terms of decreasing quantity and quality of food consumed:

- Reliance on one meal per day: Reviewing the weekly food consumption schedule of almost all visited households clearly suggests that these households have only one meal per day, most commonly lunch. Breakfast and dinner, when had, mainly constitute of tea and bread or dried herbs, bread, and tea.

- Purchasing lower-quality foods: There is a general tendency among the visited households to purchase cheap food stuffs to maximize their limited purchasing power. Examples include purchasing canned foods instead of fresh foods, chicken wings instead of whole chickens, and foods nearing the end of their expiration dates. Moreover, many households visited indicated that they shop for vegetables and fruits late in the day when prices tend to drop due to much lower quality. Several of them also mentioned that they buy stale bread from bakeries because it is cheaper.

- Decreasing consumption of fruits, vegetables and fresh meats/Reliance on very limited varieties of food: Almost all households visited claimed that their consumption of fresh vegetables, fruits, and fresh meats has significantly decreased due to their economic inability to purchase them. Fresh red meat (beef, sheep and goat) is hardly consumed by any of the households interviewed. While chicken is consumed by households, it is increasingly being substituted by chicken backs and legs because whole chickens is often considered to expensive.

- Reducing the amounts of food purchased: Some households are coping with their loss of purchasing power by reducing the amounts of foods purchased. Retailers indicated that they often open large packages (10-25 kilograms) of rice and sugar to sell by kilo due to people's inability to afford the entire packages on the one hand, and to reduce the burden of credit they grant to their local consumers on the other.

A.2. Fresh Meat Substitution

Households visited are substituting fresh meats for cheaper, lower-value frozen meats. Households that own livestock and/or poultry such as those visited in Za'tara and Arab A'Ramadin also reported having very minimal consumption of fresh meat.

A.3. Seeking Food Aid

All registered refugee households visited highlighted that their utilization of the food rations they get from UNRWA has increased, and is considered as a main coping strategy for them. Both refugee and non-refugee households (particularly in the Gaza Strip) have been registered with local charitable organizations and non-governmental organizations to benefit from food rations whenever they are available.

A.4. Own-Production of Some Types of Food

Due to their inability to purchase some types of ready foods due to their relatively high prices, some households began making these foods domestically. The most prominent of these foods are bread, white cheese and *Labaneh*, which are usually made powdered milk received from UNRWA and other organizations.

A.5. Scavenging for Food

A few of the interviewed households reported going through the trash bins of poultry shops and retail stores looking for food. While talked about in several of the visited localities, the majority of these households were found and met in Refugee Camps in the West Bank.

B. General Coping Strategies

B.1. Personal Debt

All visited households indicated having accumulated debt to friends, relatives, and local shop owners for a variety of purposes. All of these households revealed that they consider debt as a main coping strategy. Most people are buying food and domestic supplies on credit from local shop keepers and mounting large amounts of debt. With debt accumulating, many shop keepers have reportedly stopped extending credit or put a ceiling on the credit they extend.

B.2. Non-Payment of Utility Bills

The overwhelming majority of households visited had not paid their utility bills (water and electricity) for many months, and consider non-payment of utility bills as a way of "saving money" on the short run.

B.3. Sale of Productive and Unproductive Assets

All households interviewed reported having ran down their jewelry and most other financial assets a long time ago. Some households reported having sold durable goods such as television and radio sets to secure cash. The sale of assets is believed to be a non-extant strategy for most households.

B.4. Decreasing Expenditure on Health and Education

Anecdotal evidence suggests that households are being forced to cut down their expenditure on health care and education to save money. Several households interviewed reported not buying medicine for chronic diseases to ensure that money is available for food. The fact that UNRWA provides health care services explains why decreasing expenditure on health was reported almost exclusively by non-refugee households interviewed. With regard to reducing expenditure on education, the assessment also found that university students are being forced to withdraw due to inability of their households to secure the needed tuition and other fees. Those that remain enrolled are registering for less university credit hours to save money for their households (many of these students register for

> *"This is my second daughter who I could not send to pre-school because I know I cannot pay the NIS 60 monthly fee... If UNRWA charged fees for the schooling of my first daughter, she would be staying at home too."*

as little as two credit hours per semester). Similarly, many households reported inability to buy the needed school supplies for their children, who often get sent back home by their teachers. Others either stopped sending their children to pre-school or did not enroll them altogether due to their inability to pay the fees and send the children's meals.

IV. CONCLUSION AND RECOMMENDATIONS

The prolonged economic crisis in the oPt, the closure regime imposed by the GoI since the outbreak of the Intifada in September 2000, and the recent imposition of export and import restrictions in the Gaza Strip have been causing a severe loss of livelihoods in Palestine. Household interviews conducted within the framework of this assessment strongly suggest that the depth and breadth of food insecurity have increased in recent months due mainly loss of economic access to food resulting from increasing food prices, high levels of unemployment and poverty, and intensification of internal and external closures.

Physical access to food in the West Bank is not problematic as most foodstuffs are available on the market. On the other hand, physical access to food in the Gaza Strip is constrained by the limited availability of certain food items (mainly, meat, dairy products, baby milk and frozen food stuffs) as a result of the import restrictions, and, more recently, by the shortage in fuel supply which has constrained the UN agencies' operations (including food distribution activities), and has been reducing the Gazan population's ability to access markets as well as limiting the capacity of retailers and wholesalers to restock the items in which they trade. The shortages in diesel fuel, which is necessary to operate agricultural wells used for irrigation, has also been causing a reduction in local agricultural production, which in turn has reduced the availability of locally produced agricultural crops and caused an increase in the prices thereof.

Social access to food –made possible by the emergency relief and food assistance programs of UN agencies and other charitable organizations- has been of paramount importance to the livelihood of thousands of Palestinian households, especially in Gaza where employment opportunities are scarce as a result of the closure-induced decline in economic activities. It was evident from interviews that food assistance received from UNRWA, WFP (through MoSA) and other charitable organizations is becoming more important than ever as major source of subsistence for the households that receive it. Almost all households interviewed who receive such assistance on a regular basis reported that the foodstuffs they receive constitute the largest proportion of the food their households consume, which clearly indicates to the significance of food aid as a source of livelihood for Palestinian households.

Notwithstanding the importance of social access to food, the assessment revealed that social access is not enough alone to fully offset the decline in economic access, where almost all interviewed poor households reported not being able to secure a diversified diet for their family members. Although the flow of humanitarian and development assistance from national and international bodies is substantial, it is well below the amount needed to ensure food security for all, especially since most assistance programs are aimed at preventing further encroachment of food insecurity in the WBGS. Field visits and household interviews have shown that many vulnerable households are not receiving any food or other forms of humanitarian assistance, and a large proportion of both the new poor and chronically unemployed receive too little food and cash assistance.

The effectiveness and outreach of assistance programs are being undermined by the global increase in food and fuel prices (which have significantly increased the cost of provision of assistance), the increasing demand for food assistance (fueled by the loss of income), and reduced funding. For example, the cost of WFP's two-year PRRO increased by US$55 million (50 percent) in just six month, as a result of food price and transportation cost increases, which made it impossible for WFP to target the same number of beneficiaries as it had originally planned. Thus, it is highly unlikely that food and other forms of humanitarian assistance will be able to make progress towards food security in the West Bank and Gaza Strip on the medium- and long-term. While necessary to circumvent the further loss of livelihoods of the Palestinian people in the short-term, humanitarian and food assistance programs should coincide with efforts to restore livelihoods and create sustainable income-generating employment opportunities that pave the way for moving towards a more food secure environment. This requires, foremost, the lifting of the closure regime imposed on the West Bank and Gaza Strip, and more specifically, the ending of the restrictions on imports and freeze on exports imposed on the Gaza Strip.

Economic access to food remains the most significant food security concern in WBGS. While strong social ties and traditional social safety nets have precluded the possibility of an acute food crisis, anecdotal evidence gathered through field interviews and official statistics on the socio-economic conditions in the WBGS clearly suggest that food security has been declining in recent months. The recent resumption of payment of PA employees salaries could not offset the effects the food price increases, the continued closure of Gaza, the internal closure of the West Bank and the recent natural calamities, which have created a kind of "market-induced shock" to vulnerable households and are believed to have brought more households closer to the circle of food insecurity.

The three most important factors that are believed to have reduced the Palestinian population's economic access to food are, however: *i)* the rapid increase in food prices; *ii)* the loss of jobs as and income as a direct result of the closure of the Gaza Strip; and, to a lesser extent, *iii)* the tightening of external closure of the West Bank and the completion of sections of the Barrier Wall, which prevented thousands of Palestinian laborers from smuggling into Israel in pursuit of job opportunities. The reduction in fuel supply to the Gaza Strip and the drought and frost that hit hard the agricultural sector the 2007 winter season have also contributed to decreasing the population's economic access to food.

The assessment has shown that households are relying of a variety of coping mechanisms to maintain their survival, including: decreasing the quality and quantity of food consumed (relying on one meal per day, purchasing lower-quality foods, decreasing consumption of fruits, vegetables and fresh meats/reliance on very limited varieties of food, and reducing the amounts of food purchased), substituting fresh meat with cheaper and lower value frozen meat, seeking food assistance, and scavenging for food, living on account, deferring the payment of utility bills, sale of assets, and decreasing expenditure on health and education. However, the assessment has also shown that most of these coping mechanisms have been either been completely or severely exhausted by households in recent months. Anecdotal evidence strongly suggests that the majority of households interviewed have sold all of their productive and unproductive assets, not paid their utility bills in several years, tapped all potential debtors, and reduced their food consumption to the bare minimum; i.e. they can not further reduce expenditure on or consumption of food.

In summary, the food security situation for the Palestinian population remains poor and food insecurity is becoming a real threat to a growing proportion of the population. The tightening of restrictions on the free movement of people and goods in the West Bank and Gaza Strip; the unprecedented and prolonged closure of the Gaza Strip; the rapidly increasing prices of food; the declining productivity of the agricultural sector in both the West Bank and Gaza Strip as a result of natural calamities and Israeli measures; and, the inability of humanitarian organizations to meet the increasing demand for and cost of humanitarian assistance have, combined, been leading to the erosion of the livelihoods of the Palestinian population.

Accordingly, to stop and reverse the trend towards food insecurity, actions need to be taken to improve economic and social access to food through, first, by lifting the restrictions on imports and exports imposed on the Gaza Strip; increasing job creation activities in both the West Bank and Gaza Strip; and lifting the internal and external closure of the West Bank. Given the fact that it will take a long period of time to reverse the prolonged economic decline and reduce unemployment to its pre-Intifada levels, it is of utmost importance that social access to food is increased. This is best done by ensuring continued financial support to UNRWA and WFP's regular and emergency operations, including the 2008 CAP, to enable these organizations to reach out for those who are in need of assistance as well as to ensure that they get their full entitlements.

ANNEXES

Annex 1: List of Individuals and Organizations Interviewed *(alphabetical order)*

Al-Arroub Refugee Camp	
Dr. Ayham Al-Hour and Ms.Amal Turk	UNRWA Health Clinic
Mr. Abdel Azziz Jawabreh	Grocer
Mr. Adel Ibrahim	Grocer
Mr. Ahmad Abu Kheiran, Mr. Fayez Steiti, Mr. Ahmad Qannam	Camp Popular Committee
Mr. Ahmad Abu Taqeya	Emergency Program
Mr. Ahmad Teir and family	Social Hardship Case
Mr. Atta Husein Al-Kutkut	Grocer
Mr. Issa Abu Kheiran	Camp CSO
Mr. Mohammad Abdelsalam Shaheen	Emergency Program
Mr. Musa Qannam	UNRWA Staff
Mr. Yaqoub Abu Nawa and family	Emergency Program
Mr. Yousef Dyab and family	UNRWA Employee
Ms. Alia Salah	Social Worker
Ms. Ra'oufeh Al-Badawi and family	Social Hardship Case
Al-Far'a Refugee Camp	
Dr. Alice Kasbari	UNRWA Health Clinic
Mr. Abdel Khaliq Ghorani	Emergency Program
Mr. Ibrahim Saber	Camp Services Officer
Mr. Khaled Sarhan	Grocer
Mr. Khalil Yousef	Grocer
Mr. Mahmoud Qamar	Agricultural Worker
Mr. Nidal Sawalmeh	Local Committee for Rehabilitation
Mr. Othman Al-Ghoul and family	Emergency Program
Mr. Samer Hafeth Khalil and family	Emergency Program
Mr. Yasser Abu Kishek	Camp Popular Committee
Ms. Hadya Ahmad Abdel Mu'ti and family	Emergency Program
Ms. Laila Sa'ad, Ms. Salwa Shaker, Ms. Fakhreya Abed	Women Center
Al-Mawasi and Khanyounis	
Mr. Abdallah Abu Al-Hasan and family	Laid-off Fishermen
Mr. Abed Rabbo Nofal Abu Al-Hasan and family	Fishermen
Mr. Ahmad Hammad Irjilawi	Grocer
Mr. Ahmad Sa'adouni and Mr. Salim Abu Zeid	Camp Popular Committee
Mr. Akram Abbas Al-Qarm and family	Social Hardship Case
Mr. Ali Omar Malalha and family	Farmer (Animal Production)
Mr. Amin Abdelmajid Yaqoub	Factory Owner
Mr. Fayeq Abu Aker	Wholesaler
Mr. Fu'ad Al-Faq'awi and Mr. Younis Abu Al-Omrain	Camp Services Office
Mr. Fu'ad Mohammad Al-Laham	Non-Refugee Household
Mr. Ibrahim Bader Abu Jarad	Fishermen
Mr. Jamal Abu Al-Naja, Mr. Ramadan Abu Al-Naja and Mr. Suleiman Qahwaji	Cherry Tomatoes Farmers Cooperative
Mr. Khaled Mohammad Abu Mukhaimar and family	Social Hardship Case (UNRWA)
Mr. Mohammad Al-Agha	Khanounis Municipality
Mr. Mohammad Al-Zuq and Mr. Yahya Al-Najjar	Al-Mawasi Charitable Society
Mr. Mufeed Abdel Rahman Majaydeh	Farmer
Mr. Na'im As'ad	UNRWA Health Clinic

Mr. Sa'id Abu Sahloul and family	Social Hardship Case (UNRWA)
Mr. Yahya Al-Najjar and Mr. Mohammad Al-Zuq	Ahali Al-Mawasi Association
Mr. Yasser Mohammad Abu Eid	Farmer (Plant Production)
Mr. Zayed Abu Rizeq	Agricultural Inputs Retailer
Ms. Su'ad Al-Laham and family	Non-Refugee Household
Ms. Wasfeya Abdel Al Al-Najjar and family	Non-Refugee Household
Ms. Watfa Al-Irjilawi and family	Emergency Program
Al-Zarqa	
Mr. Ahmad Jamil Al-Jadba	Farmer (Plant Production)
Mr. Qandeel Saleh Al-Jadba	Farmer (Animal Production)
Mr. Abdallah Mohammad Al-Jadba and family	Non-Refugee Household
Mr. Ala' Al-Issi	Private Sector Employee
Mr. Samir Al-Jadba	Farmer (Plant Production)
Mr. Taha Al-Issi and family	Household of a Worker in Israel
Mr. Salem Kamel Al-Shukri and family	Household of a Worker in Israel
Mr. Majed Atef Al-Issi	Al-Zarqa Charitable Association
Mr. Shukri Al-Shukri and family	Non-Refugee Household
Al-Zawya	
Mr. Ahmad Shuqeir and family	Household of a Worker in Israel
Mr. Bassem Yousef	Grocer
Mr. Khader Hammoudeh	Al-Zawya Village Council
Mr. Ma'en Shuqeir	Farmer (Plant Production)
Mr. Mahfooth Halim and family	Emergency Program
Mr. Marwan Shuqeir and family	PA Employee
Mr. Mohammad Radad	Social Hardship Case (MoSA)
Mr. Mohammad Salem Yousef	Household of a Worker in Israel
Mr. Musa Abdel Khaliq	PA Employee
Mr. Sami Mohammad Shuqeir	Farmer (Animal Production)
Ms. Amani Saleh and family	Farmer (Plant Production)
Ms. Mariam Subhi Abdel Khaliq	Grocer
Ms. Sudqeya Shuqeir and family	Al-Zawya Charitable Association
Arab A'Ramadin	
Mr. Abdel Karim Al-Shu'or	A'Ramadin Village Council
Mr. Ahmad Al-Shu'or	Farmer (Animal Production)
Mr. Ahmad Mihbas	Grocer
Mr. Ahmad Za'arneh	Al-Hureya Ceter for Culture and Arts
Mr. Kamel Odeh and family	Household of a Worker in Israel
Mr. Khaled Za'arneh and family	Household of a Worker in Israel
Mr. Mahmoud Min'em	Farmer (Plant Production)
Mr. Mansour Za'arneh and family	Household of a Worker in Israel
Mr. Musa Ayyad	Farmer (Animal Production)
Mr. Nasser Mihbash and family	PA Employee
Mr. Suleiman Freitekh	Social Hardship Case (MoSA)
Askar Refugee Camp	
Mr. Amer Abdel Min'em Sa'ed	Grocer
Mr. Ayman Zalabya	Camp Popular Committee

Mr. Fu'ad Al-Jarwan	Al-Lod Charitable Association
Mr. Ghassan Abdel Qader Qar'awi	Emergency Program
Mr. Ghazi Salem Al-Sa'di and family	Social Hardship Case
Mr. Jamal Buqeileh	Camp Services Officer
Mr. Nabil Ibrahim Radwan	Emergency Program
Mr. Shadi Mohammad Mahmoud	Social Hardship Case
Ms. Nadia Shihadeh	Askar Charitable Society for Mothers
Ms. Radeyeh Jebril and family	Emergency Program
Beach Refugee Camp	
Mr Ahmad Nour	Grocer
Mr. Azzam Baker	Fishermen
Mr. Hamada Abu Arab	Factory Owner
Mr. Jamal Baker and family	Fishermen
Mr. Jehad Abdel Hadi Salah and family	Fishermen
Mr. Mohammad Maki	UNRWA Clinic
Mr. Mohammad Ubaid and family	PA Employee
Mr. Nabil Bal'awi and family	Emergency Program
Mr. Nasser Hameed and Mr. Ayman Ubaid	Camp Popular Committee
Mr. Shaheen Hamad and Mr. Bassam Sharif	UNRWA Camp Services Office
Mr. Taysir Al-Ustaz	Factory Owner
Beit Hanoun, Beit Lahia and Jabalia (town and refugee camp)	
Mr. Eid Ahmad and Mr. Abdel Malek Ghanem	Chartiable Farmers' Union Association
Mr. Ghassan Qasem, Mr. Ahmad Basyouni and Mr. Amer Quneita	Beit Hanoun Agricultural Cooperative Association
Mr. Ibrahim Fayyad and family	Social Hardship Case (UNRWA)
Mr. Jamal Za'aneen and family	Emergency Program
Mr. Marwan Ali Al-Adham	Farmer (Plant Production)
Mr. Mohammad Abu Rukbeh and Mr. Zeid Zeid	Camp Popular Committee (Jabalia)
Mr. Sufian Musa Hamad	Beit Hanoun Municipality
Mr. Suheil Muhana and Mr. Imad Okal	Jabalia Refugee Camp Services Office
Mr. Taysir Za'aneen and family	Emergency Program
Mr. Wa'el Saleh Al-Ghiben	Farmer (Plant Production)
Ms. Ibtisam Za'aneen	Al-'Atta' Charitable Society
Beit Sira	Beit Sira Village Council
Mr. Ali Abu Safeyeh	Improsined PA Employee Household
---------	Social Harship Case (MoSA)
Mr. Ali Ahmad Abu Safeyeh and family	Grocer
Mr. Ali Rahim Alqam	Refugee Household
Mr. Khalil Rasheed Dar Zeid and family	Farmer (Animal Production)
Mr. Mahmoud Nimer Theeb	Farmer (Animal Production)
Mr. Mohammad Khattab	Non-Refugee Household
Mr. Samir Jaber Khattab and family	Household of a Worker in Israel
Mr. Yaqoub Ahmad Abu Safeyeh and family	Social Harship Case (MoSA)
Ms. Saleemeh Abu Safeyeh	
Deir Al-Balah (City and Refugee Camp)	Social Hardship Case (UNRWA)
Mr. Abdelazziz Abu Shu'aib and family	UNRWA Health Clinic
Mr. Abdelfatah Al-Agha	Deir Al-Balah Municipality

Mr. Ahmad Al-Kurd	Al-Salah Islamic Society
Mr. Ahmad Sabah and Ms. I'timad Timraz	Retailer and Wholesaler
Mr. Faraj Abdelkarim Salem	Social Hardship Case (UNRWA)
Mr. Mohammad Abdelrahman Abu Saif and family	Camp Popular Committee
Mr. Mohammad Badwan and Mr. Mahmoud Hasanat and Mr. Isam Hasanat	Fishermen Union
Mr. Nizar Ayyash	Emergency Program
Mr. Ra'fat Shihadeh and family	Emergency Program
Mr. Rajeh Awad and family	Camp Services Office
Mr. Sami Salhi	Fishermen
Mr. Yousef Al-Aqra'	
Deir Al-Ghsoun	Deir Al-Ghsoun Muncipality
Mr. A'ahed Zanabeet	Farmer (Animal Production)
Mr. Abdallah Najeeb Al-Qulb	Refugee Household
Mr. Ahmad Jamil Ghanem and family	Deir Al-Ghsoun Farmers Association
Mr. Ahmad Mahmoud Ghanem	Farmer (Plant Production)
Mr. Bilal Azziz	Grocer/Wholesaler
Mr. Bilal Zeedan	Farmer (Plant Production)
Mr. Khader Abdel-Rahman Ghanem	PA Employee
Mr. Mahmoud Badran and family	Emergency Program and Social Hardship Case (MoSA)
Mr. Mohammad Ibrahim Badran and family	Deir Al-Ghsoun Charitable Association
Mr. Mu'tasem Badran	
Dyuk & Nuweimeh	Grocery Store of Nuwiemeh Women Association
-----	Agricultural Worker
Mr. Darwish Ibrahin Mohammad and family	Refugee Household
Mr. Dawood Mustafa Mohammad	Dyuk and Nuweimeh Village Council
Mr. Ghaleb A'watleh	Farmer (Plant Production)
Mr. Issa Awwad Bleilat	Refugee Household
Mr. Khader Suleiman	Agricultural Worker
Mr. Mahmoud Abdel Hadi Irmeili and family	Social Hardship Case (MoSA)
Mr. Mohammad Odeh Akakreh	Retired PA Employee
Mr. Mubarak Sammour and family	Farmer (Plant Production)
Mr. Sa'id Mohammad Saleem	Social Hardship Case (MoSA)
Ms. Ali Saleem A'watleh and family	Grocer
Ms. Umm Usama	
Gaza City	Poultry Farmer
Mr. Ahmad Ibrahim Asfour	Suitcase Trader
Mr. Atef Mohammad Asfour	Fishermen Guild
Mr. Mohammad Subhi Al-Hissi	Suitcase Trader
Mr. Musa Mohammad Asfour	Agricultural Inputs Wholesaler
Mr. Nizar Abu Halima	Animal Wealth Cooperative Association
Mr. Salah Abu Hujair	PalTrade
Ms. Hanan Taha	Ard Al-Insan Association
Ms. Najah Zuhud	
Hebron City	Wholesaler
Mr. Ahmad Shawar	Laid-off Employee
Mr. Ahmad Uwaiwy and family	PA Employee - Tikeyet Sidna Ibrahim Al-Khalil

	(Soup Kitchen)
Mr. Ammar Al-Khateeb	Soup Kitchen Beneficiary
Mr. Attaya Al-Jibrini and family	Farmer (Plant Production)
Mr. Ibrahim Issa	Farmers Union Assoiciation
Mr. Jaber Tmeizi	PA Employee - Contract
Mr. Jawad Al-Natsheh and family	Daily Waged Laborer
Mr. Khaled Yousef Abu Sneineh and family	Laid-off Employee - Refugee Household
Mr. Mohammad Jundi and family	Oxfam GB - Food Security Projects Coordinator
Mr. Mustafa Tmeizi	Retailer
Mr. Omar Ahmad Tahboub	Retailer
Mr. Taha Abdulkarim Al-Natsheh	Hebron Municipality
Mr. Yahya Sammour Al-Natsheh	Wholesaler
Mr. Zaki Mahmoud Khatib	Al-Jibrini Dairy Production Company
Mr. Zeyab Al-Jibrini	Hebron Zakat Committee
Ms. Khayreya Khatasha	Refugee Household and Zakat Beneficiary
Ms. Sara Da'ajneh and family	
Izbet Salman	Grocer
Mr. Abdallah Ali Salman	Farmer (Animal Production)
Mr. Ahmad Salim Othman	Farmer (Plant Production)
Mr. Bassam Abu Al-Nimer	PA Employee
Mr. Fares Nimer Abdallah and family	Agricultural Inputs Retailer
Mr. Jalal Yousef Quzmar	Farmer (Animal Production)
Mr. Lutfi Salman and family	Household of a Worker in Israel
Mr. Mohammad Omar Salman and family	Izbet Salman Village Council
Mr. Salman Salman and Mr. Hussein Quzmar	Farmer (Plant Production)
Mr. Subhi Ahmad Quzmar	Farmer (Animal Production)
Mr. Sudqi Nimer	Emergency Program
Mr. Zaki Omar Abu Haneya and	PA Employee
Mr. Zeyad Omar Quzmar and family	Farmer (Plant Production)
Mr. Zeyad Salman	Social Hardship Case (MoSA)
Ms. Husneya Ahmad and family	
Kuza'a	Khuza'a Center for Sustainable Agriculture
Mr. Abdelhalim Ibrahim Qdeih	Laid-off PA Employee
Mr. Ahmad Jaber Qdeih and family	Suitcase Trader
Mr. Ayman Salem Abu Irjeileh and family	Farmer (Plant Production)
Mr. Hameed Khalil Qdeih	Non-Refugee Household
Mr. Mohammad Ibrahim Qdeih and family	Farmer (Plant Production)
Mr. Mohammad Ismail Subuh	Emergency Program
Mr. Mohammad Sha'ban Abu Irjeileh	Farmer (Animal Production)
Mr. Mohammad Suleiman Abu Irjeileh	Youth Without Borders Association
Mr. Na'el Subhi Abu Irjeileh	Grocer
Mr. Suleiman Marzouq Qdeih	Laid-off PA Employee/Social Hardship Case (UNRWA)
Mr. Usama Abu Irjeileh and family	Social Hardship Case (MoSA)
Ms. Nazmeya Abdelazziz Abu Irjeileh and family	Social Hardship Case (UNRWA)
Ms. Nimra Abu Irjeileh and family	
Nablus	Nablus Municipality
Mr. Abdelafo Salem Aker	Grocer

Mr. Abu Ahmad Qadi	Factory Worker
Mr. Bashar Salem and family	Grocer
Mr. Bassam Al-Jayeh	Refugee Household (Emergency Program)
Mr. Ghaleb Madthar (interview with the wife)	Wholesaler
Mr. Mouin Aqqad	PA Employee
Mr. Muwafaq Attout and family	Street Vendor
Mr. Samer Jebril	Social Hardship Case (MoSA)
Mr. Samer Nassar and family	Al-Zalmout Trading Company (Wholesaler)
Mr. Samer Zalmout	Nablus Central Market
Mr. Yahya Al-Sha'ar	Social Hardship Case (MoSA)
Ms. Fatim Qaneir	Zakat Recepient
Ms. Nadia Khatib and family	Refugee Household (Emergency Program)
Ms. Nuha Abu Ouf and family	
Nahalin	Farmer (Plant Production)
Mr. Abdel Rahman Musalam	Farmer (Animal Production)
Mr. Ahmad Khalil	Farmer (Plant Production)
Mr. Ahmad Najajreh	Nahalin Cooperative Association
Mr. Ahmad Yousef Al-Nees and	Household of a Worker in Israel
Mr. Ali Abdel Qader Fannoun and family	Grocer
Mr. Hilmi Shaqarneh	Nahalin Municipality
Mr. Mohammad Ghayatha	Social Hardship Case (MoSA)
Ms. Munira Ibrahim Ghayada and family	Refugee Household - Emergency Program
Ms. Samiha Al-Raqab and family	
Nour Shams Refugee Camp	UNRWA Health Clinic
Dr. Faten Khamash and Ms. Ni'meh Nimer	Emergency Program
Mr. Allam Ahmad Jamal and family	Emergency Program
Mr. Ghaleb Ma'rouf A'ref and family	Camp Popular Committee
Mr. Ibrahim Nimer	UNRWA Camp Services Office
Mr. Jamal Musa	Grocer
Mr. Majed Da'meh	Social Hardship Case
Mr. Mohammad Haykal and family	Social Hardship Case
Mr. Mohammad Jamil Abu Sharqeya and family	Grocer
Mr. Salah Mohammad Yousef	Poultry Shop Owner
Mr. Shihadeh Yousef Abdel Ghani	PA Employee
Ms. Suhad Mas'oud Misbah	Emergency Program
Ms. Zaghlouleh Ali Masheh and family	
Qabatia	Farmer (Animal Production)
Mr Fawzi Abdallah Nazzal	Grocer
Mr. Ahmad Nazzal	Social Hardship Case (MoSA)
Mr. Ayman Saba'neh and family	Reffugee Household - Emergency Program
Mr. Mahmoud Hussein Sweity	Farmer (Plant Production)
Mr. Malek Saba'neh	Qabatia Municipality
Mr. Mohammad Al-Absi	Qabatia Association of Irrigated Agriculture Farmers
Mr. Nimer Nazal	Farmer (Plant and Animal Production)
Mr. Yousef Naji Nazzal	Grocer
Mr. Zaher Mahmoud Naser	Household of a Worker in Israel
Mr.Mohammad Amin Nazzal and family	Qabatia Women Center

Ms. Siham Naser and Ms. Fawzeya Nazzal

Qalqilya City	Farmer (Plant Production)
Mr. Abdallah Sa'id Saleh	Household of a Worker in Israel
Mr. Basri Mahmoud Saleh and family	Farmer (Plant Production)
Mr. Kamel Hussein Muwafi	Palestinian Red Crescent Society
Mr. Khaled Al-Haj Hasan	Wholesaler
Mr. Khaled Shreim	Refugee Household - Emergency Program
Mr. Majdi Khalil Abu Samra and family	Grocer
Mr. Nadim Hiresh Nazzal	Farmer (Animal Production)
Mr. Ra'ed Mohammad Abdelal	Farmer (Plant Production)
Mr. Shakeeb Ahmad Silmi	Wholesaler
Mr. Tawfiq Mohammad Odeh	Al-Amal Charitable Association
Mr. Waleed Nazzal	Qalqilya Municipality
Mr. Yasser Al-Ju'eidi	PA Employee
Mr. Yousef Nazzal and family	Qalqilya Agricultural Cooperative Society for Marketing and Irrigation
Mr. Zeyad Al-Younis and Mr. Mufid Al-Azzouni	Social Hardship Case (MoSA)
Ms. Tharwat Younis and family	
Ramallah City - Central Interviews	Unipal Trading Company
Mr. ______	Ministry of Social Affairs
Mr. Ayman Sawalha	Palestine Trade Center
Mr. Maher Hamdan	Farmer and Poultry Trader
Mr. Mahmoud Tarifi	Livestock Trader
Mr. Marwan Khalili	Wholesaler
Mr. Mitri Zabaneh	Retailer
Mr. Muhannad Hammoudeh	World Vision JWBG
Mr. Nader Duqmaq	Ministry of Agriculture
Mr. Reyad Al-Shahed	Palestinian Fedration of Industries
Mr. Saa'd Al-Khatib	Wholesaler
Mr. Shehadeh Al-Tarifi	Poultry Farmers Cooperative
Ms. Maysara Shu'aibi and Abu Bashir Al-Deek	Palestinian Livestock Farmers Cooperative Union
Ms. Rima' Younis and Mr. Abdel Samad and Mr. Fawzi Radi	
Swedish Village	Fishermen
Mr. Abdelhadi Mohammad Al-Qun	Fishermen
Mr. Attallah Al-Najar	Laid-off Factory Worker
Mr. Awni Al-Qun and family	Social Hardship Case (UNRWA)
Mr. Ibrahim Ahmad Al-Zahouq and family	Farmer (Animal Production)
Mr. Kamel Rajab Abu Odeh	The Chartitable Society for the Development of the Swedish Village
Mr. Majed Al-Qun	Farmer (Plant Production)
Mr. Mohammad Abdelsalam Hassouneh	Farmer (Plant Production)
Mr. Omar Jum'a Abu Shalouf	Emergency Program
Mr. Usama Joudeh Abu Isleimieh and family	Grocer
Mr. Yousef Miqdad	Social Hardship Case (MoSA)
Ms. Siham Ibrahim Al-Zahouq	
Wadi Al-Far'a	Wadi Al-Far'a Village Council

Mr. Hasan Al-Hmoud	Wadi Al-Far'a Women's Charitable Association
Ms. Basima Jum'a	Farmer (Plant Production)
Mr. Mahdi Najeh Zeid	Farmer (Animal and Plant Production)
Mr. Zakarreya Mohammad Janajreh	Farmer (Plant Production)
Mr. Bashar Su'oud Daraghmeh	Farmer (Plant Production)
Mr. Tahsin Al-Hmoud	Farmer (Plant Production)
Mr. Adnan Ahmad Dabaseh	Non-Refugee Poor Household
Mr. Abdallah Mahmoud Ka'our and family	Refugee Household - Emergency Program
Mr. Othman Shukri Jarai and family	Grocer
Mr. Nidal Fathi Abu Salameh	Poultry Shop Owner
Mr. Ala' Taysir Al-'Asous	Agricultural Produce Wholesalers
Mr. Ayman Salahat and Mr. Maher Salahat	Agricultural Worker
Mr. Faysal Hafeth Balayta and family	Wadi Al-Far'a Clinic
Ms. Sa'deya Bani Odeh	Nursery Owner
Mr. Ghassan Jaber Sawafta	PA Employee
Ms. Halima Ragheb and family	

Rafah (refugee camp and town) and Yibna

Mr. Abdallah Al-Haj Yousef	Emergency Program
Mr. Abdel Min'em Khalil Al-Zatmeh and family	Laid-off Factory Worker
Mr. Abdel Min'em Rajab Awadallah	Grocer
Mr. Ahmad Naim Al-Hums	Yibna Charitable Association
Mr. Ahmad Subhi Al-Kurd	Grocer
Mr. Khaled Ashour and Ms. Iftikhar Al-Dibsh	Rafah Refugee Camp Services Office
Mr. Khaled Awad Awadallah	PA Employee
Mr. Majed Al-Agha	Farmer (Animal Production)
Mr. Mohammad Abdel Hamid Shaker	UNRWA Health Clinic
Mr. Mohammad Zu'rub	Rafah Municipality
Mr. Mo'nes Salah Abu Saleh	Agricultural Inputs Retailer
Mr. Said Ahmad Nofal	Social Hardship Case (UNRWA)
Mr. Sami Abu Syam	Non-Refugee household (Laid-off worker)
Mr. Samir Rizeq Hasanein	Meat and Fish Restaurant Owner
Mr. Zeyad Yousef Sarafandi, Mr. Zuhair Khalaf, and Mr. Hani Mansour	Rafah Refugee Camp Popular Committee
Ms Sa'deya Al-Jamal	Social Hardship Case (UNRWA)
Ms. Latifa Mohammad Al-Daya and family	Social Hardship Case (UNRWA)
Ms. Wafa' Marzouq Barhoum and family	PA Employee

Za'tara

Mr. Ahmad Khalil Abu Reeda and family	Farmer (Plant Production)
Mr. Ahmad Salem Mubarak and family	Farmer (Plant Production)
Mr. Ali Ahmad Sahouri and family	Refugee Household - Emergency Program
Mr. Atta Ahmad Dannoun	Farmer (Animal Production)
Mr. Mohammad Duwaib and Mr. Taha Hussein	Za'tara Muncipality
Mr. Mohammad Omar Duwaib and family	PA Employee
Mr. Samer Mubarak	Grocer

Annex 2: Terms of Reference

WFP / FAO / UNRWA
10 March 2008

Terms of References for a Rapid Needs Survey in West Bank and Gaza Strip

1. Background

A Comprehensive Food Security and Vulnerability Analysis (CFSVA) was carried out in 2006 by FAO and WFP in West Bank and Gaza Strip, a Food Security Assessment was conducted by FAO and UNRWA in May 2007 (as part of the inter-agency Palestinian Public Perception 11th survey - PPP 11) and a Rapid Food Security survey was undertaken by WFP and Al Sahel in October 2007 in order to gauge changes in the food security of the Gazan non-refugee population as a result of the import restrictions and export freeze triggered by the June 2007 Hamas take over of the Gaza Strip. The prolonged economic siege imposed to the Gaza Strip, the recent increase in Israeli military incursions causing loss of life and infrastructures, the shortage of fuel, the unavailability of income sources (particularly, the massive crisis in the private sector and agriculture) and diversified options and rising food market prices are causing a steady deterioration of livelihoods in Gaza Strip that needs to be addressed at the earliest.

Furthermore, the unstable political outlook –marked by a polarization between Hamas and Fatah since June 2007- coupled with a stepped up Israeli military action, is putting at risk the livelihoods in the West Bank as well which have been severely impacted by the separation wall and recently hit by dry spells and frost affecting the Eastern slopes and the southern areas.

Despite the Paris conference prompted large donors' pledges –totaling USD 7,4 billions- to fund the PRDP, there is an immediate need to assess the appropriateness of current safety nets and the levels of humanitarian assistance needed. The rapid needs survey proposed herewith will inject vital quantitative and qualitative data in the planning of WFP/UNRWA/FAO interventions in a fast changing and unstable environment and provide valuable information for advocacy purposes and appeals.

2. Rationale

Therefore, a rapid household-level survey will be administered to a sub-set of the target population both refugees and non refugees in order to (i) measure the evolution of the food patterns, (ii) evaluate consumers and traders (including supply chain) coping mechanisms in light of global and local market price increase as well as climatic factors (dry spells and frost), (iii) assess livelihoods' adaptation to the closure/high prices in West Bank and to import/export restrictions and renewed military incursion in Gaza Strip, and, (iv) assess the role of assistance in household coping mechanisms

In specific, the reduced HH questionnaire (max 2-3 pages) will be focused around three main modules on variations in income, expenditure and food consumption patterns, coping strategies and food substitution effect. Given the short timeframe for the survey, the level of data dis-aggregation will be at macro area (North, Center and South West Bank and Gaza Strip), refugee / non refugees, refugees inside and outside of camps).

An additional qualitative component carried out through focus groups interviews and key informants (with various stakeholders) meetings will complement the primary household data information and produce a decision matrix in order to allow a severity ranking list at governorate level for programming purposes.

As such, in order to triangulate the findings of the primary data collection, a series of community level focus group interviews will be carried out in order to include a qualitative component that will shed light on the changes in livelihood patterns being employed in the last 8 months as a reaction to the unfolding political and economic events.

The rapid needs survey will provide ad interim findings until the result of the larger PalSEM study become available.

3. **Objectives**:

- To assess the changes in food patterns, coping mechanism including assistance), market functionality and livelihoods in the aftermath of the recent escalation in violence and extended economic downturn in Gaza Strip
- To gauge the resilience of West Bank population (including the role and contribution of assistance) in the wake of prolonged closure regime, recent climatic shocks (dry spells and frost) as well as market induced shocks (high cereal, fodder and water prices) which are hampering the traditional farming and herding livelihoods
- To profile population groups most vulnerable to the above risks, considering their resilience and level of exposure to risk.

4. **Outputs**:

The expected outputs of the consultancy services will be as follows:

4.1 Quantitative survey:

- Identify the population sample design (refugees and non refugees HHs) and execute stratified sampling –possibly, in close consultation with PCBS

- Finalize the questionnaire (provided by the participating UN agencies) with technical support by WFP/UNRWA/FAO

- Field test the questionnaire

- Carry out field work in Gaza Strip and West Bank on a representative sample of the households

- Carry out data entry, cleaning and coding

- Submit the main indicators’ output tables accompanied by a short narrative analysis

4.2 Qualitative Study:

- Undertake a qualitative study composed of key informants’ interviews and focus groups to most affected communities in order to ascertain the coping mechanisms utilized and produce a severity ranking list of the most affected governorates and socio-economic groups.

4.3 Focus groups interviews should be administered to the following groups/communities in Gaza Strip:

1. Farmers (cash crops and traditional farming)
2. Fisher folk
3. Laid off employees
4. Traders
5. Petty traders
6. Whole sale retailers
7. Small retailers
8. Government employees
9. Communities affected by recent military incursion
10. Health officials/hospitals
11. Cooperatives
12. Local active NGOs
13. UNRWA and MOSA SHCs
14. Chronically unemployed
15. Other

4.4 Focus groups interviews should be administered to the following groups in West Bank:

1. Communities most affected by the wall/closure/checkpoints (Qalqaliya, Hebron, Nablus, etc etc)
2. Farmers and herders communities affected by the recent climatic shocks, such as dry spells and frost in identified governorates
3. Traders behavior and food supply chain in the wake of global market increase and back to back procedure on commercial transport
4. Government employees
5. Private sector employees
6. (UNRWA to add relevant refugee-specific socio-economic categories)

5. Timeframe:

Given the highly volatile situation in the Gaza Strip and the need to rapidly assess the humanitarian implications of the unfolding crisis triggered by the June 2007 events on food security and in order to ascertain changes in the food patterns in the West Bank too, <u>it is of utmost importance that the whole exercise is carried out within 30 days.</u> If the proposed timeframe cannot be achieved, this needs to be communicated before engaging further in the consultancy:

- Third week of March 2008: start of field work and start of data entry in sync with data collection
- 2nd week of April 2008: completion of field work, data entry and data cleaning completed. Submit clean database in SPSS to contracting agencies by 16 April.
- Quantitative output tables with short narrative and qualitative report to be submitted to participating UN agencies by 20 April
- 27 April 2008 submission of the final draft of the study