Gaza Strip Food Supply Report April 2024

The FEWS NET Gaza Strip Supply Report for April 2024 is a companion report to the forthcoming FEWS NET Gaza Strip Targeted Analysis Update for April 2024. The Supply Report provides an update to the food supply information detailed in FEWS NET's previous [Targeted Analysis of the Gaza Strip](), released in March 2024. The forthcoming Targeted Analysis Update for April 2024 will provide integrated analysis of evolving acute food insecurity outcomes, drawing from the food supply analysis and other available sources of evidence.

Gaza food supply assessment, as of April 2024

Key Messages

- The amount of food supplied to Gaza has notably increased in March and April compared to February. The number of trucks entering with food via Rafah and Kerem Shalom border crossings and the number of airdrops have both significantly increased in recent months. However, the distribution of food supplies across the territory is extremely constrained. Many markets are no longer functioning, and food prices remain extremely high.
- The majority of food entering Gaza is transported by trucks via the Rafah and Kerem Shalom crossings in the south. Manifest data for trucks at these crossings, provided by the United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA), serves as a valuable proxy estimate for the metric tonnage (MT) of food within Gaza. Since March 2024, the average number of trucks entering Gaza has increased to 171 per day. Of these, around 64 percent carried food, bringing an estimated 80,000 to 88,000 MT of food into Gaza in March and April combined. Around 90 percent of this food is from humanitarian aid deliveries, with only 10 percent from commercial trucks.
- Based on FEWS NET's analysis of publicly available information, Gaza has also been supplied with food through approximately 81 airdrops that delivered an estimated 2,866 MT of food between February 26 and April 25. This is contributing to the supply of northern Gaza, though total amounts of food remain low and distribution following the air drops is difficult to ascertain.
- While food supply within Gaza has increased in April, the supply of food across the territory remains extremely challenging. Constraints include shortages of approved trucks and drivers; conflict and strikes on aid groups; limited storage; and – particularly in the north – Coordination of Government Activities in the Territories (COGAT) denial or delay of humanitarian convoys which has resulted in nearly half of missions in March being denied, postponed, or withdrawn.
- Market functionality is severely constrained in Gaza, with significant variation between northern Gaza and Rafah. While markets are more functional in Rafah, formal and informal markets across Gaza have faced severe stock shortages. Most stock replenishment is reportedly from the resale of humanitarian aid, rather than through traditional wholesale channels.
- Food prices in Gaza have continued to surge and fluctuate dramatically in March and April, with individually reported prices demonstrating variability. In March the cost of a 25 kg bag of flour reached up to 400 USD in Gaza City, while in April one report listed the price for 25 kg of flour at 18 USD, down from 530 USD. Indications are that prices remain elevated but are starting to show important reductions as supply improves. While deliveries of wheat from the Erez gate led to the reopening of some bakeries and put the sale of bread at significantly lower prices in these locations, prices continue to be volatile based on changes in food availability.

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Overland Shipments

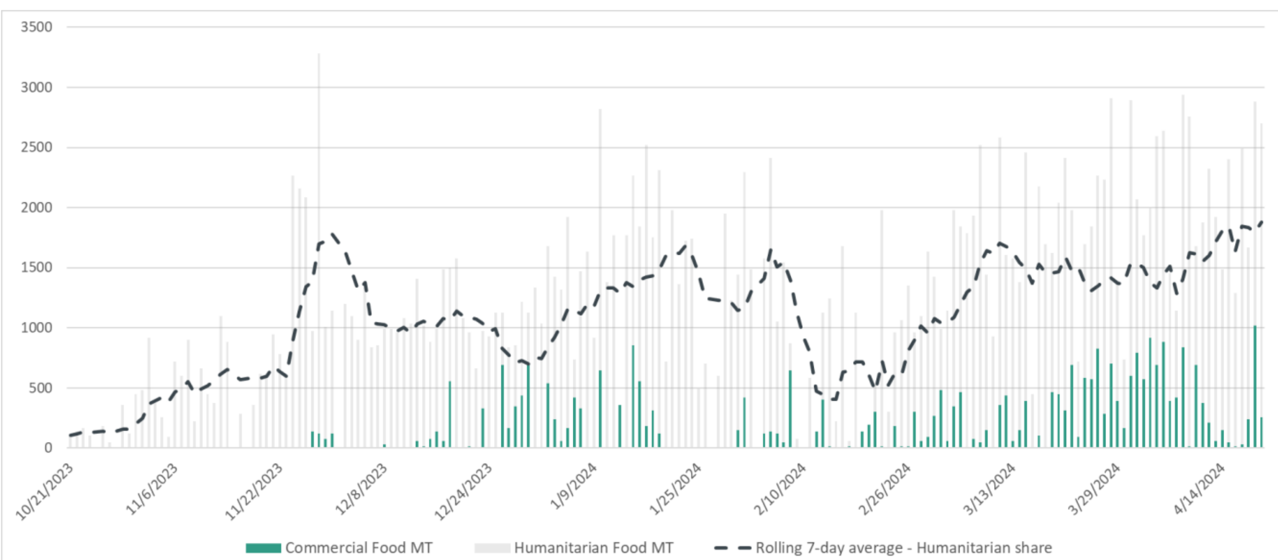
Analysis of UNRWA Truck Data

The United Nations Relief and Works Agency for Palestine Refugees in the Near East (UNRWA) publishes manifest data for all trucks that enter Gaza through the Rafah and Kerem Shalom crossings in the south. The majority of food and supplies that have entered Gaza since October 7 have been through these two gates. Between October 21 and April 20, an average of 124 trucks entered Gaza each day. Since March 2024, however, the average has been 171 trucks per day, signifying an increase in recent months. Of the approximately 8,700 humanitarian and commercial trucks that entered Gaza since March 1, roughly 84 percent contained humanitarian aid while 10 percent transported private sector cargo (Figure 1). Approximately 64 percent carried only food items, while the remaining trucks carried either medical supplies, non-food items, or mixed items.

Manifest data for trucks entering Gaza list the total cargo MT, as opposed to a breakdown of MT per item type. To estimate total MT of food entering on trucks, FEWS NET and other agencies must make standardized assumptions about the breakdown of cargo. The analysis below used reported estimates for the weight of pallets and packaging to calculate an average MT of food per truck, and an estimate for the percentage of food on trucks carrying mixed items, presenting a total MT range to account for assumptions made in the process.

Food trucks entering Gaza in March and April have carried an estimated 13-14 MT of food per truck on average. In March, 3,728 trucks carrying food or mixed items entered Gaza through the two southern gates, carrying between 43,000 - 47,000 total MT of food. In April, 2,868 trucks carrying food or mixed items entered, carrying between 37,000 - 41,000 total MT of food. Figure 1 below shows the trend analysis for estimated MT of food delivered. Based on a review of manifest data, it is safe to assume that a significant amount of the food entering Gaza on trucks through Kerem Shalom and Rafah crossings is wheat flour.

Figure 1 **Estimated metric tons (MT) of food entering Gaza each day and in 7-day rolling averages from commercial and humanitarian sources, October 21, 2023 – April 20, 2024**



Source: FEWS NET analysis of UNRWA data

As outlined above, these data provide a proxy estimate for MT, not an exact count, and these data have limitations in addition to the assumptions required for MT estimates. Firstly, there are significant challenges in transporting food effectively across Gaza given insecurity and access restrictions, particularly in the north and areas of Khan Younis. Secondly, the amount of food entering Gaza does not equate to the amount being consumed by those in need. For more information on FEWS NET's analysis of this, please see the full list of monthly food security reports on Gaza.

Commercial Trucks

Between October 7 and late November, commercial trucks were not permitted to enter Gaza. From the reopening to commercial trucks in late November to April 20 a total of 2,259 commercial trucks (10 percent of all trucks), averaging about 23 trucks per day, have entered via Kerem Shalom and Rafah crossings (Table 1). Among these, 87 percent transported food, with the remaining 13 percent carrying non-food items.

Table 1 **Private trucks entering Gaza since November 2023**

Month	Number of commercial trucks carrying: Food items	Medical supplies	Mixed items	Non-food items	Total
November 2023	18	3	8	14	43
December 2023	228	0	1	10	239
January 2023	316	0	0	19	335
February 2024	221	1	0	24	246
March 2024	608	2	5	115	730
April 2024	570	1	1	94	666
Total	**1,961**	**7**	**15**	**276**	**2,259**

Source: FEWS NET analysis of UNRWA data

Challenges Entering through Kerem Shalom and Rafah

To enter Gaza through the Rafah and Kerem Shalom crossings, commercial and humanitarian shipments face notable constraints. Firstly, trucks may face denial of entry. FEWS NET does not have access to datasets tracking trucks denied entry at borders; however, information available from the Logistics Cluster compares the number of manifested trucks to actual crossings at Kerem Shalom and suggests that in March only 55 percent of UN and INGOs trucks completed the crossing at that entry point and on March 27, in particular, "150 trucks were manifested, but only 56 crossed." Secondly, border crossings have at times been fully closed. UN OCHA reports that from late January through the end of February "the Kerem Shalom crossing was inaccessible on no less than 16 occasions, with Nitzana facing closures on at least 10 different days due to protests and insecurity." This improved in March when Rafah and Kerem Shalom crossings were both open for 30 days. Lastly, complications, delays, and restrictions in the approval process continue to constrain the supply of food to Gaza. A March 8 briefing note from ACAPS reports that at the time, obtaining entry permission for humanitarian trucks could take two to three weeks, and that entire trucks can be rejected if one pallet or item is incorrectly logged.

Entry Gates in Northern Gaza

With mounting pressure to improve food availability in northern Gaza, the Israeli Defense Forces (IDF) began permitting limited direct entrances into the north in March. The first of these is Gate 96. On March 12, in a trial initiative, a convoy of six trucks escorted by the IDF transported humanitarian aid through Gate 96 to northern Gaza. Following this initiative there have been no additional public reports that aid has passed through this gate.

The second crossing into northern Gaza to be opened was the Erez crossing, which Israel agreed to open earlier this month. The first shipments through the Erez crossing were three WFP convoys on April 14, 15, and 16, with 25 total trucks carrying around 404 MT of food parcels and wheat flour. On April 25 a WFP official reported that in the past three weeks "from seven to 12 WFP food trucks are crossing into northern Gaza every two to three days." However, without public manifest tracking similar to the southern gates, it is not possible to estimate the total MTs of food supplied by all missions.

Air drop and maritime corridors

Air drops

Air-dropped food is a tool generally used for supplying targeted, hard-to-reach populations because of the cost and limited weight that can be delivered, as well as the inability to control and precisely target distributions. In January and February a small number of air drops over Gaza were carried out by France and Jordan and the United Arab Emirates (UAE). In March, the number of airdrops significantly increased as the United States (at times in collaboration with Jordan) and the UAE (in collaboration with Egypt and Jordan), started almost daily air drops in northern Gaza.

FEWS NET conducted an analysis to estimate the total MT of food likely dropped in northern Gaza from late February through April 25 (Tables 2 and 3) based on public confirmations of air drops. Several assumptions and calculations are required to determine the likely MT of food supplied through airdrops. For instance, some cargo is listed as total MT of aid delivered and does not include a breakdown of food versus non-food items. In these cases, a standard percentage of food is assumed (70 percent food). Given data constraints, this analysis should be seen as an approximate estimate, not a precise determination of food delivered via airdrops.

Table 2 **Publicly reported airdrops completed in late February and March**

March	Total airdrops this week	Total estimated MT of food dropped
February 26 – March 2, 2024	3	58
March 3 – 9, 2024	8	252
March 10 – 16, 2024	11	213
March 17 – 23, 2024	6	125
March 24 – 31, 2024	16	565
TOTAL	**44**	**1,213**
Source: FEWS NET analysis of UNRWA data		

Table 3 **Publicly reported airdrops completed in April**

April	Total airdrops this week	Total estimated MT of food dropped
April 1 – 6, 2024	15	618
April 7 – 13, 2024	13	652
April 14 – 20, 2024	3	120
April 21 – 25, 2024	6	263
TOTAL	**37**	**1,653**
Source: FEWS NET analysis of UNRWA data		

Between February 26 and April 25, a total of 81 airdrops have been publicly recorded, delivering approximately 2,866 MT of food aid. Many US airdrops contained 38,000 Ready-to-Eat Meals (MREs), though some included as many as 50,600 MREs. Most recent UAE airdrops contain between 60 and 82 MT of total aid, including non-food items. Each air drop now delivers, on average, an estimated amount of food comparable to the MT carried by three to four trucks of food.

Air drops represent an important increase in food supply for the north. However, to contextualize the utility and efficiency of supplying food through these means, it is important to consider challenges related to air dropped supplies. First, for those delivered near the coastline, some parcels land in the water. It is not possible to know what percentage, if any, of these are recovered by those on the ground and, if so, whether all or some of the food remains edible. The United States is the only government reporting bundles that have landed in the sea: in April, the US reported 50 bundles are estimated to have landed in shallow waters or at sea. This is a negligible amount of total food delivered via airdrops but is one of the many possible ways in which food losses may occur. Additionally, information on any subsequent distribution mechanisms is unavailable, and it is unknown how the food and other assistance is then distributed across the population or supplying markets.

Maritime Corridors

In March, the first shipment of food aid via a maritime route from Cyprus transported 200 MT of food to Gaza to a temporary jetty north of Al Zahra constructed by World Central Kitchen (WCK). The shipment contained cargo approximately equivalent to that of 14 trucks[1], each carrying approximately 14 MT (Table 4). At the end of March, a second convoy of three ships carrying 400 MT of food departed Cyprus; however, only 100 MT had been unloaded when seven WCK staff were killed in an IDF airstrike on April 1. The remaining ship returned to Cyprus without unloading it's cargo. The ships carried ready-to-eat items like rice, pasta, flour, legumes, canned vegetables, and proteins that could be used to prepare more than 1 million meals. WCK and Open Arms suspended deliveries to Gaza following the air strike and did not operate in Gaza in April. On April 28, WCK announced it would resume assistance in Gaza with Palestinian staff only. They confirmed having 276 trucks with the equivalent of 8 million meals "ready to enter Gaza" and that the organization will "continue to explore" shipments using the temporary jetty for supplies.

Table 4 **Total direct maritime deliveries of supplies in March and April**

Date of delivery	Total maritime deliveries this week	Total MT of food delivered
March 15, 2024	1	200
April 1, 2024	1	100
Grand Total	**2**	**300**

Source: FEWS NET analysis of public delivery reports

The UAE has also sent aid through several maritime operations that land at Egypt's Al Arish port. This assistance entered Gaza through the gates at Kerem Shalom and Rafah and is accounted for in the UNRWA truck data analyzed above.

An additional sea-based route was opened in April when Israel agreed to the use of Ashdod port for deliveries, to be trucked into Gaza through the Kerem Shalom crossing. This announcement was made following a direct conversation between US President Biden and Prime Minister Netanyahu on April 4. Ashdod Port is one of Israel's primary cargo terminals, located at the mouth of the Lachish River about 40 kilometers south of Tel Aviv. It has the highest annual cargo container volume among all Israeli ports, totaling 1.525 million TEU in 2017. The first aid shipment to Gaza via the Ashdod Port was transferred on March 10. Eight WFP trucks carrying flour entered via the Kerem Shalom crossing.

On March 7 during the State of the Union address, President Biden announced the construction of a temporary dock along the Gaza shoreline to facilitate large-scale delivery of humanitarian aid. On April 25, the Pentagon confirmed that construction has begun on the pier, with the goal of enabling the delivery of up to 150 trucks daily. Completion of construction on the pier, which will be located near Wadi Gaza, is anticipated in early May. It is not clear which entity will be responsible for unloading and transporting the aid from the dock to the shore. Two days after confirmation that construction had begun there was a mortar attack on the Israeli troops preparing the staging area for the pier.

While sea-based shipments can deliver significant amounts of food, all aid must then be transferred to trucks for distribution (or delivered in trucks on the ship) and therefore still require safe passage, approval of movement, drivers, trucks, clear roads, and warehousing. While these efforts by international governments and aid agencies to open air and sea routes for delivering food

[1] Based on manifest data from October 21, 2023, to March 3, 2024, each food truck contained approximately 14 tons of food.

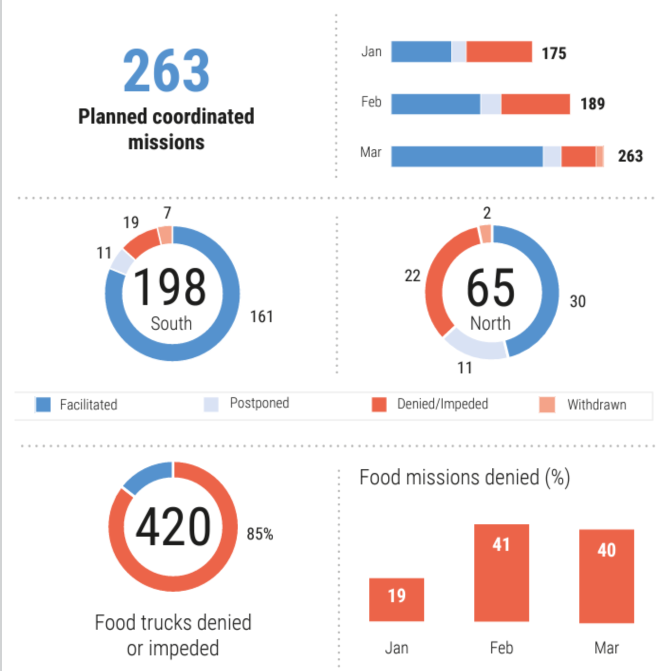
and supplies to Gaza have provided essential food, humanitarian assistance agencies have repeatedly stated that land deliveries are still considered the most efficient, scalable, and cost-effective option for improving food supplies in Gaza.

Internal Supply Challenges

Entering Gaza is only the first step in the complex process of getting food supplied across the Strip. Distribution within the territory faces several significant challenges. On April 23 the US State Department's Special Envoy for the Middle East reiterated the urgency of these challenges saying that attention needs to be paid to the distribution of food within Gaza.

Firstly, items entering Gaza are reloaded onto other trucks which extends the length of time needed to get to various final destinations. UN OCHA reported in March that "shortage of approved trucks and drivers continue to result in considerable delays." Secondly, access for supplying food in Gaza is further complicated and slowed by the risk from Israeli air strikes. On April 25 the New York Times reported on evidence they had reviewed for at least six instances where foreign aid groups had followed the IDF's coordination procedures for deconfliction and were still hit by Israeli strikes. The Euro-Med Human Rights Monitor documented the killing of at least 523 Palestinians at aid distribution centers between January 11 and March 23. Transportation of food must also contend with significant amounts of rubble – the United Nations Mine Action Service estimates 37 million tons of debris – and unexploded ordinances to safely move through the territory. Convoys also face difficulties moving swiftly and safely due to crowds. In the worst instance, over 100 people were killed by the IDF when crowds rushed a convoy in late February. Thirdly, storage for food aid is limited due to damage. According to the Logistics Cluster, out of the 43 warehouses in Gaza that were operational before the war, only 22 were functioning at the end of March, and an April report stated that the UN had 20 warehouses in Gaza. Lastly, to supply food to the north, COGAT must approve humanitarian convoys. OCHA has been tracking the number of planned missions to the north alongside those postponed or denied. In March, 53 percent of missions were denied, postponed, or withdrawn (Figure 2). Between April 1 and 19, 15 percent (27 out of 181) of aid missions to northern Gaza and areas in southern Gaza requiring coordination encountered denial or delay by Israeli authorities.

Figure 2 **Gaza Access Statistics through March 31**



Source: UN OCHA

Agriculture

Before October 7 most Gazans relied on imported food and humanitarian assistance as their primary food sources; local agricultural production comprised a significantly smaller source of food and was only particularly relevant to the approximately 3 percent of the population living in rural or semi-rural areas. Furthermore, a significant portion of domestic agricultural production comprised fruits, vegetables, and olives, which, while contributing micronutrients, cover an extremely small portion of minimum calorie requirements.

As of March, around 55 percent of agricultural land in the north has become entirely unusable, along with half of all greenhouses; in addition, irrigation infrastructure suffered substantial damage. Most of the agricultural land has been inaccessible during critical planting and harvesting seasons, resulting in a substantial loss of Gaza's capacity to produce vegetables and fruits. Moreover, the production of wheat, which is the main field crop in Gaza, primarily took place in North Gaza and Khan Yunis, which have seen massive displacement and significant damage.

In 2024, no new planting has occurred, as organizations report that households have largely consumed their remaining seeds. Livestock holdings have been devastated, with 90 percent of poultry farms destroyed, and farmers are struggling to find fodder for surviving livestock. In February it was reported that some households were resorting to consuming remaining animal feed as an alternative food source. Although there have been reports of Israel reopening fishing areas within 6 nautical miles of the shore, few of the 4,000 Gazan fishermen registered before the crisis have the resources or equipment to engage in fishing due to extensive damage to fishing boats during the conflict.

Agricultural activities have essentially ceased in Gaza under the combined effects of the massive displacement of the population from the north to southern Gaza, as well as the overcrowding in Rafah, security concerns and risk of IDF attack when moving outside of specified civilian areas, damaged agricultural lands, and Israel's prohibition of the entry of essential inputs. Though data is not available on food remaining from local production, it is a reasonable assumption that the reduction in agricultural activity in 2024 combined with the small contribution of local production to diets prior to the war means locally produced foods are not contributing meaningfully to supply.

In addition, reports continued into late March and April of Gazans harvesting, selling, and eating wild foods and animal feed in the absence of or inability to purchase sufficient food. This serves as an indicator of low access to and/or available supply of other more preferred and commonly consumed foods.

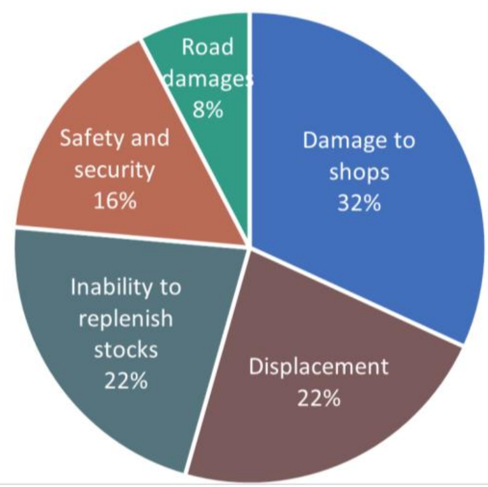
Markets in Gaza

Market Functionality

The market situation in Gaza is dire, with scarcity of goods and high and often volatile prices, as well as security concerns and approvals affecting the movement of goods and people. The most recent survey of market actors published by WFP was in February, and reported that "87 percent of surveyed informal shops and 71 percent of surveyed formal shops reported restocking items through the purchase of goods from households. On the other hand, just 20 and 16 percent of formal and informal shops, respectively, used wholesalers to replenish their stocks." This suggests humanitarian aid is being resold in markets, as has already been widely reported.

FEWS NET's March Targeted Analysis highlighted that market functionality and household access to markets varied significantly across Gaza, with negligible function of formal markets in northern Gaza and limited formal market function in southern Gaza. This was based on WFP survey data from January. A new round of survey data from February, covering 476 vendors in Deir al Balah and Rafah, indicates significant shifts in the function of formal markets in southern Gaza. Very few formal shops continued to operate anywhere in Gaza primarily due to damage to physical infrastructure, displacement of shop owners or staff, and inability to replenish stocks (Figure 3). Roughly one third of informal vendors indicated that they used to operate formal shops. (See Annex A for details on market functionality by governorate).

Figure 3 **Reasons of transitions of formal shops to informal street vendors, February 2024**



Source: Adapted from WFP

The damage to market infrastructure, roads, and limited commercial inflows has severely degraded every aspect of the operating environment for markets. In addition, the IDF's targeting of Gazan police forces has led to the use of non-state community groups to provide security for markets and food distributions. In Rafah, the "Popular Protection Committee" has taken up formerly state-administered functions such as enforcing price ceilings and directing traffic.

Market Stocks

Fresh produce, wheat flour, eggs, bottled water, dairy products, and non-food items were reported as rare among vendors in the February WFP survey. Both formal and informal markets continue to face severe stock shortages. Most formal (51 percent) and informal shops (49 percent) reported a decrease in their food stocks. Furthermore, 23 percent of formal shops and 20 percent of informal shops had completely run out of food stocks. Most shops regularly run out of eggs and dairy products, as well as vegetable oil, vegetables, rice, and pulses. Wheat flour and canned foods are more abundant and more frequently replenished.

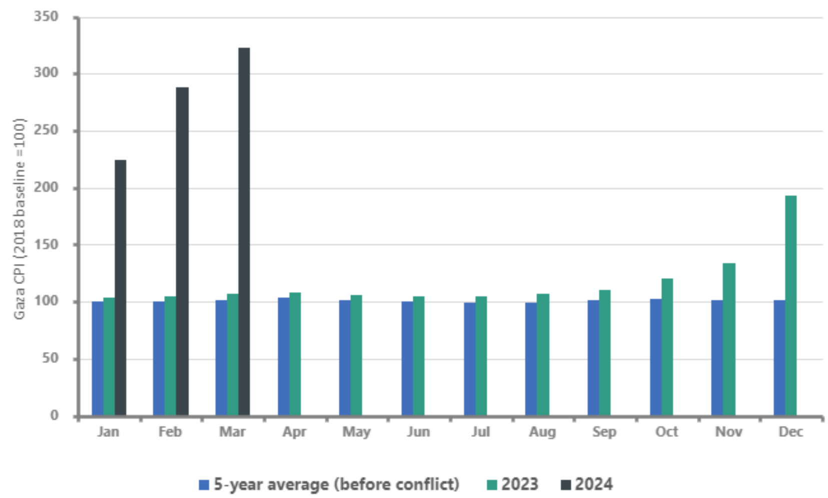
There are reports of improvements in stocks in April, likely associated with the March and April increase in humanitarian assistance, however supplies remain unstable and unpredictable.

Prices

According to the Palestinian Central Bureau of Statistics (PCBS), monthly inflation increased sharply in March, rising by 25 percent from February (Figure 4). The food CPI has risen by about 194 percent since the crisis onset (from 109 in September 2023 to 322 in March 2024).

Food prices in Gaza are volatile and fluctuate based on the availability of supply from limited commercial inflows and household resale of humanitarian goods to vendors. WFP's last market survey from February reported prices significantly above September 2023 levels (e.g., onions at 1733 percent, eggs at 686 percent), though some commodities showed signs of price stabilization with improving supply. In March and April, reports indicate that unpredictable and elevated prices persist. A March 22 report notes the cost of a 25 kg bag of flour reaching up to 400 USD in Gaza City, and basic items like onions and sugar experiencing spot price increases of 50 and over 26-times their pre-war prices, respectively. In April, one report listed the price for 25 kg of flour at 18 USD, down from 530 USD, and 1 kg of tomatoes at 3.95 USD, one tenth the previous price[2]. These prices are still elevated but are starting to show important reductions as supply improves.

Figure 4 **Food inflation in Gaza, pre (1-year and 5-year averages) and post (October 2023-April 2024) crisis**



Source: FEWS NET analysis of UNRWA data

In the past month, WFP reports that 16 bakeries opened in Gaza, including four in northern Gaza following deliveries of wheat flour through the Erez gate between April 15 and 17. WFP estimates that these bakeries are delivering 60,000 bags of bread a day. This created significant price relief; as of April 15, bread was being sold for 5 shekels, a drastic decrease compared to the 20-fold increase previously observed. The ongoing operation of these bakeries is uncertain, however, and dependent on the availability of flour and consistent humanitarian aid deliveries.

[2] In the absence of recent price data sets, individually reported prices are useful in demonstrating how inconsistent and variable supply is driving price spikes.

ANNEX A

Market Functionality by Market Basin

Market Basin	Status	Change since December	Key Issues
Gaza City	Negligible formal market function, increasing informal markets	Same	• Informal markets are beginning to operate in mid-April after collapsing in October 2023. Traders are selling on streets from crates, hand carts, and makeshift shelves. • Commercial goods and more humanitarian supplies have started to enter the market, and traders have been able to stock flour, vegetable, fruit, frozen meat, legumes, and spices. • Food prices in the informal markets have dropped significantly but remain higher than they were before the war. One resident of Gaza City reported in April that the price for 25 kg of flour was 18 USD, down from 530 USD, and 1 kg of tomatoes was 3.95 USD, one tenth the previous price. • Financial infrastructure is still significantly disrupted, and people cannot access their money through banks or ATMs. • Four bakeries are currently operational though fuel shortages continue to limit operations. • For the first time in six months, 404 MT of food parcels and wheat flour for 80,000 people entered northern Gaza between April 14-16 through Erez crossing. • Approximately 2800 MT of food were air dropped in northern Gaza in March and April 2024. • Humanitarian assistance entering northern Gaza has improved though restrictions continue e.g., 15 percent of aid missions were denied entry or impeded between April 1-19. • Over 70 percent of buildings are destroyed in Gaza City including a large share of shops and commercial and industrial buildings; Gaza City previously contained 46 percent of Gaza's commercial infrastructure.
Khan Younis	Severely disrupted to collapsing	Substantial deterioration	• As of April 2024, an estimated 45,000 buildings, (about 80 percent of all buildings) have been destroyed or severely damaged. By February, over 50 percent of structures had been damaged (a substantial increase from 20 percent in December) including a substantial share of shops, commercial and industrial buildings. • The formal markets remain largely collapsed with households relying primarily on the informal market. • The inability of banks to move cash has caused a severe liquidity shortage which adversely impacts the ability to purchase essential items. • Insecurity remains heightened even after the temporary withdrawal of the IDF, and people and traders are returning to try and salvage their belongings, including stocks, from looters. • Increased intensity of fighting has led to significant displacement of customers and traders further south into Rafah. • Severe damage to road infrastructure and presence of unexploded bombs is limiting transportation of market goods. • Communication services remain largely unavailable. • Informal markets are primarily supplied by resold humanitarian food assistance and looted goods and food. • Market supply is highly unstable even though some food supplies (commercial and humanitarian assistance) from Rafah are reaching this area. • High insecurity, road damage, and lack of fuel limit the movement of people and goods.
Deir al Balah	Severely disrupted	Moderate deterioration	• Six bakeries as of April 22, 2024 are operational, the highest in all the governorates. • The inability of banks to move cash has caused a severe liquidity shortage which adversely impacts the ability to purchase essential items. • In December 2023, 50 percent of sampled shops in Deir al Balah were operational; by February, partners reported some formal market activity persists. • Insecurity has increased significantly but has largely been outside Deir al Balah town, with evacuation orders concentrated in the eastern part of the governorate. • By mid-February, over 40 percent of structures had been damaged (a substantial increase from 12 percent in January), including a large share of shops and commercial and industrial buildings. • Increased intensity of fighting has led to some displacement of customers and traders further south into Rafah. • Market supply is highly unstable even though some of the food supplies (commercial and humanitarian assistance) from Rafah are reaching this area. • Due to poor communication and inability to contact wholesalers, most informal traders are restocking commodities bought from households and excess humanitarian assistance unable to reach northern Gaza.

Market Basin	Status	Change since December	Key Issues
Rafah	Severely disrupted	Substantial deterioration	• Food supply has improved considerably with increased inflows of aid and diverse commercial food items including vegetables and livestock. • In December 2023, 100 percent of sampled shops were operational in Rafah; however, this is likely to have substantially reduced since early February when air raids escalated. • At least 30 percent (and perhaps upward of 40 percent) of structures have been damaged as of mid-February compared to just 3 percent in January. • Moderate damage to shops and infrastructure, where the remaining market infrastructure is inadequate to serve the large population that has arrived in Rafah, is leading to an increase in street vendors. • The influx of people from the north has caused serious congestion and reduced mobility which is inhibiting the smooth operation of distribution channels.

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