MARKET MONITORING

WFP-HAITI|MARCH- APRIL 2025

KEY POINTS

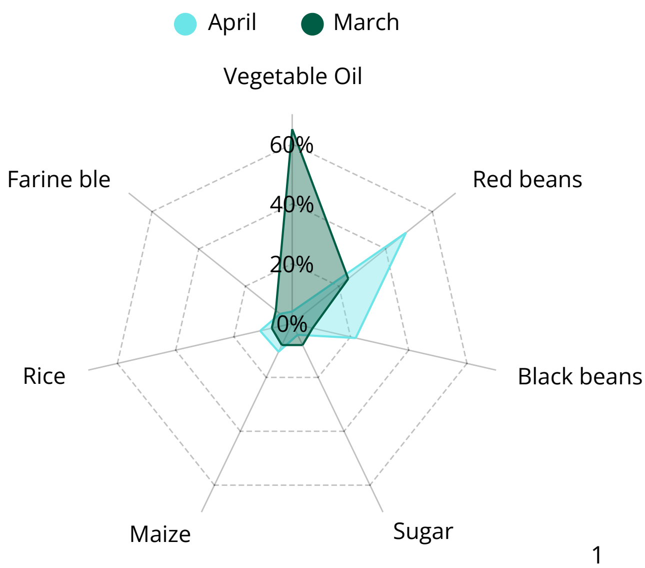
- The cost of the national food basket increased slightly by 3%, rising from HTG 25,598 for a family of five in March to HTG 26,387 in April. However, compared to April 2024, April's level represents a 10% year-on-year decrease, mainly due to improved food availability following the third corn and rice harvest.
- At the departmental level, notable monthly increases in the cost of the basket were observed in April compared to March, particularly in the departments of South (28,089 HTG, an increase of 11%) and Centre (28,199 HTG, an increase of 5%).
- In the Port-au-Prince metropolitan area, a slight decrease was recorded (-1%), with the cost of the basket falling from 26,234 gourdes in March to 25,848 gourdes in April 2025 for a family of five.
- The prices of key commodities such as wheat flour (up 13%) and vegetable oil (up 18%) rose quite sharply between March and April 2025. Most other commodities remained stable during this period.
- Food commodities are generally available, particularly corn and rice, although the availability of black and red beans remains limited.
- The national market functionality analysis, which was assessed across nine dimensions at the end of 2024, showed five good scores (product availability, assortment, accessibility, market resilience and competition) and four low scores (price volatility, product quality, services and infrastructure). The departments of Grande Anse, Sud and Ouest were identified as the most critical.

FOOD AVAILABILITY

In April, we observed good availability of food products on all markets surveyed in all departments. Retailers reported having an average of 13 days' stock, enabling them to meet household needs while awaiting new supplies.

Retailers in the Nord, Sud, and Centre departments appeared to have higher stock levels than those in other departments.

However, despite this overall availability, around 45% of retailers reported stock-outs. The main reasons reported were a lack of cash, transportation issues (mainly due to insecurity related to gang activity on certain supply routes) and high demand from certain local suppliers, which led to stock shortages.



Source: RAM Unit, Haiti

Graph1 : Proportion of retailers reporting limited availability of food products, March-April 2025

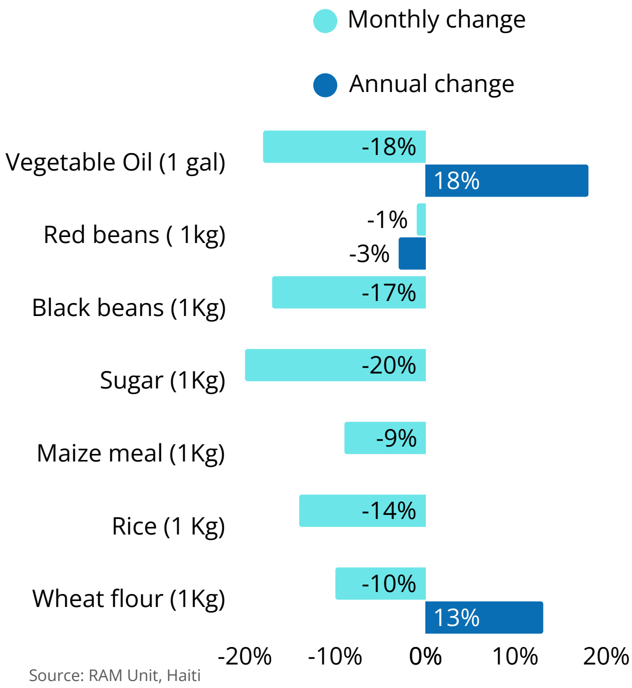
PRICE TRENDS FOR STAPLE FOODS

In April, food prices remained relatively stable for four of the seven monitored products, fell for red beans and rose for wheat flour and vegetable oil at the national level. Significant increases were observed for certain commodities at departmental level:

- Wheat flour increased by 26% in the south and by 18% in the north-east.
- Vegetable oil increased by more than 10% in the Central (18%), West (14%) and Central (11%) departments.
- Red beans increased by 20% in the Doudou department and by 17% in the Grande Anse region.

In the Central department, four of the seven monitored products experienced price increases, which could be linked to recent attacks by armed gangs in the region that disrupted commercial activities. Compared to April 2022, the value of the monitored products has declined, with the exception of wheat flour.

Graph2 : Change in food prices between March and April 2025.



Source: RAM Unit, Haiti

Table1: Food price change table by department, April 2025

Department	Wheat flour		Rice		Maize		Suagar		Black beans		Red beans		Vegetable Oil	
Centre	225	↑ 6%	298	↑ 19%	304	↓ -3%	272	↑ 13%	417	↓ -2%	563	0%	1225	↑ 11%
Artibonite	213	↑ 6%	231	0%	196	↑ 6%	207	0%	375	0%	573	↑ 2%	1200	0%
Nippes	200	0%	192	0%	207	↓ -5%	225	↑ 9%	417	0%	573	6%	1506	0%
Nord	225	↑ 13%	231	0%	196	0%	207	0%	500	↓ 0%	594	↓ -2%	1225	↓ -2%
Nord-Est	220	↑ 18%	242	↑ 2%	217	0%	241	0%	458	↓ -4%	510	↓ -16%	1200	0%
Nord-Oues	188	0%	231	0%	163	↓ -17%	207	0%	440	↑ 17%	576	↑ 2%	1100	0%
Ouest	200	↓ -6%	231	0%	283	↓ -4%	207	0%	417	0%	542	0%	1512	↑ 14%
Sud	220	↑ 26%	192	0%	217	0%	225	↑ 9%	438	↑ 5%	625	↑ 20%	1512	0%
Sud-Est	313	↑ 4%	250	↑ 8%	207	↓ -5%	254	↑ 23%	438	↓ -5%	625	↑ 7%	1512	↓ -5%
Grand'Ans	200	0%	231	0%	239	↓ -8%	207	0%	500	0%	583	↑ 17%	1701	↑ 18%

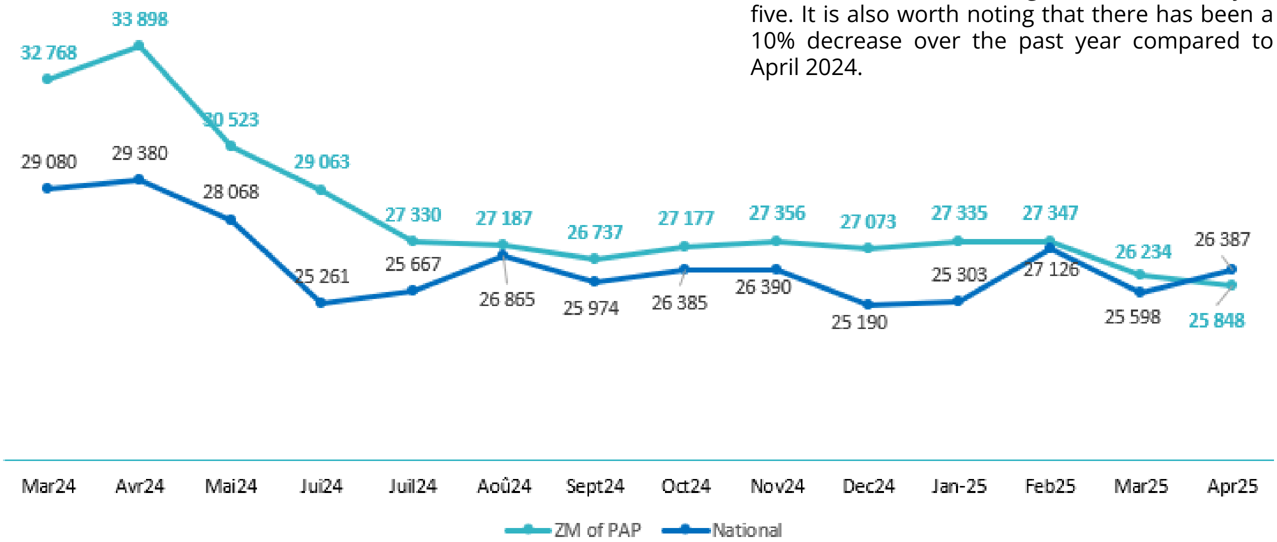
Source: RAM Unit, Haiti

↑ % Increased

↓ % decreased

TREND IN THE COST OF THE FOOD BASKET

Graph 3 : Monthly trends in the cost of the food basket, both nationwide and in the Port-au-Prince Area, Haiti

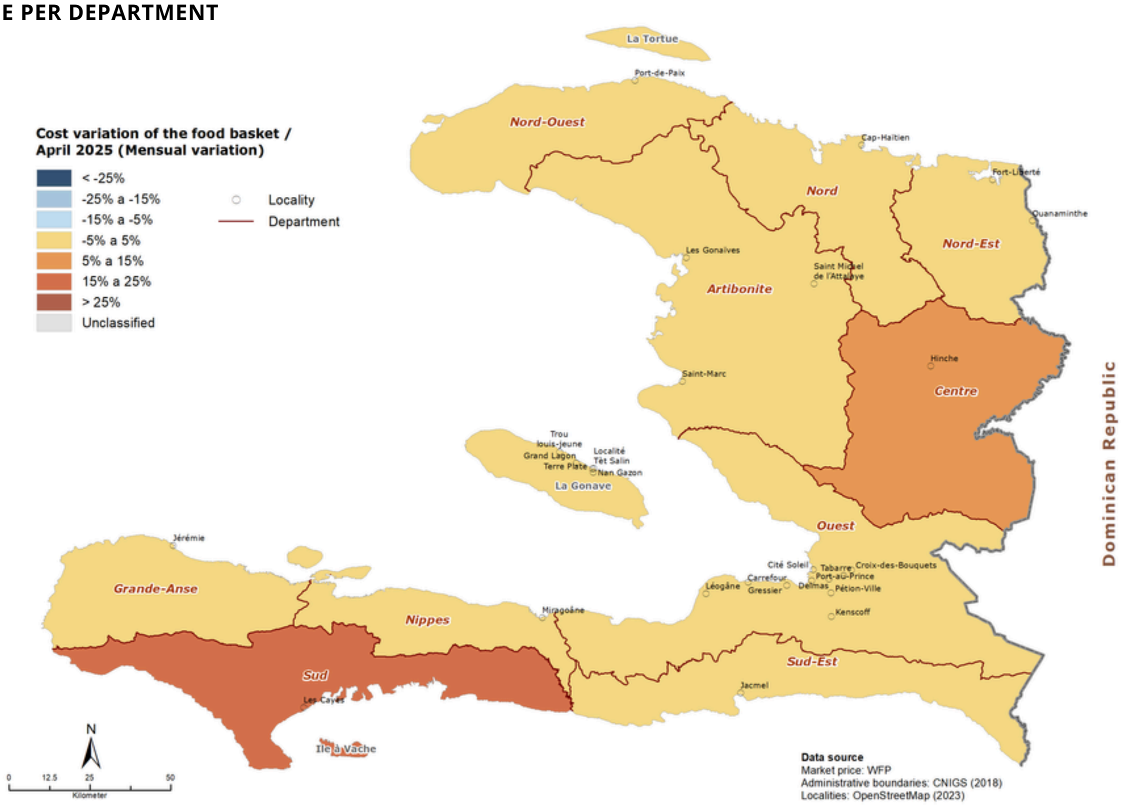


Source: RAM Unit, Haiti

In April, the national cost of the food basket was 26,387 gourdes, which is a 3% increase on March 2025 when it was 25,598 gourdes for a family of five. It is also worth noting that there has been a 10% decrease over the past year compared to April 2024.

Graph 4: Monthly change in cost of food basket, April 2025

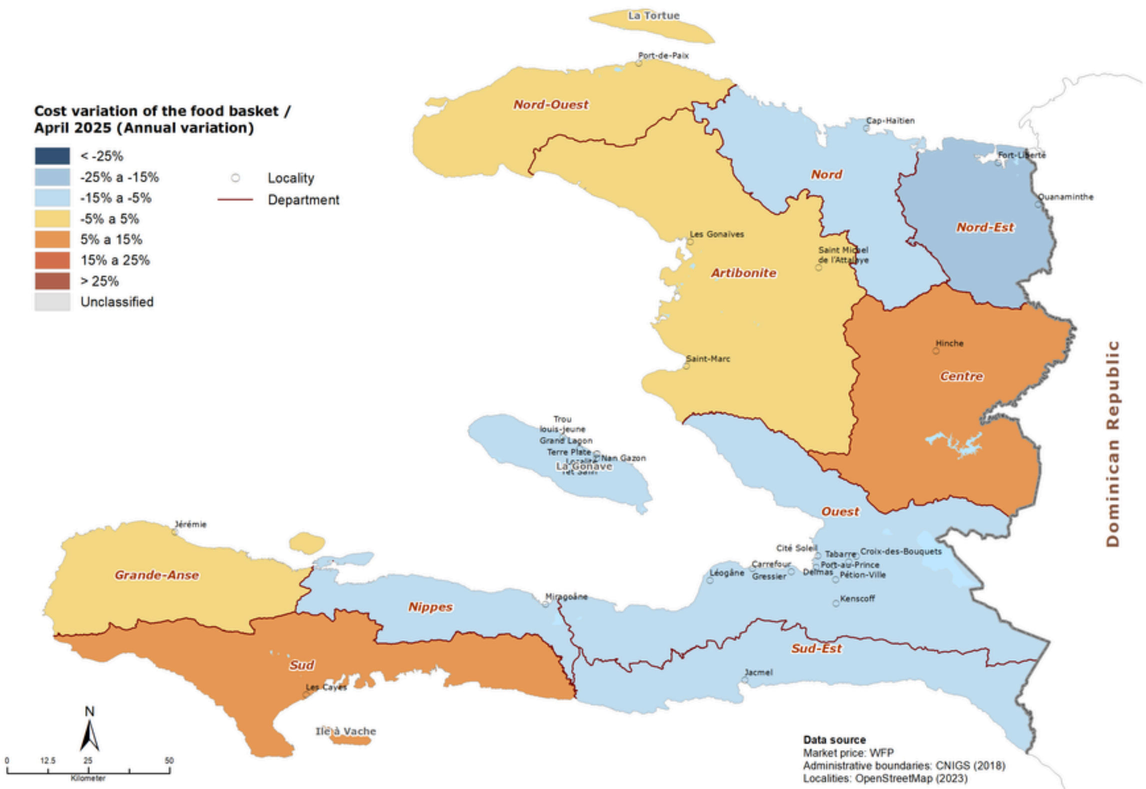
CHANGE PER DEPARTMENT



Source: RAM Unit, Haiti

At departmental level, an overall increase in food basket prices was observed in seven out of ten departments (Centre, Artibonite, North, Northwest, South, Southeast and Grand'Anse). The most significant increases were recorded in the South (15%) and the Centre (5%). In contrast, the Northeast and West departments showed stable or slightly decreased food basket costs. In the metropolitan area, the cost of the basket decreased by approximately 386 gourdes in April compared to March. Overall, however, the cost of the basket remained stable at the municipal level, with the exception of Delmas, where a 3% increase was recorded.

Graph 5 : Annual change in cost of food basket, April 2025



Source: RAM Unit, Haiti

On an annual basis, there has been a trend of decreasing costs for the basket, which was expensive in April 2024. This decline is due to prices dropping by 10–20% between April 2024 and April 2025 for five of the seven products in the basket: wheat flour, rice, corn, sugar, and black beans.
At departmental level, the cost of the basket decreased in seven departments (Nippes, North, Northeast, Northwest, West, Southeast and Grand-Anse). The largest annual decreases were observed in the Northeast (-17%), West (-13%), Southeast (-10%), and North (-9%) departments.

DESCRIPTION OF THE METHODOLOGICAL APPROACH OF MARKET MONITORING

The methodology used is the same as that of the Joint Market Monitoring Initiative (JMMI) for harmonization purposes with the system of other actors in the Cash Transfer Working Group (CWG).

- Data are collected through face-to-face interviews with five traders per product on the market. A total of 413 retailers across 69 markets are surveyed .
- Ten (10) departments are covered by the data collection, with a focus on the metropolitan area.
- A minimum of four (4) markets per department were selected based on their level of importance

Choice of commodities and measurement units
The selection of food items included in the food basket is based on the Minimum Expenditure Basket (MEB). It focuses on seven (7) staple products that make up the typical food basket of Haitian households, taking into account the energy needs of a five-person household (with a daily energy requirement of 2,100 kilocalories).

- Wheat flour (30 kg); Rice (20 kg); Ground corn (10 kg); Sugar (3 kg); Black beans (10 kg); Red beans (10 kg); Vegetable oil (1.5 gallons) .

Data collection is conducted on a monthly basis.
Data collection tools : Mobile Operational Data Acquisition (MODA) – WFP Data Collection Platform

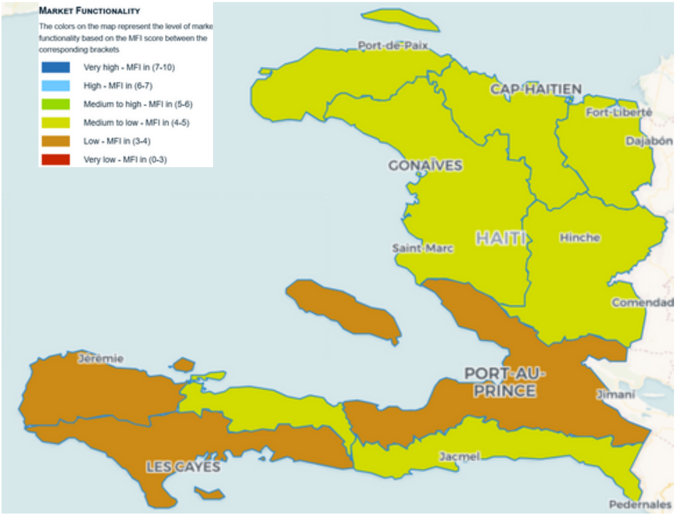
Limitations and Challenges.
The limited availability of certain traders, especially wholesalers, during periods of high demand or specific products in certain markets due to the security situation, may have hindered the ability to reach the planned sample sizes in some areas, thereby reducing the accuracy of the estimates .

MARKET FUNCTIONALITY INDEX (MFI)

During the first quarter of 2025, the WFP's RAM Unit and the Supply Chain Unit analysed and made available Market Functionality Analyses (MFAs) conducted on 64 markets and 2,391 retailers across all 10 departments in December 2025. The MFI is a multidimensional analysis that identifies areas of market dysfunction and helps to understand the challenges faced by traders. The results are essential for guiding food assistance strategies, particularly cash transfer programmes.

The February analysis revealed significant disparities in market functioning across the country, with potential implications for the distribution of food assistance, particularly in terms of assistance modalities. The departments of Grande Anse, Sud and Ouest were identified as the areas with the most critical market dysfunction. As shown in the figure below, the three most affected dimensions are infrastructure, quality, and service.

In terms of infrastructure, the analysis reveals that markets are affected by poor infrastructure (e.g. premises, warehouses, access, and sanitation facilities), a lack of maintenance, and an absence of lighting and refrigeration systems. In terms of services, markets suffer from a shortage of essential support services (transport, storage, processing and financial services), a lack of market information and an absence of quality control or certification services. In terms of product quality, the most affected markets have experienced issues such as spoiled, non-compliant, or counterfeit products, as well as storage difficulties due to a lack of quality control.



Graph 7 : Global MFI score classification by department, Dec. 24, Source: RAM Unit

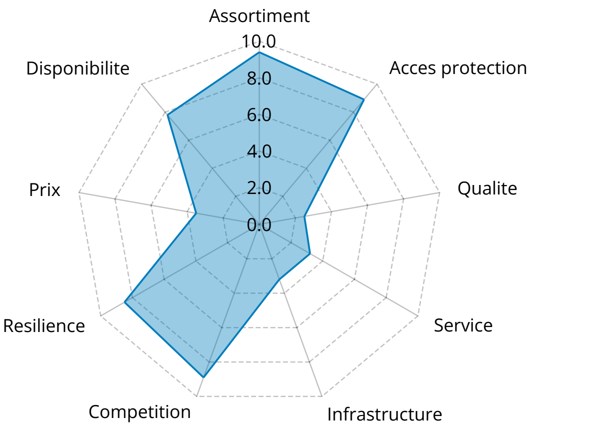
	Assortiment	Disponibilite	Price	Resilience	Competition	Infrastructure	Service	Qualite	Access Protection
Artibonite	9,8	10,0	4,5	7,9	9,2	5,7	2,9	3,7	6,7
Centre	9,9	7,0	4,6	8,5	10,0	4,6	2,7	2,2	7,7
Grande'Anse	9,2	4,9	0,6	8,5	9,3	2,1	4,9	2,3	9,5
Nippes	9,7	9,5	4,8	7,7	9,7	3,5	3,3	2,1	10,0
North	9,4	7,7	6,3	7,2	4,8	5,4	3,8	2,3	8,8
North-East	9,7	5,7	5,6	8,9	9,4	4,0	3,6	3,9	9,6
North-West	9,9	6,4	3,7	9,0	9,6	5,7	4,0	3,3	9,0
South	10,0	9,8	4,6	7,7	9,8	1,8	3,3	1,0	8,2
South-East	9,0	7,6	5,5	9,1	9,6	3,0	3,6	3,4	9,5
West	9,7	7,3	4,1	8,7	8,7	2,4	1,4	1,7	9,4

Table 2 : Scores by MFI dimension and department, Dec. 24, Source: RAM Unit

LThe Market Functionality Index is a standardised methodology for assessing WFP markets. It aims to quantify the functionality of each market using a score, while also identifying weaknesses and areas requiring intervention to ensure the continuity and effectiveness of assistance.

SURVEY: This methodology is based on a standard survey with questions organised into nine essential dimensions for assessing market functionality. These are: assortment; Availability; price;supply chain resilience; Competition; Infrastructure; Service; Food quality; Access and protection.

LE SCORING: Markets are therefore rated on a scale of 0 to 10 to allow for global comparability. Full market functionality (IFM = 10) refers to a market that is fully developed and efficient. In most contexts where the WFP operates, we do not expect such scores to be achieved.



Graph 6: Score by dimension (out of 10), Haiti, Dec. 2024, Source: RAM Unit

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