إتحاد الغـــرف التجاريـــة الصناعيـــة الزراعيـــة الفلسطينيـــة

Federation of Palestinian Chambers of Commerce, Industry & Agriculture

Gaza Movement of Goods Weekly Report

Week 50: 08-14 July, 2025.

According to reports from the Palestinian Ministry of Health, the total number of deaths due to famine in the Gaza Strip has reached **147** as of Wednesday, July 30, 2025, including **88 children**, a grave indicator of the worsening humanitarian catastrophe caused by the ongoing blockade and war. This toll comes amid a rapid deterioration in living conditions, a severe decline in the availability of food, fuel, and basic services, and the inability of relief mechanisms to meet even the minimum humanitarian needs.

In this Report:

- 119 trucks entered Gaza during the reporting week, 51% (61 trucks) were looted before reaching their destinations. Only 58 trucks were delivered successfully.
- Humanitarian trucks made up the vast majority of the shipments (109 trucks), while only 10 trucks carried commercial goods, and, as usual, labeled as humanitarian aid.
- The aid was heavily focused on direct consumption, especially food parcels and flour.
- Comparing to the pre-war prices, the average increase across all food items is 3,242%, a clear sign of hyperinflation and escalating hardship for families reliant on staple foods.
- Non-food item prices surged: baby diapers (1,375%), firewood (1,333%), soap (1,337%).
- During the first half of July, there was a noticeable decline in (GCPI), the index value fell from 2,825% to 2,691%.
- Between July 1 and July 14, 2025, daily commission rates exhibited persistent elevation and controlled variability across the cash market. Notably, the rate held at 45% for five consecutive days.
- No coordination system exists for commercial or private sector imports. As a result, Gaza's market continues to collapse, with major supply and demand distortion.

July 30, 2025

Gaza Movement of Goods Weekly Report

1. Executive Summary:

- This report, of weekly market analysis in Gaza Strip, covers **week 50 (July 08 – 14, 2025),** a period marked by continued war on Gaza and a deepening humanitarian crisis.
- Between 08 and 14 July 2025, the Israeli military campaign in Gaza escalated sharply, ushering in **a new wave of mass forcibly displacement** and further **constricting humanitarian space**.
- **119 trucks** entered Gaza during the reporting week, **51% (61 trucks)** were looted before reaching their destinations. Only **58 trucks were delivered successfully**.
- **Humanitarian trucks** made up the vast majority of the shipments (**109 trucks**), while only 10 trucks carried commercial goods, and, as usual, labeled as humanitarian aid and required the payment of **exorbitant fees**.
- **Erez Crossing** recorded the highest activity, with **85 trucks** entering over three days, Karm Abu Salem (**KAS**) Crossing showed **24 humanitarian trucks** entering, and **Route 96** Gate saw the entry of **10 trucks** only.
- This week's trucks cargo was heavily skewed toward **food parcels** (50 trucks, ~42%) and **flour** (45 trucks, ~38%), with limited provision of **general food items** (10 trucks, ~8%), **medical supplies** (11 trucks, ~9%), and critically low **fuel** shipments (3 trucks, <3%).
- The aid was heavily focused on **direct consumption**, especially **food parcels** and **flour**, highlighting a purely humanitarian relief approach, with little effort to enhance **self-reliance** or **support critical economic sectors**.
- Comparing to the pre-war prices, the **average increase** across all food items is **3,242%**, a clear sign of **hyperinflation** and escalating hardship for families reliant on staple foods.
- Non-food item prices surged: **baby diapers (1,375%)**, **firewood (1,333%)**, **soap (1,337%)**.
- During the first half of July, there was a **noticeable decline in the value of the basket**, dropping from about 2,611 **ILS in June** to about **2,488 ILS**. Consequently, the index value fell from **2,825% to 2,691%.**
- **Between July 1 and July 14, 2025**, daily cash-out commission rates exhibited persistent elevation and controlled variability across the cash market. Notably, **the rate of held at 45% for five consecutive days**, meaning that, people lose nearly half their cash when accessing remittances or aid transfers.
- **No coordination system exists** for commercial or private sector imports. As a result, Gaza's **market continues to collapse**, with major supply and demand distortion.
- Access to health services continues to deteriorate; multiple facilities were evacuated or shut.
- Without intervention to restore crossings, stabilize markets, and regulate inflation, conditions will continue to deteriorate rapidly.

2. Distribution of the Population in the Gaza Strip:

Between 08 and 14 July 2025, the Israeli military campaign in Gaza escalated sharply, ushering in a new wave of mass forcibly displacement and further constricting humanitarian space. Following the breakdown of the March ceasefire, Israeli ground and aerial operations intensified, accompanied by sweeping evacuation orders that dramatically altered the demographic landscape of the Strip. On 1 July, residents across northern Gaza Strip—including Gaza City and surrounding areas—were ordered to evacuate southward toward designated "humanitarian zones." By 7 July, these directives expanded into central Gaza, targeting additional neighborhoods and forcing civilians westward toward coastal zones. These evacuation mandates triggered secondary and tertiary displacements, uprooting thousands from areas they had only recently returned to. As Gaza's habitable zones rapidly contracted, over 82% of the territory was designated as either an evacuation or No-Go area by early July—leaving scant shelter options. Random camps in West of Gaza, Deir al-Balah and Al-Mawasi swelled beyond capacity, lacking essential infrastructure, protection, and sanitation. The relentless reconfiguration of displacement routes severely undermined humanitarian access and destabilized the fragile fabric of civilian life. Simultaneously, Israeli forces enforced the militarized Morag Corridor—an east-west axis stretching between Khan Younis and Rafah. This corridor, cleared through systematic demolitions and military operations, led to the near-total depopulation of Rafah. With safe areas disappearing and displacement reaching historic levels, Gaza's civilians faced a grim reality: an ongoing cycle of forced movement, insecurity, and escalating vulnerability.

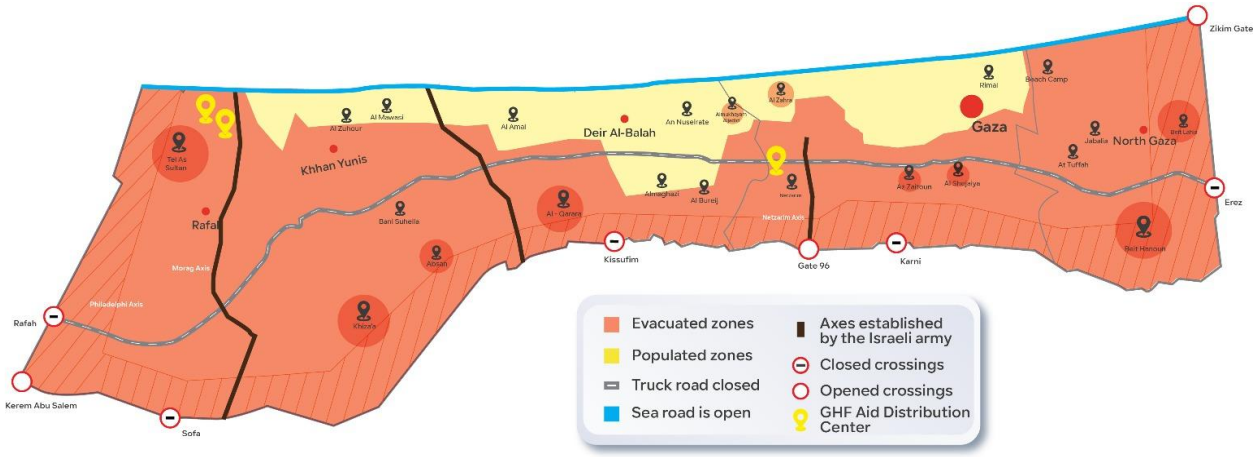

Figure (1): Populated and Evacuated Areas, and the Status of Crossings and Roads in Gaza Strip.

3. Daily Crossing Points Status:

3.1. Number of Trucks:

The movement of trucks entering the Gaza Strip during the week of **July 8 to 14, 2025**, showed **significant fluctuations**, both quantitatively and qualitatively. **A total of 119 trucks** were recorded during this period, of which **only 58** successfully reached their destinations, while 61 were looted, representing over 51% of the total. Humanitarian trucks made up the vast majority of the shipments (109 trucks), while only 10 trucks carried commercial goods. These commercial trucks entered via Route 96 on the last day of the week and, as usual, were not coordinated officially under the name of the private sector, but rather labeled as humanitarian aid and required the payment of **exorbitant fees**, reflecting the continued ban on commercial activity and the limited flow of goods into Gaza Strip.

In terms of entry points, **Erez Crossing** recorded the highest activity, with **85 trucks** entering over three days; however, **55 of them were looted**, underscoring the persistent security challenges along the entry routes. In contrast, Karm Abu Salem (**KAS**) Crossing showed better performance, with **24 humanitarian trucks** entering on Tuesday, July 8, all of which were delivered successfully with no looting reported. **Route 96** saw the entry of **10 trucks** on Monday, July 14, carrying **commercial goods**; 9 were delivered, while one truck was looted. Notably, no trucks entered on Wednesday and Sunday (July 9 and 13), indicating a **partial disruption in the supply chain** and raising concerns about the continuity of aid flows. Additionally, Friday and Saturday marked the **peak of looting incidents**, with 60 trucks looted within just 48 hours, highlighting further deterioration in the security environment and the inability to protect humanitarian convoys.

These indicators reflect a clear **dysfunction in the regularity of aid deliveries** and a stark disparity in the performance of entry points. This calls for **urgent intervention to strengthen protection mechanisms** and ensure the safe and consistent flow of trucks, especially amid the ongoing humanitarian crisis and the growing reliance on humanitarian assistance.

Table (1): Number of trucks and looted trucks for each day.

#	Day	Date	Crossing	Type of Commodities	Number of Entered Trucks		
					Looted	Delivered	Total
1	Tuesday	08/07/2025	KAS	Humanitarian	0	24	**24**
2	Wednesday	09/07/2025	-	-	0	0	**0**
3	Thursday	10/07/2025	Erez	Humanitarian	0	15	**15**
4	Friday	11/07/2025	Erez	Humanitarian	30	10	**40**
5	Saturday	12/07/2025	Erez	Humanitarian	30	0	**30**
6	Sunday	13/07/2025	-	-	0	0	**0**
7	Monday	14/07/2025	Route 96	Commercial	1	9	**10**
Total					**61**	**58**	**119**

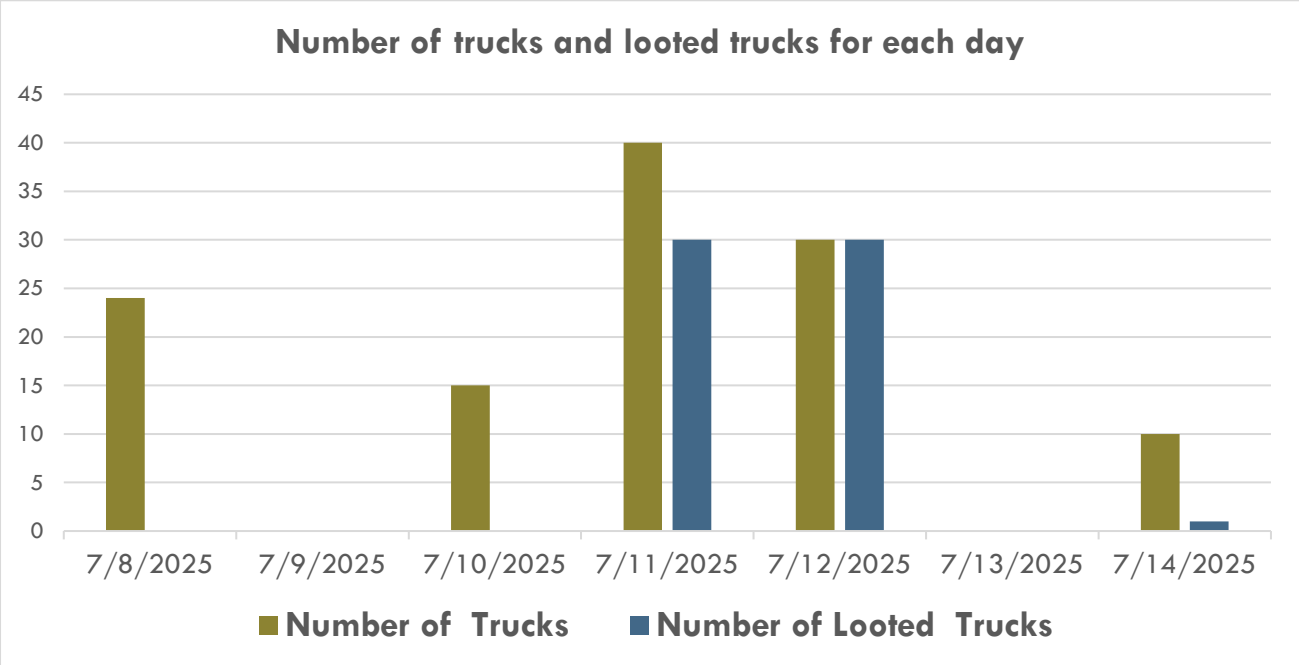

Figure (2): Number of trucks and looted trucks for each day.

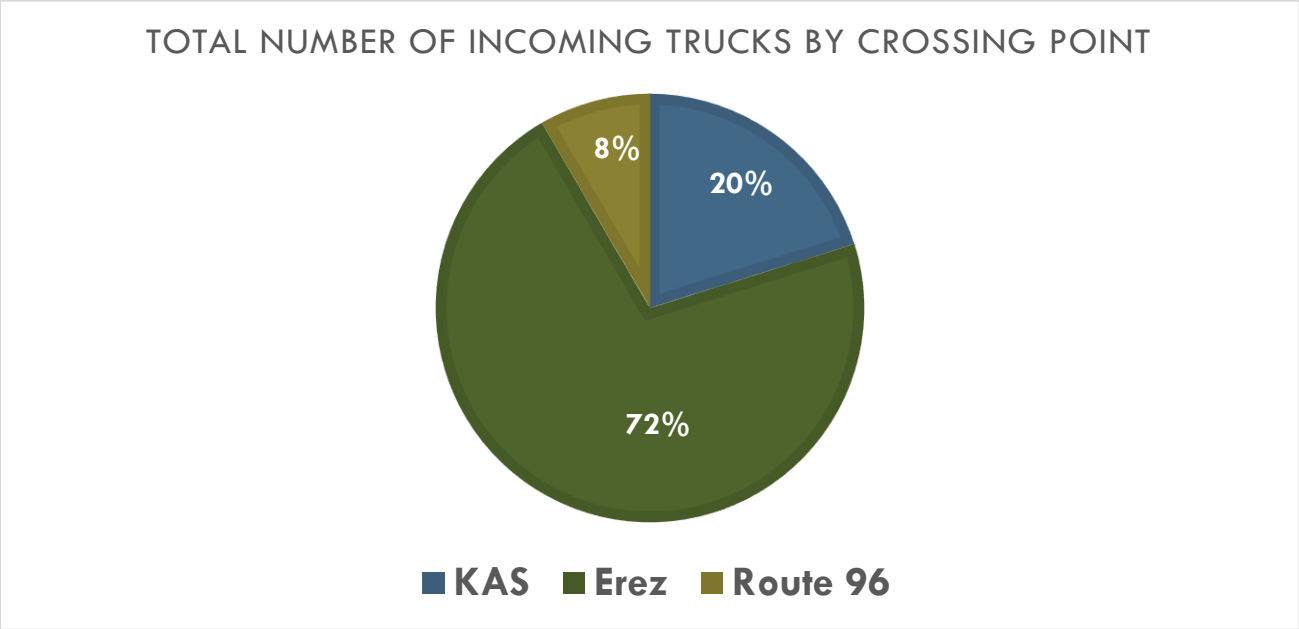

Figure (3): Total Number of Incoming Trucks by Crossing Point.

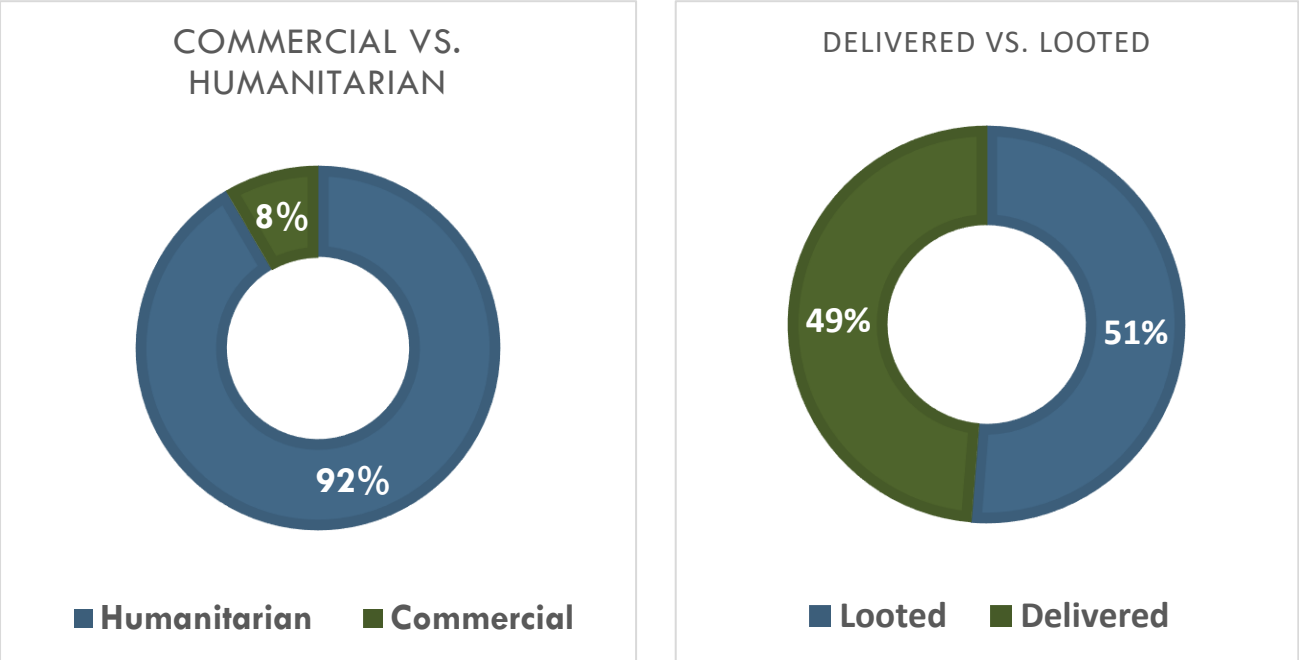

Figure (4): Commercial Vs. Humanitarian trucks and Delivered Vs. Looted trucks.

3.2. Types Of Commodities:

This week, the cargo of incoming trucks included food, medical supplies, and fuel, with a notable dominance of humanitarian aid, reflecting the continued absence of actual commercial activity.

3.2.1. Quantitative Analysis

- **Food parcels** ranked first in quantity, with a total of 50 trucks (accounting for about 42% of all incoming trucks). This indicates a heavy focus on distributing ready-to-consume aid rather than supporting local markets or production supply chains.

- **Flour** came second with 45 trucks (less than 38% of the total). It is worth noting that some trucks may have carried both parcels and flour, reflecting an effort to address the critical need for bread as a staple.
- **General food items** (not categorized as parcels) accounted for only 10 trucks (about 8%), a marginal share that suggests a lack of dietary diversity in the aid and a reliance on limited, low-nutrient items.
- **Medical supplies** reached 11 trucks (about 9% of the total), which remains modest considering the catastrophic state of the health sector.
- **Fuel** recorded the lowest share, with just 3 trucks (less than 3%), falling short of meeting the minimum requirements for running hospitals, desalination plants, or bakeries.

3.2.2. Qualitative Analysis

- The aid was heavily focused on direct consumption, especially food parcels and flour, highlighting a purely humanitarian relief approach, with little effort to enhance self-reliance or support critical economic sectors.
- The limited quantities of fuel and medical supplies are disproportionate to the growing needs, particularly as all vital facilities rely entirely on generators amidst the collapse of the public infrastructure.
- The absence of non-food items, such as hygiene kits, water, or shelter materials, points to a gap in the diversity of aid provided or a misjudgment of comprehensive needs.
- The clear lack of productive inputs (e.g., seeds, animal feed, or maintenance equipment) reinforces the consumptive nature of the aid and prolongs dependency, undermining any potential for recovery or resilience.

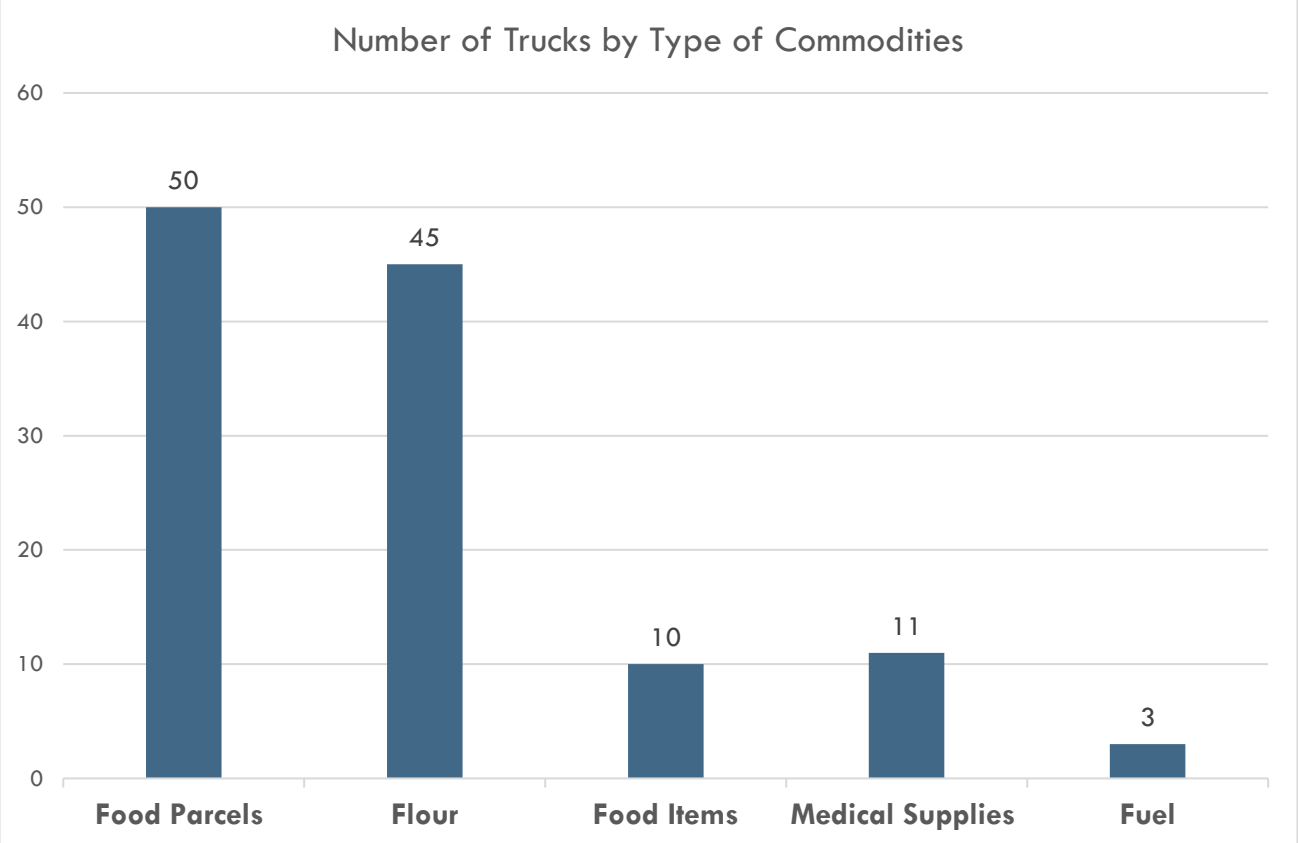

Figure (5): Number of Trucks by Type of Commodities

4. Market Prices for Basic Goods:

Despite the resumption of humanitarian aid deliveries on 20 May 2025, the prices of essential goods—including both food and non-food items—remain at historically high levels. This sustained inflation is driven by two primary factors:

- **Severely limited supply**: Aid volumes entering Gaza remain vastly insufficient to meet the needs of nearly two million residents.
- **Widespread diversion**: Looting of humanitarian shipments continues to obstruct last-mile delivery, complicating access for the most vulnerable.

This section presents a systematic analysis of market price trends during the reporting period. It compares **Current prices vs. pre-war benchmarks** and **Current prices vs. last week's figures**. By contrasting short-term fluctuations with long-term trajectories, the analysis highlights emerging patterns in affordability and access—critical indicators for both operational planning and advocacy.

4.1. Food Items:

Food availability in Gaza's markets has deteriorated sharply, with many essential items now entirely depleted. The remaining goods fall into two main categories:

- **Imported Staples:** Basic commodities including flour, sugar, rice, vegetable oil, macaroni, and kidney beans—typically brought in through border crossings—are now in critically short supply. Prices have skyrocketed, exceeding 45 times their pre-war levels, due to the ongoing blockade and rapid depletion of available stock.
- **Locally Grown Produce:** Vegetables such as tomato, cucumber, potato, eggplant, onion, and pepper are still available but in very limited quantities. Estimates indicate that current production of these crops amounts to only about 8% of pre-war levels. Agricultural production remains severely constrained as a result of the widespread destruction of farmland through bulldozing, shelling, and forced evacuations, compounded by the extreme scarcity and high cost of production inputs.

This report monitors the availability and pricing of 13 key food items, comparing current figures to pre-war levels, last week's prices, and the February 2025 averages—the latter representing the highest volume of goods recorded during the ceasefire period. These comparisons underscore the escalating scarcity and instability of food access as the crisis deepens.

4.1.1. Current Week Vs. Pre-war Prices

A comparative analysis of average food prices this week against pre-war levels reveals **exceptionally high inflation across all essential goods**, threatening food security and household resilience.

- **All items monitored** have registered dramatic price hikes, ranging from **184% (Kidney beans)** to a staggering **14,757% (onion)**.
- **Onion** is now priced over **149×** its pre-war value, followed by **sugar (95×)** and **Flour (40×)**.
- **cucumber, Tomato, lemon, Potato, and macaroni** have risen **15–30×**.
- **Eggplant, oil, rice, pepper, and kidney beans** show slightly lower, yet still extreme, inflation rates, reaching **3–14×** pre-war prices, underscoring deep supply chain disruption.
- The **average increase** across all items is **3,242%**, a clear sign of **hyperinflation** and escalating hardship for families reliant on staple foods.

Price volatility in Gaza has reached extreme levels, with a **standard deviation of 4,211%**, underscoring severe market unpredictability. This instability stems from persistent **border blockages**, **import restrictions**, and widespread **logistical disruptions**, all of which compromise supply continuity and price regulation.

Disappearance of Essential Goods

Multiple vital food items—**chicken, frozen meat, eggs, garlic, dairy, and fruit**—have disappeared entirely from local markets. The scarcity is driven by:

- Prolonged **bans on private sector imports**
- **Destruction of agricultural assets** across key production zones
- **Rapid depletion of stock** under repeated demand shocks with no replenishment capacity

This combination of market failure and systemic disruption has triggered a deepening crisis in food security. Here, inflation isn't just a symptom—it's actively fueling household hardship and eroding economic resilience.

Verified Market Transformation

A formal statistical analysis compared current food prices against pre-war benchmarks:

- **Shapiro-Wilk Test** rejected the assumption of data normality *(p = 0.000)*
- The **Wilcoxon Signed-Rank Test** confirmed a significant price shift *(Z = -3.180, p = 0.001)*
- With a notably high **effect size of r = 0.88**, findings reflect a **structural market transformation**, not minor fluctuation

Table (2): comparing current prices of basic food items with pre-war prices.

#	Item	Unit	Price Average		% Of change
			Pre-war	Current Week	
1	Onion	Kg	2.00	297.14	14,757%
2	Sugar	Kg	3.00	284.29	9,376%
3	Flour	Sack (25Kg)	35.00	1389.29	3,869%
4	Cucumber	Kg	2.00	58.86	2,843%
5	Tomato	Kg	2.00	58.57	2,829%
6	Lemon	Kg	4.00	88.57	2,114%
7	Potato	Kg	2.00	36.00	1,700%
8	Macaroni	Kg	2.50	44.29	1,671%
9	Eggplant	Kg	2.00	28.14	1,307%
10	Rice	Kg	8.00	64.29	704%
11	Oil	Liter	9.00	53.14	490%
12	Pepper	Kg	10.00	40.57	306%
13	Kidney beans	Kg	7.00	19.86	184%
14	Frozen chicken	Kg	8.00	NA	NA
15	Garlic	Kg	2.50	NA	NA
16	Apple	Kg	5.00	NA	NA
17	Banana	Kg	2.50	NA	NA
18	Orange	Kg	4.00	NA	NA

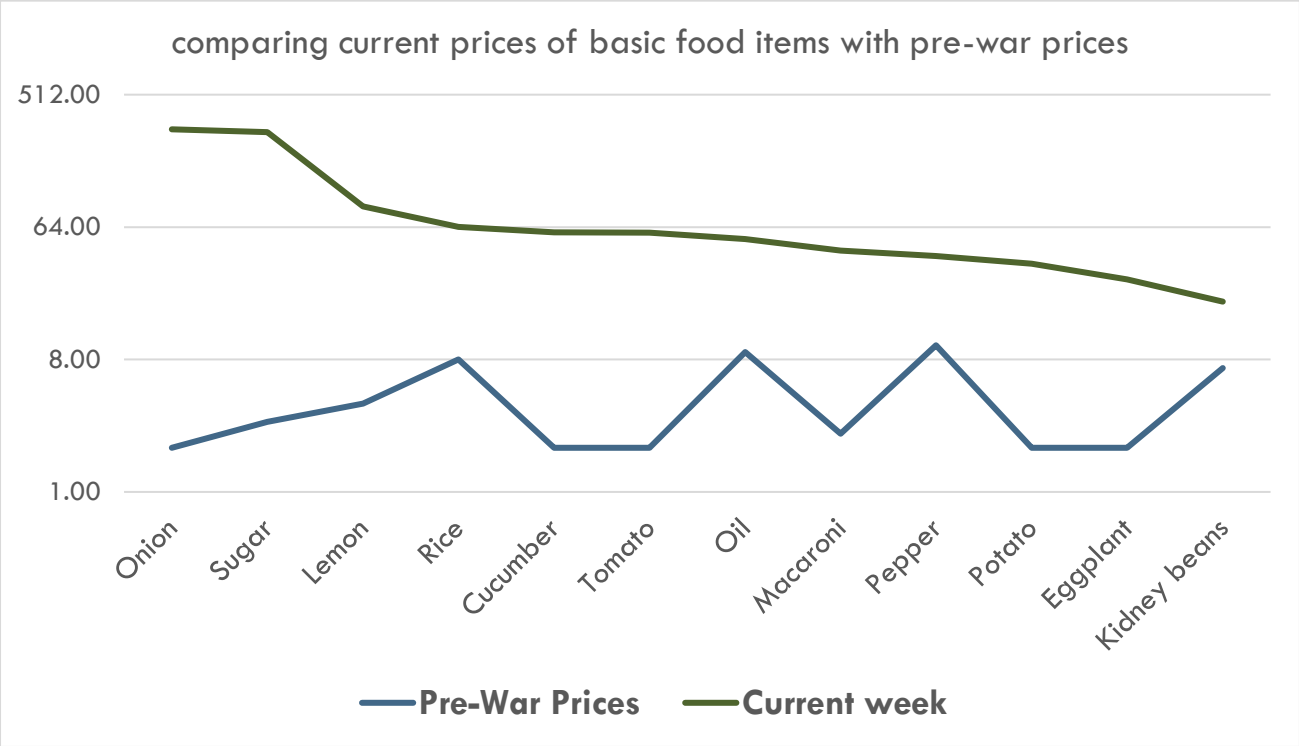

Figure (6): comparing current prices of basic food items with pre-war prices.

4.1.2. Current Week Vs. Previous week and Feb-2025 Prices:

A week-on-week and long-term comparison of average prices for basic food items reveals significant developments in Gaza's food market.

Change Since February 2025

All 13 tracked food items are now priced higher than they were in February 2025, with inflation rates varying drastically:

- **Pepper** rose by **116%**
- **Sugar** surged by an unprecedented **5,907%**

Week-to-Week Movements

- **10 out of 13 items** showed additional price increases compared to the previous week:
  - Increases ranged from **1% (Sugar)** to **86% (Onion)**
- **3 items** saw price declines:
  - Drops ranged from **5% (Tomato)** to **13% (Kidney beans)**

Notable Weekly Fluctuations

- **Onions** rose by **86%**, driven by acute supply disruptions.
- **Kidney beans** declined by **13%**, a likely reflection of reduced consumer purchasing power and shifting demand behavior.

Correlation & Statistical Analysis

Long-Term Inflation Patterns

- **Normality assumption** failed for both current prices and cumulative percentage changes since February *(Shapiro-Wilk test, $p = 0.003$)*.
- A **strong positive correlation** was observed *(Spearman's $r = 0.879$, $p = 0.000$)*, confirming that items with steep wartime inflation remain elevated—suggesting entrenched market distortion.

Week-on-Week Price Shift

- Weekly data also violated normality *(Shapiro-Wilk, $p = 0.000$)*; thus, the **Wilcoxon Signed-Rank Test** was applied.

- Findings revealed a **statistically significant change** in prices compared to the previous week *(Z = -2.377, p = 0.017)*.
- The **effect size** of **r = 0.66** indicates a substantial market shift with practical consequences for household spending and purchasing behavior.

February vs. Current Week Comparison

- A clear price divergence was confirmed *(Z = -3.180, p = 0.001)*.
- The **high effect size** *(r = 0.88)* reflects a deep and lasting market transformation, reinforcing concerns about affordability and long-term economic strain.

Table (3): Comparing current prices of basic food items with previous week and Feb-2025 prices.

#	Item	Unit	Current Week Prices	Comparing Current Week to Previous Week		Comparing Current Week to Feb-2025	
				Prices	% Of Change	Prices	% Of Change
1	Onion	Kg	297.14	160.00	86%	4.95	5,907%
2	Flour	Sack (25Kg)	1389.29	935.71	48%	30.20	4,500%
3	Sugar	Kg	284.29	281.43	1%	6.23	4,462%
4	Lemon	Kg	88.57	82.86	7%	6.82	1,198%
5	Tomato	Kg	58.57	61.43	-5%	6.43	811%
6	Macaroni	Kg	44.29	28.43	56%	5.00	786%
7	Rice	Kg	64.29	41.43	55%	7.36	774%
8	Cucumber	Kg	58.86	52.86	11%	8.45	597%
9	Potato	Kg	36.00	40.43	-11%	5.32	577%
10	Oil	Liter	53.14	32.57	63%	9.16	480%
11	Kidney beans	Kg	19.86	22.86	-13%	5.00	297%
12	Eggplant	Kg	28.14	23.57	19%	7.89	257%
13	Pepper	Kg	40.57	39.43	3%	18.75	116%

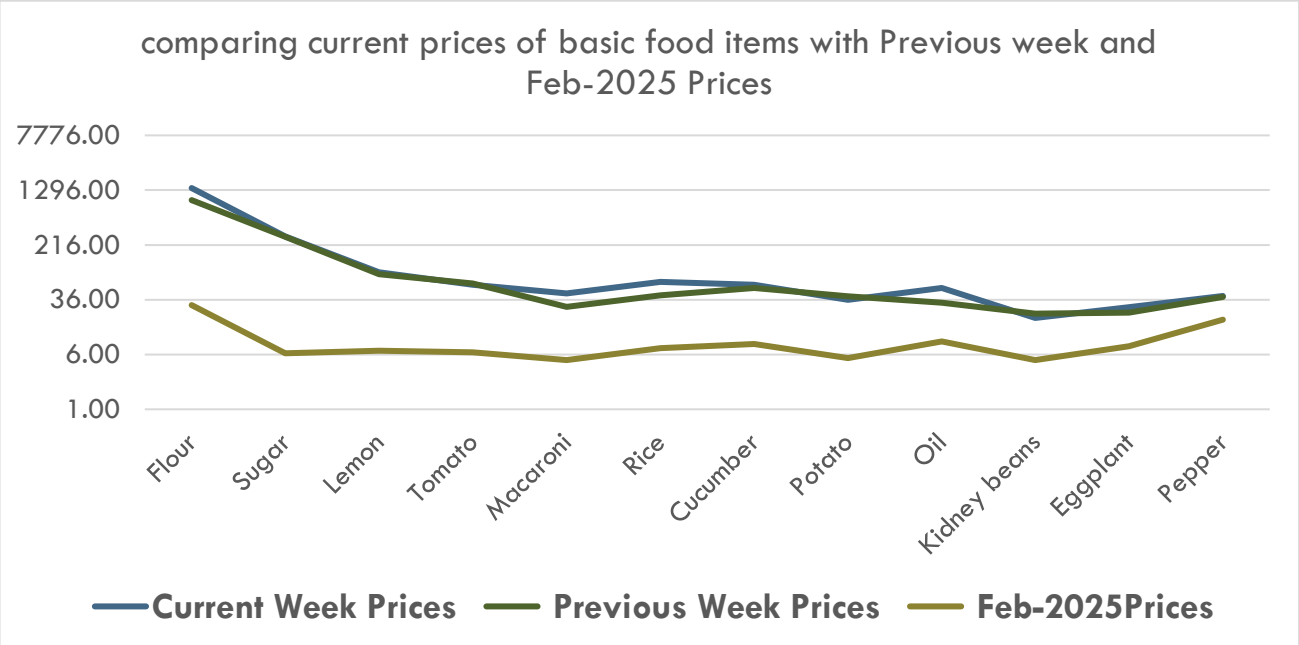

Figure (7): Comparing current prices of basic food items with previous week and Feb-2025 prices.

4.2. Non-Food Items:

This section examines the prices of 6 essential non-food items that are currently in high demand. Five of these items are hygiene products—**soap, dishwashing liquid, laundry detergent, baby diapers, and sanitary towels**—while the sixth is **firewood**, which has become a primary substitute for cooking gas. The analysis compares **current prices** with both **pre-war levels** and **prices from the previous week**, highlighting the impact of supply shortages and market instability on these critical goods.

4.2.1. Current Week Vs. Pre-war Prices

An analysis of average prices for six essential non-food items reveals a sharp and widespread increase compared to pre-war levels, underscoring severe market disruption and mounting household strain.

Price Escalations Across All Items

All six tracked items have experienced significant inflation:

- **Sanitary towels** increased by **195%** — the lowest among all items
- **Firewood** saw a **1,300%** rise, driven by acute cooking gas shortages due to border closures
- **Dishwashing liquid** soared to **15×** its original price, largely due to heightened demand
- **Baby diapers** and **firewood** both surged **14×**
- **Soap** and **laundry detergent** climbed nearly **12× and 7x respectively.**

Statistical Confirmation of Price Transformation

To determine the scale and relevance of recent price changes, a formal comparison was conducted between current figures and pre-war baselines:

- **Normality assumption was rejected** *(Shapiro-Wilk test, p = 0.003)*, necessitating non-parametric testing.
- The **Wilcoxon Signed-Rank Test** revealed a **statistically significant difference** *(Z = -2.201, p = 0.028)*.
- The **effect size of r = 0.9** reflects a **major and impactful market shift**, underscoring that these changes are not random fluctuations but sustained inflationary pressure with direct livelihood consequences.

Implications for Household Well-Being

The steep cost increases are driven by multiple interlocking factors:

- **Critical supply shortages**
- **Disruption of supply chains and local distribution networks**
- **Restrictive import controls and fuel scarcity**

These combined pressures are severely limiting household access to **basic hygiene essentials** and **fuel alternatives**, intensifying Gaza's humanitarian crisis and deepening the vulnerability of affected communities.

Table (4): Comparing current prices of basic non-food items with pre-war prices.

#	Item	Unit	Pre-war Prices	Price Average (current week)	% Of (current week Vs. Pre-war prices)
1	Dishwashing liquid	Liter	6	90.00	1400%
2	firewood	Kg	0.5	7.00	1300%
3	Baby diapers	Pack (40 pcs)	29.0	400.00	1279%
4	Soap	Piece	2.5	18.57	643%
5	laundry detergent	Kg	8.0	55.00	588%
6	sanitary towels	Pack (10 pcs)	6.0	18.00	200%

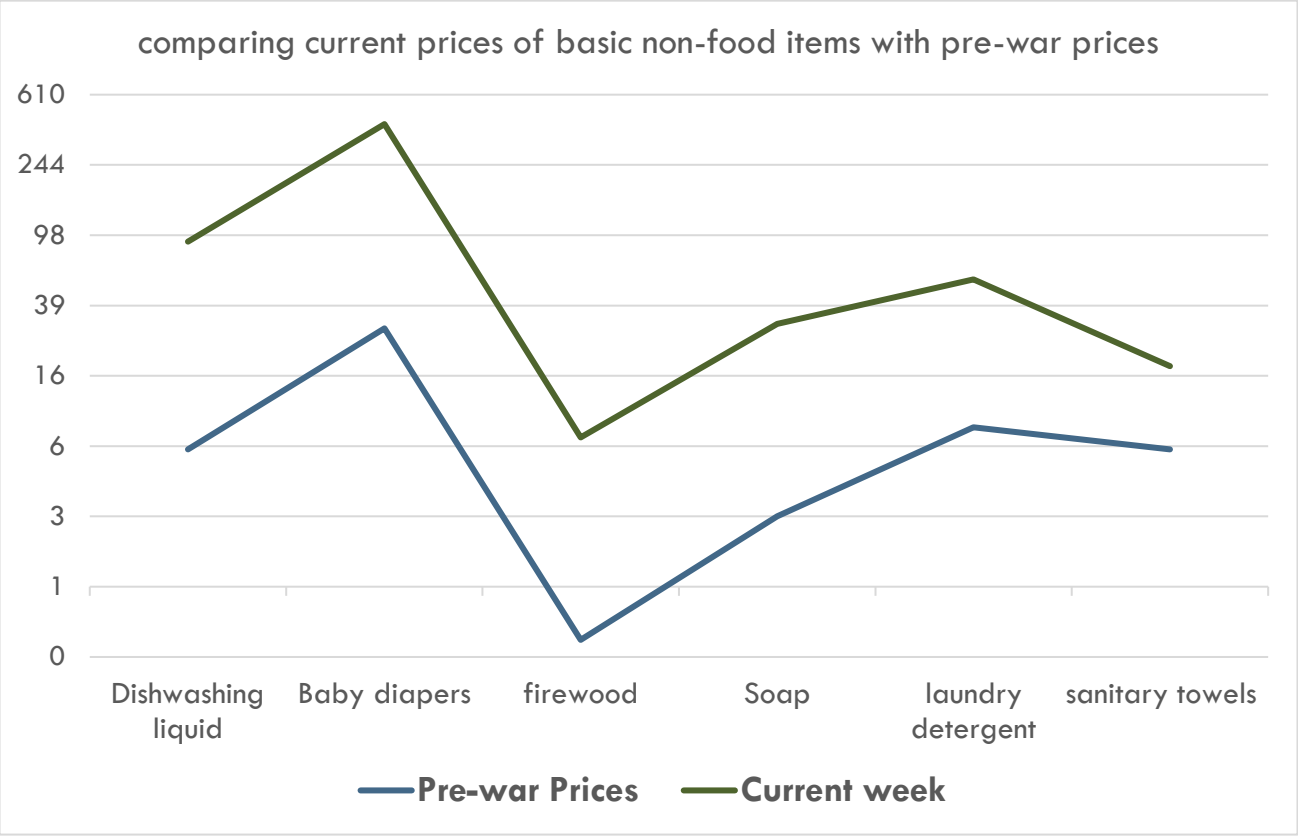

Figure (8): Comparing current prices of basic non-food items with pre-war prices.

4.2.2. Current Week Vs. Previous Week:

A comparative review of this week's average prices for six essential non-food items reveals **modest yet notable market fluctuations** compared to the previous week.

Price Changes Observed:

- **3 out of 6 items** experienced price increases:
  - **Soap**: ↑ **54%**
  - **Baby diapers**: ↑ **9%**
  - **sanitary towels**: ↑ 1**%**
- **Dishwashing liquid, laundry detergent and firewood**: Prices remained **unchanged**.

Statistical Review

A formal comparison of current hygiene product prices against previous periods was conducted to evaluate the significance of observed changes:

- **Normality assumption** was not met *(Shapiro-Wilk test, p = 0.003)*, prompting the use of the **Wilcoxon Signed-Rank Test**.
- The test did **not yield a statistically significant result** *(Z = -1.604, p = 0.109)*, indicating no clear statistical change between the two time points.

Market Implications and Practical Impact

While the statistical threshold was not crossed, continued price increases signal **ongoing market instability**. Supply chain disruptions, including limited import capacity and fuel scarcity, are:

- Undermining **affordability of essential hygiene items**
- Gradually eroding **household purchasing power**
- Exacerbating the strain on families already facing compounding humanitarian challenges

This reflects a persistent economic stressor with **real-world consequences**, even if not captured as statistically significant within this reporting window.

Table (5): Comparing current prices of basic non-food items with the previous week prices.

#	Item	Unit	Price Average (previous week)	Price Average (current week)	% Of (current week vs. previous week)
1	Soap	Piece	20.00	30.71	54%
2	Baby diapers	Pack (40 pcs)	382.86	415.71	9%
3	sanitary towels	Pack (10 pcs)	17.57	17.71	1%
4	Dishwashing liquid	Liter	90.00	90.00	0%
5	laundry detergent	Kg	55.00	55.00	0%
6	firewood	Kg	7.00	7.00	0%

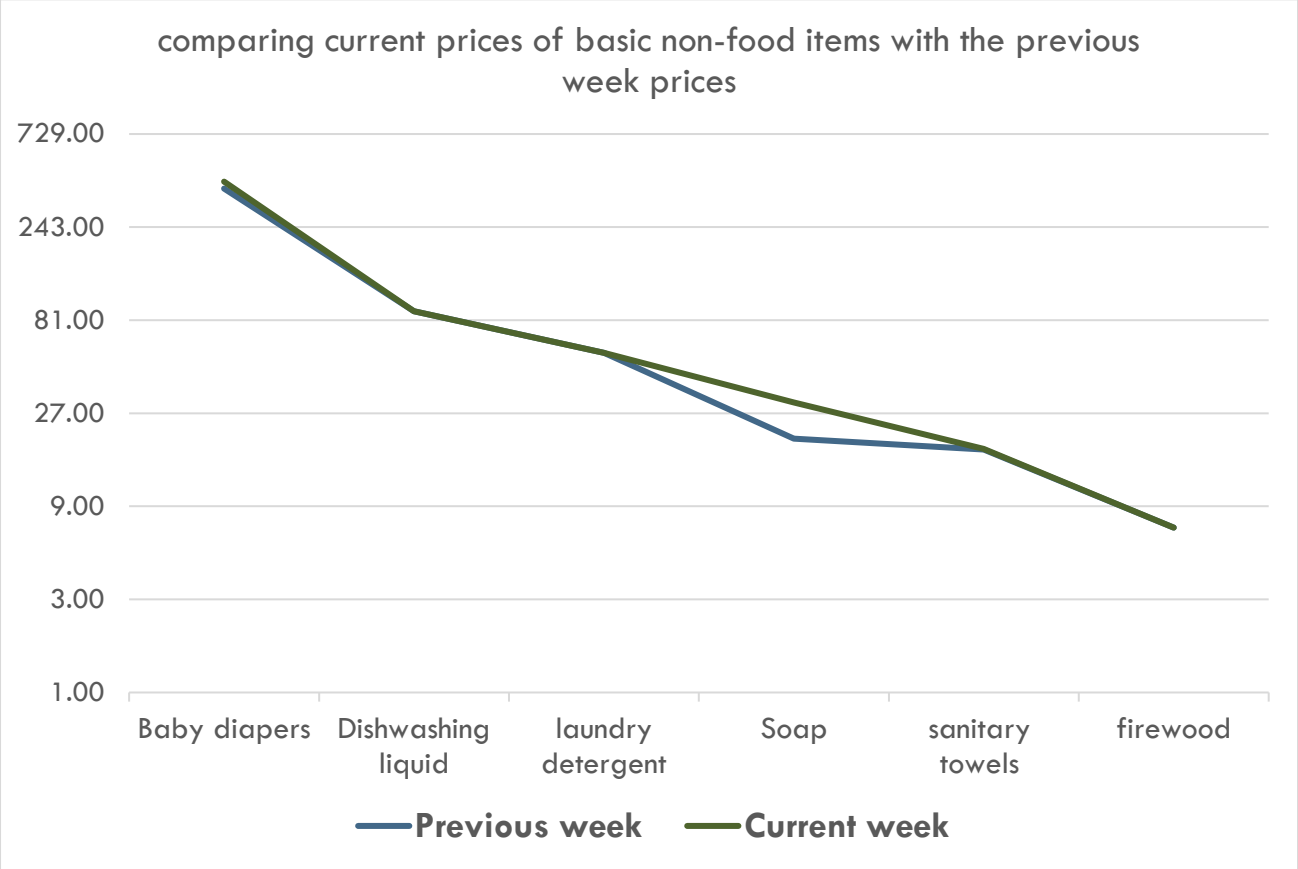

Figure (9): Comparing current prices of basic non-food items with the previous week prices.

5. Gaza Consumer Price Index (GCPI)

Since November 2024, Gaza's economic situation has been closely monitored amid the ongoing war and severe restrictions on the entry of goods and aid. At times, these restrictions escalated into a full blockade, causing significant disruptions to market conditions. To systematically track price fluctuations in essential commodities, the Gaza Chamber of Commerce established an index covering **12 key food and non-food items** commonly purchased by households.

The index is structured to ensure reliability based on two key criteria:

- **It includes basic consumer goods** that the majority of households purchase, rather than items catering to a specific segment.
- **It focuses on consistently available products** throughout the data collection period across northern and southern Gaza.

To determine the quantity of each commodity in the index, two primary data sources were utilized:

- **Palestinian Central Bureau of Statistics (PCBS) reports**, which provided household demographics and monthly per capita consumption rates.
- **A survey of 125 household heads**, which helped refine sub-categories within vegetables and hygiene products that were not explicitly detailed in PCBS reports.

These data points were used to calculate the **weekly consumption rate for a household of 5.5 members**, forming the basis for price comparisons in the following table:

Note: *This basket represents the average weekly consumption of a family consisting of **5.5 members** from the 12 food items included in the index calculation. It does **not** reflect the family **total weekly consumption**, and therefore does **not represent the full needs** of the family.*

Table (6): Basic consumer goods included in the index and their quantities.

#	Item	Unit	Quantity	Relative Importance Index
1	Flour	Kg	12.65	%38
2	Tomato	Kg	3.50	%10.50
3	Onion	Kg	3.50	%10.50
4	Cucumber	Kg	3.45	%10.30
5	Potato	Kg	2.50	%7.50
6	Rice	Kg	1.38	%4.14
7	Oil	Liter	1.37	%4.11
8	Sugar	Kg	1.00	%3
9	Soap	Piece	1.00	%3
10	Sanitary towels	Packet (12 Piece)	1.00	%3
11	Washing liquid	Liter	1.00	%3
12	Dishwashing liquid	Liter	1.00	%3

An analysis of the Relative Importance Index (RII) reveals the following distribution of household consumption priorities:

- *Flour emerges as the most critical item, accounting for 38% of the total index—underscoring its central role in daily food intake.*
- *Vegetables—notably tomatoes, onions, cucumbers, and potatoes—rank next in importance, with RII values ranging from 7.5% to 10.5%.*
- *All remaining items fall within a narrower range of 3% to 4%, indicating more limited but still relevant contributions to household consumption.*

These findings highlight the foundational role of flour in food security, while also emphasizing the significant dietary dependence on key vegetables in the average household meal.

5.1. GCPI – Long Term Trend

The chart below illustrates the monthly value of the food basket, which includes all the items included in the index, and in the quantities specified in the previous table. The following key observations can be drawn from the figure:

- The actual value of the food basket **prior to the war** was **92.44 shekels**, which serves as the **baseline for the index (100%)**.
- During the **first three months** (from early November 2024 to the end of January 2025), there were **significant price disparities between the northern and southern areas** of the Gaza Strip, which necessitated calculating the index separately for each region. However, overall, the index showed a **clear downward trend** in both areas during this period, reaching its **lowest point at 164%** in the **third week of February 2025**. This decline coincided with the **midpoint of the ceasefire** that began on January 19, 2025, a period that witnessed a noticeable improvement in the flow of goods into Gaza. At that time, **prices between the north and south converged significantly**, eliminating major regional differences, and from that point onward, the index has been calculated as a **unified value**.
- Since the **last week of February 2025**, the index began to follow an **upward trend**, which **intensified on March 2, 2025**—the day the Israeli side announced a **complete closure** and halted the entry of **all aid, goods, and supplies** into the Gaza Strip
- Despite the **resumption of aid deliveries on May 20, 2025**, the index continued to **rise sharply**, recording **accelerated increases** and eventually reaching its **peak value of** in Jun 2025.
- During the first half of July, there was a **noticeable decline in the value of the basket**, dropping from about 2,611 **ILS in June** to about **2,488 ILS**. Consequently, the index value fell from **2,825% to 2,691%.**
- This decline does not reflect a recovery in the markets or a real improvement in purchasing power, but is more likely due to **temporary factors**, such as the arrival of limited aid shipments or a short-term decrease in demand resulting from widespread financial hardship among the population.
- Therefore, this decline **should be interpreted with caution**, as it does not indicate a structural improvement in the economic situation, but rather **serves as another indicator of the fragility and volatility of the local market under the pressure of worsening humanitarian and security conditions.**

Table (7): Consumer Basket Value and Price Index from November 2024 to July 2025

Month	Basket value (ILS)			index value (%)		
	North	South	unified price	North	South	unified price
Nov-24	1,987.06	782.00	-	2,150%	846%	-
Dec-24	1,251.87	837.60	-	1,354%	906%	-
Jan-25	584.32	395.76	-	632%	428%	-
Feb-25	156.59	156.59	156.59	169%	169%	169%
Mar-25	-	-	385.03	-	-	417%
Apr-25	-	-	775.88	-	-	839%
May-25	-	-	1,857.71	-	-	2,010%
Jun-25	-	-	2,611.37	-	-	2,825%
July-25	-	-	2,487.72	-	-	2,691%

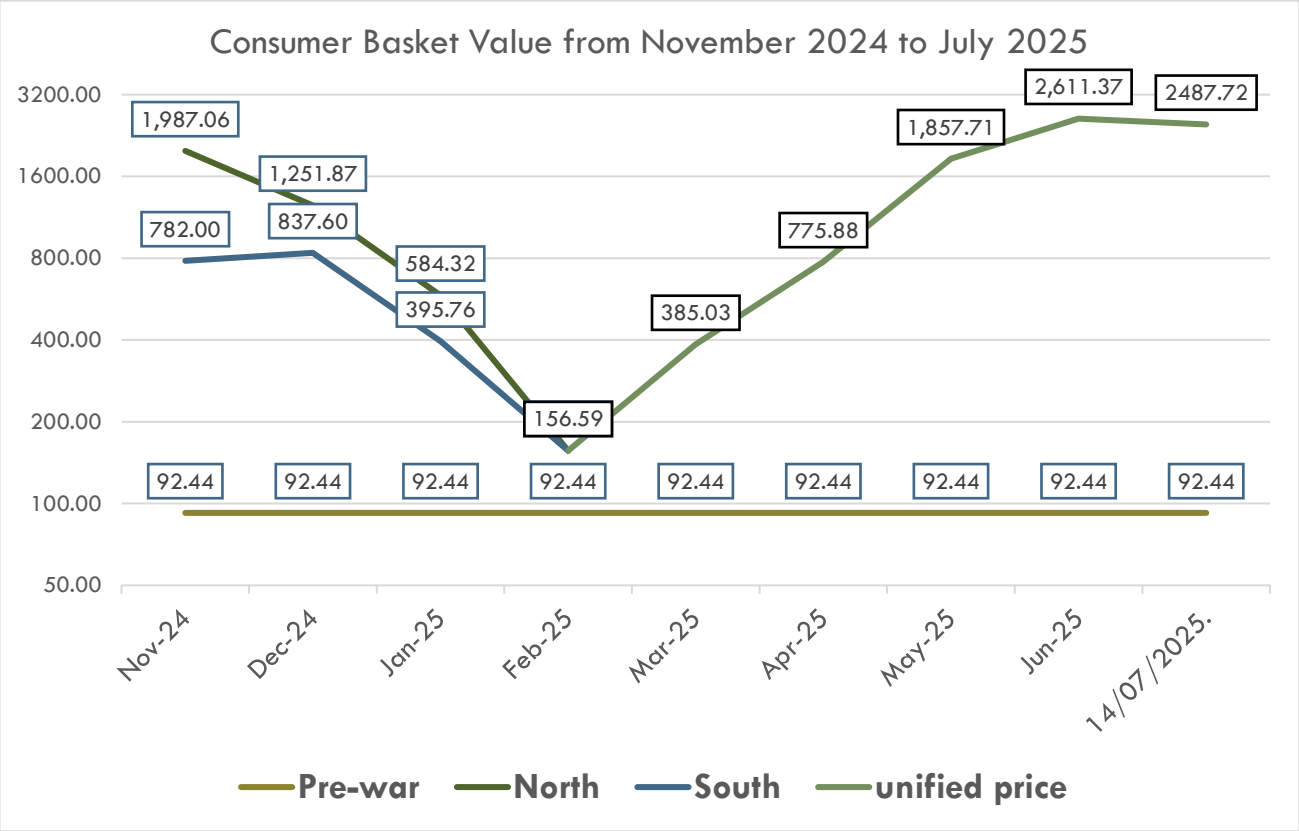

Figure (10): Consumer Basket Value from November 2024 to July 2025

5.2. GCPI – Short Term Fluctuation

To monitor short-term market dynamics, the table and chart below illustrate the **daily value of basket and its corresponding price index** over the past two weeks (covering both the current and previous reporting periods).

5.2.1. Quantitative Analysis

- **Average Basket Value during the Period**: The average value of the consumer basket from July 1 to July 14, 2025, was approximately **2,553 ILS**.
- **Highest Basket Value**: The peak was recorded on **July 11** at about **3,504 ILS**, marking the highest price surge during the period.
- **Lowest Basket Value**: Registered on **July 5** at about **1,868 ILS**, reflecting a temporary decline in prices.
- **Rate of Change during the Period**: The basket value rose from **2,222 ILS on July 1** to about **3,403 ILS on July 14**, indicating an increase of approximately **53.2%** over two weeks.
- **Average Price Index**: The average price index during the period reached **2,610%**, compared to pre-war levels.
- **Daily Fluctuation Rate**: The index showed significant daily fluctuations, ranging between **2,021% and 3,791%**, with a sharp rise after July 10.

Qualitative Analysis

- **Upward Trend**: The data indicates a consistent upward trend in both basket value and price index, particularly after **July 10**, likely driven by exceptional market pressures such as deteriorating security conditions or severe shortages in food supply.

- **Sharp Rise in Mid-Period**: Between **July 10 and 14**, there was a steep surge in prices, with the index exceeding **3,000%**, signaling a rapid inflationary crisis.
- **Direct Impact on Food Security**: These sharp price increases reflect a significant deterioration in household purchasing power, especially amid limited income and the economic contraction caused by the ongoing blockade and war.
- **Effect of Weak Market Oversight**: The abrupt and irregular price spikes on certain days indicate **weak enforcement of pricing controls** and insufficient market regulation.
- **Market Instability**: The evident fluctuations suggest a **lack of stability in supply chains and aid distribution**, leading to extreme day-to-day price volatility.
- **Coefficient of variation (CV)**: 22.4%, reflecting moderate volatility in daily price levels.

The relatively moderate *CV indicates that, despite fluctuations in the index, overall price volatility remained moderate during the observed period. This suggests a degree of short-term market stability, even amid broader inflationary pressures.*

Table (8): Daily Changes in Consumer Basket Value and Price Index (01–14 July 2025).

#	Date	Basket value (ILS)	index value (%)
1	01/07/2025	2,222.45	2,404%
2	02/07/2025	2,252.45	2,437%
3	03/07/2025	2,212.35	2,393%
4	04/07/2025	2,057.71	2,226%
5	05/07/2025	1,868.40	2,021%
6	06/07/2025	1,994.98	2,158%
7	07/07/2025	2,075.08	2,245%
8	08/07/2025	2,208.78	2,389%
9	09/07/2025	2,263.60	2,449%
10	10/07/2025	2,493.10	2,697%
11	11/07/2025	3,503.95	3,791%
12	12/07/2025	3,128.48	3,384%
13	13/07/2025	3,144.04	3,401%
14	14/07/2025	3,402.70	3,681%

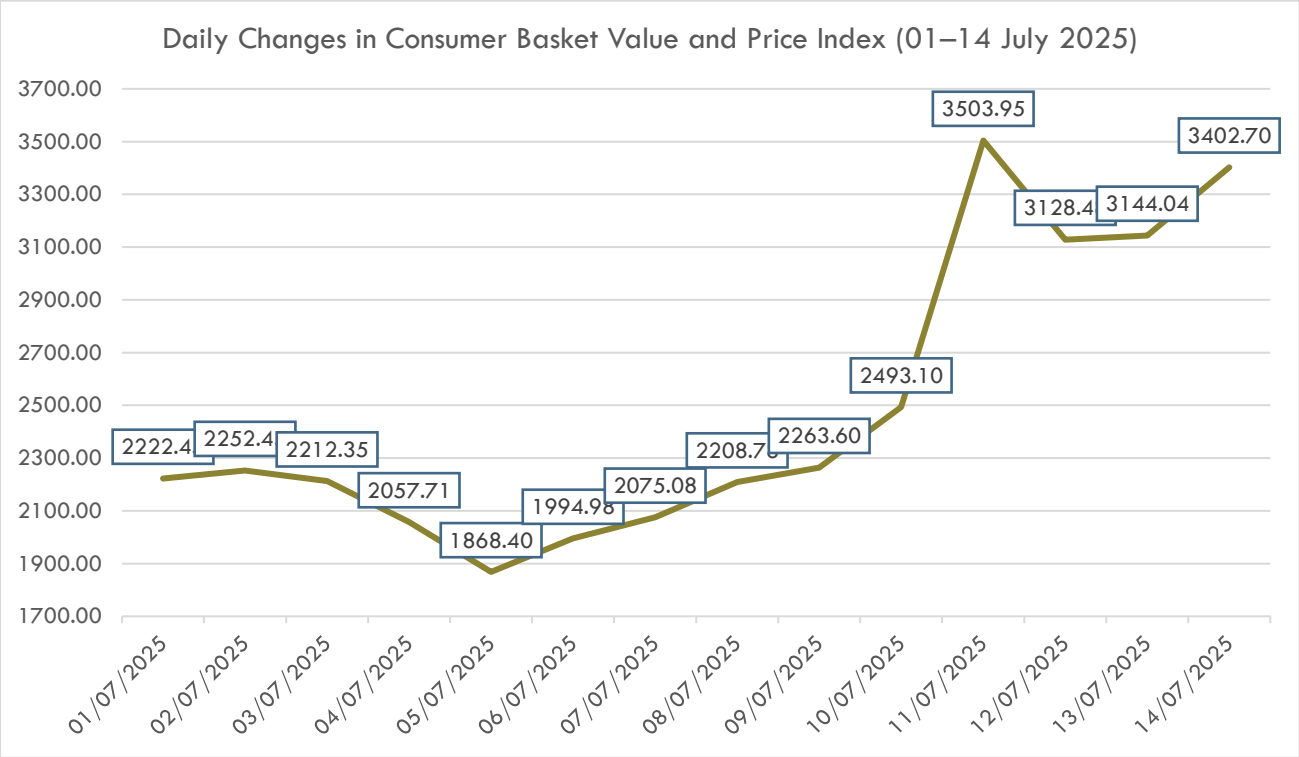

Figure (11): Daily Changes in Consumer Basket Value and Price Index (01–14 July 2025).

6. Cash-out commission:

6.1. Long-term trend:

The cash-out commission rate witnessed a gradual and notable increase during the period from mid-January to the end of June 2025. It started at 17% in the third week of January and continued to rise steadily, reaching 31% by the end of March. During April and May, the commission fluctuated between 30% and 32%. The rate accelerated in June to 42%, and by the reporting period, it had declined to 40% in July and stabilized. These figures reflect the growing financial pressures in the market and the rising costs of obtaining cash.

Across 26 weeks of commission data, spanning January through July 14, 2025, the average withdrawal rate stood at 29.4%, accompanied by a standard deviation of 9.7%. This yields a coefficient of variation (CV) of approximately 33%, pointing to a moderate level of variability in withdrawal behavior over the reporting period. Such fluctuation may reflect shifts in liquidity needs, access constraints, or evolving beneficiary priorities—key factors for financial resilience planning and digital inclusion strategies.

Table (9): Monthly cash out commission rate (January – July 2025).

Month	From	To	cash out commission (%)
Jan-25	19/01/2025	31/01/2025	17%
Feb-25	01/02/2025	28/02/2025	18%
Mar-25	01/03/2025	31/03/2025	27%
Apr-25	01/04/2025	30/04/2025	30%
May-25	01/05/2025	31/05/2025	32%
Jun-25	01/06/2025	30/06/2025	42%
July-25	01/07/2025	21/07/2025	40%

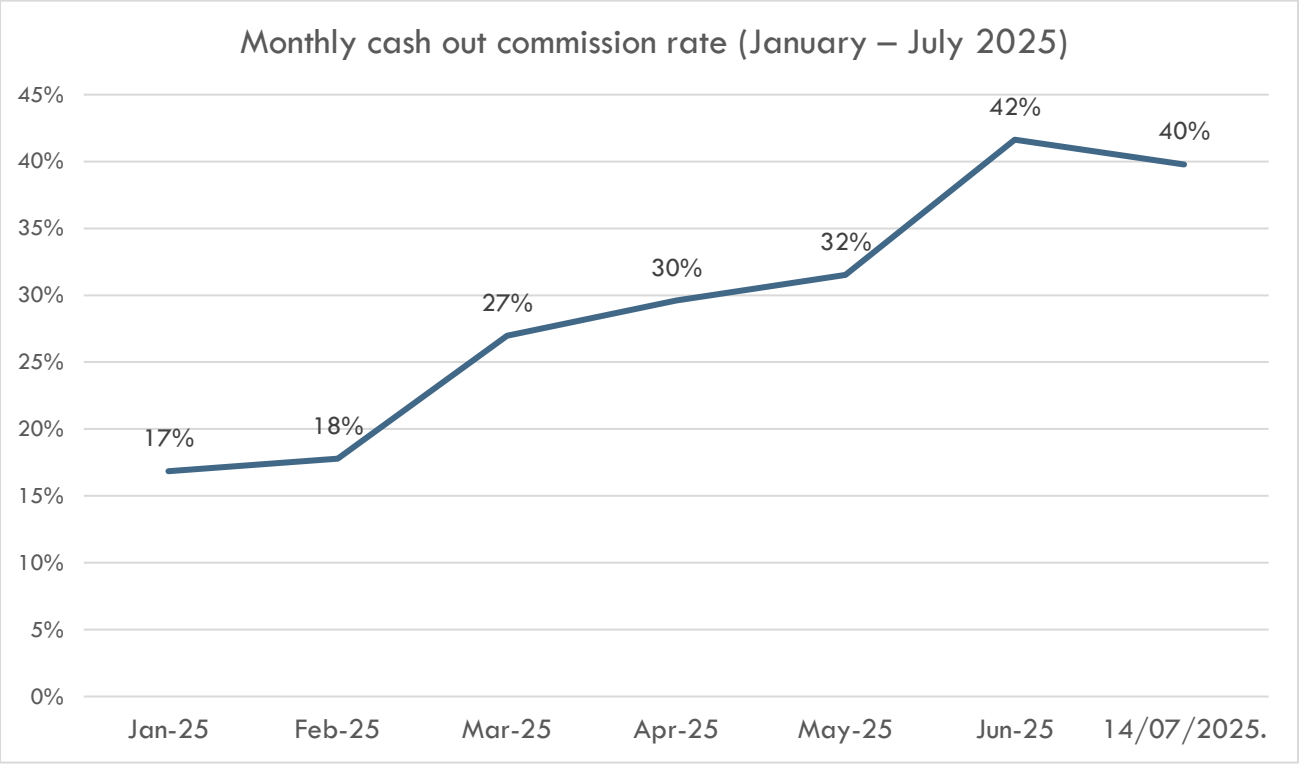

Figure (12): Monthly cash out commission rate (January – July 2025).

6.2. Short-term fluctuation:

The following table provides detailed data on cash-out commission rates over the past two weeks (July 1-14, 2025). Daily data for the first week showed significant fluctuations, ranging between 42% and 36%, before stabilizing at 40% in the second week of the reporting period.

Key Findings:

Between July 1 and July 14, 2025, daily commission rates exhibited persistent elevation and controlled variability across the cash market. Notably, the rate held at **45% for five consecutive days**, signaling sustained market pressure—likely driven by concentrated demand linked to **humanitarian disbursements** or **private remittance activity**.

This was followed by a **decline to 40%**, with subsequent fluctuations between **41% and 45%**, reflecting a climate of **monetary fragility** and **market uncertainty**. Though a slight easing occurred toward the end of June, the period's overall commission levels remained **substantially above historical averages**, pointing to a **continuing liquidity crisis**.

Across this 14-day window, the **average withdrawal commission** settled at **39.8%**, with a **standard deviation of 2%**—resulting in a **coefficient of variation of approximately 5%**. This suggests relatively **moderate intra-period volatility**, despite the elevated rate environment.

Table (10): Daily cash out commission from 01/07/2025 to 14/07/2025.

#	Date	cash out commission
1	01/07/2025	41%
2	02/07/2025	42%
3	03/07/2025	42%
4	04/07/2025	42%
5	05/07/2025	35%

6	06/07/2025	36%
7	07/07/2025	40%
8	08/07/2025	40%
9	09/07/2025	40%
10	10/07/2025	40%
11	11/07/2025	39%
12	12/07/2025	40%
13	13/07/2025	40%
14	14/07/2025	40%

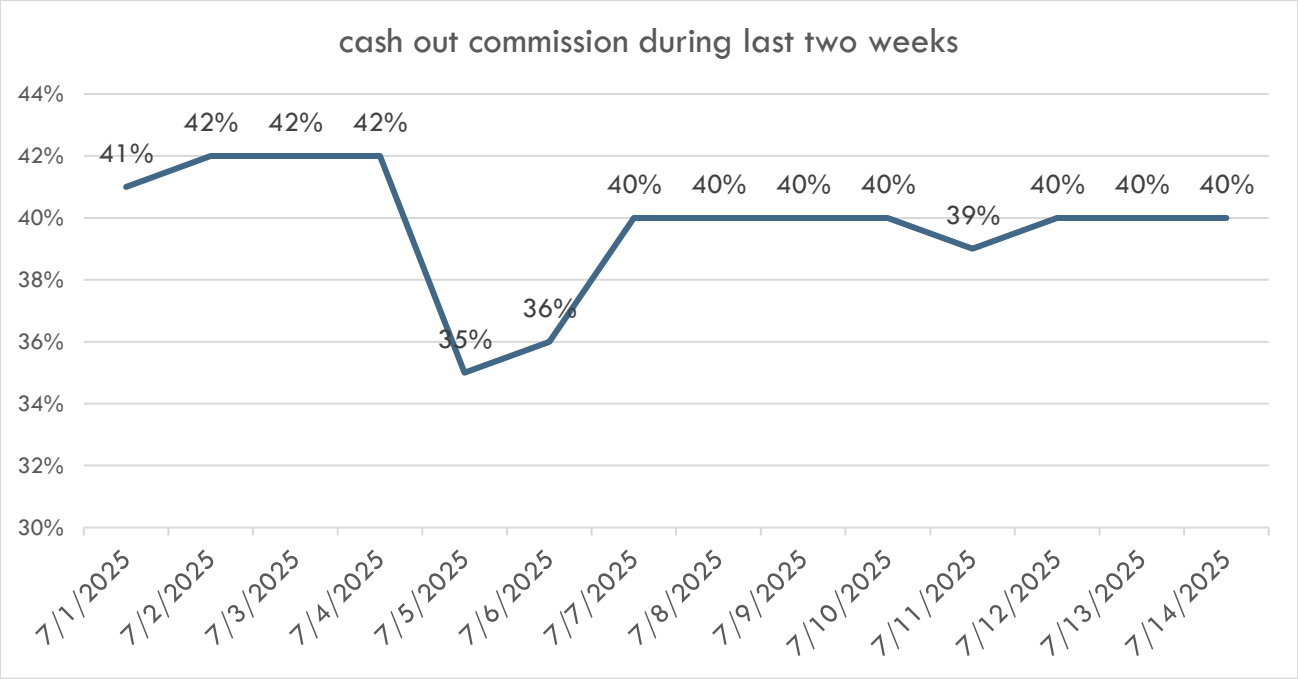

Figure (13): Daily cash out commission from 01/07/2025 to 14/07/2025.

7. Coordination Mechanism:

Nearly 8 weeks after the formal reopening of Gaza's border crossings, truck movement remains critically low—far below both pre-war volumes and levels recorded during the immediate pre-closure period (before 2 March 2025). Current access is restricted almost exclusively to **humanitarian shipments**, with **no functional coordination mechanism** allowing entry of private sector goods.

While a handful of trucks carrying commercial items—such as basic food products, coffee, nuts, and chocolate—have entered Gaza in recent weeks, these shipments were relabeled as **"humanitarian aid"** and subjected to **extraordinarily high coordination fees**, reportedly reaching **hundreds of thousands of shekels** per load according to local traders. These inflated entry costs have translated directly into **exorbitant market prices**, exacerbating affordability challenges for civilians.

Aid Access and Distribution Breakdown

- Humanitarian deliveries are currently limited to a narrow group of actors: **WFP, WHO, ICRC, WCK, ANERA**, and **Emirates Red Crescent (Faris Al Shahm Initiative)**.

- The vast majority of aid trucks are **looted on routes**, unable to reach designated warehouses—a consequence of **fixed routes and schedules imposed by Israeli authorities**, which have proven highly insecure.
- Distribution centers overseen by the Israeli military and operated by the American organization "GHF" have **repeatedly failed** to deliver aid to intended recipients.
- These facilities were not only ineffective in reaching beneficiaries, but reports indicate they became **deadly zones**, where hundreds of civilians were killed while attempting to access aid. According to reports from the Palestinian Ministry of Health in Gaza, as of the reporting period, **851 people have died** while trying to access assistance, in addition to **more than 5,600 injured**.

This snapshot reflects not just logistical dysfunction but a **crisis of humanitarian integrity**—where costly market distortions, systematic looting, and unsafe aid mechanisms deepen suffering rather than alleviate it.

8. Difficulties:

- **Closure of crossings:** Severely restricting the entry of humanitarian aid and private sector goods, leaving supplies critically low.
- **Insufficient aid deliveries:** Despite claims of resumed shipments on **May 17, 2025**, the total number of trucks have entered up to the date of this report does not exceed **1,549 trucks**, which is less than the number that used to enter in just three days before the war.
- **Market instability:** Shortages and price surges creating extreme economic distress.
- **Economic Challenges:**
    - **Hunger, malnutrition, and food insecurity** have significantly worsened due to insufficient supplies and the entry of only very limited quantities of flour and food items. This is further exacerbated by the chaotic distribution mechanisms imposed by the Israeli side, which are often accompanied by disorder and looting.
    - **Cash liquidity crisis:** The commission charged to obtain cash has reached extremely high levels, making it extremely difficult for people to purchase essential goods.
    - **Severe shortage of raw materials**, threatening the shutdown of many small businesses that are barely managing to operate at a minimal level under the current conditions.
- **Food and Agricultural Impact:**
    - **Ongoing closure of commercial crossings** driving food shortages and sharp price increases.
    - **Flour scarcity:**
        - **All bakeries shut down** due to lack of supplies.
        - **Price surged more than 22 times pre-war levels**.
    - **Reduced agricultural production** due to water shortages and lack of farming input materials.
    - **Higher reliance on imported goods** at **inflated costs**.

9. Recommendations:

1. **Humanitarian Aid and Essential Supplies**
    a. **Increase the quantity and variety** of humanitarian aid entering Gaza to address critical nutritional needs.

b. **Ensure consistent and sufficient aid flows**, as recent deliveries, remain drastically below required levels.
c. **Allow the private sector to resume imports** of basic commodities, expanding the types and quantities of goods to stabilize market conditions across northern and southern Gaza.

2. **Energy and Infrastructure**
    a. **Enable access to solar energy** to power **cold storage** facilities for dairy products, frozen meats, and vegetables.
    b. **Provide funding to rehabilitate commercial facilities**, including **storage and cold storage units**, ensuring early recovery and market stabilization.
    c. **Allow humanitarian and commercial trucks** to access **all crossings and routes**, reducing transportation costs and improving supply distribution.
    d. **Ensure adequate fuel supplies and truck spare parts** for transportation companies, mitigating unjustified price hikes in commodity markets.
3. **Agricultural Recovery**
    a. **Urgently permit imports of agricultural and livestock production inputs**—seeds, tools, fertilizers—to support small farmers and **reduce dependence on external supplies**.
4. **Strengthen partnerships between chambers of commerce and humanitarian organizations** (such as Tasdeer, Anera, and WFP) to support recovery in **trade, industry, and agriculture**.
5. **Market Stability and Financial Access**
    a. **Promote electronic wallets and other e-payment systems** among consumers and retailers, allowing businesses to accept digital humanitarian vouchers by restoring **power and internet** access.
    b. **Find effective, transparent mechanisms** to coordinate commodity entry through crossings, ensuring proper **prioritization and distribution**.
    c. **Introduce market control measures** to **prevent monopolies**, regulate **pricing**, and **reduce inflation**, ensuring fair access to essential goods.

These actions are crucial to mitigating the **worsening humanitarian crisis**, stabilizing **economic conditions**, and supporting **long-term recovery** in Gaza.

10. Conclusion

Between 8 and 14 July 2025, Israeli military operations in the Gaza Strip escalated sharply, triggering a new wave of mass displacement that significantly altered the demographic landscape, particularly in East Gaza and Kan Younis. This was accompanied by a severe deterioration in humanitarian conditions amid a sharp decline in the number of incoming trucks and a continued shrinking of safe areas for civilians. During the reporting week, only 113 trucks entered Gaza compared to 84 the previous week. On the economic front, the availability of basic goods continued to decline, with unprecedented price hikes—over 14,000% for some items like onions and more than 9,000% for others such as sugar. The Gaza Consumer Price Index (GCPI) continued its upward trend, driven by acute scarcity and the absence of effective market regulation. The cost of the essential goods basket peaked at 3,504 shekels. Meanwhile, cash liquidity remained a major crisis for civilians, with high cash-out commissions ranging from 35% to 42%. This report reflects the ongoing deterioration of Gaza's humanitarian and economic landscape, amid the absence of any prospects for a sustainable ceasefire or meaningful improvement in emergency response mechanisms.

11. Annex

12.1. Daily prices:

Table (11): Standard deviation & coefficient of variance of daily prices

#	Item	08/07	09/07	10/07	11/07	12/07	13/07	14/07	Aver.	St. Dev	C.V
1	Flour	1000	1175	1500	1750	1250	1300	1750	1389.29	287.90	**20.7**
2	Onion	160	160	160	400	400	400	400	297.14	128.29	**43.2**
3	Sugar	350	320	350	330	220	210	210	284.29	67.29	**23.7**
4	Lemon	60	100	80	100	80	100	100	88.57	15.74	**17.8**
5	Rice	45	50	50	70	75	80	80	64.29	15.39	**24**
6	Oil	45	45	55	60	55	52	60	53.14	6.26	**11.8**
7	Kidney beans	13	13	18	30	25	20	20	19.86	6.15	**31**
8	Macaroni	40	40	40	40	50	50	50	44.29	5.35	**12.1**
9	Pepper	36	40	40	48	40	40	40	40.57	3.60	**8.9**
10	Potato	35	35	35	40	35	32	40	36.00	2.94	**8.2**
11	Tomato	60	55	55	60	60	60	60	58.57	2.44	**4.2**
12	Cucumber	55	57	60	60	60	60	60	58.86	2.04	**3.5**
13	Eggplant	27	30	27	28	30	27	28	28.14	1.35	**4.8**

Coefficient of Variation (CV): Price Dispersion Analysis

The Coefficient of Variation (CV) is a normalized measure of price dispersion, calculated as:
CV = (Standard Deviation ÷ Mean) × 100%

It evaluates price fluctuation in relation to a commodity's average cost, allowing for meaningful comparisons across items with differing price levels.

This Week's Highlights:

- Onion showed the highest CV at 43.2%, marking the greatest relative volatility.
- Followed by: Sugar at 23.7%, Flour at 20.7%, Lemon at 17.8%
- In contrast, flour registered the highest standard deviation (287.9), indicating the largest absolute price variation, though not the highest relative fluctuation.

Interpreting the Metrics:

- CV reflects relative dispersion, providing a volatility measure that accounts for price scale.
- Standard deviation represents absolute variability, independent of the item's price level.

Because of these conceptual differences, CV is a more efficient and comparable tool for assessing price volatility across commodities with varied cost structures.

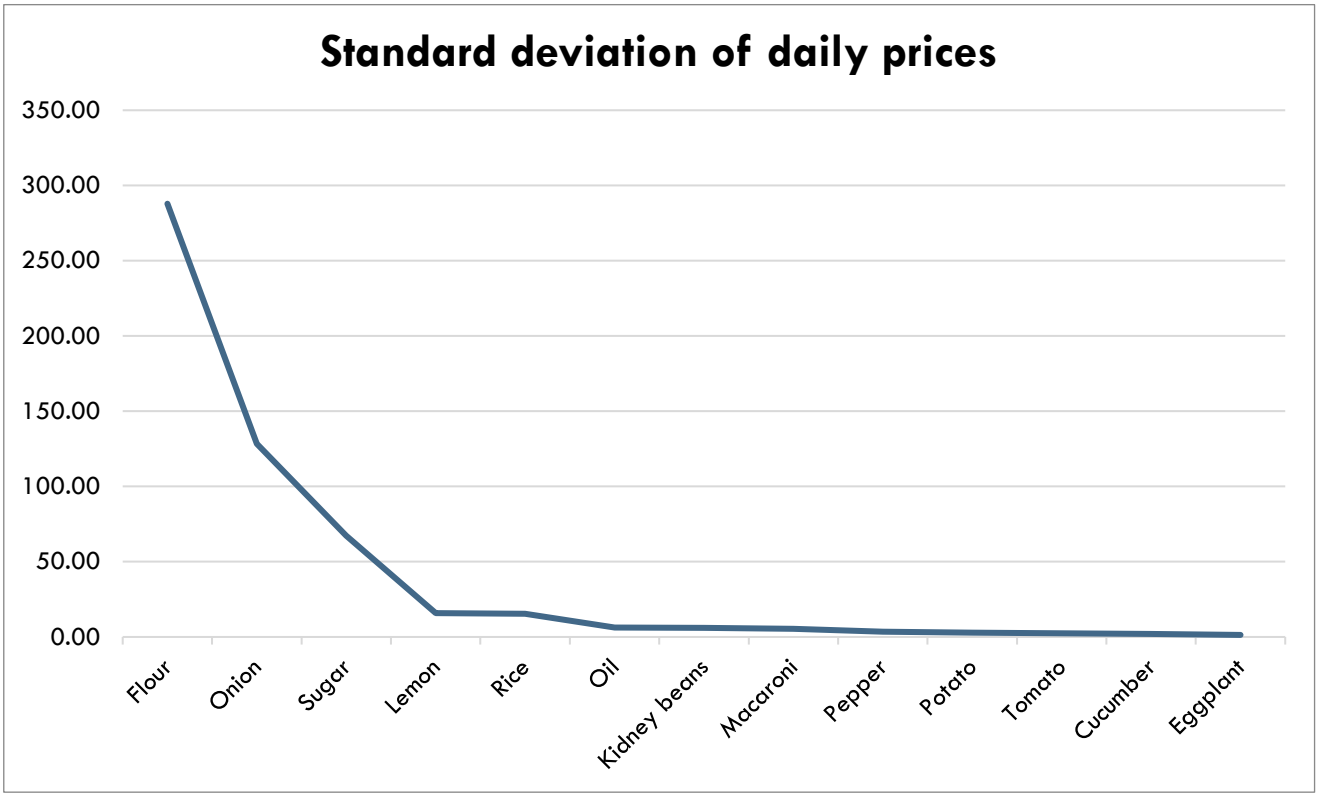

Figure (14): Standard deviation of daily prices.

12..2. Price Volatility:

From the previous tables, goods can be grouped according to the severity of price fluctuations based on the standard deviation value into three categories:

Fixed-price goods:

These are goods whose standard deviation is (0), meaning that their prices remained completely stable throughout the reporting period. No items are locating in this category.

Stable-price goods:

These are goods whose standard deviation ranges between (0-1), meaning that their prices changed at slight rates during the reporting period. No items are locating in this category.

Volatile-price goods:

These are commodities whose standard deviation is greater than (1), meaning that they have experienced sharp price fluctuations during the reporting period. This week, all commodities experienced sharp price fluctuations.

12.3. Gaza Consumer Price Index Values:

Table (12): The value of the basket which contains all the items of the index from 01/11/2024 to 30/01/2025

Period	From	To	Northern Gaza Strip		Southern Gaza Strip	
			Basket Value (ILS)	Index Value (%)	Basket Value (ILS)	Index Value (%)
Week 01	01/11/2024	07/11/2024	2,524.69	2,731%	666.75	721%
Week 02	08/11/2024	14/11/2024	2,274.29	2,460%	647.96	701%
Week 03	15/11/2024	21/11/2024	1,862.35	2,015%	868.28	939%
Week 04	22/11/2024	28/11/2024	2,087.81	2,259%	938.89	1,016%
Week 05	29/11/2024	05/12/2024	1,341.35	1,451%	1,000.53	1,082%

Period	From	To	Northern Gaza Strip		Southern Gaza Strip	
			Basket Value (ILS)	Index Value (%)	Basket Value (ILS)	Index Value (%)
Week 06	06/12/2024	12/12/2024	1,341.35	1,451%	1,000.53	1,082%
Week 07	13/12/2024	19/12/2024	1,307.71	1,415%	790.55	855%
Week 08	20/12/2024	26/12/2024	1,136.86	1,230%	765.48	828%
Week 09	27/12/2024	02/01/2025	950.48	1,028%	629.52	681%
Week 10	03/01/2025	09/01/2025	799.07	864%	569.72	616%
Week 11	10/01/2025	16/01/2025	769.29	832%	459.98	498%
Week 12	17/01/2025	23/01/2025	485.70	525%	292.27	316%
Week 13	24/01/2025	30/01/2025	235.98	255%	231.81	251%

Regional Price Disparities in Gaza: 13-Week Analysis

A statistical assessment was conducted to compare **basket prices between Northern and Southern Gaza** over a **13-week period** from **November 1, 2024, to January 24, 2025**, highlighting notable regional market disparities.

Methodology and Findings

- **Normality assumption not met** (*Shapiro-Wilk test, p = 0.012*); analysis employed the **Wilcoxon Signed-Rank Test**
- The test revealed a **statistically significant difference** in prices between the two regions (*Z = -3.181, p = 0.001*)
- **Effect size (r = 0.88)** indicates the difference is **substantial and practically meaningful**, not just statistical noise

Northern Gaza Market Trends

- **Average basket price**: **1,317 NIS**
- **Standard deviation**: **699 NIS**
- **Coefficient of variation (CV)**: **53.1%**
- Indicates **high price volatility**, reflecting instability in availability and cost

Southern Gaza Market Trends

- **Average basket price**: **682 NIS**
- **Standard deviation**: **249 NIS**
- **Coefficient of variation (CV)**: **36.5%**
- Also suggests market instability, but to a **lesser extent** than in the north

Interpretation

Price fluctuations are **notably more severe in Northern Gaza**, where higher averages and volatility point to **less stable market conditions**. These regional disparities underscore the need for **targeted interventions** to address localized barriers to access and pricing stability.

Table (13): The value of the basket which contains all the items of the index from 31/01/2024 to 30/06/2025.

Period	From	To	Basket value (unified price) ILS	Index Value (%)
Week14	31/01/2025	06/02/2025	154.06	167%
Week15	07/02/2025	13/02/2025	164.26	178%
Week16	14/02/2025	20/02/2025	151.51	164%
Week17	21/02/2025	27/02/2025	155.59	168%
Week18	28/02/2025	06/03/2025	238.91	258%

Period	From	To	Basket value (unified price) ILS	Index Value (%)
Week19	07/03/2025	13/03/2025	269.61	292%
Week20	14/03/2025	20/03/2025	404.21	437%
Week21	21/03/2025	27/03/2025	513.75	556%
Week22	28/03/2025	03/04/2025	581.87	629%
Week23	04/04/2025	10/04/2025	666.69	721%
Week24	11/04/2025	17/04/2025	659.51	713%
Week25	18/04/2025	24/04/2025	880.02	952%
Week26	25/04/2025	01/05/2025	1015.16	1,098%
Week27	02/05/2025	08/05/2025	1438.19	1,556%
week28	09/05/2025	15/05/2025	1334.83	1,444%
week29	16/05/2025	22/05/2025	2,232.80	2,415%
week30	23/05/2025	29/05-2025	2405.41	2,602%
week31	30/05/2025	05/06/2025	2291.90	2,479%
week32	06-06-2025	12-06-2025	2838.79	3071%
week33	13-06-2025	19-06-2025	2860.36	3061%
week34	20-06-2025	26-06-2025	2489.64	2636.22%
week35	27/06/2025	03/07/2025	2303.00	2491.34%
week36	04/07/2025	10/07/2025	2137.38	2312.18%

Basket Price Volatility in Gaza: 23-Week Statistical Overview

A statistical analysis of basket prices across the Gaza Strip from **January 31 to July 10, 2025** reveals persistent volatility in market behavior:

- **Average price**: **1,225.5 NIS**
- **Standard deviation**: **984.4 NIS**
- **Coefficient of variation (CV)**: **80.3%**

This elevated CV indicates a **high degree of price fluctuation** relative to the mean, reflecting significant instability throughout the 23-week period.

Impact of Current Week Data

With the inclusion of the current week:

- **Average price decreased by 8.9%**, declining from **1,346 to 1,225.5 NIS**
- **Standard deviation showed a slight increase, indicating greater dispersion around the mean.**
  • CV rose by 8.6%, suggesting an increase in relative volatility.
- This indicates that the rise in absolute prices was accompanied by an increase in relative volatility, reflecting continued price instability despite some apparent improvement.