



## GIEWS Country Brief Yemen

Reference Date: 10-March-2021

### FOOD SECURITY SNAPSHOT

- Conflict continues to threaten agricultural livelihoods
- Well below-average 2020 cereal harvest estimated, stable cereal import requirements
- Over 16 million food insecure people in January-June 2021 period

### Conflict continues to threaten agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities differs depending on location. In Central highlands and Southern uplands, barley, maize and sorghum harvests finished last October and November. In Central highlands, the harvest of the second season wheat crops that were planted last December is expected to start soon. In Eastern Plateau, wheat crops have already been harvested. According to actual meteorological observations, seasonally dry weather conditions prevailed in January and the first two decades of February across the country. In Central highlands and Southern uplands with distinct rainy seasons, precipitations are expected to pick up from March onwards.

Unabating conflict continues to compromise all economic activities, including agriculture. Although prices of some agricultural inputs seasonally declined in January 2021, inputs remain expensive and often in short supply. High fuel prices are constraining agricultural activities, particularly irrigation. To cope with the elevated production costs, reports indicate that farmers shifted from irrigated to rainfed crops, which yield lower output and rely more on family labour instead of employing hired workers.

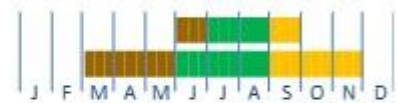
Regarding the desert locust outbreak, at the end of February, low numbers of solitarious adults were reported only along the Red Sea coastal plains as conditions have been drying out in the rest of the country. No breeding is expected until the rains resume from April. The country's capacity to survey and control pests remains constrained due to lack of access in some breeding areas and lack of equipment.

### Yemen

Crop Calendar

(\*major foodcrop)

Wheat\*  
Sorghum



Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

### Yemen

#### Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Sorghum	207	170	160	-5.9
Wheat	155	140	130	-7.1
Millet	55	40	40	0.0
Others	58	35	35	0.0
<b>Total</b>	<b>475</b>	<b>385</b>	<b>365</b>	<b>-5.2</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

## Well below-average cereal harvest in 2020

Taking into account conflict related constraints as well as the outbreaks of pests, total cereal production in 2020 was estimated at 365 000 tonnes, about 5 percent below the previous year's harvest and almost 25 percent below the five-year average.

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on food assistance and commercial imports to satisfy its domestic consumption requirements for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 and 10 percent, depending on the performance of the domestic harvest.

The import requirement for cereals to guarantee a sufficient calorie in-take in the 2021 marketing year (January/December) is forecast at an average level of 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

It is estimated that slightly more than 5.5 million tonnes of food, out of which over 60 percent were wheat grain and flour, were imported in 2020, entering through seaports and land ports. Humanitarian organizations imported 12 percent of the total food imports, while commercial imports constitute the rest. The total amount was about 11 percent lower than in 2019.

## Over 16 million people food insecure

Economic conditions in the country remain dire. The conflict is further hampering the already constrained livelihood activities and humanitarian access. Income earning opportunities have declined due to COVID-19-related business disruptions.

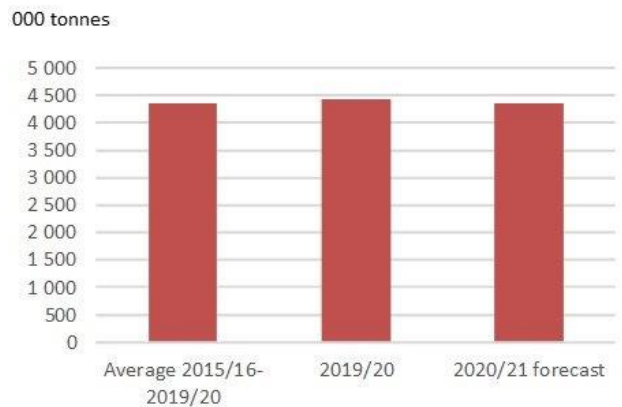
The country's already weak fiscal position has been eroded by the low prices of oil, the depletion of hard currency reserves and the decline in remittances. After November 2019, when USD 1 was traded for YER 575 across the country, the exchange rates between southern and northern governorates started diverging significantly. In January 2021, USD 1 was traded for YER 770 in the south, while in the north the average exchange rate, controlled by the Central Bank of Yemen in Sana'a, remained stable at YER 600 per 1 USD.

Official fuel prices remain unchanged, but supply of fuel at official prices remains very scarce. On the parallel market, fuel sells at a premium of 60-90 percent. At the national level, between December 2020 and January 2021, the price of petrol on the parallel market increased by 45 percent, while diesel and cooking gas increased by 32 and 26 percent, respectively, due to the high demand for heating during the winter and disruptions in fuel import flows. Overall, fuel prices remained over 250 percent above the February 2015 levels.

In January 2021, prices of several food commodities remained stable or eased slightly compared to the previous month, but they often still exceed their pre-crisis levels (February 2015) by two or three times. Although no physical shortages of goods are reported, the high prices severely limit households' access.

## Yemen

### Cereals Imports

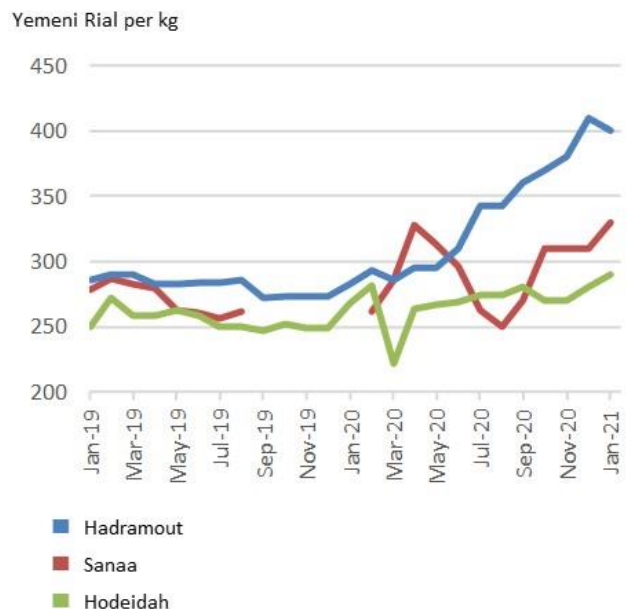


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

## Yemen

### Retail price of wheat flour



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Humanitarian funding significantly reduced in 2020 resulting in many operations being scaled down leaving the needs of millions of people unattended. Further scaling down is expected in 2021 after the March 2021 pledging conference garnered only USD 1.7 billion, falling short of the total 2021 appeal of USD 3.85 billion. Between January and June 2021, even with the planned delivery of humanitarian assistance, the number of food insecure people is projected to increase from 13.5 million to 16.2 million, including 11 million in IPC Phase 3: “Crisis”, 5 million in IPC Phase 4: “Emergency” and 47 000 people in IPC Phase 5: “Catastrophe”.

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# GIEWS Country Brief Yemen

Reference Date: 10-June-2020

## FOOD SECURITY SNAPSHOT

- Conflict continues to threaten agricultural livelihoods
- Well below-average cereal harvest forecast for 2020, stable cereal import requirements
- About 24.3 million people estimated in need of humanitarian assistance

## Conflict continue to threaten agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities differs depending on location. In Central Highlands, with two distinct rainy seasons, the 2020 first season wheat crop was harvested in April. The second rainy season should start in July and wheat sowing, for harvest from September, is about to start. Planting of rainfed sorghum, for harvest from mid-September, will start in mid-June. In Southern Uplands, with only one rainy season, planting of the 2020 wheat crop, for harvest from mid-October, will start in early June and will continue until mid-July. In the coastal areas, sorghum was planted in May and harvesting should start in September.

Despite attempts to negotiate ceasefire, persistent fighting continues to seriously compromise all economic activities, including agriculture. Agricultural inputs, mostly imported, remain in short supply and expensive. High fuel prices, albeit lower than one year ago reflecting the slowdown in the global economy, are constraining agricultural activities, particularly those related to irrigated crops. To cope with the elevated production costs, farmers have shifted from irrigated to rainfed crops, which yield lower output, and rely more on family labour instead of employing hired workers.

Torrential rains in mid-April 2020 caused floods in the north of the country, particularly in the Marib and Sana'a governorates. In the third decade of April, intense rains caused floods also in the southern part of the country (Hadramamaur, Shabwah, Aden, Lahj, Al Dhale and Taiz governorates) which were already affected by floods at the end of March. The cities of Sana'a and Aden were exceptionally hard hit by April floods and the lack of adequate drainage system and rainwater management led to a disruption of basic services. Floods coincided with the harvesting of wheat in Central Highlands and planting of sorghum in Southern Uplands and Central Highlands. Planting activities were delayed, while standing crops still to be harvested were

## Yemen

Crop Calendar

(\*major foodcrop)

Wheat\*

Sorghum



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

## Yemen

### Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019 percent
	000 tonnes			
Sorghum	207	170	160	-5.9
Wheat	155	140	130	-7.1
Millet	55	40	40	0.0
Others	58	35	35	0.0
<b>Total</b>	<b>475</b>	<b>385</b>	<b>365</b>	<b>-5.2</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

damaged. Damages on agricultural infrastructure and livestock were also reported.

Abundant precipitation enabled breeding of desert locusts, particularly in the interior. Here, hopper bands and mature swarms have formed in May, some of which could migrate to northern Somalia and northeast Ethiopia. The country's capacity to survey and control pests is minimal due to lack of equipment.

### Well below-average cereal harvest in 2020

Taking into account conflict-related constraints as well as the outbreaks of pests, total cereal production in 2020 is forecast at 365 000 tonnes, about 5 percent below the previous year's harvest and almost 25 percent below the five-year average.

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on food assistance and commercial imports to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 and 10 percent, depending on the performance of the domestic harvest.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2020 marketing year (January/December) is estimated at an average level of 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

It is estimated that about 1.7 million tonnes of food, out of which over 60 percent were wheat grain and flour, entered the country between January and April 2020 through seaports and land ports. The total amount is almost 25 percent lower than in the corresponding period in 2019.

### Over 24 million people in need of humanitarian assistance

Over 80 percent of the total population, about 24.3 million people, require some form of humanitarian assistance. The Food Security Cluster estimates that 20.1 million people are in need of food security and agriculture interventions from June to December 2020, out of which 10 million people are in acute need.

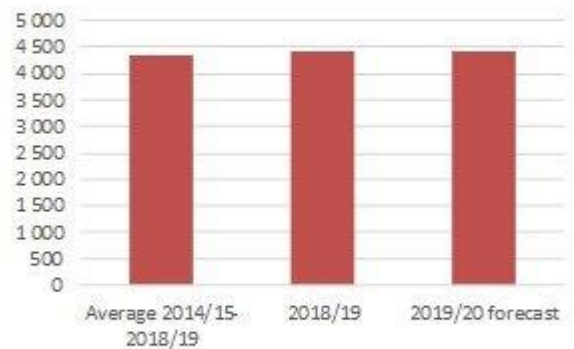
In April 2020, as households stockpiled ahead of Ramadan while facing COVID-19 containment measures, prices of most imported and locally produced goods increased compared to March 2020. Prices of sugar and cooking oil increased by almost 10 percent, while the price of rice increased by 5 percent. In many cases prices exceed their pre-crisis levels (February 2015) by two or three times. No physical shortages of goods are reported, but the high prices severely limit access. Price increases in March and April 2020, particularly for fresh fruits and vegetables, were partially attributed to increased transport costs as traders took alternative routes to avoid restrictions on movements.

Responding to the global economic slowdown, fuel prices declined in April 2020 by up to 25 percent compared to the levels of one month earlier, but remained 70 to 110 percent above the February 2015 levels, depending on the type of fuel. Prices of locally produced cooking gas increased marginally compared to the previous month, but the product in April 2020 was almost 170 percent more expensive than in February 2015.

## Yemen

### Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Floods damaged food stocks in households and markets. The damage to infrastructure hampered the internal movement of commercial and humanitarian goods. The destruction of the already weak water and sanitation infrastructure resulted in water contamination and shortages of clean potable water which, combined with standing water acting as breeding sites for mosquitos, exacerbate the spread of diseases such as cholera, malaria and dengue fever. Despite the unfavourable conditions, the incidence of cholera so far in 2020 has been much lower than in 2019. Over 112 000 suspected cholera cases with 28 deaths were reported between 1 January and 16 April 2020, less than 50 percent of the suspected cases were reported in the same period in 2019, although increases are likely.

Economic conditions remain dire. The country's already weak fiscal position has been eroded by the current low prices of oil, the depletion of hard currency reserves and the decline in remittances. After a brief period of appreciation between September and November 2019, when USD 1 was trading for YER 575, the local currency started depreciating again and exchange rates between southern and northern governorates started diverging significantly. In April 2020, 1 USD was traded for YER 661 (about 2 percent depreciation compared to March 2020) in the south, while in the north the average exchange rate remained stable at YER 600 per US dollar. Overall, in April 2020, the local currency was stronger than its lowest point value of YER 800 per US dollar (about 240 percent below its pre-crisis levels) in October 2018.

## COVID-19 and measures adopted by the Government

In March 2020, both the internationally recognized Government and the Southern Transitional Council imposed precautionary measures to prevent the spread of the virus, including closure of land borders, curfews, restrictions on movement, social distancing measures, suspension of public offices, bans on gatherings, educational activities, social and religious events. Non-essential businesses, newspapers and markets were also suspended. Neighbourhoods with higher risks of outbreaks have faced lockdowns. The Al-Wadia border crossing with Saudi Arabia was originally kept open, but it was closed on 8 April 2020. The transport of goods is allowed, but workers and vessels in the ports are subject to a 14-day quarantine.

Even before the COVID-19 pandemic, protracted conflict has tested the governance systems responsible for delivering the basic services. The continued fighting, coupled with repeated floods and high poverty rates, facilitates the transmission of the disease. About half of the health centres are deemed to be functional. There are only three virus-testing sites (Sana'a, Aden, and Al Mukalla) in the country. Due to the lack of equipment, three hospitals were reported to be closed by the Southern Transitional Council to protect healthcare personnel.

Income earning opportunities have declined due to COVID-19-related business disruptions, reduced purchasing power of those who hired workers and decreased remittance inflows from abroad. Amongst the households that were working prior to the COVID-19 crisis, it was estimated that approximately 50 percent received either no salary or lower salary than before. The amount of remittances dropped by as much as 80 percent between January and April 2020, particularly as incomes of immigrant workers in Saudi Arabia and Gulf states plummeted due to lockdowns. In 2019, remittances amounted to USD 3.8 billion, corresponding to about 13 percent of the Gross Domestic Product (GDP).

In light of the COVID-19 emergency, starting from April 2020, humanitarian partners decided to reduce the frequency of the emergency food assistance delivered to the 8.2 million people in the areas under the control of the de facto authorities. At the same time, the number of people receiving emergency livelihood support was reduced from 8 to 2.9 million. The humanitarian distribution system, that was already facing operational challenges in terms of rejected travel permits and delayed approvals, has been hampered by the COVID-19 containment measures, such as movement restrictions, curfews and the 14-day quarantine for vessels at ports, with a negative impact also on the delivery of agricultural inputs.

Flooding is likely to exacerbate the spread of the disease due to water contamination limiting the access to water, sanitation and hygiene, and crowded conditions among the displaced facilitating the transmission.

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# GIEWS Country Brief Yemen

Reference Date: 25-September-2019

## FOOD SECURITY SNAPSHOT

- Conflict continues to threaten agricultural livelihoods
- Well below average cereal harvest forecast for 2019, stable cereal import requirements
- About 24 million people estimated in need of humanitarian assistance

## Conflict continues to threaten agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities differs depending on location. In Central Highlands, with two distinct cropping seasons, harvesting of rainfed wheat, planted in July, will start in October. In Southern Uplands, with only one rainy season, the sorghum harvest just started in mid-September. In coastal areas, forage sorghum is also being harvested.

Persistent conflict continues to seriously compromise all economic activities, including agricultural livelihoods. The supply of urea, seeds and fuel is particularly scarce in Aden, Hodeidah and Al Baidha governorates, while high input prices are reported across the whole country. High fuel prices are constraining agricultural activities, particularly those related to irrigated crops, with consequent increases in the share of rainfed crops which, in turn, bear lower yields. Hired agricultural labour tends to be replaced by unskilled family labour to cope with the increased costs of production. By replacing hired labour by family labour, livelihoods of many landless rural households relying on casual labour opportunities as their main source of income are imperilled.

Outbreaks of Fall Armyworm (FAW, *Spodoptera frugiperda*), which was first detected in the country in July 2018, were reported on 2019 maize crops. While only a small maize crop, averaging about 40 000 tonnes in the past five years, is grown in Central Highlands (where it was harvested in July) and in Southern Uplands (to be harvested in October), FAW outbreaks jeopardise livelihoods. FAW, in its larval stage, feeds on a variety of crops, including maize, millet and sorghum.

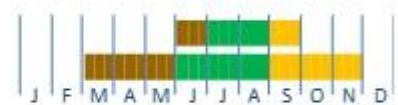
In August 2019, swarms of locusts moved in the highlands and reached the Red Sea and Gulf of Aden coasts. Unusually good rains in August 2019 allowed breeding, which extended to the Aden coastal plains but declined in the interior as conditions dried out and locusts moved to coastal areas. The country's capacity to

## Yemen

Crop Calendar

(\*major foodcrop)

Wheat\*  
Sorghum



Sowing  
Growing  
Harvesting

Source: FAO/GIEWS.

## Yemen

### Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
				percent
Sorghum	242	200	170	-15.0
Wheat	165	140	140	0.0
Millet	62	50	40	-20.0
Others	69	50	35	-30.0
<b>Total</b>	<b>538</b>	<b>440</b>	<b>385</b>	<b>-12.5</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.



control pests has been seriously eroded as vital equipment, such as four-wheel drive vehicles, has been looted.

## Well below-average cereal harvest in 2019

Taking into account conflict-related constraints as well as outbreaks of pests, total cereal production in 2019 is forecast at 385 000 tonnes, about 12 percent below the previous year's harvest and over 30 percent below the five-year average.

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on food assistance and commercial imports to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 to 10 percent, depending on the domestic harvest.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2019 marketing year (January/December) is estimated at an average level of 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

It is estimated that, between January and July 2019, about 3.8 million tonnes of food (out of which 60 percent was wheat grain and flour) entered the country through maritime seaports (Aden, Al Hodeidah, Al Salif and Al Mukalla) and land ports (Shahin and Wadiea'ah). About 95 percent of goods were imported via Aden, Al Hodeidah and Al Salif seaports. The total amount is 7 percent higher than in the corresponding period in 2018.

## Over 24 million people in need of humanitarian assistance

Nearly 80 percent of the total population, 24.1 million people, require some form of humanitarian assistance and protection.

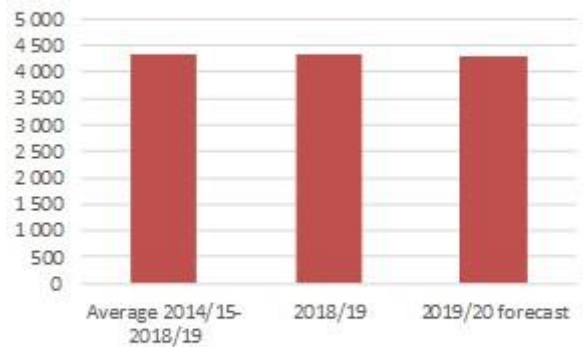
At the national level, although food retail prices are relatively stable month on month, in many cases they exceed their pre-crisis levels (February 2015) by two or three times. At the local level, prices respond to prevailing conditions. Market disruptions in Aden during the first two weeks of August resulted in severe shortages of vegetables and prices increased sharply. The increase by almost 50 percent in the official retail price of cooking gas cylinders is likely to have negative consequences on households' food security. In August 2019, the national average exchange rate was YER 585 per USD, 2 percent below the previous month, significantly stronger than its lowest point value of YER 800 per USD (about 240 percent below its pre-crisis levels) in October 2018.

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## Yemen

### Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



# GIEWS Country Brief Yemen

Reference Date: 21-December-2018

## FOOD SECURITY SNAPSHOT

- Conflict continues to threaten agricultural livelihoods
- Below-average cereal harvest estimated for 2018, stable cereal import requirements
- Almost 20 million people estimated to be food insecure in absence of assistance

## Conflict continues to threaten agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities differs greatly depending on the location. In Southern uplands, with one rainy season, the wheat and maize harvest was completed in November. In Central Highlands, with two distinct cropping seasons, planting of irrigated wheat, for harvest from March, took place in December. In coastal areas, harvesting of millet, planted in May, started in December.

Persistent conflict continues to seriously compromise all economic activities, including agricultural livelihoods. Supply of urea, seeds and fuel is particularly scarce in Aden, Hodeidah and Al Baidha governorates, while high prices are reported in all governorates. High fuel prices are constraining agricultural activities, particularly those related to irrigated crops, with consequent increases in the share of rainfed crops which, in turn, bear lower yields. In most conflict-affected areas, hired agricultural labour tends to be replaced by family labour to cope with the increased costs of production. At the same time, many rural households rely on casual labour opportunities as their main source of income. The severity of the impact varies across the country depending on the security situation.

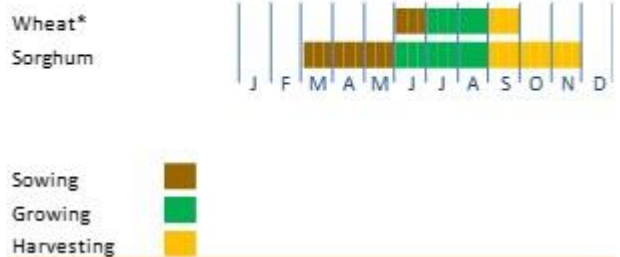
## Below-average cereal harvest in 2018

Total cereal production in 2018 is estimated at 440 000 tonnes, slightly below the previous year's conflict-affected harvest, but over 30 percent below the five-year average.

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 to 10 percent, depending on the domestic harvest.

## Yemen

Crop Calendar (\*major foodcrop)



Source: FAO/GIEWS.

## Yemen

### Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
Sorghum	319	200	200	0.0
Wheat	184	150	140	-6.7
Millet	69	50	50	0.0
Others	81	50	50	0.0
<b>Total</b>	<b>653</b>	<b>450</b>	<b>440</b>	<b>-2.2</b>

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2018 marketing year (January/December) is estimated at average 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

As of mid-November 2018, in-country food stocks are estimated at 1.1 million tonnes, including about 590 000 tonnes of wheat grain and flour, expected to cover the national requirement for nearly three months. However, it is reported that stocks of other commodities, such as sugar and vegetable oil, will cover the needs for only about six weeks. The intense fighting around Hodeida, the major entry port, that constrained imports to the country in the past months, appears to be potentially abated after an agreement on ceasefire was reached in mid-December 2018.

### Almost 20 million people estimated to be food insecure in absence of assistance

According to the Integrated Food Security Phase Classification, in the December 2018-January 2019 period, some 15.9 million people (corresponding to 53 percent of the population) are facing severe acute food insecurity (IPC Phase 3 and above), including 63 500 in Phase 5: "Catastrophe". It is estimated that, in the absence of humanitarian food assistance, about 20 million people (or 67 percent of total population) would be in need of urgent action to save lives and livelihoods. This would include about 240 000 people in Phase 5.

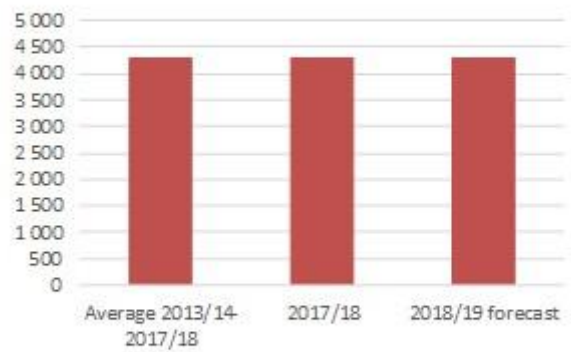
The Yemeni Riyal (YER) further weakened in October 2018, reaching its lowest level ever of YER 800 per USD, about 240 percent below its pre-crisis levels. The low value of the local currency, coupled with transportations bottlenecks and continued fighting, translates into high prices, particularly of imported goods. High food prices continue to limit the households' access to food. Significant price differences persist among markets and prices across the country are generally well above the pre-crisis levels (February 2015), in some cases multiple times.

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## Yemen

### Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.



# GIIEWS Country Brief Yemen

Reference Date: 21-June-2018

## FOOD SECURITY SNAPSHOT

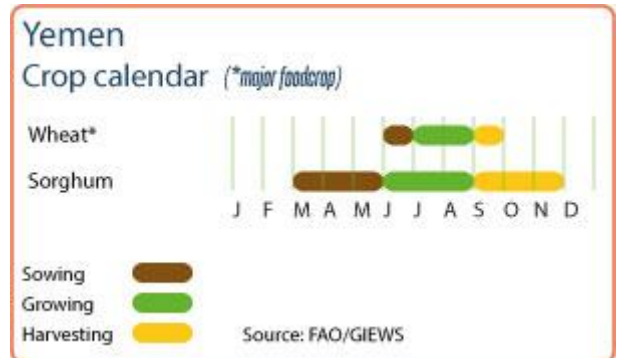
- Conflict and natural hazards endanger agricultural livelihoods
- Below-average cereal harvest estimated for 2017, stable cereal import requirements
- Almost 18 million people estimated to be food insecure

## Conflict and natural hazards endanger agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities varies greatly depending on the location. In Central Highlands, with two distinct cropping seasons, the second rainy season should start in July and wheat sowing, for harvesting from September, is about to finish. Planting of rainfed sorghum, for harvest from mid-September, started in mid-June. In Southern uplands with one rainy season, planting of wheat, for harvesting from mid-October, started in early June and will continue until mid-July. In the coastal areas, harvesting of sorghum planted in May should start in September.

In late May 2018, heavy rains from weakening cyclones fell along the southeast coastal areas from the Aden to the Oman border and eastern Yemen leading to extensive flooding and damages. Regular monitoring activities will be required to detect any locust breeding that could occur in the next three months. Cumulative precipitation in the western and central areas, which have not been affected by the cyclones, remains below average to average.

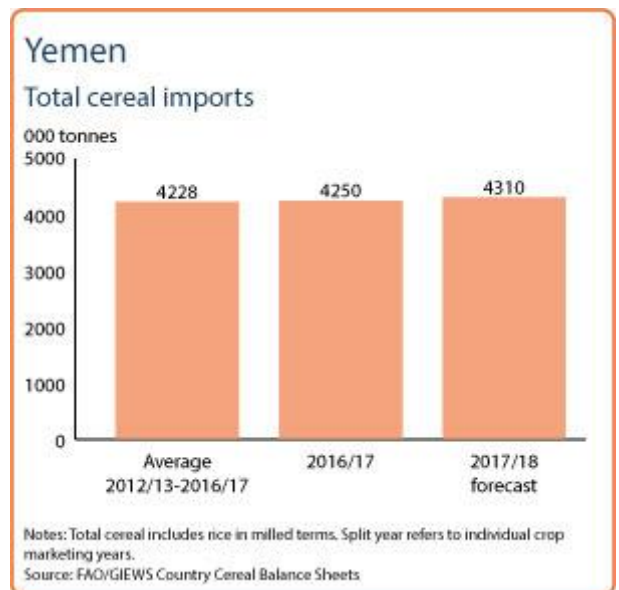
In addition, the persistent conflict continues to seriously compromise agricultural livelihoods and crop production. Shortages and high prices of agricultural inputs are reported in almost all governorates. Agricultural activities, particularly those related to irrigated crops, suffer from high fuel prices, with consequent increases in the share of rainfed crops, which in turn bear lower yields. Many rural households increasingly rely on casual labour opportunities as their main source of income. By contrast, in most conflict-affected areas, hired agricultural labour tends to be replaced by family labour in order to cope with the increased costs of production. The severity of the impact varies across the country.



Yemen  
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes		percent	
Sorghum	371	394	200	-49
Wheat	204	220	150	-32
Millet	76	87	50	-43
Others	94	91	50	-45
<b>Total</b>	<b>745</b>	<b>792</b>	<b>450</b>	<b>-43</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



## **Below-average cereal harvest and stable import requirement**

Total cereal production in 2017 is estimated at 450 000 tonnes, more than 40 percent below the previous year's harvest and the five-year average.

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 to 10 percent, depending on the domestic harvest.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2018 marketing year (January/December) is estimated at about 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

Between January and March 2018, an estimated 720 000 tonnes of wheat grains and flour as well as 100 000 tonnes of rice were imported to the country. The available import data indicate that the proportion of food imports passing through Hodeidah and Al Salif ports has declined by 11 percent compared to January-October 2017 period (FSTS-FSIS Market Bulletin Update, April 2018). It appears that, despite some improvements, the restrictions on offloading certain types of food commodities imposed on the two ports in November 2017 has not yet been fully lifted. Any disruption of trade flows threatens the continuity of market supplies and, consequently, the food security of large numbers of people. As of mid-June 2018, pro-Government forces were attempting to take over the Hodeidah, the most important seaport.

## **Almost 18 million people estimated to be food insecure**

According to the 2018 Humanitarian Needs Overview, approximately 17.8 million Yemenis are estimated to be food insecure, a 5 percent increase over the 2017 estimates. This figure includes 8.4 million people which are considered to be "severely food insecure and at risk of starvation", about 24 percent more than in 2017.

High food prices continue to limit the households' access to food. Significant price differences persist among markets and prices across the country are generally well above the pre-crisis levels (February 2015), in some cases have even doubled.

As of early 2018, there were approximately 2 million Internally-Displaced Persons (IDPs), with the highest number residing in Hajjah, Taiz, Amanat, Al Asimah and Sana'a governorates. Most IDPs are in need of urgent food assistance and they are putting strain on the host communities that are struggling to cope with the already stretched limited resources.

Between April and December 2018, the World Food Programme (WFP) intends to reach an estimated 9.8 million beneficiaries with food assistance, including cash and vouchers, as well as the restoration of livelihood programmes at a total cost of USD 2 billion. In April 2018, WFP assisted 6.8 million people.

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# GIIEWS Country Brief Yemen

Reference Date: 28-November-2017

### FOOD SECURITY SNAPSHOT

- Conflict and below average rainfall endanger agricultural livelihoods
- Below average cereal harvest forecast for 2017
- Estimated 17 million people food insecure

## Conflict and below average rainfall endanger agricultural livelihoods

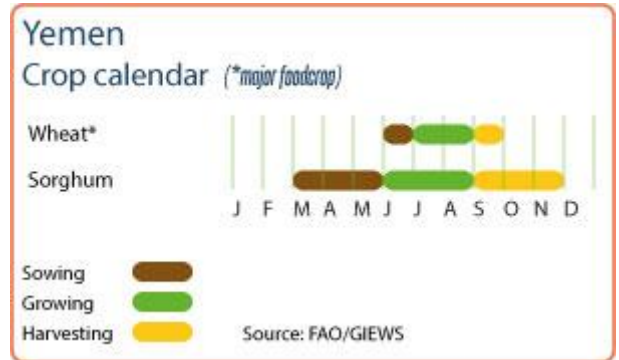
Due to a variety of natural conditions, the calendar of agricultural activities varies greatly depending on the location. In Central Highlands, the wheat harvest finished in October, while sorghum harvesting will continue until the end of November. In Southern uplands, wheat and maize harvests continue until the end of November. Millet, planted in Coastal areas in October, will be harvested from December.

Remotely sensed weather information suggests below average and poorly distributed rains in the 2017 agricultural season. In addition, the persistent conflict is seriously compromising agricultural livelihoods and production. Almost all governorates are reporting shortages and high prices of agricultural inputs. Agricultural activities, particularly those related to irrigated crops, suffer from high fuel prices, with consequent increases in the share of rainfed crops, which in turn bear lower yields. Many rural households increasingly rely on casual labour opportunities as their main source of income. By contrast, in most conflict-affected areas, hired agricultural labour tends to be replaced by family labour in order to cope with the increased costs of production. The severity of the impact varies across the country.

## Below-average cereal harvest forecast

Total cereal production in 2017 is forecast at 335 000 tonnes, about 8 percent below the previous year's harvest and about half of the five-year average. The Yemen Emergency Food Security and Nutrition Assessment (EFSNA), published in February 2017, estimates that 40 percent of all agricultural households experienced a decline in cereal production compared to the pre-crisis levels.

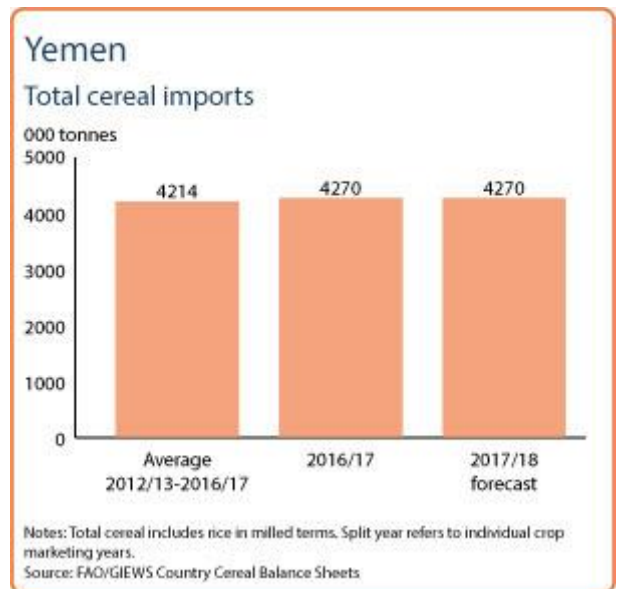
Although rainfall improved the availability of pasture and water for livestock, 45 percent of the agricultural households have reduced their herds' sizes either intentionally to cover other needs, such as health and food, or due to animal diseases. Lack of marketing channels and the absence of cold chains for produce translate



**Yemen Cereal production**

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Sorghum	325	162	150	-7
Wheat	195	96	90	-6
Millet	68	45	45	0
Others	88	60	50	-17
<b>Total</b>	<b>675</b>	<b>363</b>	<b>335</b>	<b>-8</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



into high prices in the urban areas and depressed farm-gate prices.

### Relatively stable import requirements

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 to 10 percent, depending on the domestic harvest.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2017 marketing year (January/December) is estimated at about 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice. Between January and September 2017, about 2.78 million tonnes of wheat and wheat flour were imported (FSTS-FSIS Market Bulletin Update, October 2017).

### Some 17 million people estimated to be food insecure

According to the latest Integrated Food Security Phase Classification (IPC) analysis carried out in March 2017, about 17 million people are estimated to be in IPC Phase 3: "Crisis" and IPC Phase 4: "Emergency" and require urgent humanitarian assistance. This corresponds to 60 percent of the total Yemeni population and represents a 20 percent increase compared to the last IPC analysis conducted in June 2016.

High food prices continue to limit the households' access to food. In October 2017, according to the FAO/FSIS and Food Security Technical Secretariat Market Update, the average prices of locally-produced commodities (sorghum, millet and maize) increased by 6 to 11 percent compared to September 2017, but remained up to between 46 and 63 percent above their pre-crisis (February 2015) levels. Prices of imported wheat flour increased by over 20 percent in Hajjah Governorate, the largest increase reported in October 2017, and about 90 percent above the pre-crisis levels. Large regional price differences persist reflecting significant market fragmentation.

As of September 2017, there were approximately 2 million Internally-Displaced Persons (IDPs), with the highest number residing in Hajjah, Taiz, Amanat, Al Asimah and Sana'a governorates. Most IDPs are in need of urgent food assistance and they are putting strain on the host communities that are struggling to cope with the already stretched limited resources.

The closure of maritime ports in November 2017 have disrupted the trade flows and threatened the continuity of the market supply resulting in local scarcity. The extended closure of the key ports risks a deterioration in the food security to IPC Phase 5: "Famine" in some parts of the country. A major cholera outbreak continues in the country, with more than 860 000 suspected cases by October 2017.

In October 2017, the official exchange rate of the Central Bank based in Aden was YER 380/USD, while the prevailing rate on the parallel market reached up to YER 400/USD in October 2017 and YER 420/USD in the first week of November 2017, almost double the official pre-crisis exchange rate of ER 214.9/USD. Households relying on remittances to improve their purchasing





power and report that the lack of domestic currency makes access to their remittances more difficult.

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# GIEWS Country Brief Yemen

Reference Date: 12-April-2017

### FOOD SECURITY SNAPSHOT

- Conflict endangers agricultural livelihoods despite good rainfall
- Below-average cereal harvest gathered in 2016
- Estimated 17 million people food insecure in March 2017

## Conflict endangers agricultural livelihoods despite good rainfall

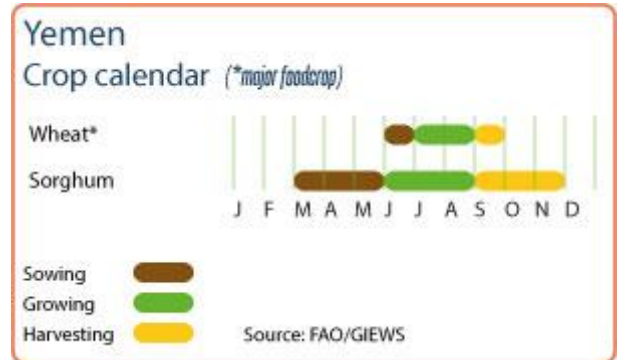
In the country, owing to a variety of natural conditions, agricultural activities vary greatly depending on the location. In Central Highlands, wheat, planted in December, is currently being harvested. Across the country, sorghum, for harvest from September, is currently being planted. Remotely-sensed NDVI suggests a favourable start of the season although in some key-producing areas such as Taiz and Sana'a, NDVI remains slightly below the levels of last year owing to above-average rainfall in 2016 but still above average.

As a result of the persistent conflict, almost all governorates are reporting shortages of agricultural inputs as well as high prices of inputs with implications for the current agriculture season. The severity of the impact varies across the country. Agricultural activities, particularly those related to irrigated crops, suffer from high fuel prices, increasing the share of rainfed crops. Many rural households rely on casual labour opportunities as a source of income. However, in most conflict situations, hired agricultural labour tends to be replaced by family labour in order to cope with the increased costs of production.

## Below-average cereal harvest gathered in 2016

Total cereal production in 2016 is estimated at 480 000 tonnes, including 220 000 tonnes of sorghum and 150 000 tonnes of wheat, about 11 percent below the previous year's harvest and 37 percent below the five-year average. Agricultural production and livelihoods were affected by the ongoing conflict as well as torrential rains which caused flash floods and landslides in July 2016. The Yemen Emergency Food Security and Nutrition Assessment (EFSNA) estimates that 40 percent of all agricultural households experienced a decline in cereal production compared to pre-crisis levels.

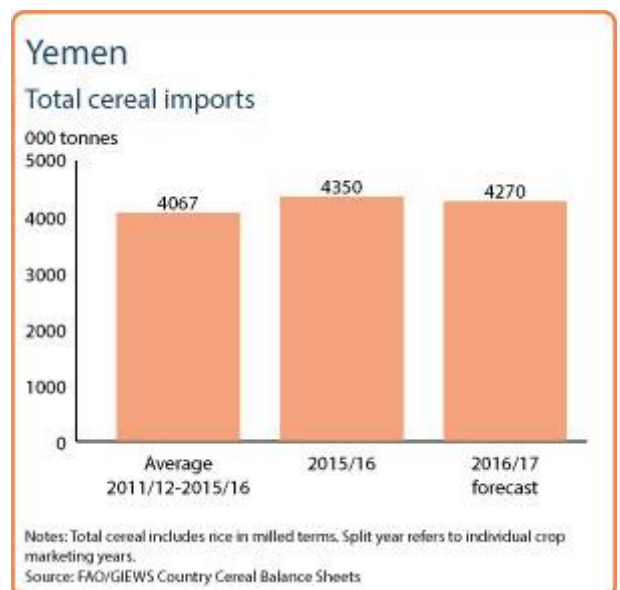
Although abundant rainfall in recent months improved the availability of pasture and water for livestock, 45 percent of the



Yemen  
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes		percent	
Sorghum	375	222	220	-1
Wheat	223	206	150	-27
Millet	74	49	50	2
Others	95	63	60	-5
<b>Total</b>	<b>766</b>	<b>540</b>	<b>480</b>	<b>-11</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets





Technical Secretariat Market update, the average prices of locally-produced commodities (sorghum, millet, and maize) were relatively stable compared to January 2017, but remained up to between 46 and 77 percent above their pre-crisis (February 2015) levels. Prices of imported wheat and wheat flour increased by about 4 percent and are over 35 percent above the pre-crisis levels. Large regional differences persist in prices reflecting significant market fragmentation.

As of February 2017, there were approximately 2 million Internally-Displaced Persons (IDPs) and 1 million IDP returnees in the country, with the highest number residing in Hajjah, Taiz, Amanat, Al Asimah and Sana'a governorates. Most IDPs and IDP returnees are in need of urgent food assistance and they are putting strain on host communities, which are struggling to cope with the already stretched limited resources.

The majority of Yemenis have little access to Government services and support. Many people do not have access to clean water and are struggling to feed themselves and their families. Basic service infrastructure is near collapse, with fewer and fewer people able to access life-saving assistance, basic health care and education. Children and women have been the hardest hit.

The official exchange rate remains stable at 250 YER/USD, while the prevailing rate on the parallel market reached 350 YER/USD in February 2017. Households relying on remittances to improve their purchasing power report that the lack of currency makes access to their remittances more difficult.

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## GIEWS Country Brief Yemen

Reference Date: 10-February-2017

### FOOD SECURITY SNAPSHOT

- Conflict endangers agricultural livelihoods despite good rainfall
- Below-average cereal harvest gathered in 2016
- Over 17 million people food insecure towards the end of 2016

### Conflict endangers agricultural livelihoods despite good rainfall

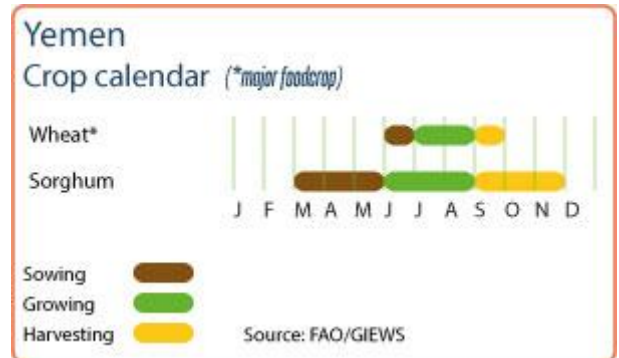
In the country, owing to a variety of natural conditions, agricultural activities vary greatly depending on the location. In Central Highlands and Southern up lands, barley, maize and sorghum harvests finished in November. In Central Highlands, second season wheat was planted in December, to be harvested from March 2017. In Eastern Plateau, wheat harvest started in January. Remotely sensed NDVI suggests satisfactory crop development owing to slightly above-average rains. In many key producing areas such as Taiz and Sana'a, rainfall from September 2016 to January 2017 was better than last year, securing sufficient soil moisture.

However, as a result of persistent conflict, almost all governorates are reporting shortage of agricultural inputs as well as high prices of inputs with implications for the current agriculture season. The severity of the impact varies across the country. Agricultural activities, particularly irrigated agriculture, suffer from high fuel prices. Many rural households rely on casual labour as a source of income. In conflict situations and to cope with increased costs of production, hired agricultural labour is usually replaced by family labour.

### Below-average cereal harvest gathered in 2016

Total 2016 cereal production is estimated at 480 000 tonnes, including 220 000 tonnes of sorghum and 150 000 tonnes of wheat, about 11 percent below previous year's harvest and 37 percent below the five-year average. Agricultural production and livelihoods were affected by the ongoing conflict as well as torrential rains resulting in flash floods and landslides in July 2016. The Yemen Emergency Food Security and Nutrition Assessment (EFSNA) estimates that 40 percent of all agricultural households experienced a decline in cereal production compared to pre-crisis levels.

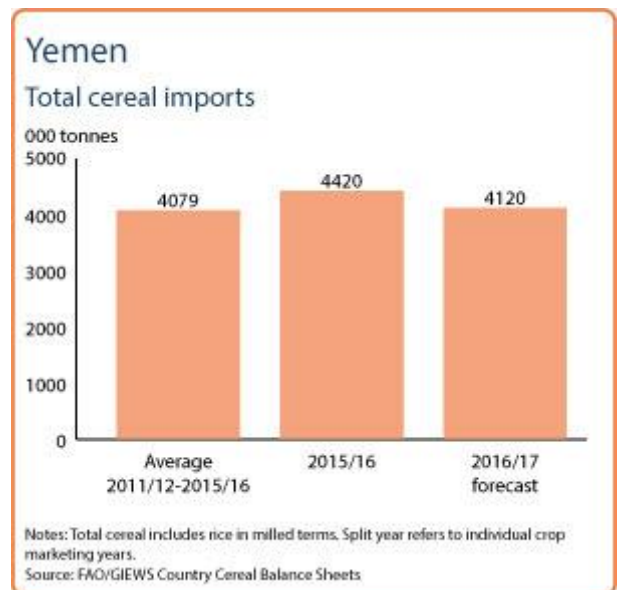
Although abundant rainfall in recent months improved availability of pasture and water for livestock, 45 percent of agricultural



Yemen  
Cereal production

	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Sorghum	375	222	220	-1
Wheat	223	206	150	-27
Millet	74	49	50	2
Others	95	63	60	-5
Total	766	540	480	-11

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



households reduced their animal numbers to cover other household needs, such as health and food, or lost animals due to diseases.

While fruit and vegetable production did not deteriorate compared to 2015, lack of marketing channels and absence of cold chain translated into high prices in the urban centers and depressed farm gate prices.

### **Relatively stable import requirements**

On average, total domestic cereal production covers less than 20 percent of total domestic cereal utilisation (food, feed and other uses). The country is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilisation in the last 10 years is between 5 to 10 percent, depending on the domestic harvest.

The import requirement for cereals to guarantee a sufficient calories intake in the 2016 marketing year (January/December) was estimated at about 4.1 million tonnes, including 3 million tonnes of wheat, 700 000 tonnes of maize and 420 000 tonnes of rice. Actual amount of imports is below the import requirement. In 2016, a total of 1 157 280 tonnes of wheat (of which 1 034 553 tonnes of wheat grain and 122 727 tonnes of wheat flour) were imported through the port of Al Hudaydah. A smaller amount of 28 952 tonnes of wheat (19 034 tonnes of wheat grains and 9 918 tonnes of wheat flour) was imported through Al Mukalla port between May and November 2016.

As of January 2017, following the crisis in the Central Bank, which led to a shutdown in trade finance and stopped wheat imports, the in-country commercial wheat grain stocks was estimated at some 940 000 tonnes (including flour), sufficient to satisfy the country's requirements for 3 months. In addition, continued fighting around the port city of Al Hudaydah, the main entry point for about 70 percent of the food import in Yemen serving the northern governorates, hinders imports.

### **Some 17 million people estimated to be food insecure towards the end of 2016**

The latest multi-agency EFSNA, using data, collected in November 2016, estimated that over 17 million people in Yemen are food insecure, with an increase of 3 million from the last available Integrated Food Security Phase Classification (IPC) from June 2016. Some 65 percent of Yemeni households are estimated to be food insecure, compared to 41 percent in the pre-crisis period (2014). Out of 17 million food insecure, about 7.3 million people are estimated to be in need of emergency food assistance.

About 75 percent of households report that the current economic situation is worse compared to the pre-crisis. The cost of living is now 40 percent higher than pre-crisis, with income levels significantly deteriorating due to disruptions in livelihoods and salaries of public employees not being paid. High food prices continue to limit household access to food. In January 2017, the average prices of locally-produced commodities (sorghum, millet, and maize) eased compared to October 2016, but remained up to between 45 and 70 percent above their pre-crisis (February 2015) levels (Food Security Technical Secretariat Market update). Prices of imported wheat and wheat flour were relatively stable, but were still some 25-30 percent above the

pre-crisis levels. Large regional price differences persist.

As of January 2017, there were approximately 2.025 million internally displaced persons (IDPs) in the country, with the highest number residing in Hajjah, Taiz, Amanat, Al Asimah and Sana'a governorates. Reports indicate that IDPs are putting strain on host communities, which are struggling to cope with already stretched limited resources.

The majority of Yemenis have little access to Government services and support. Many people do not have access to clean water and are struggling to feed themselves and their families. Water and sanitation issues had likely contributed to the cholera outbreak announced in October 2016. Basic service infrastructure is near collapse, with fewer and fewer people able to access life-saving assistance, basic health care and education. Children and women have been the hardest hit.

Official exchange rate remains stable at 250 YER/USD, while the prevailing rate on the parallel market reached 350 YER/USD in February 2017. Households relying on remittances to improve their purchasing power report that lack of currency makes access to their remittances more difficult.

Reference Date: 03-June-2016

### FOOD SECURITY SNAPSHOT

- Limited progress made towards attenuating conflict and resolving political instability
- Desert locust infestation worsens, insecurity and remoteness hampering survey and control efforts
- Over 21 million people in need of humanitarian assistance (HNO 2016)
- Economic prospects deteriorate further

The complex political dynamics and escalating conflict have resulted in a power vacuum, raising serious concerns about the political and economic stability of the country.

### Conflict and locust impacting agricultural production

In Yemen, owing to a variety of natural conditions, agricultural activities vary greatly depending on the location. Land preparations for the first season start in February/March. Planting of sorghum (the main crop for the central and southern uplands), to be harvested from September, concludes in June. Wheat, the second most important crop in the country, is also usually planted in June. The first rainy season normally lasts in both central and southern uplands from March to May. Cumulative precipitation so far in 2016 across Yemen has been close to average, with flash floods in some of the governorates.

During the first half of April, several desert locust adult groups and swarms formed in at least one area along the southern coast of Yemen. As vegetation dried out, the locusts moved into adjacent interior areas where heavy rains fell in Al Jawf, Marib, Hadhramaut, Shabwah and Al-Maharah regions. Consequently, infestations declined on the coast but increased in the interior, including an agriculturally important area of Central Highlands (Marib), the most rich and fertile zone in Yemen, typically farmed by subsistence farmers. Insecurity and remoteness hampering survey and control efforts. There remains a high risk that locust numbers will increase further. The swarms are likely to attack crops and threaten food security in the country, and may also move to other countries within the region and to other regions.

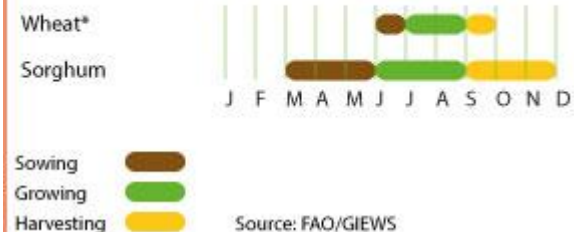
### Below-average cereal harvest in 2015 but stable import requirement

Harvesting of the 2015 main season wheat crop was concluded in September and that of sorghum in November. Total cereal production was estimated at 653 000 tonnes, including 300 000 tonnes of sorghum and 165 000 tonnes of wheat. Decreases in both cultivated land and agricultural production compared to 2014 have been reported.

Yemen is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The wheat import dependency is close to 95 percent and in the last five years, an average of 2.8 million tonnes per annum of wheat was imported annually out of a total domestic wheat utilization of about 3 million tonnes.

### Yemen

#### Crop calendar (\*major foodcrop)



### Yemen

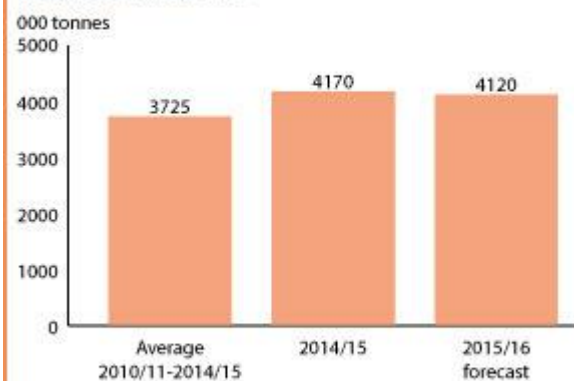
#### Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Sorghum	432	342	300	-12
Wheat	234	192	165	-14
Millet	86	74	80	8
Others	108	93	108	16
<b>Total</b>	<b>860</b>	<b>701</b>	<b>653</b>	<b>-7</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets



The import requirement for cereals in the 2016 marketing year (January/December) was estimated at about 4.1 million tonnes, including 3 million tonnes of wheat, 700 000 tonnes of maize and 420 000 tonnes of rice. As of April 2016, about 1.67 million tonnes of food were imported.

The ongoing conflict has serious impacts on food imports, transportation network and market supply, and hence on prices of both imported staples and locally-produced commodities.

### **Economic prospects deteriorate further**

The oil production in Yemen is almost stopped since the escalation of the conflict. According to a report from the Ministry of Planning and International Cooperation, the total State's public revenues declined by 54 percent due to the suspension of the production and exports of crude oil and Liquefied Natural Gas, suspension of donor support to State's budget and reduction in tax revenues.

Conflict-induced disruptions on commodity supply chains and the likely depreciation of the Yemeni Rial are expected to put upward pressure on prices, despite the prevailing low levels of international prices. The exchange rate in the parallel market, currently at 290 YER/USD reached 300 YER/USD in May 2016, compared to 214.9 YER/USD in February 2015. Increases in inflation, currently estimated at over 30 percent yearly, are expected to increase further reducing the purchasing power of a large number of the population. The Gross Domestic Product is estimated to decrease by 34.6 percent.

Moreover, millions of poor households who relied on the suspended crucial social welfare/safety net programmes, including public works and budgetary support implemented by the World Bank and the Gulf Cooperation Countries, are seriously affected.

### **Shortages of food and fuel prevail although some improvement is reported**

The fuel price fluctuation varies by governorates depending on the access and supply of fuel. Actual imports are lower than the estimated national monthly fuel requirement of Yemen of 544 000 tonnes. At the moment, shortages of fuel are reported in Sana'a and elsewhere. The price has reached to YER 10 000 per 20 litre gallon in Taiz and YER 7 000 in Sana'a.

Fuel shortages are severely hampering everyday activities, including the delivery of commercial supplies of food and other essentials, humanitarian aid and medicines to the vulnerable, conflict-affected population. The operation of water pumps for domestic water supply, cooling, sanitation and irrigation for agriculture is also affected, particularly in the coastal areas.

In April 2016, the average prices of locally-produced commodities (sorghum, millet, and maize) were stable but over 70 percent above their pre-crisis (February 2015) levels. Prices of imported wheat and wheat flour also stabilized but were still 11 and 15 percent, respectively, above the pre-crisis levels.

### **Over 21 million people in need of humanitarian assistance**

The humanitarian situation has sharply deteriorated not only at urban centres where the conflict is more intense but also in the rural areas, and this is affecting agricultural livelihoods.

Around 21.2 million people, 82 percent of the population, require some kind of humanitarian assistance to meet their basic needs or protect their fundamental rights. An estimated 14.4 million are food insecure (including 7.6 million severely food insecure), 19.3 million lack adequate access to clean water or sanitation and nearly 320 000 children have severe acute malnutrition. With the rapid escalation of the conflict and insecurity, the disruption of markets, employment opportunities and rural livelihoods, the food security situation continues to deteriorate significantly. Humanitarian assistance has been seriously constrained by the lack of access and shortages of fuel, as well as the challenging security situation.

Political instability exacerbated by ongoing conflict in the north and south of the country, means that millions of Yemenis have little access to Government services and support. Many people do not have access to clean water and are struggling to feed themselves and their families. Basic service infrastructure is near collapse; with fewer and fewer people able to access life-saving assistance, basic health care and education. Children and women have been the hardest hit.

Reference Date: 23-June-2015

### FOOD SECURITY SNAPSHOT

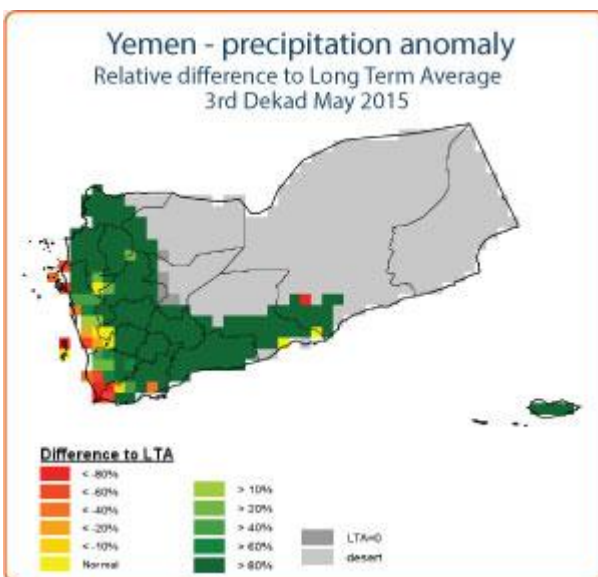
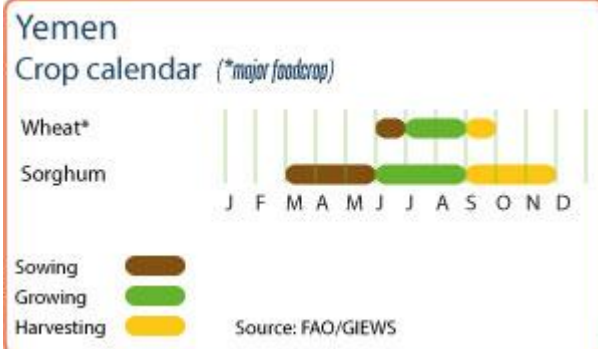
- Limited progress made towards attenuating conflict and resolving political instability since last FAO Special Alert on 15 April 2015
- IPC indicative analysis from June 2015 estimated about 12.9 million to be in need of urgent life-saving and livelihood assistance
- Start of 2015 main cropping season in April coincided with escalation of conflict thus compromising outcome
- Extreme fuel shortages are hampering day-to-day activities, including delivery of humanitarian, food and medical assistance. WFP emergency food distribution was disrupted in end-April due to severe fuel shortages until WFP chartered ship delivered fuel to Yemen on 10 May 2015
- Depending on the markets, food prices have risen sharply in the last few months by 40-100 percent compared to February 2015
- Farm gate prices in some areas are very low owing to reduced demand from traders, damaged infrastructure and lack of fuel thus negatively affecting farmers' income
- WFP aims to scale up its emergency response to reach 2.5 million conflict-affected people between May and July

The Shifting political dynamics and escalating conflict have resulted in a power vacuum that brought fresh concerns about the political and economic stability of the country.

### Current cropping season in jeopardy

In Yemen, owing to a variety of natural conditions, agricultural activities vary greatly depending on the location. According to the seasonal calendar, land preparation for the first season starts in February/March. Planting of sorghum (the main crop for the central and southern uplands), to be harvested from September, concluded in June. Wheat, the second most important crop in the country, is usually planted in June. The first rainy season normally starts in both central and southern uplands in March, but the late onset of the rains particularly in the central zone delayed cultivation of cereal and fodder crops. Although rainfall improved as the season progressed, in some areas along the coast it remains below the long-term average.

Farmers are being squeezed by high input costs and low output prices. Some governorates are heavily affected by the conflict (such as Sa'ada, Lahaj, Taiz, Al-Dhale'e and Abyan) and there is significant damage to crop production farms and storage and irrigation facilities. These and the shortage of fuel have seriously affected the production and harvest of irrigated crops, including fruits and vegetables. Marketing of fruits and vegetables is severely affected due to fuel shortages to transport to consumers. Owing to the lack of marketing channels and available refrigeration, producer prices of vegetables and fruits at the farm gate decreased about 5-10 times compared to pre-conflict levels.



**Yemen Cereal production**

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes			percent
Sorghum	426	439	342	-22
Wheat	240	233	192	-18
Millet	83	83	74	-11
Others	105	109	93	-15
<b>Total</b>	<b>855</b>	<b>864</b>	<b>701</b>	<b>-19</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Shortage of fuel continues affecting also livestock and poultry production preventing transport to the markets and limiting the flow of traders to rural areas. In the main production areas of Tihamah, the price of live animals halved on average. Vaccines are no longer available. Local reports from mid-May indicate that the price of eggs at the farm gate decreased from YER 7 800 to YER 3 800 for a 12-pack carton (each pack contains 30 eggs). To limit their losses, farmers started selling their laying hen flocks, particularly those aged 50 weeks and more. A laying hen currently sells for an average of YER 150. Due to excess supply of hens, some farmers are reported to simply release the flocks for the public with distress prices. The price of one-day old chicks decreased from YER 140 to YER 20. Acute shortages of fuel and electricity halted animal feed production, which coupled with the lack of imports resulted in market shortages. Responding to higher prices, farmers halved the use of compound feed and consequently reduced egg production by 30-40 percent. Packing materials are also reported to have increased in price.

Coupled with insecurity and damages to agricultural infrastructure and machinery, shortages and soaring fuel prices are affecting day-to-day farm operations at the time of major and crucial agricultural activities such as planting and harvesting.

### **Below-average cereal harvest in 2014 result in slightly increased import requirement**

Harvesting of the 2014 main season wheat crop was concluded in September and that of sorghum in November. Total cereal production was estimated at 700 000 tonnes of cereals, including 342 000 tonnes of sorghum and 192 000 tonnes of wheat.

Yemen is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The wheat import dependency is about 95 percent and in the last five years, an average of 2.8 million tonnes per annum of wheat was imported annually out of a total domestic wheat utilization of about 3 million tonnes.

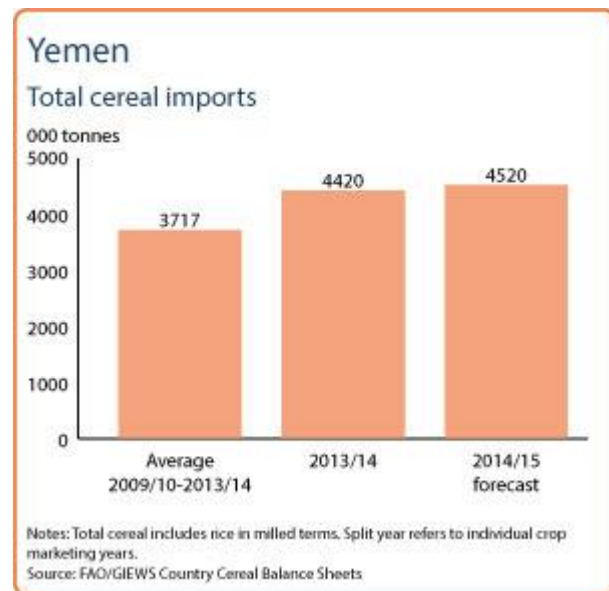
The import requirement for cereals in the 2014 marketing year (January/December) was estimated at about 4.5 million tonnes, including 3 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice. This compares with 4.4 million tonnes of cereals imported in 2013.

The ongoing conflict has serious impacts on food imports, transportation network and market supply, and hence on prices of both imported staples and locally-produced commodities.

### **Economic prospects deteriorate further**

Oil revenue has been declining owing to reduced production and low international prices. In addition, several countries and international organizations in the region suspended financial support and aid to the Government. Consequently, the already declining foreign exchange reserves (standing at USD 4.7 billion at the end of 2014, about half of their peak levels in 2008) are expected to decline further. Maintaining current levels of subsidies and salaries in the public sector remains uncertain.

Conflict-induced disruptions on commodity supply chains and the likely depreciation of the Yemeni Riyal are expected to put upward pressure



on prices, despite the prevailing low levels of international prices. In November 2014, the national annual inflation rate stood at 9.5 percent, up from 5.8 percent in May 2014, its lowest level since December 2012. Increases in inflation, especially food inflation, are expected to increase further reducing the purchasing power of a large number of the population. Moreover, millions of poor households who relied on the suspended crucial social welfare/safety net programmes, including public works and budgetary support implemented by the World Bank and the Gulf Cooperation Countries (GCC), would be seriously affected.

## **Shortages of food and fuel reported**

Extreme fuel shortages are severely hampering everyday activities, including the delivery of commercial supplies of food and other essentials, humanitarian aid and medicines to the vulnerable, conflict-affected population. The operation of water pumps for domestic water supply, sanitation and irrigation for agriculture is also affected.

At the end of April, the WFP emergency food distribution came to a halt due to severe fuel shortages until a WFP-chartered ship delivered fuel to Yemen to service humanitarian operations on 10 May 2015. Cooking gas, petrol and diesel are only sporadically available on the markets at very high prices. The highest prices of fuel in the first week of June 2015 were reported in Rayma, with YER 2 000 per litre of petrol, about a ten-fold increase compared to the pre-crisis period. In the first week of June alone fuel price increased by 23 percent on average, compared to the previous month (when prices were already between 7 to 10 times the pre-crisis level).

Although in May 2015, the average nominal retail price of wheat flour decreased by 11 percent to YER 182 per kg, the price remained 32 percent above the pre-crisis period of February 2015. In the first week of June, wheat flour was not available in Abyan, Aden, and Lahaj, and only sporadically available in many others. The largest market shortages are reported from Aden where sugar and vegetable oil are sporadically available, while wheat flour, beans, onions and fuel are not available.

## **Nearly 13 million people in need of urgent life-saving and livelihood assistance**

During the last several months the humanitarian situation has sharply deteriorated not only at urban centres where the conflict is more intense but also in the rural areas, and this is affecting agricultural livelihoods.

The Integrated Food Security Phase Classification (IPC) indicative analysis released in June 2015 by FAO, WFP, Government and other partners, classified 10 (out of 22) governorates (Saa'da, Aden, Abyan, Shabwa, Hajjah, Hodeidah, Taiz, Lahj, Al Dhale'e and Al Baida) as facing a food insecurity "Emergency" (IPC Phase 4), all affected by the ongoing armed conflict. Nine governorates were classified as facing a food security "Crisis" or IPC Phase 3: Amran, Dhamar, Sana'a, Sana'a city, Ibb, Mareb, Rayma, Al Mahweet, Al Jawf. Of the 12.9 million food insecure people across the country, about 6.1 million were in Emergency Phase, while 6.8 million were in Crisis Phase. The level of food insecurity increased by 21 percent compared to the previous year. With the rapid escalation of the conflict and insecurity, the disruption of markets, employment opportunities and rural livelihoods, the food security situation is expected to deteriorate further.

Political instability exacerbated by ongoing conflict in the north and south of the country, means that millions of Yemenis have little access to Government services and support. Many people do not have access to clean water and are struggling to feed themselves and their families. Basic service infrastructure is near collapse; with fewer and fewer people able to access life-saving assistance, basic health care and education. Children and women have been the hardest hit.

WFP responded to the emergency humanitarian needs through unconditional and conditional food assistance and cash transfers to the affected populations. The WFP aims to scale up its emergency response to reach 2.5 million conflict-affected people between May and July. Urgent mobilization of resources is needed for safety nets. Airstrikes have repeatedly damaged the airports in Sana'a and Hodeidah, hampering direct emergency relief from abroad.

As part of the flash appeal, FAO designed a project on emergency livelihood support to conflict affected displaced, host families and food-insecure beneficiaries. The intervention covers animal health, animal feed, seeds, tools and solar pumps. The intervention on livelihood-specific and seasonally appropriate inputs provided, food production capacity and availability protected in "crisis" and "stressed" households. Moreover, the intervention will cover livestock vaccination of 1.5 million animals and treatment services provided to farmers and agro-pastoralists' households in seven governorates and 24 districts.

Reference Date: 15-May-2015

### FOOD SECURITY SNAPSHOT

- Limited progress made towards attenuating conflict and resolving political instability since last FAO Special Alert on 15 April 2015
- Across the country, an estimated 16 million people (more than 60 percent of population) are in need of humanitarian assistance with more than 300 000 people displaced as a result of current conflict (OCHA)
- Start of 2015 main cropping season in April coincided with escalation of conflict thus compromising outcome
- Extreme fuel shortages are hampering day-to-day activities, including delivery of humanitarian food and medical assistance. WFP emergency food distribution was disrupted in end-April due to severe fuel shortages until WFP chartered ship delivered fuel to Yemen on 10 May 2015
- Food prices have risen sharply in last few months, with staple wheat grain and wheat flour prices increasing by about 42 and 44 percent in April compared to February
- Farm gate prices in some areas are very low owing to damaged infrastructure and lack of fuel thus negatively affecting farmers income
- WFP aims to scale up its emergency response to reach 2.5 million conflict-affected people between May and July
- FAO, together with partners, is preparing to carry out an assessment to update the Integrated Phase Classification (IPC) for Food security

Shifting political dynamics and escalating conflict resulted in a power vacuum that brought fresh concerns about the political and economic stability of the country.

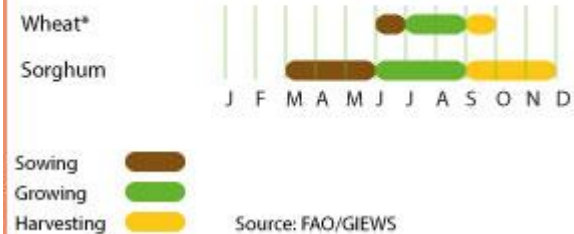
### Current cropping season in jeopardy

According to the seasonal calendar, land preparation for the first season starts in February/March. Sorghum (the main crop for the central and southern uplands) planting lasts from mid-April to June. The first rainy season normally starts in both central and southern uplands in March, but the late onset of the rains particularly in the central zone delayed cultivation of cereal and fodder crops. Although rainfall improved in the first decade of May, areas along the coast remain below the long-term average.

Farmers are being squeezed by high input costs and low output prices. Some governorates are heavily affected by the conflict (such as Sa'ada, Lahaj, Taiz, Aden and Abyan) many of the crop production farms, storage facilities and water pumps were destroyed affecting the harvest of irrigated crops, including fruits and vegetables. Marketing of fruits and vegetables is severely affected due to fuel shortages to transport to consumers. Owing to the lack of marketing channels and available refrigeration, producer prices of vegetables and fruits at the farm gate decreased about 5-10 times compared to pre-conflict levels.

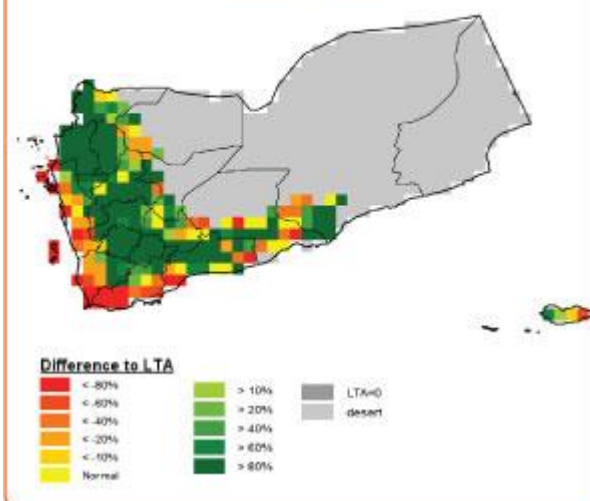
### Yemen

#### Crop calendar (\*major foodcrop)



### Yemen - precipitation anomaly

Relative difference to Long Term Average  
1st Dekad May 2015



### Yemen

#### Cereal production

	2009-2013	2013	2014	change
	average			
000 tonnes				
Sorghum	426	439	342	-22
Wheat	240	233	192	-18
Millet	83	83	74	-11
Others	105	109	93	-15
<b>Total</b>	<b>855</b>	<b>864</b>	<b>701</b>	<b>-19</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Shortage of fuels continues affecting also livestock and poultry production preventing transport to the markets and limits the flow of urban shoppers to rural areas. In the main production areas of Tihamah, the price of live animals halved on average. Vaccines are no longer available. The price of eggs at the farm gate decreased from YER 7 800 to YER 3 800 for a 12-pack carton (each pack contains 30 eggs). To limit their losses, farmers started selling their laying hen flocks, particularly those aged 50 weeks and more. A laying hen currently sells for an average of YER 150. Due to excess supply of hens, some farmers are reported to simply release the flocks for the public with distress prices. The price of one-day old chicks decreased from YER 140 YR to YER 20. Acute shortages of fuel and electricity halted animal feed production, which coupled with the lack of imports resulted in market shortages. Responding to higher price, farmers halved the use of compound feed, and consequently reduced egg production by 30 to 40 percent. Packing materials are also reported to have increased in price.

Coupled with insecurity and damages to agricultural infrastructure and machinery, shortage and soaring fuel prices are affecting day-to-day farm operations at the time of major and crucial agricultural activities such as planting and harvesting.

### **Below-average cereal harvest in 2014 result in slightly increased import requirement**

Harvesting of the 2014 main season wheat crop was concluded in September and that of sorghum in November. Total cereal production was estimated at 700 000 tonnes of cereals, including 342 000 tonnes of sorghum and 192 000 tonnes of wheat.

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The wheat import dependency is about 95 percent and in the last five years, an average of 2.8 million tonnes per annum of wheat was imported annually out of a total domestic wheat utilization of about 3 million tonnes.

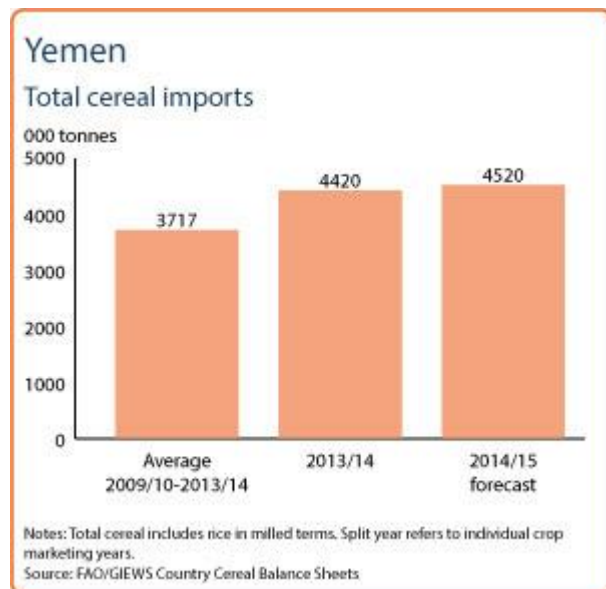
The import requirement for cereals in the 2014 marketing year (January/December) was estimated at about 4.5 million tonnes, including 3 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice. This compares with 4.4 million tonnes of cereals imported in 2013.

The ongoing conflict has serious impacts on food imports, transportation network and market supply, and hence on prices of both imported staples and locally-produced commodities.

### **Economic prospects deteriorate further**

Oil revenue has been declining owing to reduced production and low international prices. In addition, several countries and international organizations in the region suspended financial support and aid to the Government. Consequently, the already declining foreign exchange reserves (standing at USD 4.7 billion at the end of 2014, about half of their peak levels in 2008) are expected to decline further. Maintaining current levels of subsidies and salaries in the public sector remains uncertain.

Conflict-induced disruptions on commodity supply chains and the likely depreciation of the Yemeni Riyal (YER) are expected to put an upward pressure on prices, despite the prevailing low levels of international





prices. In November 2014, the national annual inflation rate stood at 9.5 percent, up from 5.8 percent in May 2014, its lowest level since December 2012. Increases in inflation, especially food inflation, are expected to increase further reducing the purchasing power of a large number of the population. Moreover, millions of poor households who relied on the suspended crucial social welfare/safety net programmes, including public works and budgetary support implemented by the World Bank and the Gulf Cooperation Countries (GCC), would be seriously affected.

## **Shortages of food and fuel reported**

Extreme fuel shortages are severely hampering everyday activities, including the delivery of humanitarian aid and medicines to the vulnerable, conflict-affected population. The running of water pumps for sanitation and agriculture is also affected.

At the end of April, the WFP emergency food distribution came to a halt due to severe fuel shortages until a WFP-chartered ship delivered fuel to Yemen to service humanitarian operations on 10 May 2015. Cooking gas, petrol and diesel are only sporadically available on the markets fetching premium prices. Highest prices of fuel in the first week of May 2015 were reported in Aden, with YER 1 000 per litre of petrol, about a five-fold increase compared to the pre-crisis period.

In April 2015, the average nominal retail price of wheat grain was YER 176 per kg, while that of wheat flour was YER 198 per kg which have increased by 23.7 percent and 28.1 percent, respectively, from March 2015 (and by 41.8 percent and 44.4 percent from February 2015). Wheat flour is not available in almost all markets of the most affected governorates, including in Aden, Lahaj, Ad Daleh, Sa'ada, Taiz, and Sana'a. Onions, beans and sugar are reported to be sporadically available in Aden, Hajjah and Sa'ada.

## **Nearly 16 million people in need of humanitarian assistance**

During the last several weeks the humanitarian situation has sharply deteriorated not only at urban centres where the conflict is taking place but also at the rural areas affecting agricultural livelihoods.

After decades of chronic under-development and socio-economic crisis, 15.9 million people, over 60 percent of the population, are now estimated to be in need of humanitarian assistance. Children and women have been the hardest hit. Political instability, exacerbated by ongoing conflict in the north and south of the country, means that millions of Yemenis have little access to Government services and support. Many people do not have access to clean water and are struggling to feed themselves and their families. Basic service infrastructure is near collapse; with fewer and fewer people able to access life-saving assistance, basic health care and education.

The Integrated Food Security Phase Classification (IPC) analysis conducted in September 2014 by FAO, WFP, Government and other partners, classified five governorates (Hajjah, Sa'ada, Shabwa, Abyan and Lahaj) as facing a food insecurity emergency (IPC Phase 4). Twelve governorates were classified as facing a food security "Crisis" or IPC Phase 3, Hodeidah, Rayma, Al Dhale, Al Beyda, Ibb, Taiz, AlMahweet, Sana'a (rural), Mareb, Dhamar, Amran and Aljawf. Of the 10.6 million food insecure people across the country, about 4.8 million were in Emergency Phase, while 5.8 million were in Crisis Phase. With the rapid escalation of the conflict and insecurity, the disruption of

markets, employment opportunities and rural livelihoods, the food security situation is expected to deteriorate significantly. FAO, together with partners, is organizing IPC analysis with the National Technical Working Group (NTWG) and the report is expected to be finalized during the first week of June 2015.

WFP responded to the emergency humanitarian needs through unconditional and conditional food assistance and cash transfers to the affected populations. The WFP aims to scale up its emergency response to reach 2.5 million conflict-affected people between May and July. Urgent mobilization of resources is needed for safety nets. Airstrikes have repeatedly damaged the airports in Sana'a and Hodeidah, hampering direct emergency relief from abroad.

As part of the flash appeal, FAO designed a project on emergency livelihood support to conflict affected displaced, host families and food-insecure beneficiaries. The intervention covers on animal health, animal feed, seeds, tools and solar pumps. The intervention on livelihood-specific and seasonally appropriate inputs provided, food production capacity and availability protected in 'crisis' and 'stressed' households. Moreover, the intervention will cover livestock vaccination of 1.5 million animals and treatment services provided to farmers and agro-pastoralists' households in seven governorates and 24 districts.

Reference Date: 24-April-2015

### FOOD SECURITY SNAPSHOT

- **Conflict escalation and displacements resulted in serious disruptions in market, trade and livelihood activities, exacerbating already precarious food insecurity situation in the country**
- **2015 cropping season has coincided with escalation of conflict thus compromising outcome**
- **More than half of Yemen's population (61 percent out of 25.9 million people) is estimated in need of humanitarian assistance**

Shifting political dynamics and escalating conflict resulted in a power vacuum that brought fresh concerns about the political and economic stability of the country.

### Current cropping season in jeopardy

Sorghum, the most important crop in terms of quantity produced domestically, is normally planted in the Eastern plateau from late March; followed by the Southern uplands from early April and Central Highlands and Coastal areas from mid-April. Wheat is the second most produced crop in the country and the harvest of winter wheat in the Eastern plateau normally concludes in February, while that of the second season in the Central Highlands continues into October. Large farms in the region with access to irrigation grow fruits and vegetables, while small farmers often rely on rainfed maize, barley and sorghum.

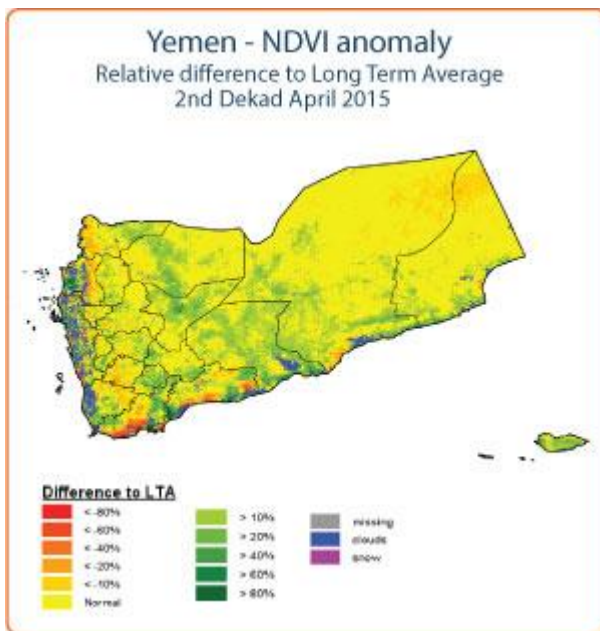
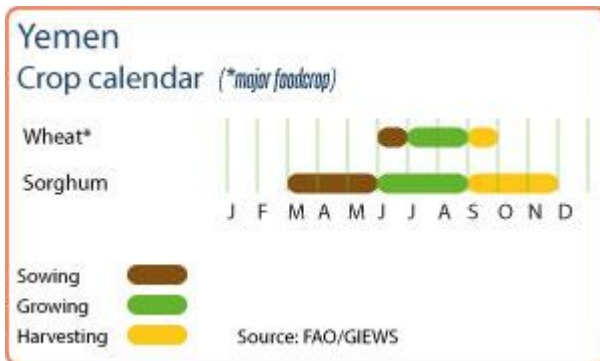
Remotely-sensed data reveals that most of the country received below-average rainfall so far although patterns of erratic rainfall are not unusual in Yemen. However, owing to irrigation and supplementary irrigation, vegetation response captured by the satellite image-based Normalized Difference Vegetation Index (NDVI) shows that the vegetation condition in some coastal areas is below normal/poor while the rest of the country is either average or above average (as shown by the NDVI map).

Although no information is yet available, continued instability is expected to heavily impact on agricultural production and marketing. This would in turn impact negatively on food availability, thus increasing the already high levels of import and assistance requirements.

### Below-average cereal harvest in 2014 result in slightly increased import requirement

Harvesting of the 2014 main season wheat crop was concluded in September and that of sorghum in November. Total cereal production was estimated at 700 000 tonnes of cereals, including 342 000 tonnes of sorghum and 192 000 tonnes of wheat.

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The wheat import dependency is about 95 percent and in the last five years, an average of 2.8 million tonnes per annum of wheat was imported annually out of a total domestic wheat utilization of about 3 million tonnes.



**Yemen Cereal production**

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Sorghum	426	439	342	-22
Wheat	240	233	192	-18
Millet	83	83	74	-11
Others	105	109	93	-15
<b>Total</b>	<b>855</b>	<b>864</b>	<b>701</b>	<b>-19</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

The import requirement for cereals in the 2014 marketing year (January/December) was estimated at about 4.4 million tonnes, including 3 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice. This compares with 4.2 million tonnes of cereals imported in 2013.

The ongoing conflict will likely have serious impacts on food imports, transportation network and market supply, and hence on prices of both imported staples and locally-produced commodities. Trade reports indicate that owing to political instability, rice shipments from Pakistan have been suspended, with arrivals from India also likely to be affected. Reports indicate that food stocks in the country are sufficient for six months, although continued conflict hinders movements and supplies to the markets.

## Economic prospects deteriorate further

Oil revenue has been declining owing to reduced production and low international prices. In addition, several countries and international organizations in the region suspended financial support and aid to the Government. Consequently, already declining foreign exchange reserves (standing at USD 4.7 billion at the end of 2014, about half of their peak levels in 2008) are expected to decline further. Maintaining current levels of subsidies and salaries in the public sector remains uncertain.

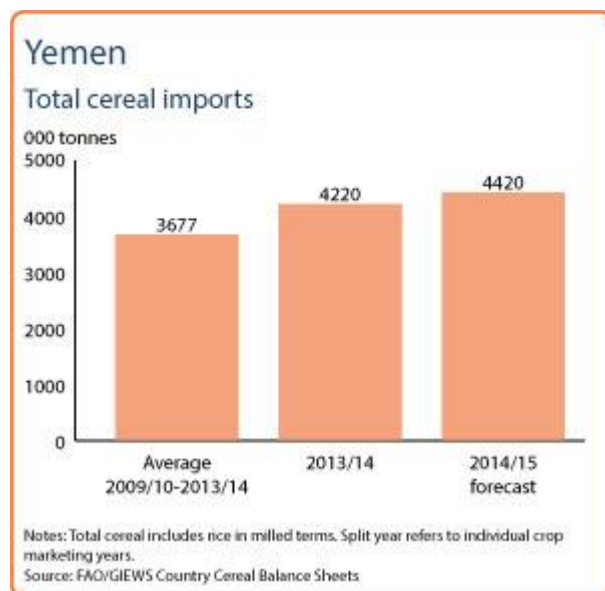
Conflict-induced disruptions on commodity supply chains and the likely depreciation of the Yemeni Riyal (YER) are expected to put an upward pressure on prices, despite the prevailing low levels of international prices. In November 2014, the national annual inflation rate stood at 9.5 percent, up from 5.8 percent in May 2014, its lowest level since December 2012. Increases in inflation, especially food inflation, are expected to increase further reducing the purchasing power of a large number of the population. Moreover, millions of poor households who relied on the suspended crucial social welfare/safety net programmes, including public works and budgetary support implemented by the World Bank and the Gulf Cooperation Countries (GCC), would be seriously affected.

## Food and fuel prices increase

The ongoing conflict is reported to have restricted the flow of commodities in some governorates like Al Bayda and Shabwa. In addition, restricted movements in the border areas with the Kingdom of Saudi Arabia curbed the flow of people and goods to and from Sa'ada and Hajja.

Since the latest escalation of the conflict in March 2015, food and fuel prices began to increase. In April 2015, the average domestic retail prices of wheat grain and wheat flour increased by 42 and 44 percent, respectively, compared with February 2015. Reports indicate that in Hodeidah food prices doubled and fuel prices quadrupled. Most of the shops in the high-conflict areas in Aden and Al Dhale remain closed.

Continuous disruptions in electric power supply and severe shortage or absence of fuel and cooking gas were reported. The supply of food items from wholesalers has also become limited resulting in rationing. Available food stocks are running out as replenishments get scarcer. The worst affected areas are reported to be the southern cities of Aden, Albayda, Shabwa, Lahaj, Ibb and Haidramout due mainly to the fierce fighting between rival groups.



## Nearly 16 million people in need of humanitarian assistance

After decades of chronic under-development and socio-economic crisis, 15.9 million people, over 60 percent of the population, are now estimated to be in need of humanitarian assistance. Children and women have been hardest hit. Political instability, exacerbated by ongoing conflict in the north and south of the country, means millions of Yemenis have little access to Government services and support. Many people do not have access to clean water and are struggling to feed themselves and their families. Basic service infrastructure is near collapse; with fewer and fewer people able to access life-saving assistance, basic health care and education.

The Integrated Food Security Phase Classification (IPC) analysis conducted in September 2014 by FAO, WFP, Government and other partners, classified five governorates (Hajjah, Sa'ada, Shabwa, Abyan and Lahaj) as facing a food insecurity emergency (IPC Phase 4). Twelve governorates were classified as facing a food security "Crisis" or IPC Phase 3, Hodeidah, Rayma, Al Dhale, Al Beyda, Ibb, Taiz, AlMahweet, Sana'a (rural), Mareb, Dhamar, Amran and Aljawf. Of the 10.6 million food insecure people across the country, about 4.8 million were in Emergency Phase, while 5.8 million were in Crisis Phase. With the rapid escalation of the conflict and insecurity, the food security situation is expected to deteriorate significantly.

A WFP Operation shifting from relief assistance to recovery and resilience to promote food and nutrition security replaced the previous Emergency Operation. Between 1 July 2014 and 30 June 2016, it will assist many of Yemen's severely food-insecure people through unconditional household food or cash distributions, conditional participatory food assistance activities, nutritional support for the treatment and prevention of acute and chronic malnutrition and micro-nutrient deficiencies, and meals and take-home rations for school children to improve attendance, nutrition and learning. At the same time, WFP responds to the emergency humanitarian needs through unconditional and conditional food assistance and cash transfers to the affected populations. Urgent mobilization of resources is needed for safety nets.

Even before the current escalation of the conflict, Yemen was in dire need of support to strengthen the agricultural sector. In such a challenging environment, FAO and partners have sought to diversify and strengthen rural livelihoods by distributing crop production packages, home gardening kits and fishery inputs. Vaccinated poultry and goats for backyard livestock production were also provided. With the deterioration of the security situation FAO is gearing-up to redouble its effort to ensure that as many farmers as possible are able to plant this cropping season and strengthen their ability to withstand future shocks. Increased funding is therefore required to facilitate the implementation of these activities.

Reference Date: 09-February-2015

### FOOD SECURITY SNAPSHOT

- Conflict escalation and recent vacuum of power brought fresh concerns about food security prospects
- Average cereal crop gathered in 2014
- Retail prices of wheat stable in recent months
- Food insecurity decreased from 45 percent in 2011 to over 40 percent in 2014, leaving absolute number of food insecure unchanged

Continuously shifting power dynamics resulting in conflict escalation and the recent vacuum of power after the resignation of the President brought fresh concerns about the political stability and food security prospects in the country stricken by widespread poverty.

Depending on the region, land preparation is currently underway for the 2015 crop: maize in Central Highlands, sorghum in Southern up lands and Eastern Plateau. Reports indicate normal meteorological conditions, as well as normal availability of inputs. Vegetation response captured by Normalized Difference Vegetation Index using satellite images suggests average to above-average pasture conditions (as shown by the NDVI map on the right).

### Average cereal crop gathered in 2014

Harvesting of the 2014 main season wheat crop was concluded in September and that of sorghum in November. Although locally in some areas of the country a below-average crop production due to uneven rainfall was gathered, an average total cereal production was harvested. Accordingly, total cereal is put at 860 000 tonnes, including 430 000 tonnes of sorghum and 240 000 tonnes of wheat.

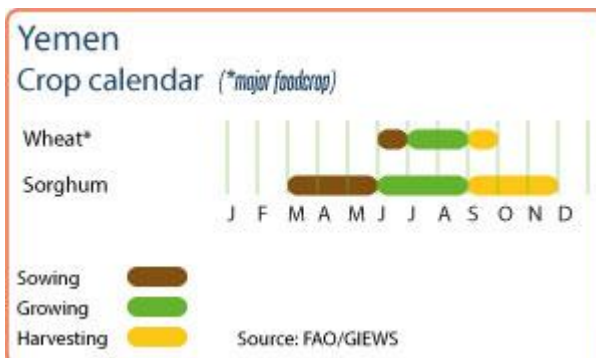
### Slightly decreased import requirements

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent and in the last five years, an average of 2.8 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 3 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for cereals in the 2014 marketing year (January/December) is estimated at about 4.1 million tonnes, about the same as in 2013. Most of the imports is wheat (almost 3 million tonnes), followed by some 700 000 tonnes of maize and 400 000 tonnes of rice.

### Retail prices of wheat stable in recent months

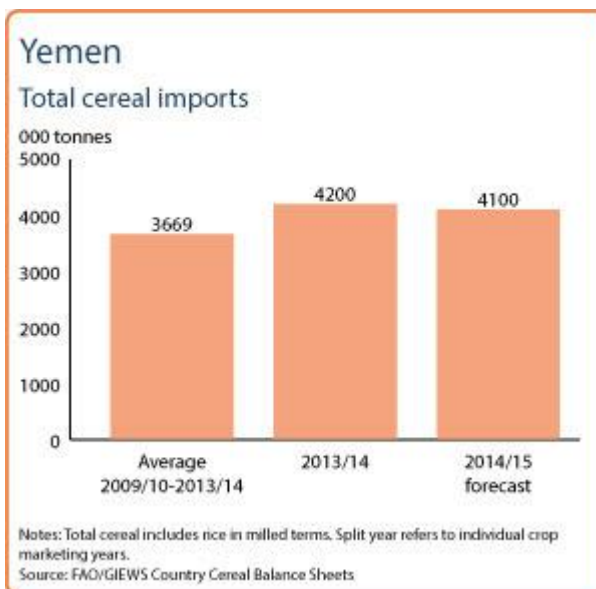
Average retail prices of wheat and wheat flour in specific markets are generally stable on monthly basis with seasonal variations. Large regional differences in retail prices exist depending on quality variation, transportation costs and distance of the entry ports. The highest prices are generally reported in Sa'ada (YER 135 per kg of wheat in December 2014, YER 145 per kg of flour), while the lowest can be found in Amram (YER 110 per kg of wheat and YER 130 per kg of



### Yemen Cereal production

	2009-2013 average	2013	2014 estimate	change 2014/2013
	000 tonnes		percent	
Sorghum	426	439	430	-2
Wheat	240	233	240	3
Millet	83	83	80	-4
Others	105	109	108	-1
<b>Total</b>	<b>855</b>	<b>864</b>	<b>858</b>	<b>-1</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets



flour).

In October 2014 (last information available), the country's level of annual general inflation was 8.5 percent, up from 5.8 percent in May 2014 when it was at its lowest level since December 2012. Food inflation stood at 3.5 percent, up from 2.15 percent in September 2014.

### Absolute number of food insecure unchanged

Persistent conflict continues to displace households in central areas of the country.

Preliminary findings from the 3rd Comprehensive Food Security Survey (CFSS 2014) in Yemen show that while food security has improved in some areas, an estimated 10.6 million people – over 41 percent of the total population – are currently unable to meet their basic food needs. Of these, 5.6 million are moderately food insecure and 5 million people are severely food insecure, suffering from levels of hunger where external food assistance is generally required and the prevalence of chronic malnutrition among children under the age of five is beyond the international benchmark of “critical.”

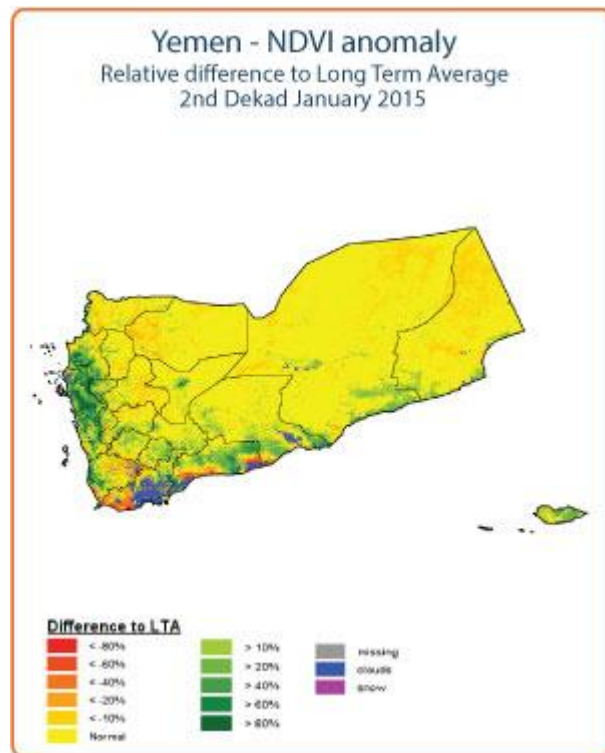
The Comprehensive Food Security Survey, which is usually held every two years, also shows that Global Acute Malnutrition (GAM) rates in Yemen are serious across most of the country and at emergency levels in some areas. Levels of food insecurity across the country showed a slight decline from 45 percent to 41 percent, since the last similar survey in 2011, but there were huge variations among different governorates. In the northern governorate of Sa'ada, almost 70 percent of people were food-insecure, compared with fewer than 10 percent in Al Mahra in the east. Similar disparities are evident in malnutrition rates in different parts of the country, with global acute malnutrition rates ranging from critical, denoting an emergency, in the western coastal governorates of Taiz, Hodeidah and Hajja, to serious or poor in almost all other governorates.

The majority (84 percent) of the total food insecure people live in rural areas, and paradoxically around 2.5 million food producers (e.g. farmers, pastoralists, fishermen and agricultural wage labourers) are also classified as food insecure.

The Integrated Food Security Phase Classification (IPC) analysis from September 2014 confirms the CFSS findings. During 2014, about 4.8 million people (18.3 percent of the population of Yemen) are under Emergency, 5.8 million people under Crisis. The overall current food security situation shows a slight improvement compared to the previous years, however, there are still 10.6 million people (40 percent of the population) under the Emergency and Crisis phases.

A WFP Operation shifting from relief assistance to recovery and resilience to promote food and nutrition security replaced the previous emergency operation. Between 1 July 2014 and 30 June 2016, it will assist many of Yemen's severely food-insecure people through unconditional household food or cash distributions, conditional participatory food assistance activities, nutritional support for the treatment and prevention of acute and chronic malnutrition and micronutrient deficiencies, and meals and take-home rations for school children to improve attendance, nutrition and learning.

The population under crisis and stress phases require different livelihoods based intervention to improve their resilience against the imminent hazards and threats.



Reference Date: 10-November-2014

### FOOD SECURITY SNAPSHOT

- Average cereal crop forecast in 2014
- Retail prices of wheat stable in recent months
- Alarming levels of food insecurity across the country; the number of severely food insecure people doubled since 2009

### Average cereal crop forecast for 2014

Harvesting of the 2014 main season wheat crop was concluded in September while that of sorghum is ongoing and will continue until the end of November. Current reports indicate normal meteorological conditions and the availability of agricultural inputs was adequate. Although locally some areas in the country expect a below-average crop production due to uneven rainfall, an average total cereal harvest is currently forecast. Accordingly, total cereal is put at 860 000 tonnes, including 430 000 tonnes of sorghum and 240 000 tonnes of wheat. A record harvest of more than 1 million tonnes was gathered in 2010.

In March 2012, the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognizes the scarcity of arable land and sustainable water management.

### Slightly increased import requirements

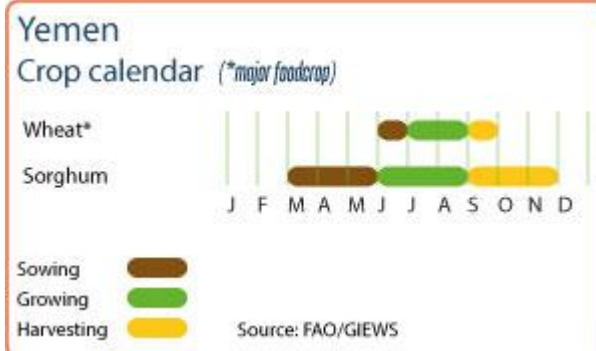
Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent and in the last five years, an average of 2.8 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 3 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for cereals in the 2014 marketing year (January/December) is forecast at about 4.1 million tonnes, about the same as in 2013. Most of the imports is wheat (almost 3 million tonnes), followed by some 700 000 tonnes of maize and 400 000 tonnes of rice.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

### Retail prices of wheat stable in recent months

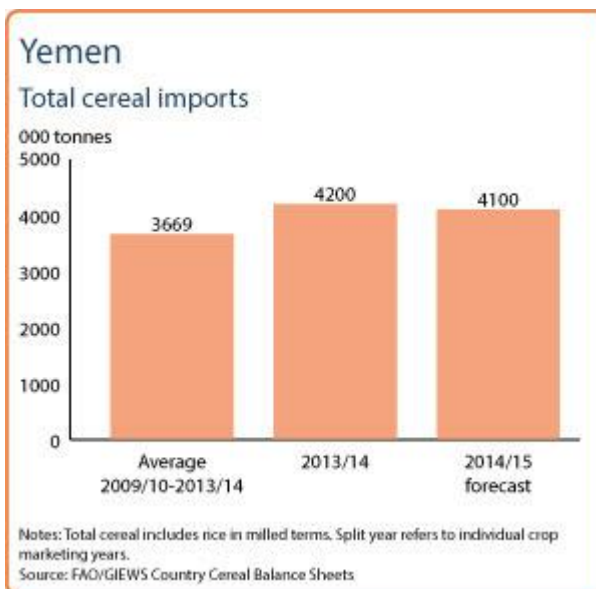
Average retail prices of wheat and wheat flour in specific markets are generally stable on monthly basis with seasonal variations. Large regional differences in retail prices exist depending on quality variation,



### Yemen Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Sorghum	426	439	430	-2
Wheat	240	233	240	3
Millet	83	83	80	-4
Others	105	109	108	-1
<b>Total</b>	<b>855</b>	<b>864</b>	<b>858</b>	<b>-1</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets





transportation costs and distance of the entry ports. The highest prices are generally reported in Sa'ada (YER 135 per kg of wheat in September 2014, YER 145 per kg of flour), while the lowest can be found in Hodieda (YER 128 per kg of wheat and YER 135 per kg of flour).

In July 2014 (last information available), the country's level of annual general inflation was 8.9 percent, up from 5.8 in May 2014 when it was at its lowest level since December 2012. Food inflation stood at 5.5 percent, up from 1.3 percent in May 2014.

## **Number of severely food insecure people almost doubled since 2009**

Persistent conflict continues to displace households in central areas of the country. Escalating conflict, coupled with the recent removal of fuel subsidies (as of 30 July 2014), are expected to exacerbate the food security crisis in Yemen.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance and an additional 5 million people are "moderately" food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with close to half of Yemen's children under five years of age - 2 million children - stunted and 1 million acutely malnourished.

An operation shifting from relief assistance to recovery and resilience to promote food and nutrition security replaced the previous emergency operation. Between 1 July 2014 and 30 June 2016, it will assist many of Yemen's severely food-insecure people through unconditional household food or cash distributions, conditional participatory food assistance activities, nutritional support for the treatment and prevention of acute and chronic malnutrition and micronutrient deficiencies, and meals and take-home rations for school children to improve attendance, nutrition and learning.

Reference Date: 29-August-2014

### FOOD SECURITY SNAPSHOT

- Average cereal crop forecast in 2014
- Retail prices of wheat stable in recent months
- Alarming levels of food insecurity across the country; the number of severely food insecure people doubled since 2009

### Average cereal crop forecast for 2014

Harvesting of the 2014 main season crop is about to start. Current reports indicate normal meteorological conditions, as well as normal availability of inputs. Although, in the crop-producing western parts of the country heavy rains in May offset the precipitation deficit resulting from below-average rains in March and April, the final impact on the production remains to be determined. At about 860 000 tonnes, an average total cereal harvest is forecast.

The 2013 cereal production was estimated at about 864 000 tonnes. At this level, the crop was about 5 percent lower than the previous year's crop and some 5 percent above the previous five-year average. The harvest remained below the record harvest of more than 1 million tonnes in 2010.

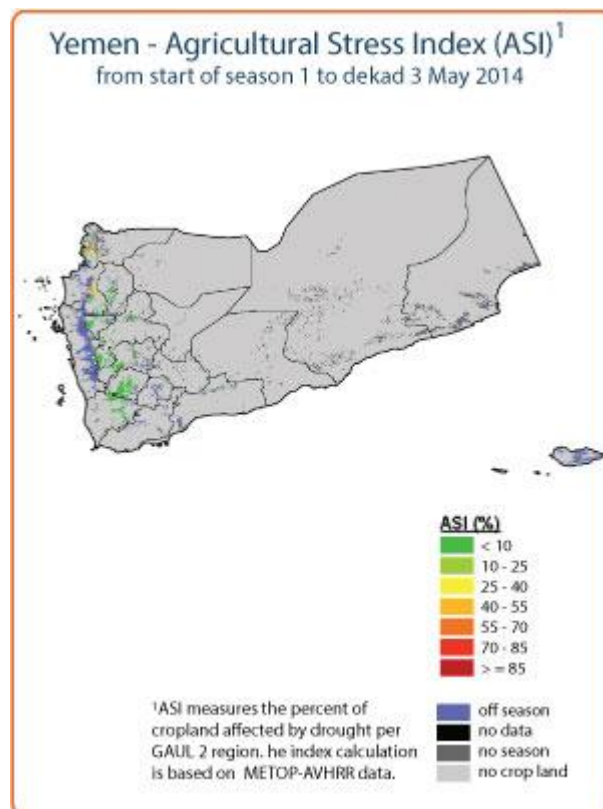
In March 2012, the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognizes the scarcity of arable land and sustainable water management.

### Slightly increased import requirements

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent and in the last five years, an average of 2.7 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.86 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for cereals in the 2014 marketing year (January/December) is forecast at about 3.6 million tonnes, about 4 percent down on 2013. Most of the imports is wheat (almost 2.8 million tonnes), with rice and maize imports forecast almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.



Yemen  
Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Sorghum	426	439	430	-2
Wheat	240	233	240	3
Millet	83	83	80	-4
Others	105	109	108	-1
<b>Total</b>	<b>855</b>	<b>864</b>	<b>858</b>	<b>-1</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

## Retail prices of wheat increasing in recent months

Average retail prices of wheat and wheat flour in specific markets are generally stable on monthly basis with seasonal variations. Large regional differences in retail prices exist depending on quality variation, transportation costs and distance of the entry ports. The highest prices are generally reported in Sa'ada (YER 140 per kg of wheat in June 2014, YER 155 per kg of flour), while the lowest can be found in Amran (YER 130 per kg of wheat and YER 150 per kg of flour).

In May 2014, the country's level of annual general inflation was 5.83 percent, its lowest level since December 2012. Food inflation stood at 1.26 percent.

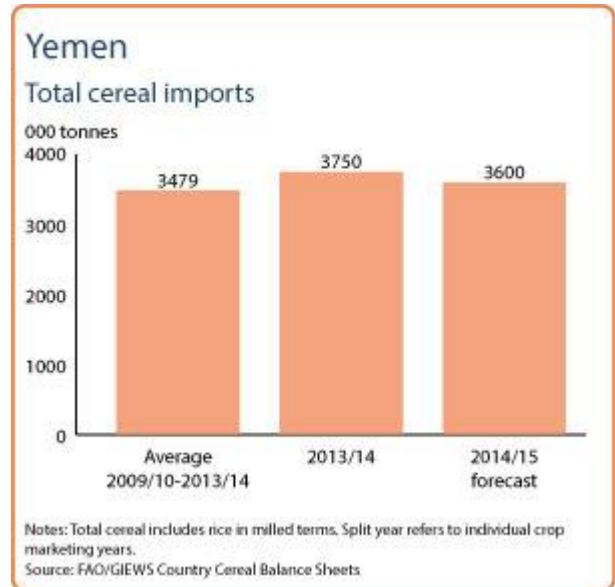
## Number of severely food insecure people almost doubled since 2009

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production and a significant drop in private and public investments. The gradual recovery seen in 2012 and 2013 is likely to continue in 2014.

Persistent conflict continues to displace households in central areas of the country. Internal conflict, coupled with the recent removal of fuel subsidies (as of 30 July 2014), are likely to exacerbate the food security crisis in Yemen.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance and an additional 5 million people are "moderately" food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with close to half of Yemen's children under five years - 2 million children - stunted and 1 million acutely malnourished.

To tackle the food insecurity situation, an Emergency Operation (EMOP), worth USD 315 million has been approved by WFP and FAO on 15 January 2014 to provide emergency food and nutrition support to almost 5.2 million food-insecure and conflict-affected people through food assistance and cash transfers between 1 January and 30 June 2014.



Reference Date: 03-June-2014

### FOOD SECURITY SNAPSHOT

- Average cereal crop forecast in 2014
- Retail prices of wheat stable in recent months
- Alarming levels of food insecurity across the country; the number of severely food insecure people doubled since 2009

### Average cereal crop forecast for 2014

Harvesting of the 2014 grain crop will start in July/August. Current reports indicate normal meteorological conditions, as well as normal availability of inputs. Although in the crop-producing western parts of the country heavy rains in May offset the precipitation deficit resulting from below-average rains in March and April, the final impact on the production remains to be determined. At about 860 000 tonnes, an average total grain harvest is forecast.

The 2013 cereal production was estimated at about 864 000 tonnes. At this level, the crop was about 5 percent lower than previous year's crop and some 5 percent above the previous five-year average. The harvest remained below the record harvest of more than 1 million tonnes in 2010.

In March 2012, the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognizes the scarcity of arable land and sustainable water management.

### Slightly increased import requirements

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent and in the last five years, an average of 2.7 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.86 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for cereals in the 2014 marketing year (January/December), is forecast at about 3.6 million tonnes, about 4 percent down on 2013. Most of the imports is wheat (almost 2.8 million tonnes), with rice and maize imports forecast almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

### Yemen

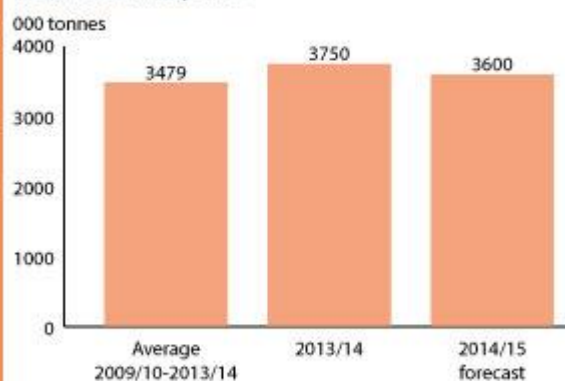
#### Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Sorghum	426	439	430	-2
Wheat	240	233	240	3
Millet	83	83	80	-4
Others	105	109	108	-1
<b>Total</b>	<b>855</b>	<b>864</b>	<b>858</b>	<b>-1</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

## Retail prices of wheat increasing in recent months

Average retail prices of wheat and wheat flour in specific markets are generally stable on monthly basis with seasonal variations. Large regional differences in retail prices exist depending on quality variation, transportation costs and distance of the entry ports. The highest prices are generally reported in Aden (YER 130 per kg of wheat in May 2014, YER 120 per kg of flour), while the lowest can be found in Amran (YER 100 for wheat, YER 130 for flour).

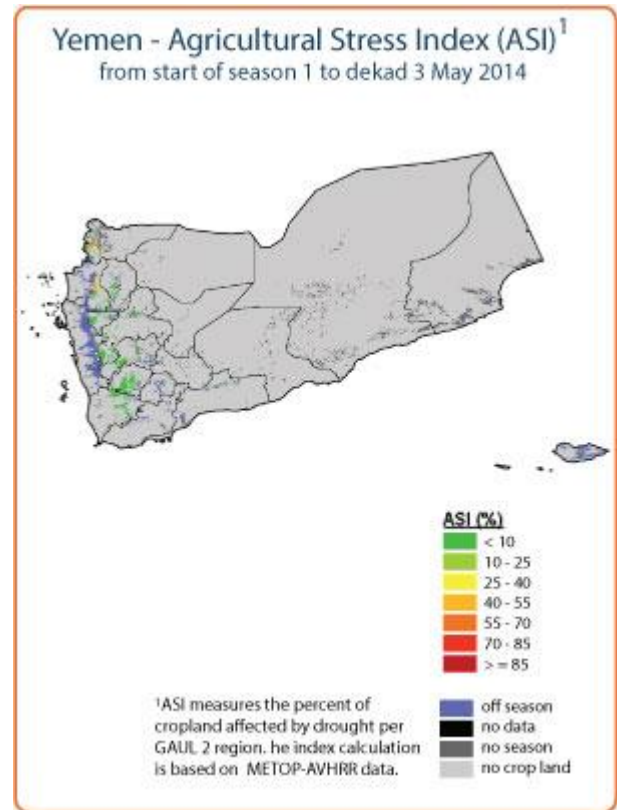
In February 2014, the country's level of annual general inflation was 6.12 percent, its lowest level since December 2012. Food inflation stood at 4.4 percent.

## Number of severely food insecure people almost doubled since 2009

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production and a significant drop in private and public investments. The gradual recovery seen in 2012 and 2013 is likely to continue in 2014.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance and an additional 5 million people are "moderately" food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with close to half of Yemen's children under five years—2 million children—stunted and 1 million acutely malnourished.

To tackle the food insecurity situation, an Emergency Operation (EMOP) worth USD 315 million has been approved by WFP and FAO on 15 January 2014 to provide emergency food and nutrition support to almost 5.2 million food-insecure and conflict-affected people through food assistance and cash transfers between 1 January and 30 June 2014.



Reference Date: 27-January-2014

### FOOD SECURITY SNAPSHOT

- Average cereal crop gathered in 2013
- Retail prices of wheat stable in recent months
- Alarming levels of food insecurity across the country; the number of severely food insecure people doubled since 2009

### Average cereal crop gathered in 2013

Land preparation is currently under way for the 2014 crop. Reports indicate normal meteorological conditions, as well as normal availability of inputs. Planting of coarse grains (mainly sorghum and millet) is expected to start from March, depending on the livelihood zone.

The 2013 cereal production was put at about 864 000 tonnes. At this level, the crop is about 5 percent lower than previous year's crop and some 5 percent above the previous five-year average. The harvest remained below the record harvest of more than a million tonnes in 2010.

In March 2012 the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness, and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognises the scarcity of arable land and sustainable water management.

### Slightly increased import requirements

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent. In the last five years, an average of 2.7 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.86 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for cereals in 2013 (January/December) marketing year, is forecast at about 3.75 million tonnes, about 7 percent up on 2012. Most of the imports is wheat (almost 3 million tonnes), with rice and maize imports forecast almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

### Retail prices of wheat increasing in recent months

Average retail prices of wheat and wheat flour remained relatively

### Yemen

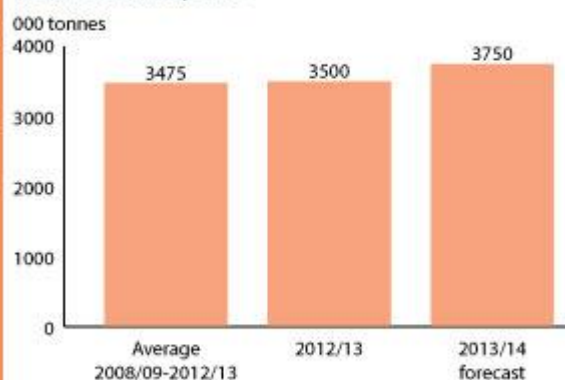
#### Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Sorghum	414	460	439	-5
Wheat	228	250	233	-7
Millet	82	86	83	-3
Others	102	113	109	-4
<b>Total</b>	<b>825</b>	<b>909</b>	<b>864</b>	<b>-5</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

stable in the last five months of 2013. Large regional differences in retail prices exist depending on quality variation, transportation costs and distance of the entry ports. Highest prices are generally reported in Sa'ada (YER 135 per kg of wheat in December 2013, YER 155 per kilo of flour), while the lowest can be found in Amran (YER 100 for wheat, YER 130 for flour).

In November 2013, the country's level of annual general inflation was 8.13 percent while that of food inflation stood at 7.85 percent. Both general and food inflation eased from their double digit levels reached earlier in 2013.

## **Number of severely food insecure people almost doubled since 2009**

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production, and a significant drop in private and public investments. The gradual recovery seen in 2012 and 2013 is likely to continue in 2014.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance, and an additional 5 million people are "moderately" food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with close to half of Yemen's children under five years—2 million children—stunted and 1 million acutely malnourished.

To tackle the food insecurity situation, an Emergency Operation worth USD 315 million (EMOP) has been approved by WFP and FAO on 15 January 2014 to provide emergency food and nutrition support to almost 5.2 million food-insecure and conflict affected people through food assistance and cash transfers between 1 January and 30 June 2014.

Reference Date: 29-August-2013

### FOOD SECURITY SNAPSHOT

- Above average cereal crop gathered in 2013
- Retail prices of wheat increasing in recent months
- Alarming levels of food insecurity across the country; the number of severely food insecure people doubled since 2009

### Above average cereal crop gathered in 2013

Harvesting of the first season crops (wheat, sorghum and millet) is currently under way. According to remote sensing data, rainfall has been below average from March to May in the western highlands (the main cropping areas) and in some western coastal parts, while in the rest of the country rains have been average to above average.

Nevertheless, preliminary forecasts put the 2013 cereal production at about 935 000 tonnes. At this level, the crop is about 3 percent higher than last year's crop and some 13 percent above the previous five-year average. The harvest, however, is likely to remain below the record harvest of more than a million tonnes in 2010.

In March 2012 the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness, and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognises the scarcity of arable land and sustainable water management.

### Slightly increased import requirements

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent. In the last five years, an average of 2.7 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.86 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for cereals in 2013 (January/December) marketing year, is forecast at about 3.75 million tonnes, about 7 percent up on 2012. Most of the imports is wheat (almost 3 million tonnes), with rice and maize imports are forecast almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

### Retail prices of wheat increasing in recent months

### Yemen

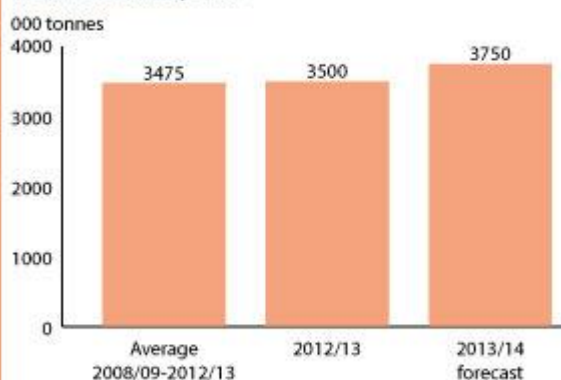
#### Cereal production

	2008-2012 average	2012	2013 forecast	change 2013/2012
	000 tonnes		percent	
Sorghum	414	460	460	0
Wheat	228	250	275	10
Millet	82	86	90	5
Others	102	113	110	-3
<b>Total</b>	<b>825</b>	<b>909</b>	<b>935</b>	<b>3</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets



Average retail prices of wheat and wheat flour declined slightly in the first months of 2013, although increased in June due to increased demand in preparation for the month of Ramadan. For instance, retail wheat prices in the capital Sana'a were YER 135 per kg in June 2013, an increase of about 13 percent compared to one month ago and 4 percent compared to one year ago. However, wheat prices in Sa'ada at YER 130 were 18 percent higher than one month ago, and 26 percent higher than one year ago. Large regional differences in retail prices exist depending on quality variation, transportation costs and distance of the entry ports.

In May 2013, the country's level of annual general inflation was 14.21 percent while that of food inflation stood at 16.79 percent.

## **Number of severely food insecure people almost doubled since 2009**

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production, and a significant drop in private and public investments. The gradual recovery seen in 2012 is likely to continue in 2013.

Persistent civil insecurity throughout the country resulted in the reduction of basic social services, shrinking household resilience, and widespread displacement, with the IDP caseload estimated at about 300 000 as of late April 2013.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance, and an additional 5 million people are "moderately" food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with close to half of Yemen's children under five years—two million children—stunted and 1 million acutely malnourished.

To tackle the food insecurity situation, an Emergency Operation worth USD 250 million (EMOP) has been approved by WFP and FAO on 14 January 2013 to provide emergency food and nutrition support to 5 million food-insecure and conflict affected people through food assistance and cash transfers between 1 January and 31 December 2013.

Reference Date: 03-June-2013

### FOOD SECURITY SNAPSHOT

- Mixed weather conditions at the start of the 2013 cropping season
- Good cereal production in 2012
- Retail prices of wheat are stable in recent months while wholesale prices have surged in April
- Alarming levels of food insecurity across the country; the number of severely food insecure people doubled since 2009

### Mixed weather conditions at the start of the 2013 cropping season

The first season crops, to be harvested from July, are currently in the development stage. According to remote sensing data, rainfall has been below average from March to May in the western highlands (the main cropping areas) and in some western coastal parts, while in the rest of the country rains have been average to above average. According to short term rainfall forecasts, rainfall is likely to be average to above average across the country in June, when crops will be in the critical flowering/grain setting phase. As a result, a satisfactory crop performance can still be expected.

### Good cereal production in 2012

In 2012, despite below-average rains in parts of the country, coupled with social unrest and insecurity that negatively impacted on agricultural activities, cereal production is estimated at 909 000 tonnes, some 11 percent above the previous year's level as well as the last five year average. The harvest, however, remained about 10 percent below the record harvest of more than a million tonnes in 2010.

In March 2012 the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness, and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognises the scarcity of arable land and sustainable water management.

### Stable Import Requirements

Yemen is largely dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple. The import dependency for wheat is about 95 percent. In the last five years, an average of 2.6 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.7 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement for wheat and wheat flour in 2011 and 2012 (January/December) marketing year, was about 2.7 million tonnes,

### Yemen

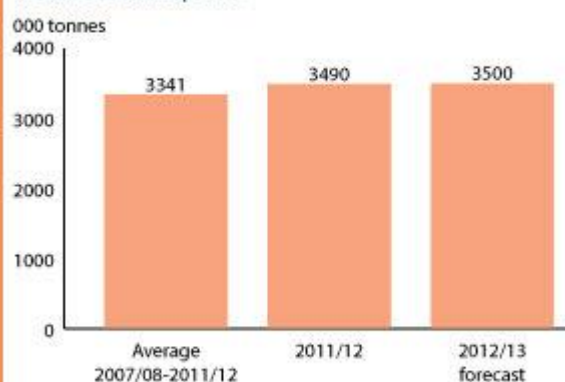
#### Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Sorghum	422	412	460	12
Wheat	222	232	250	8
Millet	84	75	86	15
Others	104	97	113	16
<b>Total</b>	<b>832</b>	<b>816</b>	<b>909</b>	<b>11</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

about 13 percent up from 2010. Rice and maize imports are estimated almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

### **Retail prices of wheat stable in recent months, wholesale prices surging in April**

Average retail prices of wheat and wheat flour were mostly stable in recent months, slightly declining between January and April by 3 and 2 percent, respectively. Compared to 12 months earlier, in April they were 13 and 6 percent lower, respectively. However, average wholesale prices of wheat and wheat flour sharply rose in April, increasing between March and April by 11 and 9.3 percent, respectively, and reaching their highest levels since 2011. The recent prices surges are partly due to conflict in some areas of the south, which have disrupted the functioning of important markets such as Lahj and Aden.

### **Number of severely food insecure people almost doubled since 2009**

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production, and a significant drop in private and public investments. Persistent civil insecurity throughout the country resulted in the reduction of basic social services, shrinking household resilience, and widespread displacement, with the IDP caseload estimated at 300 000 as of late April.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance, and additional 5 million people are “moderately” food insecure and at risk of deterioration in the face of continuing shocks. Child malnutrition rates are among the highest in the world with close to half of Yemen's children under five years—two million children—stunted and one million acutely malnourished.

To tackle the food insecurity situation, an Emergency Operation (EMOP) has been approved by WFP and FAO on 14 January 2013 to provide emergency food and nutrition support to 5 million food-insecure and conflict affected people through food assistance and cash transfers between 1 January and 31 December 2013. By mid May, the operation has received about 49 percent of its required funding of USD 242 million.

Reference Date: 28-January-2013

### FOOD SECURITY SNAPSHOT

- Food prices increased in recent months
- Alarming levels of food insecurity across the country: the number of severely food insecure people doubled since 2009

## Better than expected crop harvested in 2012

Land preparation is currently under way for the 2013 crop. Reports indicate normal meteorological conditions, as well as normal availability of inputs.

In 2012, despite below-average rains in parts of the country, coupled with social unrest and insecurity that negatively impacted on agricultural activities, cereal production is estimated at 909 000 tonnes, some 11 percent above the previous year's level as well as the last five year average. The harvest, however, remains about 10 percent below the record harvest of more than a million tonnes in 2010.

In March 2012 the Government of Yemen approved the National Agriculture Sector Strategy and Investment Plan for 2012-2016. Among the objectives in the agriculture sector are to raise domestic food production through improved input supply, increased farmer awareness, and greater availability of credit; to provide the conditions for higher income to farmers and increased rural employment to fight poverty in rural communities; to preserve environment and natural resources using community participation; and to improve marketing efficiency, decrease post-harvest losses and develop export capacities. The strategy recognises the scarcity of arable land and sustainable water management.

## Stable Import Requirements

The country is almost totally dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple in the country. The import dependency for wheat is about 95 percent. In the last five years, an average of 2.6 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.7 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases and volatility.

The import requirement of wheat and wheat flour in 2011 and 2012 (January/December) marketing year, were about 2.7 million tonnes, about 13 percent up from 2010. Rice and maize imports are estimated almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

## Food prices increased in recent months

According to the World Food Programme (WFP), wholesale prices of wheat and wheat flour, which remained stable since January 2012, began to rise in main urban trading centres following increases in

### Yemen

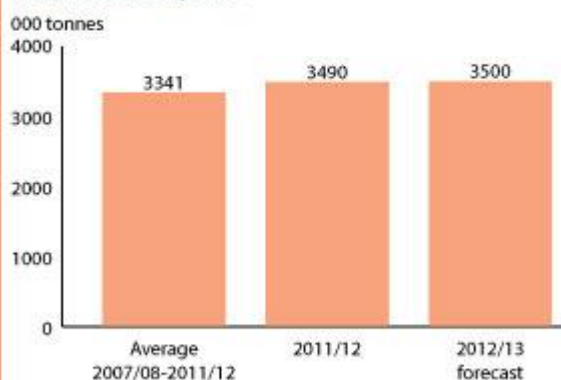
#### Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Sorghum	422	412	460	12
Wheat	222	232	250	8
Millet	84	75	86	15
Others	104	97	113	16
<b>Total</b>	<b>832</b>	<b>816</b>	<b>909</b>	<b>11</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

international prices. Wheat prices eased by 2.6 percent between November and December 2012, although wheat flour prices increased by 8 percent during the same period.

## **Number of severely food insecure people almost doubled since 2009**

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production, and a significant drop in private and public investments. The security situation remains volatile throughout the country with reduction of basic social services, shrinking resilience and other coping mechanisms.

According to a Comprehensive Food Security Survey by WFP released in June 2012, over 5 million people (22 percent of the population) are severely food insecure and in need of emergency food assistance. Additional 5 million people are “moderately” food insecure and at risk of deterioration in the face of continuing shocks.

An updated Emergency Operation (EMOP) has been approved by WFP and FAO on 14 January 2013 to provide emergency food and nutrition support to food-insecure and conflict affected people at a total cost of USD 242 million between 1 January and 31 December 2013.

Reference Date: 25-September-2012

### FOOD SECURITY SNAPSHOT

- Uncertain prospects for the 2012 cropping season
- Food prices increased in recent months
- Alarming levels of food insecurity across the country: the number of severely food insecure people doubled since 2009

### Uncertain prospects for the 2012 cropping season

Harvesting of 2012 sorghum, maize and millet crops is about to start. Satellite based observations indicate that the 2012 rainfall totals were below average in Aden, Sana'a, Lahj, Taiz, Hodeida, Shabwah, Hadramat, Al Muharah, Al Jawf, Marib, and Ad Dali Governates. Below-average precipitation in parts of the country, coupled with social unrest and insecurity are expected to negatively impact agricultural activities.

Current estimates for cereal production are provisionally put at 750 000 tonnes, 8 percent below the previous year's level and 10 percent below the last five year average.

### Higher Import Requirements

The country is almost totally dependent on imports from international markets to satisfy its domestic consumption requirement for wheat, the main staple in the country. The import dependency for wheat is about 95 percent. In the last five years, an average of 2.6 million tonnes per annum of wheat was imported commercially out of a total domestic wheat utilization of about 2.7 million tonnes. As a consequence, the country is highly vulnerable to international commodity price increases.

The import requirement of wheat and wheat flour in 2012 (Jan/Dec) marketing year, is estimated at 2.7 million tonnes, about 13 percent up on the previous year. Rice and maize imports are estimated almost equally at some 400 000 tonnes.

The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

### Food prices, previously stable, increased in recent months

According to the World Food Programme (WFP), wholesale prices of wheat and wheat flour, which have remained stable since January 2012, began to rise in main urban trading centres following increases in international prices. Wheat prices increased between June and July by 3.5 percent, and in August they further strengthened, rising by 8.5 percent.

### Number of severely food insecure people almost doubled since 2009

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production,

### Yemen

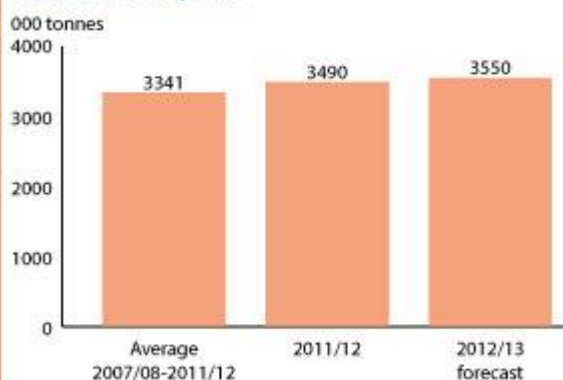
#### Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Sorghum	422	412	400	-3
Wheat	222	232	200	-14
Millet	84	75	65	-13
Others	104	97	85	-12
<b>Total</b>	<b>832</b>	<b>816</b>	<b>750</b>	<b>-8</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

and a significant drop in private and public investments. The security situation remains volatile throughout the country with reduction of basic social services, shrinking resilience and other coping mechanisms.

According to a Comprehensive Food Security Survey by the UN World Food Program (WFP) released in June 2012, over five million people (22 percent of the population) are severely food insecure and in need of emergency food assistance. Among the most vulnerable people in need of humanitarian assistance, there are, as of June 2012, 616 500 IDPs and about 329 000 refugees and asylum seekers, mainly from the Horn of Africa.

On July 23 2012, the U.N. released the updated Yemen Humanitarian Response Plan (YHRP), a consolidated appeal that responds to humanitarian needs in Yemen. The revised YHRP requests 586 million USD in funding for the remainder of 2012—an increase of 31 percent from the original YHRP—and targets six million people. By late September, the YHRP has received nearly 50 percent of its required funding.

Reference Date: 19-April-2012

### FOOD SECURITY SNAPSHOT

- Alarming levels of food insecurity across the country: the number of severely food insecure people doubled since 2009

## Uncertain prospects for the 2012 cropping season that has just began

Land preparation for 2012 sorghum, maize and millet crops, due for harvest from September has begun. Weather conditions are reported to be generally normal, however, social unrest and insecurity are expected to negatively affect agricultural activities.

In 2011, cereal output is officially estimated at 816 000 tonnes, similar to last five years average but about 19 percent below the previous year's record level following a general decline in planted area and yields due to high prices of fuel (used to pump irrigation water from wells) and chemicals as well as worsening of groundwater availability.

The import requirement of wheat and wheat flour in 2012 (Jan/Dec) marketing year, is estimated at 2.7 million tonnes, about 13 percent up on the previous year. Rice and maize imports are estimated almost equally at some 400 000 tonnes. The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of the food import bill. The country's capacity to import is also curtailed by the record low levels of foreign exchange reserves.

## Food prices decline but remain at above average levels

According to the World Food Programme (WFP), prices of basic food commodities, which sharply increased until September 2011, declined in recent months. At national level, prices of wheat flour, cooking oil and sugar decreased from October 2011 to January 2012 by 3, 11 and 17 percent, respectively. However, in January 2012 prices were still between 20 and 30 percent above the level of one year earlier.

## Number of severely food insecure people doubled since 2009

The civil unrest that swept the country since early 2011 resulted in a strong economic downturn, with a real GDP contraction estimated between 8 and 14 percent, mainly due to interruptions in oil production, and a significant drop in private and public investments. The security situation remains volatile throughout the country, worsening especially in the south, with disruption of trade and humanitarian aid distributions effecting food security situation of the most vulnerable people. Limited access to humanitarian agencies is reported in Abyan, Lahj, Shabwah, Hajjah, Amran and Sa'ada Governorates.

According to the preliminary findings of a recent Comprehensive Food Security Survey by the UN World Food Program (WFP), more than 10 million Yemenis (almost 45 percent of total population) are food insecure due to high levels of poverty, prolonged conflict and high food and fuel prices. Currently, the severely food insecure population in

### Yemen

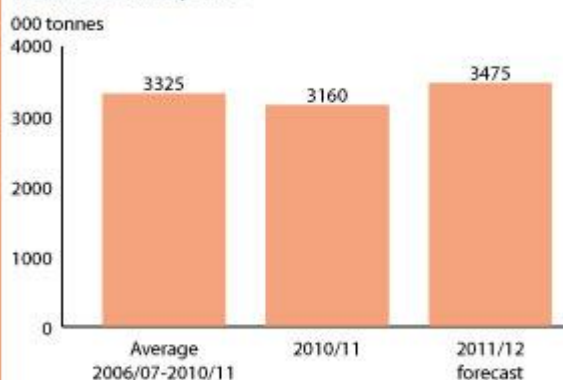
#### Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Sorghum	420	507	412	-19
Wheat	205	265	232	-12
Millet	86	111	75	-32
Others	103	129	97	-25
<b>Total</b>	<b>814</b>	<b>1 012</b>	<b>816</b>	<b>-19</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets



need of emergency food assistance is estimated at about five million, nearly double the level in 2009. The greater concentration of food insecure households is in the highlands and, in particular, in the Governorates of Al Bayda, Mareb and rural Sana'a. More than 50 percent of rural households are food insecure, while in urban areas, where the civil unrest had a stronger impact, household access to food worsened due to insecurity.

Child malnutrition is of special concern, with average rates of prevalence of acute and chronic malnutrition of 13 and 47 percent, respectively. Last January, the UN Children's Fund (UNICEF) warned that half a million children are at risk of dying during 2012 unless sufficient resources are made available to alleviate malnutrition.

Among the most vulnerable people in need of humanitarian assistance, there are 465 000 IDPs, whose number substantially increased during last three to four months following new clashes in northern and southern parts of the country, and about 232 000 refugees and asylum seekers from the Horn of Africa.

Reference Date: 21-October-2011

### FOOD SECURITY SNAPSHOT

- Cereal production in 2011 forecast to be lower than the 2010 good crop
- Overall food security situation has deteriorated following the continued civil unrest and high food prices

### Output of 2011 cereal crops expected to decline

Harvesting of 2011 cereal crops is well underway and production is forecast at slightly below 850 000 tonnes, about 16 percent less than the bumper crop obtained in 2010. Planted area and yields have generally declined due to high prices of fuel (used to pump irrigation water from wells) and chemicals.

Import requirements of wheat and wheat flour in 2011/12 (Jan/Dec) marketing year, are estimated at 2.7 million tonnes, about 13 percent above previous year. Rice and maize imports are estimated almost equally at some 400 000 tonnes. The continued depreciation of the local currency against the US dollar is having a severe negative impact on the overall value of country's food import bill.

### High food prices and civil unrest push more people into food insecurity

The security situation remains volatile throughout the country, especially in Sana'a and Abyan Governorates. The renewed civil unrest that swept the country during the last nine months has disrupted trade and aid distributions, affecting food security situation of the most vulnerable population. Since June, insecurity has hindered food distribution in Abyan, Shabwa and Hadramut Governorates. According to the World Food Programme (WFP), prices of basic food commodities have increased by an average of 46 percent since the beginning of the year due to the high fuel price that raised transportation costs and are currently above their 2008 peak. In particular, the price of bread doubled in the past six months.

Food security for pastoralists, especially in Tihama region of Al Hodeidah governorate, is rapidly deteriorating. Feed crops are very scarce and expensive as their production has been seriously affected by diesel shortage that led to an inconsistent water supply for irrigation. The situation has forced several pastoralists to reduce the size of their herds, selling their animals often at very low prices.

Prior to the current unrest, about 7.2 million people (over 32 percent of households) were estimated to be food insecure, with the highest rates of food insecure households in Governorates of Amran, Rayma, Ibb and Hajjah. These numbers have likely increased in last few months as high food prices and political instability have pushed additional poor households into a condition of extreme food insecurity. Among the most vulnerable people in need of humanitarian assistance, with exceptionally high rates of malnutrition, there are half a million displaced and war-affected people in the North as a consequence of the 7-year long Sada'a conflict, some 70 000 people who fled their homes due to the ongoing fighting in the south and about 212 000 refugees, predominantly Somalis.

### Yemen

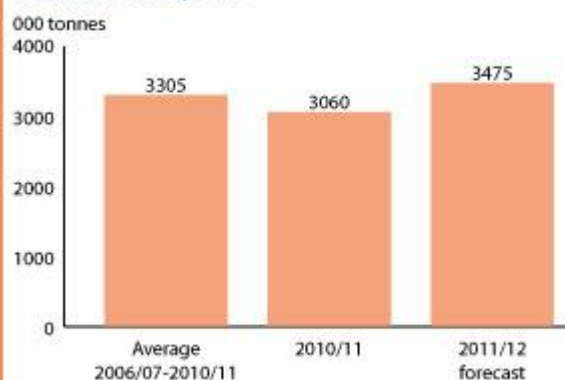
#### Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Sorghum	420	507	410	-19
Wheat	205	265	235	-11
Millet	86	111	95	-14
Others	103	129	107	-17
<b>Total</b>	<b>814</b>	<b>1 012</b>	<b>847</b>	<b>-16</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 24-May-2011

### FOOD SECURITY SNAPSHOT

- Record cereal production in 2010
- Civil unrest restricts humanitarian aid delivery

## Planting of 2011 crops under normal weather conditions

Planting of 2011 sorghum, maize and millet crops, due for harvest from September, is underway under normal weather conditions while sowing of 2011 wheat, barley and pulses crops has been almost completed.

## Bumper crop gathered in 2010

Reflecting favourable rainfall, above-average plantings and adequate availability of agricultural inputs and irrigation, aggregate production of cereals in 2010 is estimated at a record level of about one million tonnes, more than 40 percent higher than the last five years average. Output from the sorghum crop, the main cereal crop grown in the country, increased by some 200 000 tonnes to 507 000 tonnes, which is sharply higher than the average for the previous five years. Wheat production reached a record level of 265 000 tonnes, 19 percent more than 2009, while millet crop increased by 49 000 tonnes to 111 000 tonnes.

Import requirements of wheat and wheat flour in 2010/11 (Jan/Dec) marketing year, are currently estimated at 2.3 million tonnes, about 10 percent below previous year. Rice and maize imports are estimated almost equally at some 360 000 tonnes.

## Civil unrest hampers aid distribution

The security situation remains volatile throughout the country. The civil unrest that swept the country in the last several months is a serious concern to the food security situation of the population, especially the poor and the vulnerable ones. According to the World Food Programme (WFP), the price of wheat flour has almost doubled in the last month and while food shortages are not an immediate danger, aid agencies worry fewer people will be able to afford their basic food.

The situation in northern Governorates of Sa'ada and Al-Jawf, where the risks for humanitarian workers are high, is particularly worrisome. The delivery of food and non food humanitarian aid has in fact often been suspended during last months, with negative consequences especially for most vulnerable households.

Overall, in Yemen, about 7.2 million people (over 32 percent of households) are estimated to be food insecure of which about 2.7 million people are in a severe food insecurity situation. Highest rates of food insecure households are in Governorates of Hajja, Ibb and Al-Dhala, while countryside rural areas have double the share of food insecure people if compared to urban areas. These numbers have likely increased during the last months due to high food prices and the renewed unrest in some parts of the country.

Since the ceasefire on February 2010, the return rate of IDPs to their

### Yemen

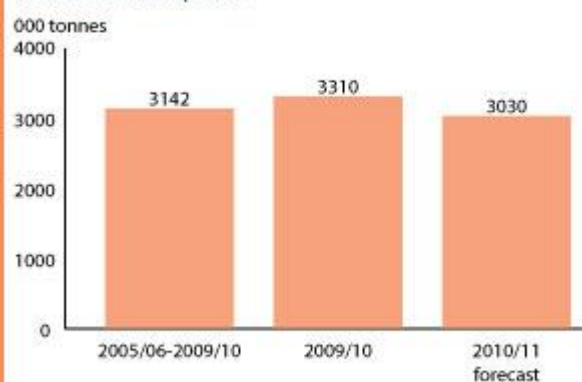
#### Cereal production

	2005-2009	2009	2010	change
	average		estimate	2010/2009
	000 tonnes			percent
Sorghum	371	312	507	62
Wheat	175	222	265	19
Millet	77	62	111	79
Others	88	79	129	63
<b>Total</b>	<b>711</b>	<b>675</b>	<b>1012</b>	<b>50</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

villages has been quite slow due to a wide range of obstacles, including mines and unexploded devices, destruction of housing and infrastructures, lack of basic services and minimal employment opportunities. Currently, it is estimated that about 250 000 IDPs are still in camps and, together with some 170 000 refugees, predominantly Somalis, are in need of food assistance.

Reference Date: 27-April-2011

### FOOD SECURITY SNAPSHOT

- Record cereal production in 2010
- Civil unrest restricts humanitarian aid delivery

## Planting of 2011 crops starts under normal weather conditions

Land is being prepared for 2011 sorghum, maize and millet crops, due for harvest from September, while sowing of 2011 wheat, barley and pulses crops is underway under generally normal weather conditions.

## Bumper crop gathered in 2010

Reflecting favourable rainfall, above-average plantings and adequate availability of agricultural inputs and irrigation, aggregate production of cereals in 2010 is estimated at a record level of about one million tonnes, more than 40 percent higher than the last five years average. Output from the sorghum crop, the main cereal crop grown in the country, increased by some 200 000 tonnes to 507 000 tonnes, which is sharply higher than the average for the previous five years. Wheat production reached a record level of 265 000 tonnes, 19 percent more than 2009, while millet crop increased by 49 000 tonnes to 111 000 tonnes.

Import requirements of wheat and wheat flour in 2010/11 (Jan/Dec) marketing year, are currently estimated at 2.3 million tonnes, about 10 percent below previous year. Rice and maize imports are estimated almost equally at some 360 000 tonnes.

## Civil unrest hampers aid distribution

The security situation remains volatile throughout the country. The civil unrest that swept the country in the last several months is a serious concern to the food security situation of the population, especially the poor and the vulnerable ones. According to the World Food Programme (WFP), the price of wheat flour has almost doubled in the last month and while food shortages are not an immediate danger, aid agencies worry fewer people will be able to afford their basic food.

The situation in northern Governorates of Sa'ada and Al-Jawf, where the risks for humanitarian workers are high, is particularly worrisome. The delivery of food and non food humanitarian aid has in fact often been suspended during last months, with negative consequences especially for most vulnerable households.

Overall, in Yemen, about 7.2 million people (over 32 percent of households) are estimated to be food insecure of which about 2.7 million people are in a severe food insecurity situation. Highest rates of food insecure households are in Governorates of Hajja, Ibb and Al-Dhala, while countryside rural areas have double the share of food insecure people if compared to urban areas. These numbers have likely increased during the last months due to high food prices and the renewed unrest in some parts of the country.

Since the ceasefire on February 2010, the return rate of IDPs to their

### Yemen

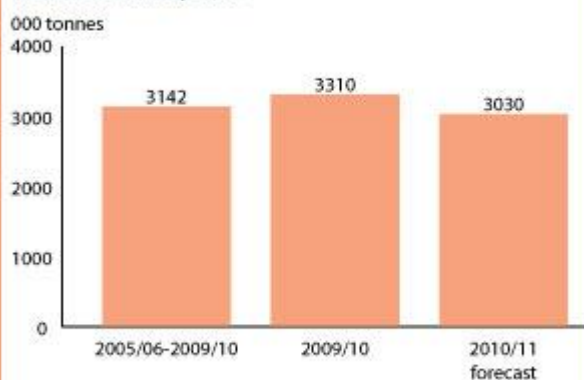
#### Cereal production

	2005-2009	2009	2010	change
	average		estimate	2010/2009
	000 tonnes			percent
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Millet	77	62	111	79
Others	88	79	129	63
<b>Total</b>	<b>711</b>	<b>675</b>	<b>1012</b>	<b>50</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

villages has been quite slow due to a wide range of obstacles, including mines and unexploded devices, destruction of housing and infrastructures, lack of basic services and minimal employment opportunities. Currently, it is estimated that about 250 000 IDPs are still in camps and, together with some 170 000 refugees, predominantly Somalis, are in need of food assistance.

Reference Date: 10-January-2011

### FOOD SECURITY SNAPSHOT

- Substantial increase in 2010 cereal production
- Severely food insecure population estimated at 2.7 million people, but figure are likely to increase
- Renewed civil unrest restricts food aid delivery in some northern governorates

### Good prospects for 2010 crop production

Harvesting of 2010 cereal crops, mainly wheat, barley, maize and pulses, has recently been completed. Cereal production is estimated at 821 000 tonnes, about 15 percent above last five years average following above-average rainfall that induced farmers to increase planted area and resulted in improved yields. Land preparation for planting 2011 crops is underway in main growing areas.

### Imports of cereals remains high to satisfy domestic demand

Yemen relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.55 million tonnes (mainly wheat and wheat flour), slightly above the last five years average.

### Renewed civil unrest hampers food distribution in the north

At the end of 2009, over 32 percent of households (about 7.2 million people) were estimated to be food insecure of which about 2.7 million people were in a severe food insecurity situation. These numbers have likely increased during the last months due to high food prices and renewed unrest in some parts of the country.

The implementation of the Emergency Seasonal Safety Net program for severely food insecure households continued in October and November 2010. It targeted approximately 770 000 persons across most severely food insecure governorates of Raima, Ibb, Hajjah, Amran and Al-Dhala. Food rations were halved from May to October 2010 due to delays in funding of humanitarian agencies and just recently have been increased to 75 percent of full size. In December 2010, food distribution started also in Sana'a, Hajjah and Amran Governorates, but it was delayed in northern Sa'ada and Al-Jawf Governorates due to renewed fighting that severely restricted the access to the area.

Since the ceasefire on February 2010 in northern Governorates of Sa'ada, Hajjah and Amran, security conditions and lack of shelter and employment opportunities have not been conducive to significant returns of IDPs to their villages. Currently about 250 000 IDPs plus some 170 000 refugees, predominantly Somalis, are still in need of food assistance.

### Yemen

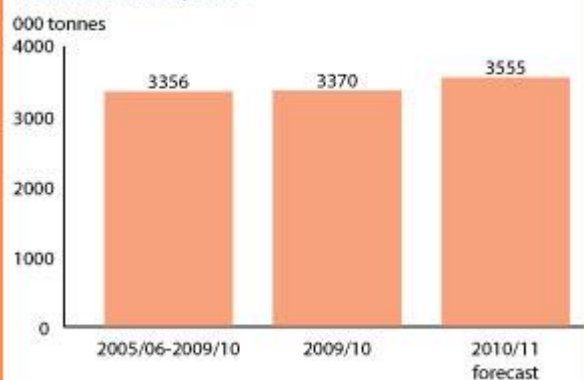
#### Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
Sorghum	371	312	383	23
Wheat	175	222	269	21
Millet	77	62	74	19
Others	89	79	95	20
<b>Total</b>	<b>712</b>	<b>675</b>	<b>821</b>	<b>22</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 15-October-2010

### FOOD SECURITY SNAPSHOT

- Substantial increase expected in 2010 cereal production
- An estimated 2.7 million people are estimated to be severely food insecure
- Additional donations improve food aid distribution to IDPs and refugees

### Positive outlook for the 2010 cropping season

Harvesting of the 2010 cereal crops, mainly wheat, barley, maize and pulses, has just started. Cereal production is expected to exceed the average of the previous five years following above-average rainfall that induced farmers to increase planted area and resulted in improved yields.

### Imports of cereals remains high to satisfy domestic demand

Yemen relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.5 million tonnes (mainly wheat and wheat flour), slightly above the last five years average.

### Full food aid rations likely to be restored soon

At the end of 2009 over 32 percent of households (about 7.2 million people) were estimated to be food insecure of which about 2.7 million people were in a severe food insecurity situation. The severely food insecure are mostly concentrated in the Governorates of Rayma, Amran, Addaleh and Ibb. These numbers are likely to increase during the following weeks until the harvest, that has just began, is well advanced and the produce is brought to market in large quantities.

Since the ceasefire on February 2010 in the northern Governorates of Sa'ada, Hajjah and Amran, a limited number of internally displaced people (IDPs) have returned to their places of origin due to insecurity, landmines and lack of shelter and employment opportunities.

Approximately 300 000 IDPs (about one third of them residing in Hajjah Governorate) plus about 236 000 refugees, the majority of whom are Somalis, are in need of food assistance. Following funding shortfalls for its operation in conflict-affected areas, WFP and partners were forced to halve regular food ration since the beginning of May in order to be able to reach a larger number of individuals. Recently a number of donors have provided additional funding and rations are expected to be restored soon to full size with the imminent arrival of imports.

### Yemen

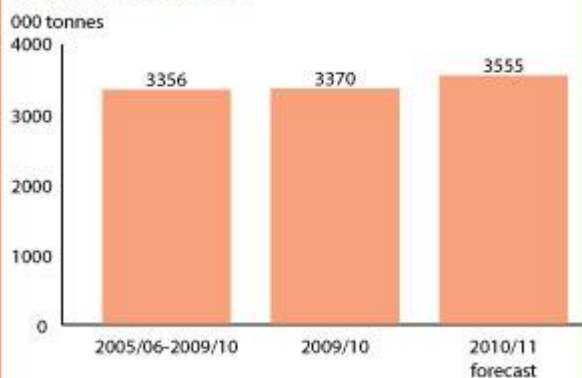
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	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
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Wheat	175	222	269	21
Millet	77	62	74	19
Others	89	79	95	20
<b>Total</b>	<b>712</b>	<b>675</b>	<b>821</b>	<b>22</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 09-September-2010

### FOOD SECURITY SNAPSHOT

- Substantial increase in 2010 cereal planted area
- An estimated 2.7 million people severely food insecure
- Budget constraints limit food aid distribution to IDPs

### Positive outlook of 2010 season

Planting of the 2010 cereal crops, mainly sorghum, wheat and millet, was concluded in June/July and, following above-average rainfall, aggregate cereal planted area is estimated at almost 840 000 hectares (not including about 140 000 hectares of sorghum fodder crop), about 19 percent above 2009 that was affected by late and erratic seasonal rains. In particular, wheat area, which is mostly irrigated, is estimated to have increased to record of 145 000 hectares, about 20 percent higher than last five years average.

If favourable weather conditions continue for the remainder of the season and fertilizers and pesticides will be sufficiently available, the 2010 cereal production could exceed the average of the previous five years.

### Imports of cereals remains high to satisfy domestic demand

Yemen relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.5 million tonnes (mainly wheat and wheat flour), slightly above last five years average.

### More funds needed urgently to sustain food aid for IDPs and refugees

At the end of 2009 over 32 percent of households (about 7.2 million people) were estimated to be food insecure of which about 2.7 million people were in a severe food insecurity situation. The severely food insecure are mostly concentrated in the Governorates of Rayma, Amran, Addaleh and Ibb. These numbers are likely to increase during the lean season that last until October when next harvest takes place.

Since the ceasefire on February 2010 in the northern Governorates of Sa'ada, Hajjah and Amran, only about 14 000 have returned to their places of origin due to lack of employment opportunities, destroyed houses, asset losses and fear of renewed fighting. Approximately 324 000 internally displaced people in the camps plus about 174 000 refugees, the majority of which are Somalis, are in need of food assistance. Following a funding shortfalls for its operation in conflict-affected areas, WFP was forced to halve regular food ration since the beginning of May in order to be able to reach a larger number of individuals.

### Yemen

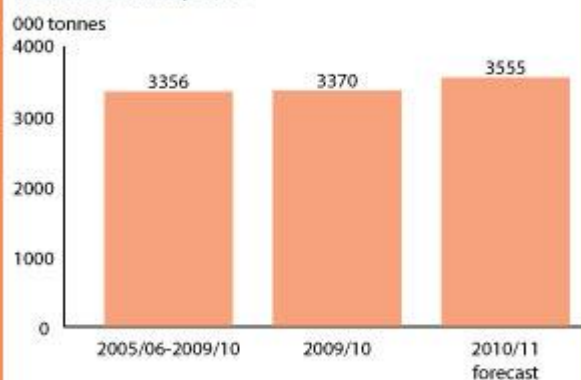
#### Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Sorghum	371	312	383	23
Wheat	175	222	269	21
Millet	77	62	74	19
Others	89	79	95	20
<b>Total</b>	<b>712</b>	<b>675</b>	<b>821</b>	<b>22</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 10-June-2010

### FOOD SECURITY SNAPSHOT

- Substantial increase in 2010 cereal planted area
- An estimated 2.7 million people severely food insecure
- Budget constraints limit food aid distribution to IDPs

### Positive outlook of 2010 season

Planting of the 2010 cereal crops, mainly sorghum, wheat and millet, is underway in main cropping areas. Following above-average rainfall, aggregate cereal planted area is forecast to increase by about 13 percent compared to 2009 that was affected by late and erratic seasonal rains. In particular, wheat area, which is mostly irrigated, is estimated to have increased to record of 146 000 hectares, about 20 percent higher than last five years average.

If favourable weather conditions continue for the remainder of the season and fertilizers and pesticides will be sufficiently available, the 2010 cereal production could exceed the average of the previous five years.

### Imports of cereals remains high

Yemen relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.4 million tonnes (mainly wheat and wheat flour) compared to record 3.9 million tonnes in 2009.

### More funds needed urgently to sustain food aid for IDPs and refugees

At the end of 2009 over 32 percent of households (about 7.2 million people) in Yemen were estimated to be food insecure of which about 2.7 million people were in a severe food insecurity situation. The severely food insecure are mostly concentrated in the Governorates of Rayma, Amran, Addaleh and Ibb. These numbers are likely to increase during the lean season that has just started and expected to last until October when next harvest takes place.

Since the ceasefire on 11 February 2010 in the northern Governorates of Sa'ada, Hajjah and Amran, only about 14 000 have returned to their places of origin and approximately 324 000 internally displaced people are still in the camps. In addition, there are about 174 000 refugees, the majority of which are Somalis, that are in need of food assistance. Following a funding shortfalls for its operation in conflict-affected areas, WFP was forced to halve regular food ration since the beginning of May.

### Yemen

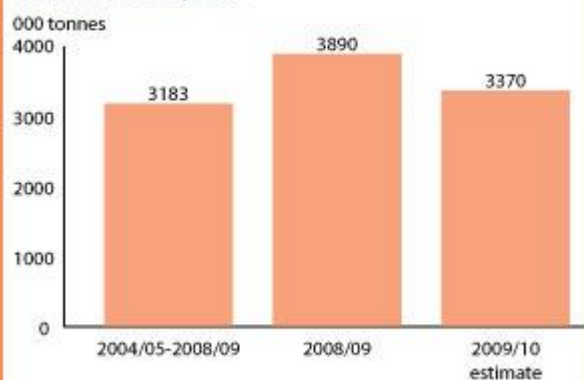
#### Cereal production

	2005-2009	2009	2010	change
	average		forecast	2010/2009
	000 tonnes			percent
Sorghum	371	312	383	23
Wheat	175	222	269	21
Millet	77	62	74	19
Others	89	79	95	20
<b>Total</b>	<b>712</b>	<b>675</b>	<b>821</b>	<b>22</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 13-April-2010

### FOOD SECURITY SNAPSHOT

- Land preparation for 2010 planting is underway
- 2.5 million people estimated to be severely food insecure
- Budget constraints of WFP limit food aid distribution to IDPs

### Planting of 2010 cereals to start in June

Land preparation for the main sorghum and millet crops, to be planted from June, has begun. Weather conditions are reported to be generally normal. The output of 2009 cereal crops is officially estimated at about 675 000 tonnes, 5 percent lower than the previous year level and about 28 percent below the 2007 bumper crop. This result was mainly due to late and erratic seasonal rains that have affected rainfed cereal production in some governorates.

### More funds needed urgently to sustain food aid for IDPs and refugees

A recent WFP Comprehensive Food Security Survey has estimated the food insecure population at 6.8 million. In addition, in the war-affected Governorates of Al-Jawf and Sa'ada about 400 000 people are estimated to be food insecure. Rural areas comprise more than double the number of food insecure people compared to urban areas. About 2.5 million people are estimated to be in a severe food insecurity situation and are mostly concentrated in the Governorates of Rayma, Amran, Addaleh and Ibb.

Following the ceasefire on 11 February 2010 in the northern Governorates of Sa'ada, Hajjah and Amran, only sporadic and limited IDPs returned to places of origin and the number of displaced is still estimated at about 250 000 people. Most of them have decided to remain in the camps due to the lack of food, shelter and basic services in their home areas. Additional 19 000 Somali refugees in the south are receiving humanitarian assistance. As a result of funding shortfall since mid-February, WFP scaled down its regular food ration, with negative consequences especially on children. If additional international funding will not be soon available, WFP is expected to run out of food for 3.2 million people by the end of next June.

### Imports of cereals remains high

The country relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.4 million tonnes (mainly wheat and wheat flour) compared to record 3.75 million tonnes in 2009.

### Yemen

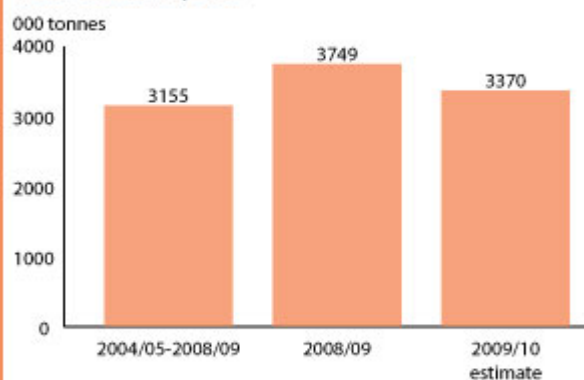
#### Cereal production

	2004-2008 average	2008	2009 estimate	change 2009/2008
	000 tonnes			percent
Sorghum	362	377	312	-17
Wheat	151	170	222	31
Millet	78	74	62	-16
Others	84	93	79	-15
<b>Total</b>	<b>674</b>	<b>714</b>	<b>675</b>	<b>-5</b>

Note: percentage change calculated from unrounded data.  
Source: FAO/GIEWS Country Cereal Balance Sheets

### Yemen

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.  
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 11-February-2010

### FOOD SECURITY SNAPSHOT

- In 2009, dry weather conditions affected crop production in some governorates
- Some 2 million people are estimated as food insecure
- Cereal imports are forecast at 3.1 million tonnes in 2009/10

## Although rains were inadequate in some areas, 2009 cereal production is estimated at average level

Harvesting of the 2009 cereal crops – mainly sorghum, wheat and millet - which started in September has been concluded. An FAO/WFP Crops and Food Security Assessment Mission visited the country in October 2009 and estimated the 2009 aggregate cereal production at 706 000 tonnes, slightly lower than the previous year level, but about 24 percent below the 2007 bumper crop. This result is mainly due to late and erratic seasonal rains that have affected rainfed cereal production in some governorates.

## IDPs in the north estimated at high 250 000

The food security situation continues to be tight in the northern Governorates of Sa'ada and Amran due to the escalating conflict. Here the number of IDPs is estimated at 250 000 people, more than double the number before the start of fighting in August 2009. Currently, the already difficult situation of the IDPs is deteriorating because of the falling temperatures during the cold and windy winter weather. Countrywide, an estimated 2 million people, including conflict affected, refugees and other vulnerable households, are in a food insecure situation and require targeted food assistance, estimated at about 100 000 tonnes during 2010.

## Imports of cereals remains high

The country relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.1 million tonnes (mainly wheat and wheat flour).

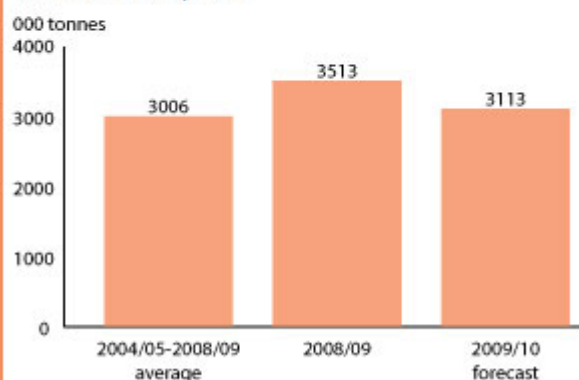
### Yemen

#### Cereal production

	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Sorghum	362	377	388	3
Wheat	151	170	152	-11
Millet	78	74	73	-1
Others	84	93	92	-1
<b>Total</b>	<b>674</b>	<b>714</b>	<b>705</b>	<b>-1</b>

Note: percentage change calculated from unrounded data.

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 01-February-2010

### FOOD SECURITY SNAPSHOT

- Dry weather affected crop production in some governorates
- Some 2 million people are estimated as food insecure
- Cereal imports are forecast at 3.1 million tonnes in 2009/10

### Despite rains were inadequate in some areas, 2009 cereal production is estimated at average level

Harvesting of the 2009 cereal crops – mainly sorghum, wheat and millet - which started in September has been concluded. An FAO/WFP Crops and Food Security Assessment Mission visited the country in October 2009 and estimated the 2009 aggregate cereal production at 706 000 tonnes, slightly lower than the previous year level, but about 24 percent below the 2007 bumper crop. This result is mainly due to late and erratic seasonal rains that have affected rainfed cereal production in some governorates.

### Food insecure people estimated at 150 000

The food security situation continues to be tight in the northern Governorates of Sa'ada and Amran where, due to the escalating conflict, the number of IDPs is estimated at 150 000 people. Countrywide, an estimated 2 million people, including conflict affected, refugees and other vulnerable households, are likely to face increased food insecurity and will require targeted food assistance estimated at about 100 000 tonnes during 2010.

### Imports of cereals remains high

The country relies heavily on imports to meet its food requirements. Total cereal import requirements in 2010 marketing year (January/December) are estimated at about 3.1 million tonnes (mainly wheat and wheat flour).

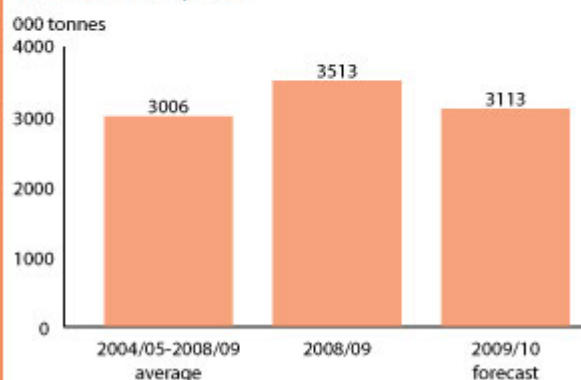
### Yemen

#### Cereal production

	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
Sorghum	362	377	388	3
Wheat	151	170	152	-11
Millet	78	74	73	-1
Others	84	93	92	-1
<b>Total</b>	<b>674</b>	<b>714</b>	<b>705</b>	<b>-1</b>

Note: percentage change calculated from unrounded data.

#### Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.

Source: FAO/GIEWS Country Cereal Balance Sheets