



GIEWS Country Brief Yemen

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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

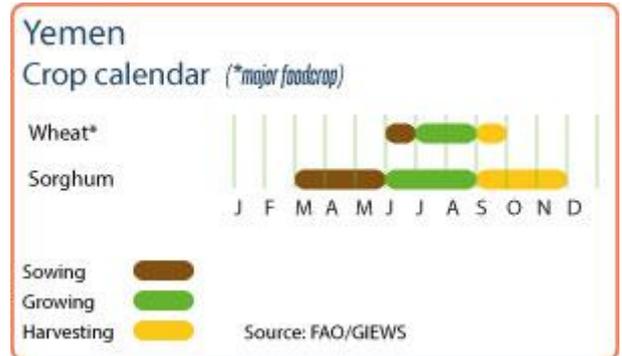
In the country, owing to a variety of natural conditions, agricultural activities vary greatly depending on the location. In Central Highlands, wheat, planted in December, is currently being harvested. Across the country, sorghum, for harvest from September, is currently being planted. Remotely-sensed 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.

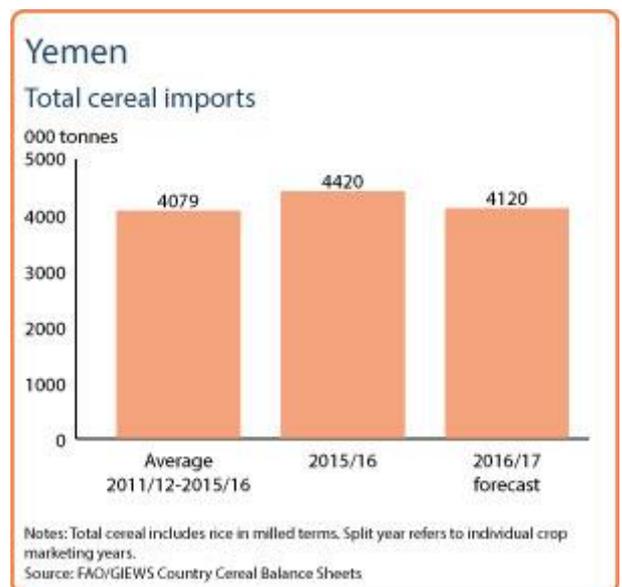
Although abundant rainfall in recent months improved the availability of pasture and water for livestock, 45 percent of the agricultural households have reduced their herds' sizes either



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



intentionally to cover other needs, such as health and food, or due to animal diseases.

While fruit and vegetable production did not deteriorate in 2016 compared to 2015, the lack of marketing channels and the absence of cold chains translated into high prices in the urban centres 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 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. However, the actual amount of imports is below the import requirement. In 2016, slightly less than 1.2 million tonnes of wheat (including wheat flour) were imported through the port of Al Hudaydah. A smaller amount of less than 30 000 tonnes was imported through the port of Al Mukalla 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 only three 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 the country and serving all northern governorates, hinders imports.

Some 17 million people estimated to be food insecure in March 2017

According to the latest Integrated Food Security Phase Classification, 17 million people are estimated to be in Crisis (IPC Phase 3) and Emergency (IPC Phase 4) and require urgent humanitarian assistance from March to July 2017. 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. The most affected governorates are Al Hodeidah and Taiz where almost 2.2 million people are in Crisis and over 1.9 million in Emergency. Here the Global Acute Malnutrition (GAM) prevalence is estimated to be above the WHO critical threshold of 15 percent. Similar levels of GAM prevalence are also reported in Abyan and Hadramout governorates.

The multi-agency EFSNA estimates that some 65 percent of the Yemeni households are food insecure, compared to 41 percent in the pre-crisis period (2014). About 75 percent of the 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 the public employees not being paid. High food prices continue to limit the household access to food. In February 2017, according to the Food Security 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.