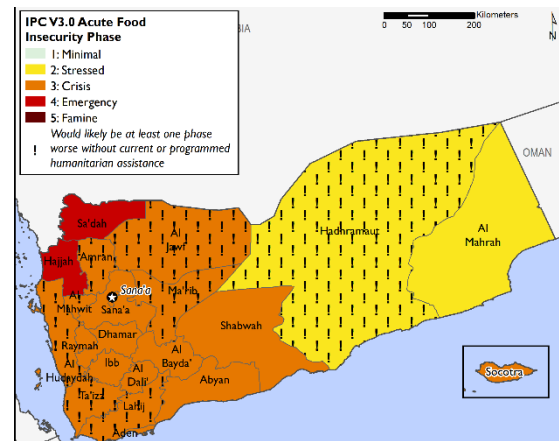


Large-scale assistance needs and risk of Famine (IPC Phase 5) likely to persist as war nears five years

KEY MESSAGES

- Ongoing conflict continues to disrupt livelihoods, reduce incomes, and drive very poor macroeconomic conditions including significantly high prices of food and non-food commodities. It is estimated that approximately 17 million people are in need of humanitarian assistance, representing the largest food insecure population in the world. Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes are widespread. A risk of Famine (IPC Phase 5) persists under a worst-case scenario in which conflict significantly disrupts port operations or cuts off food supply for a prolonged period of time.
- Fuel shortages since September have impacted humanitarian operations in Sana'a and other Houthi-controlled areas in northern and central Yemen. This has negatively impacted livelihoods and exacerbated logistical challenges already faced in delivering assistance. Despite these and conflict-related constraints, humanitarian assistance has scaled-up in 2019, driving some food security improvements. Assistance deliveries are expected to continue during the projection period, though delays and pipeline breaks remain possible.
- Conflict and flooding in western areas of Yemen have increased displacements and led to access constraints. In September, increased conflict was observed in Al Hudaydah and Hajjah. In Aden, conflict subsided in September after high levels in August. However, escalated conflict in surrounding Abyan and Shabwah provinces is ongoing. Meanwhile, heavy rainfall since late September is causing flooding in southern areas of Yemen.

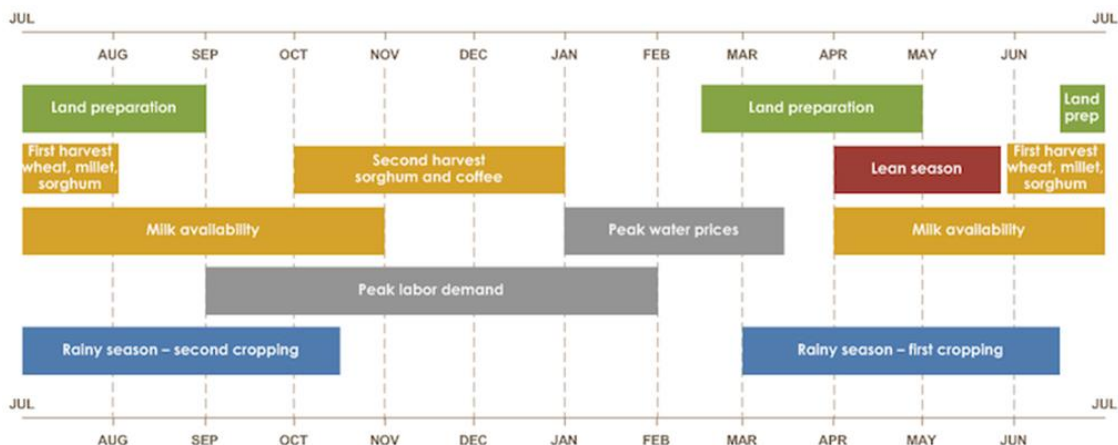
Current food security outcomes, October 2019



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

Despite the ceasefire negotiated in the December 2018 Stockholm Agreement, high levels of conflict have persisted in Yemen throughout 2019. According to data from the Armed Conflict Location and Event Data Project (ACLED), the frequency of battles has remained steady throughout 2019, after a spike in December 2018 (Figure 1). In 2019, roughly 200 battles occurred per month, with 285 battles recorded in September. The number of incidents of explosions or remote violence has steadily decreased in recent months, dropping from a monthly total of 600 in June to 400 in September 2019. Similarly, the number of civilian casualties and fatalities has declined between March and August according to the Civilian Impact Monitoring Project (CIMP), though these events spiked in September to the highest levels observed in 2019.

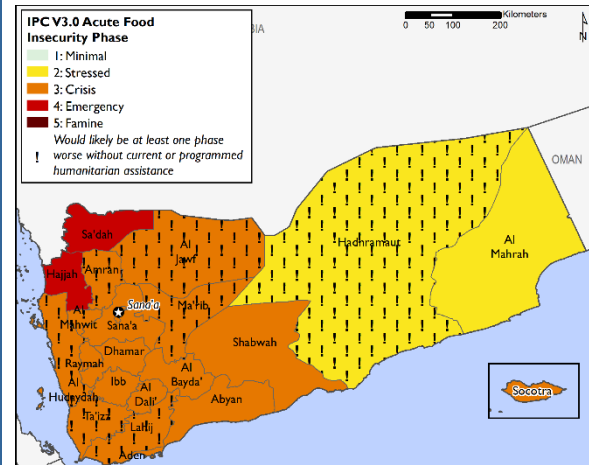
In September, increased levels of conflict at the governorate level were observed in Al Hudaydah and Hajjah. According to ACLED, there was an increase in the frequency of battles, although CIMP reported a decreasing number of incidents and fatalities in Al Hudaydah, Hajjah, Al Mawhit, and Raymah. In September, the highest levels of conflict on the front lines and explosions/remote violence occurred in Al Hudaydah and Hajjah. In Aden, conflict subsided somewhat in September (12 battles) after Saudi-backed pro-government forces and UAE-backed Southern Separatist forces fought for control of the city in August (50 battles). In late September, the UAE began withdrawing troops from the city, with the two sides striking a deal in late October. In surrounding Abyan and Shabwah, escalated levels of conflict continued throughout October according to CIMP, despite an unofficial ceasefire.

In late September, initial steps to engage in peace talks and de-escalation were taken by both main parties to the conflict. While there have been some hopeful reports of reductions in violence in recent weeks, data from ACLED and CIMP for early October do not indicate reductions distinct from normal patterns of volatility.

Widespread and persistent conflict across Yemen continues to disrupt typical livelihood activities and drive large-scale displacement. An estimated 61,378 households (368,268 individuals) were displaced in Yemen between January 1 and October 12, 2019. In early October, most new displacements were due to increased localized fighting in Aden (127 households), Al Dhale'e (350 households), Al Hudaydah (193 households), and Ta'izz (150 households). Over the same time period, the areas that received the most IDPs were Hajjah (17,907 households), Al Hudaydah (9,809 households), Al Dhale'e (9,402 households), and Ta'izz (6,053 households).

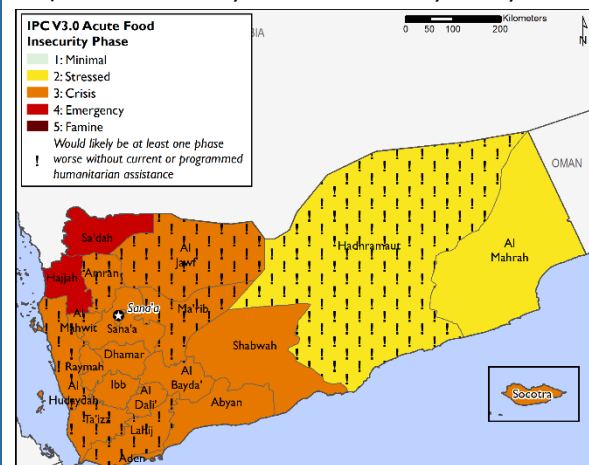
Between June and October, heavy rains (Figure 2) caused flash floods in most western areas of Yemen. In affected areas, rains and floods destroyed the houses of many IDPs and contaminated water supplies. As of September, Al Hudaydah, and Al Mahwit were among the worst-affected governorates, with 4,172 and 1,820 IDP households impacted, respectively. On September 27, further rain caused flooding in southern and central areas of Yemen, impacting 1,329 IDP households in Lahj and 1,057 households in Aden. In Ta'izz, over 800 households were affected. On October 1, heavy rains impacted Hajjah and Al Hudaydah in the west.

Projected food security outcomes, October 2019 to January 2020



Source: FEWS NET

Projected food security outcomes, February to May 2020



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

Very poor macroeconomic conditions continue, characterized by volatility, depreciation of the Yemeni Rial (YER), and shortage of foreign currency. On September 19, Yemeni President Abdo Rabbu Mansour Hadi replaced both the Minister of Finance and the governor of the Central Bank of Yemen in Aden. Meanwhile, on September 22, the central bank in Sana'a suspended the licenses of six money transfer companies, only to reinstate them three days later. Ongoing efforts by the Yemeni government to stabilize the economy and pay government salaries have yet to achieve success and continue to be largely dependent on foreign transfers. According to WFP price data, and corroborated by further key informant information, the national average unofficial exchange rate was over 600 YER/USD in September, a three percent increase from 586 YER/USD in August; the YER has continued to depreciate since April, and remains substantially weaker than pre-crisis levels.

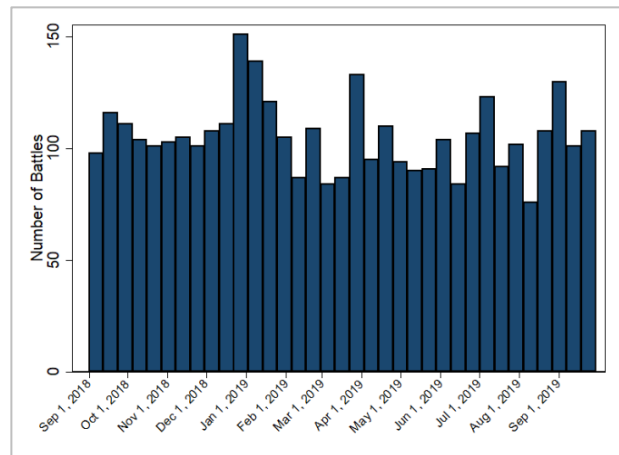
These macroeconomic conditions have severely reduced income earning opportunities. In September 2016, the Yemeni government stopped paying around 1.2 million civil servant salaries and although they resumed payment of salaries in early 2017, payments have been erratic. In late 2018 and early 2019, the government paid public sector pensions in all areas of Yemen as well as salaries in both government- and Houthi-controlled areas of Al Hudaydah, issuing two months' salary to more than 30,000 people in February 2019. The status of future payments remains uncertain. During the 2018-2019 school year, UNICEF paid financial incentives to over 127,000 teachers and school staff. In May 2019, the UAE and Saudi Arabia donated 70 million USD to UNICEF in order to boost the salaries of 137,000 teaching staff in the current school year.

In rural areas, some typical livelihood activities continue, although households face difficulty accessing pre-crisis levels of income. According to a multi-sectoral needs assessment conducted by WarChild in December 2018, interviewees in select districts in Sana'a, Tai'zz, and Ibb governorates indicated that households were earning income through agricultural labor, livestock raising, daily labor, and petty trade, although unemployment was very common. According to a multi-sectoral assessment conducted in two districts in Al Bayda' governorate in February 2019, IDPs are reportedly engaging in some daily labor, but are largely relying on host community support. Difficulties accessing income have resulted, in part, from reduced agricultural activity due to the high cost of diesel for water pumps and the presence of land mines on agricultural land.

Given limited income-earning opportunities, remittances from abroad remain a significant source of income – estimated at billions of dollars annually by the Rethinking Yemen's Economy (RYE) initiative – for millions of Yemenis. Saudi Arabia is a particularly important source of such remittances; however, Saudi Arabia has commenced implementation of a plan to nationalize its labor force in response to high unemployment levels. In early 2018, hundreds of thousands of Yemenis were forced to return to Yemen. It is expected this negatively impacted the income-earning capacity of many Yemenis as well as the overall economy of the country, as remittances from Saudi Arabia are widely considered to be key to the macroeconomic stability of Yemen. Decreases in remittances were particularly significant for Al Mahwit, Hajjah, Ibb, and Lahij.

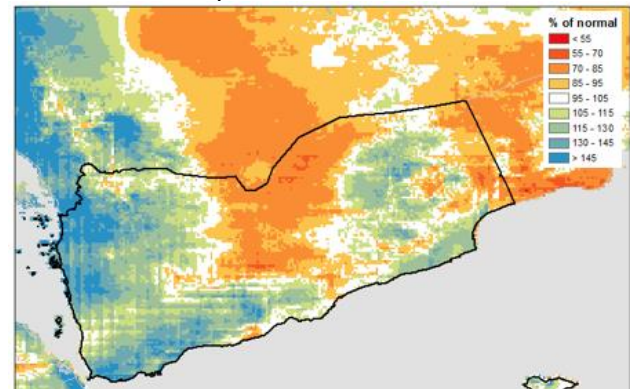
In August, localized fuel shortages began manifesting in Sana'a and surrounding areas, attributed to consequences of new Yemeni government regulations on commercial fuel imports. As a result of these regulations, oil imported into Hudaydah port would be effectively taxed twice – both by the Houthi authorities in the area and by the Yemeni government prior payment of customs duties in Aden. Reports indicated that many importers were unable or unwilling to comply, though.

Figure 1. National trends in the number of battles, September 1, 2018 to September 30, 2019



Source: ACLED

Figure 2. Rainfall as a percent of normal, July 1 – October 10, 2019, CHIRPS rainfully data



Source: USGS/FEWS NET

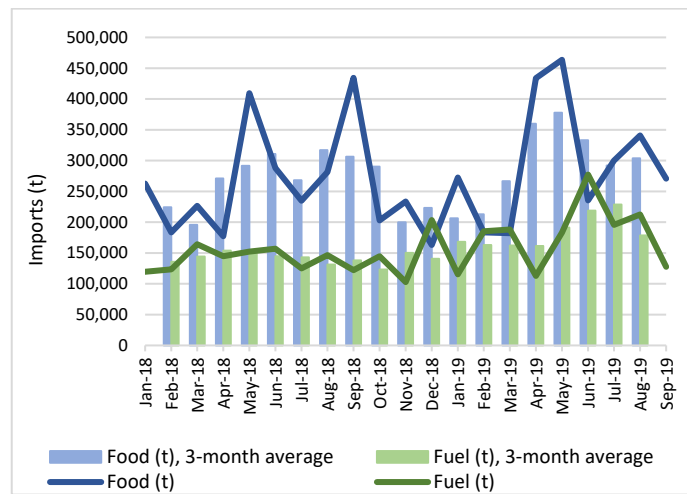
According to UNVIM, 127,632 tons of fuel, representing 69 percent of the 2019 monthly average, were imported through the Red Sea ports of Hudaydah and Salif in the month of September (Figure 3). This was a 40 percent decrease from August and the lowest monthly total since April. Although the information is unverified, WFP estimates monthly imports are far below the national fuel requirement. In late October, according to UNVIM, the Yemeni government cleared eight ships carrying fuel, despite the fact that they were not fully compliant with the new decrees. As such, total fuel imports in October are expected to be above September levels but slightly below recent average levels.

After remaining relatively stable since May, fuel prices increased between August and September according to WFP, and reports indicate that further increases were observed in October. Prices of petrol rose 11 percent nationally from 359 to 398 YER/kg between August and September, while prices of diesel rose 15 percent from 381 to 440 YER/kg. Prices of cooking gas also increased by 13 percent during this time, reaching the highest levels since November 2018. The highest increases in diesel and petrol prices were observed in northern and central Yemen, reaching 89 and 66 percent over August prices, respectively. These increases come on top of prices already over 140 percent above pre-crisis levels for petrol and diesel, and over 60 percent above pre-crisis levels for cooking gas in most governorates according to FAO. Due to shortages, significant quantities of fuel were being traded on the black market, with prices even higher than those reported.

According to FleetMon data, traffic of both cargo vessels and bulk carriers through the port of Aden was down in the months of August and September, attributed to conflict and lingering tensions in the city. Aden typically receives more bulk carrier arrivals than other ports (Figure 4), but only received four per month in August and September, similar to traffic through other ports during that time. Between October 1-15, however, Aden had already received six bulk carrier arrivals. While wheat (grain and flour) comprised a combined total 61 percent of total food import tonnage between January and July 2019 and is typically imported as bulk carrier shipments, other food and non-food commodities may be transported by bulk carrier. Similarly, agricultural commodities including food are also known to be transported via cargo vessels and container ships. As such, caution should be used in attempting to understand how this relates to total food and fuel imports through Aden.

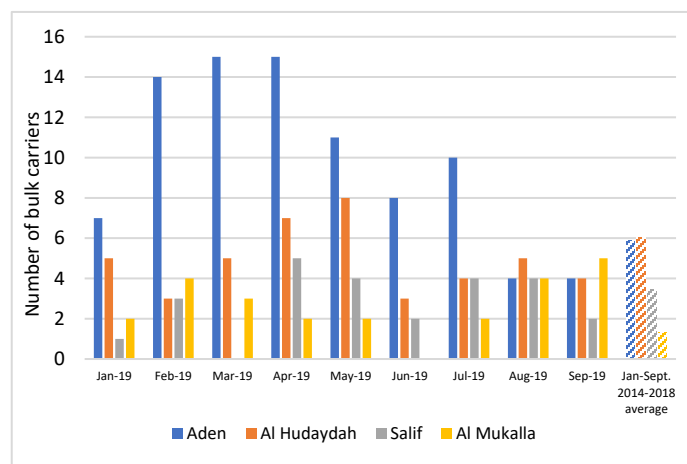
According to FAO, an estimated 3,798,549 MT of food were imported into Yemen between January and August 2019, of which 54 percent entered through the Red Sea Ports of Hudaydah and Salif, followed by 41 percent through Aden Port. According to UNVIM, food imports through the Red Sea Ports totalled 270,820 tons in September, down 20.5 percent from August levels and representing 90 percent of the 2019 monthly average. After averaging only 206,325 tons per month between October 2018 and March 2019 in the time around the Stockholm agreement, food imports through Hudaydah port have increased and have generally remained at levels above the longer term average.

Figure 3. Food and fuel imports through Red Sea Ports, monthly imports (tons) and three-month moving average



Source: UNVIM

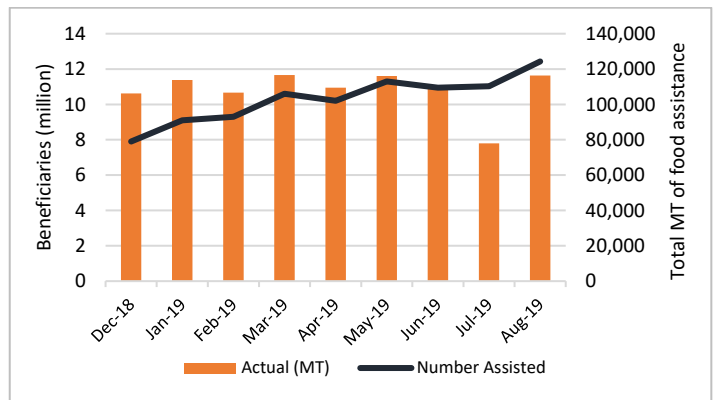
Figure 4. Bulk carrier arrival, January to September 2019 compared to 2014-2018 average



Source: FleetMon

According to both FAO and WFP, wheat flour prices nationally were broadly stable between July and September, fluctuating between 1 and 3 percent. However, more significant price increases of 13-24 percent from August to September were observed in Dhamar City, Ibb City, Al Hawta Town (Lahj), and Sa’ada City. Conversely, wheat flour prices declined between 4 to 8 percent in Mahwit City, Sana’a City, Al Jabeen (Raymah), and Ta’izz City. Overall, wheat flour prices remain highest in Al Hazum (Al Jawf) at 350 YER/kg, with prices of at least 300 YER/kg being observed in Addaleh Town (Al Dali’), Socotra (Hadhramaut), Marib City, and Ta’izz City. At the national level, wheat flour prices are over 90 percent higher than pre-crisis levels, with governorate-level prices ranging between 50-150 percent higher.

Figure 5. Trends in provision of humanitarian food assistance, Dec 2018-August 2019



Source: WFP

Although the contribution of crop production to overall household food sources is low in many areas, harvests continuing through November in the Central Highlands, Eastern Plateau, As’ada Irrigated Wheat Zone, and the highlands and coastal areas will likely improve food security relative to September. Reports of locusts have caused concern for crops in Arahb, Bani Mata, and Hamdan districts in Sana’a. Crop losses were also likely in growing areas in Amran, Al Hudaydah, Lahij, Ma’rib, Shabwah, and Tai’zz. However, locusts are commonly eaten Yemen; in Sana’a, many were catching locusts for consumption and sale, with locust prices decreasing from from 70 to 12 USD per bag in September as a result of the infestation.

Overall, agricultural production of food crops has been declining in recent years and as such, high market dependence for most households combined with high food prices and significantly reduced income earning has resulted in low food access. According to WarChild’s multisectoral assessment conducted in December 2018, interviewees in parts of Sana’a, Tai’zz, and Ibb indicated that households were primarily accessing food via market purchase and humanitarian assistance. Additionally, more recent key informants report that many Yemeni are citing humanitarian food assistance as a key source of food and income, a notable change from their key sources of food and income prior to the outbreak of conflict.

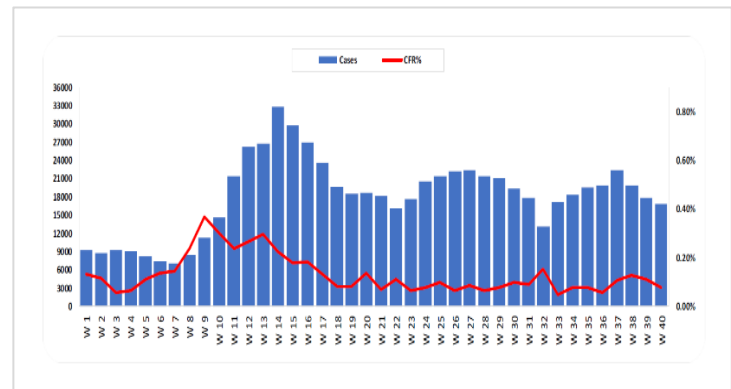
Since the end of 2018, WFP has been scaling up its provision of humanitarian food assistance in Yemen. In August, WFP reached a record 12.4 million beneficiaries (Figure 5) with general food assistance including 116,000 MT of in-kind food and a combined 234 million USD in commodity vouchers and cash assistance (not graphed). Two areas of notable increase include Hadhramut, where assistance increased from reaching around 13 percent of the population in late 2018 to over 25 percent in recent months, and Ma’rib from 42 percent of the population to roughly 73 percent over the same time period. In the latter governorate, the scale-up is expected to be reaching many of the IDPs. Across all forms of assistance, rations provided an average 70-80 percent of daily kilocalorie needs, although variations exist. In July, however, only 78,000 MT of food commodities and an estimated 14.3 million USD in cash/vouchers were distributed, indicating a decline in the ration size by over 20 percentage points from June when rations provided an average of 80 percent of kilocalorie needs across all forms of assistance. Meanwhile, in July, UNICEF completed the fifth round of payments to Social Welfare Fund beneficiaries. Since the first payment was completed in November 2017, 1.5 million of Yemen’s most vulnerable families (an estimated 9 million people) have received an average of 30 USD each payment cycle. The exchange rate in June when payments for the fifth round began was 556 YER/USD. This translates into an average of 16,680 YER per household, equivalent to 37 percent of the minimum monthly food basket according to the Food Security and Agriculture Cluster’s May 2019 update.

It is expected that continued Social Welfare Fund transfers and the scale-up of assistance has led to somewhat better food security outcomes in several areas; however, humanitarian actors continue to face access constraints to delivery of assistance, especially in areas of northern and central Yemen. As of late August, WFP had been reporting delays in deliveries due to trucks being held at Houthi-controlled checkpoints since February 2019. According to key informants, access as of September 5 was classified as “very poor” in Abyan, Aden, Al Hudaydah, Hajjah, Sa’dah, and Shabwah, and “poor” in Al Dali’, Al Bayda’, Sana’a, and Ta’izz. It is expected localized access constraints in these areas are affecting the provision of humanitarian food assistance to some worst-affected populations.

Cholera incidence remains concerningly high in Yemen (Figure 6), with 85,694 suspected cases reported in September. This is 10 percent higher than the monthly average out of a total 703,815 cases reported between January 1 and September 29, 2019. Al Hudaydah, Sana’a, Ta’izz, Amanat Al Asmah, Ibb, and Hajjah were the worst affected governorates in September.

Overall, access to food and income remains below basic requirements for millions of Yemenis. Household access to adequate and stable levels of income remains limited, particularly among IDPs and poor households. While some households are currently accessing agricultural labor, below-average production has likely further limited this source of income. Staple food prices remain high and many lack sufficient income to meet their basic food needs from market purchases. Consumption of locusts in areas where this food source was available is expected to have contributed only minimally and temporarily to energy and protein requirements. Since December 2018, the number of people receiving food assistance has increased by nearly 50 percent, with WFP reaching 12.4 million people in August 2019. This has likely prevented more extreme outcomes and further use of irreversible coping; however, access and other constraints continue to limit delivery to all populations in need.

Figure 6. Trends in reported cholera cases, Jan 1 – Sept 30, 2019



Source: WHO EOC

In mid-to-late 2018, partners and government organizations collected food security data in most districts in Yemen. Among the indicators collected were Food Consumption Score (FCS), the reduced Coping Strategies Index (rCSI), Household Hunger Scale (HHS), and a Livelihoods Coping module. Broadly speaking, these data pointed to Crisis (IPC Phase 3) or worse outcomes. More recent mobile phone surveys from WFP mVAM indicate that around 35 percent of the surveyed population reported Poor or Borderline FCS in August, similar to the results of monthly data collection throughout 2019. These results should be interpreted understanding that phone surveys only sample those who have access to cell phones and therefore may be subject to response bias. Overall, information available suggests large numbers Yemenis face at least moderate food consumption gaps or are engaging in negative livelihoods-based coping strategies in order to try to meet their food needs. Widespread Crisis (IPC Phase 3) or worse outcomes persist even in the presence of ongoing humanitarian food assistance. FEWS NET estimates that approximately 17 million people are in need of emergency humanitarian food assistance.

In 2019, SMART surveys were conducted in districts of Ibb, Ta’izz, Hajjah, Hadhramaut, Shabwah, Sa’ada, and Socotra. Across assessed districts, the prevalence of Global Acute Malnutrition (GAM), as measured by weight-for-height z-score (WHZ), ranged between 6 to 22 percent. The highest GAM prevalence of over 15 percent were observed in Hajjah (Northern Interior, Southern Interior, and Western Lowlands) and Ta’izz (Lowlands), surpassing the WHO threshold of “very high.”

According to UNICEF, 193,693 children in need of nutrition interventions were treated between January and August 2019. In early 2019, the SAM caseload averaged between 27,000 and 29,000 cases per month. This compares to an average of approximately 25,000 in early 2018 and less than 20,000 in early 2017. Generally, the number of children admitted for treatment of severe acute malnutrition (SAM) fluctuates on a month-to-month basis, with changes in admissions often reflecting changes in access to clinics/treatment rather than shifts in malnutrition prevalence. Poor nutrition outcomes can be driven by inadequate food and/or nutrient consumption, poor child feeding practices, inadequate sanitation and hygiene, and disease, including high levels of cholera and diarrhea.

Assumptions

The most likely scenario for the October 2019 to May 2020 period is based on the following national-level assumptions:

- Seasonally dry conditions are expected through February, though above-average land surface temperatures are forecast. The 2020 rainy season starts in March and based on early forecasts, average rainfall is expected.

- Conflict is expected to continue in most western parts the country throughout the scenario period. Given historical trends, fluctuations in conflict will likely occur with the highest levels in Al Hudaydah, Hajjah, and Sa'dah.
- Conflict-related population displacements are expected to continue, and the number of IDPs within Yemen is anticipated to continue to increase at levels near current rates.
- Severe road access constraints are likely to persist in conflict-affected areas, though volatility is anticipated. Access to humanitarian assistance will remain constrained in areas where primary trade/access routes have been affected by conflict throughout the outlook period.
- Very poor macroeconomic conditions are expected to persist throughout the projection period. Specifically, liquidity constraints are expected to continue, limiting import capacity. Oil exports are unlikely return to pre-conflict levels during the scenario period, but will likely remain close to current levels of about 40-50 barrels per day through May 2020. The YER will likely continue to depreciate against foreign currencies, and it is anticipated the Central Bank of Yemen will have limited ability to intervene due to the shortage of foreign reserves. While typical volatility is anticipated, the exchange rate is expected to generally continue increasing through May 2020 and will likely remain between 590-700 YER/USD.
- The Central Bank's current split in management between Sana'a and Aden will likely continue. The Central Bank in Aden will continue to provide a preferential exchange rate to traders to support imports of key staple food commodities, although access to these exchange rates may be more difficult for traders in northern areas.
- Payment of civil servant salaries will likely continue to be erratic or absent in many areas due to the Central Bank's lack of adequate financial resources.
- Total contribution of remittances will likely remain below average through May 2020. Continued disruption of livelihoods coupled with rising inflation will continue to reduce the capacities of better-off households within Yemen to provide normal amounts of remittances. In addition, the nationalization of labor policies in Saudi Arabia combined with delays in processing remittances within Yemen will continue to limit the ability of some households to receive remittances from abroad. Access to remittances from Saudi Arabia is expected to continue declining throughout the scenario period, although at reduced levels given the waiving of the tax on foreign workers within the industrial sector.
- It is expected that cargo will continue arriving into Al Hudaydah, Salif, Aden, and Al Mukalla ports. While large traders will continue to find alternative methods of accessing foreign currency to continue operations, import levels for both food and fuel will likely remain volatile given changing import requirements and high transaction costs.
- Informal food flows across land borders from Saudi Arabia into the western areas of Yemen will continue at reduced levels compared to pre-conflict. Access will remain difficult due to rising civil insecurity.
- It is expected that the Yemeni government will continue to ease restrictions on fuel imports such that, while imports will remain below average, the severity of shortages observed in September will not likely be repeated. FEWS NET anticipates the average quantity of food imported through the Red Sea and Aden ports will continue at recent average levels. Fuel prices are therefore expected to decrease somewhat as supplies are boosted by recent inflows, though remain substantially above pre-crisis levels.
- Active fighting, damaged transportation infrastructure, high fuel prices, and additional security and transaction costs are expected to continue to impede trade flows within the country. Based on past trends, it is likely trade flows will be particularly constrained in western and southwestern Yemen where roads are currently closed.
- Effective demand from consumers is likely to remain atypically low due to weak household purchasing power caused by below-average incomes, high levels of debt, and well above-average prices for essential commodities. Purchasing power may improve sporadically at times during the scenario period as households harvest some agricultural produce, receive salary or remittance payments, and/or receive cash transfers.
- Staple wheat flour prices will likely remain above average across most markets, within the range of 250-340 YER/kg in the markets of Aden, Al Hudaydah, and Sana'a. Wheat prices in these markets are expected to trend between 45-65 percent above pre-crisis levels.

- Agricultural production is likely to remain below long-term averages due to the impacts of protracted conflict, which have resulted in displacements, loss of livelihood productive assets, and restricted access to agricultural inputs.
- It is anticipated that fishing along Red Sea coastal areas and on the Gulf of Aden coast will remain below pre-conflict levels through May 2020, attributed to continuing conflict. Insecurity compounded by high fuel prices has limited access to fishing grounds and reduced capacities to purchase fishing assets, especially in the western coastal areas.
- WFP plans to reach an estimated 12 million people per month through December 2020, an estimated 40 percent of the population and in line with the current scale-up. As of October 27, the Food Security and Agriculture Cluster was only 49.6 percent funded for 2019, though WFP was 74 percent funded for 2019 as of August. In the absence of additional funds, WFP anticipates pipeline breaks are possible for all programs between late 2018 and early 2020. Given historical trends in funding and distributions it is expected that assistance deliveries will continue throughout the projection period; however, pipeline breaks that lead to a decline in the ration are possible, increasingly from March 2020 onward. Additionally, delays in deliveries are expected to continue as humanitarian partners will continue to face increased restrictions on movement, particularly for assistance targeted to households along the western border areas including Al Asimah, Al Hudaydah, Dhamar, Hajjah, Sa'ada, Sana'a, and Ta'izz.

Most Likely Food Security Outcomes

The ongoing food security emergency in Yemen is likely to continue through at least May 2020, with approximately 17 million people requiring emergency food assistance each month. Continued conflict and persistent poor macroeconomic conditions will likely continue to disrupt livelihoods, limiting access to income and food sources. While below-average harvests through December will provide some rural households with food stocks, contribution to total food needs will be limited and stocks are not expected to have major impacts on food security outcomes beyond the near term. Household food access will likely continue to be constrained by above-average food prices, expected to continue to increase during the scenario period.

Under the most likely scenario for October 2019 to May 2020, most areas of western Yemen will be in Crisis! (IPC Phase 3!) and would likely be in Emergency (IPC Phase 4) or worse in the absence of assistance. IDP populations and poor households in conflict zones will likely continue to face the most severe food security outcomes. Conditions for the displaced will vary based on location and will depend on access to labor, support from the host community, access to humanitarian aid, and the functioning of local markets. In two governorates it is expected outcomes have changed relative to earlier are Hadhramut and Ma'rib. In Hadhramut, there has been a notable scale-up in assistance with relatively few access constraints to delivery, alongside slide improvement food security based on available outcomes, and these data support that Stressed! (IPC Phase 2!) is likely. In Ma'rib, where assistance deliveries have also scaled up, increased numbers of IDPs are also present, it is now anticipated that assistance is preventing more severe outcomes and Crisis! (IPC Phase 3!) will continue. In the areas most isolated and cut-off from trade by the conflict, some households are likely to enter or remain in Emergency (IPC Phase 4), and some worst-affected populations may be in Catastrophe (IPC Phase 5) as they begin to exhaust their coping capacities. Areas of greatest concern include Hajjah, Sa'dah, and Al Hudaydah.

In a worst-case scenario, significant declines in commercial imports and/or conflict that cuts off trade and humanitarian assistance to some areas would likely lead to food security outcomes in line with Famine (IPC Phase 5). Military operations increase the risk that key port facilities will be damaged or that key trade routes would be unpassable for a prolonged period of time. Areas of greatest concern include those experiencing intensive conflict and high numbers of IDPs, such as Hajjah, Sa'ada, and Ta'izz, and highly dependent on imports through Al Hudaydah and Salif ports where conflict and blockades are more likely. However, areas that can access imports from Aden are also at risk of Famine (IPC Phase 5) in the event that already severe levels of acute food insecurity are exacerbated by increased competition for available goods. Even in the absence of restricted food supply, further price shocks for essential commodities would also increase the risk of Famine (IPC Phase 5). Finally, should humanitarian food assistance in late 2019 and 2020 fail to materialize, it is likely that many of the more than 12 million people receiving emergency food assistance each month would begin to face larger food consumption deficits and/or be required to engage in more extreme coping strategies in order to try to meet their food needs. Moreover, as assistance currently contributes significantly to the overall food supply in Yemen, the absence of this assistance would lead to further price increases as supply tightens. Together, these factors would increase the number of households whose food security would be at risk of deteriorating to Catastrophe (IPC Phase 5) levels.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Major parties to conflict achieve a lasting ceasefire that improves security and facilitates normalization of livelihood and economic activities.	Food access for many households would begin to improve as prices of staple food commodities decline, household access to food and income begins to return to normal, and IDPs begin to return to their areas of origin. Notably, likely inflows of assistance to Hajjah and Sa'dah would improve food security outcomes among worst-affected households who have been inaccessible. However, additional time would be required before the economy fully stabilizes and major government functions and livelihood activities are able to resume in full.
National	Food imports stop due to destruction or closure of main ports, or major macroeconomic or diplomatic changes	Food prices would quickly rise and, if prolonged, food availability on local markets would decline. Food security outcomes would worsen with areas likely to deteriorate to Famine (IPC Phase 5) in a worst-case scenario.
National	Delivery of humanitarian assistance comes to a halt in localized areas of northern Yemen.	The absence of humanitarian assistance in areas of northern Yemen would likely result in a sizeable increase in the number of households facing Crisis (IPC Phase 3) and Emergency (IPC Phase 4), particularly as households previously receiving assistance begin to engage in more severe coping strategies in order to try to meet their food needs. The size and severity of a deterioration in food security would depend on the scale and duration for which assistance is absent.
National	Yemeni workers in Saudi Arabia become exempt from Saudi labor nationalization policies.	Household access to remittances from Saudi Arabia would stabilize and likely begin to improve again in the medium-term, helping to prevent further deterioration of household purchasing power in Yemen. Food security outcomes would likely improve among households who have a family member earning income in Saudi Arabia.

AREAS OF CONCERN***Al Hudaydah governorate****Current Situation*

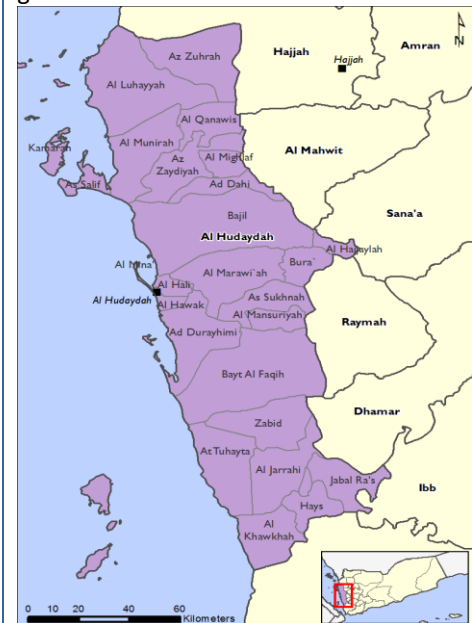
The conflict in Al Hudaydah City that started in late 2014 has continued to date, as the government-allied Saudi-Arabian coalition seek to re-take the city and port of Al Hudaydah from Houthi forces. The relative calm that ensued between 2016 and 2017 ended when intense fighting re-started in June 2018. The port delivers a notable proportion of the country's food and assistance, underlining its critical role in sustaining access to food and non-food commodities in the governorate.

Conflict displaced and estimated 56,436 people from January 1 through September 7, according to IOM, representing 16 percent of all displacements in Yemen during that period. Yemen's Shelter Cluster reported that heavy shelling from air, sea, and land continued during most of August and CIMP reports that the highest rate of conflict events affected civilians were in Al Hali, At Tuhayat, and Hays districts. Overall, an estimated 345,204 people were displaced across the governorate as of mid-September. Displaced populations have lost access to key livelihood activities and productive assets, which is limiting their capacity to meet their basic food and non-food needs.

Crop production, the sale of staple and cash crops, and agricultural labor each contribute moderately (10-30 percent) to poor households' overall food and income. However, access to these sources is notably below average in areas where active conflict is on-going or where substantial displacements have occurred. As a result, income from agricultural labor is expected to also be below normal.

Although production is likely below average, harvests of locally-produced sorghum and millet in Central Wadi and Western Coastal Plains livelihood zones did contribute to a significant decline in local cereal prices in both rural and urban markets in recent months. According to FAO, the post-harvest August 2019 price of locally produced sorghum was 354 YER/kg in Al Hudaydah market, 13.2 percent lower than in July. The decline in the post-harvest price of millet was less pronounced at 385 YER/kg, 4.5 percent lower than in July. Despite these seasonal declines, the price of locally produced sorghum and millet remain nearly 200 percent above pre-conflict prices. Furthermore, these prices are higher than prices in rural markets, due to higher supply in rural areas and high transportation costs driven by fuel costs and access constraints. A kilogram of locally-produced sorghum was 267 YER in rural markets, 32.6 percent lower than in Al Hudaydah market. Millet and barley prices were 6.1 and 36.1 percent lower in rural markets, respectively. Maize and barley prices remained stable between July and August, and are between 300 and 500 percent higher than pre-crisis levels, respectively.

Figure 8. Reference map for Al Hudaydah governorate



Source: FEWS NET

As noted in the national overview, the Red Sea ports of Al Hudaydah and Salif remain functional. With the exception of March and June, when conflict escalated, food tonnages through the ports were higher than respective three-year averages. Substantial month-on-month tonnage variability persisted throughout 2019. WFP's in-country wheat supplies (including in Salalah) totaled 133 thousand tons – just over one month of WFP's national operational requirements. Fuel tonnages through the ports remained higher than respective three-year averages from February to June 2019, with the exception of April 2019. However, the Yemeni government's introduction of new taxes and customs duties on all oil derivatives imported into Yemeni ports have adversely impacted tonnages and concomitant prices, from July, through September.

The prices of imported wheat flour and wheat grain remained stable through most of 2019, though at prices well above pre-crisis levels. According to FAO and WFP, the price of a kilogram of wheat grain was 221-260 YER in August and September in Al Hudaydah market, declining marginally from June and July, but remaining over 120 percent above pre-crisis levels. However, the price was 204 YER/kg in rural markets in August, about 8.3 percent lower than the main city market. The price of wheat flour was 250 YER/kg in August and September in Al Hudaydah market, 108 percent higher than the pre-crisis levels. Driven in large part by higher staple food prices, the average cost of the minimum food basket is roughly 100 percent higher than pre-crisis levels. Consistently above-average staple food prices underlines the prolonged erosion of household purchasing capacity, particularly among poor households and IDPs who have lost substantial livelihood production capacities.

Diesel prices were stable between May and July in Al Hudaydah, around 430-450 YER/liter, but increased significantly from 450 YER/liter to 547.5 YER/liter between August and September according to WFP. This 22 percent rise came after a marginal increase between July and August, and fuel prices are 188 percent higher than pre-crisis levels in August. The price of diesel drives most other prices including fishing, transport, processing, and manufacturing, and the overall high prices above pre-crisis levels, as well as the spike in prices in September, are driving well above average food and non-food commodity prices.

According to the Yemen Logistics Cluster, Al Hudaydah governorate has experienced some of the highest road access restrictions during most of 2019. Several key roads running from south of Al Hudaydah City to southern Mokha City are either closed or inaccessible in western areas of the governorate. On-going conflict, insecurity, and road closures in the southern areas are impeding access to typical livelihood activities and movement in search of labor opportunities, as well as constraining access to humanitarian assistance in areas of active conflict. Limited access across southern areas of the governorate has also increased transport costs as households and traders opt for longer, safer routes to minimize proximity

to conflict epicenters. Subsequently, movement of food and non-food commodities from the Al Hudaydah Port to the rest of the governorate has remained tenuous, and worsened as conflict escalated from June through mid-September 2019.

Due to heavy rainfall, flooding between June and October negatively impacted an estimated 27,000 people in Al Hudaydah, according to OCHA, over 50 percent of all flood-affected IDPs nationally during this time. The worst-affected districts were Al Hali, Al Khawkhah, Al Qanawis, and As Zaydiyah districts. Livestock, crops, livelihoods, and shelters were also washed away. UNICEF, UNHCR, WFP, IOM and partners delivered non-food interventions to 13,764 affected IDPs in accessible areas, as well as food baskets to 9,942 IDPs, and cash assistance to 6,330 IDPs. Floods in this governorate polluted and caused substantial damage to water sources, increasing the prevalence of water and vector borne diseases. Al Hudaydah reported the second highest number of cholera cases (104,169) through 2019, according to the World Health Organization (October 2019), and the [attack rate](#) per 10,000 people is highest in northern districts.

Humanitarian food assistance continues to be provided in Al Hudaydah governorate. Distribution reports are not available at the governorate or district level; however, monthly reports from the Food Security and Agriculture Cluster (FSC) indicate that over 3 million people were reached on average between June to August in Al Hudaydah, Hajjah, Al Mahwit, and Raymah governorates, and FEWS NET estimates almost half of the 3 million reached beneficiaries were in Al Hudaydah. However, restrictions to humanitarian assistance delivery persist. An estimated 45 percent of all humanitarian assistance movement restriction incidents in the country in June and July were in Al Hudaydah, Hajjah, and Sana'a, and Al Hudaydah reported the highest number of access incidents, at 49 incidents out of the national total of 299. Humanitarian partners have reported facing increased restrictions on movement in recent months, including requirements to provide additional documentation particularly for assistance delivery to households along the western border areas.

WFP mVAM tracks standard food security indicators including Food Consumption Score (FCS) and Reduced Coping Strategies Index (rCSI). Results should be interpreted understanding that phone surveys only sample those who have access to cell phones and therefore may not be representative of the population. In August, between 10-30 percent of surveyed households in Al Hudaydah governorate reported borderline or poor food consumption, indicating that food security outcomes have likely remained broadly similar with past months.

Severe Acute Malnutrition (SAM) admissions totaled nearly 40,000 children between January and June 2019, roughly 4,000 to 9,000 children per month. MAM admissions were 60,000 children from January to June 2019. Admissions for MAM and SAM were more than double the number of the next highest governorate, Hajjah, although their total populations are similar.

Based on available information on outcomes and an analysis of poor households' access to food and income, Crisis! (IPC Phase 3!) outcomes likely persist in this governorate. IDPs and poor households have experienced multiple shocks throughout most of 2019, including increased conflict and displacements, substantial movement restrictions, road closures, floods, and cholera. The shocks have reduced households' access to normal food and income sources. Humanitarian food assistance deliveries face constraints to reaching all populations in need, though given the large-scale nature of assistance delivery monthly, it is still expected this assistance continues to prevent more extreme outcomes in this governorate at the area level, though it is anticipated that some worst-affected households are experience outcomes worse than Crisis (IPC Phase 3).

Assumptions

In addition to the above national-level assumptions, projected outcomes for Al Hudaydah governorate are based on the following assumptions:

- Protracted and recently-escalated conflict in Al Hudaydah governorate is likely to persist. The conflict will continue to constrain road access to markets in the southern and western coastal areas, where most key roads were either closed or difficult to access by the end of August.
- On-going conflict, insecurity, and road closures in the southern areas suggest that household access to humanitarian food and other assistance is likely to remain constrained throughout the projection period.
- Based on the expectation of continued conflict, the number of displaced persons is expected to continue at current rates.

- Based on FEWS NET’s integrated price projections, retail wheat flour prices in Al Hudaydah will likely remain between 260 and 300 YER/kg, roughly 45 percent above average, though slightly lower than in 2018 due to the central bank’s financing support of commodity imports at a subsidized exchange rate of 440 YER/USD.
- Given fuel imports well below national requirements, continued conflict, currency depreciation, and increased transaction costs, diesel prices in Al Hudaydah will likely remain between 360 YER and 530 YER/litre.
- Vegetables will be harvested through March 2020 in the Western and Central Wadi and Western Coastal Plain livelihood zones. Fruit will start to be harvested in January, with exception of banana and papaya, for which harvesting will continue only to the end of the year. Increases in agricultural labor income will occur during the harvests but will likely be below normal, due to conflict-related disruptions to livelihood activities and displacement.
- Livestock production and sales in the Western and Central Wadi and Western Coastal Plain livelihood zones will be lower than typical levels; terms of trade are likely to remain below average due to high staple food prices. Furthermore, relatively lower herd sizes and conflict-related disruptions to market access will likely impact overall food access from lower sales of livestock. Milk production, though below-average, will likely be available throughout the outlook period.
- Fishing activities along the coastal areas of Al Hudaydah are expected to remain limited due to international sensitivities regarding the Red Sea waters that will likely limit access to fishing grounds, coupled with lack of fishing equipment.
- Similar to the current situation, humanitarian food assistance deliveries are expected to continue in this governorate at similar levels, though with risk of pipeline breaks in early to mid 2020. Furthermore, access restrictions in Al Hudaydah are likely to impede delivery of humanitarian assistance during the scenario period, particularly in western coastal areas south of Al Hudaydah City to Mokha.

Most Likely Food Security Outcomes

Al Hudaydah Governorate is expected to remain in Crisis (IPC Phase 3!) in the presence of humanitarian food assistance . However, some populations in conflict-hit areas in southern and western areas of the governorate face Emergency (IPC Phase 4) or worse outcomes. Food consumption is anticipated to increase in late 2019 due to increased food availability from harvests of sorghum, millet, maize, and horticultural crops. However, overall below average production will result in fairly rapid depletion of household food stocks. Given seasonal trends and persisting issues of sanitation and hygiene, ‘Critical’ levels of GAM, indicative of Emergency (IPC Phase 4), are anticipated to persist through the outlook period.

Food consumption gaps are expected to increase during the February to May outlook period as household food stocks are depleted. Access to key markets will also continue to be constrained by existing road closures, increasing transport and transaction costs and limiting labor migration. Given the likely delivery of humanitarian food assistance, Crisis! (IPC Phase 3!) are likely to persist, though given the potential for ration reductions during this time period, it is likely an increased number of households will face Emergency (IPC Phase 4) or worse outcomes. Southern and western parts of the governorate are at greatest risk for relatively severe outcomes.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Al Hudaydah	Attacks on Al Hudaydah Port	Severe conflict that would lead to the closure or severe disruption of Al Hudaydah Port would lead to severe food and fuel shortages and impede access to humanitarian assistance for households and IDPs that are overwhelmingly dependent on assistance. Food gaps suggestive of Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5) and associated excess mortalities would likely occur. In a worst-case scenario, in which there is a prolonged closure of Hudaydah port, Famine (IPC Phase 5) would be possible.

Area	Event	Impact on food security outcomes
Al Hudaydah	Escalating conflict that leads to the closure of additional roads	Escalating conflict that leads to the closure of additional roads in Al Hudaydah would likely further restrict humanitarian assistance deliveries and the flow of staple goods to markets. Food prices would likely be higher than currently projected. IDPs and poor households with limited income and food sources will likely experience a deterioration in household food security, leading to a higher occurrence of Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5) outcomes.
Al Hudaydah	Successful ceasefire negotiations	While impacts of the protracted conflict suggests that livelihoods will require several years to move toward pre-crisis productive capacities, a successful ceasefire resulting in a secured port and unrestricted road access would lead to some improvements in household food security during the scenario period. Unhindered delivery of assistance to currently inaccessible food insecure populations and movement of labor, traded commodities, and access to typical livelihood activities would support food security improvements, specifically some reductions in populations in Crisis (IPC Phase 3) and Emergency (IPC Phase 4).
Al Hudaydah	Sharp uptick in the number cholera cases	The number of cases of cholera in Al Hudaydah remains high and Al Hudaydah is susceptible to a further cholera outbreak due to floods that polluted water sources. A sharp uptick in cholera cases would further stretch already inadequate medical facilities during the scenario period and increase Global Acute Malnutrition (GAM) and Severe Acute Malnutrition (SAM) prevalence.

Hajjah governorate

Current Situation

Hajjah Governorate is located in northwestern Yemen, adjacent to Saudi Arabia and is the governorate at the epicenter of the Houthi versus Saudi-led coalition fighting. The conflict in Hajjah governorate escalated in Abs and Haradh districts from August through mid-September, on top of already continuous fighting through most of 2019. According to CIMP, number of monthly violent incidents rose to 72 in September, from under 48 since April, underlining the continuing volatile security situation. Major fighting caused a sudden upsurge in population displacements in March 2019 to 420,000 people, up from 203,000 people between October 2018 and February 2019. Some households have since returned to their places of origin, though overall an estimated 374,820 people remain displaced according to Intelype.

The districts that experienced the greatest infrastructure damage during the conflict included Abs, Abqaiq, Aflah, Haradh, Khayran, Khurais, Kushar, and Midi Mustabad. The Norwegian Relief Council has indicated that multiple displacements have occurred in these districts during the past five years. Many displaced households have lost key sources of food and income, and on-going fighting has constrained access further.

Crop production, the sale of staple and cash crops, and agricultural wage labor each contribute moderately - about 10-30 percent each - to overall household food and income. However, it is expected that access and availability of these sources is well below normal in areas where conflict is on-going or where substantial displacements have occurred. Many displaced populations have moved from lowlands to highlands in Hajjah governorate, where land holdings are relatively small. Due to this and well above-average prices for inputs, staple and cash crop production fell well below pre-crisis levels across the four Hajjah livelihood zones. Successive years of below-average agricultural production throughout the conflict has reduced normal access to food and reduced agricultural labor income.

Although production was below average, the post-harvest price of locally produced sorghum still declined relative to pre-harvest levels. According to FAO, the price of sorghum was 325 YER/kg in Hajjah market in August, 18.2 percent lower than in July. However, the price was still 92 percent higher than August pre-conflict average prices. The uncharacteristic increase in

the post-harvest price of millet was marginal at 379 YER/kg, 1.1 percent higher than in July and 122 percent higher than August average pre-crisis prices. Maize prices have increased by 5.5 percent while barley prices have declined by 4.5 percent between July and August, though prices are 166 and 200 percent higher than pre-crisis levels, respectively. The prices for locally-produced sorghum, maize, and barley in rural markets remained unusually higher than urban markets. According to FAO, a kilogram of sorghum retailed at 354 YER in rural markets, as compared to 325 YER in markets in Hajjah City. Similar trends were observed for maize and barley with urban-rural price disparities of -1.8 and -10.1 percent, respectively.

The prices of imported wheat flour and wheat grain remained stable through most of 2019, maintaining well above pre-crisis levels in Hajjah City. The price of a kilogram of wheat grain was 219 YER in August, declining marginally from June and July, but remaining 184 percent higher than pre-crisis levels. Similarly, the price of wheat flour was 247 YER/kg in August and July but was 147 percent higher than the pre-crisis levels.

Diesel prices remained stable in August as compared to July, but were 186 percent higher than pre-crisis levels. The price of diesel stabilized to 430 YER in August, similar to prices in May and June. The price of diesel drives most other activity prices including fishing, transport, processing, and manufacturing, contributing to above pre-crisis food and non-food prices.

According to the Yemen Logistics Cluster, Hajjah governorate continues to face substantial road access restrictions. Several key roads are either closed or inaccessible in western areas of the governorate, particularly those running from Araquah to Abs, Haradh to Laffar, and Haradh to Wadi. On-going active conflict, insecurity, and road closures in the western areas are impeding access to typical livelihood activities, movement in search of labor opportunities, and access to humanitarian assistance. While the road between the port city of Al Hudaydah and Abs in Hajjah remains open, it is unclear how long it will remain accessible as conflict escalated in mid-September in adjacent areas in Hajjah.

WFP mVAM reports on FCS and rCSI monthly; these results should be interpreted understanding that phone surveys only sample those who have access to cell phones and therefore may be subject to response bias and are not representative. The results are presented in percentage ranges, and in August between 30-50 percent of surveyed households in Al Hudaydah governorate reported Borderline or Poor FCS. This is similar to past months in terms of the percent range, though WFP mVAM reported 46 percent of households reported Borderline or Poor FCS in June, the highest recorded in Hajjah in the past six months.

Hajjah governorate reported 64,886 cholera cases through 2019, according to the World Health Organization (October 2019). Hajjah reported the highest number of cholera deaths during the first quarter of 2019 compounded by critical prevalence of child malnutrition. The cholera outbreak stretched already inadequate medical facilities amidst active conflict, from January through August, underlining the precarious food security situation poor households and IDPs are facing.

Hajjah governorate experienced flooding in early October, affecting an estimated 66,448 IDPs in the governorate, following earlier flood damage from June through August 2019. According to OCHA, an estimated 50,000 IDPs were affected in the governorate, in Aslem, Kharyan Al Maharaq, Kushar, and Mabyan districts. Livestock, crops, and shelters were washed away, most notably in Kushar District. UNICEF, UNHCR, WFP, IOM and partners delivered non-food interventions to IDPs in 13 sites including food baskets and cash assistance. However, some flood-affected households and IDPs could not be reached.

Humanitarian food assistance continues to be delivered in Hajjah, though access constraints persists: According to OCHA, Hajjah Governorate reported 22 access constraint incidents, out of the national total of 299 access restrictions. Access

Figure 8. Reference map for Hajjah governorate



Source: FEWS NET

restriction have increased substantially since July due to the resurgence of renewed conflict in August and September in Abs and Haradh districts. Humanitarian partners report facing increased restrictions on movement and being required to provide additional documentation, particularly to deliver assistance targeted to households along the western border.

According to the Yemen Nutrition Cluster, the GAM (WHZ) prevalence based on surveys conducted in May was 19.8 percent (16.1-24.3) in the western lowland zone, 15.8 percent (12.1-20.3) in the northern interior zone, and 17.1 percent (13.0-22.1) in the southern interior zone, all of which are indicative of Emergency (IPC Phase 4). MAM (34,000 children) and SAM (14,000 children) admissions between January and June 2019 were the second highest in the country, after Al Hudaydah.

Emergency (IPC Phase 4) outcomes are expected in Hajjah governorate, with the severe outcomes most likely in western areas that are heavily conflict-affected. It is anticipated that most poor households and IDPs rely heavily on markets and face significant constraints accessing sufficient food to meet their basic needs. Furthermore, expanding livelihood options and coping are limited by road closures and persistent insecurity. Populations in Abs, Abqaiq, Aflah, Haradh, Hayran, Khurais, Kushar, and Midi Mustabad districts, experienced the most severe conflict and displacements and are of high concern. In areas that are relatively more accessible, humanitarian food assistance is preventing worse outcomes among beneficiaries.

Assumptions

In addition to the above national-level assumptions, projected outcomes for Hajjah governorate are based on the following assumptions:

- It is expected that conflict will continue in western areas of Hajjah governorate, based on the escalating conflict through most of 2019 coupled with the governorate's geographic proximity to the conflict frontier. IDP populations are likely to increase as military operations likely continue.
- Based on FEWS NET's price projections in Al Hudaydah market, wheat flour prices are likely to remain up to 45 percent higher than normal, at 260-300 YER per kilogram due to continued increases in prices at key import markets, as well as expected increases in transportation costs due to high fuel prices.
- Wheat will be harvested between August and October, in Western Central Highland Zone livelihood zone and it is anticipated that during this time agricultural labor income will increase, but will likely be below normal levels. Access to locally-produced wheat is anticipated to result in marginal price declines in rural markets but will have little impact on prices and food access at the aggregate level.
- Livestock production and sales in the Western Central Highland and Western Coastal Plain Livelihood Zones will be lower than typical levels and terms of trade are likely to remain below average. Active conflict coupled with upward pressure on food prices, accentuated by declining exchange rates that are driving inflationary pressures is likely to maintain below average livestock to cereal terms of trade. Milk production will continue until October in most areas of the zones, through the May 2020 outlook period.
- Fishing activities in the western coastal areas of Hajjah governorate in Abs, Haradh, and Medi districts will remain limited due to international sensitivities regarding the Red Sea waters that will likely limit access to fishing grounds, coupled with lack of fishing equipment.

Most Likely Food Security Outcomes

Food severity is anticipated to increase marginally during the early part of the October to January outlook period, following sorghum and millet harvests, coupled with some milk availability. However, recent escalation of conflict in August and September is likely to increase displacements and reduce food access among affected populations. Given access constraints, humanitarian food assistance deliveries are expected to continue to be limited. Due to movement restrictions, livelihood options and coping capacity are also expected to remain limited. Given the likely continuation of high staple food prices, many will continue to face difficulty purchasing sufficient food. Emergency (IPC Phase 4) outcomes are likely to continue, particularly in Abs, Abqaiq, Aflah, Aslam, Bakil Al Mir, Bani Qais, Haradh, Khayran Al, Khurais, Kushar, and Midi Mustabad districts.

Events that Might Change the Outlook

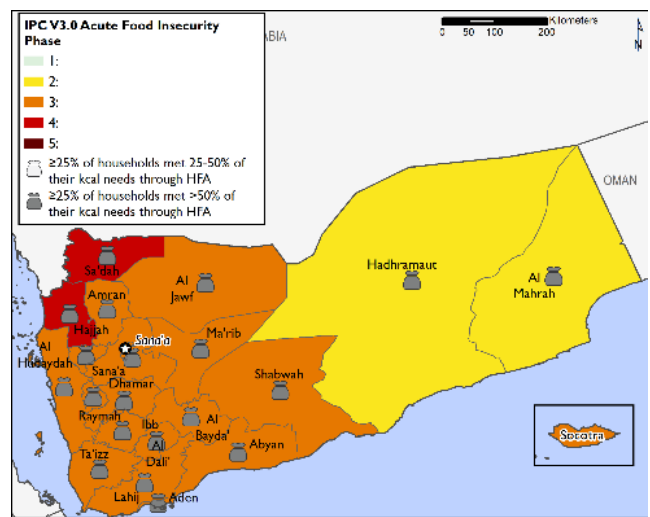
Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
Hajjah	Continued attacks between Houthi and Saudi-led coalition forces	Recent strikes on Saudi oil sites resulted in severe attacks and renewed fighting in September, in western areas of Hajjah Governorate. Under the worst-case scenario, access to food, fuel, and humanitarian assistance will likely be cut off for poor households and IDPs in western areas, as the Saudi Coalition and Houthi forces intensify attacks. Already Emergency (IPC Phase 4) outcomes are likely and continued attacks increase the likelihood of Catastrophe (IPC Phase 5) outcomes and the risk of Famine (IPC Phase 5).
Hajjah	A sharp uptick in the number of cholera cases	The number of cases of cholera in remains high and a sharp uptick in cholera cases would further stretch already inadequate medical facilities during the scenario period and increase Global Acute Malnutrition (GAM) and Severe Acute Malnutrition (SAM) prevalence.
Hajjah	Reduced conflict such that increased delivery of humanitarian assistance is possible and realized	This scenario would increase the likelihood that worst-affected households, particularly in areas of high concern including in Abs, Abqaiq, Aflah, Aslam, Bakil Al Mir, Bani Qais, Haradh, Khayran Al, Khurais, Kushar, and Midi Mustabad districts could be reached with assistance. The severity of acute food insecurity would lessen if assistance was significant and Crisis! (IPC Phase 3!) outcomes would be possible.

MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

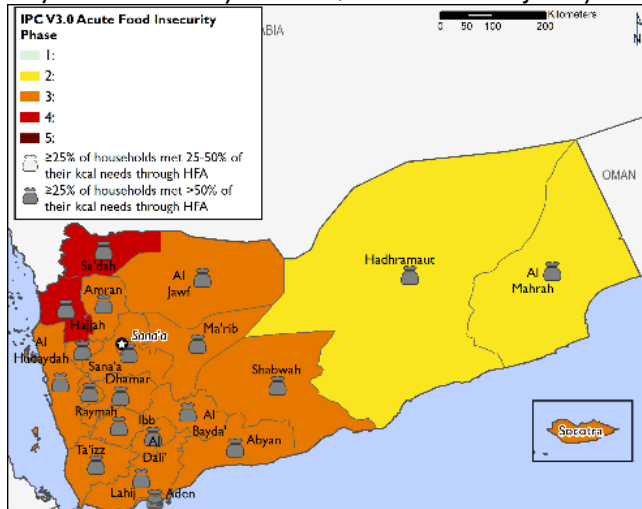
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. 🏠 indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🏠 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, October 2019



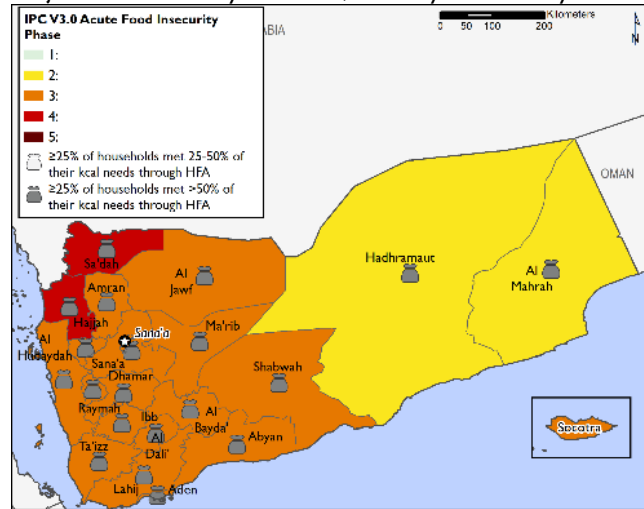
Source: FEWS NET

Projected food security outcomes, October 2019 to January 2020



Source: FEWS NET

Projected food security outcomes, February 2020 to May 2020



Source: FEWS NET

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. [Learn more here.](#)