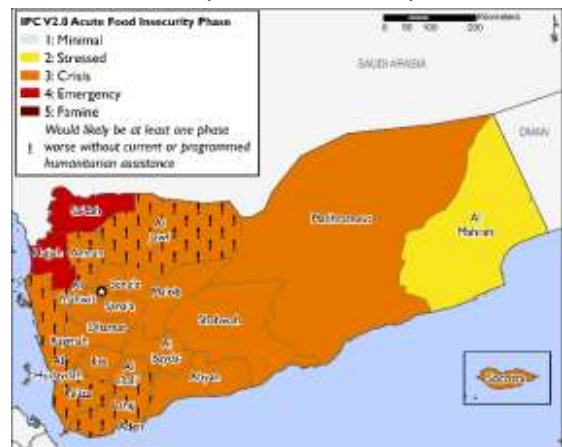


Continued conflict expected to prolong Famine risk in Yemen in 2019

KEY MESSAGES

- FEWS NET estimates that approximately 17 million people in Yemen would be in need of urgent action (IPC Phase 3 or higher) in the absence of ongoing humanitarian food assistance. Sa'ada and Hajjah governorates are in Emergency (IPC Phase 4), which is associated with large food consumption gaps and/or extreme depletion of livelihood assets. Of the remaining governorates in Crisis (IPC Phase 3), six would be in Emergency (IPC Phase 4) in the absence of ongoing assistance.
- Conflict continues in Al Hudaydah governorate, although at lower levels than prior to the Stockholm Agreement reached in mid-December 2018. Meanwhile, hostilities have escalated in Hajjah and Sa'ada governorates. The potential for conflict to significantly disrupt imports and trade through Al Hudaydah City remains a high concern, and in a worst-case scenario could lead to Famine (IPC Phase 5).
- Large-scale humanitarian assistance continues to play an important role in reducing the severity of acute food insecurity outcomes in Yemen. In January 2019, WFP distributed in-kind and voucher assistance to approximately 9.1 million people. At current funding and assistance levels, WFP expects to continue providing assistance through April 2019, and to scale up its assistance to reach 12 million people each month.

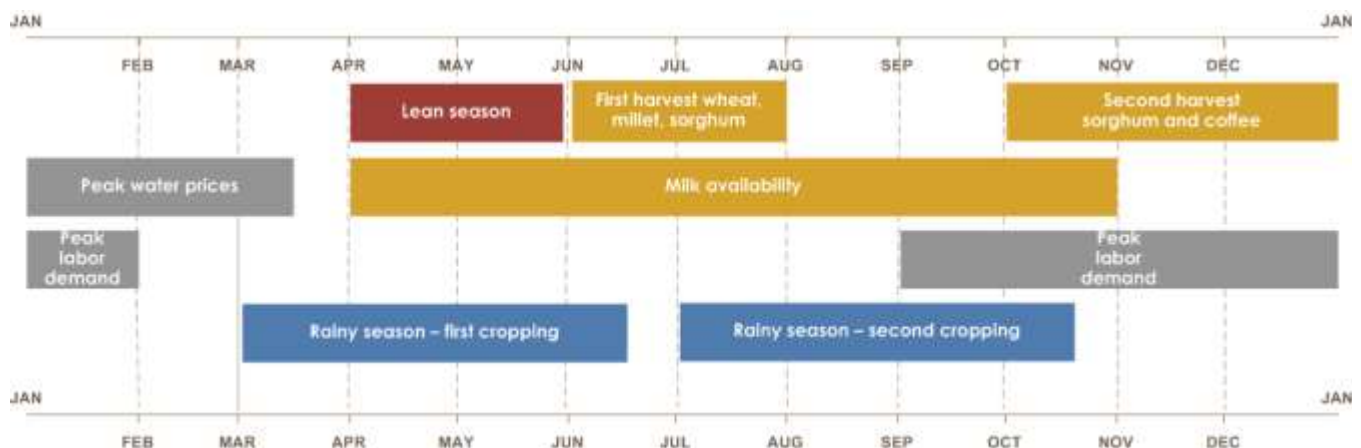
Current food security outcomes, February 2019



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

Conflict

Conflict continues in Al Hudaydah governorate, although at lower levels than prior to the Stockholm Agreement reached in mid-December 2018. Meanwhile, hostilities have escalated in Hajjah and Sa’ada governorates. Reports from OCHA and the International Crisis Group indicate that hostilities have escalated in Hayran and Mustaba districts and near Haradh town in Hajjah governorate, and in Baqim and Al Buqaa towns in Sa’ada governorate. Moreover, in January 2019, tensions have grown between the Houthis and Haugor tribe in Kusher district of Hajjah governorate, resulting in skirmishes and detentions of fighters. Media reports also indicated that additional tribes have been involved in fighting against Houthis from Amran and Hajjah governorates.

According to the Civilian Impact Monitoring Project (CIMP), active conflict along the frontlines in southern Yemen (northern Ad-Dali and Lahij governorates has been limited in January and February, with sporadic skirmishes reported in Dامت and Al-Qabbaytah districts. Fighting has intensified in Al-Husha district of Ad-Dali governorate, on the border with Taiz, during February 2019. As a result of the slowdown on the main fronts as of February 24, there was a reduction in the number of incidents of armed violence directly impacting civilians across the south since January 2019. Between February 21–27, only one incident was reported, the fewest incidents in five weeks.

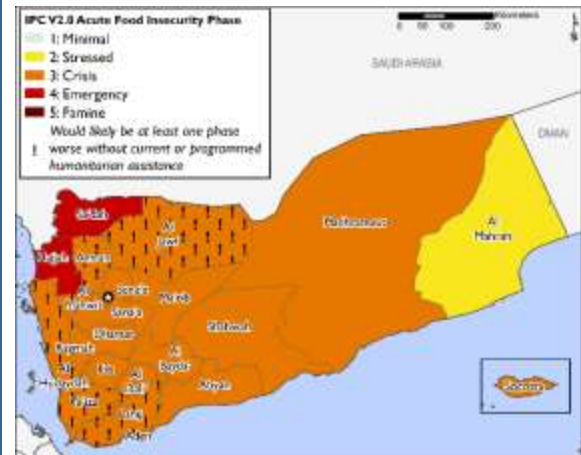
As of late February 2019, the Red Sea ports remain open and commercial and humanitarian imports continue, according to UNVIM reports. The main road connecting Al Hudaydah with Sana’a City and Taiz remains closed and the only road connecting Al Hudaydah City to Sana’a City is from the north on the Al Hudaydah-Hajjah road. On January 25, 2019, mortar fire reportedly started a fire that damaged two silos at the Red Sea Mills on the eastern outskirts of Al Hudaydah City. WFP holds approximately 51,000 metric tons (MT) of wheat at the Red Sea Mills, a quarter of WFP’s in-country wheat stock and enough to feed 3.7 million people for a month. Nearly six months after losing access to the Red Sea Mills, WFP regained access in late February and is assessing damage to its stocks.

Approximately 3.6 million people were displaced in Yemen as of November 2018, according to the International Organization for Migration. This is significantly higher than the 2.3 million people reported displaced as of June 2018 by the Task Force on Population Movement. This increase is likely due to both an increase in the IDP population, as well as organizations’ expanded access to areas where IDPs are present, particularly in Marib governorate. Additional updates from OCHA estimate approximately 1 million people were displaced in Yemen between June 2018 and January 2019, most of whom (659,000) were registered in four governorates: Hajjah, Mahwit, Al Hudaydah, and Raymah. Moreover, more than 10,000 persons have been displaced to Abs, Aslem, and surrounding district in 2019 alone, for a total of 420,000 IDPs in Hajjah governorate alone.

Macroeconomic conditions

The Yemeni Rial has started to depreciate slightly, following improvements in the USD/YER exchange rate in late 2018. Over the past five months, the value of the Yemeni Rial has been very volatile. In October 2018, the Yemeni Rial continued to

Projected food security outcomes, March to May 2019



Source: FEWS NET

Projected food security outcomes, June to September 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.

depreciate sharply, reaching approximately 745 YER/USD, an 18 percent decline in value from September. However, the value of the Yemeni Rial rebounded to 519 YER/USD in December, following commitments by the government of Saudi Arabia to provide significant transfers of foreign exchange in order to help stabilize the macroeconomy. In January, the YER started to depreciate again, reaching 588 YER/USD by mid-March 2018. Presently, the Central Bank of Yemen in Aden (CBY) is providing lines of credit for importation of the main food and fuel at 440 YER/USD.

Food imports and staple food availability

Yemen's major seaports remain open in Al Hudaydah, but monthly import levels have remained volatile over the past several months. According to UNVIM reporting in mid-February 2019, Al Hudaydah and Salif seaports remain open and operational, while the Ras Isa Fuel Terminal remains closed. Overall, ship tracking data suggest the number of bulk carriers, which typically transport most cereals in Yemen, has generally reduced in January 2019 by approximately 20–25 percent compared to the average monthly arrivals between July and December 2018.

Imports of food commodities through the Red Sea ports have been volatile in early 2019. Approximately 272,494 MT of food commodities were imported in January 2019, a 67 percent increase compared to December 2018, according to UNVIM. In February, food imports decreased by approximately 33 percent compared to January 2019, and a 29 percent decrease compared to the average quantity imported in 2018. According to UNVIM data, average monthly food imports through Al Hudaydah and Salif ports were approximately 19 percent lower in 2018 than in 2017. UNVIM estimates the average quantity of food imported per month between January and December 2018 was approximately 258,410 MT, compared to a January to December 2017 monthly average of 317,866 MT. Due to the nature of the data available, it is difficult to compare these totals with import requirements for any particular commodity or staple cereal, such as wheat.

As of January 28, 2019, WFP estimates the quantity of in-country available stock of food commodities was approximately 569,470 MT. According to WFP, the availability of staple foods has shown improvements in January compared to the previous month, and WFP expected cereal stocks to be enough to cover the national requirement until the third week of March 2019.

Fuel imports

According to UNVIM and available data from the Yemen Gulf of Aden Ports Corporation, fuel imports into Yemen between January and October 2018 totaled approximately 3 million MT, or approximately 302,000 MT per month. In February 2019, fuel imports through the Red Sea ports increased by approximately 30 percent compared to the average levels observed between January and December 2018 and covered only approximately 34 percent of monthly needs. In addition, according to available information from Yemen Gulf of Aden Ports Corporation in Aden, the average imported fuel during January to October 2018 covered about 30 percent of monthly needs.

Internal trade

Road access remains difficult in much of Yemen, with the Yemen Logistic Cluster reporting in January 2019 showed no change in the road openings and closures compared to December 2018. Overall, more roads remain closed than in May 2018, prior to the onset of the June 2018 military offensive in Al Hudaydah. According to the Logistics Cluster, many roads are closed in western, southwestern, and northwestern Yemen, with all routes in Sa'ada governorate reportedly closed. In May, road access in many of these areas was reportedly difficult, but still passable, according to the Logistics Cluster. In particular, the main road between Al Hudaydah and Sana's via Al Marawaha is closed, while access was easy in May. In response, people are now using the road from Al Dahi to Bajil to reach Sana'a City, which is longer and more costly.

Commodity availability on markets

Staple food commodities remained available on most markets in January 2019, in line with findings over the past three months. According to the WFP Market Watch Report for January 2019, wheat flour was "available" (the highest of five rankings) in 21 out of 22 governorates in Yemen and "sparsely available" in Socotra (the third highest of five rankings, meaning it was found in at least half of the visits to all markets). WFP indicated that most of the food commodities in Al Hudaydah markets are available except for vegetable oil, which was widely available (the second highest of five rankings).

Diesel, petrol, and cooking gas were “sparsely available” and “widely available” in January 2019 across most markets in Yemen, in line with findings over the three months prior. Diesel and petrol were “sparsely available” in 11 of 22 governorates, “widely available” in 10 governorates, and “available” in Al Mahrah governorate only. Cooking gas was “sparsely available” in 13 of 22 governorates and “available” in Abyan, Aden, Al Dali, Aden, Al Jawf, Al Mahrah, Hadramout, Lahj, Marib, and Shabwa.

Fuel prices

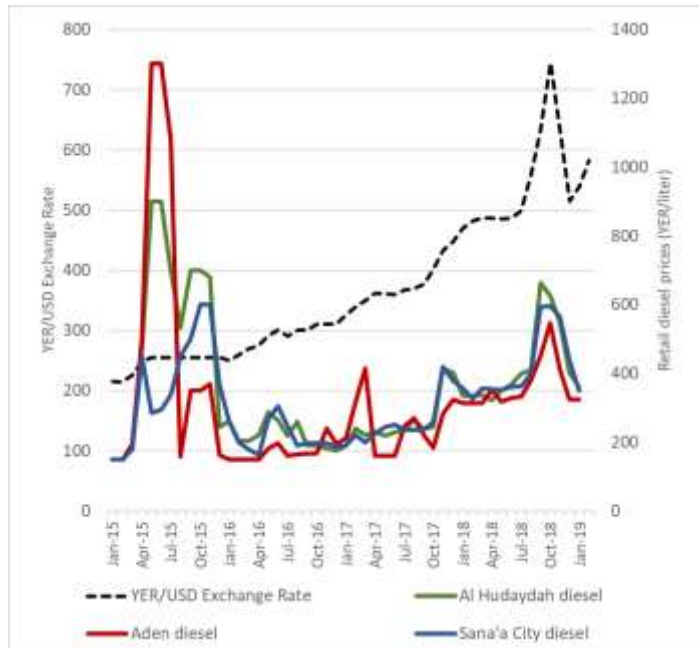
Fuel prices declined sharply in late 2018 and January 2019, after increasing sharply in September 2018 (Figure 1). In January 2019, diesel prices were approximately 325–360 YER/liter in the main markets of Al Hudaydah, Aden, and Sana’a City, which is approximately 40 percent lower than in October 2018, according to WFP data. These recent improvements are attributed, at least in part, to improvements in the YER exchange rate. January 2019 diesel prices on these markets were at or slightly above January 2018 levels, 45 to 55 percent higher than the recent four-year average, and 110 to 140 percent higher than in January 2015, prior to the ongoing conflict. Well above-average fuel prices continue to negatively affect typical livelihood activities, such as agriculture, and contribute to increased prices of food and non-food commodities through higher transaction costs. High prices and limited availability have also constrained water access as many areas rely on pumping water for human use.

Wheat flour prices

Wheat flour prices also declined sharply in late 2018, although slight increases occurred in January 2019 (Figure 2). In January 2019, wheat flour prices were approximately 260–280 YER/kg in the main markets of Al Hudaydah, Aden, and Sana’a City, which is approximately 25–35 percent lower than in October 2018 in Al Hudaydah and Sana’a City, and about seven percent lower in Aden. As with diesel prices, these recent improvements are attributed, at least in part, to improvements in the YER exchange rate. January 2019 wheat flour prices on these markets are 17 to 40 percent higher than in January 2018, 55 to 66 percent higher than the recent four-year average, and 80 to 100 percent higher than in January 2015, prior to the ongoing conflict.

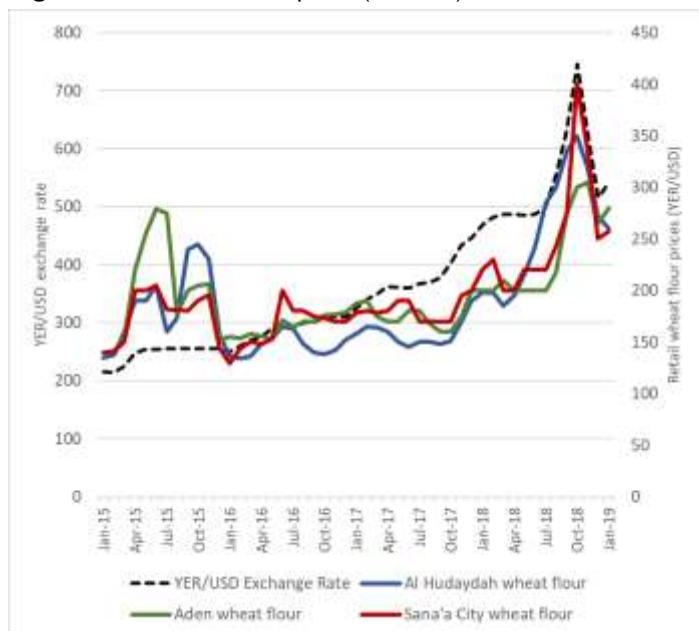
The potential for staple food prices to increase sharply well beyond current levels remains a significant concern. Despite decreases in wheat flour prices in recent weeks, prices of imported staple foods remain subject to changes in the YER/USD exchange rate. Given the inability to generate foreign exchange sufficient to support a stable exchange rate, Yemen faces the prospect of future depreciation of the YER and sharp increases in staple food prices. Should this occur, food access for millions of Yemenis, who are highly reliant on purchases of staple foods to meet their basic needs, would be significantly impacted.

Figure 1. Retail diesel prices (YER/liter), select markets



Source: FEWS NET/WFP/MOPIC

Figure 2. Retail wheat flour prices (YER/liter), select markets



Source: FEWS NET/WFP/MOPIC

Income sources

Many households in Yemen continue to face difficulty accessing typical levels of income, which remains a major constraint on household purchasing power. The World Bank estimates that around eight million people in Yemen have lost their jobs since the war began in 2015. Payment of salaries to public employees continues to be a major challenge in Yemen, although anecdotal reports suggest the regularity of these payments may have improved during the past two to three months in certain areas. According to [International Crisis Group](#), salary payments to military and security services are being prioritized and have increased to both Houthi and recognized-government fighters. Separately, UNICEF has started making payments (50 USD/month) in March 2018 to over 136,000 teachers and school-based staff in Yemen who have not received a salary in over two years. Additionally, field assessments conducted during the second half of 2018 provide broad indications of how households continue to access income:

- In July 2018, a multi-sectoral rapid needs assessment by CARE in Al-MMuallah, Khor-Maksar, Alshaiq Othman, and Dar Sa'ad districts in Aden governorate indicated that casual labor, salaried employment, self-employment, and humanitarian assistance are the main sources of income among households.
- In August 2018, respondents to an assessment by CARE in Hufash and Mehan districts of Al Mahwit governorate indicated that households' main source of income during the 30 days preceding the survey were sale of firewood, sales of livestock, sales of cash crops, and casual labor. However, some interviewees also reported that they did not have any income during the previous 30 days prior to the survey.
- In September 2018, during a vulnerability and needs assessment conducted by Save The Children in Ta'izz and Hajjah governorates (Al-Shaghadera and Bani Qais districts in Hajjah and Maafer and Misrakh districts in Ta'izz), respondents reported that their main incomes before the crisis were salaries, daily labor, agriculture (including qat), remittances, and limited sales of firewood. Now, households are relying on humanitarian assistance, daily labor, and sales of qat and firewood.
- In October 2018, during a multi-sectoral rapid needs assessment conducted by CARE in Al-Sawd, Al-Sawdah, and Jabal Eyal Yazeed districts in Amran governorate, respondents reported that their primary sources of incomes during the 30 days prior to the survey were sale of cash crops, followed by casual labor, humanitarian assistance, and sale of livestock.

Social Welfare Fund-like payments are helping to supplement household income for many poor households. According to UNICEF, the fourth round of payments to Social Welfare Fund (SWF) beneficiaries were conducted between January and February 2019 through a UNICEF/World Bank project that covered approximately 1.5 million former SWF households (approximately 9 million people). These transfers average approximately 15,000 YER per household, which is equivalent to approximately 40 percent of the cost of the monthly minimum food basket (37,483 YER), as estimated by the FAO-Food Security Technical Secretariat (FSTS) in January 2019. These additional cash resources have likely helped to support household purchasing power and food access among some of Yemen's poorest households. According to UNICEF, during previous rounds of cash transfers, approximately nine in ten beneficiaries used transfers to purchase food, while nearly half used the transfers to purchase medicine, and one quarter of beneficiaries used the transfers for debt repayment.

Remittances are a major source of income in Yemen, and new taxes in Saudi Arabia and restrictions on some occupations for foreign workers may negatively impact some households' ability to earn income through remittances. Anecdotal information from currency traders suggests that remittance levels are much higher in late 2018 compared to pre-crisis levels. As such, these remittances likely remain a major source of income for many households in Yemen. However, after imposing additional taxes on all foreign workers and their dependents in 2017, the government of Saudi Arabia began to implement a job Saudization plan in September 2018. This plan seeks to reserve approximately 60,000 jobs for Saudi citizens who would replace expatriate workers. Once fully implemented in 2019, this policy could limit some Yemeni workers' ability to send remittances back to Yemen. According to media, the Ministry of Labor in Saudi Arabia has issued a decision on Saudization of posts in the commercial center markets and civil society employees starting from April 2019. Moreover, the Saudization of the tourist hotel jobs has been announced for July 2019.

Food sources

Market purchases using cash and credit, humanitarian assistance, and reliance on community support remain major sources of food for many households in Yemen. Over the past several months, rapid field assessments have indicated that

households in Yemen continue to purchase food on markets using cash and credit, while continuing to rely on humanitarian assistance and community support in order to try to meet their food needs. Recent field assessments include:

- **Aden, CARE, July 2018:** This multi-sectoral rapid needs assessment in Al-Muallah, Khor-Maksar, Alshaiq Othman, and Dar Sa'ad districts indicated that purchases of food from markets, humanitarian assistance, own production, and borrowing were the main source of food for most households surveyed.
- **Amran, CARE, October 2018:** This multi-sectoral rapid needs assessment in Al-Sawd and Jabal Eyal Yazeed districts indicated that the primary sources of food for most respondents are market purchase, whereas the main source of food in Al-Sawdha district is own production. Overall, a higher proportion of respondents in Al-Sawdha and Jabal Eyal Yazeed reported relying on humanitarian assistance and borrowing, compared to those in Al-Sawd district.
- **Al Mahwit, CARE, August 2018:** Respondents in Hufash and Mehan districts indicated during this assessment that households' main sources of food are borrowing from neighbors and relatives, followed by own production and purchases of food from markets.

Humanitarian assistance

Large-scale humanitarian assistance continues to play an important role in reducing higher levels of food insecurity outcomes. Between October 2018 and January 2019, WFP reached between 7.3 and 9.1 million people per month with emergency food assistance. In 2019, WFP is planning to scale up its assistance to reach 12 million people per month, with plans to reach 10 million people with in-kind food rations and 2 million commodity vouchers.

Humanitarian access constraints are "high" in approximately nine percent of districts in Yemen, while slightly more than one quarter of districts face "medium" access constraints, according to OCHA. Most of these constraints are reportedly related to administrative difficulties such as signing of sub-agreements and approval of humanitarian activities and movements. Armed conflict and insecurity are also affecting humanitarian actors' ability to reach people in need, as are checkpoints that are reportedly a major constraint. Access constraints are worst in Al Hudaydah, Sa'ada, and Hajjah.

Disease outbreaks

The weekly number of suspected cholera cases declined in January and February 2019, following a surge in reported cases starting in July 2018. Starting in July, the caseload began to increase, reaching more than 15,000 cases per week in mid-September. Subsequently, the weekly number of cases continued to approach 15,000 per week through late October 2018. According to the most recent information available from the Electronic Disease Early Warning System's report for February 25 to March 3, 2019, a decline in the number of suspected cases has been observed since late November 2018, with approximately 9,721 cases reported between February 25 and March 3. Although overall the number of suspected cases is concerning, the caseload remains substantially lower than when the cholera outbreak peaked in mid-2017 at more than 50,000 suspected cases in a single week. However, Al Hudaydah, Amran, and Sana'a city are the most effected governorates by cholera outbreak.

Measles cases continue to be reported in Yemen, with the highest numbers of cases reported in 2019 in Dhamar, Sa'ada, Hajjah, and Amanat Al Asimah governorates. Between January 1 and February 24, 2019, the caseload reached approximately 4,807 cases, which is 77 percent and 305 percent higher than the same time in 2018 and 2017, respectively. According to UNICEF, the number of suspected measles cases ranged between 2,000 and 4,000 cases per year between 2013 and 2017. As of February 21, 2019, WHO and UNICEF in collaboration with local health authorities have vaccinated more than 11.6 million children aged 6 months and 16 years across the country against measles and rubella, covering about 90 percent of the target children.

Between January 1 and February 24, 2019, approximately 4,183 cases of dengue fever were reported nationwide, more than one-third of which were in Al Hudaydah governorate, with another 1,064 suspected cases reported in Aden governorate. The weekly number of suspected cases peaked in early to mid-September, when nearly 1,200 cases were reported in a single week.

Approximately 900 suspected cases of H1N1 were reported in Yemen between early January and March 3, 2019, in 18 governorates across the country. According to the Electronic Disease Early Warning System, the worst-affected governorates include Amanat Al Asimah, Amran, Sa'ada, and Ibb.

Current food security and nutrition outcomes

FEWS NET estimates that approximately 17 million people in Yemen would be in need of urgent action (IPC Phase 3 or higher) in the absence of ongoing humanitarian assistance. 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, the reduced Coping Strategies Index, Household Hunger Scale, and a Livelihoods Coping module. Separately, multiple SMART surveys in 2018 collected anthropometric data on children aged 6 to 59 months, and in some cases mortality data was collected. In general, the data suggest large numbers of people in Yemen were facing moderate to large food consumption gaps or were engaging in negative and irreversible livelihoods-based coping strategies in order to try to meet their food needs. In the absence of assistance, approximately 17 million people would be facing Crisis (IPC Phase 3) outcomes or worse.

Overall, staple food prices have declined from levels observed in late 2018, although household access to adequate and stable levels of income remain very limited. In addition, emergency food assistance continues to reach more than 7 million people each month, although due to community sharing and other issues, it is likely that assistance is impacting food security outcomes differently among households who receive assistance. Likewise, assistance is not necessarily in all cases reaching those in greatest need. Moreover, given that needs are significantly greater than current assistance programming, sustained improvements in security and significant additional assistance is needed to help protect food consumption and improve food security outcomes for millions of people in Yemen. Acute food insecurity is classified as Emergency (IPC Phase 4) in Sa'ada and Hajjah governorates, while the remaining 20 governorates are facing Crisis-level outcomes. Of those classified in Crisis, six would likely be in Emergency in the absence of ongoing emergency food assistance and are thus classified in Crisis (IPC Phase 3!).

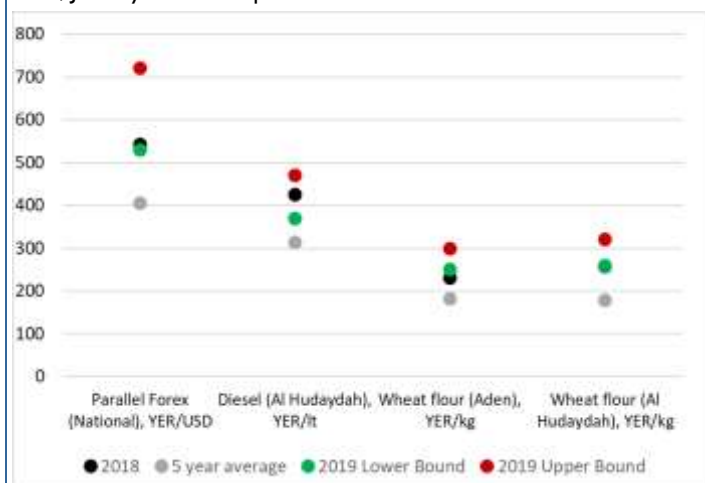
Assumptions

The most likely scenario for the February 2019 to September 2019 period is based on the following national-level assumptions:

- **Conflict:** For the purposes of this scenario, FEWS NET assumes that conflict will continue similar to levels observed during early 2019 and will drive increases in displacement through at least September 2019. Should major parties to the conflict achieve a lasting ceasefire that improves security, livelihood and economic activities could begin to return to normal in the medium term.
- **Economy:** For the most likely scenario, FEWS NET assumes that the current macroeconomic crisis will continue. More specifically:
 - **Central Bank:** The Central Bank's current split in management will continue. The Central Bank will not receive any additional major funding from external donors and will not provide credit to the private sector for food importation during the scenario period. However, the Central Bank in Aden will continue to provide a preferential exchange rate of 440 YER/USD to traders to support imports of key staple food commodities.
 - **Oil exports:** Oil exports will not return to pre-conflict levels during the scenario period.
 - **Foreign reserves:** Despite large deposits of U.S. currency by Saudi Arabia in the Central Bank of Aden in October 2018, Yemen's foreign reserves within the country will continue to decline compared to current levels, given the assumptions of significantly reduced oil exports and no additional funding from external donors.
 - **Exchange rate:** Given the decline in foreign reserves and limited government revenues, the Yemeni Rial will continue to depreciate against foreign currencies due to the inability of the two central banks to intervene due to operational constraints and the shortage of hard currency.

- **Liquidity constraints:** Liquidity constraints at banks within Yemen will continue to worsen and will limit general economic activities and complicate import activities.
- **Imports:** Cargo will continue arriving into Al Hudaydah, Salif, Aden, and Al Mukalla ports. Cargo arriving into Al Mokha will remain limited. While large traders will continue to find alternative methods of accessing foreign currency to continue operations, import levels will likely remain volatile and transaction costs associated with these imports will increase. Informal food flows across land borders will also continue at status quo levels, but their transport into the western areas of Yemen will remain difficult due to civil insecurity and difficult market access. However, the financial crisis within the Central Banks of Yemen, and the shortage of foreign currency and accessing lines of credit through private sources, will likely increase the difficulties and make it costly for the private sector to continue food imports into the country. FEWS NET is assuming, however, that the average quantity of food imported from the Red Sea and Aden ports will continue at slightly to moderately below-average levels, whereas the quantity of imported fuel will meet less than two-thirds of monthly requirements.
- **Government salaries and the Social Welfare Fund:** Many government employees will continue not to receive regular salaries or pensions due to the Central Banks' lack of adequate financial resources. In addition, at least one round of Social Welfare Fund-like payments is expected during the scenario period.
- **Internal trade flows:** Active fighting, damaged transportation infrastructure, high fuel prices, and additional security and transaction costs (e.g., commissions at checkpoints), will continue to complicate trade flows within the country. Moreover, the transport of commodities to Sana'a City and other neighboring governorates from Al Hudaydah ports will also be difficult due to the road access constraints along the main highway between Al Hudaydah and Sana'a governorate. However, in the absence of additional information about the evolution of conflict, FEWS NET assumes that areas where trade flows will be particularly constrained will be the same areas where roads are currently closed, as shown by the Logistics Cluster's most recent access constraints [map](#).
- **Market demand:** Demand from consumers will remain atypically low during the scenario period due to weak household purchasing power caused by below-average incomes, high levels of debt, and well above-average prices for essential commodities. However, purchasing power may improve temporarily at times during the scenario period as households receive erratic salary payments and/or cash transfers.
- **Fuel prices:** Given a tightening of supply due to fuel imports well below national requirements, continued conflict, persistent currency depreciation, and increased transaction costs for imports and transportation, between February 2019 and September 2019, diesel prices in Al Hudaydah are likely to be near 2018 levels, and between 20 and 50 percent higher than the recent five-year average.
- **Wheat flour prices:** Retail wheat flour prices in Al Hudaydah will likely be above average and slightly higher than in 2018, due largely to the direct impacts of currency depreciation on imports and indirect impacts on staple food prices via increasing fuel prices (Figure 3). For the purposes of this scenario, FEWS NET assumes retail wheat flour prices will increase to between 260 and 320 YER/kg by September 2019 and will be 50 to 80 percent above average. Retail wheat flour prices in Aden are expected to range between 250 and 300 YER/kg and will be approximately 40 to 65 percent above average. As most consumption markets rely on supply from these two markets, prices in other areas of the country will likely follow trends like those in Aden and Al Hudaydah. However, in markets where prices have been particularly

Figure 3. Projected Yemeni Rial (YER) to U.S. Dollar (USD) exchange rate, January 2019 to September 2019



Source: FEWS NET

volatile due to conflict-related disruptions to trade, such as in Ta'izz, prices will likely be more volatile and sharper increases are possible.

- **Agricultural production:** The seasonality of agricultural production varies depending on the zone in Yemen. In the western and central wadi zone, vegetable harvesting will take place between January and August 2019, while fruit harvesting will start in May, and banana and papaya harvesting will continue until December in the YE-07: Greater Yemen Coastal Livelihood Zone. Cereals will be harvested between February and July 2019. The first rainy season (March to May) is expected to be average in terms of total cumulative rainfall. However, production will likely be below average due to a lack of availability and/or access to inputs and limited access to fields in conflict zones. Related agricultural labor opportunities will also be atypically low. Qat production, however, will continue to be generally average. The locust situation is expected to remain calm throughout the scenario period.
- **Remittances:** Although the remittances have increased during the crisis and remittance service offices will remain open in most urban areas, significant difficulties (e.g., delays, closed offices, lack of liquidity, new taxes, and Saudization policies) will limit the ability of some households to receive remittances from abroad. Overall, remittances are likely to be higher than prior to the ongoing crisis, but for households worst affected by labor policies in Saudi Arabia, income from remittances will be well below normal.
- **Fishing:** Fishing activities along the Red Sea and Gulf of Aden coasts will increase seasonally starting in March/April, but will remain well below average due to reduced fishing assets, high fuel prices, and civil insecurity, especially in the western coastal areas.
- **Livestock sales:** Reduced livestock assets caused by several years of food insecurity, livestock parasites, and disease will limit household income from this source. Therefore, the income from livestock sales will likely be below average during the scenario period. In addition, given high staple food prices with low purchasing power that expected during the scenario period, livestock-to-cereal terms of trade will also likely be below average. On the other hand, livestock prices most likely will increase during June and August due to the Eid holidays.
- **Incomes from other sources:** The deteriorating macroeconomic situation and conflict will disrupt household livelihoods across much of the country, resulting in below-average household incomes. The largest declines in incomes will be among IDP populations and households residing in intense conflict zones, such as Ta'izz, Al Hudaydah, Sa'ada, Al Bayda, coastal Hajar, and eastern Sana'a (Nehim district) and Ad'Dali (Demt district).
- **Cholera and diphtheria:** Ongoing fuel shortages will continue to limit the availability of clean water, as well as the functioning and delivery of vaccines and medical supplies to health centers and hospitals around the country. As a result, the spread of cholera, diphtheria, and other diseases is expected to continue through the scenario period.
- **Humanitarian assistance:** FEWS NET assumes that humanitarian partners will continue providing in-kind assistance through September 2019. For the purposes of this scenario, FEWS NET assumes humanitarian partners will continue to provide assistance at levels similar to those over the past six months. Given plans to begin scaling up assistance in 2019, it is possible humanitarian assistance will increase throughout the scenario period. However, inter-household sharing, poor road access, and increased transportation costs are likely to limit the impact of assistance on food security outcomes in some cases.

Most Likely Food Security Outcomes

The ongoing food security emergency in western Yemen is likely to continue to drive very high assistance needs through at least September 2019. The poor macroeconomic situation and the persistence of conflict will continue to disrupt household livelihoods, limiting purchasing power, and access to food. While harvests during the scenario period will provide some rural households with small food stocks, these stocks are not expected to have major impacts on food security outcomes given the small-scale nature of agricultural production in Yemen and the fact that these harvests will be below average. Household food access will likely further be constrained by higher than usual food prices.

Under the most likely scenario for February 2019 to June 2019, most areas of western Yemen will be in Crisis (IPC Phase 3) or would be at least one IPC Phase worse in the absence of humanitarian food assistance and will therefore be classified in Crisis (IPC Phase 3!). FEWS NET estimates 17 million people are likely to require emergency food assistance each month, many of whom would face food consumption gaps large enough to lead to increases in human mortality in the absence of assistance and are likely to be in Emergency (IPC Phase 4). Although humanitarian assistance is expected to continue through June and beyond, the number of people in need will significantly exceed the number receiving 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, depending on access to labor markets, support from the host community, access to humanitarian aid, and the functioning of local markets. Moreover, the conflict situation is fluid and could result in changes to expected outcomes. However, in the areas most isolated and cut-off from trade by the conflict, many of the displaced are likely to enter or to remain in Crisis (IPC Phase 3) or Emergency (IPC Phase 4) through at least May 2019. Even in the absence of additional disruptions, additional populations may begin to move into Catastrophe (IPC Phase 5) as worst-affected households begin to exhaust their coping capacity.

Under the most likely scenario for June to September 2019, humanitarian food assistance will continue and large areas will remain in Crisis (IPC Phase 3) through September 2019, while Hajjah and Sa'ada remain in Emergency (IPC Phase 4). As humanitarian food assistance is expected to continue protecting food consumption for many food assistance beneficiaries through late 2019, many areas of western Yemen areas are expected to remain in Crisis (IPC Phase 3!). Despite ongoing assistance, Hajjah and Sa'ada are expected to remain in Emergency (IPC Phase 4), while food security in Al Mahrah will be Stressed (IPC Phase 2).

In a worst-case scenario, significant declines in commercial imports far below requirement levels and conflict that cuts populations off from trade would likely drive food security outcomes in line with Famine (IPC Phase 5). Military operations, to the extent they occur, increase the risk that key port facilities will be damaged, or that trade from the ports to urban areas of the country will be cut off for a prolonged period. In FEWS NET's analysis, these events would likely lead to Famine (IPC Phase 5) in Yemen. The areas where Famine (IPC Phase 5) would be likely to develop most quickly include areas more highly dependent on imports through Al Hudaydah and Salif, particularly those with intensive conflict and high numbers of IDPs, such as Hajjah, Sa'ada, and Ta'izz. In addition, many of the millions who receive humanitarian food assistance imported through the Red Sea ports would begin to face more immediate and substantial food consumption gaps as stock shortages begin to limit assistance delivery. Even for areas that can access imports from Aden, a risk of Famine (IPC Phase 5) would persist given the already severe levels of acute food insecurity that would be exacerbated by the increased competition for available goods. Second, given very low levels of foreign exchange in country, well below-normal oil revenues, and continued conflict, FEWS NET expects the depreciation of the Yemeni Rial to continue. This could result in further price shocks for essential commodities, increasing the risk of Famine (IPC Phase 5) even in the absence of the physical limitations on imports described above. Additionally, should assistance in 2019 fail to materialize, it is likely that a large number of the more than 7 million people who receive 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 to overall supply of food in Yemen, the absence of this assistance could lead to wider price impacts 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. Areas of northwestern Yemen, particularly Sa'ada and Hajjah, would face an increased risk of Famine (IPC Phase 5) as the number of households in Catastrophe increases.

AREAS OF CONCERN

Al Hudaydah Governorate (Figure 4)

Current Situation

Conflict and displacement

Conflict has continued in Al Hudaydah governorate despite the ceasefire signed in December 2018. According to OCHA, airstrikes continue to occur sporadically in several areas, including in Al Mina, Bajil, Al Sukhnah, Ad Durayhimi, and At Tuhayat districts. Intermittent armed clashes and artillery exchanges have also continued in and around Al Hudaydah City, while both sides reportedly continue to reinforce their respective positions around the city.

The reported number of IDPs in Al Hudaydah has more than doubled since June 2018. The most recent data from the Task Force on Population Movement (TFPM) collected in November 2018 estimates approximately 362,000 IDPs are in Al Hudaydah governorate. This is more than double the number of IDPs (approximately 133,830 people) the TFPM reported in June 2018.

Trade, markets, and prices

Al Hudaydah and Salif ports remain open and accessible to traders in early March. According to field reports, the main Al Hudaydah-Sana’a road continues to be closed due to insecurity, and the only remaining road out of Al-Hudaydah to Sana’a is the road to Hajjah, to the north of the city. This road is also used by humanitarian organizations for the movement of humanitarian staff and cargo. This route is longer than the normal route to Sana’a.

The availability of wheat flour, red beans, and sugar in Al Hudaydah improved in January 2019 compared to the three prior months. According to WFP, the availability of wheat flour has improved in January 2019 to “available” (the first of five rankings) compared to “widely available” (the second highest of five rankings) in December 2018, and “sparsely available” (the third of five rankings) in November 2018 and the three previous months.

Wheat flour prices increased slightly in February 2019, following declines between October 2018 and January 2019. Initial data from February 2019 suggest wheat flour prices increased slightly, following a nearly 25 percent decline between October and January 2019. Improvements in staple food prices were reportedly due to improvements in the YER/USD exchange rate, following substantial deposits of foreign exchange in the Central Bank, and favorable exchange rates provided to importers of staple foods. Retail wheat prices are currently as much as 86 percent above pre-conflict levels.

Diesel, gasoline, and cooking fuel remained “sparsely available” in Al Hudaydah, with prices well above pre-crisis levels as of January 2019. According to the January 2019 Yemen Market Watch Report, diesel, gasoline, and cooking fuel were “sparsely available,” consistent with reporting over the prior six months. Gasoline prices decreased by 6 percent between December 2018 and January 2019, while diesel prices decreased 10 percent compared to December 2018. Gasoline and diesel prices are approximately 3 and 7 percent higher than at the same time in 2018. Data collected in Al Hudaydah City between in February 2019 suggest that diesel prices decreased by 11 percent compared to January 2019, while petrol prices decreased by 7 percent compared to January 2019.

Household livelihoods and incomes

Household income is likely significantly below levels typically earned prior to the start of conflict in March 2015. In recent weeks, the recognized government announced the paying of full salaries for January and February 2019 to all civil government

Figure 4. Reference Map for Al Hudaydah Governorate



Source: FEWS NET

workers in Al Hudaydah governorate for the first time in over two years. Prior to this, teachers in only six districts (Al Duryhimi, Hays, Al Tuhaytah, Al Hawak, Al Mina, and Al Khawkh districts) received their salaries during the August-November period. Meanwhile, according to WFP, the daily wage rate for skilled laborers has declined in recent months from approximately 6,000 YER/day in mid-2017 to 5,000 YER/day in April 2018, and then to 4,000 YER/day between May 2019 and January 2019. However, WFP reports the daily wage rate for unskilled laborers has remained constant at 3,000 YER/day between July 2016 and September 2018, with an increase to 3,500 YER/day between November 2018 and January 2019.

Field reports indicate casual labor, agriculture, government salaries, and humanitarian assistance continue to be important sources of income in Al Hudaydah governorate. Partner reports indicate that casual labor is a major source of income for many households, although these opportunities are limited and difficult to find. Farming and agriculture, self-employment, government employment, and fishing are also sources of income. Some household respondents in partner field visits reported incomes as low as 30,000 YER/month, substantially less than the estimated 48,000 YER/month needed to afford the minimum food basket. Households also reported owing debts incurred in the past in order to pay for food and medical expenses.

UNICEF is continuing to provide significant cash transfers to poor households through World Bank-funded Social Welfare Fund-like payments. Between January and February 2019, UNICEF conducted a fourth round of cash transfers to approximately 144,000 households, or approximately 800,000 people, in Al Hudaydah governorate. At these levels, approximately 25 to 30 percent of the population of Al Hudaydah governorate would be receiving cash transfers. These transfers average approximately 15,000 YER per household, which is equivalent to approximately 40 percent of the cost of the minimum food basket (37,483 YER), as estimated by the FAO-FSTS in January, likely helping to support purchasing power among a large portion of the governorate population.

Humanitarian assistance

Large-scale assistance continues to reach nearly 20 percent of the population in Al Hudaydah governorate. According to the FSAC, approximately 822,308 people in Al Hudaydah received emergency food assistance in November 2018, out of a target population of 899,030 people. Between January and November 2018, WFP reached approximately 691,000 beneficiaries per month with general food distributions and commodity vouchers. OCHA indicated that for the first time since June 2018, WFP managed in January to provide humanitarian assistance in Al Tuhayta and Ad Durayhimi districts. In January WFP reached 8,125 households in Al Tuhayat and 2,662 households in Al Darayhimi. OCHA also reported that over the past six months, 996,600 individuals in Al Hudaydah displaced by conflict have received one-time assistance in the form of ready-to-eat food, hygiene kits, and dignity kits. Partner reports indicate that humanitarian access in Al Hudaydah remains very difficult, with high access constraints reported in three districts (Ad Durayhimi, Al Saleef, and Kammaran). As of January 2019, these high access constraints were reportedly due to administrative constraints, restrictions on movement, and armed conflict.

Disease outbreaks

Continued disease outbreaks remain concerning in Al Hudaydah governorate. The number of cholera cases reported in Al Hudaydah governorate remained stable in late 2018. According to WHO data, Al Hudaydah had the highest number of suspected cholera cases at more than 72,878 between January 1, 2018 and March 4, 2019. In addition, approximately 170 suspected measles cases were reported in Al Hudaydah between January 1 and February 24, 2019, after approximately 400 suspected cases were reported in 2018, according to the WHO Weekly Epidemiological Bulletin. Between mid-2017 and March 4, 2019, there have also been approximately 460 suspected cases of diphtheria, and 36 deaths associated with suspected cases. In addition, Al Hudaydah is among the governorates worst affected by an ongoing dengue fever outbreak. Between January 1 and February 24, 2019, approximately 1,466 suspected cases of dengue fever were reported, after approximately 8,737 suspected cases were reported in 2018.

Food security indicator data

Data collected in late 2018 on food consumption and coping strategies indicated severe levels of food insecurity outcomes in Al Hudaydah. According to Food Consumption Score, more than one in five households had “borderline” food consumption, while more than 40 percent of households engaged in “severe” levels of consumption-based coping strategies during the 30 days prior to data collection. According to Household Hunger Scale, a small percentage of households faced “severe” hunger, and approximately 20 percent of households engage in “emergency” levels of livelihoods coping.

In Al Hudaydah governorate, WFP mVAM¹ data indicate the proportion of households with “poor” food consumption increased between November 2018 and January 2019. Between March 2018 and October 2018, the proportion of households surveyed in Al Hudaydah with “poor” food consumption, according to Food Consumption Score, ranged between 2 and 11 percent, then increased to 12 percent in November 2018, and to 16 percent in January 2019. Meanwhile, the mean and median reduced Coping Strategies Index has remained generally stable in recent months.

Current food security outcomes

Based on available information on food security outcomes and contributing factor information on food availability and household food access, FEWS NET estimates that poor households in most areas of Al Hudaydah are likely facing elevated levels of food insecurity, including food consumption gaps, in line with Crisis (IPC Phase 3!) food insecurity. In the absence of assistance, food security in Al Hudaydah governorate would likely deteriorate to Emergency (IPC Phase 4). Given variations in conflict levels and humanitarian access, it is likely that geographic variations in food security outcomes exist throughout the governorate. More specifically, IDPs throughout the governorate and households in conflict zones in southern and western districts are facing the most severe food security outcomes.

Assumptions

- **Conflict:** For the purposes of this scenario, FEWS NET assumes that conflict will continue at recent levels and will continue to constrain road access to markets in the southern and western coastal areas, including Al Hudaydah City, as well as the main route between Al Hudaydah and Sana’a governorate.
- **IDP populations:** IDP populations are likely to increase due to conflict and insecurity in southern and western coastal areas and in Al Hudaydah City.
- **Staple food prices:** Retail wheat flour prices in Al Hudaydah will likely be above average and slightly higher than in 2018, due largely to the direct impacts of currency depreciation on imports and indirect impacts on staple food prices via increasing fuel prices. For the purposes of this scenario, FEWS NET assumes retail wheat flour prices will increase to between 260 and 320 YER/kg by September 2019 and will be 50 to 80 percent above average.
- **Agricultural production/labor:** Land preparation and planting of sorghum and millet will take place between April and May, which will be harvested in June and July in YE-11 and YE-14 livelihood zones. Vegetable harvests underway since October 2018 will continue until March 2019. Fruit harvests underway since January 2019 will continue into May, with exception of banana and papaya which will be harvested throughout the year. Agricultural labor income will increase in these livelihood zones during this period but will likely be below-normal levels.
- **Livestock and livestock products:** Among rural populations, sales of livestock are likely to continue throughout the outlook period, peaking during the holidays in June and August. However, sales will be lower than typical levels and terms of trade are likely to remain below average due to high staple food prices. Milk production will take place between March and October in most areas in YE-11 and YE-14 livelihood zones, with a seasonal decline in June.
- **Fishing:** Fishing activities in coastal areas of Al Hudaydah will remain limited due to ongoing insecurity.

Most Likely Food Security Outcomes

No significant improvements to food security conditions are expected in Al Hudaydah as conflict continues. IDP populations and those residing in southern and western conflict-affected areas are likely to continue to face more severe outcomes. Even in the absence of additional disruptions, some affected populations are expected to face greater difficulty meeting their basic food needs as they begin to exhaust their coping capacity. The number of households facing Crisis (IPC Phase 3) or worse outcomes is likely to increase, particularly among those IDPs who are unable to access their typical sources of food and income and who do not receive assistance. Between February and September 2019, Al Hudaydah is expected to remain in Crisis (IPC Phase 3!) in the presence of ongoing humanitarian food assistance, even as some populations in the governorate face Emergency (IPC Phase 4) or worse outcomes.

¹ Please note that cell phone-based surveys are likely biased towards better-off and urban populations who have access to cell phones. These biases should be kept in mind when comparing these survey results with in-person representative household surveys conducted prior to the conflict.

Hajjah Governorate (Figure 5)

Current Situation

Conflict and displacement

Conflict in Hajjah has increased since the ceasefire agreement took effect in December 2018. According to the International Crisis Group, the areas where conflict has been most active have shifted to northern governorates, particularly Hajjah. Since January 2019, tensions have grown between the Houthis and the Haugor tribe in Kusher District (25 km east of Haradh). Conflict in Hajjah has been particularly active around the Saudi border in Medi, and Haradh, close to the main border crossing in Al Tuwal.

Approximately 420,000 IDPs are located in Hajjah governorate, according to OCHA. In early March 2019, OCHA reported that approximately 420,000 IDPs are in Hajjah governorate, following reporting from the IOM Displacement Tracking Matrix estimating the number of IDPs in Hajjah at approximately 374,820 in November 2018. According to OCHA, IDPs are scattered in more than 300 settlements in different districts.

Trade flows

Hajjah is one of the governorates with the highest access constraints in Yemen. The Yemen Logistics Cluster Access Constraints Map from January 24, 2019 indicates that all routes between Hayran, Midi, Haradh, Mustaba, and Kusher districts are closed. Meanwhile, the roads linking Hajjah to Al Hudaydah and Sana'a remain open, whereas roads from Hajjah to Amran governorate are difficult to access. The border crossing linking Hajjah to Saudi Arabia in Haradh Al Tuwal has been closed since July 2015 due to military activities.

Staple food and fuel prices

WFP reports that basic food commodities remained “available” in Hajjah governorate in January 2019. According to the most recent WFP Market Watch Report for January 2019, wheat flour was “available” (the highest of five rankings), consistent with reporting over the prior six months. The same trend has been observed for vegetable oil, red beans, and sugar. On the other hand, cooking gas, diesel, and petrol remained only “sparsely available,” as they have been in recent months.

Wheat flour prices increased in January and remained higher compared to the last six months and pre-crisis levels. According to WFP price reporting, retail wheat flour prices in Hajjah were 300 YER/kg in January 2019, which is about 119 percent higher than pre-conflict levels and 30 percent higher than the 2018 monthly average prices.

Diesel, gasoline, and cooking fuel were “sparsely available” in Hajjah, with prices remaining well above pre-crisis levels in January 2019. According to WFP, diesel, gasoline, and cooking fuel were all “sparsely available” in Hajjah in January 2019, which is consistent with reporting for most governorates in the country over the prior six months. According to WFP price data, diesel, and gasoline prices decreased by 11 and 12 percent between December 2018 and January 2019, respectively, while they were higher by 173 and 132 percent compared to pre-crisis levels.

Household livelihoods and incomes

The main sources of income in rural Hajjah have traditionally been crop production (grains, qat, and vegetables) and livestock keeping, but production is likely to remain constrained. According to the Ministry of Agriculture, agricultural production has been well below normal in 2016 and 2017, with key drivers (particularly high fuel prices) likely currently constraining agricultural production in 2019.

Figure 5. Reference Map for Al Hudaydah Governorate



Source: FEWS NET

Many households in Hajjah continue to face difficulty accessing typical levels of income, which remains a major constraint on household purchasing power. Payment of salaries to public employees continues to be a major challenge in Yemen, including in Hajjah governorate. Salaries for government employees have been irregular for more than two years. Additionally, field assessments conducted during the second half of 2018 provide broad indications of how households continue to access income:

- In September 2018, a multi-sectoral rapid needs assessment by CARE in Khayran Al-Muharq, Kuhlan Ash Sharaf, Aflah Al Yemen, and Aflah Ash Sham districts in Hajjah governorate indicated that humanitarian assistance, casual labor, sale of cash crops, and sales of livestock were the primary sources of income for most survey participants during the 30 days before the assessment. Surveyed households also reported borrowing, begging, and gifts/donations as important sources of food.
- In October 2018, Save The Children conducted an end-line assessment in Bani Qa'is and Kuidenah districts in Hajjah governorate among direct beneficiary households who were supported with food baskets. Surveyed households reported casual labor, farming and agriculture, working on motorcycles, working abroad, and government salaries as the main sources of income. The households indicated that the average monthly income (overall) was 30,000 YER. Moreover, about 20 percent of the interviewed reported owing debts averaging an estimated 22,000 YER. Of those in debt, 90 percent reported it was due to having taken loans to buy food while the other 10 percent reported using the money to pay medical expenses.

UNICEF is continuing to provide significant cash transfers to poor households through World Bank-funded Social Welfare Fund-like payments. Between January and February 2019, UNICEF conducted a fourth round of cash transfers to approximately 141,000 households, or approximately 800,000 people, in Hajjah governorate. At these levels, approximately 30 to 35 percent of the population of Hajjah governorate would be receiving cash transfers. These transfers average approximately 15,000 YER per household, which is equivalent to approximately 40 percent of the cost of the minimum food basket (37,483 YER), as estimated by the FAO-FSTS in January 2019.

Humanitarian assistance

Approximately one-third to half of the total population in Hajjah governorate receives humanitarian food assistance each month. In January 2019, WFP started increasing provision of emergency food assistance to reach approximately 1.3 million people in Hajjah governorate on a monthly basis. This represents a significant scale-up compared to late 2017, when between on average 871,000 beneficiaries received emergency food assistance each month. WFP assistance in these areas targets two-thirds to a full ration. Although some sharing likely occurs, it is likely that emergency food assistance is helping to provide recipient households with a significant portion of their food needs.

Five districts in Hajjah governorate (Midi, Haradh, Bakil Al Mir, H Mustaba, and Hayran) face high access constraints, according to OCHA reporting from January 2019. Approximately 329,137 people (according to 2019 population estimates) live in these areas, which represents about 14 percent of the population in the governorate. These access constraints are reportedly mostly related to administrative difficulties, such as the approval of humanitarian activities and movements, and signing of sub-agreements with the Government.

Food security and nutrition indicator data

Data collected by partners on food consumption and coping strategies in Yemen suggest outcomes in Hajjah are very concerning. According to Food Consumption Score, more than one in five households have “poor” food consumption, while approximately two-thirds of households engaged in severe levels of consumption-based coping strategies during the 30 days prior to data collection. According to the Household Hunger Scale, more than 20 percent of households faced “severe” hunger, and more than 20 percent of households engage in “emergency” levels of livelihoods coping.

Between November 2018 and January 2019, WFP’s mVAM² surveys indicated that, on average, about 8 percent of respondents in Hajjah had “poor” food consumption, with an additional 27 percent reporting “borderline” food consumption. Moreover, mVAM data suggested that the average percentage of households with “poor” food consumption

² Please note that cell phone-based surveys are likely biased towards better-off and urban populations who have access to cell phones. These biases should be kept in mind when comparing these survey results with in-person representative household surveys conducted prior to the conflict.

deceased between November 2018 and January 2019 by more than 10 percent compared to the six months prior and has improved by one-third compared to 2018. During the same period, the median Reduced Coping Strategies Index of the respondents has remained generally stable.

The typical level of global acute malnutrition (GAM) in Hajjah is Critical (15–30 percent) in the Lowlands and Alert in the Highlands (5–9.9 percent). The latest available information on GAM levels is from the SMART survey conducted in March 2018. Based on its findings, GAM prevalence in Hajjah based on weight-for-height was 14.9 percent (CI: 11.8–18.8) in the Lowlands and 8.9 percent (CI: 6.5–12.1) in the Highlands. This prevalence is not significantly different from that of the SMART survey conducted in September 2015 (although that survey was conducted in a different season) or from historical pre-conflict levels based on surveys conducted in the same season. High wasting levels are attributable to a high prevalence of morbidity, poor infant and young child feeding practices, and poor food consumption, and are linked to the households' inability to purchase both adequate amounts of food as well as diverse enough foods to meet basic nutritional needs, which has been exacerbated by conflict.

Severe livelihood coping strategies continue to be reported in Hajjah governorate. According to July and October 2018 end-line assessments conducted by Save the Children in Abs and Bani Qais and Kuidenah districts in Hajjah governorate, households reported relying on less preferred and less expensive foods, borrowing food, and relying on help from a friend or relative. In September 2018, CARE conducted interviews in Khayran Al-Muharq, Kuhlun Ash Sharaf, Aflah Al Yemen, and Aflah Ash Sham districts in Hajjah governorate, where households reported relying on less preferred and expensive food, borrowing food, relying on help from friends or relatives, limiting portion sizes at meals, restricting consumption by adults in order for small children to eat, and reducing the number of meals eaten in a day.

Disease outbreaks

Hajjah has the fifth highest level of suspected cholera cases compared to other governorates, with 141,516 cases reported between late April 2017 and early March 2019. Hajjah governorate also has one of the highest case fatality rates at 0.3 percent. Cases of measles and diphtheria are also reported in Hajjah. The number of probable cases of diphtheria as of March 4, 2019 was 473, the second highest in the country, after Ibb governorate. Measles cases are also reported in Hajjah, with approximately 450 suspected cases reported between January 1 and February 24, 2019. In addition, approximately 38 cases of dengue fever were reported in Hajjah between January and February 24, 2019.

Current food security outcomes

Based on available information on food security outcomes and contributing factor information on household food availability and access, FEWS NET estimates that at least one in five households in most areas of Hajjah are likely facing elevated levels of food insecurity, including food consumption gaps, in line with Emergency (IPC Phase 4) food insecurity. This is even in the presence of humanitarian food assistance, which is helping protect food consumption among some populations who may otherwise be in Emergency (IPC Phase 4) or worse. Given variations in conflict levels and humanitarian access, it is likely that geographic variations in food security outcomes exist throughout the governorate. More specifically, IDPs throughout the governorate, and poor households in lowland areas, where malnutrition rates have historically been high, are likely facing more severe outcomes than households in highland areas.

Assumptions

- **Conflict:** During the scenario period, FEWS NET assumes that conflict will continue in western areas as well as Kuser district.
- **IDP populations:** IDP populations are likely to increase as military operations continue.
- **Agricultural production/labor:** Land preparation and planting activities of sorghum and millet will take place between April and May to be harvested between June and September, whereas wheat will be harvested between August and October, especially in YE1 livelihood zone. Vegetable harvesting, which has been underway since October, will continue until March 2019. Fruit will be harvested through May. On the other hand, in YE-13 livelihood zone, qat will be harvested between February to August, except in April. Agricultural labor income will increase in these livelihood zones during this period but will likely be below normal levels.

- **Livestock and livestock products:** Among rural populations, sales of livestock are likely to continue throughout the outlook period. Livestock sales will increase between June and August due to the Muslim holidays and prices are expected to increase, but selling livestock will be below average compared to what is typical for the season, due to the consumer income and demand. Milk production will take place between March and November, although there is no milk production between June and July.
- **Market supply levels:** Food will likely remain available in Hajjah governorate, although fuel will likely continue to be sparsely available.
- **Staple food prices:** Wheat flour prices are likely to remain much higher than normal, due to continued increases in prices at key import markets, as well as expected increases in transportation costs due to increases in fuel prices.

Most Likely Food Security Outcomes

Between February and September 2019, Hajjah governorate is likely to be in Emergency (IPC Phase 4). Humanitarian food assistance is expected to continue to be delivered in Hajjah governorate through September 2019, but at least one in five households are expected to remain in Emergency (IPC Phase 4) between now and September. As a result, Hajjah governorate will remain in Emergency (IPC Phase 4) through September 2019. However, should assistance fail to materialize nationwide, FEWS NET expects that staple food prices would likely increase further. This, coupled with the absence of food assistance to protect food consumption at the household level, would likely drive increases in the number of households in Emergency (IPC Phase 4). Moreover, it is likely that the size of the population in Catastrophe (IPC Phase 5) would increase and Hajjah would face a risk of Famine (IPC Phase 5). IDP populations would continue to face some of the more severe outcomes.

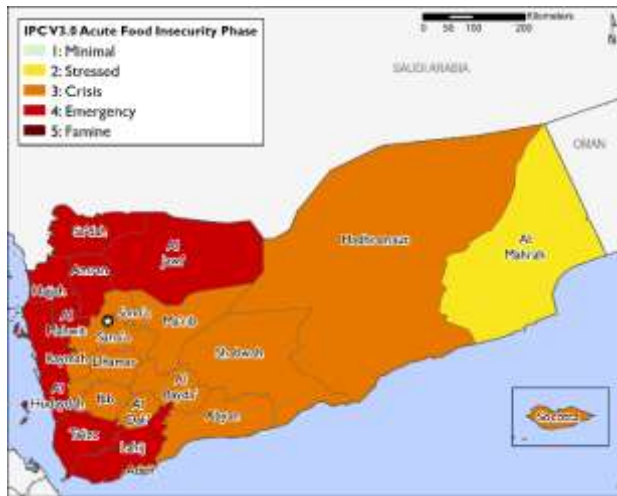
EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table I. 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 the normalization of livelihood and economic activities.	Food access for many households would likely begin to improve as prices of staple food commodities begin to decline and household access to food and income begins to return to normal. In addition, IDPs would likely begin to return to their areas of origin. However, additional time would likely be required before the macroeconomy fully stabilizes and major government functions resume in full.
National	The Yemen Central Bank receives external assistance to replenish its depleted reserves or it gains access to its foreign reserves currently frozen in overseas accounts.	The Yemeni Rial to US dollar exchange rate would become more stable and the Central Bank would start supporting wheat flour importers again through lines of credit. Import levels, local food availability, and food prices would begin to stabilize. In addition, government salaries, pensions, and social welfare would be paid, increasing household purchasing power and improving food security outcomes.
National	Food imports stop due to closure of main ports, destruction of key port infrastructure, or major macroeconomic changes that prevent traders from funding imports.	Food availability on local markets would quickly decline and food security outcomes would likely worsen with areas likely to deteriorate to Famine (IPC Phase 5) in a worst-case scenario.
National	Increased humanitarian assistance.	Additional humanitarian assistance could further protect food consumption and reduce malnutrition.

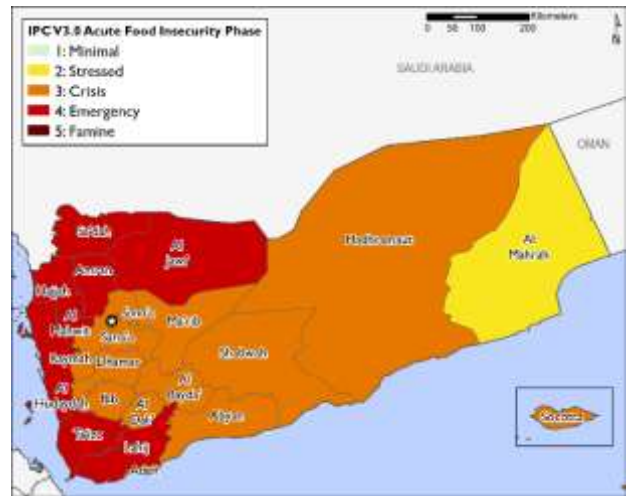
FOOD SECURITY OUTCOMES ASSUMING NO HUMANITARIAN FOOD ASSISTANCE IN THE PROJECTION PERIOD*

Projected food security outcomes, March to May 2019



Source: FEWS NET

Projected food security outcomes, June to September 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.

*Current IPC v3.0 protocols require that a second set of projection maps be created to indicate the most likely food security outcomes in the absence of the anticipated effects of humanitarian food assistance. This protocol is under review and may change.

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.](#)