



GIEWS Country Brief Yemen

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FOOD SECURITY SNAPSHOT

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

Conflict continue to threaten agricultural livelihoods

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

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

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

Yemen

Crop Calendar

(*major foodcrop)

Wheat*
Sorghum



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Yemen

Cereal Production

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

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

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

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

Well below-average cereal harvest in 2020

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

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

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

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

Over 24 million people in need of humanitarian assistance

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

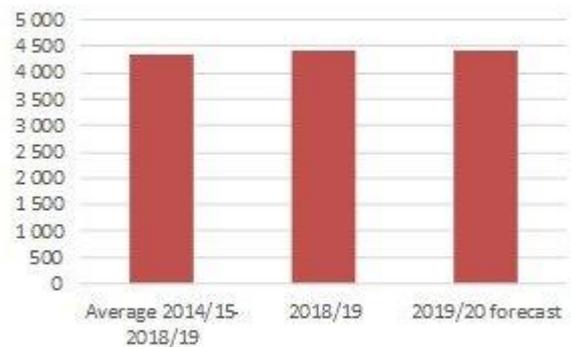
In April 2020, as households stockpiled ahead of Ramadan while facing COVID-19 containment measures, prices of most imported and locally produced goods increased compared to March 2020. Prices of sugar and cooking oil increased by almost 10 percent, while the price of rice increased by 5 percent. In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

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

Yemen

Cereals Imports

000 tonnes



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

Source: FAO/GIEWS Country Cereal Balance Sheets.

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

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

COVID-19 and measures adopted by the Government

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

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

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

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

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

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