

YEMEN FOOD AVAILABILITY BRIEF (as of 1st November 2017)

1. Preamble

The food security situation in Yemen has deteriorated alarmingly since the conflict began in mid-March 2015. The conflict has destroyed households' livelihoods and ability to purchase food and meet minimal food needs. The food insecurity levels continue spiraling upwards with an estimated 17.8 million Yemenis (61% of the population) struggling to feed themselves and not sure of where their next meal will come from. Out of this, approximately 8.4 million individuals are severely food insecure and face elevated hunger levels and heightened risk of starvation¹.

The total amount of food available in Yemen is dependent on several sources:

- Commercial imports;
- Humanitarian imports/ food aid;
- Local production;
- Existing food stocks/reserves

These various sources determine the national level (macro-level) food availability but does not necessarily reflect what is available at the household level. Household level food insecurity is due to lack of economic access (disposable incomes) and insufficient household level crop production, as opposed to general food availability.

2. Total Country Cereal Import Requirements

Yemen is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat and rice, the country's two main staples. The wheat import dependency is currently estimated at 95 % while that of rice is 100 %. According to FAO estimates, wheat accounts for 51 % of caloric intake of Yemenis, making it the most important staple.

In the last five years, an average of 2.8 million tons per annum of wheat was imported annually out of a total domestic wheat requirements of about 3 million tons. The import requirement for cereals in 2016 was estimated at 4.1 million tons, including 3 million tons of wheat, 700 000 tons of maize and 420 000 tons of rice².

The country's total 2017 cereal import requirements is estimated at 4.1 million metric tons based on the aforementioned figures.

3. Commercial Food Stocks in the Country

FAO estimates that a total of 2.7 million metric tonnes of wheat grain have been imported into the country as of 30th September 2017. The data is consolidated from the country's four main ports of Hodaydah, Aden, Al Mukalla, and Saleef.

¹ Food Security and Agriculture Cluster

² FAO GIEWS Country Brief on Yemen (Reference date: 12th April 2017)



Table 1: Yemen Wheat Grain Imports in Metric Tons (January - September 2017) ³

Years\Month	2014	2015	2016	2017
January	268,874	160,550	166,750	364,864
February	326,337	300,256	251,070	201,417
March	313,185	282,600	250,291	284,544
April	372,644	315,122	54,829	353,447
May	170,197	144,864	332,635	453,649
June	377,043	323,417	158,600	292,678
July	141,850	338,009	262,100	356,307
August	295,758	83,500	237,553	149,959
September	289,979	131,250	108,250	213,855
Total	2,555,867	2,079,568	1,822,078	2,670,720

Estimates from WFP and other sources indicate that as of 1st November 2017, there are currently 1.3 million metric tons of various food commodities (wheat, rice, sugar, vegetable oil, Salt and pulses) in the country as commercial stocks (table 2 below).

Table 2: In country Stock of food commodities (as of 1st November 2017)

Commodity	Stock (in Metric Tons)
Wheat Grain	612,500
Wheat Flour	270,000
Rice	228,000
Sugar	90,450
Vegetable Oil	53,500
Salt	70,004
Pulses	12,850
TOTAL	1,337,304

Wheat stocks (wheat grain and flour) account for 66% (882,500 MT) of the total commercial food stocks. The amount of wheat stocks in country are enough to cover **3.5 (three and a half) months** of the monthly national domestic wheat utilization requirements of approximately 250,000 MT (out of the annual wheat utilization requirements of approximately 3 million Metric tons).

With regard to rice⁴, the available stocks in country in are enough to cover **6.5 (six and a half) months** of the estimated monthly rice requirements of 35,000 MT (out of Yemen's annual rice utilization requirements of approximately 420,000 MT).

³ FAO - Food Security Information Systems (FSIS) / Enhancement of Food Security and Resilient Livelihoods Programme (EFLRP) data

⁴ Mostly consumed by Yemenis drawn from the coastal communities and urban centers. The majority of Yemenis (especially from the rural areas) predominantly rely on wheat and other locally produced cereals (sorghum, millet, maize & barley) as their main staples

The total quantity of sugar⁵ in country is enough to cover **3 (three) months** of the estimated 28,571MT monthly sugar utilization requirements of Yemen.

4. Humanitarian Food Stocks in the Country

WFP currently has 200,000 MT of food stocks **enough to assist 7 million people for the next 2 (two months)**⁶.

The breakdown (in metric tonnes) is as below:

- 111,000 MT - Silos and warehouses
- 35,000 MT - Mixed food commodities available at Food Distribution Points (FDPs) for the November distribution
- 25,000 MT - Local purchase
- 29,000 MT - Discharging in ports

5. Local Cereal Production

On average, Yemen's total domestic cereal production (wheat, sorghum, millet, maize, and barley) covers less than 20 percent of the total domestic utilization requirements (food, feed and other uses). The share of domestic wheat production in total food utilization requirements in the last ten years is between 5 to 10 percent, depending on the domestic harvest.

In 2016, the total cereal production in Yemen was estimated at 480 000 tons, including 220 000 tons of sorghum and 150 000 tons of wheat, about 11 percent below the previous year's harvest and 37 percent below the five-year average⁷.

The domestic cereal production in 2017 has been severely hampered with indications that the October/November harvest will most likely not offset the local cereal production deficits. The cultivated land for cereals under rain fed conditions has decreased by 11%, while it has reduced significantly by 40% for irrigated land compared with the pre - crisis period.⁸ Based on this we can estimate the expected domestic production of wheat this year to be approximately 150,000 tons (5% of total wheat utilization requirements).

6. Fuel Stocks in the Country

Estimates from WFP⁹ indicate that as of 1st November 2017, there are currently 153,434 metric tonnes of fuel in the country. This constitutes 124,193 MT of diesel and 29, 241 MT of petrol **enough to cover slightly over 1 week of Yemen's weekly fuel requirements** estimated at 136,000 MT¹⁰. It is

⁵ Sugar consumption is a critical component of the Yemeni food habits, and is consumed on average 6 -7 days per week by almost all households

⁶ WFP Yemen Supply Chain

⁷ FAO GIEWS Country Brief on Yemen

⁸ Yemen Food Security Update, September 2017. FAO-EFLRP Program

⁹ WFP Supply Chain

¹⁰ Based on Yemen's monthly estimated fuel requirements of 544,000 MT. WFP Logistics cluster

noteworthy though that this figure might have increased slightly over the past few days due to the opening of the Aden sea port.

While the amount of commercial wheat stocks in the country may be enough to last approximately 3.5 months, the insufficient quantity of fuel stocks will constitute a huge challenge in ensuring better distribution/movement of goods and improving availability of essential commodities in local markets (especially locations with active conflict and far flung from major urban centres).

7. Conclusion

Yemen is highly reliant on food imports to satisfy domestic demand (95% wheat and 100% rice), making it especially susceptible to import fluctuations, price volatility, and restrictions/blockade on food imports. Moreover, the impact of the ongoing conflict-induced crisis has been devastating for the country, aggravating an already deteriorating pre-conflict economic performance with serious impacts on food imports, transportation networks and market supply, and hence on prices of both imported staples and locally produced commodities. The conflict has also exacerbated the key pillars of food security (in terms of access-physical and disposable incomes; availability-reduction in imports and inaccessible markets; and utilization- lack of fuel energy and access to clean water to handle food).

As a consequence of the aforementioned, an estimated 17.8 million – six out of every 10 Yemenis – don't know where their next meal will come from. A majority of the vulnerable households face a precarious food security situation considering that most are dependent on the market for their food purchases. Any disruptions in the market (transport interruptions, commodity price increases, reduced volumes and/or un-availability of key staples, lack of physical access to the markets etc.) could lead to disastrous consequences, especially to vulnerable households whose lives are already at the precipice.

At this point in time, Yemen's fragile economy cannot withstand any further shocks. The de facto blockade on commercial and humanitarian imports is already exacting a dire humanitarian toll on all segments of the Yemeni population. Prices of key food staples have risen by between 10 - 25%, while fuel prices have risen by 15 - 60 %¹¹. The YER has also depreciated by an alarming 10% within this week alone! ¹². Considering the low volumes of commercial and humanitarian food stocks available in the country and the lead time needed for importation clearances, it is pertinent that the restrictions on food imports are lifted.

Millions of vulnerable Yemeni lives already facing heightened hunger and near starvation levels, are now at risk of famine unless urgent steps are taken to remedy the situation in the coming weeks. It is therefore incumbent upon the humanitarian community, member countries, donors, and other stakeholders with influence to urgently engage with the parties to the conflict, and explore all available options in order to avert the looming food crisis in Yemen.

¹¹ Average figures as this differ from one location to another

¹² Current exchange rate at 1USD= 430 YER