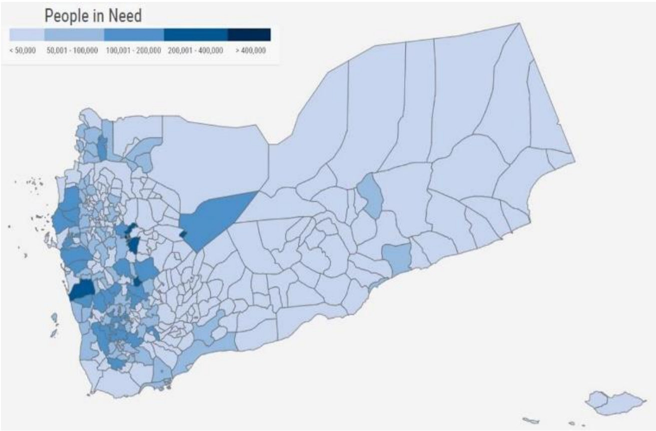
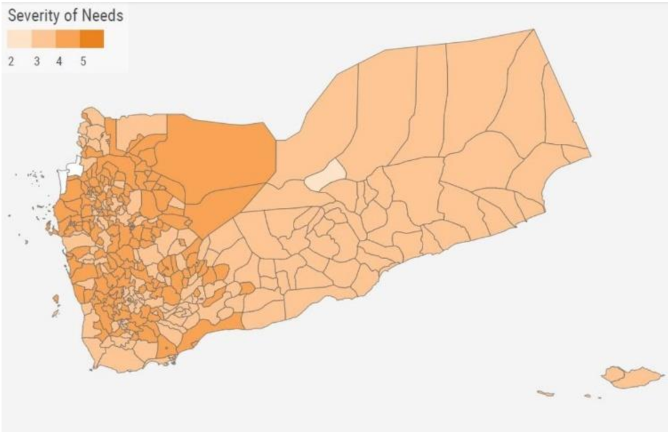
3.1 Food Security and Agriculture Cluster (Placeholder until completion of IPC Analysis)

PEOPLE IN NEED	WOMAN	CHILDREN	WITH DISABILITY
16.9 million	24%	51%	15%

People in need



Severity of needs



3.1
Food Security and Agriculture Cluster

Overview / Key Trends

The protracted nature of the food crisis in Yemen is characterized by interlocking vulnerabilities and compounding factors including conflict, displacement of populations, economic instability, currency fluctuations, rising food prices, climate change hazards and sub-optimal access to basic services. Thus, an estimated 16.9 million people in Yemen (50% of the total population) are likely to be severely food insecure (IPC phase 3 and above) in 2024, with 5.7 million expected to experience emergency levels of food insecurity (Phase 4). This severe food insecurity includes 160 districts (49%) in emergency phase (IPC phase 4) and 170 districts (50%) in a crisis phase (IPC Phase 3). The highest proportions of population in emergency and crisis phases are expected to be in Al Hudaydah, Dhamar, Hajjah, Marib, Sana'a, Sa'adah, and Taiz Governorates. The PiN is 500,000 less than 2023, indicating slight but temporary improvement in the overall food security situation owing to the prevalent drivers of food insecurity in the country. Locations showing relative stability in food security outcomes over the past year have more people in need of emergency agriculture and livelihood support.

Analysis of Humanitarian needs

Yemen imports 90-95% of its wheat and 100% of rice requirements from abroad. Wheat flour is the staple food for most households in Yemen; sorghum and rice are most often consumed as substitutes. Wheat flour is the staple food for most households in Yemen; sorghum and rice are most often consumed as a substitute. The Country's dependence on imported fuel and food to meet local demand exposes its citizens to changes in international market dynamics, including price hikes and supply disruptions[1]. The latest evidence published in September 2023 by WFP shows that fuel supply has significantly improved since the signing of the truce agreement despite recent price increases in response to global crude oil spike. Fuel prices expected to gradually increase in IRG areas linked to projected currency depreciation, continuation of the Ukraine-Russia conflict and continued scale-down of oil production by the Kingdom of Saudi Arabia and its partners. Amidst a 12% decline in the global food prices in August 2023, compared to a similar period in the previous year, the prices of essential food commodities in Yemen's markets showed significant fluctuations in SBA controlled areas and minimal fluctuations in IRG-controlled areas. For instance, the cost of the minimum food basket (MFB) witnessed only a 5% annual decline in IRG-controlled areas in contrast to a 21% decline in SBA controlled areas[2]. The fluctuation in global food prices does not necessarily translate to improved purchasing power among Yemenis, given the country's socioeconomic fragility and public sector salary freeze, which has exacerbated poverty and unemployment. For example, in September 2023, 75% of households resorted to severe livelihood coping strategies (crisis and emergency)[3],that included selling of household assets as one of the options to meet basic needs. Inadequate access to food and consumption of sub-optimal diets among poor households will likely worsen the existing higher-than-average food consumption gaps.

About 70% of Yemenis live in rural areas and could depend on agriculture as a critical source of food and income.4 However, the agriculture sector in Yemen has been affected by floods, drought, pests and high cost of farm inputs all contributing to reduced crop yields. Desertification caused by drought has resulted in a yearly loss of 3-5% of arable land. Moreover, water scarcity remains the biggest obstacle to improving agricultural productivity in Yemen, and the depletion of water resources could lead to a 40% reduction in agricultural productivity. Floods have also led to displacement, soil erosion and loss of agricultural land, decreasing cropland. Between July and September 2023, 1,089 households of 6,534 individuals experienced displacement at least once. Since the beginning of April 2022, the number of tracked new instances of displacement showed a declining trend-most likely linked to the truce that lasted formally until October 2022. However, the number began to rise in the first quarter of 2023 due to the renewed conflict in Harib (Marib) and heavy rains and floods in Shabwah governorate. 5. The impact of climate change on Yemeni agriculture is not expected to improve over the year, especially with anticipated more intense rainfall and longer droughts indicated by early warning systems.[6] The country is also a breeding ground for desert locusts that cause catastrophic damage to pasture and crops, further negatively affecting the agriculture sector.

1 FAO Monthly high frequency Report, August 2023-Yemen
2 WFP Food Security Update, Yemen, September 2023.
3 FEWS NET Yemen Monthly Update, September-2023
4 Climate, Peace and Security Fact Sheet, Yemen, June 2023.
5 IOM Yemen: Rapid Displacement Tracking - Third Quarter Report (July - September 2023)
6 Climate Change Impacts on Yemen and Adaptation Strategies-YFCA.

Projection of Needs

Approximately 16.9 million people are expected to be food insecure throughout the year, with seasonal variations expected across the months. Fuel costs, freight and customs duties is expected to gradually increase linked to projected further currency depreciation, continuation of the Ukraine-Russia conflict and continued scale-down of oil production by the Kingdom of Saudi Arabia and its partners. Thus, staple food prices, particularly in areas under IRG AoC are expected to marginally increase and remain above last year's levels despite the decline in global food prices. Low livelihood and income opportunities are expected to persist; real income from casual labor (farm and off-farm) will likely remain below last year and pre-truce and non-frontline areas levels because of economic crisis and a challenged agriculture sector.

The highest food insecurity levels are expected to occur between January to June, characterized by peak water prices, amidst increasing water scarcity and onset of the lean season. Marginal gains in food security are expected from July to December characterized by the first harvest of wheat, millet and sorghum (from July to August) and the second harvest of sorghum and coffee (October to December). Harvesting season is likely to create some casual/temporary labor opportunities in few localized agricultural areas, contributing to needed income and food to support household consumption. However, Yemen remains a food import dependent country as over 90% of cereal are imported.7The occurrence of floods (from March to May and from July to September) is likely to exacerbate existing levels of displacement and destroy agricultural lands and harvests. 8.

As of the last quarter of 2023, key FSAC partners' needs-based plans are less than 15% funded through the first quarter of 2024, thus reduction of humanitarian food assistance is likely[9]. This is despite FSAC partners providing rations that covered only 40% of the standard ration of 2,100Kcal monthly, throughout 2023 due to funding shortages. Given the climatic shocks, poor macro-economic conditions, above-average food prices, anticipated further reduction of humanitarian food assistance levels amidst a challenging operational environment, millions of households will likely continue to face food consumption gaps and experience crisis (IPC Phase 3) or worse food security outcomes throughout the year[10]. Of particular concern are internally displaced households, Muhamasheen, returnees, households' dependent on only one main income source, and the poorest households owing to expectations for further economic deterioration and reductions in income-earning opportunities.

Projected Needs (2024)

Thousands of people (k)

	PEOPLE IN NEED	ASSOCIATED FACTORS	MOST VULNERABLE GROUPS
January to December 2024	16.9 million	Conflict, public sector salary freeze, climatic shocks, falling remittances, high dependency on imports, decreased purchasing power, reduced humanitarian assistance	Children, Muhamasheen, IDPs, Returnees and Female headed Households.

A. Link to PIN derivation:

https://fscluster.org/yemen/document/fsac-pin-2024-placeholder

[7] FEWS NET Yemen Monthly Update, September-2023

[8] IOM Yemen: Rapid Displacement Tracking - Third Quarter Report (July - September 2023)

[9] WFP facing critical funding shortage in Yemen threatening vital food assistance

[10] FEWS NET Acute Food Insecurity, September 2023 projected outcomes for Yemen.