



WFP

World Food Programme

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YEMEN | FOOD SECURITY QUARTERLY REVIEW

Q1 2022

Highlights of Q1-2022

- **Prevalence of inadequate access to food:** Food insecurity remains persistently high during Q1-2022. Half of the surveyed households during March were unable to meet their minimum food needs, indicating that the country reached the worst nationwide levels of food insecurity since 2018. This was driven by an escalation of conflict levels, all time high food prices, high fuel prices and a reduction in humanitarian food assistance.
- **IPC results in March 2022:** In Q1-2022, 17.4 million Yemenis are facing acute food insecurity with 31,000 living in famine-like conditions (IPC Phase 5). By mid-2022, acute food insecurity is projected to increase to 19 million, with 161,000 people facing famine-like conditions.
- **Humanitarian food assistance:** Due to funding shortfalls, as of January 2022, WFP targeted eight million people with reduced rations in each distribution cycle, while five million people living in areas of highest concern were targeted for food assistance with full rations.
- **Conflict:** Q1-2022 saw the highest quarterly civilian casualty count over the past three years, with higher proportion recorded in Sa'dah, Al Hodeidah, Ma'rib, Ta'iz, Shabwah and Sana'a City. However, in late March, the parties to the conflict in the country agreed on the United Nations proposal for a nationwide two-month truce starting 2nd of April.
- **Exchange rate:** The exchange rate continued to fluctuate in areas under IRG. During Q1-2022, the Yemeni riyal lost 28 percent of its recorded value at the beginning of the year. However, the exchange rate appreciated by 34 percent between end of March and mid of April following the truce, largely due to the anticipation of USD two billion deposit from KSA and UAE at CBY Aden in 2022.
- **Fuel imports:** Total imports of fuel through the northern ports of Al Hodeidah and Saleef decreased by 11 percent in Q1-2022 compared to the last quarter of 2021, while fuel imports through the southern ports of Aden and Mukalla increased by around 80 percent during the same period.
- **Food imports:** The volume of food imports during Q1-2022 increased by 24 percent through Al Hodeidah and Saleef ports compared to Q4-2021, while it remained stable for Aden port. However, the food imports through Aden port in Q1-2022 and Q4-2021 were comparably lower than the first three quarters of 2021, largely associated with the reduction of humanitarian food assistance in Yemen, which is mostly imported through Aden port.
- **Global food and fuel prices:** The global FAO Food Price Index increased significantly in March 2022 to a new all-time high since 1990, at the same time, fertilizer prices reached their highest level since late 2008. In addition, the global crude oil prices in March marked the highest level recorded over the past ten years.
- **Fuel prices:** The prices of fuel sold through gas stations and black markets reached an all-time high during Q1-2022. The pump price of petrol and diesel increased by 78 and 90 percent respectively over Q1-2022 in areas under IRG control compared to the last quarter of 2021, while areas under Sana'a-based authorities saw increases of 20 percent and 43 percent respectively.
- **Minimum food basket in areas under IRG:** The monthly average cost of MFB increased by 25 percent during January-March, reaching another all-time peak of YER 17,168 in March 2022. It is highly concerning that families are now required to pay twice as much to keep the same level of food consumption which they struggled to maintain in 2021.

- **Minimum food basket in areas under Sana'a-based authorities:** The monthly average cost of MFB sharply increased by 12 percent between February and March 2022, reaching an all-time high of YER 8,808 during March. This is mainly due to the intensified fuel shortage and increased fuel prices in the north during Q1-2022 and the continued rise in global food prices.

A. Key drivers of food insecurity during Q1-2022

Conflict and economic crisis remain the main drivers of acute food insecurity in Yemen, further exacerbated by a series of internal and external shocks including the intensification of severe fuel shortages across the country; a spike in global food and fuel prices; the impact of the Ukraine-Russia conflict on the global availability and prices of wheat and cooking oil; and the reduced humanitarian funding for life-saving food assistance in Yemen.

- **Conflict:** According to the latest IPC analysis, conflict is foremost the principal driver of increased acute food insecurity and malnutrition in Yemen as it is fuelling macroeconomic deterioration and negatively affecting livelihoods, household purchasing capacity and the ability to access food.

Violence continued to escalate at the beginning of 2022 with a sharp increase in the number of airstrikes¹. Q1-2022 saw the highest quarterly civilian casualty count in the country over the past three years² with 1,095 civilians killed or injured as a direct result of armed violence. The majority was in Sa'dah, Al Hodeidah, Ma'rib, Ta'iz, Shabwah and Sana'a City. More than half of the total casualties were reported during January, largely because of a mass casualty airstrike in Sa'dah that is considered the worst civilian casualty incident in Yemen in the last three years³. Furthermore, it negatively affected the food security situation in the governorate as the prevalence of inadequate food consumption increased by 32 percent during Q1-2022 to reach 41 percent in March.

Moreover, air strikes continued to impact infrastructure and access to vital services. During Q1-2022, ten healthcare facilities were reportedly impacted, double the level reported in Q4 2021; nine incidents affected education facilities, a 50 percent increase from the previous quarter; and there were eight incidents impacted fuel facilities in Q1-2022, compared to two in Q4-2021.

As a result of the ongoing conflict, IOM estimated that approximately 29,700 people in Yemen have been displaced at least once during Q1-2022⁴, around half of these IDPs were reported in January 2022. Displacement during Q1 2022 was more evident in Al Hodeidah and Ma'rib. As of March 2022, 4.3 million Yemenis were internally displaced (IDPs), with 40 percent living in informal displacement sites with inadequate or non-existent access to basic services⁵.

In April 2022, the parties to the conflict in Yemen agreed to the United Nation's proposal of holding a two-month truce as of 2nd of April⁶. The agreement—the first countrywide truce since 2016⁷—includes a cessation of offensive military operations inside Yemen and across its border, as well as facilitating fuel ships to enter into Al Hodeidah port and allowing commercial flights to and from Sana'a airport. This agreement opens the door to addressing the urgent humanitarian and economic needs and could contribute to building trust and creating a conducive environment to resume negotiations for a peaceful settlement of the prolonged conflict. In June, the truce was extended beyond the two-month period with the consent of the parties.

¹ Office of the special envoy of the Secretary-General for Yemen: <https://osesgy.unmissions.org/briefing-United-nations-security-council-special-envoy-yemen-hans-grundberg-1>

² CIMP quarterly report Q1-2022: https://civilianimpactmonitoring.org/onewebmedia/CIMP%20Quarterly%20Report_2022_Q1.pdf

³ UN news: <https://news.un.org/en/story/2022/01/1110552#>

⁴ IOM Yemen: https://displacement.iom.int/sites/default/files/public/reports/20220410_RDT_2022%20Q1_1%20Jan-31%20March%202022.pdf

⁵ UNHCR Yemen: <https://reporting.unhcr.org/needs-mount-as-conflict-in-Yemen-rages-on>

⁶ UN Secretary-General's statement on a nationwide truce in Yemen:

<https://www.un.org/sg/en/content/sg/statement/2022-04-01/secretary-generals-statement-nationwide-truce-yemen>

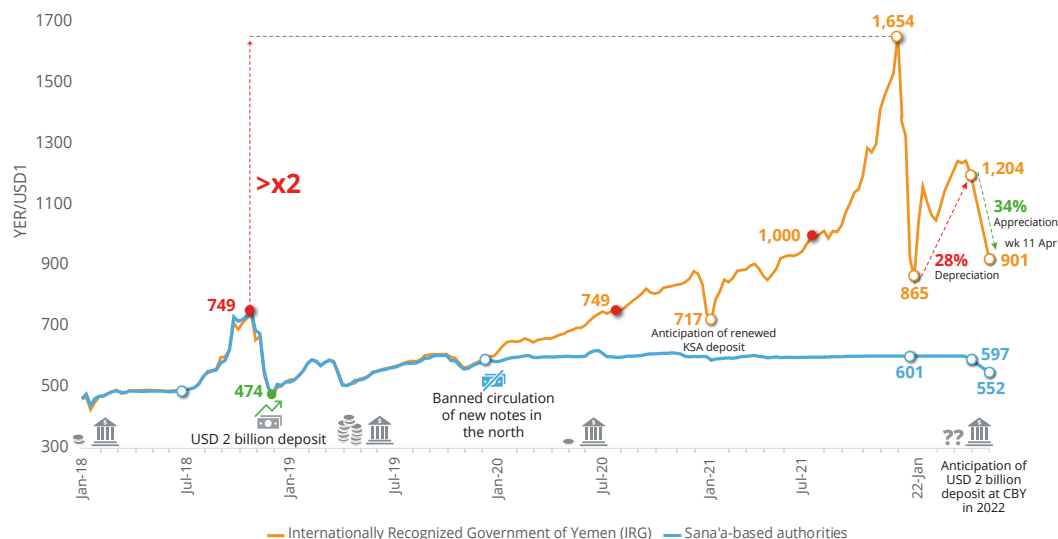
⁷ USAID Yemen: <https://reliefweb.int/report/yemen/yemen-complex-emergency-fact-sheet-6-fiscal-year-fy-2022>

• **Exchange rate:** Macroeconomic conditions are highly challenging and unstable due to the increasing fragmentation of national institutions, conflicting policies, shortages in foreign currency reserves, and the severely stressed public finances which the government tried to accommodate through the monetisation of fiscal deficit (World Bank, April 2022). The factors above had various implications, including an unstable currency market and the continued divergence of the rial's value in different parts of Yemen.

The exchange rate has been fluctuating in areas under IRG during Q1-2022, however, it witnessed a relative improvement compared to Q4-2021 during which the Yemeni rial had depreciated to unprecedented levels of YER 1,654/USD 1. Following the appointment of a new board of directors for the Central Bank of Yemen (CBY) at the end of December 2021, the exchange rate improved to YER 865/USD 1. However, shortly after, it depreciated again and reached YER 1,204/USD 1 by end of March. During January-March 2022, the Yemeni rial lost around 28 percent of its recorded value compared to the beginning of 2022.

CBY Aden implemented additional market controls in attempt to stabilize the rial in the south. Cross-governorate transfers of foreign currencies were prohibited, unless approved by CBY Aden. In addition, deposits within exchange offices were banned and non-compliant offices were suspended^{8,9}. In addition to the implemented controls, CBY Aden continued to conduct currency auctions which were introduced in late-2021¹⁰, where foreign exchange is being traded via auctioning as a short-term measure to alleviate the pressure on the rial.

Exchange rate*



The two-month truce agreement starting 2 April led the Kingdom of Saudi Arabia and United Arab Emirates to announce an economic support package of more than two billion dollars to stabilize the new Yemeni rial in the south. Despite the non-materialisation of the deposit at CBY, the exchange rate appreciated by 34 percent during the first two weeks of April, highlighting how highly speculative and volatile the currency market is in the south.

On the other hand, the rial remained stable during Q1-2022 in areas under Sana'a-based authorities at around YER 600/USD 1, almost the same rate since January 2020. This is mainly attributed to the strict control measures implemented by the authorities in Sana'a, including the ban on circulation of the new banknotes printed by CBY and the imposed restrictions on the transfer of foreign currency.

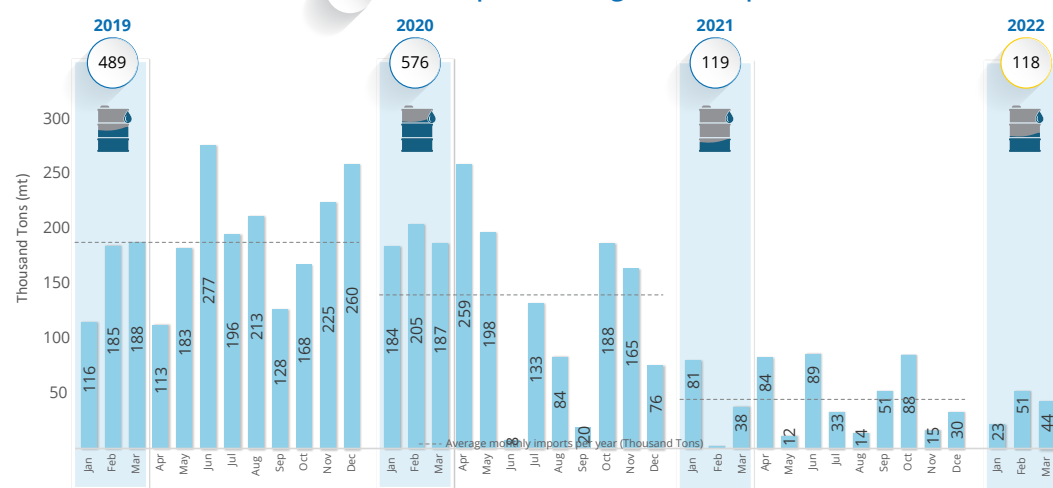
Furthermore, in association with the truce agreement, the exchange rate in the north appreciated by eight percent between end of March and the second week of April, reaching YER 552/USD 1 by mid-April.

• **Fuel imports:** The fuel crisis worsened across the country during Q1-2022, particularly in areas under Sana'a-based authorities. The restriction on Al Hodeidah port led to severe fuel shortages since June 2020. Total fuel imports via northern ports of Al Hodeidah and Saleef during Q1-2022 were 11 percent less than fuel imports during the last quarter of 2021¹¹. On the other hand, fuel imports through the southern ports of Aden and Mukalla increased by around 80 percent during Q1-2022 compared to Q4-2021.

The fuel crisis in the north intensified in late-December 2021 following the decree of IRG to limit the distribution and sale of oil derivatives countrywide only to the Yemen Petroleum Company (YPC) in Aden¹². Furthermore, periods of fuel shortages have become increasingly common in the south, partly due to financial inability of IRG to purchase the fuel from the importing traders¹³.

The lack of fuel limited people's mobility, with long queues observed at fuel stations countrywide. During most of January, fuel shortages have resulted in the near total closure of many gas stations in the north¹⁴, leading prices to double while also hampering public transportation¹⁵. Moreover, health facilities across the country were forced to shut off life-saving equipment because of a sharp drop in fuel imports during Q1-2022 and many hospitals have warned that they risk shutting down completely should the delivery of fuel continue to be delayed and restricted¹⁶.

Fuel imports through Red Sea ports

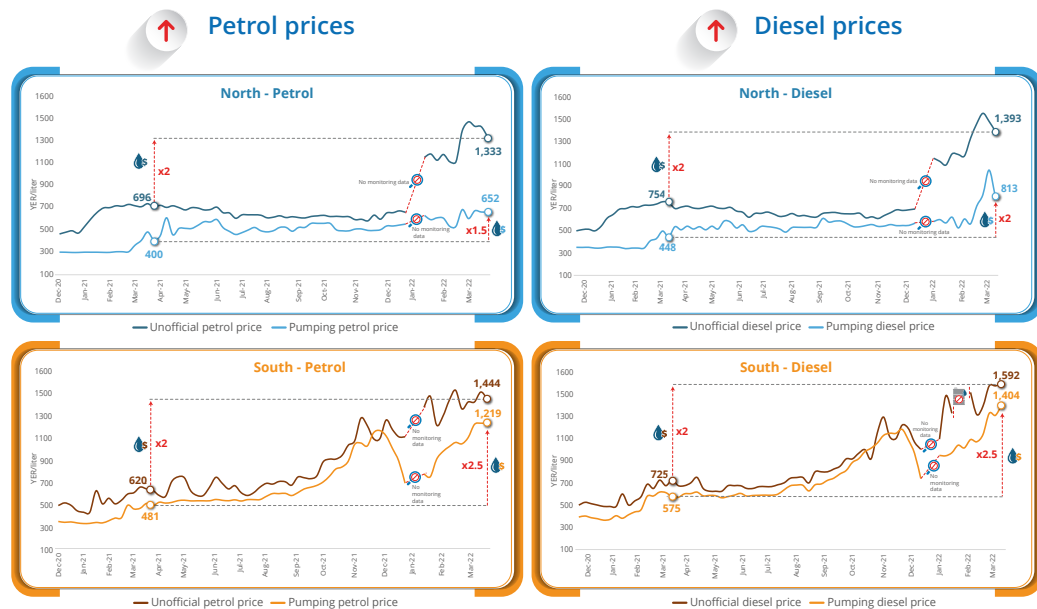


Additionally, many farmers were negatively affected by the lack of fuel and high fuel prices, hampering their ability to access needed water pumps for irrigation and driving increasingly high production costs, which in turn affected local crop production¹⁷.

* Source: WFP price monitoring
⁸ CBY control measures on the exchange rate: <https://hayrout.com/112272/>
⁹ Aden CBY warning against exchange shops: <https://www.mda-press.net/news/36163>
¹⁰ FEWSNET Yemen December 2021: <https://fews.net/east-africa/yemen/food-security-outlook-update/december-2021>
¹¹ The United Nations Verification and Inspection Mechanism for Yemen (UNVIM): <https://www.vimye.org/>
¹² Ministerial decree No. 30 for 2021: <https://yemenshabab.net/economy/72359>
¹³ FEWSNET Yemen January 2022: <https://fews.net/east-africa/yemen/key-message-update/january-2022>
¹⁴ FEWSNET Yemen January 2022: <https://fews.net/east-africa/yemen/key-message-update/january-2022>
¹⁵ FEWSNET Yemen February 2022: <https://fews.net/east-africa/yemen/key-message-update/february-2022>
¹⁶ Save the children: <https://reliefweb.int/report/yemen/yemen-fuel-crisis-pushes-sickest-children-brink>
¹⁷ FEWSNET Yemen March 2022: <https://fews.net/east-africa/yemen/food-security-outlook/march-2022>

Fuel prices: By the end of Q1-2022, global prices of crude oil had reached their highest levels in the past ten years. The global prices of oil increased by around 36 percent during January-March 2022 and almost by 79 percent from March 2021 to March 2022¹⁸. Global energy prices started increasing in 2021, before the start of Ukraine-Russia conflict¹⁹. Currently, global prices are forecasted by the Organization of the Petroleum Exporting Countries (OPEC) to increase further due to large oil supply shortages worldwide²⁰, particularly given that Russia is among the top three crude oil producing countries and the world's largest gas exporter²¹.

In areas under IRG, the average pump prices of petrol and diesel²² increased by 78 and 90 percent



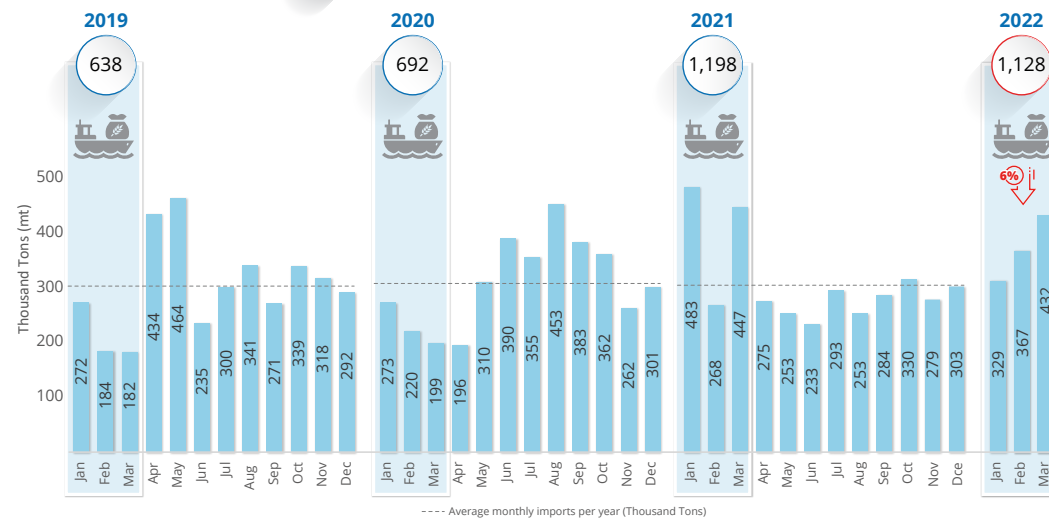
during Q1-2022 respectively. At the same time, prices in the parallel unofficial market increased by 31 percent for petrol and by 59 percent for diesel. Both official and parallel market fuel prices have more than doubled year-on-year.

In areas under Sana'a-based authorities, the average pump prices increased by 20 percent for petrol and by 43 percent for diesel during Q1-2022, while both prices doubled in the parallel market. The large increase in black-market fuel prices were driven by the shortage of fuel supply; the petrol prices in the black market was 104 percent higher than in gas stations at the end of March compared to 19 percent at the end of December 2021. A similar gap between official and parallel markets was also observed in diesel prices, where prices were 71 percent higher in the black market in March compared to 22 percent in December 2021.

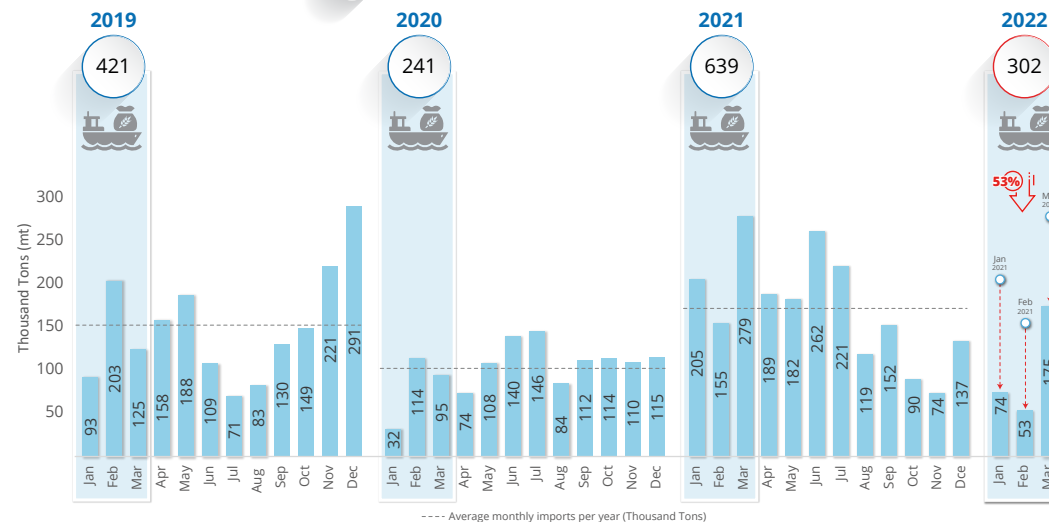
The increase in fuel prices in Yemen was associated with many factors; in areas under IRG, petrol pump prices were mainly driven by rising global oil prices, the overall supply being lower than the actual demand as some of the increase in fuel imports is traded to the north, and the continued volatility in the exchange rate. In areas under Sana'a-based authorities, increase in fuel pump prices was driven by the increase in global oil prices, limited fuel imports due to restrictions, rising shipping costs and demurrage fees imposed on coalition-held vessels, along with double taxation and additional transportation costs of fuel supply from the southern ports into the northern areas.

Food imports: Yemen relies on imports for around 90 percent of its total food needs²³. Local production of cereals covers less than 20 percent of national needs, with domestic wheat production contributing to merely 5-10 percent of total wheat supply²⁴.

↓ Food imports through Red Sea ports



↓ Food imports through Aden Port



¹⁸ US Energy Information Administration: https://www.eia.gov/dnav/pet/pet_pri_spt_s1_m.htm
¹⁹ UN study on the global impact of war in Ukraine on food, energy and finance systems: <https://reliefweb.int/report/world/global-impact-war-ukraine-food-energy-and-finance-systems>
²⁰ OPEC monthly oil market report in April 2022: <https://momr.opec.org/pdf-download/>
²¹ International Energy Agency: <https://www.iea.org/topics/russia-s-war-on-ukraine>
²² Pumping fuel price: the average of official price and commercial price of fuel sold through the gas stations
²³ UN news: <https://news.un.org/en/story/2022/03/1114002>
²⁴ Yemen HNO 2022: https://reliefweb.int/sites/reliefweb.int/files/resources/Yemen_HNO_2022%20-%20Final%20Version%20%281%29.pdf

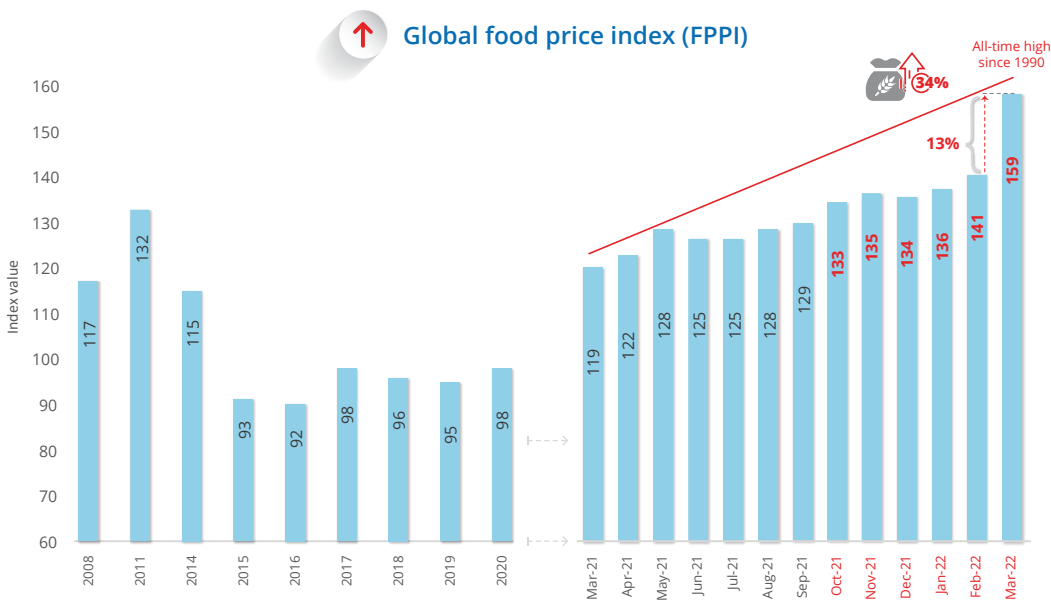
The total volume of food imports discharged via Al Hodeidah and Saleef ports during Q1-2022 (1,128 thousand mt) increased by 24 percent from the last quarter in 2021. At the same time, the volume of food imports through Aden port (302 thousand mt) remained the same as Q4-2021, however, it is noted that food imports during Q1-2022 and Q4-2021 were comparably lower than the first three quarters of 2021. This observed decline was in association with reductions in humanitarian food assistance in Yemen. Considering that food import is the most important source of food availability in Yemen, close monitoring is necessary, particularly amid the disruptions of global supply chains and the ripple effect of the Ukraine-Russia conflict.

The current situation indicates that the Ukraine-Russia conflict is likely to lead to significant supply shocks in Yemen²⁵ and an upward pressure on local wheat prices, especially that 45 percent of wheat imports countrywide originate from Ukraine and Russia²⁶. The Ukraine-Russia conflict has disrupted the global wheat markets; an estimated 13.5 million tons of wheat are currently trapped within the two countries – 23 percent of their expected exports in 2021/22²⁷. In addition, according to the International Food Policy Research Institute (IFPRI)²⁸, around 43 percent of vegetable oils traded in international markets are impacted by export restriction resulting from Ukraine-Russia conflict.

IRG and Sana'a-based authorities reported in early March that both have sufficient stocks of wheat that could last for several months²⁹. This is also validated by Yemeni food suppliers³⁰ who indicate that traders' wheat reserves can cover the country needs till nearly August 2022. However, the potential shortages in global food supply towards end of 2022 pose high risks to food availability in Yemen and may lead to a countrywide catastrophe.

- **Global food prices:** The global increase in food prices has significant implications on local prices in food-deficit countries, particularly less developed ones such as Yemen.

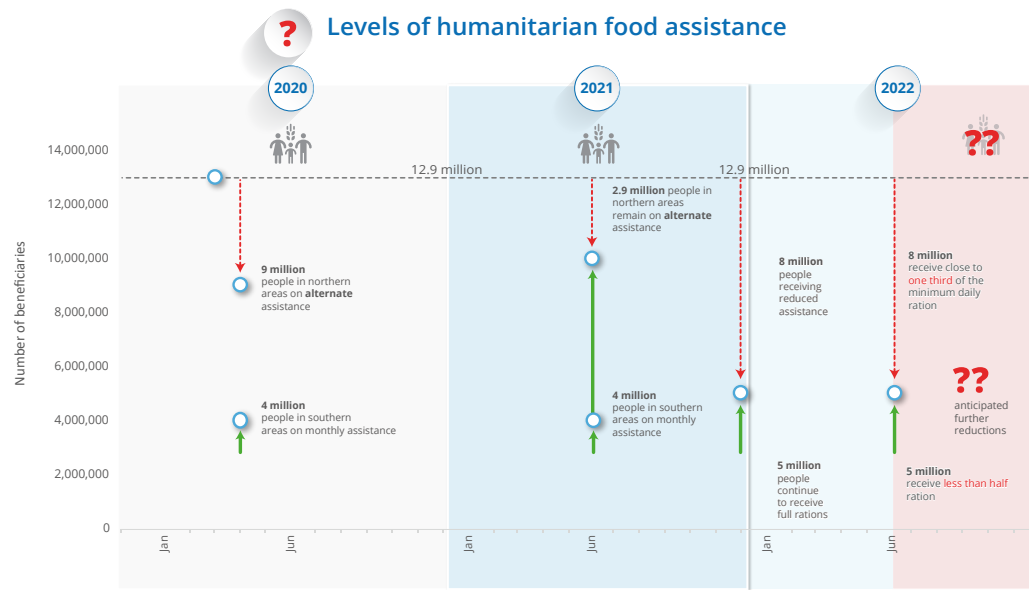
The FAO Food Price Index continued to rise in 2022 and reached its highest value since its inception in 1990 during March 2022³¹. The overall index increased by 34 percent compared to March 2021, driven by the increase in all food subgroups, particularly cereals and vegetable oils which increased by 37 percent and 56 percent respectively. The sub indices for sugar and dairy products also increased during the same period, by 23 percent and 24 percent respectively.



Provided that the majority of Yemenis heavily rely on imported cereals, vegetable oils and sugars for their daily diets (2021 FSLA, ACAPS), therefore the increase in global food prices is expected to have a severe impact on food insecurity levels, particularly for the poorer off households who are already spending the vast majority of their income on food. According to the World Bank, it is estimated that for each one percentage point increase in the global food prices, 10 million people are thrown into extreme poverty worldwide³². The impact is expected to be more adverse for the Yemenis who are struggling to cope with the cumulative increase in prices. One out of every three interviewed households mentioned that the increase in food prices is a key challenge limiting the household's ability to access adequate food.

The elevation in global food prices during March 2022 is associated with the Ukraine-Russia conflict and the resulting disruptions to exports from Ukraine. This is also exacerbated by the increase in the cost of natural gas since December 2021, a key ingredient for producing nitrogenous fertilizers. The global prices of fertilizers increased by nearly 30 percent since the beginning of 2022, following last year's 80 percent increase³³, marking the highest level recorded since late 2008.

- **The volume of humanitarian food assistance:** The latest Humanitarian Needs Overview (HNO) for Yemen indicated that around 23.4 million people require humanitarian assistance in 2022³⁴. According to the 2022 Integrated Phase Classification (IPC) for Yemen, nearly 17.4 million people are facing high levels of acute food insecurity during January-May 2022 and 31,000 are living in famine-like conditions. By mid-2022, this is projected to rise to 19 million people being acutely food insecure and 161,000 people living in famine-like conditions.



²⁵ FAO Yemen: <https://www.fao.org/newsroom/detail/yemen-acute-hunger-at-unprecedented-levels-as-funding-dries-up/en>
²⁶ Centre for strategic and international studies: <https://www.csis.org/analysis/impact-russias-invasion-ukraine-middle-east-and-north-africa>
²⁷ Food security implications of the Ukraine conflict: <https://docs.wfp.org/api/documents/WFP-000137634/download/>
²⁸ International Food Policy Research Institute: <https://www.ifpri.org/blog/impact-ukraine-crisis-global-vegetable-oil-market>
²⁹ FEWSNET Yemen: https://fews.net/sites/default/files/documents/reports/PW_GLOBAL_202203_FINAL.pdf
³⁰ Food suppliers operating in Yemen
³¹ FAO food price index: <https://www.fao.org/worldfoodsituation/foodpricesindex/en/>
³² International Monetary Fund: <https://www.imf.org/en/News/Articles/2022/04/13/pr22117-joint-statement-wbg-imf-wfp-and-wto-call-for-urgent-coordinated-action-on-food-security>
³³ World Bank: <https://blogs.worldbank.org/opendata/fertilizer-prices-expected-remain-higher-longer>
³⁴ Yemen HNO 2022: https://reliefweb.int/sites/reliefweb.int/files/resources/Yemen_HNO_2022%20-%20Final%20Version%20%281%29.pdf

Humanitarian assistance plays a vital role in Yemen. FLSA results show that -on average- humanitarian food assistance was the main source of cereals for 27 percent of the population in areas under Sana'a-based authorities and 15 percent of the population in areas under IRG. In order to address the growing humanitarian needs in Yemen, WFP targeted the provision of general food assistance to 13 million people countrywide, however WFP was compelled to cut rations because of severe funding shortfalls. As of January 2022, eight million people were targeted with reduced rations in each distribution cycle, while five million people living in areas of highest concern were targeted for food assistance with full rations.

The reduction of funding resources and humanitarian food assistance is expected to have severe negative impact on the already dire food security situation in Yemen, further adding additional pressure on the vulnerable households across the country. On 16 March, a high-level pledging event for the humanitarian crisis in Yemen was held under the auspices of the United Nations to raise humanitarian funding to meet the urgent needs of people after seven years of war³⁵. However, the event raised less than a third of the funds required to sustain life-saving assistance programmes countrywide.

B. The cost of the minimum food basket

Minimum Food Basket (MFB) in areas under control of IRG: Food prices in the south are highly sensitive to exchange rate movements. In areas under IRG, the cost of a minimum food basket (MFB) briefly improved during the last two weeks of December 2021 following the currency appreciation. However, as the exchange rate started depreciating again since the beginning of 2022, the cost of the MFB also increased and peaked during March 2022. The increase in domestic food prices was also driven by the increase in global prices of food and fuel and hampered exports of wheat and vegetable cooking oil. The average cost of MFB increased by 25 percent during January-March 2022, reaching another all-time peak of YER 17,168³⁶ in March 2022. It is highly concerning that families are now required to pay twice as much to keep the same level of food consumption which they struggled to maintain in 2021. It's worth noting that the cost of MFB in March 2022 was almost seven times its pre-crisis level.

The continued increase in food prices is hollowing out household purchasing power, especially the poor and vulnerable groups who are already spending most of their incomes on food, thereby affecting their ability to cover essential needs. Results from WFP monthly household interviews (mVAM) data revealed that 36 percent of households in the south mentioned that the increase in food prices is a key challenge limiting their household's ability to access adequate food.

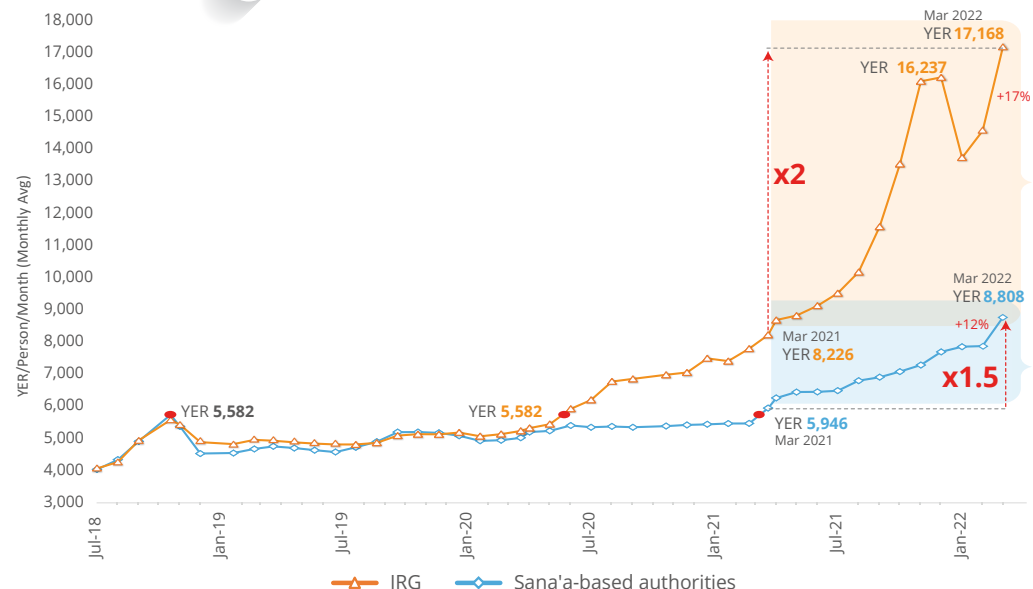
Between the last week of December 2021 and end of March 2022, the cost of MFB increased the most in Ta'iz (up by 72 percent), Abyan (up by 66 percent) and Ma'rib (up by 44 percent), where it reached more than YER 18,300 for these governorates at the end of Q1-2022.

Minimum Food Basket (MFB) in areas under control of Sana'a-based authorities: The monthly average cost of the MFB gradually increased since Q1-2021 and witnessed a sharp rise of 12 percent between February and March 2022, representing the largest month-on-month increase during the past three years in the north. The cost of MFB reached an all-time high of YER 8,808 during March 2022; one-and-a-half times the cost in March 2021 and almost four times its pre-crisis level.

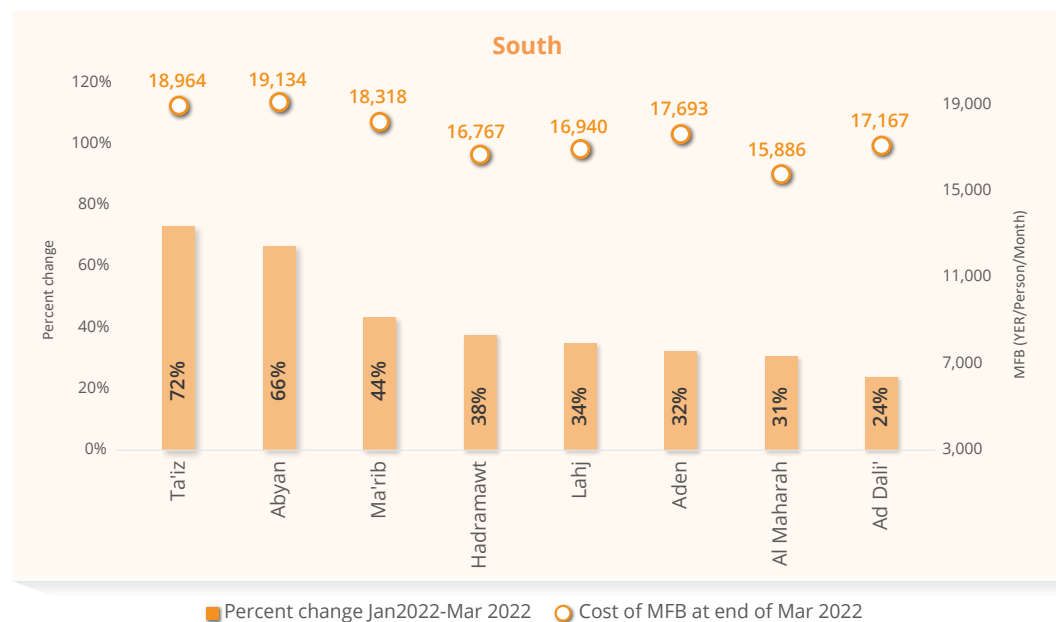
Food prices were affected by the intensified shortage of fuel and increasing fuel prices in the north. The prices of locally produced crops and vegetables have reportedly increased due to high transportation costs³⁷. This was further exacerbated by the continued rise in global food prices and hampered exports in the wake of the Ukraine-Russia conflict.

At the governorate level, the largest increase in the cost of MFB during Q1-2022 was observed in Al Mahwit (up by 37 percent) and Hajjah (up by 28 percent), the latter has pockets of population living in famine like conditions during the first half of 2022.

The cost of the minimum food basket (MFB)

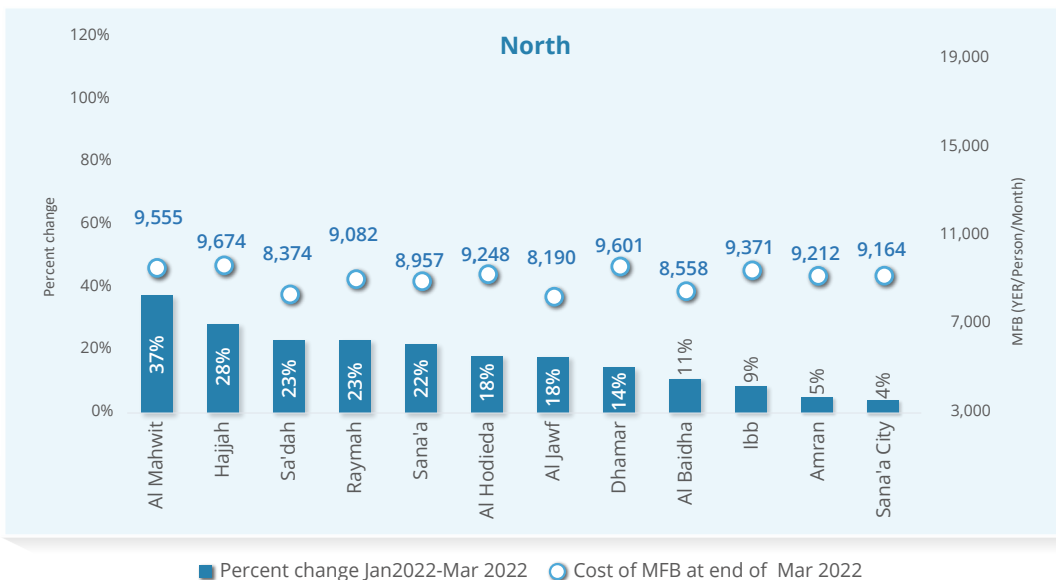


The cost of the minimum food basket (MFB) in March 2022, by governorate



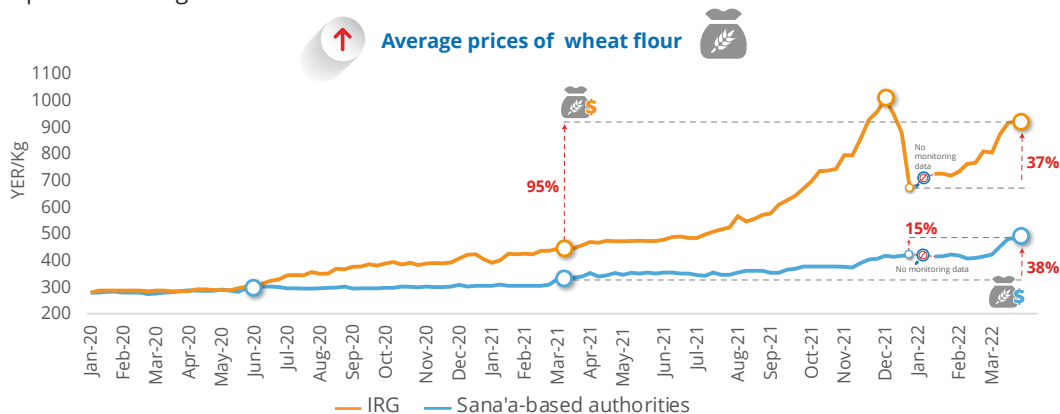
³⁵ UN calls for more support for Yemen after high-level pledging event: <https://reliefweb.int/report/yemen/yemen-humanitarian-update-issue-3-march-2022-enar>
³⁶ Average monthly cost of the MFB/Person/Month.
³⁷ FEWSNET Yemen: <https://fews.net/east-africa/yemen/key-message-update/january-2022>

The cost of the minimum food basket (MFB) in March 2022, by governorate

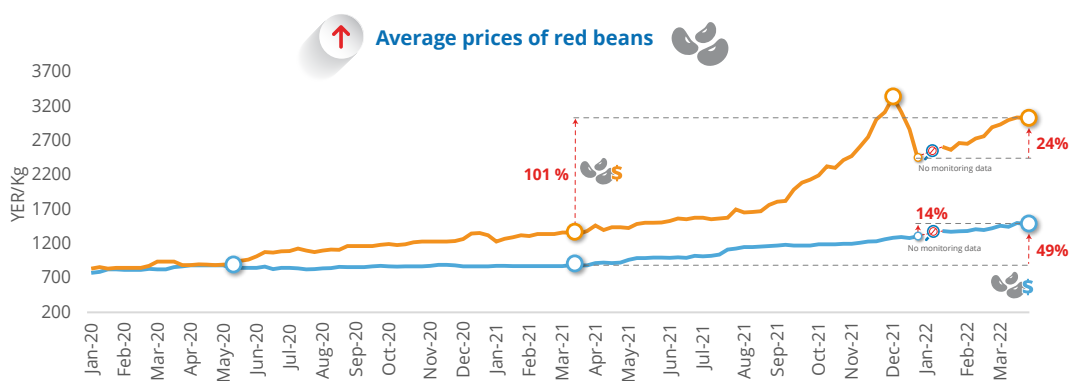
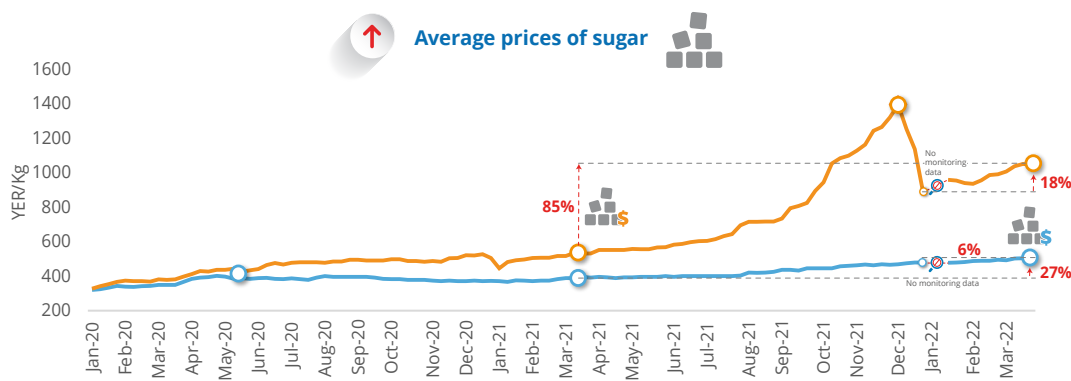
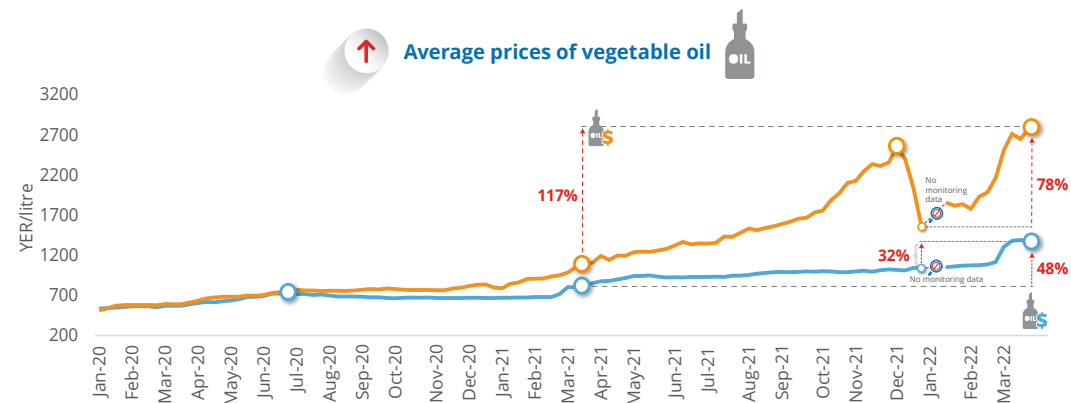


• **Prices of essential food items:** The prices of essential food items continued to increase during Q1-2022 following a brief decrease observed in the last three weeks of December 2021. The price of wheat flour – the main staple food for Yemenis - increased by 37 percent during Q1-2022, reaching almost double the price recorded last year in areas under IRG. At the same time, in areas under Sana'a-based authorities, wheat flour prices increased by 15 percent during Q1-2022 and by 38 percent year-on-year. The year-on-year increase in the price of wheat flour is concerning nationwide, given that it is daily consumed by most Yemeni families.

A similar upward trend was also observed across areas under IRG control for the prices of vegetable oil, red beans and sugar which increased by 78, 24 and 18 percent respectively in Q1-2022 compared to Q4-2021. Moreover, in areas under Sana'a-based authorities, the prices of these commodities have increased during Q1-2022 by 32 percent for vegetable oil, 14 percent for red beans and by six percent for sugar.



The substantial increase in the average prices of vegetable oil is associated with the increase in global prices; the FAO Global Vegetable Oil Price Index increased by 34 percent during January-March and reached its highest level since 2011. This is largely due to the Ukraine-Russia conflict as Ukraine is a key producer and supplier of sunflower oil.



C. Household Access to Food³⁸

Food insecurity reached critical levels in Yemen and remains persistently high during Q1-2022. Half of the surveyed households during March were unable to meet their minimum food needs, indicating that the country reached the worst nationwide levels of food insecurity since 2018. Food insecurity in areas under Sana'a-based authorities was subject to rapid deterioration during March and converged to the prevalent levels of food insecurity in IRG-controlled areas. The deterioration in household ability to access adequate food is a direct outcome of dwindling purchasing capacity and the combined impact of the protracted conflict, the ongoing macroeconomic crisis, fuel shortages, lost livelihoods, and the reduction in humanitarian assistance.

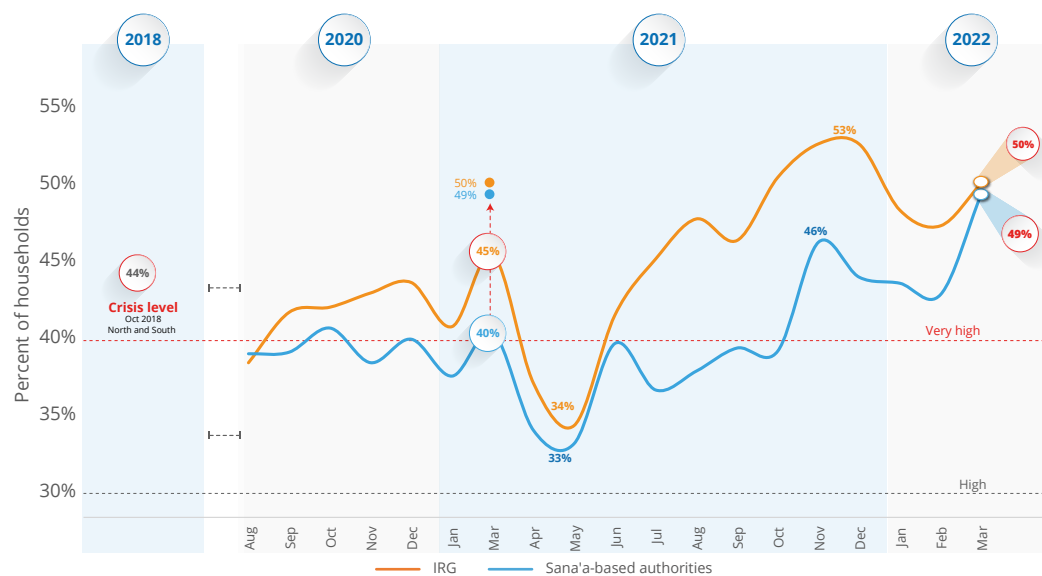
Inadequate food consumption

The proportion of households lacking access to adequate food reached 50 percent in March 2022, which is 19 percent higher than March 2021 and six percent higher than Q4 2021.

Food insecurity was equally high in areas under IRG and Sana'a-based authorities, however it's important to note that the latter witnessed significant deterioration compared to Q4 2021 (11 percent increase), while inadequate food consumption decreased by 6 percent in areas under IRG.

At the governorate level, 17 out of the 22 governorates in Yemen reported “very high” prevalence of inadequate food consumption during March 2022 (≥40 percent of interviewed households). The peak was recorded in Al Bayda (72 percent), followed by Lahj, Ad Dhali', Shabwah, Ibb and Raymah where approximately two-thirds of the surveyed households indicated that they are lacking access to adequate food in March 2022.

Inadequate food consumption by region



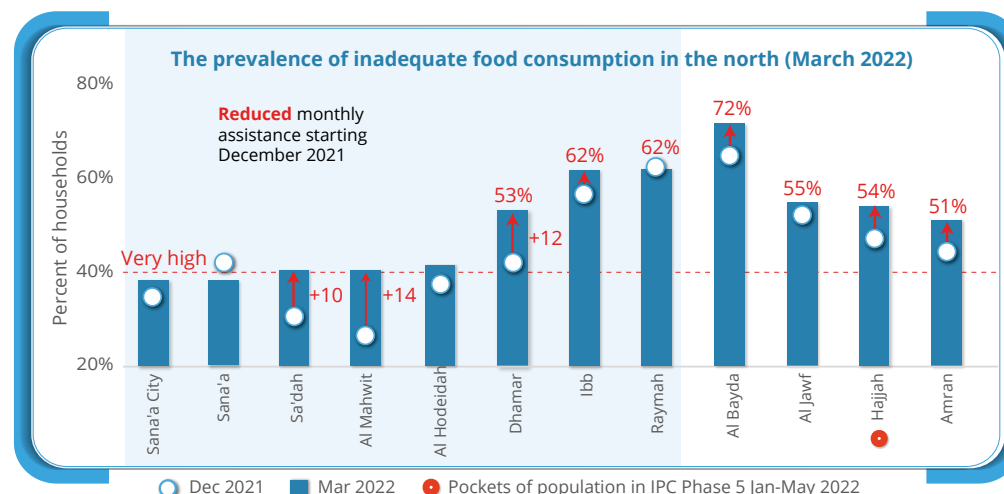
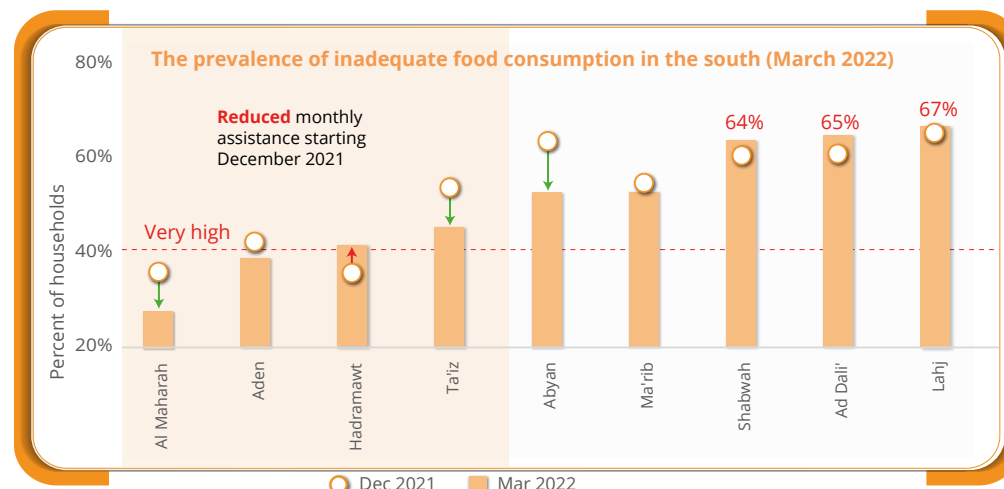
³⁸ Data source: WFP Yemen mVAM

³⁹ Data source: WFP Yemen mVAM

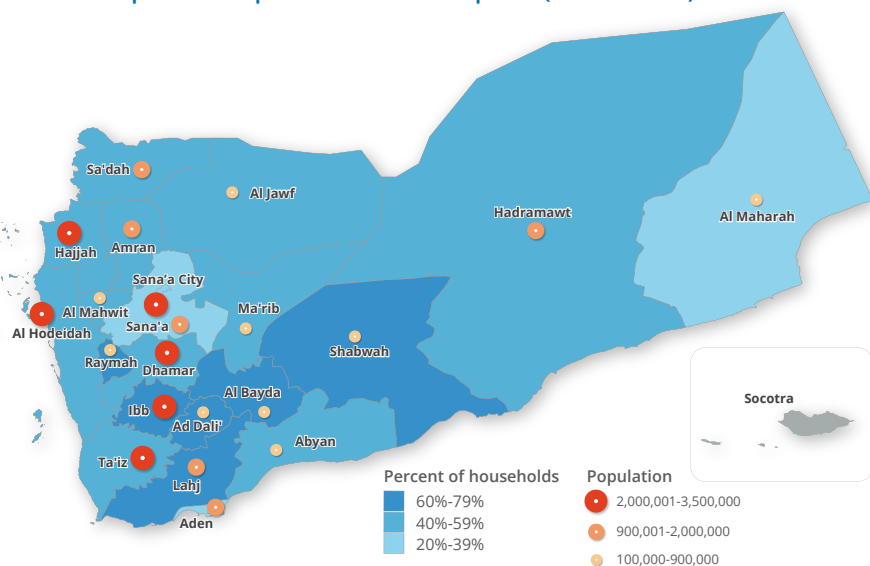
The largest increase in the share of households with inadequate food consumption was observed in the northern governorates with peaks recorded in Al Mahwit (up by 53 percent), Sa'dah (up by 31 percent) and Dahmar (up by 27 percent). Meanwhile, food insecurity in most of the southern governorates plateaued at their corresponding high levels in Q4 2021.

It is important to note that the magnitude of food insecurity increased during Q1-2022 in some of the most population-dense governorates like Dahmar and Hajjah; the slightest change in these governorates has an amplified impact on the overall humanitarian needs across the country.

The ongoing economic crisis was the most frequently reported challenge³⁹, limiting household access to food. Around 44 percent of the surveyed households reported unemployment and reduced wages as the principal factor limiting their ability to adequately consume food, while soaring food prices was the second most challenging shock.



Map 1: Inadequate food consumption (March 2022)



Poor food consumption

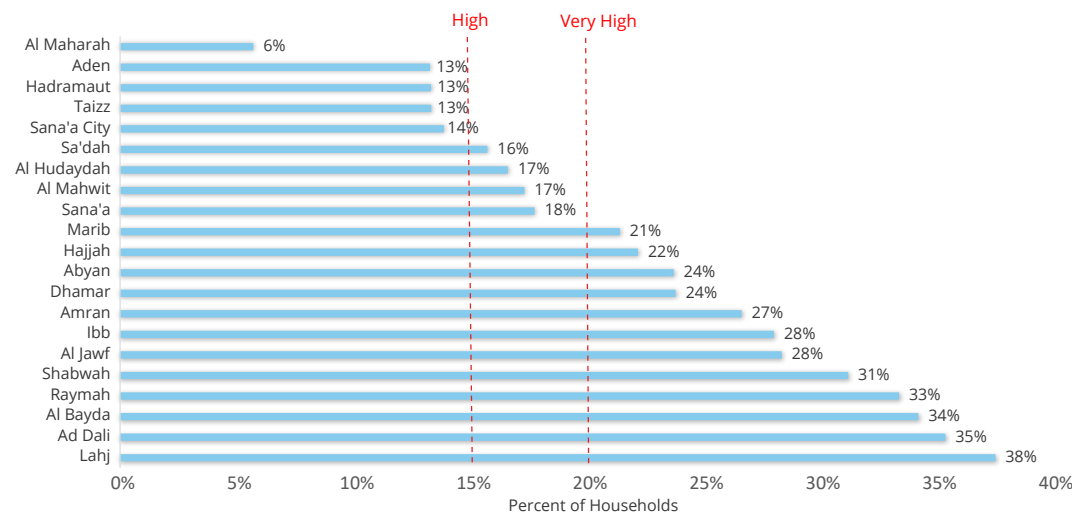
Poor food consumption (households with severe food consumption gaps) increased to 21 percent in March 2022 and reached an all time-high since 2018. This represents an increase of 12 percent during Q1-2022 compared to Q4-2021 and around 50 percent year-on-year, outlining the dire deprivation experienced by households countrywide.

The proportion of surveyed households indicating poor food consumption was higher in areas under Sana'a-based authorities (22 percent), marking a 60 percent increase compared to the year before. At the same time, 20 percent of households in IRG areas had poor food consumption, an increase of 37 percent since Q1-2021.

At the governorate level, more than half of the total governorates in Yemen had “very high” prevalence of poor food consumption at the end of Q1-2022 (≥20 percent of interviewed households); the highest was recorded in Lahj (38 percent) followed by Ad Dali’ (35 percent), Al Bayda (34 percent) and Raymah (33 percent).

Moreover, severe food consumption gaps increased in districts with identified pockets of population in IPC phase 5 during January-May 2022 (famine-like conditions)⁴⁰. According to WFP beneficiary monitoring data, 36 percent of households in Abs and Aslam (two of the three districts with pockets of population in IPC phase 5 in Hajjah governorate) had poor food consumption during Q1-2022, indicating an increase of 71 percent and 34 percent respectively compared to the last quarter in 2021. Clashes and armed conflict in these districts led to the disruption of livelihoods and food supplies and resulted in increased displacement and an increase in the number of IDPs living in vulnerable settlements. According to the 2022 IPC results, food insecurity is projected to further deteriorate in Abs, Aslam and Al Maghraba districts, particularly in light of the significant reduction of humanitarian food assistance during 2022.

Poor food consumption by governorate (March 2022)

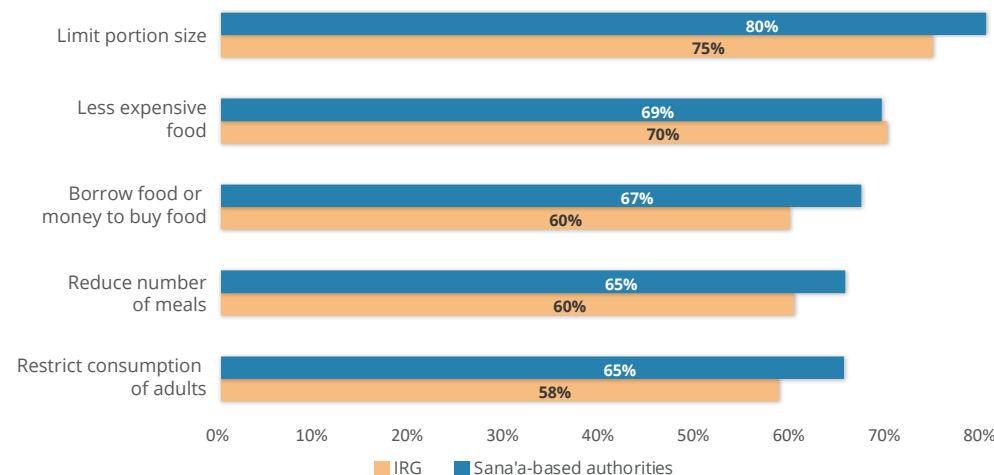


Food-based coping strategies

Yemeni households remained heavily dependent on food-based coping strategies during Q1 2022; nine out of every ten surveyed households (92 percent) applied at least one food-based coping mechanism during the first quarter of 2022.

Overall, the reduced Coping Strategy Index (rCSI)⁴¹ - which reflects the stress level a household is facing when exposed to food shortage - increased by eight percent compared to Q4-2021, and reached a value of 21.6 in March.

Households reporting food-based coping strategies (March 2022)



⁴⁰ IPC Yemen issued in March 2022

⁴¹ The reduced Coping Strategy Index (rCSI) measures the stress level a household is facing when exposed to food shortage

The increasing food prices and the further erosion of households' purchasing power played a key role in pushing more people to rely on food-based coping mechanisms. Nearly four in every five Yemeni households indicated limiting the size of consumed meals and more than two-thirds of the respondents relied on less preferred or less expensive food. In addition, approximately three in every five households reported reducing food consumption by adult members to prioritize their children's food consumption needs. This is considered the most severe implemented strategy to cope with food shortages.

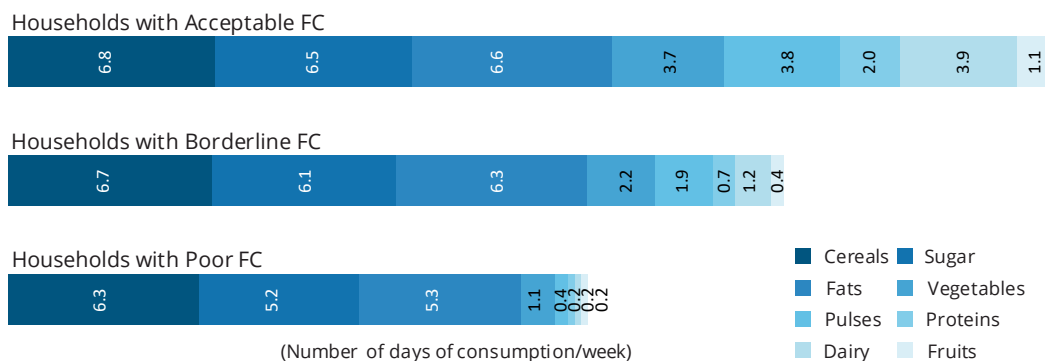
In addition to the above, more households are coping by depleting their livelihoods to cover basic needs⁴². According to mVAM data, one in every five households in Yemen indicated relying on food assistance as a main source of food during March 2022. Moreover, 35 percent of respondents relied on borrowing to cope with insufficient access to food. The over-reliance on negative livelihood coping strategies reduces household resilience and the ability to withstand future shocks⁴³.

Dietary diversity

The increased prevalence of inadequate food consumption and the heavy reliance on negative coping strategies were associated with worsening dietary diversity. The continued increase in food prices and the very high reliance on food assistance and negative food-coping strategies have pushed many families to compromise the quality and diversity of the food they eat.

While the majority of Yemenis currently rely on less diversified diets, household reporting poor food consumption tend to survive merely on calories from cereals, fats and sugars, and a very low intake

Food consumption patterns



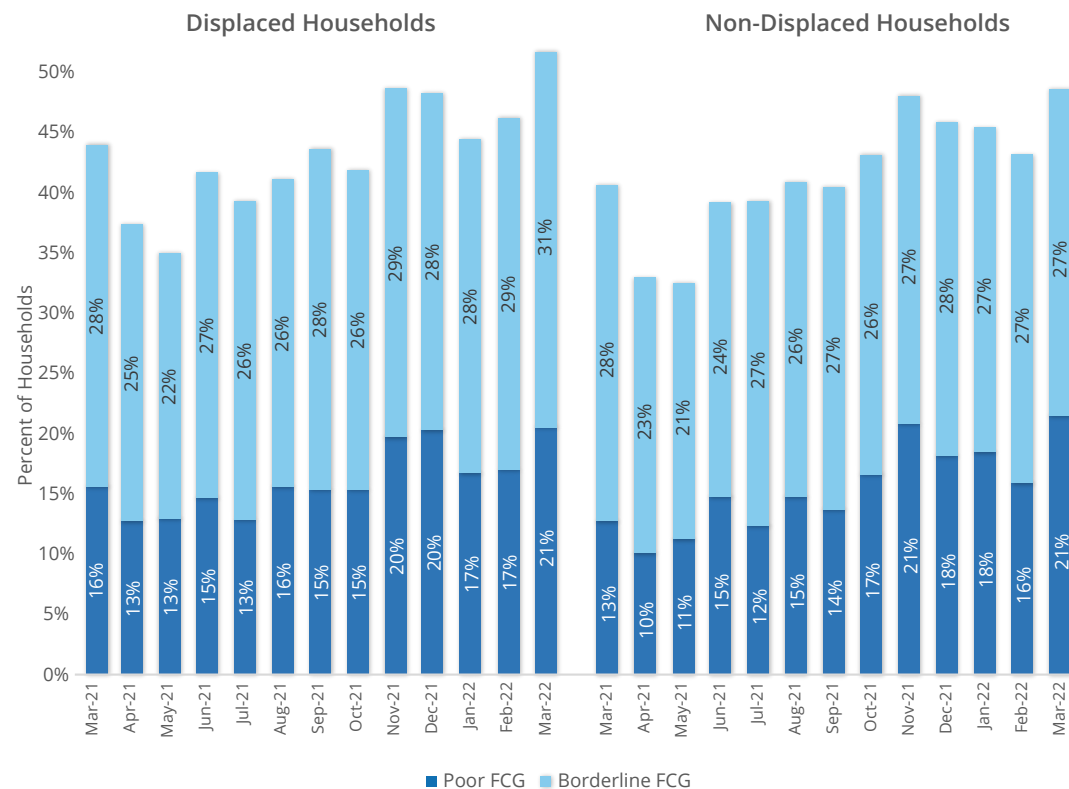
of fruits, vegetables and protein-rich foods. According to mVAM data, on average, these households consumed vegetables merely one day a week, pulses once every two weeks and hardly consumed any meat, dairy or fruits at all. These findings are also validated by the qualitative analysis conducted by ACAPS⁴⁴ "studied households had changed their food consumption by reducing the quantity of non-staple foods (such as meat, eggs, vegetables, dairy products and fruit), resulting in less nutritious diets for household".

Access to food for Internal Displaced People (IDPs)

According to OCHA, 4.3 million people are internally displaced (IDPs) in Yemen, about half of whom are women⁴⁵. IDPs continued to face dire living conditions, with almost 2.6 million are highly food insecure⁴⁶ and around 56 percent of all displaced Yemenis have no source of income at all⁴⁷. According to UNHCR data, these findings are concerning, given that displaced families are four times more susceptible to food deprivation than the rest of population⁴⁸.

Furthermore, mVAM data revealed that more than half of the interviewed IDPs in March 2021 (52 percent) reported inadequate food consumption, representing an increase of eight percent during Q1-2022 compared to Q4-2021 and 18 percent increase compared to Q1-2021. Furthermore, 21 percent of IDPs had poor food consumption and 96 percent adopted at least one food-based coping strategy.

Poor and borderline consumption (by displacement status)



⁴² IPC Yemen issued in March 2022
⁴³ IPC Yemen issued in March 2022
⁴⁴ ACAPS: https://www.acaps.org/sites/acaps/files/products/files/20220522_acaps_yemen_analysis_hub_coping_strategies_0.pdf
⁴⁵ IPC Yemen issued in March 2022
⁴⁶ UNHCR Yemen | 2022 strategy and action plan: <https://reliefweb.int/sites/reliefweb.int/files/resources/UNHCR%20Yemen%202022%20Strategy%20and%20Action%20Plan.pdf>
⁴⁷ UNHCR Yemen | Rapid Needs and Vulnerability Assessment: <https://reliefweb.int/report/yemen/unhcr-yemen-rapid-needs-and-vulnerability-assessment-update-1-jan-2021-31-dec-2021>
⁴⁸ UNHCR Yemen: <https://www.unhcr.org/yemen-emergency.html?query=yemen>



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