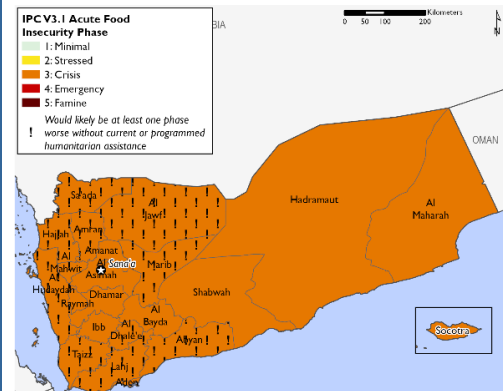


*Emergency (IPC Phase 4) outcomes expected in four governorates amid cuts to food assistance*

**KEY MESSAGES**

- Due to inadequate funds, WFP has announced further significant reductions to emergency food assistance levels in Yemen, with all beneficiaries now expected to receive only 50 percent rations in the coming months. Although Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes are expected to remain widespread, more severe Emergency (IPC Phase 4) outcomes are now expected to emerge in Hajjah, Marib, Lahj, and Abyan during the agricultural off-season from August to October. In these governorates, concurrent reductions in household purchasing power, seasonally limited access to food and income in lowland areas, and reductions in food assistance will leave many households with large food consumption gaps or compel them to use emergency coping strategies. By November, most of these areas will likely see improvement back to Crisis! (IPC Phase 3!), based on the assumption that the start of the harvest of cereals and fruits/vegetables will provide an increase in food and income sources for many poor households. However, Emergency (IPC Phase 4) will likely persist in Marib through January, given the significant number of displaced households who are highly dependent on humanitarian assistance.

Current food security outcomes, June 2022

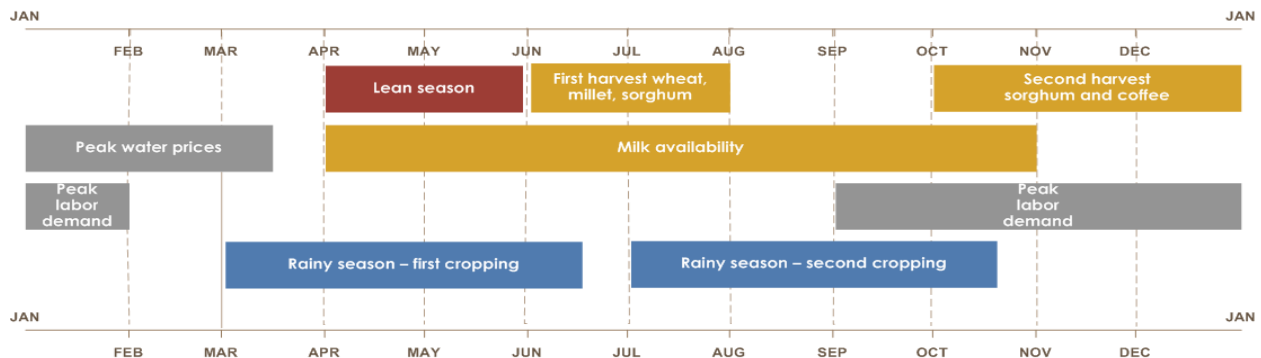


Source: FEWS NET

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.

- Despite a recent reduction in levels of conflict, income-earning opportunities remain highly limited in Yemen and household purchasing power continues to decline as prices of food and essential non-food commodities rise further. Yemen is highly dependent on imports for its food supply and previously sourced a significant share of its staple wheat from Ukraine. Since the invasion, traders have struggled to source wheat from alternative suppliers. In IRG-controlled areas, stocks are reportedly running low. Some periods of localized shortages are likely in the coming three months before additional supply arrives.
- High global fuel and food prices, disruptions to imported food commodity supply chains as traders struggle to source wheat from alternative suppliers, and depreciation of the currency in IRG-controlled areas drove the local price of basic food commodities upward in both IRG- and SBA-controlled areas in June 2022 after a slight decline in late April and May. [According to FAO price data](#), the average price of imported wheat flour was 30 percent higher in June 2022 than the same time last year in SBA-controlled areas and 61 percent higher than the same time last year in IRG-controlled areas.

**SEASONAL CALENDAR FOR A TYPICAL YEAR**



Source: FEWS NET

## NATIONAL OVERVIEW

### Current Situation

A UN-mediated truce began on April 2, 2022, and was [extended](#) for an additional two months on June 2. Despite ongoing ceasefire violations alleged by both parties—especially in contested battlefield areas—levels of conflict have declined significantly to reach the lowest levels recorded since the beginning of the conflict in 2015. According to data from [ACLED](#), a total 1,341 incidents of armed clashes, air/drone strikes, and shelling/artillery/missile attacks were recorded during the ceasefire period from April 2 to June 30, 2022. This represents a reduction of 15 percent in incidents compared to pre-truce period from January 1 to April 1, 2022, and is 32 percent below the five-year average for the period. However, the number of shelling incidents during the truce period has been higher than in the same time period of most recent years (Figure 1), likely due to greater emphasis on ground fighting while airstrikes and cross-border attacks have effectively halted. Additionally, as of late June, there has been an increase in fatalities due to artillery and landmines in several parts of Taizz city, Marib, and Al Bayda, compared to the pre-truce period.

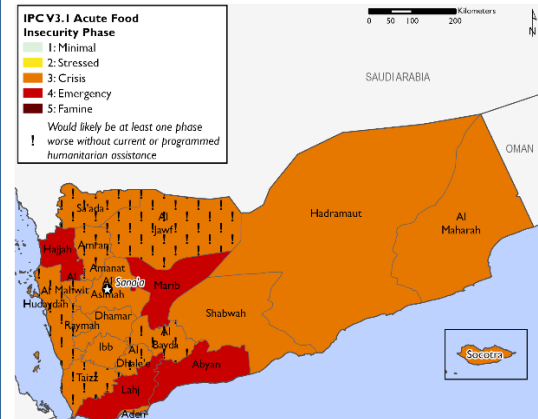
As a result of overall declining levels of conflict, humanitarian access has improved, with previously hard-to-reach districts in the frontline areas of Marib, Hajjah, Taizz, Al Hudaydah, and Sa’adah now relatively more accessible to partners for humanitarian assistance delivery. However, as of the end of June 2022, the main road from Aden to Taizz city via Al Hawban remains closed. Though an important truce condition, the UN special envoy’s proposal for its re-opening was rejected by the Sana’a-based authorities (SBA). Meanwhile, the alternative routes proposed by the SBA have been rejected by the Internationally-recognized government (IRG) and are not viable routes that would impact the movement of people and goods.

The truce has enabled direct dialogue between the Kingdom of Saudi Arabia (KSA) and SBA authorities in Oman. As a result of the talks, the Saudi-led coalition is permitting a greater number of fuel tankers to berth and unload in Al Hudaydah seaport, notably improving fuel supply in SBA-controlled areas. Additionally, the Sana’a Airport was reopened on [May 16, 2022](#), and it was announced on June 26 that the [Ataq airport](#) in Shabwah was ready to receive humanitarian flights. Those able to travel can now access specialized medical care in Jordan or Egypt, and the resumption of commercial flight activity from Sana’a to Amman and Cairo has generated revenue for SBA authorities.

The ceasefire has resulted in a reduction in conflict-driven displacement. According to the IOM, [4,950](#) households were newly displaced due to conflict across monitored governorates in the first quarter of 2022. In the second quarter of 2022, from the beginning of the truce period in April through June 25, 2022, a total of [1,943](#) households were displaced, 61 percent less than in the first quarter. Most displacement was due to shelling and insecurity in hotspot areas (Figure 2). According to the IOM, the main needs of newly displaced households are shelter, financial support, and food assistance. Meanwhile, since the beginning of the year, improved security conditions in the border area between Marib (Harib) and Shabwah (Usaylan, Al-Ain, and Bayhan) have allowed around [1,148](#) households to return to their districts of origin as of June 11.

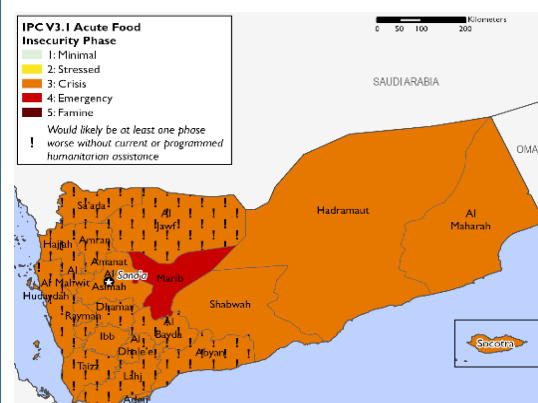
Despite the recent reduction in conflict, macroeconomic conditions in Yemen remain poor overall given the impacts of more than seven years of protracted conflict on economic and business activity. Shortages of government revenue continue to lead to insufficient provision of public services and disruptions to payment (delays or non-payment) of civil servant salaries. Levels

Projected food security outcomes, June to September 2022



Source: FEWS NET

Projected food security outcomes, October 2022 to January 2023



Source: FEWS NET

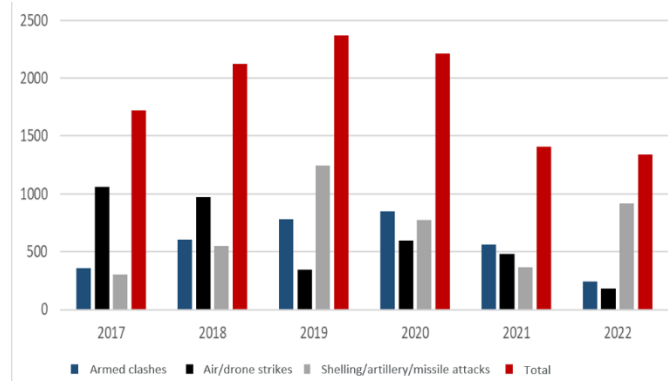
FEWS NET classification is [IPC-compatible](#). IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

of foreign exchange reserves remain low—contributing to depreciation of the currency in IRG-controlled areas—and are dependent on periodic large international financial deposits. On June 30, 2022, the head of recently appointed Presidential Leadership Council (PLC) and the KSA’s deputy Minister of Defense agreed on a plan to expedite the delivery of 600 million USD of the 3 billion USD Gulf financial support package pledged in early April, according to national media outlets. A total 400 million USD will reportedly be provided to support seventeen development projects implemented by the Saudi Development and Reconstruction Programme Yemen (SDRPY), including in the sectors of energy, transportation, education, water, health, and building state institutions, with majority of these intervention in Aden. A further 200 million USD will provide oil derivatives for the operation of power stations in IRG-controlled areas.

On February 13, 2022, the Central Bank of Yemen (CBY) in Aden raised the amount of foreign currency auctioned per week from 15 million to 20 million USD per week in order to better meet traders’ demand for hard currency in light of global price increases, and in turn reduce demand on the local market and support the value of the local currency. On May 19, the weekly auction amount was further increased to 30 million USD. By mid-June, the CBY raised the amount of currency that banks could request from 25 percent to 30 percent of the total auction amount. Despite these efforts, the currency in IRG-controlled areas has generally continued to depreciate. As of June 2022, the local currency in Aden had lost almost 9 percent of its value against the USD compared to May 2022 and was valued 17 percent less than the same time period of the previous year according to data from FAO (Figure 3). Meanwhile, in Amanat Al Asimah (Sana’a city), the value of the local currency has remained stable since a slight appreciation in mid-April.

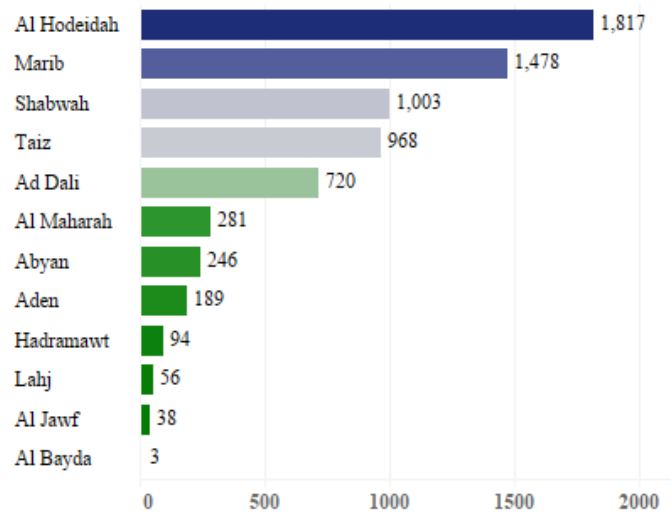
After more than a year of reduced fuel import levels and resultant fuel shortages in SBA-controlled areas due to the Saudi-led coalition’s blockade of the Red Sea ports, fuel import levels through the ports of Al Hudaydah and As Salif notably increased in April and May (Figure 4) alongside a provision of the ceasefire allowing the discharge of 18 fuel vessels. As a result, fuel availability in SBA areas has significantly improved since April. With fuel now generally widely available at official stations, households and businesses in SBA-controlled areas can now purchase fuel at lower official prices (in contrast to higher commercial prices or parallel market prices), with positive impacts on livelihoods dependent on fuel (such as in agriculture or transportation) and exerting some downward pressure on prices of food and essential non-food commodities.

**Figure 1.** Number of violent events in the April 2 to June 30 period, 2017-2022



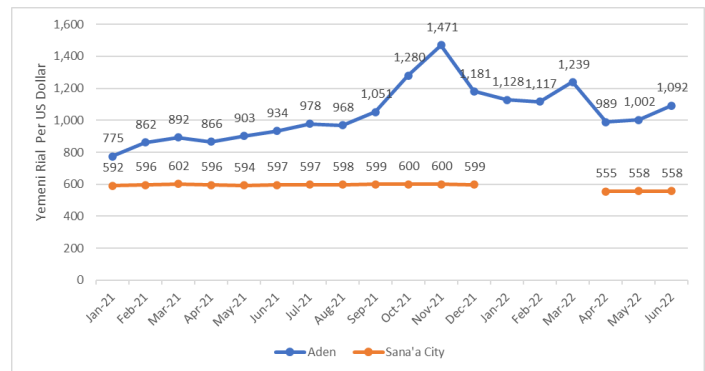
Source: FEWS NET using data from ACLED

**Figure 2.** Total number of households newly displaced from January to June 25, 2022 in IOM monitored governorates



Source: IOM

**Figure 3.** Exchange rate (YER/USD) in the key reference markets of Aden and Sana’a city, January 2021 to June 2022



Source: FEWS NET using data from FAO

Meanwhile, in IRG-controlled areas, fuel prices continue to fluctuate in large part due to exchange rate volatility. On average in June 2022, petrol prices at official fuel stations were 4 percent higher than in May, 127 percent higher than the same time of the previous year, and 228 percent higher than the three-year average. Meanwhile, official diesel prices in IRG-controlled areas declined slightly by 9 percent but were 76 percent higher than the previous year according to data from FAO. As of June 23, 2022, petrol prices in Aden increased by 14 percent at commercial fuel stations, while fuel prices in official stations remained unchanged and sold at 19,800 YER/20L, though with long queues. Petrol prices at the Taizz commercial fuel station recorded prices as high as 29,000 YER/20L, which is higher than prices in neighboring Aden by a significant 12 percent. High prices of fuel are contributing to rising food prices and other living costs. Also, in IRG areas, lack of fuel has caused prolonged periods of electricity outages and further disruptions to the delivery of basic public services.

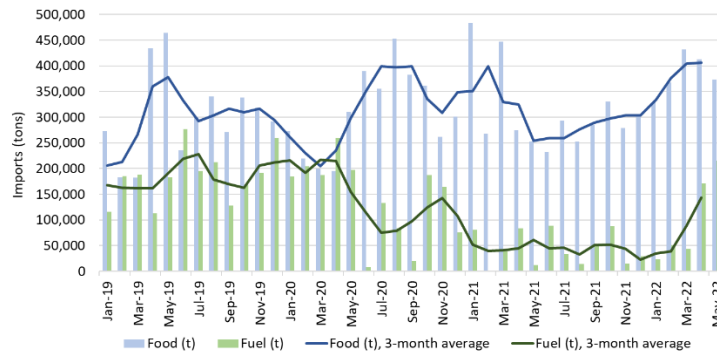
Yemen has been severely impacted by the Russian invasion of Ukraine due to the country’s heavy reliance on wheat imports from Ukraine and Russia, which together

previously supplied 42 percent of Yemen’s annual domestic requirements. Since the invasion, traders have struggled to source wheat from alternative suppliers given high competition for limited available global supply, with comparatively smaller traders who supply IRG-controlled areas worst-affected. Stocks are reportedly running low in IRG-controlled areas.

Monthly food import levels through the Red Sea Ports have been generally increasing in recent months. From January to May 2022, a total 373,000 MT of basic food commodities were imported through Al Hudaydah and As Salif ports, which is 11 percent higher than in the same period of 2021, likely due to improved import processes facilitated by the truce. Meanwhile, food imports through Aden ports from January to May 2022 were 44 percent less than in the same period in the previous year, with notable reductions in January and February. However, import levels are typically volatile, and these patterns are similar to those recorded in 2020.

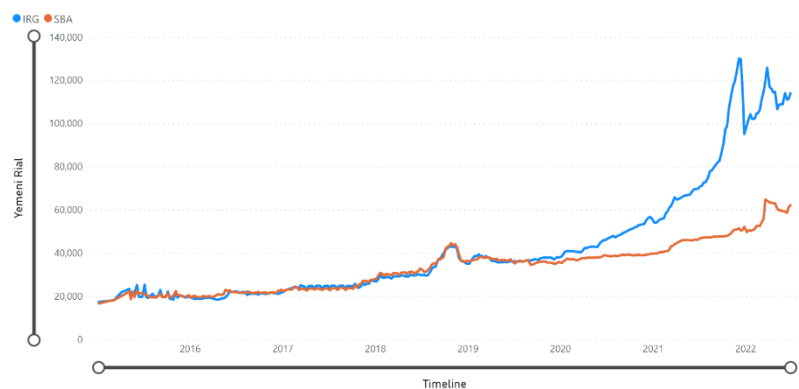
Driven by high global prices of fuel and food, disruptions to importation supply chains as traders struggle to source wheat from alternative suppliers, and, in IRG-controlled areas, depreciation of the currency, prices of basic food commodities have continued to increase in both IRG- and SBA-controlled areas in June 2022, after slight recovery in late April and May 2022 (Figure 5). IRG-controlled areas remain worst-affected by food price increases, due mainly to depreciation of the currency, though fuel price increases in 2022 have put additional upward pressure on food prices across Yemen due to high transportation costs. According to data from FAO, average prices of staple wheat flour (imported) in IRG-controlled areas rose by 9 percent from May to June 2022 though remained 4 percent lower than March 2022 prices which had skyrocketed in response to the Ukraine crisis. Still, wheat prices remain at levels around 507 percent higher than in February 2015 (pre-crisis). The worst-affected governorates over the past six months have been Marib, Shabwah, and Al Dhale’e, where prices have increased significantly since the beginning of 2022. In SBA-controlled areas, prices of food have been increasing more gradually over the past six months, driven primarily by rising food and fuel prices globally. Average prices of wheat flour in SBA areas remained stable in June 2022, after a recorded 14 percent increase in March 2022. Nonetheless, wheat flour prices in June 2022 remain at levels 30 percent higher than in June 2021 according to data from FAO.

**Figure 4.** Food and fuel imports through the Red Sea Ports, January 2019 to May 2022



Source: FEWS NET using data from UNVIM

**Figure 5.** Cost of the minimum food basket, January 2015 to June 2022



Source: FAO

To cope with food price spikes, available information suggests that many poor households in areas such as Hadhramaut are limiting use of cooking oil, using low-quality rice and fish, or switching from rice to bread, while better-off households have stopped donating money to beggars due to distrust and an overwhelming number of beggars visiting their homes and businesses, forcing some poor families out onto the street to beg.

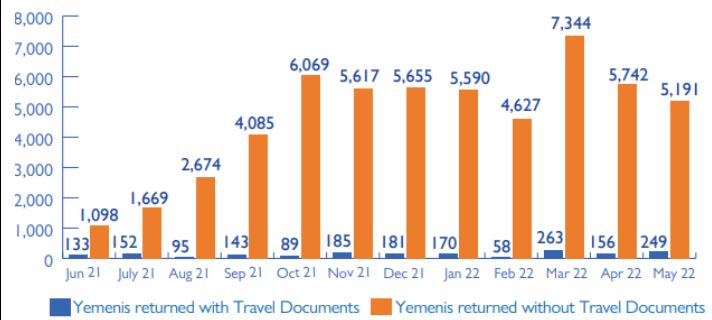
Despite some recent improvement in economic and business activity due to reduced levels of conflict and, in SBA-controlled areas, improved fuel availability, income-earning opportunities remain highly limited given overall very poor economic conditions. Though labor wages have generally been increasing over the past year due to inflation, they have not been sufficiently adjusted to keep up with rapidly rising food prices, and availability of labor opportunities is highly limited. In June 2022, purchasing power for laborers in IRG-controlled areas as measured by the terms of trade (a ratio) between wheat flour prices and wage rates was 8 percent below levels recorded at the same time last year for agricultural laborers, 21 percent below last year for unskilled laborers, and 23 percent below last year for semi-skilled laborers. In SBA-controlled areas, purchasing power for laborers in June was 11 percent below last year for agricultural laborers, 13 percent below last year for unskilled laborers, and 15 percent below last year for semi-skilled laborers. Additionally, households dependent on government salaries and continue to suffer from inflation as salaries have not been adjusted over time.

Foreign remittances provide an important source of foreign exchange and hard currency to Yemen’s economy. However, as Saudi Arabia has tightened its labor policies over time, many Yemeni workers have become unable to fulfill the requirements associated with formal employment, including high costs of obtaining or renewing residential papers or work visas. This has resulted in more migrant workers returning to Yemen. As of May 2022, around 29,390 Yemeni migrants had returned since January 2022, the majority of whom had entered Yemen without travel documentation (Figure 6). Given this, foreign remittance inflows to Yemen have likely declined, increasing the financial burden on households reliant on remittances as a main source of income. The increase in the number of migrant workers returning from Saudi Arabia is also expected to be increasing competition for limited job opportunities in Yemen.

Cumulative rainfall in Yemen’s first rainy season from March to May was below average across most of the country, with deficits of as much as 25-50 mm recorded over widespread highland areas and with deficits reaching 50-100 mm in some highland areas, according to data from CHIRPS. Given this and above-average temperatures, vegetation conditions were below average across widespread highland areas as of late June 2022 (Figure 7).

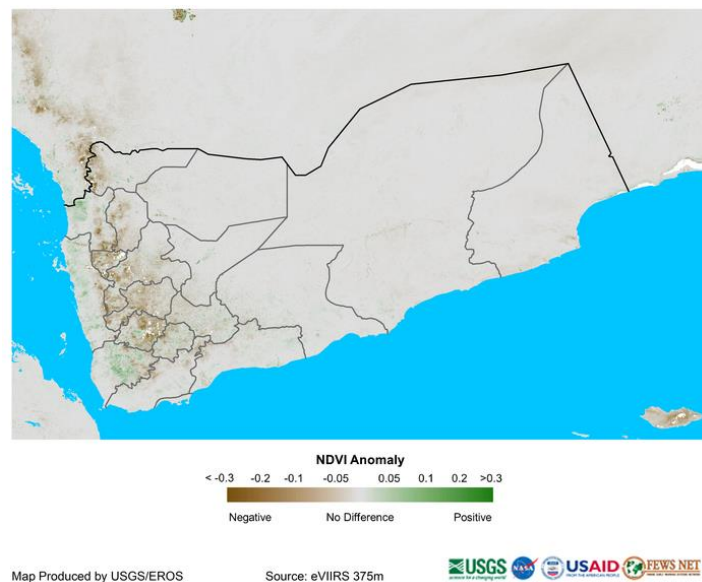
Rising prices of agricultural inputs including fuel and fertilizer are forcing many farmers to reduce the amount of land that they cultivate. Prices of NPK and urea fertilizers in June 2022 were 49 percent and 88 percent higher, respectively, than the same time last year in IRG areas and 46 percent and 10 percent higher, respectively, than the same time last year in SBA areas, according to data from FAO. Additionally, below-average precipitation likely increased reliance on groundwater for irrigation in the recent season, with farmers dependent on diesel pumps expected to be facing reduced profit margins due to above-average fuel prices. Similarly, driven by rising costs associated with livestock holding, the cost of ploughing has

**Figure 6.** Number of returning Yemeni migrant workers, monthly, Jun 2021 to May 2022



Source: IOM

**Figure 7.** Normalized difference vegetation index (NDVI), anomalies, June 21-30, 2022, compared to 2012-2021 average



Source: USGS/EROS

increased significantly across most governorates over the past year. In June 2022, the cost of ploughing (draft animal per day) in worst-affected Taizz governorate was 62 percent higher than the same time last year, followed by 42 percent and 23 percent higher, respectively, in Al Mahwit and Ibb, according to data from FAO.

In southern Yemen along the Gulf of Aden coast, isolated adult locusts were reported in a few places during the beginning of the rainy season, with [no control operations required](#). Locust presence has diminished in Yemen since March, attributed in large part to moisture deficits persisting across most of the country.

While risk of flooding is normally highest during the first rainy season, below-average precipitation and the absence of heavy rains from March through May resulted in very little flooding. However, in late April when most rain was received, flooding impacted some areas including [Marib](#), where two displacement camp structures were severely impacted, affecting 100 households. Meanwhile, [five civilians](#) were reportedly killed in the north and west of Yemen, including in Amanat al Asimah.

In coastal areas and the eastern plateau, harvesting of spring cereals is beginning. In highland areas, summer cereal cultivation is nearing conclusion, and the winter cereal harvest has concluded recently. This is likely temporarily improving food access for farming households. Also in highland areas, harvesting of grapes and year-round qat harvesting is likely providing some labor opportunities for poor households. However, due to high prices of inputs and below-average rainfall, reduced crop production levels in some areas have likely resulted in reduced access to income for many poor households who typically rely on daily wages from agricultural labor and non-agricultural labor throughout the broader marketing chain. Additionally, in coastal areas, income from fishing activities remains below average as frontline coastal areas are restricted military zones and remain inaccessible despite the ongoing truce.

Though pasture conditions are expected to have seasonally improved in the eastern plateau and coastal areas, persistently high prices of animal feed, fuel, and veterinary medicine are increasing livestock production costs and are driving some pastoralist households to sell their livestock to avoid accumulating losses, according to key informants. In particular, prices of dry fodder have risen sharply in IRG areas. In Al Dhale'e and Taizz, the price of imported mixed fodder in June 2022 was three times higher than the same time last year. In Hadramout valley and Dhamar, the price was 143 percent and 155 percent higher, respectively.

Pastoralism is more prominent in its contribution to local livelihoods in regions along the Tihama Plain (Hajjah and Al Hudaydah), Hadramout, Marib, and Al Jawf. In June 2022, livestock prices remained high or have further increased in most governorates since their typical peak around the Ramadan and Eid al-Fitr holidays (this year in April and May), except for in Al Mahwit where prices of one-year-old sheep dropped slightly in June, according to data from FAO. Hajjah recorded the greatest increase in prices from May to June, of 34 percent. Prices of sheep and goats have likely continued to increase at the national level due to high inflation and rising costs of livestock farming.

According to the [WHO](#), a total 886,664 people age 18 and above have been fully vaccinated against COVID-19 as of May 12, 2022. This represents only 6 percent of the population and is very far from the 70 percent minimum vaccination coverage required to achieve adequate country-wide protection against COVID-19. According to the Supreme National Emergency Committee for Coronavirus, COVID-19 spread has been in continuous decline since April 2021. Meanwhile, all COVID-19 restrictions remain lifted, including at border points. Several vaccination campaigns continue to operate in the southern governorates, though interest in vaccination among the population is low.

According to the [Food Security and Agriculture Cluster \(FSAC\)](#), 11.3 million individuals (around 35 percent of the total population) across Yemen were assisted with emergency food assistance in April 2022. However, 58 percent of beneficiaries received rations that provided less than 50 percent of their total kilocalorie needs. In May 2022, only 7.5 million individuals (around 24 percent of the population) were assisted. Of these, 55 percent were assisted with rations that provided less than 50 percent of their total kilocalorie needs. Additionally, according to recent key informant reports, many beneficiaries have been reached less frequently than planned throughout 2022 due to funding constraints, though precise information is limited. On June 27, 2022, [WFP](#) announced significant reductions in food assistance such that all 13 million beneficiaries will now receive less than 50 percent or even around 25 percent of their total energy requirements (depending on the assessed severity of food insecurity) in WFP's fourth food distribution cycle from June to August. These ration reductions have been mainly due to funding shortages and high food prices. The Yemen Humanitarian Response Plan for 2022 was only [27.2 percent funded](#) as of June 30, 2022, due to limited donor contributions in light of high humanitarian needs worldwide.

Due to years of conflict, limited access to basic health services, poor sanitation infrastructure and hygiene practices, outbreaks of diarrhea and other illnesses, and poor food consumption, high rates of acute malnutrition likely persist in many parts of

Yemen. According to a 2021 nutrition SMART survey, the prevalence of Global Acute Malnutrition (GAM) among children under five remained very high in surveyed areas, particularly in the lowlands of Abyan, Taizz, Hajjah and Al Hudaydah, where the GAM rate was above 15 percent (“Serious” levels according to WHO thresholds). According to the nutrition cluster, a total 965,058 children under five have been screened for malnutrition since the beginning of the year. The outpatient Severe Acute Malnutrition (SAM) admissions rate among children 6-59 months from January to March 2022 remained slightly below levels recorded in the previous two years and significantly below levels recorded in 2019. However, more recently, SAM admissions rates in May 2022 have risen above levels recorded in the past two years. Below-average crop production in rural areas, rising food prices, and cuts to humanitarian food assistance are likely contributing to worsening food consumption and increased rates of malnutrition in worst-affected areas.

Many rural households are likely currently benefiting from some limited seasonal support from income-earning associated with land preparation activities in highland areas and food from the recently concluded cereal harvest in lowland areas. However, given highly limited income-earning opportunities and rising prices, household purchasing power is declining further, with even middle-income and better-off households facing constrained ability to meet their needs. Additionally, in rural areas across the country, some have been forced to abandon income-generating activities that require travel beyond their immediate area due to high fuel prices and transportation costs. Given reduced humanitarian assistance provision, many poor households are likely engaging in severe non-traditional coping strategies and/or are likely facing widening food consumption gaps. In worst-affected areas such as in Al Hudaydah, Hajjah, Abyan, and Lahj, an increasing number of households are expected to be engaging in extreme coping strategies including theft, begging, and collecting plastic and metal waste to sell. Overall, millions are likely facing consumption gaps, with Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes widespread at the area level. Highest concern exists for those households more dependent on humanitarian assistance for food in both urban and rural areas, with an increasing number who have experienced assistance reductions likely to be facing Emergency (IPC Phase 4) or worse outcomes.

### Assumptions

The most likely scenario for the June 2022 to January 2023 period is based on the following national-level assumptions:

- Given the benefits that both parties to the conflict are experiencing under the ceasefire and its [extension](#) in June, it is considered most likely for this analysis that the ceasefire will continue to be extended during the projection period, though uncertainty exists (see events that may change the scenario). As such, levels of **conflict** are expected to remain similar to the reduced levels recorded in the ceasefire period to date. The frontlines of Marib, Sa’adah, Al Dhale’e, Taizz, Hajjah, Al Jawf, and Al Hudaydah will likely be worst affected by violations, mostly in the form of shelling and drone strikes. Though some progress toward implementing the remaining provisions of the ceasefire is expected during the projection period, full implementation of the ceasefire provisions will likely require time, and major commercial routes connecting the south and north are expected to remain closed for the majority of the projection period.
- Given the absence of meaningful steps by the PLC to address growing economic concerns and expectations for rising prices, increasing levels of **civil unrest** are anticipated in the summer months across IRG areas, and are likely to reach levels similar to what was observed from June to August 2021.
- Given expectations for conflict, **humanitarian access** will likely remain similar to current improved levels, though some access constraints due to bureaucratic impediments, ongoing ground fighting, and civil insecurity are expected to persist. Some delays and disruptions to humanitarian assistance delivery are likely due to funding shortages and some disruptions to WFP commodity procurement.
- Oil production levels in 2022 are expected to be slightly higher than in 2021 but below pre-conflict levels. Given expectations for continued significantly elevated global oil prices, **government revenue and foreign exchange earnings from oil exports** are expected to surpass last year’s levels but remain below pre-conflict levels due to reduced production.
- Given the extension of the previous financial deposit from the KSA (including 174 million USD to the Central Bank of Yemen in Aden) alongside expectations for oil revenue, **the CBY’s foreign reserve levels** will likely remain low but sufficient to sustain the currency auction mechanism during the projection period. Given that the provision of the remaining un-allocated 2.4 billion of the 3 billion USD Gulf financial assistance package is conditioned on reforms

that will take time to implement, receipt of the funds by the CBY is no longer anticipated during the projection period.

- Given expectations for sustained reduced levels of conflict and improved fuel availability in SBA-controlled areas, some improvement in **economic and business activity** is anticipated during the projection period. However, income earning opportunities will likely remain below pre-crisis level of 2015. Given this, expectations for government revenue, and the likelihood that authorities will continue to be unable to meaningfully intervene to support the economy or control currency markets, macroeconomic conditions are expected to remain poor overall. In IRG-controlled areas, the **value of the YER** will likely remain volatile but is expected to continue to depreciate overall during the projection period given expectations for foreign exchange and absence of government controls, reaching levels between 1,000 and 1,200 YER/USD by January 2023, though significant uncertainty exists. In SBA-controlled areas, the value of the YER is expected to remain generally stable and close to current levels.
- Given reduced exports from Ukraine, Yemeni traders will likely continue to seek to import a significant share of staple goods—particularly wheat grain—from limited alternative suppliers at higher global prices. Though supply of foreign currency through the CBY's auction mechanism is expected to be sufficient to finance imports, traders are expected to face difficulty procuring the required quantities of wheat due to the higher prices and export bans by wheat producer countries. **Import levels of staple wheat and vegetable oil** are expected to be lower than the same period of last year, and the variety and quality of **imported foods** is expected to continue to reduce overall given the reduced availability of suppliers, high prices, and limited government capacity to control food quality.
- Comparatively smaller traders supplying IRG-controlled areas are likely to face the greatest importation challenges in light of high global competition for available supplies, high global prices, and the continuous local currency depreciation. Given this and declining stocks, **periods of localized shortages of staple wheat flour and vegetable oil** are likely in IRG-controlled areas in the July to September period. However, **supply and availability of wheat** is expected to improve following the distribution of 500,000 MT of wheat grain expected to arrive in the coming three months. This will likely be sufficient to prevent shortages of wheat throughout the remainder of the projection period. In SBA-controlled areas staple foods including wheat grains/flour is expected to be available during the projection period.
- Given the assumed further ceasefire extensions, **fuel imports** through the Red Sea ports are expected to continue at higher levels than the previous year, and fuel is expected to remain generally available at official and commercial stations in both IRG- and SBA-controlled areas.
- In IRG-controlled areas, **fuel prices** are likely to fluctuate alongside the exchange rate but are expected to increase overall throughout the projection period given expectations for currency depreciation and continued high global energy prices. Meanwhile, in SBA-controlled areas, given improved fuel availability, fuel prices are expected to remain relatively similar to current levels, though increases alongside rising global prices remain possible.
- Given expectations for continued elevated global food prices, continued elevated fuel prices and transportation costs, and, in IRG-controlled areas, depreciation of the currency, **staple food prices** are expected to increase overall throughout the projection period, with IRG-controlled areas worst affected. In IRG-controlled areas, given these factors and anticipated significantly reduced wheat supply in the near term, prices of staple wheat flour (imported) are expected to increase rapidly in the near term, reaching levels up to 50 percent higher than current prices and double prices recorded last year in the reference market of Aden, though significant uncertainty exists. Through prices may decline with improved supply anticipated alongside the 500,000 tons of wheat expected in the next three months, any declines are expected to be minimal based on historical patterns and anticipated continued uncertainty about future supplies, with staple wheat flour prices expected to remain high throughout the projection period. Meanwhile, in SBA-controlled areas, prices of staple wheat flour (imported) are expected to increase overall throughout the projection period, averaging over 60 percent higher than the previous year in the reference market of Sana'a city market.
- Due to limited donor funding and high global food assistance needs, beneficiaries of **emergency humanitarian food assistance** are likely to receive monthly assistance at reduced rations equivalent to approximately 50 percent of households' energy needs, though uncertainty exists in WFP's plans.



- Income from **foreign remittances** will likely remain below levels recorded before late 2019/early 2020 due to restrictive Saudi labor policies and the return of many Yemeni workers due to lack of legal working papers, continuous increase of visa fees, and *Kafil* (sponsorship) requirements.
- Income from **domestic remittances** will likely continue to decline due to declining purchasing power among Yemenis across wealth groups. Households in SBA areas that rely on remittances from IRG areas are expected to remain the worst affected due to the widening gap in exchange rates and associated high transfer fees.
- According to international forecasts, **cumulative rainfall** during Yemen's second rainy season from July to October is expected to be **significantly above average**. Given this, risk of flooding is expected to be above average, with western lowland areas most at risk.
- Due to forecast below-average sea surface temperatures, **risk of cyclone strikes** and associated flooding for Socotra and the southern Aden Gulf coast is expected to be below average during the peak period from October to December 2022. Normal low risk is expected in January 2023.
- **Risk of water- and vector-borne diseases** such as cholera, malaria, and dengue, are expected to be elevated during Yemen's second rainy season (in association with flooding) and in areas where active conflict threatens infrastructure linked to water and sanitation.
- Despite expectations for rainfall and improved fuel availability, **food crop production in 2022** is expected to be similar to last year and below pre-crisis levels given the long-term impacts of protracted conflict on Yemen's agricultural sector, including due to above-average prices of inputs and fuel, resulting in reduced area cultivated. However, **income from crop sales** and from activities along the marketing chain will likely be slightly higher than last year given improved fuel availability and expectations for reduced conflict which will allow for better marketing. However, these incomes will likely remain below pre-crisis levels.
- **Harvesting of qat** is expected year-round in higher elevation areas. *Qat* production is expected to be near average given prioritization of this cash crop with respect to irrigation resources and this will provide an income source for some farmers.
- Current widespread below-average **vegetation conditions** across most of Yemen's highlands are likely to persist into the June dry season. From July to September, pasture conditions are expected to improve given forecast above-average rainfall, reaching average to above-average conditions. From October to January 2023, pasture conditions are expected to deteriorate, as is typical, reaching near average conditions.
- Slight improvement in **livestock body conditions** is expected in the July to September period alongside improved pasture availability, especially in highlands and eastern areas. Livestock prices are expected to increase in the beginning of the first projection period national wide prior to Eid Al Adha in mid-July, increasing access to income from livestock sales.
- Income from **fishing** in the Red Sea is expected to improve seasonally in the July to October period before declining again during the windy season from November to February. Meanwhile, income from fishing in the Arabian Sea is expected to reduce from July to September due to the windy season—with Socotra highly impacted—before improving seasonally in the October to January period. Overall, income from fishing will likely remain below pre-conflict levels due to significantly above-average fuel prices, restricted access to military areas, and lack of cold chain especially during summer season with long period of electricity outages.
- In lowland areas, demand for **agricultural labor** is expected to decline to seasonally low levels during the July to November dry season and increase following that alongside the main harvest of cereals and the onset of the fruit and vegetable production season. In highland areas, demand for agricultural labor is generally expected to increase throughout the projection period, particularly during the main fruit and vegetable production season from June to December. Some improvement in income-earning along agricultural production and marketing chains is expected in the projection period due to reduced conflict and improved fuel availability. Though wages are also expected to increase in many areas due to inflation, the real value of income from labor is expected to remain stable or decrease and remain below average.

- The September to November **cereal harvest** in highland areas will slightly improve availability food from own production, with stocks expected to last for around two to three months. In the Arabian coast and eastern plateau, the June to July sorghum and millet harvest will likely provide food stocks lasting up to two months. In the Tihama Plain, the main November to December sorghum and millet harvest will likely provide food stocks lasting for around three months.
- **Income from government salaries and pensions** is expected to remain similar to recent years and below pre-conflict levels. Given lack of progress in negotiations regarding this provision of the ceasefire, delays and non-payment are expected to continue, with military and security forces in IRG areas and government employees more broadly in SBA areas likely to continue receiving payments intermittently.
- WFP has announced that it will reduce the number of beneficiaries of **resilience and livelihood activities and school feeding and nutrition programs** from 4 million to 1.8 million people. However, uncertainty exists as plans for these priority activities could change with receipt of additional funding from donors.

### *Most Likely Food Security Outcomes*

In rural areas, food from the recently concluded winter cereal harvest in the highlands and the ongoing spring cereal harvests in the lowlands is expected to temporarily increase many rural households' access to food from own production, though contribution to total food needs will be limited and stocks are expected to last for a maximum of two months. In lowland areas, availability of food and income is expected to seasonally decline through November and will slightly improve again from December to February with the harvest of cereals in December and the harvest of vegetables in the December to February period. In highland areas, availability of food and income is expected to seasonally increase throughout the majority of the projection period. Above-average rainfall during the second rainy season will likely support some increase in farmers' profits due to reduced irrigation costs. However, above-average rainfall is also likely to cause crop losses (due to flooding or rotting), reducing income from crop sales and also resulting in high prices of locally produced crops in worst-affected areas.

Significantly reduced humanitarian assistance is expected to result in widening consumption gaps for many households and further reduce sharing practices among the poor, with highest concern for beneficiaries whose main source of food and income was assistance. Throughout the projection period, purchasing power is expected to decline due to rising prices. Overall, poor households' capacity to access food from markets—the key food source for most—will be lower than the same period of last year and significantly below pre-conflict levels throughout the projection period. Increases in nominal income are expected to be insufficient to keep up with the rising costs of essential food and non-food commodities, even for households who benefit from the recent slight improvement in economic and business activity due to reduced levels of conflict and improved fuel availability in SBA-controlled areas (such as those working in small business and skilled wage workers). However, in general, ability to expand income-earning is expected to be limited. In southern IRG-controlled areas worst affected by price increases and declining purchasing power, an increasing number of poor households are likely to face consumption gaps or widening consumption gaps as they exhaust available coping strategies and will likely be forced to engage in more non-traditional coping strategies such as theft and sending children to collect plastic.

Most areas of western Yemen are expected to remain in Crisis (IPC Phase 3) or Crisis (IPC Phase 3!) throughout the projection period. However, with the recent further reductions in humanitarian food assistance, Emergency (IPC Phase 4) outcomes are expected in Hajjah, Marib, Lahj, and Abyan—where more than 50 percent of the population receive assistance—in the August to October period when seasonal access to food and income from other sources is also low due to the dry and agriculture off season. Beginning in November, access to food and income will seasonally improve with the start of the harvest, improving area-level food security outcomes to Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) for many poor households. However, Emergency (IPC Phase 4) outcomes are expected to persist in Marib at the area level given the significant number of displaced households who are highly dependent on humanitarian assistance.

Meanwhile, in Socotra, given the start of the windy monsoon season, high food prices and low incomes are expected in the June to September period, reducing access to food and income from fishing and increasing the number of households facing Crisis (IPC Phase 3) or worse outcomes.

Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario:

Area	Event	Impact on food security outcomes
IRG-controlled areas	Food import levels fall dramatically	A significant reduction in commercial food imports would be expected to reduce food availability in many areas, particularly in areas under IRG-control as stocks of wheat grain and/or flour are already largely depleted. This would result in further food price increases and would be expected to result in an increase in the number of households facing Emergency (IPC Phase 4) in areas where food availability is significantly reduced.
National	No extension of the ceasefire beyond August	Conflict would likely re-intensify, disrupting livelihoods and eroding any gains in economic and business activity and in humanitarian access made during the ceasefire period. More households would likely be displaced or re-displaced, particularly in active frontline areas in Marib, Taizz, and Al Dhale'e. This would further reduce households' ability to cope with rising prices and assistance reductions, and a greater-than-anticipated number of households would likely face consumption gaps or widening consumption gaps and Crisis (IPC Phase 3), Crisis! (IPC Phase 3!), Emergency (IPC Phase 4), or worse outcomes during the projection period, particularly prior to the start of the harvest in the lowlands around November/December.

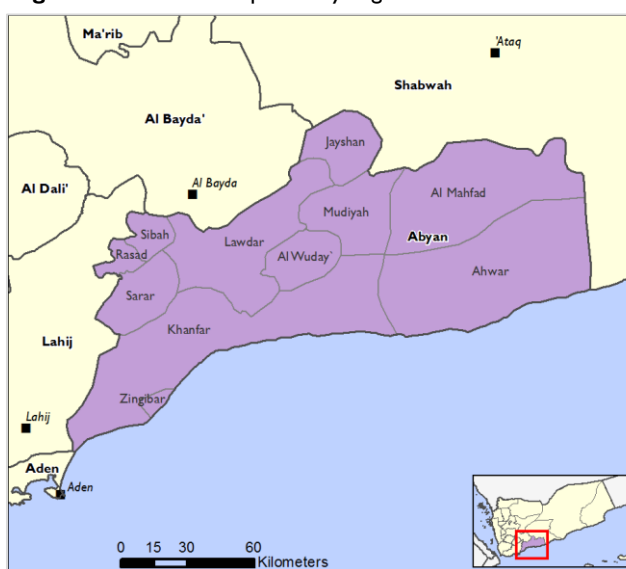
AREAS OF CONCERN

**Abyan Governorate**

*Current Situation*

Abyan governorate is located in the southern part of Yemen. It has a diverse landscape including mountains (highlands) in the north and the coastal plain in the south. There are also several valleys (wadis), the most prominent of which is Wadi Bana that flows into the Abyan Delta which is among the most fertile area in Yemen. The governorate's economy depends highly on agriculture, livestock, and fisheries. According to key informants in March 2022, the occupation of more than half of the governorate's households' primary income-earner is either "government employee" or "laborer" (Figure 9). While government salaries are a main source of income for many households in both urban and rural areas, herding labor and casual labor are the most important income sources for poor rural and displaced households, in addition to income from own crop production for more than 10 percent. Despite the importance of agriculture to the economy, most households depend heavily on markets to access their food. Own crop production has a very limited contribution to households' total food consumption and many poor households have limited access to land. It is important to note that Abyan is among the poorest governorates in the country, with high levels of chronic food insecurity.

Figure 8. Reference map for Abyan governorate

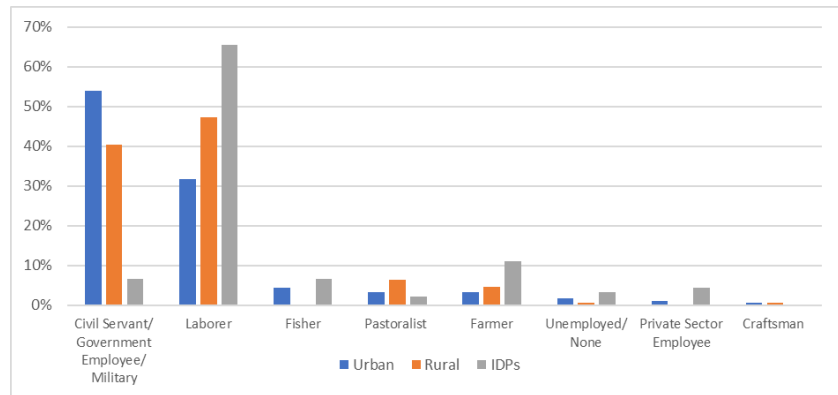


Source: FEWS NET

The security situation in Abyan has deteriorated since early 2011 when Ansar El Sharia (an armed group affiliated with Al Qaeda) strengthened their presence in Abyan. In 2022, Modyah and Al Mahfad districts have been most affected by attacks

on government army forces. In response, the IRG and STC coordinated their efforts and in June launched a security operation to fight and expel Al-Qaeda from Abyan. Although there is no active ground fighting in Abyan, the situation remains fragile and tensions between IRG and STC groups renew from time to time. Despite the relative improvement in the security situation, re-activation of Ansar El Sharia attacks and the growing tensions between IRG and STC forces has interrupted the livelihoods of many poor households, especially in areas that continue to be impacted by insecurity such as Lawdar, Al Mahfad, and Zingibar.

**Figure 9.** Occupation of households’ primary income-earner, estimated proportion of total households in Abyan



Source: FEWS NET using information from key informants

Fighting in neighbouring governorates (mainly Al Bayda, Taizz, and Al Hudaydah) continues to displace households into Abyan, putting more pressure on already exhausted community resources, though the number of new displacements has declined since the ceasefire. From January 1 to June 15, 2022, around 234 households were newly displaced in Abyan according to IOM, all of whom were reportedly in need of food. As of May 2022, Abyan hosted 3,057 displaced households around (15,030 individuals) according to REACH. Of these, the majority (70.2 percent) were in spontaneous settlements, mainly concentrated in Khanfar, Zingibar, and Lawdar districts, while 28.1 percent were in urban location. Many have been displaced for more than one year and are living in very tough conditions including due to exploitation by employers, particularly among females.

Following slight appreciation from March to April 2022, the local currency depreciated slightly again during May and June. As of June 30, 2022, the value of the local currency was 1 percent lower than in the previous month and 23 percent lower than the same time of the previous year, according to FAO data. This depreciation has been driving food inflation. As of June 2022, the cost of the Minimum Food Basket (MFB) in Abyan was 104,265 YER, representing a 67 percent increase compared to the same time of the previous year, according to data from FAO

Similar to other IRG-controlled areas, Abyan has been impacted by fuel shortages and high prices. As of June 2022, unofficial petrol and official diesel prices (the price series for which data are available) were 1,500 YER/L and 1,344 YER/L, respectively, which is higher by 95 percent and 111 percent, respectively, than the prices in the same time period of the previous year, according to FAO data. Higher fuel prices in Abyan relative to the IRG reference market of Aden are attributed to transportation costs and manipulation by traders in the absence of the government price controls. Additionally, political tensions between the different parties have contributed. In late June, fuel trucks were stopped for several days due to gunmen blocking the main road.

Continuous food price increases are making food more unaffordable for many poor households. On average more than 40 percent of households in both urban and rural areas are expected to be getting their income from government salaries, and many poor households are receiving between 20,000-70,000 YER per month. However, households earning below 50,000 YER per month mainly poor Households will be able only to cover 50 percent of the total MFB cost. Additionally, as of June households earning income from unskilled labor must work for more than 7 days to cover 50 percent of MFB and 14 days to cover the full cost of the MFB cost with selling their wage by a rate of 7083 YER/day, while agriculture wage will require to work more than 9 days to cover 50 percent of MFB and more than 18 days to cover the full cost of the MFB cost with daily wage rate of 5750 YER. Moreover, those dependent on government salaries and or daily wages access income irregularly.

Rainfall during the first rainy season from March to May 2022 was below average. This led to a decrease in flooding needed for irrigation, negatively impacting the livelihoods of many households dependent on agriculture. An estimated 30 percent of cultivated land was damaged by the dry conditions, according to news reports. Many farmers were forced to leave their trees unirrigated and lost their crops. In particular, banana farmers are heavily dependent on floods to irrigate their crops. According to key informants, some farmers who were unable to irrigate their banana trees using alternative irrigation sources—either because they do not have wells or due to high fuel and irrigation costs—burned their banana trees.

Additionally, many farmers were forced to reduce their cultivated land in the recent season due to high production costs, including high [diesel and pesticide prices](#). Due to high production costs, locally produced commodities cost more than imported alternatives, increasing households' reliance on imported food. High fuel prices also increased irrigation and marketing costs, reducing farmers' profit margins. Overall, the poor production season compromised income-earning from crop sales and agricultural labor.

Livestock farming was also impacted by the [below-average rainfall](#), as nature pasture was scarce. Dry fodder prices were 7 percent higher in May 2022 compared to the previous month and 66 percent higher than the same time of the previous year.

Approximately half of the population of Abyan receive regular emergency humanitarian food assistance distributions from FSAC partners. This assistance provides a main source of food for many poor households, and displaced households rely on it heavily. According to information from key informants and [FSAC](#), beneficiaries of emergency humanitarian food assistance in Abyan likely received three distributions of humanitarian assistance from January to May 2022, representing a reduction in frequency from the monthly distributions received throughout 2021. According to FSAC, most beneficiaries received full rations (equivalent to approximately 80 percent of households' energy needs) in April and May 2022. In June, however, the recent reductions announced by WFP likely led to a decline in food assistance. Beneficiary households with relatively more severe food insecurity, based on WFP's assessment, likely received reduced rations providing less than 50 percent of their energy needs, while other households received a ration as low as 25 percent of their energy needs.

To cope with reductions in income, less frequent assistance distributions, and high food prices, many poor households have been forced to engage in more severe and untraditional coping strategies, such as engaging their children in collecting plastic bottles, as options for credit are very limited or no longer available and as traditional strategies are already exhausted. An increasing number of poor households are likely reducing portion sizes and number of meals or engaging more in theft as a last option. According to [WFP](#) monitoring, the percentage of households reporting inadequate food consumption increased by around 15 percentage points from May 2021 to May 2022. More recently, reductions in assistance have likely increased the number of poor households facing consumption gaps or widening consumption gaps, particularly during the current agricultural off season in the lowlands. Crisis! (IPC Phase 3!) outcomes are expected at the area level, and an increasing number of poor households are likely facing Emergency (IPC Phase 4) outcomes.

#### *Assumptions*

In addition to the national assumptions listed above, the most likely scenario for Abyan for June 2022 to January 2023 is based on the following assumptions:

- Political tension and civil insecurity will likely continue near current levels, characterized by sporadic armed clashes between different parties.
- Income from agricultural labor will remain at seasonally low levels during the dry season in the first half of the projection period and will then increase in the second half of the projection period due to the start of the agriculture season including the harvest of cereals and vegetables.
- Income from livestock sales will likely increase due to high demand during Eid Al Adha in July.

#### *Most Likely Food Security Outcomes*

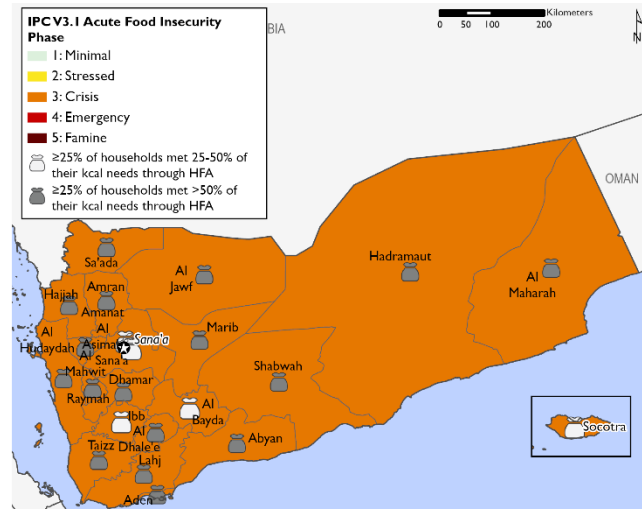
Throughout the projection period, rising prices of food and essential non-food commodities are expected to further reduce household purchasing power. Additionally, access to food and income will remain at seasonally low levels during the remainder of the agricultural off season through around October. Given this and reduced humanitarian assistance rations for a significant share of the population, additional poor households are expected to face food consumption gaps and Crisis (IPC Phase 3) outcomes or widening consumption gaps and Emergency (IPC Phase 4) outcomes, with Emergency (IPC Phase 4) outcomes expected at the area level in the August to October period.

Beginning around November, the agricultural season will increase access to income from labor opportunities. The harvest of cereals is also expected to slightly improve availability of food from own production in the November to January period. Overall, however, given limited access to income and high dependence on markets will continue during this period for most households. Many will likely remain in Crisis (IPC Phase 3), Crisis! (IPC Phase 3!), or Emergency. At the area-level, Crisis! (IPC Phase 3!) outcomes are expected from November 2022 to at least January 2023.

**MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE\***

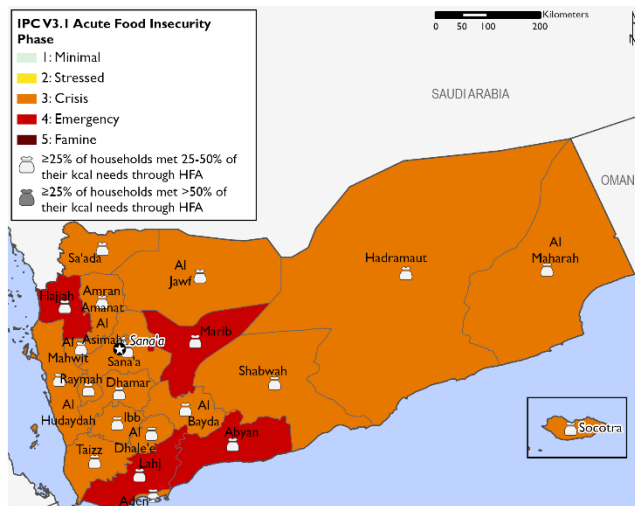
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☹️ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). 🏠 indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

Current, June 2022



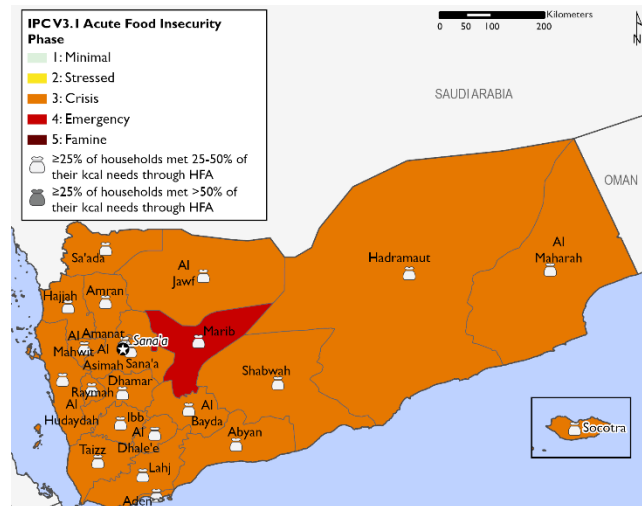
Source: FEWS NET

Projected food security outcomes, June to September 2022



Source: FEWS NET

Projected food security outcomes, October 2022 to January 2023



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.

FEWS NET. *Yemen Food Security Outlook, June 2022 to January 2023. Emergency (IPC Phase 4) outcomes expected in four governorates amid cuts to food assistance.*

**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.](#)