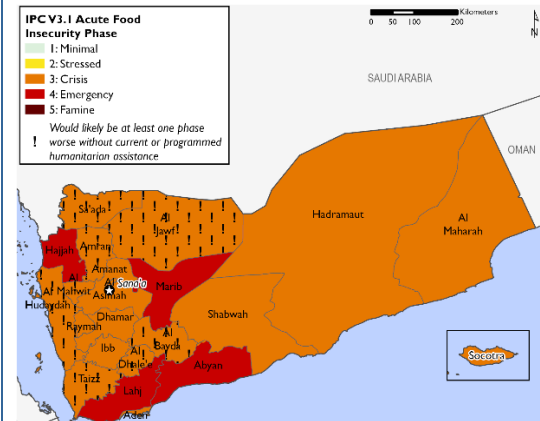


Early season dryness and recent floods exacerbate food insecurity amid reduced assistance

KEY MESSAGES

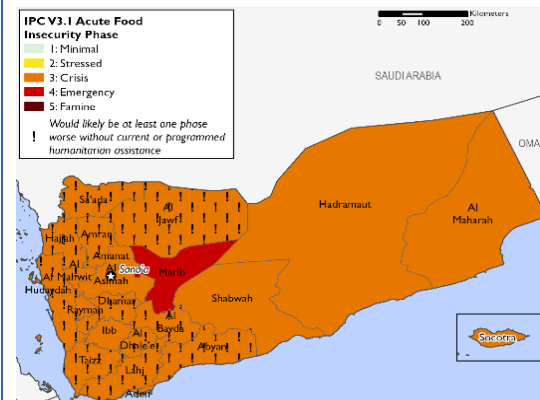
- After abnormal dryness in the March to May first rainy season, heavy rain since mid-July has caused widespread flash flooding across 18 of Yemen’s 22 governorates, resulting in damage to critical infrastructure, homes, productive assets, and food stocks, with displacement sites worst affected. As of August 18, around **36,205 families** had been affected, the majority of whom are in displacement sites. As a result of crop damage, prices of domestically produced foods including vegetables have increased further. Though flooding caused some to miss planting, above-average rainfall in the July to September rainy season is likely to benefit farmers by reducing irrigation costs and improving crop production prospects, particularly in lowland areas.
- Importers have procured additional wheat in August following the resumption of Ukrainian exports. As such, shortages of staple wheat flour are no longer expected during the projection period. Staple wheat flour prices are now expected to remain generally stable overall, though at significantly above-average levels.
- As of August 17, only **42 percent** of the 2022 Yemen Humanitarian Response Plan (YHRP) was funded. Last year, when funding was also a concern, **63 percent** of the YHRP was funded. Continuous funding shortfalls have led the World Food Programme (WFP) to cut rations and reduce the frequency of food assistance distributions for most beneficiary households in 2022. In July, WFP provided emergency food assistance to **7.3 million people** as part of the fourth cycle of distributions in 2022 to date. Nearly all beneficiaries received rations equivalent to **less than 50 percent** of total energy needs.
- The WFP is not currently taking steps to resume monthly assistance distributions, contrary to previously communicated plans. Rather, available information suggests that WFP is engaging local authorities in discussions regarding the continued provision of assistance at recently reduced levels. As such, it is no longer expected that WFP will scale back up to monthly assistance distributions in the projection period. Given the importance of humanitarian assistance for millions of poor households in Yemen—including high dependence among the displaced—millions of households are expected to face food consumption gaps during the projection period despite revised expectations for stable food prices and purchasing power.
- Given expectations for reduced assistance, **Emergency (IPC Phase 4) outcomes** are expected in Hajjah, Marib, Lahj, and Abyan during the agricultural off-season from August to October when access to food and income is seasonally limited. By November, most of these areas will likely see improvement back to **Crisis! (IPC Phase 3!)** given increased availability of food and income with the start of the main harvest. However, **Emergency (IPC Phase 4) outcomes** will likely persist in Marib through January, given the significant population of displaced households who are highly dependent on assistance.

Projected food security outcomes, August 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.

CURRENT SITUATION

Though talks are ongoing, little progress has been made regarding the key remaining provisions of the **ceasefire** that entered into force on April 2, 2022, including the re-opening of main roads—including in Taizz—and the payment of civil servant salaries and pensions. As such, the UN is working to further extend the truce beyond October 2, 2022, when it is set to expire. Additional priorities under the ceasefire include the addition of new international destinations for flights from Sana'a airport and the continued flow of fuel into Al Hudaydah port. In the last week of August, the Sana'a-based Minister of Transport said that new destinations would be introduced, but details were not provided. On the other hand, the Sana'a-based Yemen Petroleum Company (YPC) has accused the Saudi-led coalition of restricting fuel tankers from entering Al Hudaydah port.

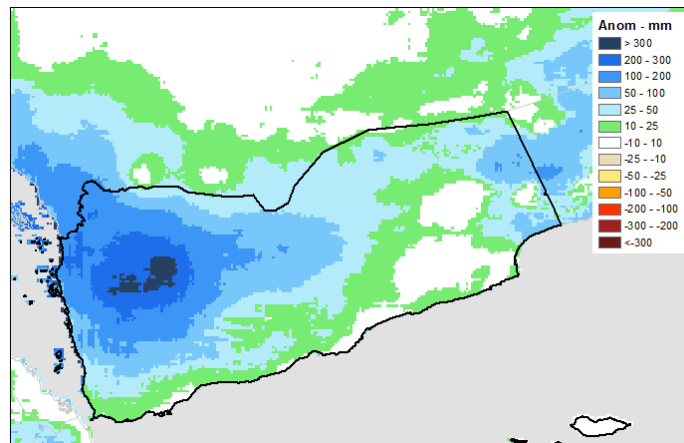
Though levels of **conflict** have reduced overall since the ceasefire entered into force, violations by both sides continue. From July 12 to August 12, 2022, a total 649 conflict events occurred across the country according to [data from ACLED](#). This total is 7.2 percent higher than the monthly average for the past year, driven by a 30 percent increase in the number of incidents of explosions/remote violence (505), while the number of battles (105) was 40.7 percent lower. In the same July 12 to August 12 period, 271 fatalities were recorded across the country, 74.9 percent lower than the monthly average for the past year. However, in the first two weeks of August, intense fighting between factions of the Presidential Leadership Council (PLC) of the internationally recognized government (IRG) in Shabwah led to a 333 percent increase in conflict incidents (from 9 to 39) in the governorate compared to the same period of the previous month.

Most of the country has received atypically heavy **rainfall** since the start of Yemen's second rainy season in July. According to [data from CHIRPS](#), cumulative rainfall totals in July and August exceeded 145 percent of the long-term average across most of the country. The western highlands received the most excess rainfall, with anomalies exceeding 100 mm and even exceeding 300 mm in some areas (Figure 1). As a result of heavy rainfall, widespread flash flooding has damaged or destroyed critical infrastructure (including roads and water sources), homes, crops, and assets (including households' food stocks), and disrupted livelihoods across 18 of Yemen's 22 governorates, with Hajjah, Al Jawf, Al Hudaydah, Amanat Al Asimah (Sana'a city), Amran, Marib, and Sana'a among the hardest hit, according to [OCHA assessments](#). As of August 18, an estimated **36,205 families** had been affected, the majority of whom live in displacement sites and have limited remaining coping capacity.

According to [data from the IOM](#), a total 1,033 households were newly **displaced** from July 1 to August 13, 2022. Of these, 66 percent were displaced due to conflict, 24 percent were displaced due to natural disasters, and 10 percent were displaced for economic reasons. Compared to the same time period of the previous year, the number of displaced households affected by natural disasters (mostly rain and floods) was 63 percent higher. On the other hand, 48 percent fewer people were displaced due to conflict. Conflict in Shabwah led to the highest weekly displacement total in the second week of August 2022 recorded in the country since February 2022. A total of **423 households** (2,538 individuals) were displaced that week, 74 percent of whom were in Shabwah. Since the start of the truce on April 2, a total of **104 households** were able to leave Marib and Marib City and return to their own homes in Harib as of August 7 due to an improvement in the security situation.

According to the [semi-annual report](#) for the first half of 2022 produced by the Central Bank of Yemen (CBY) in Aden, the IRG's general government revenue in the first half of 2022 increased by 352.8 percent compared to the same period of 2021 (Figure 2). Yemen's **economy** is highly dependent on crude oil production and exports, which provide the government with its most important source of revenue. Though the recorded increase is less in real terms given inflation, revenue from crude oil and gas exports—which contributed about half of total revenue in the first half of both 2021 and 2022—even increased by 34 percent when measured in USD, reaching 739.3 million USD in the first half of 2022 (up from 551.7 million USD during the same period of the previous year) (Figure 3). This is attributed to an increase in the amount exported through Balhaf port in Shabwah via the operational [Marib/Al-Nashima pipeline](#) along with high global demand and prices. Revenues from non-oil sources and from taxes/customs also increased following the adoption of market exchange rates (as opposed to subsidized

Figure 1. Cumulative rainfall anomalies (mm), July 1 to August 31, 2022, difference from 1981-2010 average, according to CHIRPS and CHIRPS prelim data



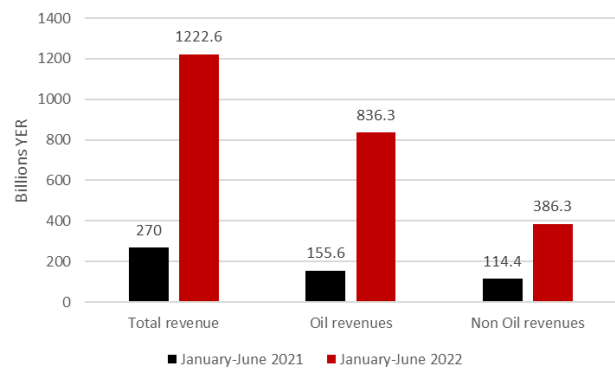
Source: USGS/EROS

exchange rates) in all government operations, including in the oil sector. While the government’s general budget for the first half of 2022 shows a surplus of 120.8 billion YER, the inclusion of deferred expenditures—including for government salary payments, private purchased energy, and other obligations—results in an overall deficit of 44 billion YER.

Over the past year, the CBY in Aden has taken several positive steps to control the **currency market** in IRG-controlled areas, including holding public currency auctions, making the decision to **stop printing new banknotes**, and tightening controls over money exchange shops and commercial banks. As of June 30, 2022, the CBY-Aden had absorbed **589 billion YER** from the market—equivalent to an estimated 3.13 percent of the total amount of local currency in circulation—since the start of the weekly public auctions on November 15, 2021. The CBY has also increased the amount of currency auctioned each week several times to keep up with demand for imports alongside rising global prices. These measures, along with the increase in general government revenue and reduced levels of conflict, have contributed to relatively greater stability of the Aden-based Rial in recent months overall, though volatility persists. Though the currency has continued to depreciate—apart from a notable but temporary appreciation alongside the start of the ceasefire in early April—the value of the YER in IRG areas has remained under 1,200 YER/USD, and the rate of depreciation has not been as rapid as that from September to November 2021, according to **data from FAO**. Meanwhile, in SBA-controlled areas, the exchange rate has remained generally stable at around 550-560 YER/USD since the start of the ceasefire.

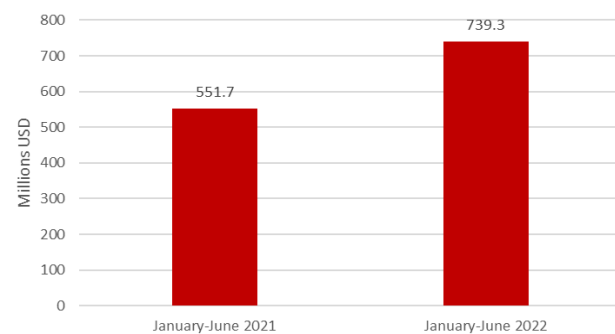
From the start of the truce in early April through the end of July, **33 fuel ships** carrying **907,100 MT of fuel** had entered via **Al Hudaydah port**. This is almost double the 535,000 MT of fuel that was imported throughout 2021. Despite this, according to key informants, diesel has remained completely unavailable at official stations in Amran, Ibb, and Al Mahwit, and availability has been unstable in Sana’a and Sana’a city. On the other hand, diesel has become available at official stations in Sa’ada for the first time since late February 2022. Despite generally improved availability, authorities **raised official fuel prices** in July due to rising global prices (Figure 4). As of August 21, authorities had reduced official prices again, though prices remain significantly above average.

Figure 2. Sources of IRG general government revenue for January to June period in 2021 and 2022



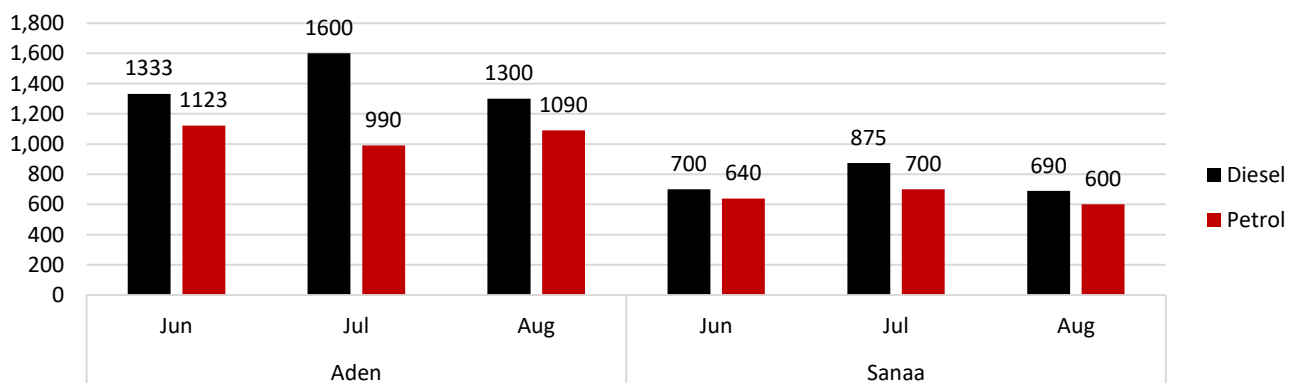
Source: Central Bank of Yemen - Aden

Figure 3. Oil export revenue (USD) for January to June period in 2021 and 2022



Source: Central Bank of Yemen - Aden

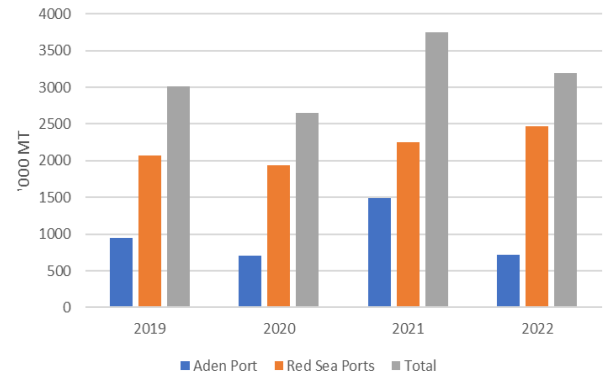
Figure 4. Official retail prices of diesel and petrol (YER/L) in Aden and Sana’a in June, July, and August 2022, as of August 21, 2022



Source: WFP mVAM & key informants

Yemen is very vulnerable to global food supply and price shocks due to its high dependence on imports for its staple food supply. According to data from WFP, the amount of **food imported** through the country’s three main three seaports (Al Hudaydah, As Salif, and Aden) from January to July 2022 was 15 percent lower than the same period of last year (Figure 5). The amount of food imported through the southern Aden seaport was 52 percent lower. However, the amount of food imported through the western Red Sea ports of Al Hudaydah and As Salif was 10 percent higher from January to July. This is likely at least in part due to improved imports through the Red Sea ports following the truce. In July 2022, around 60 percent of the total 306,000 MT of food that entered the country through the country’s three main three seaports entered through the western Red Sea ports of Al Hudaydah and As Salif. More recently, in mid-August, the IRG Minister of Trade and Industry [announced](#) that authorities had reached an agreement to eliminate the Saudi-

Figure 5. Total volume of food imported through Yemen’s three main seaports (Aden, Al Hudaydah, As Salif) in the January to July period



Source: WFP

led coalition’s importation inspection requirement—which requires all ships to be inspected at the port of Jeddah in Saudi Arabia prior to docking at ports in Yemen—from shipments to ports in IRG areas. Once implemented, this will significantly shorten the time required for importation and reduce importation costs. Discussions are also reportedly ongoing with the UN on how to reduce shipping insurance costs.

The resumption of wheat exports via Ukrainian seaports in late July is easing concerns for future global supply. This and ongoing northern hemisphere harvesting is reducing pressure on global markets and driving declining global prices. As such, **Yemeni importers** were able to procure additional shipments of wheat in August, including a planned 250,000 MT of wheat grain from Romania and France and an unspecified amount from India. The Yemeni ambassador to Turkey is also reportedly seeking to coordinate the resumption of wheat imports from Ukraine. Recent additional procurement has likely boosted staple wheat stocks in IRG areas, alleviating prior concerns for impending domestic supply shortages. According to the [IRG Minister of Trade and Industry](#), wheat stocks are now expected to be sufficient to meet domestic requirements for the coming four months.

Staple food commodities generally remain available nationwide. Given this trend, coupled with the resumption of exports through Ukrainian seaports and the relatively greater stability of the currency, **food price** increases in IRG areas have been more moderate than anticipated in recent months, which stands in contrast to previous expectations for significant food price increases in IRG-controlled areas where wheat shortages were anticipated due to declining stocks. Despite this relative improvement, food prices remain significantly above the five-year average and above levels recorded last year, with areas under IRG control worst affected. As of July 30, 2022, the cost of the minimum food basket (MFB) was 74 percent higher than the same time last year in IRG-controlled areas and 38 percent higher in SBA-controlled areas according to [WFP](#), driven by high global food prices and conflict in both areas and by depreciation of the currency in IRG-controlled areas.

Given persistent high food prices, many Yemenis are unable to afford sufficient food. More than half of the population earn primary **incomes** from irregular sources, including daily casual labor. According to data from WFP, a casual laborer would need to work for at least 10 full days in a month, on average at the national level, to afford the cost of the MFB at July wage rates and prices. However, this is considered very challenging given limited labor demand and high competition for available opportunities. In coastal areas, very high fish prices due to low supply during the windy season are further restricting access to nutritious foods.

Cumulative rainfall during Yemen’s March to May first rainy season was [significantly below average](#), leading to abnormal dryness and low soil moisture levels across most of the country and stressing **agricultural activities**. More recently, however, rainfall during Yemen’s second rainy season from July to October has been [significantly above average](#) as of late August. This and resultant improvement in soil moisture levels has likely supported recent cereal planting—in the highlands in July and in the second half of August in the eastern plateau—by reducing reliance on supplemental irrigation which requires fuel. However, persistently high prices of agricultural inputs likely deterred farmers from expanding cultivated land area, except in some northern highland areas where rainfed farming is pervasive and production costs are relatively lower. Additionally, flooding is expected to have caused localized crop damage, affecting sorghum and millet harvests in agricultural livelihood zones along the Red Sea and Gulf of Aden coasts (lasting through mid-August) and fruit and vegetable harvests at the

beginning of the peak harvest season in the central highlands (starting from mid-August). As a result, prices of domestically produced foods including vegetables have increased further. Flooding has also caused some farmers to miss the planting window for second season cereals in localized areas. After weeks of heavy rainfall, soils are reportedly saturated and river flows are elevated, especially in western parts of Yemen where 30-day rainfall surpluses have exceeded 300 mm.

Locust presence has diminished in Yemen since March, attributed in large part to moisture deficits persisting across most of the country through June. According to the [FAO](#), isolated adult locusts continue to be observed in southeastern Yemen, particularly in [Bidbadah and Sirwah districts in Marib](#). Though current high moisture levels during the second rainy season have likely increased the threat of locusts re-emerging—especially in Marib, Al Jawf, Shabwah, and Hadramaut governorates—control operations have been largely effective and there is no imminent threat of swarms forming or spreading into the interior of Yemen, though ongoing monitoring is required.

In August, **pasture conditions** are expected to have improved given normal seasonal patterns and above-average rainfall recorded during the current rainy season. This is likely contributing positively to livestock body conditions and productivity across most of Yemen. Despite this, high prices of livestock production inputs including animal feed and veterinary medicine continue to pressure pastoralist livelihoods. Prices of livestock have generally increased in recent months, in response to growing demand for livestock leading up to the holy month of Ramadan and the Eid al-Adha holidays in early July. However, due to weakened household purchasing power, seasonal demand for sheep has been lower this year compared to previous years, according to key informants.

Years of conflict and economic decline have driven reduced opportunities for income-earning and persistently rising food prices, resulting in growing dependence on humanitarian assistance as a key source of food and income for millions of vulnerable households. This has in turn increasing **funding requirements for humanitarian operations**. As of August 17, 2022, only [42.1 percent](#) of 2022 Yemen Humanitarian Response Plan (YHRP) was funded. Last year, when humanitarian funding was also a concern, [63 percent](#) of the YHRP was funded. Continuous funding shortfalls have led WFP to further cut rations and reduce the frequency of food assistance distributions for most beneficiary households in 2022. In July, WFP provided emergency food assistance to around [7.3 million people](#) as part of the fourth cycle of distributions in 2022 to date. Previously, assistance distributions occurred monthly. Additionally, in July, nearly all beneficiaries received rations equivalent to [less than 50 percent](#) of total energy needs, whereas most beneficiaries previously received rations equivalent to approximately 80 percent of their total energy needs.

According to key informants, **humanitarian assistance** beneficiaries in some areas where cash transfers are the primary assistance modality—including in Lahj, Shabwah, as well as in Al Dhale'e—have not been assisted since April or May 2022 due to liquidity shortages within WFP (whereas big traders have already been contracted to provide in-kind food). Precise information regarding assistance modality, ration sizes, and timing/frequency of deliveries at local levels remains limited. However, the WFP is not currently taking steps to resume monthly assistance distributions as per previous plans. Rather, available information suggests that the WFP is in discussions with local government bodies regarding how to proceed with continued provision of assistance at recently reduced levels—including how to make trade-offs between beneficiary numbers, ration sizes, and distribution frequencies—in order to target the most vulnerable households.

Despite lower levels of conflict and recent slight improvements in the economic situation, prices of key food commodities remain significantly above average and livelihood opportunities remain limited. Given this trend, alongside widespread reductions in humanitarian food assistance and the long-term erosion of household coping capacity, a growing number of poor households are likely unable to meet their minimum food requirements without engaging in severe coping strategies such as theft and other desperate crimes. Millions likely have no choice but to skip meals and are facing food consumption gaps indicative of Crisis (IPC Phase 3) or worse outcomes. **Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes are expected to be widespread at the governorate level**, though with many worst-affected households likely facing Emergency (IPC Phase 4) or worse outcomes. In Hajjah, Marib, Lahj, and Abyan where it is now the agricultural off-season, households' access to food and income from typical sources is seasonally limited. Given this and cuts to assistance for large shares of the local populations, area-level **Emergency (IPC Phase 4) outcomes** are currently expected in these four governorates.

UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET's most likely scenario for the [Yemen Food Security Outlook for June 2022 to January 2023](#) remain valid, except for the following revisions:

- Given recent additional wheat procurement following the resumption of exports through Ukrainian seaports, **national wheat grain supply and stocks** are expected to increase, with shortages of staple wheat in Yemen no longer anticipated.
- The recent **agreement to eliminate the Saudi-led coalition's importation inspection requirement**—which requires all ships to be inspected at the port of Jeddah in Saudi Arabia prior to docking at ports in Yemen—from shipments to ports in IRG areas will significantly reduce transportation time (from the current three to four months to around two months, as was previously the case) and associated importation costs. This will in turn place downward pressure on prices of imported food and non-food commodities once the impacts are transmitted to market prices, likely around November 2022. It will also likely improve the stability of the food supply given improved ability to anticipate importation time.
- Given revised expectations for imports and supply, **staple wheat flour prices** are now expected to remain generally stable near current levels, remaining significantly higher than average levels and higher than prices recorded last year. According to FEWS NET's integrated price projections, prices of imported staple wheat flour are expected to trade at levels between 850 and 1,150 YER/kg in the IRG reference market of Aden during the projection period. Meanwhile, prices of imported staple wheat flour in the SBA reference market of Sana'a city are expected to trade at levels between 500 and 700 YER/kg.
- WFP's plans to resume monthly assistance distributions have not manifest, and discussions with local authorities regarding future assistance plans—at reduced levels—are ongoing. A fifth cycle of **general food assistance** (with continued reductions in rations) is expected to start in September and continue through October. Given this development and limited donor funding amid high global food assistance needs, it is no longer expected that WFP will resume monthly assistance distributions in the projection period. Rather, beneficiaries are expected to continue being reached on a cyclical basis with reduced rations. However, uncertainty exists in WFP's plans.

PROJECTED OUTLOOK THROUGH JANUARY 2023

In lowland areas, access to food and income from agricultural sources—including income from labor opportunities along the production and marketing chains and food and income from crop production and sales—is expected to remain at seasonally low levels through the beginning of the main harvest of cereals and vegetables around November. In highland areas, access to food and income from agricultural sources is generally expected to increase throughout most of the projection period given the main harvest of cereals beginning around October and the main fruit and vegetable production season that lasts through December. In January, however, there will be a decline in access to food and income during the agricultural off-season.

Lowland areas are primarily expected to benefit from the recent floods, as crop production and profits will likely increase due to reduced irrigation costs. In localized central highland areas (where there is only one planting season for cereals), however, some farmers missed the planting window in March due to the abnormally dry conditions in the first rainy season. Meanwhile, some farmers in northern highland areas (where there are two planting seasons for cereals) were unable to plant on time due to the heavy rains in the second rainy season. This is likely to lead to below-average harvests in localized areas, increasing households' dependence on markets for food.

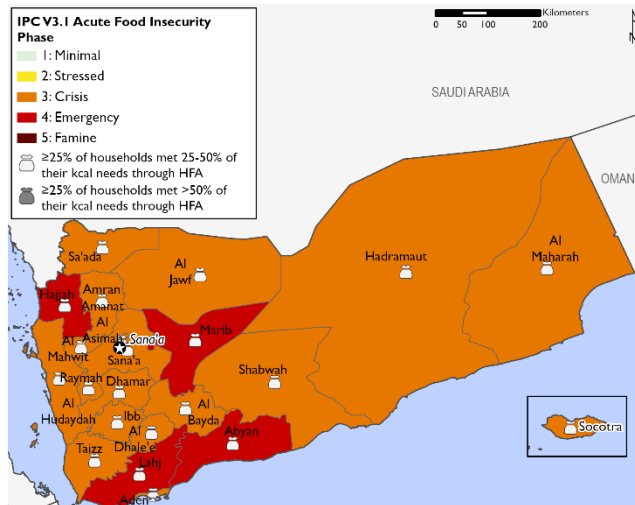
Millions of households in both urban and rural areas will continue to face significant reductions in humanitarian food assistance throughout the projection period. Given limited income-earning opportunities and significantly above-average food prices, many additional households are expected to face consumption gaps or widening consumption gaps. Flood-affected households and displaced households are likely to be among the worst affected.

Primarily driven by expectations for reduced humanitarian assistance, **Emergency (IPC Phase 4) outcomes** are expected in Hajjah, Marib, Lahj, and Abyan during the agricultural off-season from August to October when access to food and income is also seasonally limited in lowland areas. By November, most of these areas will likely see improvement back to **Crisis! (IPC Phase 3!)** alongside increased availability of food and income with the start of the harvest of cereals and vegetables beginning around October/November. However, **Emergency (IPC Phase 4) outcomes** will likely persist in Marib through January, given the significant number of displaced households who are highly dependent on humanitarian assistance.

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

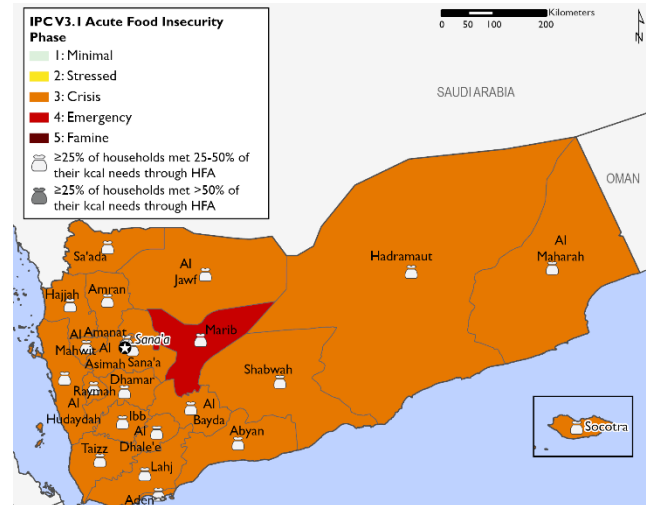
Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☺ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian 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.

Projected food security outcomes, August 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 Update, August 2022. Early season dryness and recent floods exacerbate food insecurity amid reduced assistance, August 2022.

ABOUT THIS UPDATE

This report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET’s Food Security Outlook, which is published three times per year. Learn more about our work [here](#).