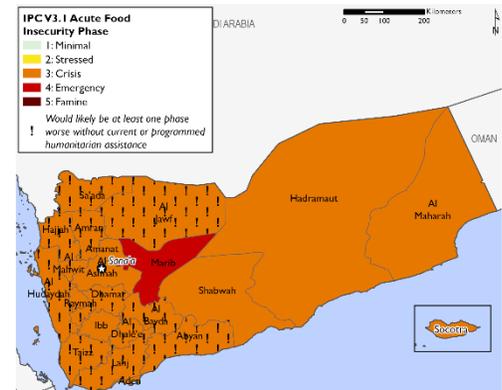


Expired truce and high food prices undermine recent improvements, especially in Marib and Hajjah

KEY MESSAGES

- Reduced levels of conflict during the recently expired truce, which began in April 2022 and ended in October, have supported some improvements in business activity, trade, and humanitarian access. However, given that the renewal of the truce is conditioned upon demands that are unlikely to be realized during the projection period, conflict is expected to re-escalate gradually. Additionally, food and essential non-food prices remain significantly above average. Rising levels of conflict will likely once again reduce household income-earning opportunities and impede fuel imports through the Red Sea ports, leading to declining fuel availability and upward pressure on prices in areas controlled by the Sana’a-based authorities (SBA).
- In highland areas, the main season harvest is ongoing and will conclude in December/January. In lowland areas, the vegetable cultivation season is expected from November/December to January. However, associated seasonal improvements in household access to food and income will be temporary, with household food stocks expected to last no more than two months. Given that the availability of other sources of food and income remain very low after years of protracted conflict, many households will have low to minimal income and will be unable to purchase sufficient food from the market after their food stocks are depleted.
- Around 13 million beneficiaries of humanitarian assistance have experienced reductions in the frequency and size of deliveries throughout 2022. Due to funding shortfalls, WFP has reduced the frequency of distributions from monthly to around once every six weeks and reduced the ration size per distribution from around 80 percent of one month’s minimum kilocalorie needs (last delivered in 2021) to around 65 percent in the ongoing distribution cycle. While a 65 percent ration represents a relative improvement from earlier this year, households still have food consumption gaps.
- Given limited income, reduced humanitarian assistance, and significantly above-average food prices, Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes are expected to remain widespread. In Marib, Emergency (IPC Phase 4) outcomes will likely persist given the large population of displaced and flood-affected people. In Hajjah, which is anticipated to be among the frontlines of an escalation in conflict, Emergency (IPC Phase 4) outcomes are expected from February to May.

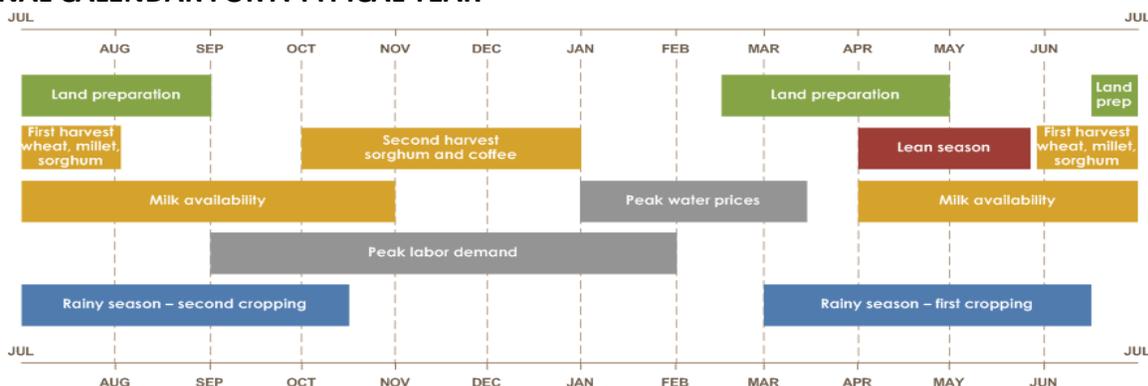
Current food security outcomes, October 2022



Source: FEWS NET

FEWS NET’s classifications are IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

The UN-mediated **truce** that began in early April 2022 expired on October 2, 2022. Though there have been ongoing **negotiations** focused on renewing the truce and working toward a political settlement of the conflict, the updated truce proposal submitted by the United Nations (UN) special envoy on October 2, 2022, was rejected by the Sana'a-based authorities (SBA) alongside increased demands that were later refused by the internationally-recognized government (IRG). Key among these demands were the payment of civil servant salaries in SBA areas (including for the SBA military after 2014) from IRG revenue and the re-opening of roads to Taizz city (which both parties accuse each other of hindering).

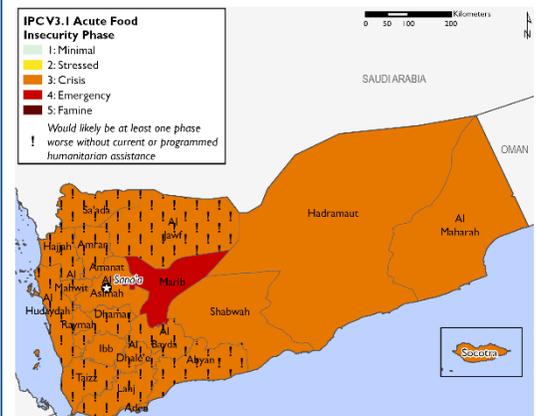
Despite the official expiration of the truce, **conflict** did not re-escalate in October. Rather, both parties continued to operate in a period of unofficial truce as negotiations continued. According to data from the **Armed Conflict Location and Event Data Project (ACLED)**, the number of incidents of ground conflict in October remained similar to the number in September. Though there was an increase in shelling and drone strikes in the last two weeks of September prior to the end of the truce, the number of incidents declined significantly in October. Airstrikes by the Saudi-led coalition (SLC) and cross-border attacks by SBA forces have also remained on hold, despite daily threats from SBA officials. However, in an apparent strategic shift, SBA forces began targeting oil production and export infrastructure in IRG areas with drone strikes in mid-October. This included an attack on **An Nushaymah port** in Shabwah and **Ad Dhabba port** in Hadramout. Though no damage or fatalities were reported, oil production and exports in Hadramaut were disrupted and remain on hold as of the end of October due to the high risk to ships when docking.

During the truce period from April 2 to October 2, 2022, conflict-driven **fatality levels** have been the lowest recorded in several years (Figure 1), according to data from ACLED. This was largely due to the sharp reduction in airstrikes by the Saudi coalition. Civilian casualties (injuries and fatalities) also decreased during the truce period, according to data from the Civilian Impact Monitoring Project (CIMP). However, incidents involving landmines and unexploded ordnances have increased, largely due to improved access to previously inaccessible conflict-affected areas that have not yet been cleared of explosives. In the third quarter of 2022, CIMP reports that landmines and unexploded ordnances caused 164 civilian casualties across Yemen, the highest total on record related to explosive devices.

Ongoing conflict also continues to cause **population displacement**, though at significantly lower levels compared to the pre-truce period. According to data from the **International Organization for Migration (IOM)**, around 4,276 households were displaced in monitored areas during the truce period from April 2 to October 2, 2022. This is approximately half of the number of people displaced during the same period of last year. Of those displaced during the truce period, the largest number were displaced to locations in Marib (1,350 households), Shabwah (634 households), Al Hudaydah (526 households), Al Dhale'e (447 households), and Taizz (442 households), with most having been displaced more than once. More recently, following the expiration of the truce from October 3rd to 30th, a total 238 households were displaced, mainly in Marib (134 households). However, this total is 36 percent lower than the monthly average during the truce period.

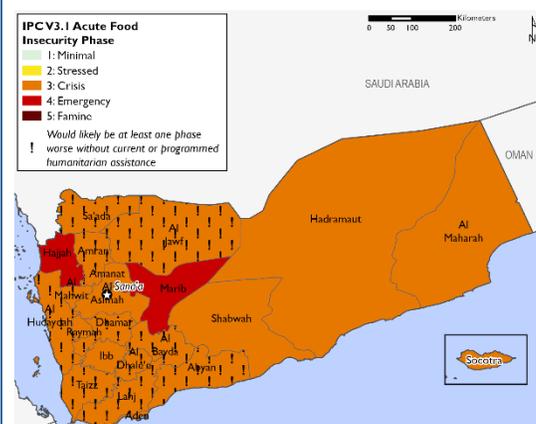
Reduced levels of conflict have given the Yemeni **economy** some breathing room, with some improvements in the business environment and trade. However, the economy remains fragile and has yet to recover from years of protracted conflict and multiple additional shocks. Despite a significant increase in oil revenue in the first half of 2022, unplanned public expenditures

Projected food security outcomes, October 2022 to January 2023



Source: FEWS NET

Projected food security outcomes, February to May 2023



Source: FEWS NET

FEWS NET's classifications are IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

resulted in a budget deficit and rising domestic debt ratio, challenging the partial recovery of the economy.

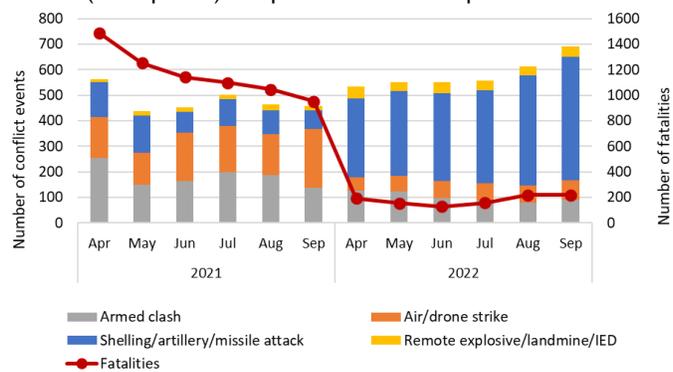
In addition to positive economic impacts of reduced conflict and increased oil revenues, weekly foreign currency auctions held by the Central Bank of Yemen (CBY) in Aden since November 10, 2021, have contributed to relatively greater stability of the **local currency (YER) in IRG-controlled areas** (Figure 2). In the latest of many additional effort to control the exchange market, the CBY-Aden published new regulations for payment systems and services on September 14, including new licensing requirements for businesses who wish to offer “non-traditional” payment methods (including electronic and card payments) which exchange shops are precluded from obtaining. In October 2022, the dollar value of the currency in IRG-controlled areas was similar to the previous month (2 percent lower), on average, and 8 percent higher than the same time last year. However, despite positive developments, the exchange rate still displays significant volatility in response to political and economic events and has depreciated (lost value) by 5 percent overall since January 2022, following a period of notable appreciation at the end of 2021. Meanwhile, in SBA-controlled areas, the value of the local currency remains generally stable at levels 6 percent higher than last year.

Since the start of the truce on April 2, **fuel** has become increasingly available across SBA-controlled areas due to the relatively unrestricted entry of oil ships into Al Hudaydah and As Salif seaports. Previously, ships were subject to detention by the SLC and systematic delays in customs clearance. This has ended the fuel shortages that were negatively impacting livelihoods and reducing purchasing power for millions in SBA-controlled areas since early 2020. According to data from the [United Nations Verification and Inspection Mechanism for Yemen \(UNVIM\)](#), nearly 1.6 million tons of fuel was imported through SBA-controlled seaports (Al Hudaydah and As Salif), representing a 330 percent increase compared to the same time period of 2021 when only 371,000 tons of fuel were imported. However, since the expiration of the truce, the SLC has reportedly delayed granting entry clearance for **four fuel vessels**, prompting concerns for future shortages. Meanwhile, in IRG-controlled areas, fuel remains generally available. However, sporadic fuel shortages have been reported in some IRG-controlled areas, likely due to negotiations with fuel traders on selling prices given changes in the exchange rate.

In SBA areas, given the improved fuel supply and declining import costs due to the relatively unrestricted entry of oil ships into the Red Sea ports, the Sana'a-based Yemen Petroleum Company (YPC) reduced official **fuel prices on October 16, 2022**, for the third time in two months. Prices of petrol in SBA areas were lowered by 8.6 percent, from 11,500 YER/20L to 10,500 YER/20L while prices of diesel were lowered by 7.4 percent, from 13,500 YER/20L to 12,500 YER/20L. Declining global oil prices have also supported declining domestic fuel prices across Yemen in recent months. In IRG-controlled areas – where fuel prices are **determined** primarily by global fuel prices and currency exchange rates – the Aden-based Yemen Petroleum Company (YPC) has reduced fuel prices three times in the past year. Most recently, on October 5, official petrol prices were reduced by **10 percent** due to declining global fuel prices.

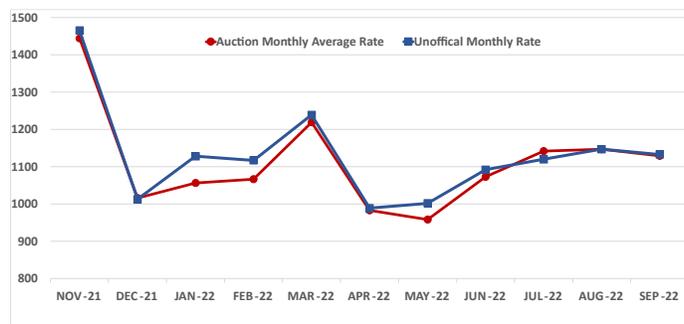
Yemen is highly dependent on **imports** for its staple food supply, and available data shows that imported volumes of basic food commodities are significantly lower this year compared to last year. From January 1 to September 30, 2022, traders imported nearly 3,700,000 MT of basic food commodities through all the country’s main sea and land ports. Of that amount, 70 percent was imported through the western Red Sea ports of Al Hudaydah and As Salif (in SBA-controlled territory), while 30 percent was imported through Aden and other sea and land ports in IRG-controlled territory. The total amount imported nationally was 14 percent lower than in the same time period of 2021, due largely to a 48 percent decline in wheat (grain and

Figure 1. Conflict events and fatalities, monthly, April to September of 2022 (truce period) compared to same time period of 2021



Source: FEWS NET using data from ACLED

Figure 2. Monthly average CBY-Aden currency auction rate (YER/USD) and parallel market exchange rate (YER/USD) in Aden governorate, November 2021 to September 2022



Source: FEWS NET using data from CBY-Aden and FAO

flour) imports through IRG-controlled ports following the start of the war in Ukraine (though cooking oil imports also declined nationwide).

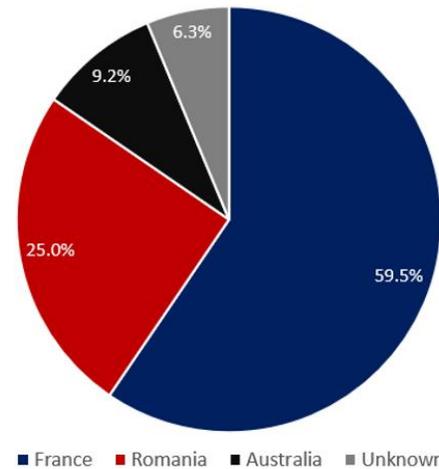
Similar trends are observed in the third quarter of 2022 (July to September), when the amount of food imported nationwide was 21 percent lower than the same period of 2021 and the amount imported through IRG-controlled ports was a full 53 percent lower than in same period of 2021. However, **previous concerns about potential shortages** of staple wheat flour given declining import levels and stocks earlier in the year have been alleviated by additional procurement. According to key informants, Hayel Saeed Anam Group (HSAG), Yemen’s largest food conglomerate, imported a total 436,140 MT of wheat grain – mostly from France, Romania, and Australia (Figure 3) – from July 29 to October 10, of which 379,340 MT berthed in Al Hudaydah and Aden seaports. More recently, HSAG secured a shipment of 56,800 MT of Russian wheat that arrived at Aden seaport on October 18, 2022. Other shipments with around 56,800 MT of wheat grain are on route, according to key informants.

Despite lower import levels through IRG-controlled seaports, **basic food commodities generally remain widely available**. However, even with declining fuel prices nationwide and the relative stability of the local currency in IRG areas, **food prices remain higher than the same time last year and significantly above average**. As of September 2022, the average cost of the minimum survival food basket (MFB) in Aden markets was 127,788 YER, 53 percent higher than at the same time in 2021, according to [data from FAO](#). Prices of staple wheat flour, cooking oil, and basmati rice in September 2022 were 56 percent, 48 percent, and 35 percent higher, respectively, than in September 2021. This is mainly because traders are reluctant to decrease prices in order to preserve profit margins. Meanwhile, in Sana’a city, the cost of the MFB decreased by 5 percent from August to September 2022 but remained 13 percent higher than in the previous year.

Livelihoods continue to be disrupted by years of conflict and economic decline, with income-earning opportunities remaining below average. The recent improvement in fuel availability in SBA areas has led to the revival of small businesses, which offer some income-earning opportunities. However, they have remained very limited due to the overall weak business environment. Despite contributing only modestly to the domestic food supply, the **agricultural** sector engages a large proportion of the workforce. However, on top of the long-term negative impacts of conflict – including through restricted access to land, high cost of production inputs and fuel, and bureaucratic obstacles to marketing – both rainy seasons in 2022 were **destructive** to crops in many areas, given dry conditions in the first season and heavy rainfall and flooding in the second season. Additionally, despite reduced conflict, livelihoods in frontline areas (such as in Hajjah, Al Jawf, and Marib) have not recovered given restricted access to markets, and farmers in many other previously conflict-affected areas remain unable to access their land due to landmines

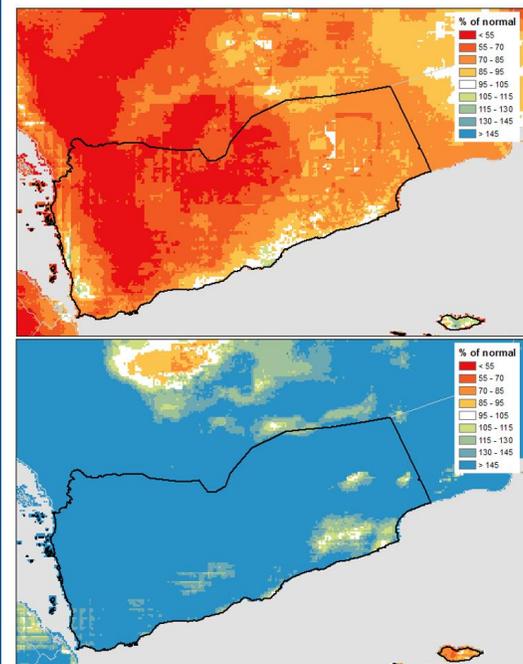
Cumulative rainfall during Yemen’s first rainy season from March to May 2022 was significantly below average (Figure 4). According to FAO information reported by [UNOCHA](#), the January to June 2022 period was the third driest on record in 40 years. Due to the poor rainfall, planting was delayed in many highland areas. Some farmers in the southern uplands – with only one cereal (sorghum, maize, wheat, and barley) planting season from April to July – either missed the planting window or experienced their seeds withering.

Figure 3. Sources of wheat imported by Hayel Saeed Anam Group (HSAG) from July 29 to October 10, 2022



Source: FEWS NET using data from key informants

Figure 4. Cumulative precipitation as a percent of the 1981-2010 average from March to May 2022 (top) and July to October 2022 (bottom) according to CHIRPS remote sensing data



Source: FEWS NET/USGS

Following these severe dry conditions, Yemen’s **second rainy season** (July to October 2022) was characterized by significantly above-average rainfall. Although this generally benefited agricultural production (especially in rainfed farming areas and lowland areas where farmers were able to utilize runoff for irrigation), the extent of the **destruction caused by flooding** was severe. In addition to damage to homes and infrastructure in affected locations across the country, heavy rains and flooding damaged crops and killed livestock. For example, heavy rainfall in August damaged hundreds of grapevines in Sana’a and killed hundreds of livestock in Al Jawf, according to [FAO](#). In other areas affected by floods from July to August, widespread damage to cash crops, coffee, vegetables, and fruit trees was reported. This damage has limited incomes for many households who rely on the sale of crops as a main source of household income.

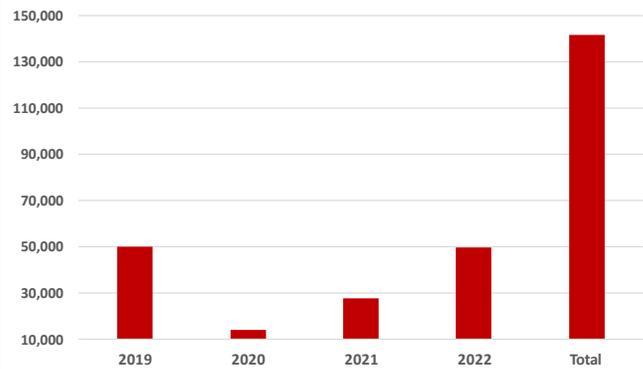
Meanwhile, in the northern and central highlands, where there are two cereal-planting seasons (March to May and July to August), many farmers were unable to plant on time due to the heavy rainfall. Overall, OCHA estimates that, as of September 30, nearly **74,000 households** across Yemen had been affected by heavy rain and flooding, with the greatest numbers affected in Marib (28,000 households), Hajjah (15,800), Al Hudaydah (6,100), Amran (3,400), Al Jawf (3,300), and Dhamar (3,300). Many of the flood-affected families in Marib had already been residing in **displacement sites**, likely with limited assets. Although flooding subsided in September, many continue to face post-flood impacts, particularly in western governorates.

Currently in October, farmers in the **highlands** are starting to harvest cereals (wheat, maize, barley), fruits (citrus), pulses and prepare the land for winter wheat and barley. **Cereal production** in the highlands is expected to be below pre-conflict-levels and slightly less than last year given the late planting alongside below-average first season rainfall (as farmers may need to harvest cereals prematurely to avoid losing them due to cooling temperatures) and the impacts of floods in the second season, including crop damage, increased spread of **plant diseases**, and access constraints that reduced agricultural operations. Despite of that, cereal and citrus harvests are expected to provide income-earning opportunities. Meanwhile, in **lowland areas** including the Tihama Plains and the Red Sea coast, farmers have started preparing the land for vegetables and planting palms, bananas, and mango seedlings. These crops are likely providing households with seasonal income-earning opportunities from agricultural labor and other activities throughout the production and marketing chains.

Above-average second-season rainfall also led to notable improvements in **pasture conditions**, with peak conditions captured by **satellite data** around mid-October in many western areas. Improved availability of pasture, as well as fodder and water resources, has likely led to some improvement in **livestock body conditions**, which is in turn benefiting many households in agropastoral areas through an increase in income from the sale of livestock and livestock products. Nonetheless, lack of access to veterinary medicine continues to contribute to the spread of animal diseases and pests, a contributing factor to poor body conditions and one of the main causes of livestock fatalities across Yemen, according to key informants. Additionally, high prices of inputs – including fodder – continue to constrain profit margins. On average at the national level, prices of commercial dry fodder in September 2022 increased by a full 20 percent compared to August, reaching levels 61 percent higher than September 2021, according to data from [FAO](#). However, livestock prices have generally been increasing throughout 2022 alongside rising input costs. After increasing from April/May to July alongside high seasonal demand associated with the *Ramadan* (April), *Eid al Fitr* (May), and *Eid al-Adha* (July) holidays, prices of sheep and goats have remained fairly stable through October at the highest levels recorded this year, though slightly less than the record-high prices recorded in November /December 2021, according to [FAO data](#).

Given the limited availability of income-earning opportunities overall and the rising trend of food and essential non-food commodity prices, **remittances** are an important source of income for many families and an important source of foreign currency for the country. However, after notable disruption during COVID-19 lockdowns, remittance inflows have likely not returned to pre-COVID levels, primarily due to increasing challenges around living and working in Saudi Arabia – which is the most important source of remittances for Yemenis – including the rising cost of living, increasingly strict work permit requirements, higher residency fees, and additional labor nationalization policies. Since 2019, 141,620 Yemeni migrant workers returned from Saudi Arabia according to IOM data, including **49,815** who returned from January 1 to September 30, 2022 (Figure 5). The majority have returned without travel documents.

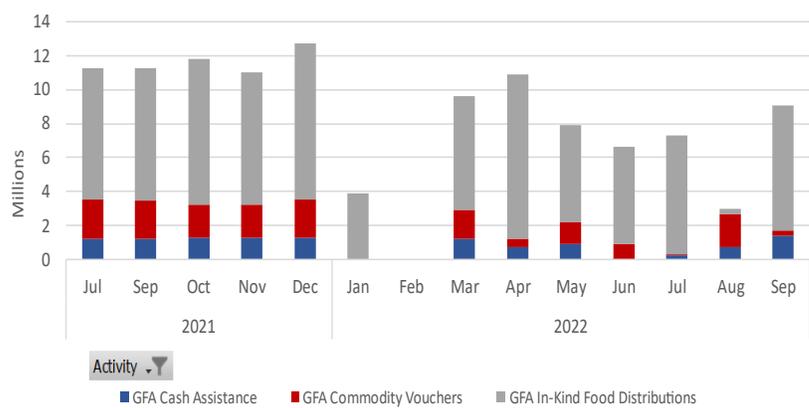
Figure 5. Number of Yemeni migrant workers returning from Saudi Arabia, yearly, 2019 to 2022 to date as of September 30



Source: FEWS NET using IOM data

For millions of households in Yemen, humanitarian assistance has become a primary source of food and income and is commonly the most important source of food for many poor and displaced households. However, funding shortages continue to threaten assistance programming. As of October 26, 2022, the Food Security and Agriculture Cluster (FSAC) had received only 49 percent of a total of 2.1 billion USD requested for programming and operations throughout all of 2022. Given this funding shortfall, WFP has scaled down its provision of emergency humanitarian food assistance in 2022 (Figure 6) by reducing both the frequency of distributions and the ration size per distribution. In 2022, WFP

Figure 6. Number of beneficiaries assisted by WFP with emergency general food assistance (GFA) of various modalities, monthly, July 2021 to September 2022



Source: FEWS NET using WFP data

transitioned from monthly distributions to cyclical distributions that occur approximately once every six weeks. Additionally, many beneficiaries have experienced reduced rations in 2022, according to data from FSAC. In previous years, beneficiaries generally received rations equivalent to around 80 percent of a household’s minimum monthly kilocalorie (kcal) requirements, based on calculations using the MFB. By WFP’s fourth distribution cycle in 2022 (completed in September), however, most beneficiaries received rations covering 50 percent or less of their minimum monthly kcal requirements. While a moderate increase is planned for the fifth distribution cycle, in which WFP plans to target 13.2 million people with a ration covering 65 percent (1,100 kcal) of the minimum food basket, this still leaves a 35 percent deficit that many households struggle to fill through other sources. The fifth cycle started in late September and is ongoing as of the end of October.

Current Food Security Outcomes

The scale and severity of acute food insecurity remains high overall in October, despite some limited seasonal improvements due to the ongoing cereal harvest in the highlands. Though business activity has improved slightly due to reductions in conflict, opportunities for income-earning remain severely limited and purchasing power continues to decline due to rising prices of food and essential non-food commodities. Overall, millions of households likely continue to face inadequate food consumption. Households worst-affected by floods in the second rainy season – including many displaced households – are likely still facing the impacts of reduced income-earning and/or above-average expenditures to recover from damage. Additionally, across the country, millions of households in both urban and rural areas have faced a notable reduction in total food and income from humanitarian assistance in 2022. Given limited ability to expand income-earning to compensate and already highly eroded coping capacity, many poor households are likely increasingly resorting to reducing the quantity and frequency of meals. Overall, millions are likely facing food consumption gaps. **Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes are expected to be widespread at the area level**, with worst-affected households in Emergency (IPC Phase 4) or worse. In Marib, where flood impacts were severe and there a high share of the population is dependent on reduced levels of humanitarian assistance, Emergency (IPC Phase 4) outcomes are expected at the area level.

High levels of acute malnutrition persist in Yemen, driven by both food and non-food factors. Poor sanitation and health infrastructure, limited access to basic health services, and the spread of water-borne, diarrheal, and other diseases continue to compound the impacts of poor diets on malnutrition outcomes. According to the most recent available survey data collected in 2021 and reported by the IPC in 2022, the prevalence of global acute malnutrition (GAM) as measured by mid-upper arm circumference (MUAC) across surveyed districts of Sana’a city was in the “Serious to Critical” ranges according to IPC thresholds. Meanwhile, in Aden, the GAM by MUAC prevalence was on the border of “Serious to Critical” and “Critical to Extremely Critical,” according to the IPC thresholds. Even more concerning levels of GAM by MUAC were recorded in Al Hudaydah, Al Mahwit, Hajjah, Lahj, Raymah, and Taizz, with prevalence considered in the “Critical to Extremely Critical” range. According to the nutrition cluster, admissions of severe acute malnutrition (SAM) among children under five totaled nearly 215,000 from January to August 2022, similar to the nearly 218,000 cases recorded in the same period of the previous year.

Assumptions

The most likely scenario from October 2022 to May 2023 is based on the following national-level assumptions:

- Though negotiations are expected to continue, a **renewal of the truce** is not expected during the projection period, given that this is conditioned on demands (including the payment of civil servant salaries in SBA areas and the reopening of roads in Taizz) that are unlikely to be met during the projection period. However, notable uncertainty exists, and a renewal of the truce remains possible in case of increased pressure by international actors, particularly on IRG authorities to accept SBA demands.
- Given the expiration of the truce, **ground fighting** is expected to increase gradually in the main frontline areas (including Taizz, Al Dhale'e, Hajjah, Lahj, and Marib) in the first half of the projection period. With parties believing that the negotiations will fail, re-escalation of ground fighting to pre-truce levels is likely, with a resumption of SLC airstrikes and SBA cross-border missile attacks expected during the second half of the projection period. However, airstrikes are unlikely to reach January to March 2022 levels, ostensibly due to a lack of appetite on the part of the Saudi government. Additionally, given ongoing threats and recent patterns, SBA drone attacks targeting crude oil infrastructure will likely increase during the projection period.
- Although a 3 billion USD **Gulf financial aid package** was announced concurrently with the formation of the Presidential Leadership Council (PLC), it is conditioned on reforms that will take time to implement. Given this and the lack of progress to date, the CBY-Aden is not expected to receive the funds during the projection period.
- In IRG areas, **fuel prices** are expected to remain generally stable, though significant uncertainty exists given that prices will continue to be influenced by unpredictable global trends and by the local exchange rate. Meanwhile, the decision to **lift the requirement** that shipments into Aden seaport be inspected in Saudi Arabia could continue to exert some downward pressure on fuel prices in IRG areas.
- In SBA-controlled areas, **reduced fuel import levels** are expected in the coming months given the expiration of the truce. As such, the **availability of fuel** at relatively lower official prices is expected to decline in SBA areas, forcing people and businesses to increasingly purchase fuel at higher unofficial prices. Though official and unofficial fuel prices are generally expected to increase due to reduced availability, fuel prices in SBA areas will also continue to be influenced by unpredictable global trends.
- Based on known procurement and general stabilization of supply chains since the Russian invasion of Ukraine, **wheat imports** in the fourth quarter of 2022 are expected to increase relative to the first three quarters of 2022, though total wheat imports in 2022 are forecast to remain **below the five-year average**. Domestic supply shortages are not expected during the projection period.
- Staple wheat flour prices are expected to remain significantly above average across the country, despite varying nuances in price dynamics between SBA areas and IRG areas. Supported by strong price controls by SBA authorities, **staple wheat flour prices** in the key SBA reference market of Sana'a city are expected to remain stable through late 2022/early 2023 before declining in response to improved import volumes. In the IRG reference market of Aden, wheat flour prices are expected to increase slightly throughout most of the projection period, based on expectations for a slight depreciation of the currency and traders' reluctance to decrease prices, the latter of which is due to continued uncertainty surrounding global supply and prices. However, prices will likely eventually stabilize in mid-2023 as import levels improve.
- Prices of **fertilizer** are expected to remain high alongside supply shortages due to the country's heavy reliance on imports from Ukraine and Russia and difficulties in securing fertilizer from alternative sources given export restrictions, including **export bans** on fertilizers from Russia, Ukraine, China, and Kyrgyzstan.
- The risk of **cyclone strikes** and associated flooding for Socotra and the southern Aden Gulf coast during the peak period from November to December 2022 is expected to be below average due to forecasted **below-average sea surface temperatures** in the Arabian Sea, while the normal seasonal risk of cyclone strikes is anticipated for January to May 2023.
- Based on past seasons with Indo-Pacific Sea surface temperatures similar to those forecast for 2023, cumulative rainfall in Yemen's **March to May 2023 first rainy season** is most likely to be below average, although notable uncertainty exists given the long lead time of the forecast.

- Overall, **above-average temperatures** are most likely across most of the country throughout the projection period, although localized variability is expected.
- Overall, **crop production in the main harvest** from November 2022 to January 2023 is expected to be slightly below last year and significantly below pre-crisis (February 2015) levels due to the impacts of flooding during the second rainy season and insufficient pest control on top of the impacts of protracted conflict and increasing input prices. While nominal income from crop sales is likely to be higher than last year due to persistent inflation, real income is expected to be less than last year and significantly 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. Real income from qat sales is expected to be near average.
- In highland areas, **agricultural and non-agricultural labor demand** is expected to seasonally increase from October to December with the main harvest season and then decrease from January/February to March before increasing again in April and May with the start of cereal land preparation and the planting season. In lowland areas (coastal and inland), labor demand is expected to seasonally increase around November following the start of the agricultural season in late October and remain at seasonally high levels throughout the projection period. Despite normal seasonal trends, the total availability of labor opportunities is expected to remain below normal throughout the projection period, due to the impacts of protracted conflict and the forecast of below-average rainfall in the first rainy season. Additionally, although wages are expected to increase due to inflation, the real value of income from labor is expected to remain stable or decrease and remain below average.
- **Pasture conditions** are expected to deteriorate during the dry period, as is typical, reaching near normal levels by March 2023. Following the start of the first rainy season in March, pasture conditions are expected to seasonally improve again in April and May, though improvements will likely be less than normal due to below-average rainfall forecast for the first rainy season.
- **Milk from livestock** is generally expected to remain seasonally available throughout the October to December period and then become available again around March. Overall, nominal **income from livestock and livestock product sales** is expected to be above average due to inflation, while real income is expected to be similar to last year, though below last year for households who lost livestock in recent floods. Income from livestock sales will increase seasonally in March/April with the *Ramadan* and *Eid* holidays.
- **Food and income from fishing** will be at seasonally high levels throughout the projection period but will likely remain below pre-crisis levels due to significantly above-average fuel prices and conflict-related access constraints.
- Significant shifts in **oil and natural gas production** are not expected within the projection period. Oil production and export levels are likely to be similar to those of previous recent years. Given high global prices, foreign exchange earnings from oil exports are expected to be slightly higher than last year's levels and above the five-year average, but significantly below pre-conflict levels.
- **Income from foreign remittances** is expected to remain similar to current levels and below pre-COVID levels due to the continuous return of Yemeni workers from Saudi Arabia and the impacts of global inflation, including in the US and UK.
- Given the failure to reach an agreement on **civil servant salary payments in SBA areas** during truce negotiations, employees in SBA-controlled areas will likely remain unpaid. Meanwhile, most employees in IRG-controlled areas are expected to receive their salaries on a regular basis, though employees in the military sector will likely continue to receive payments on an intermittent basis. Real income from civil servant salary payments will remain significantly below pre-conflict levels given that salaries have not been adjusted for inflation.
- Given ongoing funding shortages and uncertainty regarding funding levels in 2023, **emergency humanitarian food assistance** is likely to continue near current scaled-down levels. In many communities, beneficiaries are expected to share assistance with non-beneficiaries. Given expectations for re-escalation of conflict, humanitarian access constraints are likely to re-emerge in many areas.

Most Likely Food Security Outcomes

In the first half of the projection period from **October 2022 to January 2023**, seasonal availability of food and income is expected to increase due to the main cereal and fruit (citrus) harvests in the highlands (October to November) and the main cereal harvest and vegetable cultivation season in the lowlands (December 2022 to January 2023). Additionally, improved fuel availability, lower fuel prices, and relatively low levels of conflict (despite some anticipated re-escalation) are likely to continue supporting improved business activity and associated income-earning during this time. Despite these positive factors, significantly above-average prices of food and essential non-food commodities are expected to continue to strain poor households' limited available resources. An increase in respiratory illnesses and fever during winter is likely to further increase essential expenditure requirements. Given this, reduced levels of humanitarian assistance, and already eroded coping capacity, millions of poor households are likely to continue to face food consumption gaps during this period. At the governorate level, **Crisis (IPC Phase 3) and Crisis! (IPC Phase 3!) outcomes** are expected to persist across most of the country. However, many worst-affected households are likely to face wide consumption gaps or engage in severe coping indicative of Emergency (IPC Phase 4) or worse outcomes, including those with very limited access to income sources or those who were worst-affected by recent floods and also have insufficient access to humanitarian assistance. In Marib, **Emergency (IPC Phase 4) outcomes** are expected at the area level given the large population of displaced households who are highly dependent on humanitarian assistance, many of whom also lost shelter or other assets due to recent flooding.

The **February to May 2023** period is largely the agricultural off-season in highland areas, when access to seasonal sources of food and income will decline. Given expectations for below-average cereal production in the highlands, most households' own-produced stocks will likely be exhausted after less than two months following the harvest. Although agricultural activities will resume in April and May, expectations for below-average rainfall during the first rainy season (March to May) will likely limit labor opportunities. Meanwhile, in the lowlands, the cereal, vegetable, and fruit harvests (particularly the mango harvest) are likely to provide some sources of income from crop sales and daily wage labor throughout the projection period. However, in the absence of the renewal of the truce, a re-escalation of conflict is expected to exert constraints on business and income-earning activity. Additionally, millions of beneficiaries will continue to receive reduced levels of humanitarian assistance. Given conflict-related impacts on income, reduced food assistance, and high food prices, an increase in the number of households facing food consumption gaps consistent with **Crisis (IPC Phase 3) or worse outcomes** is expected. Additionally, **Emergency (IPC Phase 4) outcomes are expected to persist in Marib and emerge in Hajjah** due to the large proportion of displaced households and the anticipated re-escalation of conflict along front lines in both governorates.

Events that Might Change the Outlook

Table 1. Possible events over the next eight months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Renewal of truce	Given that the renewal of the truce is conditioned upon payment of civil servant salary payments in SBA areas, this would significantly boost income-earning for more than one million people. Reduced levels of conflict would also continue to support improvements in business activity and income-earning nationwide. Many poor households would likely experience improved food consumption. The number of households facing Crisis (IPC Phase 3) or worse outcomes would likely decline. Over time, many areas would likely see improvement to Stressed! (IPC Phase 2!).
IRG-controlled areas	Sharp decline in oil revenue given SBA targeting of oil infrastructure	The CBY-Aden would likely struggle to provide the hard currency required to support the public currency auction. This would likely increase traders' reliance on the parallel currency market. The local currency would be expected to depreciate rapidly, driving increasing prices of food and non-food commodities. Declining food import levels would be possible. Given rising prices, millions of households in IRG-controlled areas would likely face declining food access. An increased number of households would likely face Crisis (IPC Phase 3) or worse outcomes.

AREAS OF CONCERN

Hajjah Governorate

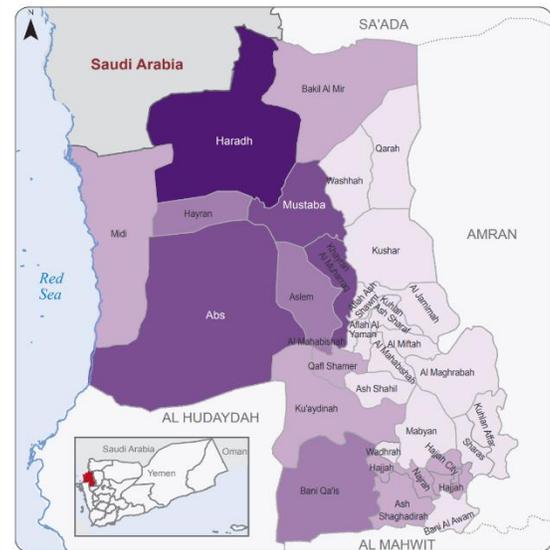
Hajjah is located in the northwest corner of Yemen (Figure 7). Its capital is Hajjah city, and other major cities are Haradh, Abs, and Al Mahabishah. Hajjah has diverse terrain, with low-lying plains in the west, extending to the Red Sea, and mountainous areas in the east. **Agriculture and livestock rearing are the key economic activities.** Some households also engage in beekeeping and fishing. The most important food crops are fruits, vegetables, and cereal (sorghum and millet). Meanwhile, *qat* cultivation is widespread in the mountains, providing important sources of income for many households throughout the production and marketing chains. Hajjah borders Saudi Arabia to the north and, though transportation and trade through the border crossing of Haradh used to be economically significant, no trade has occurred there since late March 2015 due to the conflict. According to a 2014 Household Budget Survey, the poverty rate in Hajjah stood at 64 percent, while 2020 statistics suggest that the poverty rate is now 83 percent. Humanitarian assistance and daily wage labor (agricultural and non-agricultural) are the main sources of income for around 50 percent of households. Among the poorest households – including Hajjah’s large population of displaced households – begging is not uncommon. Hajjah has been one of the **most conflict-affected governorates** over the years. Roads have been damaged, forcing many traders and households to use alternative, rougher roads that often flood during the rainy season. Conflict has caused waves of significant population displacement, including in **mid-December 2018** when armed confrontations and shelling between IRG and SBA forces erupted in Haradh, Abs, and Hayran districts, and in 2019 when armed confrontations, airstrikes, and shelling intensified in Haradh, Hayran, Midi, Mustaba, and Abs districts, displacing an estimated **15,000 households**. In **2020, 2021, and early 2022**, re-escalation of conflict aggravated the situation and increased humanitarian needs. Many households were forced to move to a safer place, with some still unable to return home due to continued insecurity. Abs, Haradh, Midi, Al Jamimah, Mustaba, and Bakil Al Mir districts have experienced the greatest civilian casualties and destruction of infrastructure and livelihoods during the protracted conflict.

Despite the **ceasefire** in place from early April to early October, violence continued to be **reported** in front line areas. However, the number of battles declined during the truce period (Figure 8), and casualties declined dramatically compared to pre-truce levels. On the other hand, the number of incidents of explosions/remote violence increased, reaching pre-truce levels in September given escalation in the last two weeks prior to the expiration of the truce.

According to UNHCR, around **565,768 individuals** have been **displaced** in Hajjah since the start of the conflict. While many have returned home or resettled over the years, Hajjah is currently home to a large displaced population, mostly in Abs district. According to the global Camp Coordination and Camp Management (CCCM) cluster, **72,706 households** (436,298 individuals) were scattered across 484 displacement settlements as of July 2022. Implementing partners were providing to support to only around 50 percent of the displaced households across 26 percent of sites.

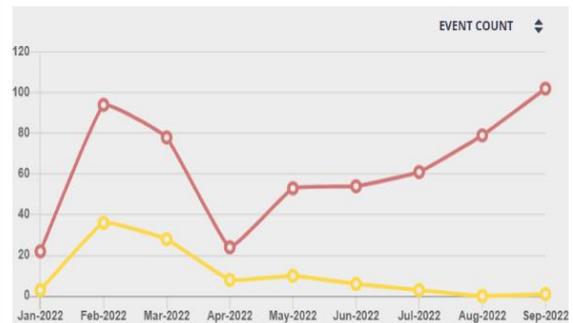
Late and significantly below-average rainfall during the March to May 2022 first rainy season caused some farmers to miss cereal planting or risk their **seeds decaying** in the ground. Following this, significantly above-average rainfall during the July to September second rainy season caused floods that damaged crops, property, roads, farms, and assets. In August, heavy seasonal rains caused **flash floods** in several parts of Yemen, including Hajjah, which was severely hit. **Abs** (hosting the largest

Figure 7. Reference map for Hajjah governorate



Source: OCHA

Figure 8. Incidents of explosions/remote violence (red) and battles (yellow), monthly, January 1 to September 30, 2022



Source: ACLED dashboard

population of displaced households) was affected, as was Mustaba, Al Mahabishah, Ash Shahil, Qafil Shamer, Khayran Al Muharraaq, and Aslem districts. Overall, more than 9,000 households were affected, and the flooding damaged schools, health facilities, water sources, homes, shelters, latrines, crops, and livestock. In addition, several bridges and roads in Abs, Aslam, and Mustaba districts were affected, impacting aid delivery and further restricting market access for many households.

Moreover, significantly above-average rainfall delayed the second planting season for some farmers. Due to the negative impacts of both rainy seasons, the October 2022 harvest is expected to be less than last year, reducing opportunities for income-earning from agricultural labor and increasing households' reliance on buying food from the market. In addition, the impacts of conflict continue to constrain crop production and marketing. In Midi district, farmers and livestock owners were unable to market their crops and livestock due to movement restrictions.

As in other SBA-controlled areas, fuel availability improved in Hajjah during the truce period. This has eased upward pressure on prices. As of August 2022, unofficial prices of petrol averaged 620 YER/L, similar to the same time last year and 43 percent lower than the peak levels recorded in March 2022 (Figure 8).

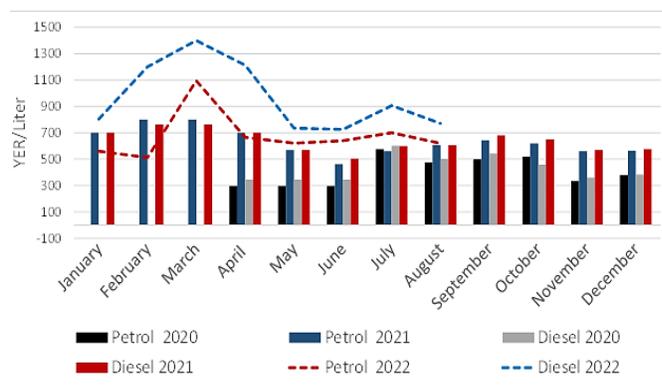
Hajjah is dependent on imports from Yemen's Red Sea ports for its staple food supply. Local traders in Hajjah access staple foods at wholesale prices from warehouses within regional trading centers and sell them in Hajjah markets at higher retail prices that account for transportation costs. Supported by increased food import levels through the Red Sea ports in 2022, staple foods have generally remained available in Hajjah markets.

However, prices remain significantly above average, constraining household purchasing power. As of August 2022, the cost of the MFB in Hajjah was 63,619 YER, representing a 19 percent increase compared to previous years, according to FAO data. However, the cost has remained relatively stable since May 2022.

Years of conflict and multiple additional shocks along with steadily declining purchasing power have eroded households' coping capacity, increasing reliance on support from humanitarian partners or family. Many poor households consider humanitarian food assistance to be a main source of food. Among displaced households, an estimated 40 percent access staple cereals primarily through humanitarian assistance. The recent reduction in assistance rations and delivery frequency impacted hundreds of thousands of people in Hajjah (Figure 10), according to data from FSAC.

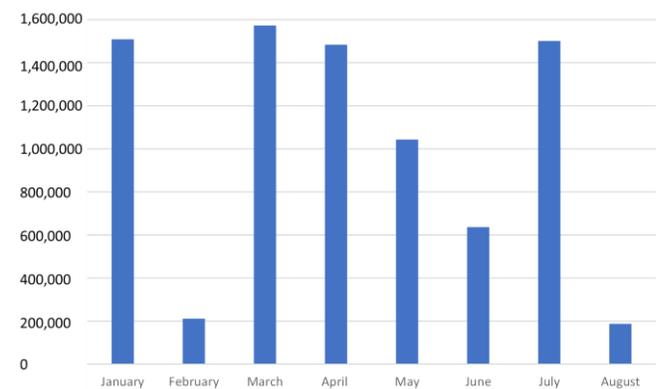
Despite some reductions in conflict, livelihoods and income-earning have not recovered, and ongoing conflict in front line areas continues to impact movement and trade. Additionally, flooding in the second rainy season disrupted livelihoods and destroyed crops and assets. Due to the impacts of below-average first season rainfall on planting and flooding during the second rainy season, food and income from crop production and agricultural labor is likely below average. Even with the recent WFP announcement of a slightly increased food ration (from around 50 percent to 65 percent of households' minimum monthly kcal needs), many poor households likely continue to face food consumption gaps given significantly above-average prices of food and essential non-food commodities. According to data from WFP, 58 percent of households reached in a mobile phone survey reported inadequate food consumption, up 21 percentage points compared to August 2021. Crisis! (IPC Phase 3!) outcomes likely persist at the area level, supported by ongoing assistance, though a subset of the population is likely in Emergency (IPC Phase 4) or worse given that humanitarian assistance benefits are shared between households (diluting the impact of kcal needs per household) and given that the overall level of need is outpacing the level of assistance, particularly in areas hosting large populations of displaced households.

Figure 8. Unofficial prices (YER/L) of petrol and diesel in Hajjah city, April 2020 to August 2022



Source: FEWS NET using WFP data

Figure 9. Number beneficiaries reached with emergency food assistance, monthly, January to August 2022



Source: FEWS NET using FSAC dashboard

Assumptions

In addition to the national-level assumptions, the following assumptions apply to this area of concern:

- Given the failure to extend the truce and increased momentum in hostilities since mid-September, it is expected that **conflict** will gradually resume in frontline districts including Haradh, Midi, and Hayran in the first half of the projection period, though levels of conflict will likely not reach pre-truce levels. However, conflict will likely intensify in the second half of the projection period given the anticipated failure of negotiations. Rates of conflict-driven **population displacement** are expected to increase alongside the re-escalation of conflict.
- While shortages of **staple wheat flour** are not anticipated, the resumption of conflict is likely to put upward pressure on prices due to increased transportation costs associated with traveling on more secure roads. Though prices in most markets are expected to follow trends in other SBA areas – decreasing overall throughout the projection period – prices in markets in front line areas will likely increase.
- Due to poor rainfall in both seasons, crop production in the main **cereal harvest** in October/November 2022 is expected to be less than last year. Due to late planting and seasonally declining winter temperatures, some farmers will likely be forced to harvest their crops prematurely for use as fodder instead of its intended use as a cereal.
- The re-escalation of conflict is expected to reduce the availability of **income-earning opportunities** due to the deteriorating business environment. However, in highland areas, some limited opportunities for agricultural labor associated with the cereal and citrus harvests are expected in October/November. Demand for agricultural labor in highland areas will then decline during the agricultural off-season before increasing again in late March 2023 with the start of land preparation activities. In lowland areas, the cereal, vegetable, and fruit (particularly mango) harvests will provide some limited seasonal access to food and income throughout most of the projection period.
- **Qat production** is likely to seasonally decline from around December 2022 to May 2023 due to lower temperatures, reducing income-earning from labor opportunities and other activities along the marketing chain.
- Given low demand due to poor household purchasing power, income from **livestock production and sales** will likely be lower than typical levels but will increase seasonally in March/April with the *Ramadan* and *Eid* holidays.
- Due to escalating conflict, **fishing** activities that have been banned throughout the governorate will likely remain suspended. As such, income from fishing will likely remain below average.

Most Likely Food Security Outcomes

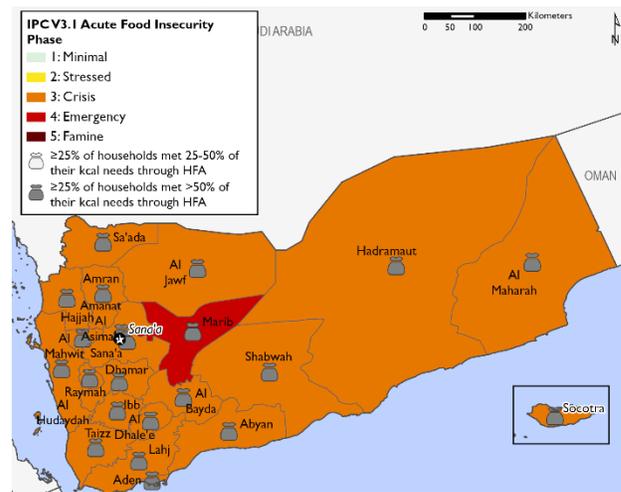
The October to November cereal harvest in the Hajjah highlands will likely provide many poor households with a limited supply of food from own production and some income from crop sales and agricultural labor opportunities. However, given poor households' limited land size and the negative impacts of recent floods, it is expected that cereal production will be below average. Most households will likely exhaust food stocks within two months and will have to fulfil their remaining minimum food needs by purchasing food from the market. Following the conclusion of harvesting, access to food and income will decline to seasonally low levels during the agricultural off-season before improving again with the start of agricultural activities around March. During this time, an increasing number of poor households will likely experience food consumption gaps, particularly in front-line areas given the likelihood of disruptions to livelihoods and rising market prices. Meanwhile, in lowland areas, some limited seasonal access to food and income is expected alongside harvesting activities throughout most of the projection period.

Throughout the projection period, escalation of conflict is expected to increasingly strain businesses and livelihoods and drive population displacement. Given above-average food prices, reduced humanitarian assistance benefits, and limited remaining livelihoods coping capacity, many poor and displaced households are expected to resort to more severe food consumption coping strategies, such as reducing the number of meals or going to sleep hungry. **Crisis! (IPC Phase 3!) outcomes** are expected at the area level **from October to January**. Displaced households will likely be worst-affected given that they have been separated from their traditional livelihoods and assets and are likely highly dependent on humanitarian assistance, with little to no ability to compensate for reductions in assistance. During the winter and agricultural off-seasons, access to seasonal food and income will decline, with an increase in the number of households facing Crisis (IPC Phase 3) or worse outcomes expected. Given the impacts of escalating conflict, and without a scale-up in assistance, **Emergency (IPC Phase 4) outcomes** are likely to emerge in the **February to May** period.

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

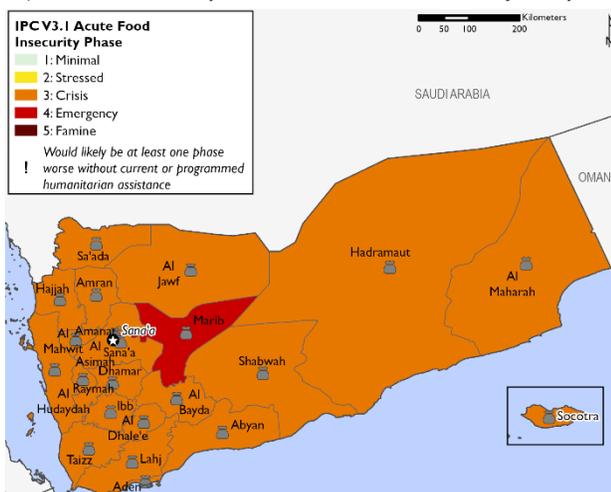
Each of these maps adheres to IPC v3.1 humanitarian assistance mapping protocols and flags, where significant levels of humanitarian assistance are being or are expected to be provided. 🏠 indicates that at least 25 percent of households receive on average 25 to 50 percent of caloric needs from humanitarian 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 food security outcomes, October 2022



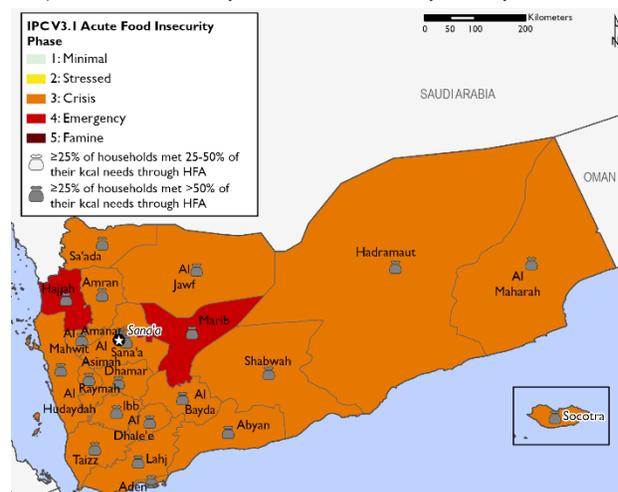
Source: FEWS NET

Projected food security outcomes, October 2022 to January 2023



Source: FEWS NET

Projected food security outcomes, February to May 2023



Source: FEWS NET

FEWS NET's classifications are IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

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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.](#)