



GIEWS Country Brief Yemen

Reference Date: 21-December-2018

FOOD SECURITY SNAPSHOT

- Conflict continues to threaten agricultural livelihoods
- Below-average cereal harvest estimated for 2018, stable cereal import requirements
- Almost 20 million people estimated to be food insecure in absence of assistance

Conflict continues to threaten agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities differs greatly depending on the location. In Southern uplands, with one rainy season, the wheat and maize harvest was completed in November. In Central Highlands, with two distinct cropping seasons, planting of irrigated wheat, for harvest from March, took place in December. In coastal areas, harvesting of millet, planted in May, started in December.

Persistent conflict continues to seriously compromise all economic activities, including agricultural livelihoods. Supply of urea, seeds and fuel is particularly scarce in Aden, Hodeidah and Al Baidha governorates, while high prices are reported in all governorates. High fuel prices are constraining agricultural activities, particularly those related to irrigated crops, with consequent increases in the share of rainfed crops which, in turn, bear lower yields. In most conflict-affected areas, hired agricultural labour tends to be replaced by family labour to cope with the increased costs of production. At the same time, many rural households rely on casual labour opportunities as their main source of income. The severity of the impact varies across the country depending on the security situation.

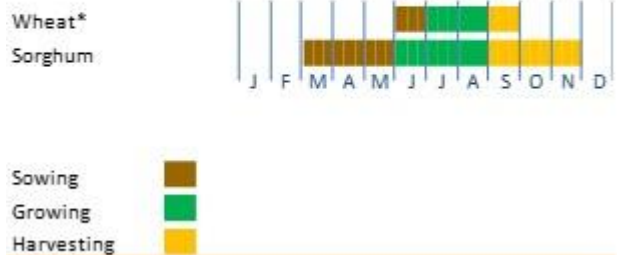
Below-average cereal harvest in 2018

Total cereal production in 2018 is estimated at 440 000 tonnes, slightly below the previous year's conflict-affected harvest, but over 30 percent below the five-year average.

On average, total domestic cereal production covers less than 20 percent of the total utilization (food, feed and other uses). The country is largely dependent on imports from the international markets to satisfy its domestic consumption requirement for wheat, the main staple. The share of domestic wheat production in total food utilization in the last ten years is between 5 to 10 percent, depending on the domestic harvest.

Yemen

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Yemen

Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
Sorghum	319	200	200	0.0
Wheat	184	150	140	-6.7
Millet	69	50	50	0.0
Others	81	50	50	0.0
Total	653	450	440	-2.2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2018 marketing year (January/December) is estimated at average 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

As of mid-November 2018, in-country food stocks are estimated at 1.1 million tonnes, including about 590 000 tonnes of wheat grain and flour, expected to cover the national requirement for nearly three months. However, it is reported that stocks of other commodities, such as sugar and vegetable oil, will cover the needs for only about six weeks. The intense fighting around Hodeida, the major entry port, that constrained imports to the country in the past months, appears to be potentially abated after an agreement on ceasefire was reached in mid-December 2018.

Almost 20 million people estimated to be food insecure in absence of assistance

According to the Integrated Food Security Phase Classification, in the December 2018-January 2019 period, some 15.9 million people (corresponding to 53 percent of the population) are facing severe acute food insecurity (IPC Phase 3 and above), including 63 500 in Phase 5: "Catastrophe". It is estimated that, in the absence of humanitarian food assistance, about 20 million people (or 67 percent of total population) would be in need of urgent action to save lives and livelihoods. This would include about 240 000 people in Phase 5.

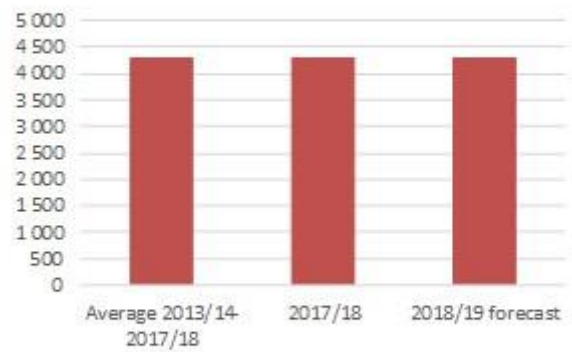
The Yemeni Riyal (YER) further weakened in October 2018, reaching its lowest level ever of YER 800 per USD, about 240 percent below its pre-crisis levels. The low value of the local currency, coupled with transportations bottlenecks and continued fighting, translates into high prices, particularly of imported goods. High food prices continue to limit the households' access to food. Significant price differences persist among markets and prices across the country are generally well above the pre-crisis levels (February 2015), in some cases multiple times.

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Yemen

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.