Conflict continues to threaten agricultural livelihoods

Due to a variety of natural conditions, the calendar of agricultural activities differs depending on location. In Central Highlands, with two distinct cropping seasons, harvesting of rainfed wheat, planted in July, will start in October. In Southern Uplands, with only one rainy season, the sorghum harvest just started in mid-September. In coastal areas, forage sorghum is also being harvested.

Persistent conflict continues to seriously compromise all economic activities, including agricultural livelihoods. The supply of urea, seeds and fuel is particularly scarce in Aden, Hodeidah and Al Baidha governorates, while high input prices are reported across the whole country. 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. Hired agricultural labour tends to be replaced by unskilled family labour to cope with the increased costs of production. By replacing hired labour by family labour, livelihoods of many landless rural households relying on casual labour opportunities as their main source of income are imperilled.

Outbreaks of Fall Armyworm (FAW, Spodoptera frugiperda), which was first detected in the country in July 2018, were reported on 2019 maize crops. While only a small maize crop, averaging about 40 000 tonnes in the past five years, is grown in Central Highlands (where it was harvested in July) and in Southern Uplands (to be harvested in October), FAW outbreaks jeopardise livelihoods. FAW, in its larval stage, feeds on a variety of crops, including maize, millet and sorghum.

In August 2019, swarms of locusts moved in the highlands and reached the Red Sea and Gulf of Aden coasts. Unusually good rains in August 2019 allowed breeding, which extended to the Aden coastal plains but declined in the interior as conditions dried out and locusts moved to coastal areas. The country’s capacity to
control pests has been seriously eroded as vital equipment, such as four-wheel drive vehicles, has been looted.

**Well below-average cereal harvest in 2019**

Taking into account conflict-related constraints as well as outbreaks of pests, total cereal production in 2019 is forecast at 385 000 tonnes, about 12 percent below the previous year’s harvest and 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 food assistance and commercial imports 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.

The import requirement for cereals to guarantee a sufficient calorie intake in the 2019 marketing year (January/December) is estimated at an average level of 4.3 million tonnes, including 3.2 million tonnes of wheat, 700 000 tonnes of maize and 400 000 tonnes of rice.

It is estimated that, between January and July 2019, about 3.8 million tonnes of food (out of which 60 percent was wheat grain and flour) entered the country through maritime seaports (Aden, Al Hodeidah, Al Salif and Al Mukalla) and land ports (Shahin and Wadiea’ah). About 95 percent of goods were imported via Aden, Al Hodeidah and Al Salif seaports. The total amount is 7 percent higher than in the corresponding period in 2018.

**Over 24 million people in need of humanitarian assistance**

Nearly 80 percent of the total population, 24.1 million people, require some form of humanitarian assistance and protection.

At the national level, although food retail prices are relatively stable month on month, in many cases they exceed their pre-crisis levels (February 2015) by two or three times. At the local level, prices respond to prevailing conditions. Market disruptions in Aden during the first two weeks of August resulted in severe shortages of vegetables and prices increased sharply. The increase by almost 50 percent in the official retail price of cooking gas cylinders is likely to have negative consequences on households’ food security. In August 2019, the national average exchange rate was YER 585 per USD, 2 percent below the previous month, significantly stronger than its lowest point value of YER 800 per USD (about 240 percent below its pre-crisis levels) in October 2018.

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