

Food insecurity

Ethiopia, Nigeria, Somalia, South Sudan, and Yemen

Food security remains a major humanitarian concern in 2018 in multiple contexts. In this report, ACAPS highlights five of the worst affected countries, where large populations are food insecure, and where households and areas are either already in Catastrophe or Famine levels of food insecurity (IPC Phase 5), or are at risk of deteriorating into this situation.

In Ethiopia, prolonged drought, fall armyworms, and insecurity are driving a deteriorating food security situation. In Nigeria, although harvests, assistance and security improvements in the second half of 2017 helped improve food security overall, pockets in the conflict-affected northeast are still in IPC Phase 5, particularly those in hard to reach areas. Food security in Somalia deteriorated again in 2017 after four consecutive years of inadequate rainfall. Although projections for 2018 point to a slight improvement on the current situation, substantial recovery in Somalia will require a sustained period of good weather conditions and stability, which remains unlikely given the ongoing insecurity. In South Sudan, humanitarian assistance has been vital to survival in conflict-affected areas and households already in IPC Phase 5. While the number of people at this level of food insecurity has declined in 2017, the situation is expected to remain critical in 2018. Food insecurity is also widespread in import-reliant Yemen, as the conflict continues and the blockade prevents the delivery of essential goods and humanitarian supplies. Without assistance, some 8.4 million people currently in IPC Phase 4, risk falling into IPC Phase 5 over the coming year.

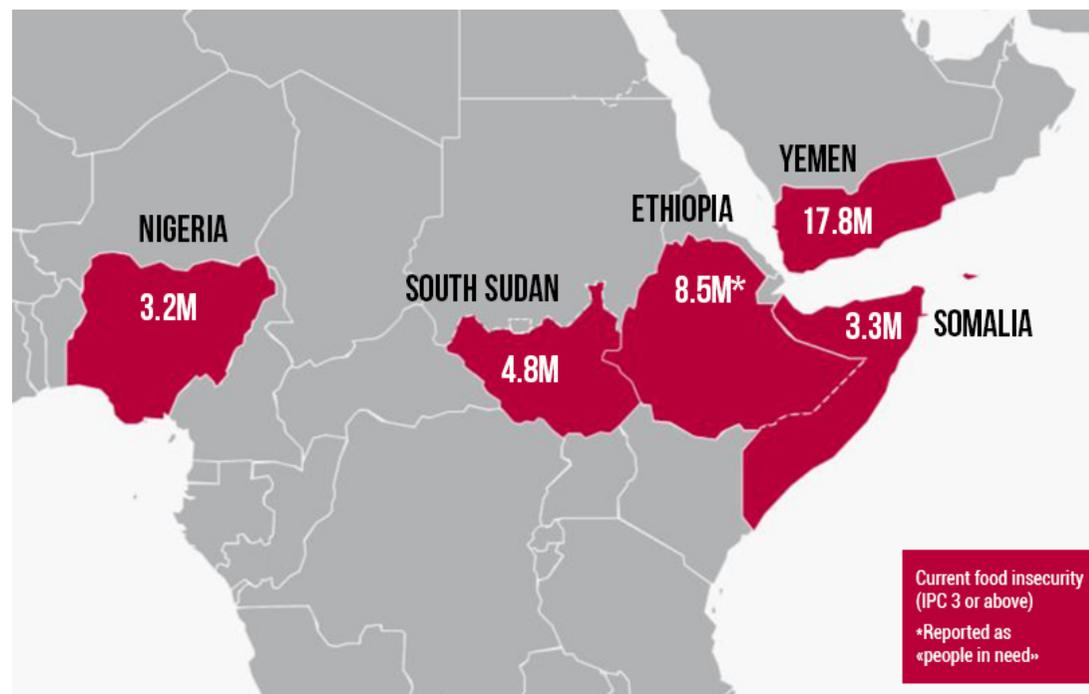


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Methodology

This report analyses a range of government, UN, NGO and media sources to summarise the food security situation in five key countries. Reference to IPC phases in the report refer to the recognised five-level classification system which estimates household and/or area-based food insecurity. The phases are: Phase 1 (Minimal), Phase 2 (Stressed), Phase 3 (Crisis), Phase 4 (Emergency), Phase 5 (Famine (areas)/Catastrophe (households)). Sources referring to severe food insecurity often vary in meaning, and can indicate IPC Phase 3 or worse, or IPC Phase 4 or worse, depending on the context. To avoid confusion, this report refers as far as possible to IPC phases, and avoids colloquial references to severe food insecurity or *famine*.

ACAPS welcomes all information that could complement this report. For additional comments or questions please contact Alex Odium at ao@acaps.org

Ethiopia

Overview

The food security situation in Ethiopia deteriorated sharply in 2017. The estimated food insecure population increased from 5.6 million in December 2016 to 8.5 million in August 2017, with prolonged drought, conflict and insecurity, and crop disease among the main drivers. Underlying vulnerability is also high, with some four million people continuously dependent on the government's Protective Safety Net Programme (PSNP) for food assistance. Somali region in the southeast was the most affected in 2017 and is likely to be most affected in 2018. 3.7 million people in the region are reliant on humanitarian food assistance (WFP 12/2017). Within the region, Dollo, Korahe, and Jarar zones, along with areas in Afder and Liben zones, are the most affected (FEWS NET 11/2017).

Prolonged drought conditions following consecutive poor rains since October 2016 are a key driver of food insecurity. In Somali region, the 2016 *deyr/hageya* rains from October–December failed and were followed by a very poor performance of the *gu/genna* rains from March–June 2017. This negatively impacted on pastoral and agro-pastoral households in the Somali region of Ethiopia. Water shortages and lack of food for animals resulted in a reduction of livestock productivity and high livestock mortality rates (GIEWS 28/09/2017).

The 2017 *deyr/hageya* rains were better than in 2016, but northern areas of Somali region continued to receive below average rainfall. Overall the rain was not adequate to offset the previous negative impacts of the drought on pastoral households (FEWS NET 01/2018).

Most of Ethiopia's food produce comes from the west, centre and north of the country, which receive *kirmet* and *belg* rains and have two main harvests, the *meher* and *belg* harvests. In 2017, *belg* rains in February began late and were below average, delaying the harvest and leading to reduced crop output. The *kirmet* rains in June 2017 were more favourable. However, they were below average in areas of central and eastern Oromia and Southern Nations, Nationalities and Peoples' Region (SNNPR). As such, the *meher* harvest output was overall lower than normal (DRMTWG 11/2017).

Another factor driving the crisis is the fall armyworm outbreak, which spread from the south in April 2017 to affect large parts of the country. Multiple regions reported between 10% and 30% of crops were affected last year, and there are fears maize crops in particular could be impacted again in 2018 (The Reporter 10/02/2018).

Ongoing conflict in border areas between Oromia and Somali regions since early September 2017 is further aggravating food insecurity. The conflict has disrupted supply routes and displaced up to one million people, including to areas experiencing ongoing food insecurity due to the drought. (OCHA 23/01/2018).

Food availability

Poor rainfall over multiple seasons has created a knock-on effect, delaying planting and harvest cycles, and in turn reducing food production and availability. The late arrival of *belg* rains delayed that harvest, then delayed planting ahead of the *kirmet* rains for the *meher* harvest. Moreover, farmers were forced to choose crops with shorter planting cycles but lower yields, which subsequently reduced the overall food availability of long-cycle, high-yielding staple crops such as maize, sorghum and millet (FAO 22/11/17). Conflict has also decreased food availability on markets in the southeast of Ethiopia (OCHA 23/01/2018).

Food access

Over 80% of Ethiopia relies on agriculture and livestock as their primary source of food and income. In pastoral areas, such as the Somali region, households derive their purchasing power, and consequently their access to food, from their pastoral livelihood activities (FAO 31/05/2017). As household incomes have decreased, many households have been forced to sell much of their herd to afford food (GIEWS 28/09/2017). Even after a good rainy season, it can take up to ten months for cattle production to recover, and herd sizes will take from two to four years to replenish. Food access will likely remain limited during this time (DRMTWG 30/9/17; FAO 31/05/2017).

Prices of maize increased between January and September 2017 due to the poor performance of the *belg* harvest and the impact of the fall armyworm infestation on the main *meher* harvest. While prices began to decrease in October and continued to decline in November 2017 with the start of the *meher* harvest, they remained 55% above 2016 prices as of December. In addition, seasonal price increases for maize can again be expected from February onwards as the lean season commences (FAO 12/2017). The price of wheat, meanwhile, continues to increase (FPMA 11/12/17).

In the Somali and Oromia regions of the southeast, conflict has disrupted supply routes and reduced deliveries, driving up food prices in markets. (OCHA 23/01/2018).

The insecurity is also hampering access to food for people who are reliant on humanitarian assistance as aid supplies are being disrupted or delayed. (WFP 12/2017; OCHA 23/01/2018). Food deliveries from the Hararge highlands to the Somali region have already been disrupted, resulting in food shortages in markets (OCHA 23/01/2018).

Outlook

Between five and seven million people will be targeted for assistance in the first half of 2018, but the number of people in need is likely to be higher. 60% of those are in pastoral areas and consist of households whose purchasing power has been reduced

due to livestock losses. The other 40% are people affected by erratic rains resulting in decreased crop production in 2017 (GoE 18/01/2018).

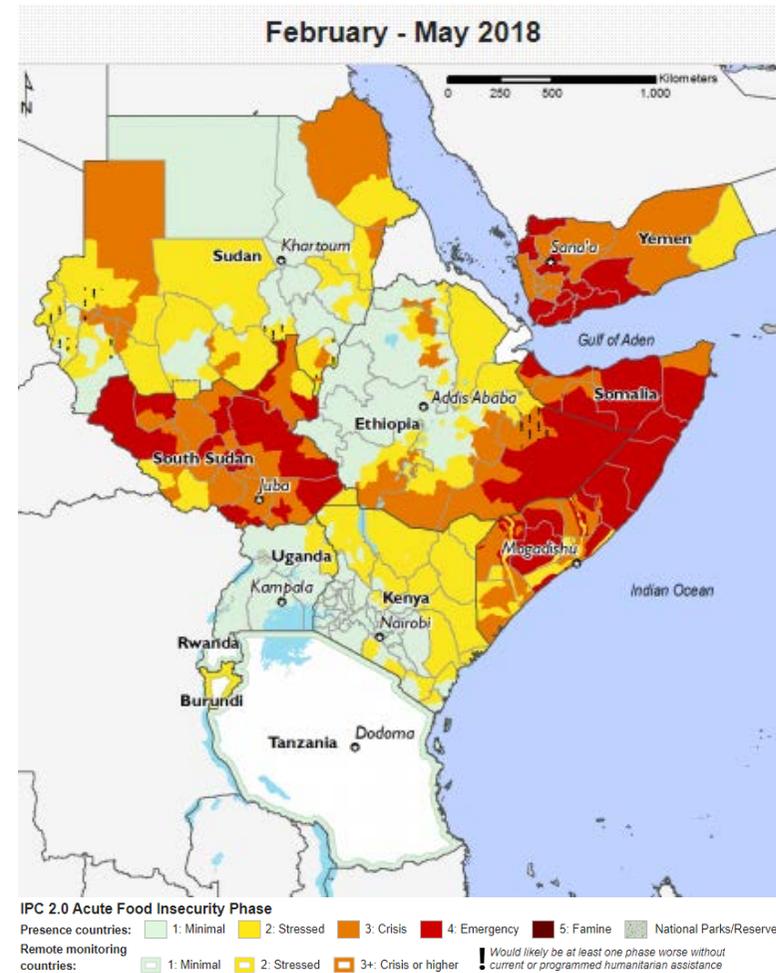
While the 2017 *deyr/hageya* rains were an improvement compared with previous rains, they were not sufficient to assist the recovery of pastoral households who have lost or sold their livestock. This will result in a poor food security outlook for pastoral households (DRMTWG 30/9/17).

In addition, vegetation conditions remain significantly below-average across south eastern Ethiopia and forecasts already suggest that rainfall for the *gu/genna* rains in March–June will likely be below average (FEWS NET 10/11/17; FEWS NET 01/2018; DRMTWG 15/11/17). The areas most impacted will be Dollo, Korahe, and Jarar zones and parts of Afder and Liben zones. The majority of households in these areas are likely to be in IPC Phase 4, while some households will reach IPC Phase 5 through May 2018 (FEWS NET 11/2018).

In agricultural areas, such as central and eastern Oromia and Southern Nations, Nationalities and Peoples’ Region (SNNPR), where 2017 harvests were poor, households are likely deteriorate into IPC Phase 3 levels of food insecurity during the February–June lean season (USAID 05/01/2018).

Food insecurity will also increase in *meher* dependent areas of eastern Amhara, southern Tigray, and eastern Oromia during the June–September lean season there (FEWS NET 1/12/17).

Projected food insecurity, Horn of Africa region



Source: FEWS NET 11/2017

Nigeria

Overview

Food security outcomes improved in Nigeria in 2017, though the situation remains particularly concerning in three northeast states of Adamawa, Borno and Yobe. In the northern half of the country that is assessed for food insecurity (16 out of Nigeria's 36 states), over seven million people were estimated to be in IPC Phase 3 or worse at the beginning of the lean season from March to May 2017, and this number was projected to rise over the course of the lean season until August 2017. Following the harvests, the latest assessments showed seasonal improvements, with the number of food insecure people declining significantly. From October to December 2017, 3.2 million people in the assessed states were in IPC Phase 3 or worse. (CADRE HARMONISÉ 02/11/2017; CADRE HARMONISÉ 10/03/2017).

Despite overall improvements across the assessed states, the food security situation in northeast Nigeria, where violence and insecurity has displaced over 1.7 million people since 2014, remains particularly acute (FAO 12/2017; IOM 10/2017). In Adamawa, Borno, and Yobe states, around 2.6 million people were in IPC Phase 3 or worse in late 2017, including 455,000 people in IPC Phase 4 (CADRE HARMONISÉ 02/11/2017). Most of those in IPC Phase 3 levels are in Borno, the state worst-affected by conflict between Boko Haram and government forces. Conflict-affected households in areas around the Sambisa forest are experiencing elevated food insecurity and malnutrition levels, and areas beyond the reach of aid actors are thought to be at risk of IPC Phase 5 (FEWS NET 12/2017). 1,800 people were also in IPC Phase 5 in the north of Adamawa state (CADRE HARMONISÉ 02/11/2017).

Nevertheless, although food insecurity remains extremely concerning in northeast Nigeria, the situation is better than one year ago, not only due to seasonal food availability following harvests, but also because of improvements in security, access, and delivery of aid (FEWS NET 12/2017).

Food availability

Production

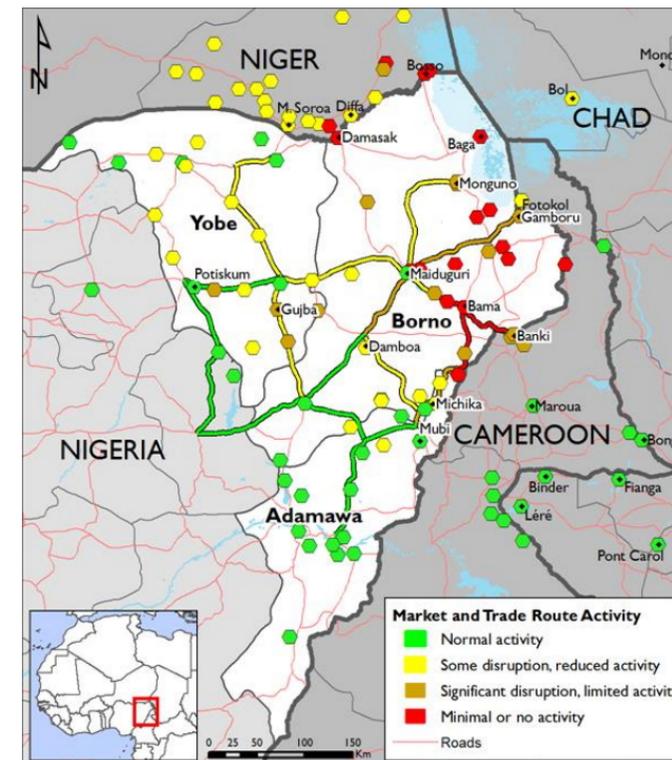
The production of staple food and cash crops is below average in conflict-affected Adamawa, Borno, and Yobe states. In these areas livelihood activities have been negatively impacted by insecurity and displacement. Planting and other agricultural activities are also disrupted, which results in reduced food production (CADRE HARMONISÉ 02/11/2017). Harvests of staple crops such as maize, cowpea, groundnut, millet and sorghum were lower in 2017 in the northeast due to insecurity and an early end to the rainy season in September. Sorghum production was particularly affected. Low production means household food stocks are low, and many households in conflict-

affected areas are reliant on market purchases or humanitarian assistance. (FEWS NET 12/2017).

Trade and supply routes

With production limited, the availability of food depends more heavily on trade to bring supplies from other regions to markets across the northeast. However, trade corridors are regularly disrupted due to sporadic attacks and military operations (FEWS NET 12/2017). In 2017, there were indications that the trade and supply situation may be improving, with central livestock markets resuming in Adamawa and Borno states (FEWS NET 12/2017). Trade routes to Damboa (Borno state) and Mubi (Adamawa state) are functioning normally. However, traders across the northeast report varying abilities to supply any potential increase in demand. This suggests that while there is potential for cash-based interventions to stimulate the local economy, they should be gradual, in order for markets to cope with the increased demand (FEWS NET 11/12/2017).

Disruption to markets and trade, northeast Nigeria, December 2017



Source: FEWS NET 12/2017

Food access

Physical

Insecurity constrains humanitarian access to populations in need of food assistance to a varying degree across northeast Nigeria. While parts of Adamawa and Yobe states are reported to be accessible, access to parts of Borno state is heavily constrained, and sometimes only possible with armed escort or by aircraft (OCHA 31/10/2017; LOGISTICS CLUSTER 01/12/2017). Multiple LGAs in the border areas are completely inaccessible for humanitarian actors. In the absence of adequate information, some inaccessible areas continue to be estimated at risk of IPC Phase 5 (FEWS NET 12/2017).

The access to food for affected populations in IDP sites is also partly constrained: although 90% of IDPs in displacement sites have access to food onsite, 5% only have access to food offsite, and the remaining 5% are reported to have no access to food distributions (IOM 02/2018).

Even in more secure areas of northeast Nigeria, physical constraints including poor road conditions hamper the provision of food supplies, as well as people's access to markets and regular livelihood activities (OCHA 24/11/2017).

Economic factors

Food prices across northern Nigeria are between 30% and 170% higher than the five-year average. Cereal prices are above the five-year average and have increased since the 2016 prices. Legume and tuber prices are also above the long-term average (CADRE HARMONISÉ 02/11/2017).

Staple food prices are higher in the conflict-affected northeast compared to other areas of the country, and they are projected to remain high throughout 2018. The price of local-milled rice has increased in the northeast, despite decreasing across the country compared to 2016 levels. Imported rice prices have also increased. The price of maize is elevated in most markets, including the northeast. A major reason is the high cost of transporting goods from surplus producing areas to markets in areas of need (FEWS NET 11/12/2017).

The weak Nigerian currency also has a negative impact on food access. While the weak currency is favourable to food producers who have been increasing their exports, it has limited local availability and kept the price of basic foods and goods at high levels on local markets. In turn, the weak currency has elevated the price of imports, fuel and inputs. Overall, reduced household income and purchasing power coupled with higher prices have harmed food access (FAO 12/2017).

Outlook

Food security for Nigeria is expected to worsen in the coming months, in line with seasonal trends. In the assessed areas of northern Nigeria, the number of people expected to be in IPC Phase 3 (Crisis) or worse during the peak lean season from June to August 2018 is 4.8 million. Although the situation is unlikely to reach the levels seen during the same lean period a year earlier, the high levels of food insecurity remain concerning.

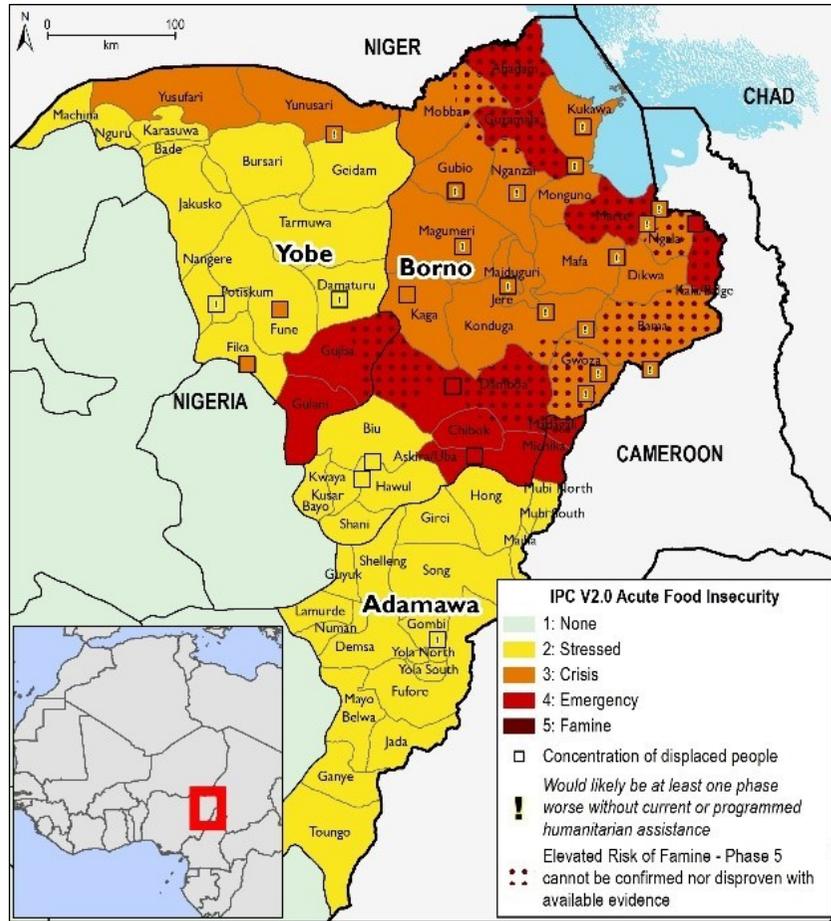
The northeast states of Adamawa, Borno and Yobe, where food insecurity is worst, and where conflict and insecurity persist, will remain particularly concerning in 2018. As the food security situation deteriorates over the coming months, and food assistance measures remain insufficient, 3.7 million people in those three states are projected to be in IPC Phase 3 or worse from June to August 2018. Of these, 802,000 are projected to reach IPC Phase 4 conditions, while some 12,500 people in inaccessible areas are projected to be in IPC Phase 5 (CADRE HARMONISÉ 02/11/2017). While the food security projections for the northeast in 2018 are not as negative as those made one year earlier, a sustained period of stability is needed in northeast Nigeria before food security improves significantly.

IPC levels, 2017-2018 in Nigeria

	Nigeria (16 assessed states)		Northeast states (Adamawa, Borno, Yobe states)			
	IPC 3	>IPC 3	IPC 3	IPC 4	IPC 5	>IPC 3
Mar-May 2017 (current)	5,637,756	7,065,539	3,239,932	1,383,890	43,894	4,667,716
Jun-Aug 2017 (projection)	7,394,042	8,926,181	3,716,186	1,482,089	50,051	5,248,326
Oct-Dec 2017 (current)	2,701,278	3,158,182	2,106,717	455,058	1,846	2,563,621
Jun-Aug 2018 (projection)	3,990,118	4,805,189	2,874,331	802,535	12,536	3,689,402

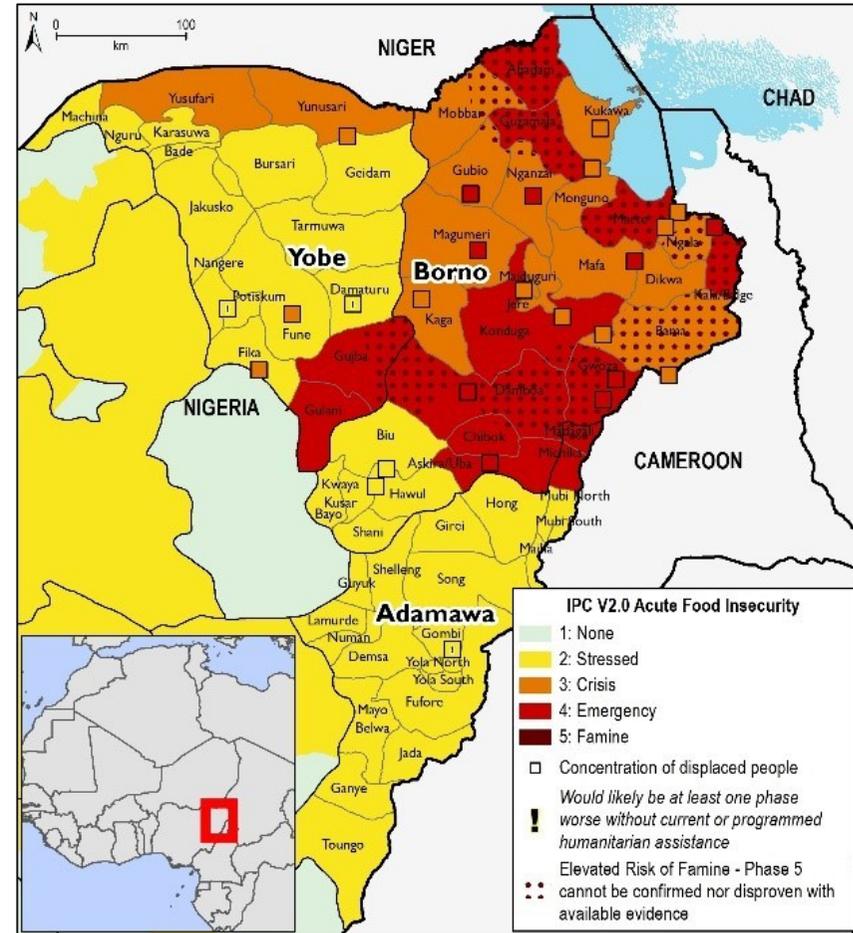
Sources : CADRE HARMONISÉ 02/11/2017; CADRE HARMONISÉ 10/03/2017

Current food insecurity, northeast Nigeria



Source: FEWS NET 12/2017

Projected food insecurity, northeast Nigeria



Source: FEWS NET 12/2017

Somalia

Overview

With ongoing drought and insecurity, the number of people in IPC Phase 3 and IPC Phase 4 increased in Somalia in 2017, from 1.1 million at the beginning of the year to 3.3 million by October (FEWS NET 11/2017; FEWS NET 10/2016). Although *Deyr* rains from October to December 2017 brought some seasonal improvement in food security and income, as well as in pasture conditions in pastoral livelihood zones, the rains were below-average in most of Somalia (FEWS NET 01/2018). As a result, the number of people in IPC Phase 3 and 4 in January 2018 was 2.7 million, more than double the number a year earlier (FEWS NET 01/2018). Moreover, without humanitarian assistance, many livelihood zones in IPC Phases 1–3, particularly in central and southern Somalia, would currently likely be at least one phase worse (FEWS NET 01/2018).

Four consecutive seasons of poor or below average rainfall have eroded the coping capacities of affected households, reduced food production, and caused livestock losses (FEWS NET 11/2017). The drought has induced large-scale displacement, particularly since the failed 2016 *Deyr* rainy season from October to December that year. Between November 2016 and the end of January 2018, over one million people had been displaced due to the drought (UNHCR 02/2018). Although drought-related displacement declined towards the end of 2017, it slightly increased again in January 2018, and is likely to remain a concern this year (UNHCR 02/2018).

Violence and insecurity compound the effects of drought on food security in Somalia. Conflict between Al Shabaab and the government, as well as rivalries between clan-based militias, drive displacement, disrupt trade, and impede humanitarian access to populations affected by food insecurity (FEWS NET 10/2017; FEWS NET 01/2018). From January 2017 to the end of January 2018, some 225,000 people were displaced by conflict. Agricultural activities are often interrupted when displacement occurs, and assets are lost in the process, exacerbating food insecurity (UNHCR 02/2018; FEWS NET 10/2017).

Food availability

Production

Food availability has been impacted by the effect of consecutive droughts. Below average *Deyr* season rains from October to December 2017 have again limited food production prospects (FEWS NET 11/2017). Rainfall was 50% below-average in October, and again below-average during late November. Above-average rainfall during early November in central and southern regions was not enough to offset the seasonal deficit, and most regions received no rainfall in December (FEWS NET 23/11/2017, FEWS NET 12/11/2017, FEWS NET 13/12/2017). As a result, cereal production of the 2017 *Deyr* season is estimated to be at 78,000 metric tons, which is about 20% below the long-term average

(FEWS NET 01/2018). In northwest Somalia, cereal production of the *Gu/Karan* harvest in November is estimated at 16,000 metric tons, which is about 70% below the 2010-2016 average (FEWS NET 01/2018). This is compounding cereal production deficits from the last *Gu* season (April–June 2017), which was 13% below the five-year average (FSNAU 28/09/2017).

Inadequate rainfall also has short and long term negative impacts on pastoral livelihoods in Somalia. Although vegetation conditions were improving with the *Deyr* rains in some localised areas by the end of 2017, water deficits in some pastoral livelihood zones in northern, central and Gedo regions were expected to continue into 2018 (FEWS NET 01/2018; FEWS NET 13/12/2017). Moreover, many pastoralists are still recovering from the long-term effects of recent droughts on their herds, which continues to reduce livestock productivity and reproduction rates (FEWS NET 01/2018).

Food access

Physical

Conflict continues to pose physical and security constraints, which impact on access to food and humanitarian aid. Most areas in south and central Somalia are inaccessible to humanitarian organisations (INSO 15/06/2017). Although aid actors scaled up their food assistance response in 2017 where possible, access constraints remained problematic (FEWS NET 01/2018). Over 165 incidents, including staff being killed, injured, and abducted were reported in 2017 (OCHA 27/12/2017; OCHA 31/10/2017). Access restrictions on many roads means that many people in need, for example in Baidoa (Bay region), can only be reached by plane (Logistics Cluster 14/06/2017; Logistics Cluster 31/10/2017).

Economic factors

Cereal prices increased in 2017 compared to annual averages in most regions of Somalia because successive poor harvests have reduced supply (FSNAU 28/12/2017). In October, maize prices in Qorioley, Lower Shabelle, were 24% higher than October 2016, and 43% above the five year average (FEWS NET 11/2017). Although some grain prices decreased temporarily in October and November 2017 due to the availability of the *Gu* harvest, this is largely the result of seasonal improvements, and not yet an indicator of sustained improvement. For example, sorghum prices in Baidoa, Bay region declined by 5% between October and November, but the prices were still 24% higher than the five-year average (FEWS NET 12/2017).

Low production also results in reduced farm labour demand, limiting livelihood opportunities, which particularly impacts poor households in some areas of southern and northwest Somalia (FEWS NET 01/2018).

However, in urban areas, access to food has improved towards the end of 2017 due to more employment opportunities and declining food prices (FEWS NET 01/2018).

	IPC Phase 2	IPC Phase 3	IPC Phase 4
January 2018 (current)	2,794,000	1,466,000	180,000
February–May 2018 (projection)	2,711,000	2,232,000	496,000

Sources: FEWS NET 01/2018, FSNAU 29/01/2018

Outlook

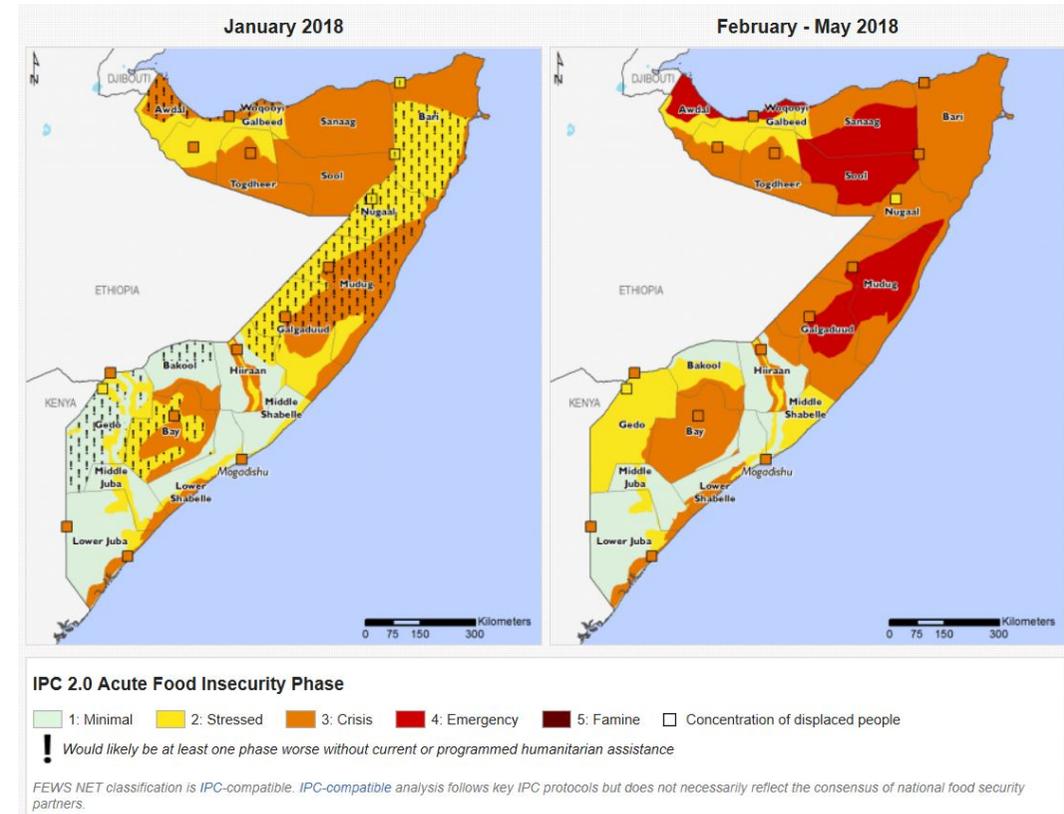
Large-scale humanitarian assistance and the October–December harvests and *Deyr* rains have led to an improvement of the food security situation at the end of 2017 and into January 2018 (FEWS NET 01/2018). However, improved food security for agropastoral and agricultural households following the *Deyr* harvest will not be sustained long into 2018 as seasonal deterioration sets in compounded by the ongoing long-term effects of previous years (FEWS NET 12/2017). Moreover, further deterioration is likely if large-scale humanitarian assistance is absent (FEWS NET 01/2018). In addition, the 2018 *Gu* season from April to June is currently forecast to be below-normal in most parts of Somalia (FAO 15/02/2018). There is a chance of a La Niña weather event occurring during the rainy season, which could further reduce rainfall (FAO 15/02/2018).

Overall, from February to June 2018, 2.2 million people in Somalia are projected to be in IPC Phase 3 and 496,000 in IPC Phase 4 (FEWS NET 01/2018). In central and southern Somalia, many IPC Phase 2 livelihood zones will likely fall into IPC Phase 3 from February to June, while many IPC Phase 3 zones in northern and central Somalia are expected to deteriorate into IPC Phase 4 (FEWS NET 01/2018). Zones of concern that are currently in IPC Phase 3 are Addun Pastoral in central Somalia, Guban Pastoral in Somaliland, and Northern Inland Pastoral in Sanaag and Sool (FEWS NET 01/2018).

Although the risk of IPC Phase 5 is lower than last year, consecutive below-average rainy seasons have eroded households' livelihoods and coping mechanisms, so their vulnerability to shock remains high (FEWS NET 01/2018, FEWS NET 12/2017). December 2017 analyses were projecting that some households in Addun Pastoral, Guban Pastoral, and coastal Deeh Pastoral livelihood zones were at risk of falling into IPC Phase 5, as livestock are in very poor conditions and thus cannot be sold (FEWS NET 12/2017). Poor households in some agropastoral areas of Lower Shabelle, Hiraan, and Togdheer were also projected to be at risk of deteriorating into IPC Phase 5, as many have lost or sold most livestock and moved into IDP settlements, where dependence on assistance is high (FEWS NET 12/2017).

Food insecurity in the main IDP settlements, including Mogadishu, Baidoa, Dhusamareb, and Dolow is currently IPC Phase 3 level and is projected remain so until May 2018 (FEWS NET 01/2018).

Current and projected food insecurity, Somalia



Source: FEWS NET 01/2018

South Sudan

Overview

In February 2017, over 100,000 people were estimated to be in IPC Phase 5 levels of food insecurity in South Sudan, with three counties in Unity and Jonglei the worst affected. This decreased to around 45,000 people in June, mostly due to multi-sectoral humanitarian assistance (FAO 01/2018). However, six million people remained in IPC Phase 3 or worse just prior to the harvest in September 2017, 30% more than at the same time in 2016. Following the harvest, the number of people in IPC Phase 3 or worse had decreased to 4.8 million by December 2017. Current projections estimate that between January and March 2018, 5.1 million people, half the total population of the country, will reach IPC Phase 3 or worse food insecurity (FAO 01/2018).

Conflict between government and opposition forces, inter-communal fighting, and a collapsing economy and hyperinflation are the primary drivers of the food security crisis in South Sudan (OCHA 07/12/2018). Widespread insecurity continues to cause significant displacement, which disrupts livelihood activities and exacerbates food insecurity. Affected populations are depleting their coping mechanisms year on year. Furthermore, humanitarian access is increasingly limited: food deliveries by road are often limited to air drops, as roads are too dangerous or impassable, particularly in rainy season (OCHA 17/08/2017; Deutsche Welle 06/11/2017).

In the final months of 2017 the level of conflict between government and opposition forces increased in several areas of the country. This is in line with seasonal trends: as floods begin to recede it becomes easier to launch offensives. Moreover, fighting during the rainy season between June and October had been above average, most notably in Ayod in Jonglei, Leer and Mayendit in Unity, and Mundri in Western Equatoria (FEWS NET 12/2017; OCHA 07/12/2017). Between October and December, inter-communal fighting also increased in Lakes and Jonglei (FEWS NET 12/2017).

Food availability

Production

Favourable weather conditions in late 2017 did not prevent a below average harvest, mostly because conflict reduced planting throughout the year. Poor harvests are of particular concern in the Greater Equatoria region, the former breadbasket of the country: in Central Equatoria, around 75% of people are reportedly displaced, which has disrupted agricultural livelihood activities, including planting (FAO 01/2018). While the harvest between October and December resulted in increased food stocks across the country, production remained below average. Seasonal improvements in food security are therefore unlikely to last long, as households are expected to deplete their food stocks early in 2018, placing the most vulnerable at heightened risk of food insecurity

from February onwards (FEWS NET 12/2017). January also marked the beginning of the 2018 lean season, which is three months earlier than usual (USAID 17/01/2018).

Armyworm continues to affect crops, which limits their yield and negatively impacts food production across all states, but particularly in Northern Bahr el Ghazal and Eastern and Central Equatoria. Foot-and-Mouth Disease is threatening livestock in a number of localities across the country (FAO 23/01/2018; 12/2017; 10/2017). Given the reliance of some households on livestock for livelihoods, this risks worsening food insecurity.

Food access

Physical

Widespread insecurity and displacement regularly hamper access to markets and disrupt livelihood activities. Parties to the conflict are also accused of using food as a weapon of war, by deliberately preventing civilians from accessing food. As well as targeting humanitarian aid agencies, both government forces and non-state armed groups are reported to steal food from civilians and deny access to fields (Deutsche Welle 06/11/2018; The Guardian 10/01/2018). Humanitarian access incidents include the looting of food supplies by government and non-state armed actors, most recently in December when 2.3 metric tons of food was looted from a humanitarian warehouse (OCHA 18/01/2018; 07/12/2017; FEWS NET 12/2017; Deutsche Welle 06/11/2018). An increasingly difficult operating environment is preventing aid organisations from pre-positioning supplies throughout the ongoing dry season (UN Security Council 24/01/2018; FEWS NET 12/2017). In the rainy season, poor road conditions limit both humanitarian access and trade, impacting on food security.

In addition, high travel costs impact trade and limit the availability of food stocks in local markets. Fuel scarcity is further complicating the delivery of goods. Trade flows remain limited or non-existent across parts of Greater Equatoria, including key supply routes in to Juba. Markets in parts of central Unity and in Raja in Western Bahr el Ghazal have minimal or no supplies (FAO 01/2018).

Economic factors

Economic conditions further deteriorated over the past year. Hyperinflation continues to drive depreciation of the South Sudanese pound, which in turn sustains high food prices. Although the price of staple crops declined by around 10% following harvests, prices in early 2018 remain more than double those of 2017 (FAO 01/2018). Food prices are expected to increase again from January and throughout the lean season, and reach higher levels than in 2017, which will further reduce households' purchasing power (FEWS NET 12/2017; USAID 06/11/2017). As a result of poor food access, households have resorted to negative coping mechanisms, such as reducing frequency of meals,

depleting savings to meet basic needs, or resorting to eating unhealthy wild plants (FEWS NET 12/2017; USAID 06/11/2017).

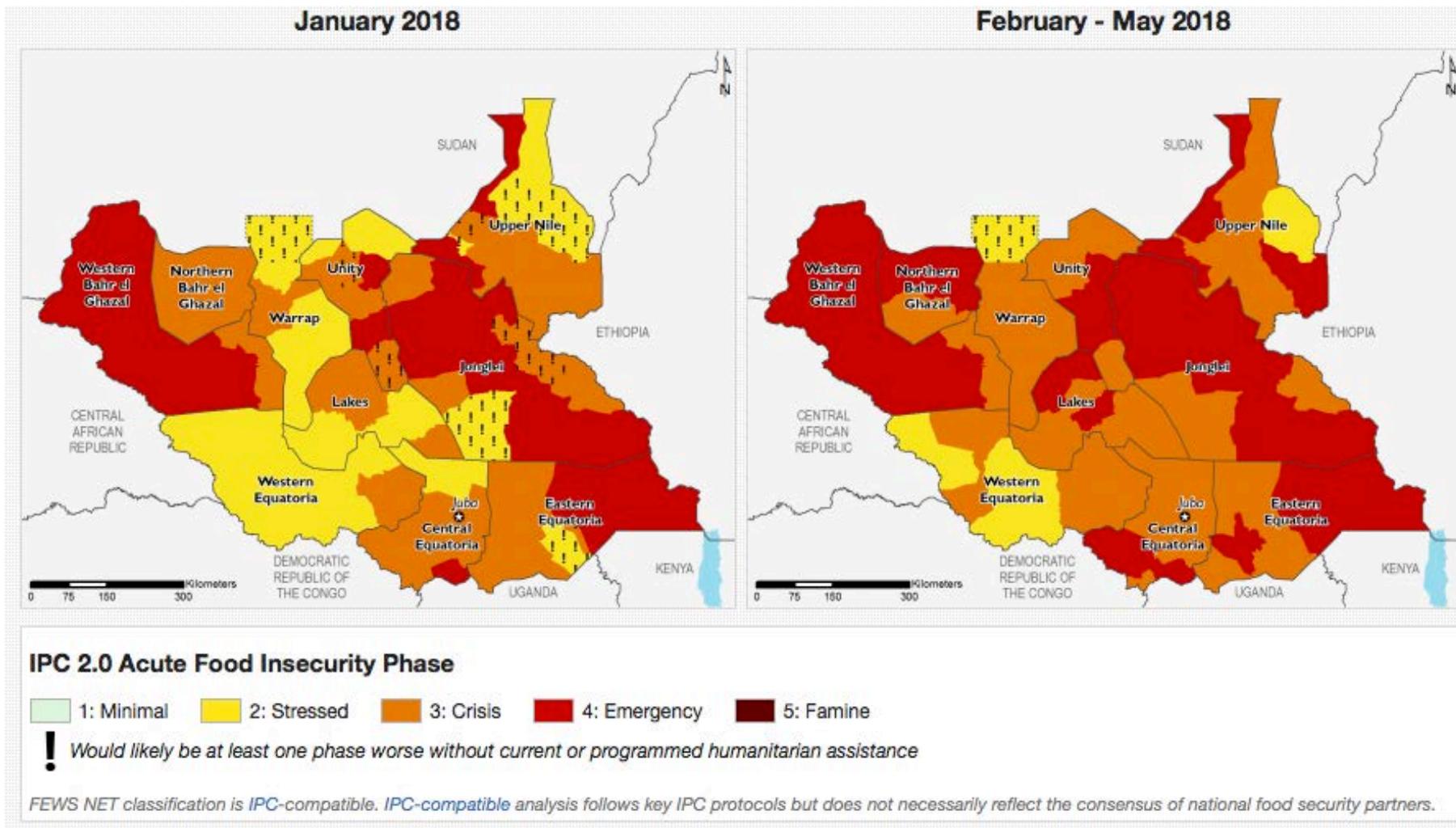
Outlook

Food insecurity is expected to be worse in 2018 than in 2017. Over five million people will need emergency assistance between January and March, a 4% increase compared to the same time in 2017. A higher number of people will likely be in IPC Phase 4 compared to last year. As food stocks will in most cases be consumed by late January, prices will begin to rise and persist at high levels. Consequently many households will have record low purchasing power (FEWS NET 12/2017; OCHA 07/12/2018). Many areas across the country currently in IPC Phase 3 are expected to fall to IPC Phase 4 between February and May. This includes significant parts of Greater Upper Nile, as well as Aweil counties in Northern Bahr el Ghazal, Rumbek counties in Lakes, Yei and Morobo in Central Equatoria, and Torit in Eastern Equatoria (FEWS NET 12/2017). Other areas currently IPC Phase 2 are projected to deteriorate into IPC Phase 3 including Ezo in Western Equatoria, Budi in Eastern Equatoria, most counties within Lakes and Warrap, and the northern counties of Upper Nile (FEWS NET 12/2017).

If current levels of humanitarian assistance are not maintained or scaled up, and conflict, weather shocks and economic instability persist, pockets of IPC Phase 5 are likely to occur in multiple locations (FAO 01/2018). Greater Baggari, in Western Bahr el Ghazal is of particular concern because assistance has been extremely limited since 2016, and nutrition assessments between August and September revealed GAM rates as high as 38%. Some populations are already likely to be in IPC Phase 5 in Leer (Unity), and in Nyirol and Ayod (both in Jonglei) due to the prevalence of conflict and limited humanitarian access in these areas (USAID 17/01/2018; FAO 01/2018; FEWS NET 12/2017).

A significant reduction of violence has the potential to improve food security. However, considering that the Cessation of Hostilities agreement implemented on 24 December has been repeatedly broken, and neither the government nor the opposition demonstrate willingness to end the conflict, it is unlikely that violence and displacement will decrease (UN Security Council 24/01/2018).

Current and projected food insecurity, South Sudan



Source: FEWS NET 01/2018

Yemen

Overview

Some 17.8 million people – 61% of Yemen's population – were food insecure (IPC Phase 3 or worse) by the end of 2017, compared to 17 million at the end of 2016 (HNO 04/12/2017, HNO 23/11/2016). Moreover, 8.4 million people were in IPC Phase 4 or worse at the end of 2017, compared to 6.8 million the year before – an increase of 24% (HNO 04/12/2017). As the food security situation worsens, there is a risk of localised IPC Phase 5 in the worst affected areas, including Taizz, Amran, Hajjah, Hodeidah, Sada'a, and Sanaa, if imports and humanitarian aid remain restricted. (FAO 07/12/2017, FEWS NET 14/11/2017; IPC 01/03/2017).

Saudi Arabia and its allies have restricted travel to Yemen by air, land, and sea since 2015 to prevent arms from reaching Houthi forces. In November 2017, the Saudi-led coalition tightened its naval blockade in response to a Houthi missile attack, temporarily halting all commercial and humanitarian access for two weeks (Reuters 11/10/2017). The blockade has delayed humanitarian supplies and prevented food and fuel from entering the country, impacting heavily the situation in Yemen given that it imports 80% of its food needs (FAO 04/01/2018). Although the blockade was partially lifted in December and there have been recent indications that Saudi Arabia could allow more aid into the country, humanitarian actors continue to stress a lack of access to those in need of assistance and a deteriorating food security situation (ADRA, 23/01/2018, UN 30/12/2017).

A weak Yemeni rial has increased the costs of food, fuel and agricultural inputs. The central bank has been in crisis since it was transferred from Houthi-controlled Sana'a to the temporary capital of Aden in September 2016. Meanwhile, Houthis kept its counterpart functioning in Sana'a creating a competing system (ICG 29/09/2017). Both banks suffer from depleted cash reserves and are unable to foreign currency exchange constraints (Washington Post 16/01/2018, Reuters 15/08/2017, FEWS NET 07/2017). Coupled with the collapse of the Yemeni economy, the cash liquidity crisis has left the government unable to pay most public salaries especially in Houthi-areas since August 2016. This has affected the livelihoods of some 30% of the population who work in the public sector (Washington Post 16/01/2018, WFP 30/09/2017). In the private sector, enterprises have on average reduced operating hours by 50%, and an estimated 55% of the workforce have been laid off, further impacting on livelihoods (HNO 04/12/2017).

Conflict has decreased crop, livestock, and fish production and supply to local markets (FAO 07/12/2017). The agriculture and fishery sectors employed more than 54% of the rural workforce and were the main source of income for 73% of the population before the escalation of conflict (HNO 04/12/2017). Shocks to these sectors have had a major impact on livelihoods, and correspondingly drive food insecurity.

In addition to food insecurity, Yemen is affected by nutrition and health crises. Some 1.8 million children and 1.1 million pregnant or lactating women are currently acutely malnourished, including an estimated 400,000 children under age of five who are

suffering from severe acute malnutrition (HNO 04/12/2017). The number of suspected cholera cases reached one million by the end of 2017 including more than 2,200 associated deaths (Al Jazeera 21/12/2017). Around one third were children under five (UNICEF 01/11/2017). Almost 800 diphtheria cases were also reported as of 24 January, particularly among children (ECHO 24/01/2018). The combination food insecurity, malnutrition and disease outbreaks is driving needs for multi-sectoral assistance.

Food availability

Production

On average, total domestic cereal production covers less than 20% of the Yemen's total food requirements (GIEWS 28/11/2017). Cereal production in 2017 was estimated to be 335,000 metric tons, 8% below 2016 levels and about half of the five-year average (GIEWS 28/11/2017). Water scarcity, a delayed rainy season, and less than expected rainfall have challenged agricultural production, while high fuel prices have sharply increased water trucking costs for farmers, limiting their ability to maintain crops (FAO 07/12/2017). Additionally, agricultural inputs are in short supply and expensive, including seeds, fertiliser, and pesticides, impacting on production (FAO 12/04/2017). Inflation in the dollar exchange rate has sharply increased prices of livestock-related inputs (vaccines, live animals, poultry and animal feed), forcing farmers to suspend production (FAO 07/12/2017).

Imports

The de facto blockade on the movement of goods in and out of Yemen, as well as fighting in port areas, such as Taizz and al Hodeidah, have heavily constrained imports, which normally provide for 80% of food supply (FAO 04/01/2018, GIEWS 28/11/2017). Between January and September 2017, about 2.78 million metric tons of wheat and wheat flour were imported, short of the 4.3 million metric tons needed to guarantee a sufficient calorie intake for the population (FSIS-FSTS 15/11/2017). Lack of credit and continued depreciation of the currency have also seriously affected the country's imports (GIEWS 28/11/2017).

In addition to coastal areas, conflict and the blockade have affected food supply chains and markets inland, particularly in the north-west and central-west of the country, which are supplied primarily by Hodeidah port (Critical Threats 11/12/2017, OCHA 13/11/2017, REACH 18/12/2017). The south west of the country is supplied by the port of Aden, which has also been affected by insecurity (REACH 18/12/2017).

The blockade has delayed or prevented essential humanitarian supplies, including food, medicine and fuel, from entering the country. Half of the seven million people receiving food assistance from WFP are limited to 60% normal rations because of import challenges and lack of resources (Washington Post 01/01/2018). Acute food insecurity is expected to deteriorate further without more emergency food and livelihood assistance

programs, which is unlikely unless more access is granted through the ports (FAO 30/11/2017).

Food access

Physical

Access to shops, food reserves and humanitarian assistance has been limited by fighting and shelling especially in conflict-affected governorates of Sanaa, Hodeidah, Hajjah, Al Jawf, Marib, Saada and Taizz (OCHA 04/12/2017, USAID 22/09/2017). Fishing in coastal areas of Hajjah, Taizz and southern Hodeidah governorate has stopped due to destruction of the assets and landing sites (FAO 20/12/2017). Access limitations are particularly problematic, given around 70% of Yemenis have no food stocks and buy food daily from the markets where possible. (OCHA 11/11/2017).

Damaged key infrastructure including roads and storage facilities, high transport costs following the increased fuel prices, and limited access to markets because of ongoing conflict pose additional challenges for vendors across the country (WFP 19/11/2017).

Almost two million IDPs, 88% of whom have been displaced for more than a year, are in a particularly vulnerable position due to their limited access to livelihood possibilities and exposure to high rental costs. Conflict has also impacted the livelihoods of 1.7 million rural households engaged in crop and livestock production, limiting purchasing power for basic necessities including food. (HNO 04/12/2017).

Economic factors

Domestic food prices are high and have been increasing, exacerbated by conflict, the blockade, and the unstable economic situation in the country (FAO 20/12/2017). The average cost of the monthly minimum food basket in November 2017 was 41% higher than it was before the crisis (WFP 19/11/2017). Prices of imported commodities have increased by 77% for diesel, 83% for petrol, 34% for wheat, 39% for wheat flour, 99% for rice, 59% for cooking oil and 46% for sugar when compared to pre-crisis prices (FAO 10/12/2017).

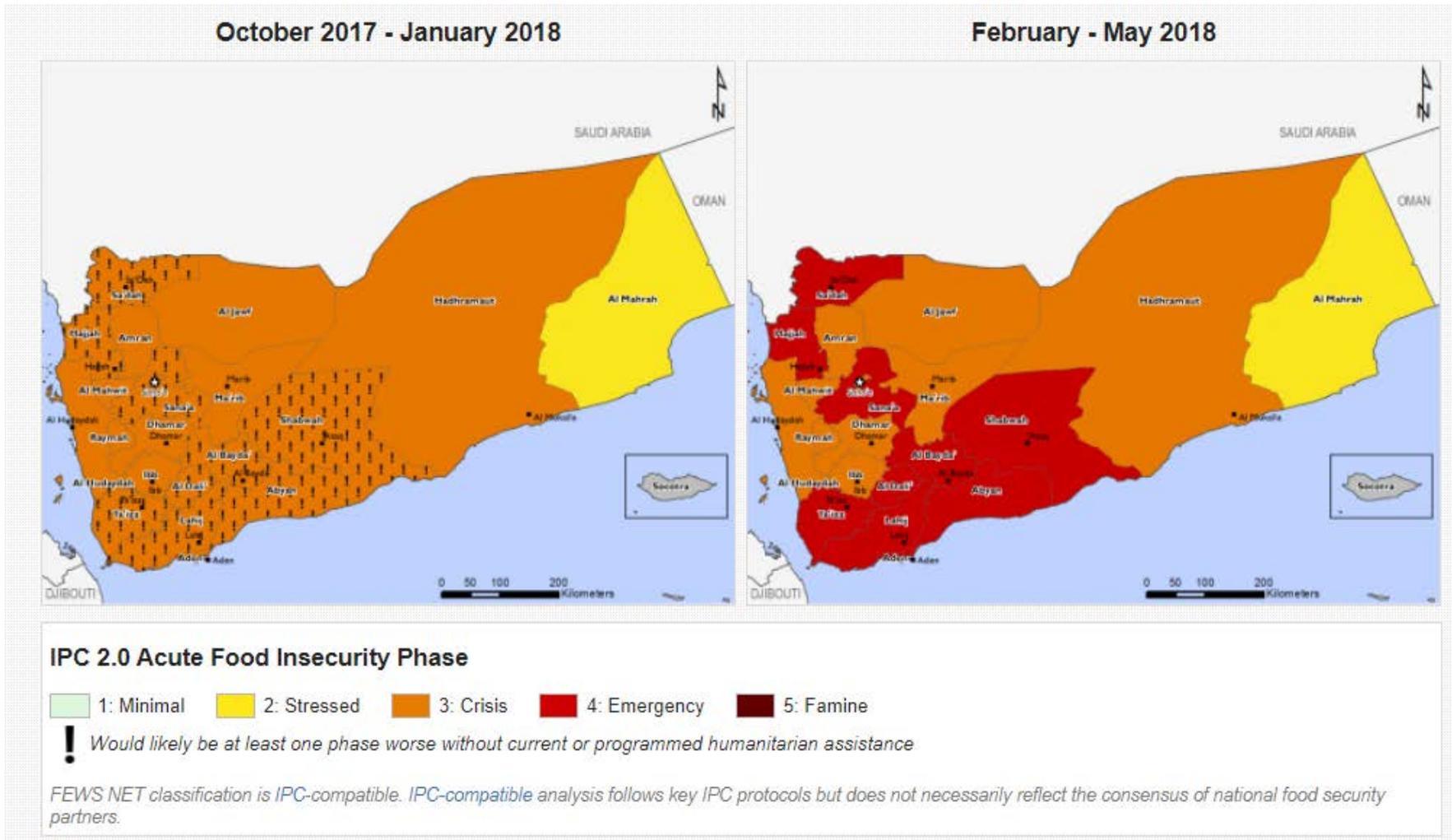
Reduced operating hours and private sector layoffs, coupled with unpaid salaries for some 30% of the population in public sector employment, have decreased purchasing power. The loss of livelihoods coupled with price increases and aggravating socioeconomic conditions have negatively impacted food access (HNO 04/12/2017; Critical Threats 15/11/2017; WFP 30/09/2017).

Outlook

With all parties lacking commitment to peace negotiations, the political stalemate is likely to continue to drive conflict and heavily impact on food security, livelihoods and nutrition. Moreover, beyond food security, ongoing health and nutrition crises and a lack of access to medicine, water and sanitation, are expected to aggravate humanitarian needs.

Unless access improves dramatically, food insecurity is likely to get worse, and most conflict affected areas, particularly the south and west coast, are likely to fall into IPC Phase 5. The Food Security and Agriculture Cluster (FSAC) estimate that more than 10.4 million people are likely to be in IPC Phase 4 or worse in the first half of 2018 if access restrictions continue (FAO 04/01/2018). Some areas may move into IPC Phase 5 as the worst-affected households begin to exhaust their coping capacity after almost three years of conflict (FEWS NET 14/11/2017).

Current and projected food insecurity, Yemen



Source: FEWS NET 10/2017