YEMEN
FOOD SECURITY
& AGRICULTURE CLUSTER

EVOLVING REGIONAL AND COUNTRY DYNAMICS

IMPLICATIONS FOR FOOD SECURITY OUTLOOK, RESPONSE PRIORITIZATION, SCALE AND DELIVERY

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This paper assesses how evolving regional and in-country dynamics are affecting the key 2026 response planning assumptions and what this means for the projected food security outlook, response prioritization, delivery feasibility, and modality choices across Yemen.

1. EXECUTIVE SUMMARY

- **Yemen's food security outlook is deteriorating not only because needs are rising, but due to systemic erosion of the enabling condition required to prevent further decline.** Humanitarian access, funding, household purchasing power, fuel availability, market functionality, and livelihoods are weakening concurrently constraining both response delivery and impact. Without restored operational space, predictable and flexible financing, and context-specific response modalities, the risk of localized catastrophic outcomes will intensify.

- **Displacement and climatic shocks are compounding needs**. Approximately 10,000 households were displaced by the first wave of floods in Q1 2026, while localized conflict continues to drive cyclical displacement and pressure on already overstretched services. The upcoming flooding season, expected to begin in August, is likely to have more severe impacts in the absence of a timely humanitarian response, particularly in SBA-controlled areas.

- **Macroeconomic indicators are increasingly disconnected from household realities**. Although the IRG exchange rate appreciated by approximately 50 percent year-on-year in March 2026, these gains have only partly reduced food prices and have not improved food access; high fuel and transport costs, trader behavior, and import costs continue to limit price transmission, with some food prices (e.g. vegetable oil) rising in April. Nominal exchange rate stability in SBA areas continues to mask severe liquidity shortages, sanctions-related pressures, banking constraints, and declining purchasing power.

- **Global price pressures are compounding domestic constraints**. Elevated food and energy prices for a second consecutive month continue to transmit into Yemen's markets, with cereals, vegetable oil, transport, and fuel costs exerting sustained upward pressure on the Minimum Food Basket.

- **Fuel has become a binding system constraint.** Fuel import volumes have contracted sharply, while imported gasoline and diesel prices increased in IRG by approximately 28 percent and 9 percent respectively, driving higher transport, milling, irrigation, service delivery, and food costs.

- **Food import patterns are being reconfigured.** Food imports via IRG ports in Q1 2026 are 15 percent lower compared to Q1 2025, whilst they are 47 percent higher via Red Sea Ports during the same period, due to a relative period of de-escalation enabled traders to increase imports through northern ports in order to build stocks, hedge against potential future disruptions, and prepare for higher seasonal demand, particularly during Ramadan. Reduced inflows through southern markets and a shift toward northern ports are creating geographic supply imbalances, increasing inland transport costs, and heightening the risk of localized shortages.

- **Livelihood collapse is accelerating structural vulnerability**. Reduced income opportunities, declining remittances, input price inflation, and financial fragmentation are removing critical coping mechanisms and increasing dependence on humanitarian assistance. In tandem, humanitarian reach is contracting amidst increasing humanitarian needs. Commensurate with available funding, approximately 1.7 million people (57 percent) of the targeted 3 million hyper prioritized people will receive humanitarian food security assistance (HFSA) in IRG areas. Only 0.6 million people (15 percent) of the targeted 3.9 million people in SBA areas will be supported by HFSA, if the significant access, funding, and operational conditions constraints persist. For emergency livelihood assistance, 0.26 million people (60 percent of the 0.44 million targeted) will be reached in IRG areas, while 0.1 million people (12 percent of the 0.83 million targeted) will be reached in SBA areas by mid-June.

2. CONFLICT, DISPLACEMENT AND HUMANITARIAN ACCESS

KEY 2026 PLANNING ASSUMPTIONS	CURRENT REALITIES AND OPERATIONAL IMPLICATIONS	TREND AND OPERATIONAL IMPLICATIONS
Military activity expected to persist in Marib, Taiz, and the Western Coast, with renewed skirmishes likely.	**Large-scale escalation remains localized;** however, sustained tensions linked to Red Sea dynamics, southern unrest, and localized insecurity are increasing civilian exposure and operational uncertainty. The risk of rapid escalation remains high.	**Conflict dynamics are increasingly fragmented,** with localized volatility capable of rapidly disrupting trade routes, humanitarian access, and service delivery.
Access constraints expected to increase along frontline districts, hindering humanitarian personnel travel and commodity flow. ACAPS highlights that Yemen remains one of the most operationally constrained humanitarian environments globally, with severe and persistent barriers to access.	**Access in northern areas has sharply worsened** leading to UN pause measures, due to heightened operational risks, administrative restrictions, detentions, and bureaucratic impediments. These constraints, together with disruption to air operations in the north, including the suspension of UNHAS services in Yemen are materially reducing humanitarian reach, partner confidence, monitoring capacity, and operational footprint.	**Significant deterioration.** Constraints have exceeded planning assumptions and are now a primary determinant of response feasibility.
New internal displacement is expected to increase in active frontline districts including Marib, Al Jawf, Al Dhale, Al Hudaydah, Hajjah, and Taiz.	**Population movements continue due to localized conflict and climate shocks, particularly floods.** Approximately 10,000 households were displaced by floods by April 2026, with damage to crops, farmland, irrigation systems, and livestock disrupting seasonal agricultural activity. Seasonal flooding during August-Sep may trigger additional displacements and damages.	**Broadly aligned but intensifying.** Displacement is increasingly cyclical and shock-driven, placing additional pressure on IDP sites, services, livelihoods, and local markets.

Forward outlook: Continued access restrictions in SBA areas, sustained displacement, and disruption to trade corridors will progressively erode humanitarian reach, particularly in frontline and flood-affected areas. This trajectory risks:

- Further contraction of partner operational presence in high-severity locations.
- Reduced frequency and scale of assistance delivery.
- Deepening vulnerability among displaced and hard-to-reach populations.

3. MACROECONOMIC DYNAMICS AND FOOD ACCESS RISKS

***Key Planning Assumptions**: Persistently low foreign exchange reserves, constrained humanitarian inflows, and disrupted oil exports are expected to sustain pressure on the IRG Rial, while nominal stability in SBA areas masks underlying liquidity stress and declining real purchasing power.*

Operational Bottom Line: Macroeconomic indicators provide a misleading signal of stability, masking a deepening affordability crisis at the household level. Price transmission remains incomplete, with fuel costs, import dynamics, and trader behavior sustaining upward pressure on food prices.

DYNAMICS OBSERVED IN IRG AREAS	DYNAMICS OBSERVED IN SBA AREAS	TREND AND OPERATIONAL IMPLICATIONS
Fragile currency appreciations: Appreciation of the IRG Rial in March 2026—approximately 50 percent year-on-year—remains highly fragile due to halted crude oil exports, limited reserves, reduced inflows, and exposure to external shocks.	**Artificial exchange rate stability:** Nominal exchange rate stability continues to mask severe liquidity shortages, sanctions-related pressures, banking constraints, and declining real purchasing power.	**Unsustainable stabilization.** Macro indicators are vulnerable to reversal and do not reflect household-level affordability.
Incomplete prices pass through: Exchange rate gains have only partially transmitted into lower food prices. Fuel costs, freight charges, trader behavior, and import costs are limiting price pass-through; some commodities, including vegetable oil, resumed upward movement in April.	**Suppressed but rising prices:** Administrative controls suppress official price movements but do not eliminate shortages, parallel market distortions, or effective price increases faced by households. Vegetable oil prices also significantly rose in SBA, up by 13 percent month-on-month.	**Deteriorating food access**. Market conditions are increasingly disconnected from household realities.
Heightened depreciation risks: Red Sea disruptions, declining aid inflows, and weak foreign exchange reserves increase the risk of renewed currency depreciation and inflation.	**Liquidity driven affordability constraints:** Persistent cash shortages constrain household purchasing power and limit the practical usability of cash-based assistance.	**Response modality risks.** Liquidity constraints and price distortions may reduce cash assistance's effectiveness unless carefully adapted. Continued regional tensions and disrupting supply chains are driving up the costs of humanitarian lifesaving interventions.

Forward outlook: Current exchange rate dynamics provide a misleading signal of stability and are unlikely to translate into improved food access without sustained inflows and market confidence. Across both contexts, the combined effect, including limited price transmission, persistent liquidity constraints, and raising costs, is a progressive deterioration in food affordability and access. This trajectory is expected to:

- Further constrain the effectiveness of cash-based interventions.
- Increase reliance on in-kind and hybrid assistance modalities.
- Deepen vulnerability among market-dependent populations, particularly those with limited income and access to financial systems.

4. FUEL, LOGISTICS, AND MARKET SYSTEM STRESS

***Key Planning Assumptions**:*
Fuel imports are expected to remain severely constrained due to Red Sea insecurity, port limitations, and financing gaps, driving sustained increases in transport, food, and operational costs across all sectors.

IRG: Fuel prices remain highly exposed to exchange rate volatility, import disruptions, and global oil market dynamics.

SBA: Administrative price controls may stabilize official rates, but underlying supply constraints will continue to drive parallel market distortions and access challenges.

Operational Bottom Line: Fuel import volumes have declined sharply, while prices have increased significantly. Fuel constraints are simultaneously undermining market functionality and humanitarian reach, reducing the scale, frequency, and geographic coverage of assistance.

DYNAMICS IN IRG PORTS / MARKETS	DYNAMICS IN SBA PORTS / MARKETS	TREND / OPERATIONAL IMPLICATION
Import contraction: Aden/Mukalla handled only 113,000 MT (Jan–Mar 2026), reflecting a 31 percent contraction in import volumes compared to same period last year, reflecting a major contraction	**Supply Constraints:** Al Hudaydah, As Salif, and Ras Issa received only196,000 MT (Jan-Feb 2026), a steep drop from 816,000 MT in Q1-2025. Red Sea disruptions, port access constraints, and administrative controls	**Pipeline compression**. Fuel supply chains are operating at significantly reduced capacity, increasing the risk of sustained shortages across both areas.

and constraining fuel availability in southern markets.	continue to tighten supply.	
Fuel cost escalation pressure: Imported gasoline increased by approximately 25 percent and imported diesel by approximately 24.1 percent, with refined gasoline also increasing. These increases are raising transport, milling, irrigation, and delivery costs.	**Artificial fuel price stability with access constraints:** Official price stability is maintained through administrative controls, but queues for fuel and cooking gas point to tightening supply and reduced effective access.	**Cost escalation**. Fuel price and availability constraints are directly transmitted into food prices, service delivery costs, and humanitarian logistics.
High exposure to external price shocks: Fuel price volatility remains highly exposed to exchange rate movements, import disruptions, and global oil market dynamics.	**Distorted fuel market under administrative controls**: Administrative price controls may delay official price adjustments but are unlikely to prevent parallel market distortions or access constraints.	**Market disruption**. Fuel constraints are weakening market functionality and reducing the feasibility, frequency, and scale of assistance delivery.

Forward outlook: Fuel supply constraints are emerging as a critical binding constraint across the humanitarian response and broader economy. Prolonged fuel shortages will directly undermine both market functionality and humanitarian access, reducing the scale, frequency, and geographic reach of assistance. Fuel price volatility is no longer a secondary economic factor—it is a primary driver of both food insecurity outcomes and humanitarian response feasibility.

Fuel import volumes have contracted sharply to multi-year lows, with current levels representing roughly one-third of early 2025 volumes. This trajectory is expected to:

- Sustain upward pressure on food prices and the cost of the minimum expenditure basket.
- Increase humanitarian delivery costs across all sectors, including food assistance, health services, and water supply.
- Disrupt essential services, including milling, water pumping, health facility.

5. FOOD IMPORTS, PRICES AND SUPPLY CHAIN RISKS

***Key Planning Assumptions**: Food imports are expected to remain below seasonal norms due to Red Sea insecurity, elevated freight and insurance costs, port disruptions, and foreign exchange constraints, limiting national supply and increasing market volatility.*

Operational Bottom Line: Food supply chains are undergoing structural reconfiguration, with increasing reliance on northern ports and reduced inflows through southern corridors. Food access constraints are increasingly spatial and structural, not just price driven.

A. GLOBAL DRIVERS: EXTERNAL CONSTRAINT ON BOTH MARKET RECOVERY AND HUMANITARIAN RESPONSE

GLOBAL DRIVERS	IRG AREAS	SBA AREAS	TREND / OPERATIONAL IMPLICATIONS
Elevated global food prices remain well above baseline, with continued monthly increases reported in March 2026.	**Direct price transmission**: Global price increases transmit more directly into domestic markets due to exchange rate exposure and weaker price controls.	**Delayed / distorted price transmission:** Administrative controls may temporarily suppress official prices but cannot eliminate supply shortages or effective price increases.	**Sustained inflationary pressure** will continue to raise food costs and limit household purchasing power.
Energy-driven inflation is affecting cereals, vegetable oil, transport, and import costs.	**Exchange rate-driven inflation amplifications:** Fuel price increases and exchange rate fragility amplifies food price inflation.	**Suppressed but rising real prices:** Fuel constraints, parallel markets, and reduced availability raise real prices even when official rates appear stable.	**Food price increases are outpacing incomes** and reducing affordability across both contexts.
Tight global supply conditions and heightened market uncertainty continue to affect procurement, freight, insurance, and import predictability.	**Cost exposure to global shocks:** Minimum Food Basket costs remain exposed to freight, fuel, and exchange rate pressure.	**Artificial price stability risk:** Local food price stability is unlikely to hold under sustained supply pressure.	**Divergence between official and real prices** undermines market transparency and cash programming assumptions.

Forward outlook: Across both IRG and SBA areas, global price dynamics are no longer a contextual factor—they are a binding constraint on both market recovery and humanitarian response effectiveness. Global food price pressures are expected to remain elevated and volatile, with limited scope for domestic mitigation. Transmission into Yemen markets will continue to:

- Sustain upward pressure on food prices and the Minimum Food Basket
- Accelerate erosion of household purchasing power
- Reinforce existing domestic constraints (fuel, FX, supply chains)

B. FOOD IMPORTS AND LOCAL FOOD PRICES: SUPPLY RECONFIGURATION AND EMERGING CONSTRAINTS

DYNAMICS OBSERVED IN IRG	DYNAMICS OBSERVED IN SBA	TREND/OPERATIONAL IMPLICATIONS
Sharp contraction in supply flows: Food imports through Aden and Mukalla ports were 15 percent lower compared to Q1 2025, yet 40 percent higher than in Q1 2024. During Q1 2025, ports along the Gulf of Aden compensated for infrastructure damage and active conflict affecting northern ports.	**Northern supply surge:** Following the ceasefire, port operations in the north northern ports, including Hodeidah, As Salif, and Ras Issa improved significantly, with food imports through Red Sea ports increasing by 47 percent compared to Q1 last year.	**Supply reconfiguration**. National food supply is becoming uneven, with geographic imbalances between northern and southern markets.
Reduced market availability in southern areas increases exposure to inland transport costs, delays, and localized supply gaps.	**Concentration risk:** Greater dependence on northern ports exposes supply chains to localized disruption, access constraints, and administrative bottlenecks.	**Inland trade pressure**. Over-reliance on overland routes is increasing costs, delivery delays, and risks to consistent supply flows.
Emerging Price Pressures: While MFB costs remained relatively stable in March in some areas, imported commodities such as vegetable oil began showing renewed upward pressure in April.	**Distorted price signals**: Administrative controls distort price signals and may delay visible price adjustments despite underlying shortages.	**Market stress signals**. Yemen imports wheat primarily in grain form and relies on locally operated, fuel-powered flour mills for processing. Rising fuel prices will drive up milling and transportation costs, leading to higher food prices. This will further undermine household food security in an already constrained and highly complex operating environment.

Forward outlook: Food import disruptions are now a critical constraint on national food availability, extending beyond price increases to physical access and supply stability. Sustained Red Sea insecurity, elevated war-risk premiums (~US$3,000/container), and reduced vessel arrivals are expected to:

- Sustain upward pressure on food prices and the Minimum Food Basket.
- Accelerate erosion of household purchasing power.
- Reinforce existing domestic constraints (fuel, FX, supply chains).
- Limit import volumes and increase supply volatility nationwide.
- Create localized supply gaps, particularly in southern and hard-to-reach areas.

Compounding pressures from fuel costs, exchange rate volatility, and inland transport constraints will further weaken market functionality and reduce household purchasing power. **Concurrently, rising costs and reduced availability of agricultural inputs (including fertilizers) risk undermining the upcoming production season, with medium-term implications for domestic supply.**

6. HOUSEHOLD INCOME AND PURCHASING POWER

Key Planning Assumptions *Livelihood opportunities are expected to remain constrained amid economic disruption and weak private sector activity. Financial sector fragmentation—driven by sanctions compliance, de-risking, and FTO designation—will likely increase transaction costs and reduce the accessibility and predictability of remittance flows for vulnerable households.*

Operational Bottom Line: Purchasing power collapse is a central driver of food insecurity outcomes. Income contraction, reduced remittances, financial system fragmentation, and rising costs are converging to reduce households' ability to meet basic needs. Without restoration of livelihoods and financial flows, food insecurity will continue to deepen irrespective of market supply conditions.

KEY DRIVERS PLANNING ASSUMPTIONS	DYNAMICS OBSERVED IN RG & SBA AREAS	TREND / OPERATIONAL IMPLICATIONS
Livelihood disruption: Reduced humanitarian presence and weak private sector activity are constraining employment opportunities.	**Severe livelihood strain:** Limited job opportunities and declining economic activity are reducing household income sources across both areas.	**Income contraction.** Households are experiencing sustained income losses, reducing their capacity to absorb price shocks.

Shock exposure: Flooding, fuel disruptions, and market instability continue to affect income-generating activities.	**Compounding shocks**: Recurrent climatic and economic shocks are further eroding already fragile livelihoods.	**Reduced resilience**. Recurrent shocks are eroding coping capacity and increasing vulnerability to food consumption gaps.
Financial system constraints: Banking fragmentation, sanctions compliance, and transfer disruptions.	**Restricted financial access:** Higher transaction costs and limited access to formal channels are constraining financial flows.	**Household liquidity stress.** Limited access to cash constraints purchasing power and market participation.
Remittance disruptions: Reduced and unreliable inflows due to financial restrictions.	**Declining remittance access:** Many households face reduced or inconsistent remittance flows.	**Loss of safety nets**. Reduced remittances remove a critical coping mechanism for vulnerable households.
Rising cost of living: Food, fuel, and transport costs continue to increase.	**Stagnant wages vs rising costs:** Incomes are not keeping pace with inflationary pressures.	**Affordability collapse**. Households are increasingly unable to meet minimum food and basic needs.

Forward outlook: Household purchasing power is expected to continue deteriorating under the combined effects of income contraction, rising costs, and constrained financial flows.

The convergence of reduced income and rising costs is accelerating a structural decline in affordability across both IRG and SBA areas. Unless there is a meaningful recovery in livelihoods, stabilization of remittance channels, and easing of market pressures, the current trajectory will:

- Furthermore, reduce household ability to meet basic needs.
- Increase reliance on negative coping strategies.
- Drive greater dependence on humanitarian assistance.

7. HUMANITARIAN ASSISTANCE TRENDS AND RESPONSE CONSTRAINTS

Key Planning Assumptions. *Humanitarian assistance is expected to become increasingly constrained in SBA with similar levels to quarter 4 of 2025 in IRG, with funding gaps and access limitations reducing coverage, predictability, and overall response effectiveness.*

Operational Bottom Line: The system is no longer scaling to match severity, particularly in access-constrained areas. The current response model is structurally misaligned with the operating environment and cannot meet needs without a fundamental shift in delivery approach and operational access.

IRG AREAS (DECLINING COVERAGE)	SBA AREAS (SEVERE CONSTRAINTS)	TREND AND OPERATIONAL IMPLICATIONS
Contracting reach despite good operational access; Humanitarian food assistance (HFA) continues, expected to reach approximately 1.7 million (IPC Phase 3+ population in IPC Phase 4 districts) compared to 3.4 million in 2025 individuals in IRG areas (IPC Phase 3+ population across all districts).	**Collapse of operational access:** HFA delivery has sharply contracted due to the UN pause in SBA areas, from approximately 2.6 million people reached in 2025 to around 129,000 in 2026, reflecting severe access and operational constraints.	**Rapid response contraction**. Coverage is declining across both contexts, due to a combination of fund cuts and operational space challenges.
Shrinking resilience support: Emergency Livelihood Assistance declined moderately in IRG areas, reducing opportunities to stabilize incomes.	**Near total disruption of resilience programming:** ELA reached only around 7,000 individuals in SBA areas in January–April 2026 compared with approximately 25,000 in 2025.	**Erosion of resilience gains.** Reduced ELA increases dependence on emergency food assistance and weakens recovery pathways.
Constrained but sustained delivery: Partial operational continuity remains possible in accessible areas, but the response footprint is increasingly concentrated and unable to fully match severity.	**Severely restricted delivery environment:** Delivery is severely disrupted by access limitations, operational suspensions, administrative impediments, data restrictions, and reduced operational space.	**Uneven delivery footprint**. Assistance is increasingly concentrated in accessible areas, leaving high-severity and hard-to-reach locations underserved.

Funding shortfalls reducing response scale: Declining funding levels are limiting the ability to sustain and expand assistance in IRG areas despite relatively good operational access.	**Severe funding-access compounding effect:** In SBA areas, funding reductions are compounded by operational constraints, further reducing the feasibility of delivering assistance where needs are highest.	**Country-wide response contraction.** Reduced funding, combined with access constraints, is driving a sharp contraction in coverage, limiting both emergency response and recovery programming across the country. With only 4.4% funding received in Q1 2026, the FSAC response cannot be sustained at scale.

Forward outlook: Without a significant improvement in funding and operating conditions, the gap between needs and reach will widen further through mid-2026. The huge resource gap leaves millions vulnerable to life-threatening malnutrition and increases the immediate probability of districts sliding from Emergency (IPC Phase 4) into Catastrophe (IPC Phase 5).

- Current response trajectories are insufficient to meet the scale and nature of need. By mid-2026, up to 85 percent of acutely food insecure people residing in IPC Phase 4 districts in SBA areas are projected to remain unreached. Continuation of humanitarian food assistance beyond June 2026 is subject to funding availability. The decline in resources extends beyond direct food aid to critical resilience-building efforts, further trapping households in a cycle of dependency. A sharp reduction in Emergency Livelihood Assistance (ELA) will negatively affect the ability of rural households to sustain income or produce their own food, forcing them to adopt extreme and harmful coping mechanisms
- With the 2026 response less than 10 percent funded and other economic situations deteriorating, the erosion of household purchasing power is now outstripping the available humanitarian safety net, threatening to turn a protracted crisis into a large-scale extreme food insecurity (catastrophe).
- The response will increasingly depend on prioritized, feasibility-informed delivery rather than broad geographic coverage. Operational workarounds may be necessary in the short term, but they cannot substitute a principled, predictable, and scalable access framework in the longer term.

8. STRATEGIC CONCLUSIONS AND KEY RECOMMENDATIONS

STRATEGIC CONCLUSION	RECOMMENDED ACTION
1. Operational space in northern areas is a decisive constraint. Access restrictions, data limitations, and administrative barriers are significantly reducing the scale, credibility, and effectiveness of humanitarian response. Without minimum operating conditions, delivery will remain fragmented, reliant on sub-optimal workarounds, and unable to match severity levels.	**Secure a minimum operational envelope for principled and scalable response:** Advocate for a time-bound, conditions-based humanitarian access framework prioritizing the most food insecure locations and life-saving services; negotiate minimum guarantees on movement, non-interference, staff safety, monitoring, data collection, and fuel access; and position humanitarian access as a system stabilizer that mitigates catastrophic outcomes, displacement, and market disruption.
2. Purchasing power is a primary driver of food insecurity. Food insecurity is no longer only a question of food availability in local markets; it is increasingly driven by collapsing household affordability, declining income, exhaustion of coping strategies and limited liquidity.	**Align response modalities with affordability and liquidity**: Scale cash where markets' function and liquidity are sufficient; expand hybrid assistance in price-volatile environments; maintain or expand in-kind assistance where inflation, supply constraints, or liquidity shortages reduce cash effectiveness; and consider vendor-linked vouchers where physical liquidity is low.
3. Fuel and logistics are binding constraints on both market functionality and humanitarian delivery. Fuel shortages and rising transport costs directly affect food prices, irrigation, milling, service delivery, and last-mile assistance.	**Prioritize delivery feasibility:** Concentrate resources in high-severity and operationally feasible districts; optimize on-demand food pipeline and last-mile delivery in SBA areas; strengthen pre-positioning and integrate fuel availability and logistics costs into response planning and targeting decisions.
4. Market functionality is diverging geographically. Supply reconfiguration is driving north–south imbalances, localized market stress, and increased inland transport costs.	**Move away from uniform national assumptions**: Apply area-based programming; use market functionality, supply, price, liquidity, and transport indicators jointly for targeting; and adjust assistance levels governorate-by-governorate to reflect localized variations and supply constraints.
5. Liquidity constraints risk undermining cash programming. Banking restrictions, fragmentation, cash shortages, and transaction costs reduce the real value and usability of cash assistance.	**Make cash programming liquidity-aware:** Assess liquidity conditions before scale-up; use staggered transfers, vendor-linked systems, or hybrid delivery where needed; monitor parallel market dynamics, transfer costs, and trader behavior.

6. **Livelihood collapse is creating structural food security risks**. Income loss, rising input costs, fuel constraints, and repeated shocks are eroding both immediate and future food access.	**Restore and protect livelihoods:** Prioritize productive assets, livestock, agricultural inputs, irrigation, and time-sensitive seasonal support; align food assistance with recovery pathways; and support solar-powered irrigation and livestock feed where diesel costs threaten production continuity.

9. DATA SOURCES AND REFERENCES

Thematic Area	References
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Humanitarian assistance trends	• Yemen FSAC Response Dashboard 2026

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