

# Global Update Food Security Monitoring

June - September 2009 • First issue

# **Highlights**

- The **food security situation in Eritrea, Ethiopia, Kenya and Somalia is acute and deteriorating.** The crop harvest of the main season is about 15 per cent lower than the historical average. This comes on the back of more than three consecutive droughts which have decimated crop production and pasture in most arid and semi-arid areas. The overall situation is further aggravated by growing conflicts. The number of affected people is estimated at more than 20 million.
- Global Acute Malnutrition (GAM) rates are increasing, reaching alarming levels. In some areas of Kenya, they have exceeded 15 per cent and are at about 20 per cent in central Somalia and the Somali Region of Ethiopia. Meanwhile, food consumption and diet diversity are declining in Somalia and Kenya.
- Successive tropical storms in the Philippines, Cambodia, Laos and Vietnam, an earthquake in Indonesia and a tsunami in Samoa have caused significant destructions and population displacement. The death toll is rising.
- In India, Nepal and Pakistan, the number of food insecure people is expected to increase as the performance of summer crops is projected to be substantially lower that average due to late and erratic monsoon rains. Food consumption and diet diversity are declining in Nepal.
- El Niño effects are resulting in drier than normal conditions in parts of Guatemala, Honduras and Nicaragua but could cause wetter conditions in East Africa and parts of South America in the coming months. This could be beneficial unless rains cause flooding, leading to destructions and displacements. In Southern Africa, El Niño may cause drier conditions during the rainy season, which starts in October.
- As a result of the global economic downturn and high food prices, an additional 100 million people suffer from hunger and malnutrition in Asia, the Middle East, Africa and Latin America, The situation is expected to persist through 2010.

# **Monitoring**

- Continuous monitoring of the global economic situation and food prices is required. Furthermore, close monitoring of the situation in East Africa and the effects of El Niño should be given particular attention.
- In the Philippines and Indonesia, assessments will be undertaken to understand the exact impact on lives, livelihoods and food security. The disasters may present a major setback for these countries' economic recovery. Monitoring updates will be presented as they become available.

The Global Update presents the recent food security trends in a number of selected countries where WFP in collaboration with partners monitors the food security situation. The analysis is based on information from existing food security monitoring systems (see table page 5) and other secondary sources (see page 4). The Update is issued on a quarterly basis.

#### Countries covered by the Global Update



Burundi, Eritrea, Ethiopia, Kenya, Rwanda, Somalia, Tanzania, Uganda • Angola, Lesotho, Madagascar, Malawi, Mozambique, Namibia, Swaziland, Zambia, Zimbabwe • Sudan • Benin, Burkina Faso, Central African Republic, Chad, Côte d'Ivoire, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Senegal, Sierra Leone, the Gambia, Togo • Algeria, Egypt, Iraq, OPT, Syria, Yemen . Armenia, Georgia, Kyrgyz Republic, Tajikistan Afghanistan, Bangladesh, India, Nepal, Pakistan, Sri Lanka • Cambodia, Indonesia, Myanmar, the Philippines, DPR Korea • Bolivia, Guatemala, Honduras, Nicaragua, Haiti

# **Africa**

#### **EAST AFRICA**

Burundi, Eritrea, Ethiopia, Kenya, Rwanda, Somalia, Tanzania, Uganda

- The **number of food insecure people in the sub-region is increasing** due to the combined effects of the global economic downturn, high food prices, continuous conflicts in specific areas and poor rains.
- Countries of particular concern are Eritrea, Ethiopia, Kenya and Somalia where the food security is seriously deteriorating as a result of consecutive droughts. The performance of crops harvested in the third quarter of the year is in most areas 15 percent below the historical average. In Ethiopia and Kenya, these crops represent about 70 per cent of annual food crop production.
- In arid and semi-arid areas, the poor pasture conditions have severely affected the food security situation of pastoral and agro-pastoral livelihood groups.
- Global Acute Malnutrition is reaching alarming levels in some areas of Kenya, in central Somalia and the Somali Region of

Ethiopia (see Highlights).

- Food consumption in Kenya and Somalia is declining. In Somalia, children's diet consist mainly in cereal and oil. In Kenya, 2.5 million people in urban areas are unable to meet 50 percent of the recommended daily dietary intake.
- Staple food prices in all countries remain significantly higher than the five-year average, limiting access to food by the poorest population groups in both rural and urban areas.
- **Conflict and civil insecurity persist** in major parts of Somalia, northern Kenya and south-eastern parts of Ethiopia, restricting access to markets and contributing to high food prices.
- El Niño conditions could induce improved rainfall during the September-December season in some areas of Ethiopia, Kenya, Burundi, Rwanda, Uganda and northern Tanzania and be beneficial unless they lead to excessive flooding.

#### **SOUTHERN AFRICA**

Angola, Lesotho, Madagascar, Malawi, Mozambique, Namibia, Swaziland, Zambia, Zimbabwe

- Overall the food security situation is improving, particularly in rural areas, due to a good harvest in 2009. The region generally suffers from a lack of employment opportunities, low household incomes and a high prevalence of HIV/AIDS causing widespread poverty and poor food security.
- Only Lesotho and Namibia experienced a lower than average harvest. Pockets of food insecurity persist particularly in these countries and in the drier areas of Madagascar, Malawi, Mozambique and Zimbabwe.
- No overall shortfall of maize is foreseen. Deficit countries will be able to meet their national requirements through imports from South Africa, and possibly Mozambique, Malawi and Zambia.
- Staple food prices still at a high level are expected to stabilise or decline in most countries during the 2009/10 marketing year. In Zimbabwe, maize prices have decreased since the introduction of the US dollar as valid currency.
- El Niño may cause drier than normal conditions during October-December in western parts of the continental sub-region and in Madagascar.

#### **SUDAN**

#### Darfur, Southern Sudan, Northern Sudan

#### **Southern Sudan**

- As of early September, the food security situation is deteriorating due to late seasonal rains as well as escalating inter-ethnic and cross-border violence, the latter causing significant displacement of populations (250,000 people since January). Areas of concern are the south-eastern states of Jonglei and East Equatoria as well as Lakes and Upper Nile.
- The global acute malnutrition (GAM) rate is estimated at about 17 per cent.

#### **Darfur and Northern Sudan**

- The food security situation is stable, with pockets of concern in Darfur. Crop and pasture conditions look relatively favourable, with the exception of some areas in North and West Darfur as well as parts of Gedaref, Kassala and Sennar in the eastern region of northern Sudan.
- Although staple food prices remain above the three-year average, annual inflation has stabilised at around 10 per cent.
   Market conditions for surplus producers of sorghum and millet remain favourable.

#### **WEST AFRICA**

Benin, Burkina Faso, Central African Republic, Chad, Côte d'Ivoire, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Senegal, Sierra Leone, the Gambia, Togo

- High food prices continue to affect households' food security. Any improvement of the food security situation will depend on the grain harvest beginning in October.
- At the onset of the rainy season in August, floods affected about 600,000 people. Ten per cent of the population of Ouaqadouqou became homeless.
- Current projections for the 2009/2010 cereal production of the Sahel countries are within the five-year average but could be about 10 per cent lower than the record harvest of 2008/09.
   Projections for the coastal countries, with the exception of Liberia
- and Nigeria are above the favourable levels of the last season.
- Generally, pasture conditions have improved, although the pastoral and agro-pastoral areas of Chad and Niger still experience a deficit in pasture and forage.
- Prices of main food staples have been increasing but may ease
  when the new cereal harvest enters the market from October
  onwards. Cotton and cacao producers are experiencing higher
  prices, while the prices of coffee, groundnuts and palm oil remain
  40 per cent below the mid-2008 price level.

# North Africa, Middle East & CIS

#### **NORTH AFRICA & MIDDLE EAST**

Algeria, Egypt, Iraq, OPT, Syria, Yemen

- All countries have been affected by high food prices and the global economic downturn, resulting in rising unemployment. These have been alleviated to some extent by government consumer subsidies and food assistance programmes. In Yemen by far the poorest country in the subregion the drop of remittances and high prices of staple food have severely affected households.
- Following two consecutive years of below average production, the
- harvests of winter grains (mainly wheat and barley) have been good, except in the Badia Region of Syria severely affected by three years of drought.
- Conflicts and insecurity, the main causes of food insecurity among refugees and internally displaced people, are not expected to improve. Food insecurity in OPT will persist as long as movement restrictions and limited access to natural resources and markets are enforced.

#### CIS

Armenia, Georgia, Kyrgyz Republic and Tajikistan

- The overall food security situation is not expected to improve significantly until economic growth resumes and/or there is a further reduction of food prices. The situation deteriorated last year due to the increase of food prices, the economic downturn and the consequent reduction of remittances which play an important role in sustaining the livelihoods of many households in these countries.
- Food prices have declined due to lower international commodity prices, the elimination of tariffs and introduction of price ceilings but remain above the five-year average.
- The winter harvest of cereals has generally been above average, while summer crops have been somewhat affected by heavy rains, particularly in Tajikistan.

## **Asia**

#### **SOUTH ASIA**

Afghanistan, Bangladesh, India, Nepal, Pakistan, Sri Lanka

- In India, Nepal and Pakistan, the number of food insecure
  people is expected to increase as the production of summer
  crops is projected to be substantially lower than average due to late
  and erratic monsoon rains. The implementation of government
  assistance programmes may alleviate some of the effects.
- The prices of wheat flour, bread and rice have stabilized but remain above five-year average. Only in Bangladesh, where substantial food subsidies and production incentives are in
- place, the price of rice is close to the 2005-06 level.
- Sixty percent of households in Nepal have poor food consumption patterns. No recent data is available for the other countries.
- The global economic downturn has particularly affected the food security in Pakistan and Bangladesh. In parts of Afghanistan and northern Sri Lanka, food security is largely determined by the security situation.

#### **SOUTHEAST ASIA**

Cambodia, Indonesia, Myanmar, the Philippines, DPR Korea

- The number of food insecure people will remain high until economic growth resumes.
- The global economic downturn has led to the loss of employment opportunities and erosion of purchasing power. The Philippines have been particularly affected by a decline in remittances.
- DPR Korea will continue to face a serious supply shortfall of rice due to land and productivity constraints. The rice production for 2009 is projected to remain at the same level as in 2008.
- The price of rice remains well above the five-year average, except in Myanmar. Prices of other staples remain high in all countries.
- Recent floods in the Philippines, Cambodia, Laos and Vietnam has led to displacement of a large number of people.
- In Sumatra, in Indonesia, an earthquake has devastated Padang, and the nearby coastal town of Pariaman. Exact numbers of households affected is not yet available.

# Latin America and the Caribbean (LAC)

Bolivia, Guatemala, Honduras, Nicaragua, Haiti

- The reduction in remittances due to the global economic crisis has affected many households, leading to increased food insecurity in both rural and urban areas.
- It is estimated that LAC had the highest percentage increase of food insecure people of all geographical regions, as a result of the global economic crisis.
- Prices of main food staples have declined but remain above the

long-term average.

- Despite a modest growth rate in production, overall food availability has declined due to a reduction in commercial import capacity.
- El Niño is causing low rainfall in parts of Guatemala, Honduras and Nicaragua, affecting food crop production, and may cause flooding in the lowlands of Bolivia.

#### Sources:

- ASEAN Agricultural Commodity Outlook, June 2009
- CILSS/FAO/FEWS NET/WFP, Common Statement on the Food Security Situation and Agricultural Perspectives for the 2009/10 Season, 17 September 2009
- Joint Research Centre, MARS Bulletins for Eritrea and DPR Korea, September 2009
- FAO, Crop Prospects and Food Situation, July 2009
- FEWS NET, Monthly Security Updates and Alerts
- National Meteorological Departments (Monthly Rainfall Anomaly, Agricultural Perspective and Seasonal Forecast)
- National Statistical Offices (Consumer Price Trends and Inflation Rates)
- Southern African Regional Bulletin, FS Update, September 2009
- USAID, Complex Emergency Fact Sheets
- USDA/ERS, Food Security Assessment 2008-09, June 2009
- WFP, CD Executive Briefs
- WFP, Changes in Staple Food Prices in Selected Countries, July 2009
- WFP & Partner, Food Security Monitoring Reports

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### **Food security trends in selected countries • Third quarter**

The table presents information on the countries where WFP participates in a Food Security Monitoring System • Based on reports dated June, August and September 2009 • Changes are respective to the previous quarter

#### **EVOLUTION OF THE FOOD SECURITY SITUATION OVER THE THIRD QUARTER:**



**Severely Deteriorating:** 

Ethiopia, Kenya, Nepal, Somalia



#### Deteriorating:

Ghana (Northern region), Lesotho, Madagascar, Namibia, Zambia



Stable:

Swaziland, Tajikistan



#### Improving:

Afghanistan, Darfur, Malawi, Mozambique, Zimbabwe

Countries		Food Consumption	Prices	Malnutrition	Coping Strategies	Purchasing Power	Rainfall & Production	Food security trend in the last quarter	
East and Southern Africa	ЕТНІОРІА		The prices of wheat and sorghum have increased by almost 15% and 20% respectively since mid-2008. They account for nearly one-third of households' calorie consumption. Maize prices have also increased.  The overall the cost of the basic food basket is 61% higher than the five-year-average.	Malnutrition is a threat for children under 5 yrs old due to the critical water shortages.	Increased sales of livestock and firewood collection are major coping strategies reported.	Terms of Trade (TOT) are unfavourable for pastoral and agro-pastoral populations due to escalated cereal prices and reduced demand for livestock.	2-3 weeks delay in rains compared to normal.	As of August 2009 the food security continues to decline due to successive poor rains and rising cereal prices.	•
	KENYA	2.5 million people in urban areas are unable to meet 50% of their daily intake requirements.  Majority of households consuming 1-2 meals compared to the normal 3 meals.	The prices of maize, which account for more than one-third of calorie consumption, have increased by 70% since mid-2008.  The overall cost of the basic food basket is 36% higher than the five-year-average.  Price of water increased by 100-140%.	Malnutrition rates exceeds 15% reaching emergency levels in 4 of 6 Pastoral livelihood districts (Turkana, Samburu, Mandera, Wajir).	About 60% of men have migrated in search of labour opportunities. North Eastern part of Kenya; El-humow and Jarajila in Garissa division).	On average terms of trade (goats for maize) has deteriorated by 95% and in North Central Kenya, Samburu (Pastoral area) they deteriorated by 400%.  Average price of maize 79% higher while that of goat is 8% lower.	Low amounts of rainfall averaging 20-80% of normal.  2009 long rains were delayed 3-4 weeks and ceased earlier by 2-3 weeks.	As of August 2009 the food security continues to decline due to successive poor rains and rising cereal prices.	•
	LESOTHO		The price of maize, which accounts for more than half of calorie consumption, has increased by 35% since mid-2008.  The overall cost of the basic food basket is 38% higher than the five-year-average.  Rise in prices of inputs since May 2008 (fertilizer by about 50% and seed by 20%).	The level of stunting among children below the age of five ranged between 42-54%.	Households are increasingly cultivating sorghum over the past 3 years as a coping strategy. Sorghum is more resistant to drought than maize.	Prices of essential items have risen and opportunities for cash income have reduced for the poorer households.	Successive poor rains.  Maize production decreased by 10% since last year while sorghum production increased by 57%.	As of August 2009, prices are remarkably high and predicted to be on the rise. Overall reduction in production reported.	*

Coping Strategies

**Purchasing Power** 

Rainfall & Production

Food security trend in the last quarter

Countries

**Food Consumption** 

**Prices** 

Malnutrition

Countries		Food Consumption	Prices	Malnutrition	Coping Strategies	Purchasing Power	Rainfall & Production	Food security trend in the last quarter	
East and Southern Africa	SWAZILAND		The prices of maize, which accounts for approximately a-quarter of calorie consumption, are 10% higher than the five-year-average.  Rice prices have also increased, and overall the cost of the basic food basket is 4% higher than the five-year-average.	Low levels of acute malnutrition (1.1%).  Elevated levels of stunting (40%).		82% of urban population cite that purchasing power has gone down due to unusually high prices.	El Nino effect is likely to be causing a delayed rainfall season.  Forecasted production level is 70,672 tonnes which is a slight increase from the previous year 62,000 tonnes.	As of August 2009 production has improved and allowed for food security to remain fairly stable.	<b>→</b>
	ZAMBIA		The prices of maize, which account for more than half of calorie consumption, have increased by almost 37% since mid-2008.  The overall cost of the basic food basket is 52% higher than the five-year-average.	Zambia has among the highest rate of < 5yrs infant mortality in Southern Africa. Stunting 45.5%, wasting 3.6% and underweight of 15.2%.			34% higher cereal production compared to last year.  Very high rainfall resulting in 110,000 people in 7 flood affected districts been exposed to food insecurity.	As of <u>August 2009</u> the food security has been affected by the impact of the floods.	*
	ZIMBABWE		The prices of maize, which accounts for 43% of calorie consumption, have increased by almost 440% since mid-2008.  The overall cost of the basic food basket is 194% higher than the five-year-average.	The prevalence of malnutrition has remained stable over the past 3 yrs.  Global acute malnutrition rates are at 4.8%.		Amount of foreign currency in circulation is still limited and many rural households still rely on barter trade.	Cereal production improved from last season's production due to good rainfall and distribution of inputs.	As of August 2009, the food security has been fairly stable and improved slightly especially due to the improving political situation.	
	SUDAN (DARFUR ONLY)	In West Darfur the Food consumption levels have significantly increased from 6% last quarter to 26% this quarter.  In South Darfur, food consumption shows an improvement in all areas except the resident communities where it has deteriorated slightly (households with poor food consumption have increased from 6% to 11%).	In West Darfur prices of millet and sorghum are 10% higher than the previous quarter.	North Darfur has a slight deterioration in malnourished women where 18% of women have low MUAC (<225mm).  In South Darfur, improvement in nutrition with the overall mean MUAC increasing from 258.2mm last quarter to 260.1mm this quarter.  In West Darfur, women with a low MUAC (malnourished) has remained stable at 5%.	In North Darfur, less households are resorting to coping strategies. Roughly 15% employ low risk (in a scale of no coping, low coping, medium coping and high coping) coping strategies.	In West Darfur Terms of Trade have improved slightly due to the increase in goat prices being greater than the increase in cereal prices.	In West Darfur rainfall is far above the five-year-average.	As of August 2009, the overall food security has improved in most of the sampled locations compared to the 2nd FSMS round last quarter.	