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World Food Programme



Global Update

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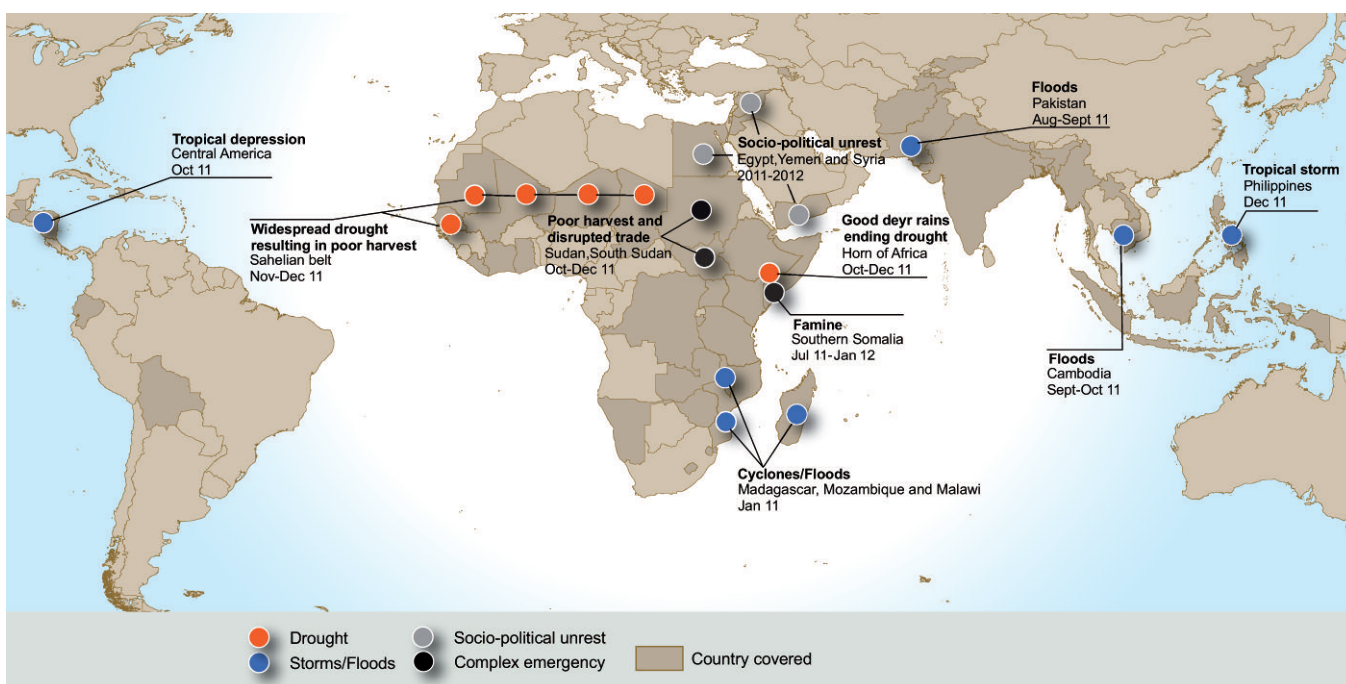
The Global Food Security Monitoring Update provides an overview of the food security situation in 52 countries in six regions from July to December 2011 and gives an outlook for the first 3 to 6 months in 2012. It is based on food security monitoring reports, updates from WFP's regional and country-based Vulnerability Analysis and Mapping (VAM) units and a review of secondary information.

Macro-economic and price trends at global level

- **Global growth prospects** deteriorated during the fourth quarter of 2011 as a result of the financial crisis in the Euro area. According to the International Monetary Fund (IMF), global output is projected to expand by 3.3 percent in 2012, a downward revision of 0.7 percentage points compared with September 2011 forecasts.
- Growth in **emerging and developing economies** is also expected to slow as a result of the global downturn and reduced internal demand (see Annex 1).
- **Oil and food price indices** of the IMF peaked in April 2011. Since then, they have declined in the light of a less favourable economic outlook, falling demand and a good crop production at global level.
- Despite recent declines, oil and cereal prices remained well above the five-year average (see Annex 2). The **Food Price Index** of the Food and Agriculture Organization of the United Nations (FAO) averaged 228 points in 2011, the highest level ever and 28 points above the previous high in 2008.
- **Price trends for 2012** remain unpredictable in the light of uncertainties over the global currency and energy markets.

Countries covered and major events affecting food security

July to December 2011



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Regional highlights

EASTERN AND CENTRAL AFRICA

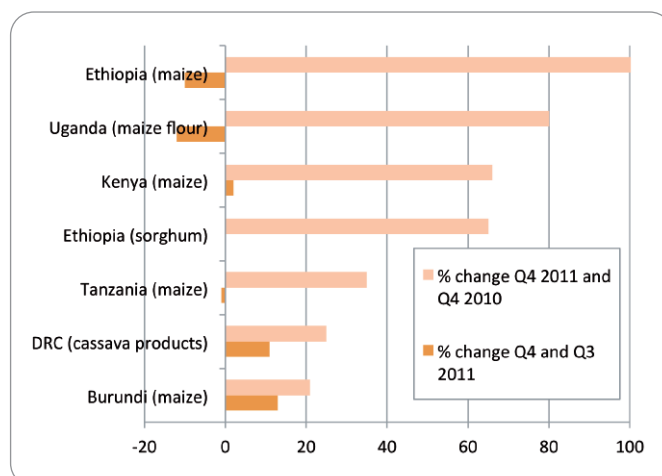
- The early onset of the short rains in the **Horn of Africa** from October to December ended the protracted drought that had caused two successive seasonal production failures in parts of Somalia, Ethiopia and Kenya.
- Despite improvements, emergency levels of food insecurity persist in **Southern Somalia** and parts of **Central and North Somalia**, where a third of the population are unable to meet their food and non-food needs.
- **South Sudan** has experienced a poor harvest coupled with increasing food prices as a result of disrupted trade from the north and increased demand from returning migrants. Nearly half of the population faces moderate or severe food insecurity. The country largely relies on food imports from **Uganda**, where the last harvest was good but transport to most areas in South Sudan is uncertain and costly.



WFP/Kenya

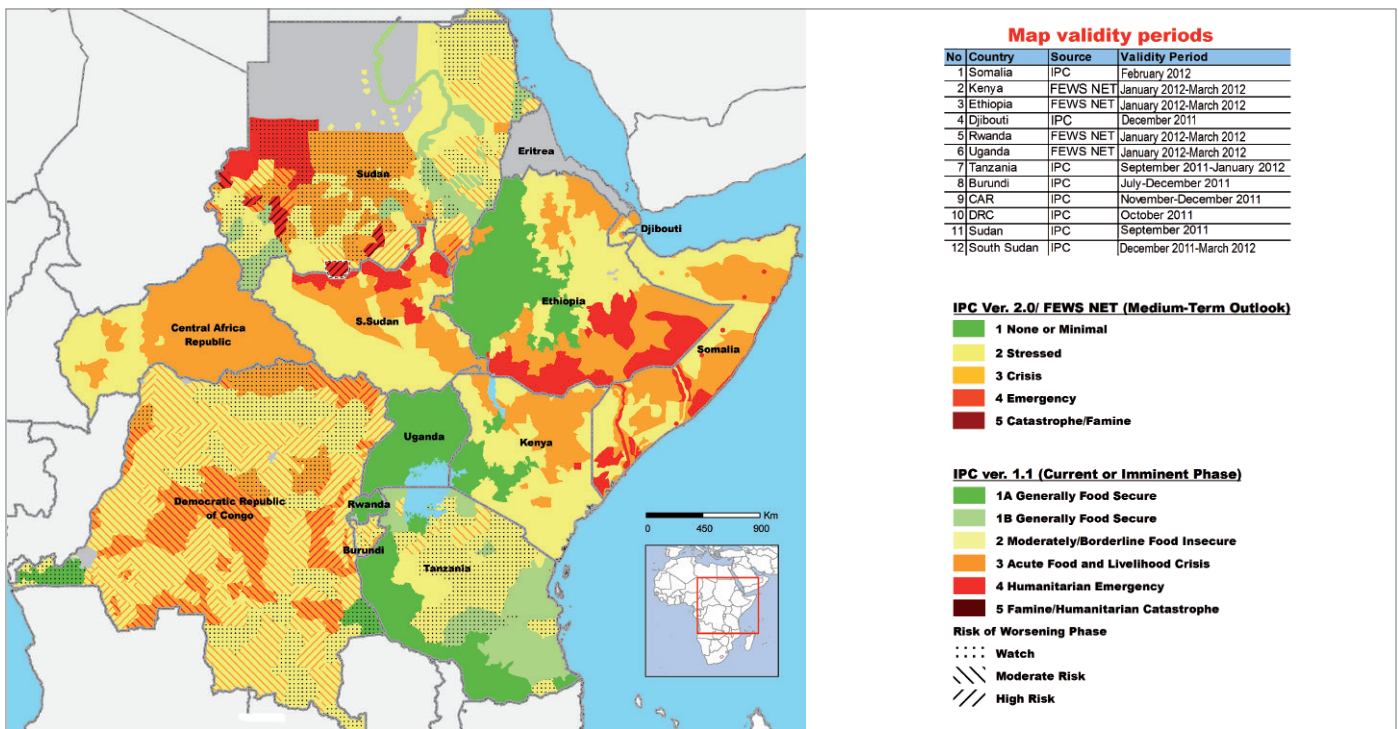
- Banana bacterial wilt and cassava mosaic diseases have threatened livelihoods in parts of **Burundi** and the **Democratic Republic of the Congo (DRC)**, where inter-communal clashes and displacements persist.
- Although harvest during late 2011 somewhat stabilized **cereal prices**, they remain **above the 2010 levels** across the region.
- Seasonal **weather forecasts** indicate average rainfall from March to May as the most likely scenario for the Horn of Africa, which would favour 2012 crop and pasture conditions. But there is moderate probability of below-average rainfall and of delayed rains, which would have a serious impact on food security. The Famine Early-Warning System Network (FEWS-NET) has therefore called for contingency planning.

Main cereal price trends in selected countries



Source: WFP Market Monitor, January 2012

Acute food insecurity overview in Eastern and Central Africa (February 2012)



Source: FSNWG, February 2012

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WESTERN AFRICA

- Projected **cereal production** across Western Africa is 4 percent above the five-year average, but 8 percent below the output in 2010/11. However, these results mask considerable disparities across the region.
- Chad** and **Mauritania** recorded significant decreases in cereal production – by 23 and by 38 percent respectively – compared with the five-year average. Compared with 2010/11,

the decrease in Chad was 50 percent, and that in Mauritania was 52 percent. The causes were cattle pests and insufficient rainfall. Unusually early seasonal livestock migration has been observed in both countries. Other areas affected by poor production were the Sahel belt zones in **Burkina Faso, Mali and Niger**, and parts of **Senegal and The Gambia**.



WFP/Chad

Main areas affected by drought in the Sahel

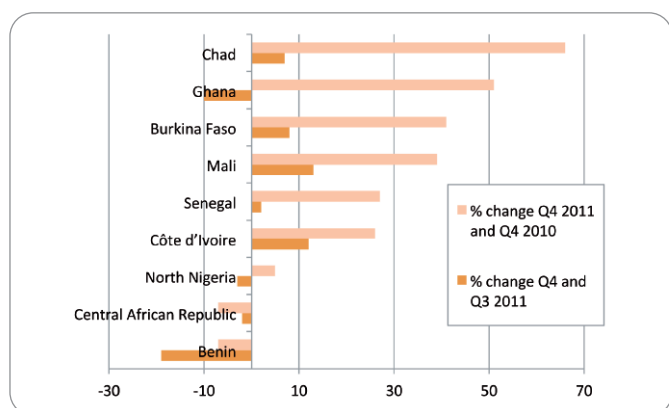


Source: FAO/WFP, February 2012

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- Good harvests and a surplus of maize are expected in **Benin, Ghana, Nigeria and Togo**. Anticipated exports should therefore mitigate food deficits in Sahel belt areas where markets remain functional.
- The decision by the Government of **Nigeria** to remove fuel subsidies as of 1 January 2012 resulted in 30 percent increases in official and black market fuel prices. The subsidies have been partially restored following a strike and unrest. Increased fuel prices in Nigeria could lead to increased food prices in Chad and Niger, both of which depend on Nigeria for coarse grain.
- **Côte d'Ivoire** is recovering from months of conflict. Food insecurity remains a concern in the western region. Improvements will depend on the restoration of security, recovery of livelihoods and resettlement of displaced people.

Maize price trends in selected countries



Source: WFP Market Monitor, January 2012

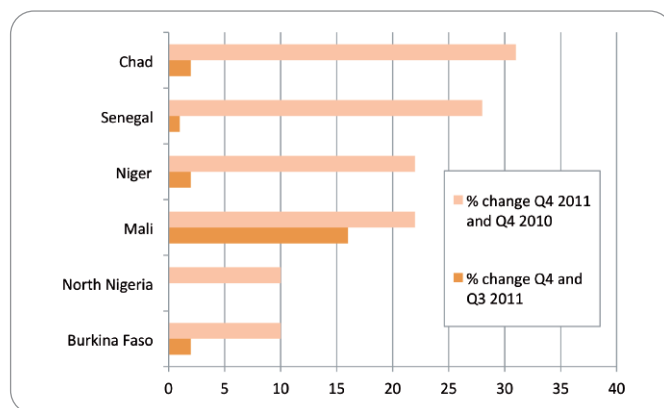
- With a few exceptions, the prices of major cereals increased sharply compared with 2010 and the five-year average. The Sahelian countries experienced **unseasonal price increases for maize and millet** in the fourth quarter of 2011, despite the ongoing harvest, because of poor crop performance.

- The price of rice, the largely imported staple in **West African coastal countries**, remained well above 2010 levels in **Ghana**,

Guinea, Liberia and Sierra Leone. These increases are related to high prices in Guinea that are causing increased cross-border flows.

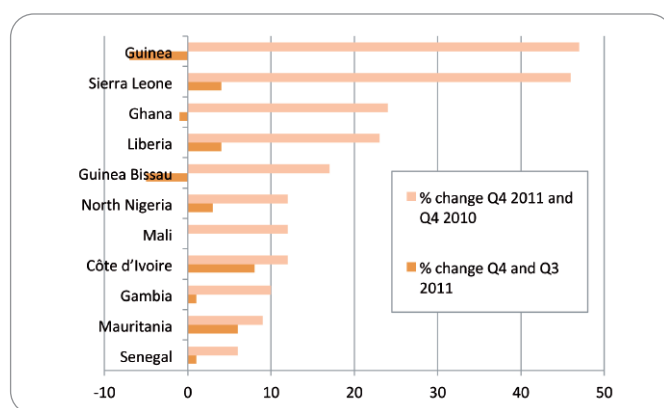
- **Seasonal forecasts** in the Sahel predict above average rainfall in April-June 2012, which would allow an early start of agricultural activities and hence shorten the hunger gap.

Millet price trends in selected countries



Source: WFP Market Monitor, January 2012

Rice price trends in selected countries

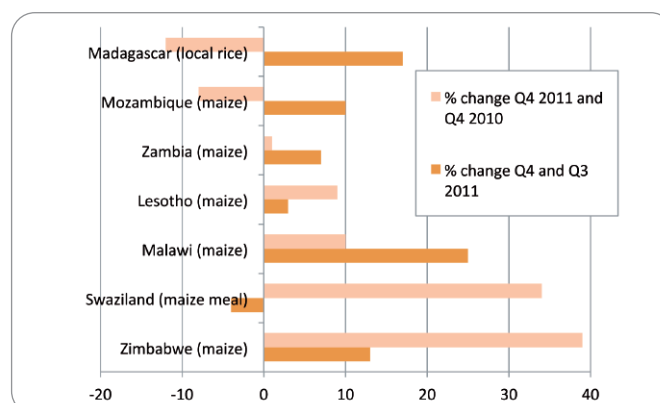


Source: WFP Market Monitor, January 2012

SOUTHERN AFRICA

- The number of people in need of **food assistance** in 2011/12 fell in comparison with the five-year average. This was a result, according to the annual assessments by the Vulnerability Assessment Committees (VACs), of above-average cereal production in 2010/11. **Lesotho** and **Namibia**, however, were affected by excessive rainfall during the cropping period. The figures may be adjusted upwards in **Malawi** and **Swaziland** as a result of socio-political and economic instability.
- As the lean season approached, nominal **cereal prices increased** in most countries during the fourth quarter 2011. Fuel shortages caused cereal price increases in **Malawi** and **Swaziland**, compared with 2010. Food prices in **Zimbabwe** increased as a result of restored import duty on certain food commodities.

Main cereal price trends in selected countries



Source: WFP Market Monitor, January 2012



WFP/Mozambique

- Late rains** in most countries delayed planting, but maize is less likely to be affected during the early cultivation period. The normal to moderately above average rainfall forecast for the first quarter of 2012 should compensate for poor rainfall at the beginning of the agricultural season.
- The 2011/12 **cyclone season** is forecast as particularly active. **Madagascar** and **Mozambique** were affected several times in

early January by cyclones that caused rivers to rise and floods. The Incomati and Zambezi river basins in Mozambique are already above alert levels. **Southern Malawi** and **parts of South Africa** are also affected by widespread flooding. Crop damage might result in a longer lean season in affected areas because the “green harvest” that normally enhances food supplies in March and April may be delayed or reduced.

Estimated number of food insecure people according to national VACs*

Country	2008/09	2009/10	2010/11	5-year average	2011/12
Lesotho	353 000	450 000	200 000	360 340	514 000
Malawi	673 498	147 492	508 000	445 038	201 854
Mozambique	302 700	281 300	350 000	338 800	250 000
Namibia	n/a	224 795	106 297	165 546	243 474
Swaziland	238 600	262 000	160 989	294 498	88 511
Zambia	444 624	110 651	53 629	286 061	74 804
Zimbabwe	5 100 000	1 400 000	1 287 937	2 656 087	1 442 000**
Total	7 112 422	2 876 238	2 666 852	4 447 043	2 564 643

* Source: Southern Africa Development Community (SADC), Regional Vulnerability Assessment and Analysis, summary of results (July 2011) and national VAC reports; combines populations facing acute and chronic food insecurity.

** The 2011/12 number includes 416,000 urban food insecure.

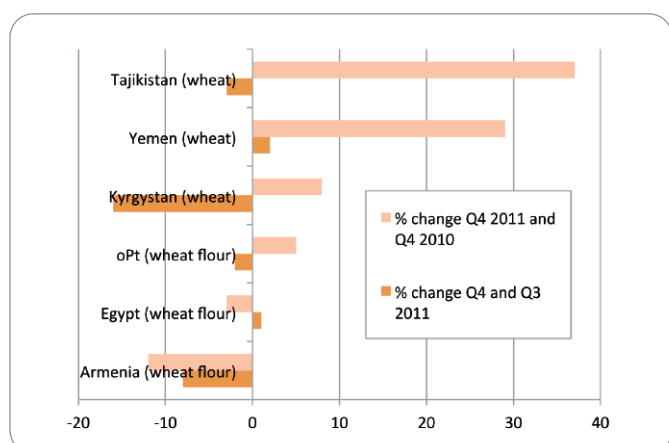
MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA



WFP/Yemen

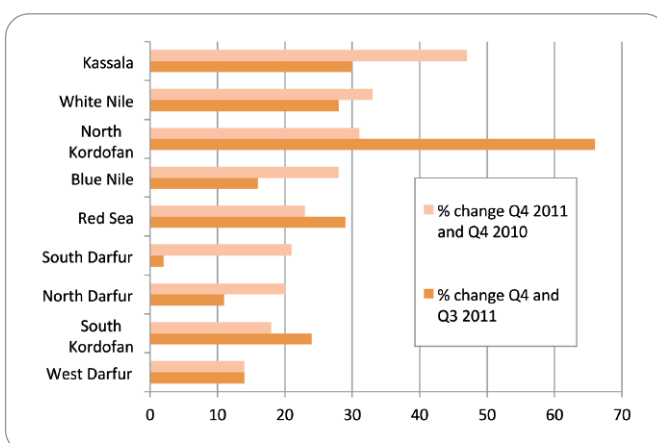
- Political unrest disrupted economic activity across the region in 2011. Food security is deteriorating in **Yemen** and in conflict-affected areas of **Syria** marked by displacement and disruptions of livelihoods, market access and key public services such as health care, water and sanitation. Acute malnutrition is reaching alarming levels in parts of Yemen.
- Following the separation of South Sudan, the **Sudan** faces increasing humanitarian challenges resulting from increasing conflicts in Abyei, South Kordofan and Blue Nile. The situation is aggravated by continued unrest in Darfur, a poor harvest and rising staple food prices.
- Despite the official easing of the blockade of Gaza a year ago, 1.4 million people in the **occupied Palestinian territory** remain food insecure as a result of high unemployment and lack of market integration.
- The food security situation is improving in the **Caucasus** and **Central Asia** as economic activities increase after the global economic crisis and the 2010 conflict in **Kyrgyzstan**. The exception is **Tajikistan**, where the situation is deteriorating because of a poor wheat harvest in 2011. The record wheat harvest in **Kazakhstan** and continued inflows of remittances may prevent negative impacts.
- **Wheat prices** have increased considerably in **Yemen** and **Tajikistan** compared with 2010. Food subsidy programmes in **Egypt** and **Syria** stabilized the prices of wheat and bread. In the **Sudan**, **sorghum prices** increased seasonally and year-on-year as a result of the economic downturn, poor harvests and increasing insecurity.

Main cereal price trends in selected countries



Source: WFP Market Monitor, January 2012

Sorghum price trends in Sudan



Source: WFP Market Monitor, January 2012

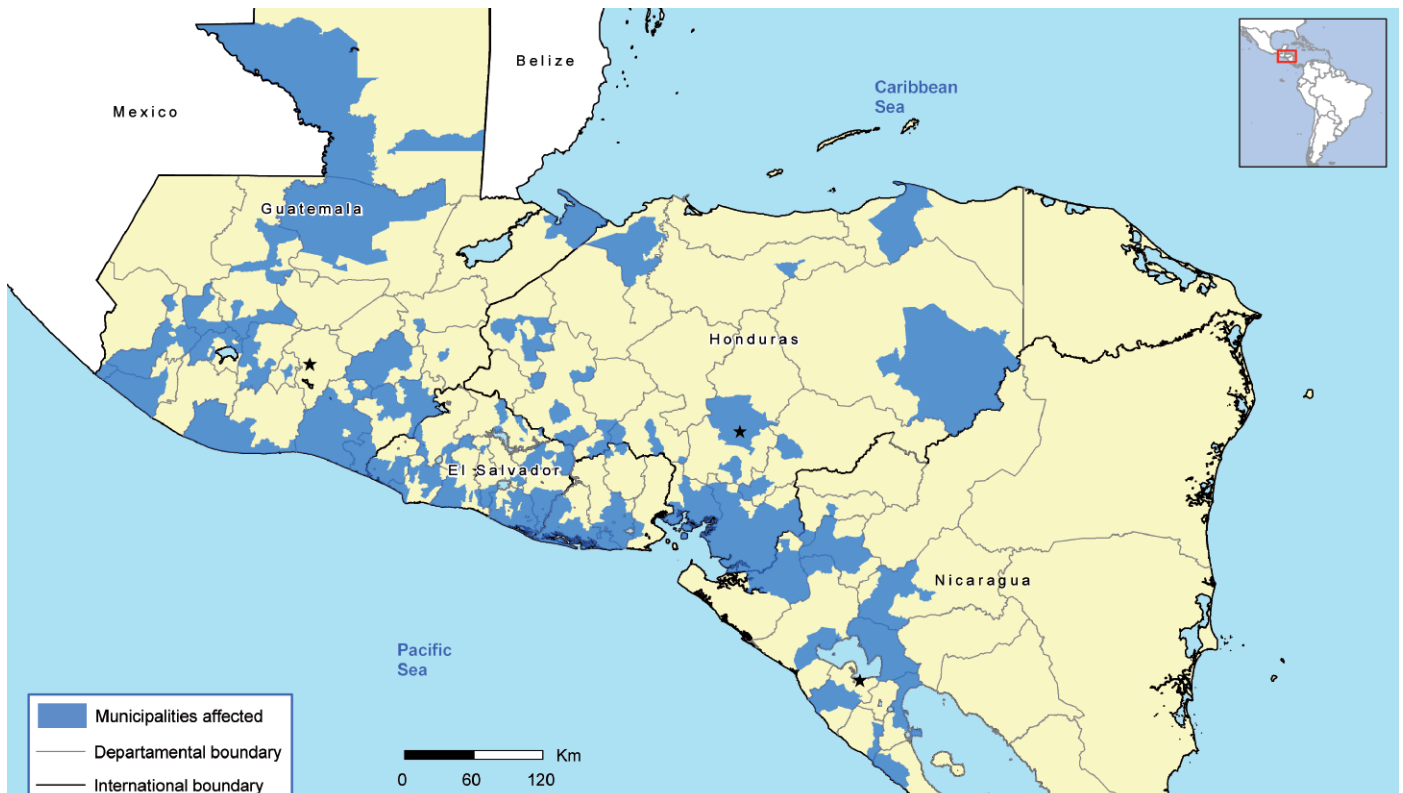
LATIN AMERICA AND CARIBBEAN



WFP/El Salvador

- In October 2011, tropical depression 12-E displaced thousands of people and caused crop deficits in parts of **El Salvador, Guatemala, Honduras** and **Nicaragua**. As a result, the lean season in 2012 will start one or two months earlier in these areas.
- Despite these losses, the average nominal **price of maize fell** between the third and fourth quarter of 2011 as a result of the global decrease in food prices and expectations of approaching harvests. Prices are higher than in 2010, however, except in Nicaragua.

Flood affected municipalities by tropical depression 12-E in Central America



Source: WFP, November 2011

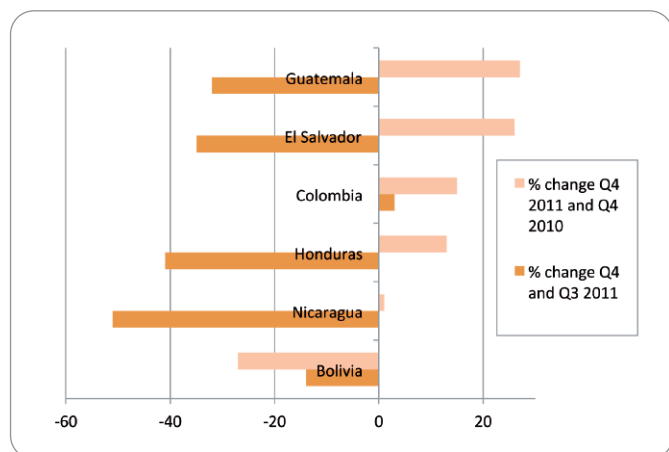
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- **Haiti** is recovering from the 2010 earthquake and subsequent cholera outbreak, but 3.9 million people are still food insecure.
- In **Colombia**, above average rainfall in October and November affected 300,000 people and caused 100 deaths.
- The combined impacts of landslides in July 2011, a volcanic

eruption in November 2011, and prolonged dry spells are affecting 80,000 people in **Ecuador**.

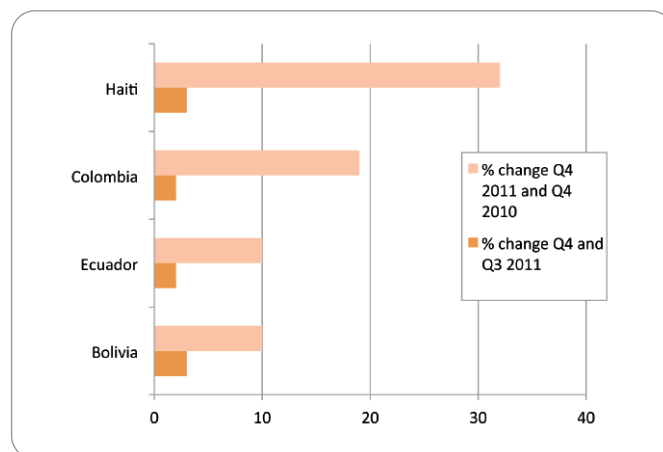
- **Weather forecasts** for February-May 2012 indicate above normal rainfall and lower temperatures possibly associated with La Niña in northern areas of South America, from Ecuador through Colombia and Venezuela to the Guyanas and into Central America.

Maize price trends in selected countries



Source: WFP Market Monitor, January 2012

Wheat price trends in selected countries



Source: WFP Market Monitor, January 2012

ASIA



WFP/Pakistan

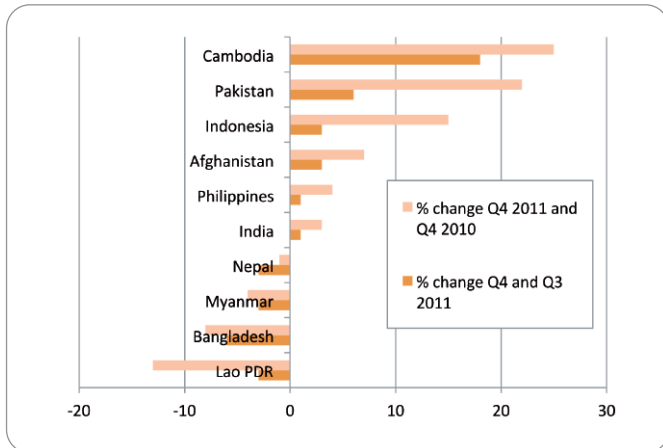
- Serious flooding caused by tropical storms between July and December 2011 affected the South-East Asia and South Asia regions, particularly **Bangladesh**, **Cambodia**, the **Democratic People's Republic of Korea (DPRK)**, **India**, the **Lao People's Democratic Republic**, **Myanmar**, **Nepal**, **Pakistan**, the **Philippines** and **Thailand**.

- Despite the flooding, **Bangladesh**, the **Lao People's Democratic Republic**, **Nepal** and **Pakistan** experienced good or even record harvests, but vulnerable groups in areas affected by the floods still require assistance.
- **Pakistan** experienced severe floods in August and September for the second year in a row. Despite a good national harvest, 2.5

million vulnerable people affected by the floods will require food assistance in 2012.

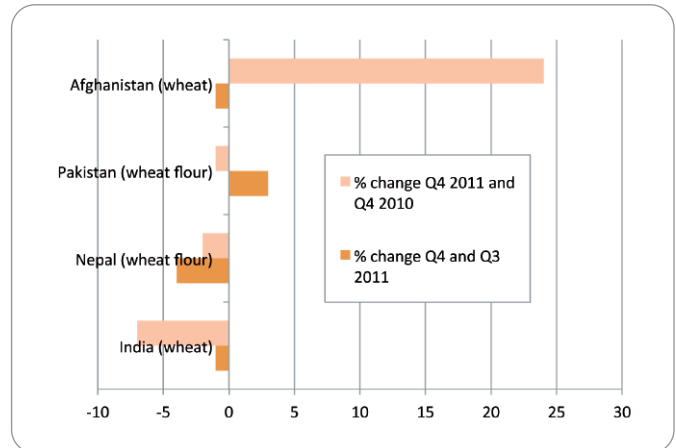
- In September, **Cambodia** experienced the worst floods since 2001, which affected 330,000 households. An assessment to determine the mid-term to long-term impacts was conducted in January 2012 and results are forthcoming.

Rice price trends in selected countries



Source: WFP Market Monitor, January 2012

Wheat price trends in selected countries

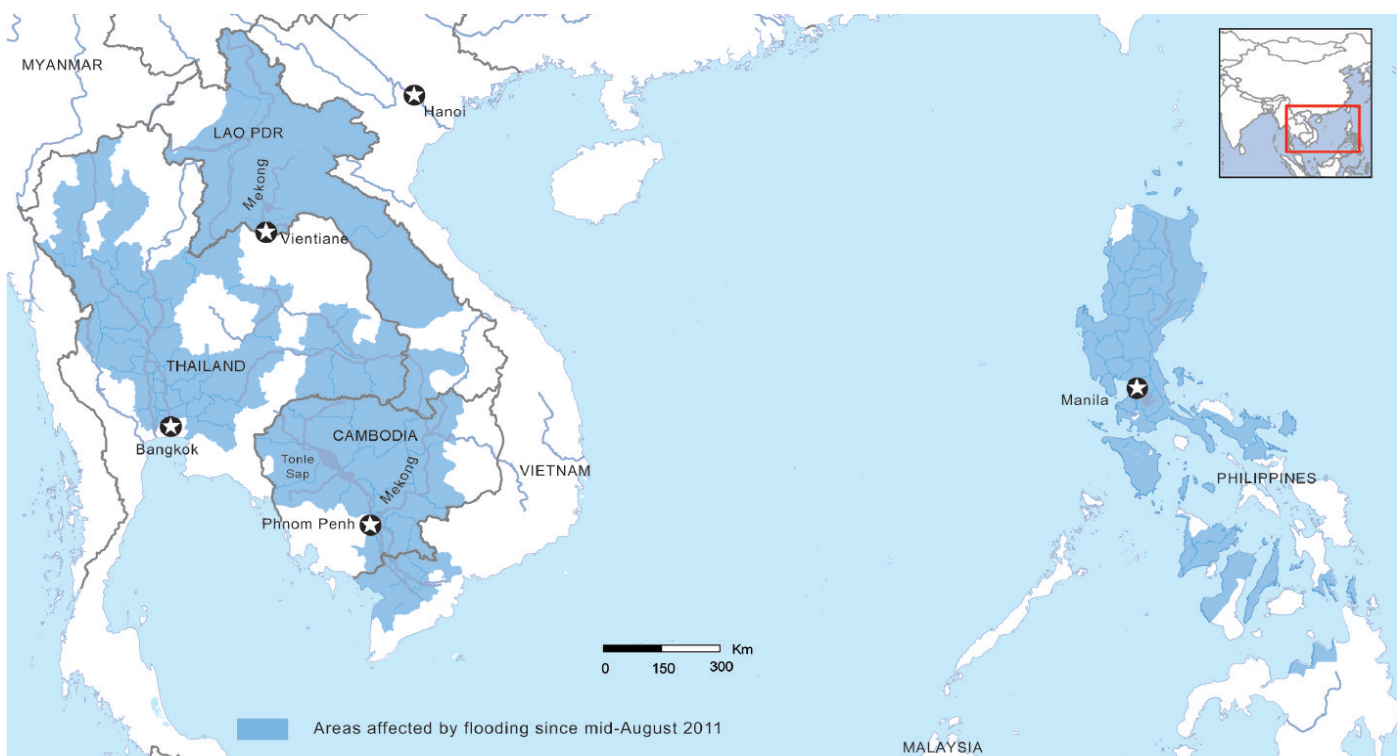


Source: WFP Market Monitor, January 2012

- Tropical storm Washi struck the southern province of the **Philippines** in mid-December. An in-depth needs assessment is currently under way.
- The drought in the northern provinces of **Afghanistan** caused production losses, increased import requirements and higher wheat prices; the lean season started three months earlier than

- There is concern across the region that **food prices are much higher than the five-year average**. Compared with 2010, the largest increases in rice prices were recorded in **Cambodia**, **Indonesia** and **Pakistan**. Wheat prices were stable across the region, except in **Afghanistan**.

Flooding in Southeast Asia (October 2011)



Source: OCHA, October 2011

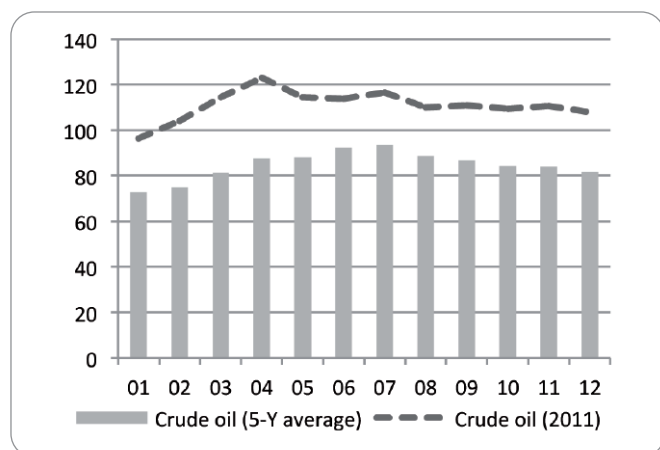
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Annex 1 IMF World Economic Outlook (WEO) projections, January 2012

	Economic growth (% change)		Economic growth projections (% change)		Difference from September 2011 projections	
	2010	2011	2012	2013	2012	2013
World output	5.2	3.8	3.3	3.9	-0.7	-0.6
Advanced economies	3.2	1.6	1.2	1.9	-0.7	-0.5
Emerging and developing economies	7.3	6.2	5.4	5.9	-0.7	-0.6
Sub-Saharan Africa	5.3	4.9	5.5	5.3	-0.3	-0.2
Middle East and North Africa	4.3	3.1	3.2	3.6
Commonwealth of Independent States	4.6	4.5	3.7	3.8	-0.7	-0.6
Developing Asia	9.5	7.9	7.3	7.8	-0.7	-0.6
Latin America and the Caribbean	6.1	4.6	3.6	3.9	-0.4	-0.2

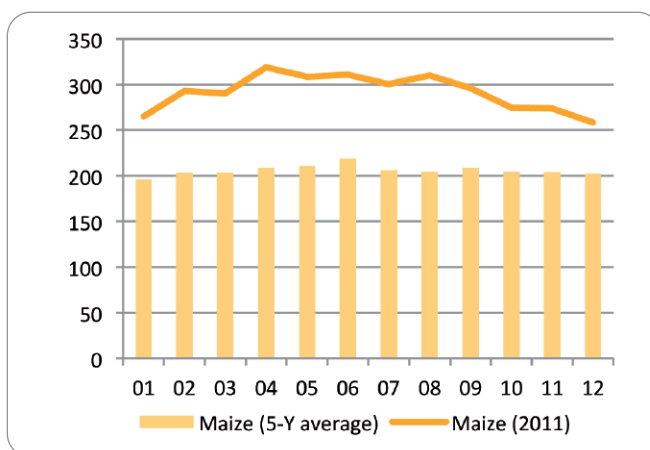
Annex 2 2011 global prices compared to 5-year average

Crude oil (Dated Brent, US\$/barrel)



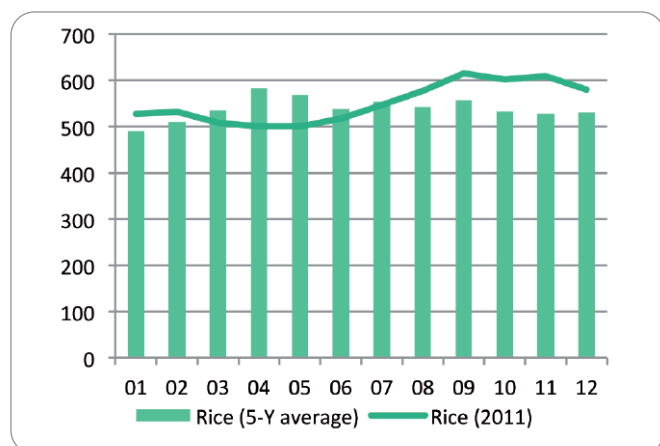
Source: IMF Data and Statistics, January 2012

Maize (US\$/mt)



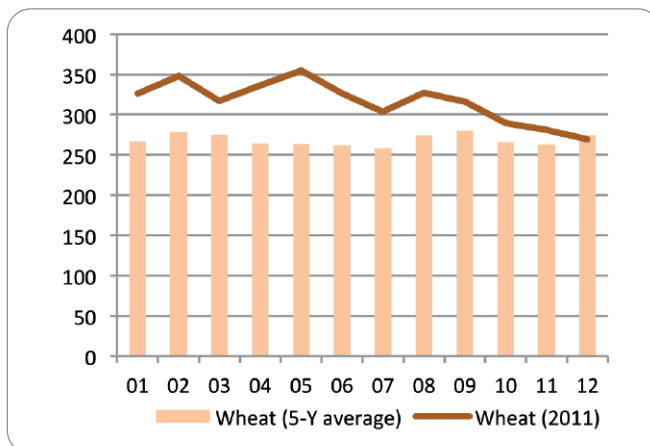
Source: IMF Data and Statistics, January 2012

Rice (US\$/mt)



Source: IMF Data and Statistics, January 2012

Wheat (US\$/mt)



Source: IMF Data and Statistics, January 2012

Annex 3 Country summaries

EASTERN AND CENTRAL AFRICA

FOCUS: Somalia, Ethiopia, Kenya, Djibouti, Uganda, South Sudan, Tanzania, Burundi and Democratic Republic of the Congo

SOMALIA: The latest analysis by the Food Security and Nutrition Analysis Unit (FSNAU) and FEWS-NET shows that the situation in Southern Somalia has improved from famine to emergency-level food insecurity according to the Integrated Food Security Phase Classification (IPC)-scale. This is the result of substantial humanitarian assistance and the start of the *deyr* harvest (October-December). The above-average production has led to significant reductions in cereal prices in vulnerable areas in the south, improved the purchasing power of pastoralists and increased agricultural labour opportunities. These factors have mitigated the worst food deficits and reduced mortality levels. Nonetheless, 2.3 million people remain in crisis in February 2012, of whom 1.7 million live in the south, where humanitarian access is severely restricted.

ETHIOPIA: The multi-agency Humanitarian Requirement Document indicated that 3.2 million Ethiopians will require relief food assistance in 2012. This reflects improvements in the food security situation resulting from the good 2011 *meher* harvest in November/December. In the second half of 2011, 4.5 million people needed relief assistance because of the drought. The worst affected areas included agro-pastoral and pastoral zones in Somali region and other parts of the south and south east. The *deyr* rains temporarily alleviated water and pasture shortages, but full recovery of livestock productivity will take time. In Dolo Ado, there are 144,000 refugees who fled from the famine in Somalia. Heavy rains and floods in October and November and floods in parts of the south east damaged crops and infrastructure. The *sapia* rains (December-January) in Southern Nations, Nationalities and People's Region (SNNPR) are reported as delayed: these rains are essential for the development of sweet potatoes, which are important in the hunger season. It will be essential to monitor the next *belg* rains (February-May), particularly in the southern, south-eastern and eastern parts of the country.

KENYA: In November 2011, 3.75 million people were still at the stressed, crisis or emergency level on the IPC scale because of the drought. The situation has improved following above average October-December short rains, which improved water availability and pasture conditions, increased the availability of milk and enhanced farm labour opportunities; ongoing interventions also contributed. But excessive rains and flooding have caused loss of life and livelihoods in some areas. Maize prices are expected to decline in the first quarter of 2012, primarily because of an increase in domestic supply; further improvement is expected in the second quarter of 2012 as short-rains crops are harvested in February and March. Inter-communal clashes in northern and central Kenya and deteriorating security in Dadaab near the Somali border may affect deliveries of humanitarian aid, undermine recovery and impede movements of pastoralists. Registrations in Dadaab have been suspended because of insecurity, but 556,000 refugees continue to receive relief food assistance from WFP.

DJIBOUTI: The December 2011 Consolidated Appeals Process (CAP) called for assistance for 206,000 vulnerable people in 2012, an increase of 85 percent compared with 2011; the increase results from the inclusion of vulnerable urban households and refugees. Successive failed seasons have led to poor pastures and livelihood conditions and increased food insecurity among pastoralists. In the north-western pastoral zone, improvements are not expected before April 2012 because the dry season runs from October to March. The trend in the south-eastern border pastoral zone will depend on the performance of the *heys/dada* rains (October-February), which started poorly. The most vulnerable households are affected by a ban on charcoal production and firewood sales, which are typical survival strategies of poor households.

SOUTH SUDAN: According to the WFP-led food security monitoring system, 48 percent of the population were severely or moderately food insecure in October 2011, a 12 percentage point increase from 2010. WFP is planning to assist 2.7 million food insecure residents, internally displaced people (IDPs) and returnees in 2012. The situation is a result of reduced crop production in South Sudan caused by late and irregular rainfall. The recent crop and food security assessment mission (CFSAM) by the Government, FAO and WFP estimated cereal production to be 19 percent less than the good 2010 harvest. The lean season is expected to start in February or March, one or two months earlier than normal, coinciding with significant food scarcity and high prices as a result of the closure of the border with Sudan in May 2011, which halted trade. The situation is aggravated by increased demand from returnees following independence in July 2011 and 150,000 people who fled the conflict in Abyei, Blue Nile and Southern Kordofan. Cattle raiding and inter-communal fighting have increased since December, particularly in Jonglei state. This may become worse as pasture and water resources are deteriorating during the dry season.

UGANDA: A good harvest in June and July and falling maize prices have led to improved food security. The December/January harvest is expected to be average or above-average. A threat of foot and mouth disease in Karamoja region has subsided; livestock markets reopened after the vaccination campaign by the Ministry of Agriculture and FAO. The food security outlook remains favourable, especially if the second harvest turns out as expected. Seasonal prices have slowly declined, but they remain 80 percent higher than in 2010 due to increased food exports to South Sudan. The new state is expected to remain dependent on food imports from Uganda in 2012.

TANZANIA: The Government Food Security and Nutrition Assessment showed that 1 million people needed food assistance at the peak of the November-January lean season. Poor performance of the December-April rains reduced the availability of food and the lean season started in September instead of November. A ban in May on exports of cereals, intended to stabilize prices, was lifted only in October. Better weather during the *vuli* season (October-January) should improve food security from January 2012, but aggregate cereal production in 2011/12 is expected to be 7 percent below the 2010 bumper harvest and 3 percent less than the five-year average.

BURUNDI: The June 2011 CFSAM estimated that 800,000 people, 10 percent of the population, were food insecure; this figure has remained stable since 2009. Aggregate cereal production in 2011 was estimated at 2 percent higher than in 2010. Banana bacterial wilt and cassava mosaic diseases affected 70 percent of the country and caused major income losses as these crops account for 50 percent of agricultural production. Prospects for the September-January harvest are mixed: rainfall is generally good, but intense rain in the north and flooding in low-lying areas could reduce agricultural output.

DEMOCRATIC REPUBLIC OF THE CONGO: The October 2011 IPC analysis showed that 4.5 million people were in the acute food and livelihood crisis phase; recent WFP assessments show that half of the populations of Kasai Oriental, Kasai Occidental and Oriental provinces are food insecure. Attacks by rebels, clashes between the army and insurgents and inter-communal fighting are affecting household food security in the east: conflict had displaced 1.7 million people by mid-2011. Banana bacterial wilt has affected South Kivu, where bananas are a staple food and the main source of income. The outlook for the coming months depends on the aftermath of the elections that took place in November 2011 which could further escalate conflict throughout the country. The recent eruption of Nyamulagira volcano in North Kivu should also be monitored.

WESTERN AFRICA

FOCUS: Chad, Mauritania, Niger, Mali, Senegal, The Gambia, Liberia, Côte d'Ivoire, Ghana

CHAD: The recent crop assessment by the Permanent Inter-State Committee for Drought Control in the Sahel (CILSS), FAO and WFP showed that 1.6 million people are at risk of food insecurity in the Sahelian belt and the south caused by drought and bird and grasshopper infestations. Cereal production is 50 percent lower than last year's record harvest and 23 percent below the five-year average. The drought has reduced pastures in the northern Sahelian zone, triggering an early seasonal migration of pastoralists towards the south. Despite the August-November harvest, cereal prices rose in the fourth quarter of 2011. Rising food prices in Darfur may have put pressure on prices in eastern Chad. The situation is likely to deteriorate in the next three to six months as food stocks decline. The dependence on food imports from Nigeria, where fuel prices have increased by one third since January 2012, could aggravate the situation.

MAURITANIA: WFP estimated that 700,000 people, mainly subsistence farmers and small-scale pastoralists, had poor or borderline food consumption in December 2011. A recent CILSS/FAO/FEWS-NET crop assessment showed that late rains in 2011 reduced cereal production by 52 percent compared with 2010 and by 38 percent compared with the five-year average. The price of sorghum increased sharply during the second half of 2011. The number of food insecure people could increase in the coming months as food stocks become depleted in rural areas; many rural households could migrate to urban areas. The Government has requested international assistance to address the food and nutrition crisis.

NIGER: The national Household Food Security and Vulnerability Survey in November and December 2011 showed that 35 percent of households – 5.4 million people – were food insecure and 1.3 million were severely food insecure. The recent CILSS/FAO/WFP crop assessment estimated that cereal production in 2011 was 27 percent less than the record harvest in 2010 and 10 percent below the five-year average as a result of erratic rainfall, extended dry spells and pests in southern agricultural zones. Pastoral zones were affected by poor pasture and lack of water points. Food prices did not decline as usual during the harvest in the last quarter of 2011. The political and economic situation in Nigeria and production deficits in Burkina Faso and Mali are likely to result in increased food prices. Both countries have banned grain exports, which could reduce maize flows to Niger. The situation is likely to deteriorate in the coming months as food stocks are depleted early.

MALI: In December 2011 the national early-warning system estimated that food insecurity could reach crisis level for 3 million people. Drought and grasshopper and bird infestations reduced cereal production by 20 percent compared with the good harvest in 2010. There have been cereal shortages in major markets in the Sahelian belt as a result of unusually low supplies after the harvest and increased demand from neighbouring countries; these led to export restrictions to increase the availability of local grain. In the last quarter of 2011, the average price of millet increased by 16 percent despite the ongoing harvest. The purchasing power of pastoralists has declined, and the shorter harvest season has reduced opportunities for households that rely on casual labour. The food security situation is expected to deteriorate in the next six months.

SENEGAL: Food and nutrition security is likely to deteriorate in many areas: food stocks are estimated to cover only two months of households' requirements in 13 departments as a result of a poor harvest. The areas worst affected are mainly the central and eastern regions. Late and unevenly distributed rains and a shortage of seeds and subsidized fertilizer affected the production of millet, paddy rice and groundnuts. Cereal production was 31 percent below the good harvest in 2010 and 15 percent below the five-year average. The price of imported rice increased by 6 percent compared with 2010, a moderate change compared with other West African coastal countries. However, the price of millet increased by 21 percent and that of maize by 27 percent. In the most food insecure areas of Matam, Tambacounda, Kédougou and Sédhiou regions, the lean season is expected to start in January; in other regions it is expected to start two months earlier than usual.

THE GAMBIA: The December 2011/January 2012 post-harvest assessment showed that 520,000 rural people were affected by poor harvests. Production of all major crops fell compared with the 2010 agricultural season as a result of drought: upland rice decreased by 79 percent, groundnuts by 67 percent and millet by 54 percent. In the poorest urban areas, 193,000 people were at risk of food insecurity as a result of floods, rising food prices and increased living costs. Vulnerability to food insecurity is likely to rise in the coming months. Early depletion of food stocks will lead to an earlier lean season. Prices are likely to remain high because of reduced production and depreciation of the currency in December 2011.

LIBERIA: The 2011 rice harvest was good. In spite of erratic rainfall in several areas, cereal production was similar to the above average 2010 level. However, late rains and the influx of Ivorian refugees who contributed to a depletion of seed stocks caused a decline in production in the south-east. Despite the good harvest, average quarterly prices for rice increased by 23 percent compared with 2010. This is partly related to increasing demand by Ivorian refugees but also reflects Liberia's reliance on rice imports, which account for two thirds of national cereal requirements. With the price of rice 20 percent to 30 percent higher in neighbouring Guinea, there is also a significant cross-border outflow from north-western Liberia. As a response to rising prices, the Government has suspended import tariffs on rice. Some Ivorian refugees have returned home, but 128,000 remained in January 2012, of whom 50,000 to 70,000 are expected to return in the coming months.

CÔTE D'IVOIRE: Following the arrest of the former president in April and elections in December 2011, the socio-political situation has improved. About 500,000 displaced Ivoirians have returned home, of whom 80,000 returned from Liberia; more will follow in the coming months. There are still 15,500 IDPs, including 5,000 in Abidjan. Continuing insecurity, particularly in western areas, prevents economic activities and access to the fields: an assessment by WFP and the Government in October 2011 showed that only a third of households planted crops in 2011 and that 43 percent of households had poor food consumption. Access to food will continue to be a challenge for recently resettled households in the coming months.

GHANA: Limited access to food could affect 20 percent to 30 percent of farming households in the north in the coming months as a result of an early end to the rains affecting the maize, groundnut and rice harvests. Poor grain production across the Sahel has tightened the supplies in local markets, and more people are expected to migrate to the south in search of work. National cereal production was similar to the above-average 2010 level of 2.9 million mt. However, in the last quarter of 2011 the price of maize increased by 51 percent and that of rice by 24 percent compared with the same period in 2010, possibly reflecting increased outflows of food to Sahelian countries affected by drought.

SOUTHERN AFRICA

FOCUS: Lesotho, Namibia, Malawi, Swaziland, Zambia, Zimbabwe, Mozambique and Madagascar

LESOTHO: Due to excessive rainfall and flooding between December 2010 and January 2011, 514,000 people are estimated to be food insecure in the 2011/12 lean season, a major increase by 157 percent from 2010/11. A prolonged dry spell from mid-October delayed planting and left large parts of agricultural land uncultivated. But maize is tolerant to water deficits during the initial stages of development, so the improved rains forecast for January-March 2012 could offset the negative effects of the poor initial rains.

NAMIBIA: The number of food insecure people increased by nearly 50 percent in 2011/12 compared with the 2010/11 lean season as a result of heavy rains and flooding between January and April 2011. Livestock and crop losses affected more than 130,000 people in the northern regions. Cereal production in the 2010/11 agricultural season was estimated to be 25 percent less than the good harvest of 2010.

MALAWI: The number of food insecure households in the 2011/12 lean season was 60 percent less than in 2010. The figures are being adjusted for the negative impacts of the ongoing economic crisis caused by declining donor support and reduced earnings from tobacco exports in 2011, which led to a dwindling of foreign exchange holdings and reduced the country's ability to pay for imports. This resulted in shortages of fuel and raw materials and the development of parallel markets. Reduced production has already led to major job losses. Despite the devaluation of the currency in August 2011, black market prices remain high and well above official prices. At the end of 2011, the Government banned maize exports to reduce the outflow of cereals to neighbouring countries. In mid-January 2012, flooding in Nsanje district affected about 4,000 people.

SWAZILAND: The number of food insecure people was estimated at around 89,000 during the 2011/12 lean season, about 50 percent fewer than in 2010/11. This figure may have to be revised in the light of the ongoing economic crisis. Swaziland has severe liquidity constraints and enforced budget cuts have affected agricultural input support for farmers. The fiscal problems started with the 2009 recession in South Africa, which triggered a collapse in revenue from the Southern Africa Customs Union. The country depends on fuel from South Africa, but a strike in the South African petroleum industry in mid-2011 seriously reduced supplies: this affected the transport sector and raised the prices of food and other goods. The price of maize meal was 34 percent higher in the fourth quarter in 2011 than in the same season in 2010.

ZAMBIA: The number of food insecure households has remained relatively low over the last two years compared to other countries in the region given the three successive bumper harvests since 2008/09 resulting from favourable rainfall and assistance from the Farmer Input Support Programme. For the 2011/12 lean season, 75,000 people are estimated to be food insecure. Surplus production has ensured that markets are well supplied, with food prices stable compared with the same period in 2010. A prolonged dry spell in Southern, Lusaka, Eastern and Western provinces may affect the current crop season. Rainfall in the first quarter of 2012 will need to be monitored.

ZIMBABWE: The national vulnerability assessment estimated that 12 percent of the rural population were food insecure at the peak of the 2011/12 lean season, a slight improvement compared with the 15 percent in the previous year. Still, about 1 million rural and 400,000 urban residents remain in need of food assistance, the largest number in the region. The improvement is associated with the good 2010/11 maize harvest, the third consecutive annual increase, which was 7 percent better than 2010. Nonetheless, cereal prices are much higher than in 2010. This is partly linked to the imposition of import duties in July 2011 to support local industries. The coming referendum on the constitution and possible presidential and parliamentary elections must be monitored because similar events caused violence and had negative effects on food availability and prices in the past. The outbreaks of water-borne diseases reported in the last quarter of 2011 also require attention.

MOZAMBIQUE: In mid-January 2012, cyclones Funso and Dando affected at least 116,000 people in the mid-coast and southern Mozambique. This number is expected to increase as the assessment of the damage is still ongoing. Cereal production in 2010/2011 was estimated at 5 percent above the previous season and the number of food insecure households fell from around 350,000 in 2010/11 to 250,000 in 2011/12; this figure may have to be revised following the cyclones and floods.

MADAGASCAR: According to the 2011 CFSAM, 592,000 people were at high risk of food insecurity during the 2011/12 lean season. The proportion of food insecure households in the drought-prone south fell from 68 percent to 55 percent as a result of the good 2010/11 harvest, but a dry spell and the damage caused by cyclone Bingiza reduced rice yields in Aloatra-Mangoro. The national meteorology department forecasts an active 2011/2012 cyclone season. Since early January, three tropical storms have caused heavy rainfall and some flooding; so far no major damage has been reported except in Morondava, where 3,000 people are affected by flooding.

MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

FOCUS: Yemen, Syria, Jordan, occupied Palestinian territory, Egypt, Sudan, Tajikistan, Kyrgyzstan and Armenia

YEMEN: Food security is deteriorating as authorities have lost control of Sana'a and other cities. The conflict has caused major internal displacements and disrupted market linkages, income earning opportunities and public services, such as health care, water and sanitation. A recent nutrition survey by the United Nations Children's Fund (UNICEF) indicated alarming rates of acute malnutrition of 31.4 percent among children under-5 in IDP and host communities in Hajjah, one of the most food insecure governorates, and 18.6 percent in conflict-affected Abyan, well above the 15 percent emergency threshold. The country is largely dependent on food imports. Wheat prices in the fourth quarter increased by 29 percent year-on-year. Despite the political transition agreement, the political situation is likely to deteriorate with the approach of the presidential election on 21 February 2012.

SYRIA: Before civil unrest started in March 2011, an estimated 1.4 million food insecure people were already living in areas currently marked by conflict such as Homs, Hama, rural Damascus, Daraa and Idleb. These people have now become even more vulnerable. Livelihoods have been disrupted and food, water and fuel are running short. Families that have lost a breadwinner and traditional vulnerable groups are among the most distressed. Moreover, the 300,000 people in the north-east who suffered four consecutive years of drought and poor harvests are also affected by the interruption of seasonal labour migration to the south and east. The Syrian economy is affected by international sanctions: the price of gasoline has tripled since March 2011, and the currency has depreciated by 35 percent in the last six months according to official rates. The Government recently imposed a 30 percent import tax on Turkish goods, which will put further pressure on prices. The political and security situation is likely to deteriorate in the coming three to six months.

JORDAN: The events in Syria may have negative impacts on the economy. As a net food-importing country, Jordan receives significant amounts of food and other goods through Syria so any disruption of trade could affect the stability of food and non-food prices. So far, prices have remained fairly stable. Jordan has received increasing numbers of Syrian refugees since March 2011. The numbers are still limited, but the situation must be monitored. As a result of the global downturn, public debt increased to alarming levels in 2011. The Government is nonetheless trying to maintain the social safety net programme.

OCCUPIED PALESTINIAN TERRITORY: High levels of food insecurity persist: 33 percent of the population or 1.4 million people were food insecure in 2011. Food insecurity is concentrated in Gaza, with pockets in East Jerusalem, Area C and the Seam Zone. A year after the official "easing" of the blockade, the economic situation in the Gaza Strip has not improved due to regular power cuts, unreliable access to raw materials, reductions of exports and lack of access to the West Bank and Israeli markets. Unemployment, a major driver of social tension, is double than when the Intifada started in 2000. Poor and unevenly distributed rainfall is expected to affect the critical planting period and subsequent crop development. Without economic improvements to lift families out of poverty, the food security situation will remain difficult in the short to medium term.

EGYPT: The 2011 revolution and the resulting instability have led to a serious economic downturn. The Government/WFP food security monitoring system shows that 77 percent of the most deprived households could not meet their essential needs in November: they cope by borrowing money, buying food on credit and rationalizing consumption. The country's ability to import food is slowly eroding because of a 50 percent decline in foreign currency reserves. The food price index for Egypt increased by 12 percent between January and November 2011, but the price for wheat flour remained stable because bread is subsidized. Unemployment increased by 3 percentage points in the third quarter of 2011 compared with 2010. Two-thirds of the 3.2 million unemployed are youth. The political situation remains uncertain, with rising tensions: the second round of parliamentary elections is scheduled to take place before the end of June 2012.

SUDAN: Since the separation from South Sudan in July 2011, the country continues to face humanitarian challenges related to the conflict in western Darfur and to the escalating conflict in border areas with South Sudan, which displaced over 100,000 people. As a result of the secession, Sudan lost about 75 percent of its oil reserves. The IMF estimates that the economy contracted by 0.2 percent in 2011. Rainfall in 2011 was late, short and poorly distributed in many parts of the country. The recent government crop assessment shows that cereal production is less than half of that in 2010; this is reflected in increasing seasonal and year-on-year cereal prices. Continuing conflicts, a poor harvest, increasing food prices and economic recession mean that improvement in the food security situation in the next three to six months is unlikely.

TAJIKISTAN: Access to food is likely to deteriorate during the winter as a result of low wheat production in 2011 estimated at 25 percent less than 2010 and 8 percent below the average of the last four years. The causes include poor rains and electricity failures that affected crop irrigation. Also the unexpected cold weather in Khatlon caused further crop losses. Increases of 60 percent in fuel prices since January 2011 and depreciation of the currency have caused the prices of staple foods to rise. Compared with 2010, the prices of wheat, meat and vegetable oil have increased by around 40 percent; although wheat prices stabilized in late 2011, they are still the highest in Central Asia. Prices are likely to increase further during the winter as more people depend on markets. This trend may be eased by the record wheat harvest in Kazakhstan. Remittances will decrease slightly during the winter season, but in view of positive economic prospects in Russia the inflow of remittances is likely to be sustained for the rest of 2012.

KYRGYZSTAN: Food security is improving as a result of the gradual restoration of livelihoods after the political unrest in 2010. During the post-harvest season in August 2011, 18 percent of households were food insecure compared with 27 percent in August 2010. Food insecurity is likely to increase drastically during the winter: in February 2011, 46 percent of the population were food insecure. The economy is expected to recover in 2012 with 6 percent growth, but this will depend on political stability and economic trends in Russia and Kazakhstan. Despite a serious budget deficit, the Government plans to increase the monthly guaranteed minimum income by 50 percent and pensions by 11 percent in 2012. In the absence of significant adjustments to minimum wages, pensions and allowances, the purchasing power of poor households will continue to be depressed and will affect food consumption.

ARMENIA: Following the 2009 global economic crisis, which caused the economy to shrink by 16 percent, macro-economic conditions are improving: the IMF projects economic growth of 4.6 percent for 2011 and 4.3 percent for 2012. Armenia depends on economic development in Russia because of its reliance on direct investments and remittances: in 2011, remittances increased by 13 percent compared with 2010. Recovery at the household level is lagging behind as many families are highly indebted as a result of the economic crisis. The Government is engaged in structural reforms to reduce current account deficits. Protecting the poor – which make up about one third of the population – during this period of consolidation will be critical.

LATIN AMERICA AND CARIBBEAN

FOCUS: Guatemala, Honduras, Nicaragua, Haiti, Ecuador and Bolivia

GUATEMALA: Tropical depression 12-E affected 249,000 people in October 2011. Most vulnerable group were subsistence farmers, who had already experienced poor harvests in the previous year. The impact on food security will be acute during the lean season starting in March 2012, when household food stocks are exhausted earlier than usual and employment opportunities are scarce. The Ministry of Agriculture and the Secretariat for Food and Nutrition Security estimate that 66,000 households will be at risk of food insecurity. The reduction of chronic malnutrition will be among the top priorities of the government for 2012-2016. Guatemala is one of the three countries with the highest chronic malnutrition rates in the world.

HONDURAS: Tropical depression 12-E affected 150,000 people, caused 29 deaths and damaged 8,000 houses and 31,000 ha of agricultural land. A joint FAO and WFP assessment showed that the floods reduced maize production by 71 percent and bean production by 78 percent in southern and south-western areas. By November 2011, 44,000 households needed immediate food assistance as reserves dwindled; this number is expected to reach 100,000 during the lean season. Acute child malnutrition could increase because the lean season is expected to start in February rather than April in the southern region. Even before the tropical storm in October, 5 percent of children under-5 were already acutely malnourished; the situation will be re-assessed in February.

NICARAGUA: Floods and landslides in several areas threatened livelihoods and damaged infrastructure and crops: in 2011, 130,000 people were affected by floods, compared with 80,000 in 2010. The Pacific and northern region was affected by tropical depression 12-E in October 2011; in December, the North Autonomous Atlantic Region (RAAN) experienced heavy rain causing flooding in poor and isolated indigenous communities. Crop losses and declining food stocks led to high food prices in local markets. The families affected will remain stressed at least until the next harvest season in August 2012.

HAITI: A government-led food security survey in June 2011 showed that two years after the earthquake, 3.9 million people – about half the population – remained food insecure, of whom 840,000 are highly food insecure. An additional 230,000 people could fall into this category as a result of reduced harvests in Centre, Northwest, Northeast and Artibonite departments caused by poor rainfall, and livestock losses in the north-east caused by a protracted drought. The cholera outbreak in October 2010 has affected more than half a million people and caused 7,000 deaths. Households continue to suffer from increased health costs and reduced incomes. The worst off are families who have lost the main breadwinner.

ECUADOR: Natural disasters affecting the lives and livelihoods of 80,000 people in the second half of 2011 included a landslide in Sucumbios province in July, prolonged drought in the northern province of Carchi, heavy rainfall and floods in Napo in September, and volcanic ash eruptions that damaged 500,000 ha of land in Tungurahua and Chimborazo provinces in November. In addition, the Northern Province continues to be affected by the negative spill-over effects of the armed conflict in Colombia. High food prices reduced household purchasing power because the average wage remained 14 percent below the cost of the basic food basket. The Government responded with an increase to the minimum monthly salary. La Niña may cause heavy rainfall in inland regions during the first semester of 2012 and the situation must be monitored.

BOLIVIA: Drought brought on by La Niña affected winter crops in the second semester of 2011. Wheat production was 40 percent and maize production 35 percent below targets, but this situation was offset by increasing food imports during 2011. The drought is likely to affect summer production of maize because planting in some regions shifted from November/December 2011 to January 2012. Low wheat and maize production in 2011 is likely to result in higher food prices in 2012, which will disproportionately affect the urban and rural poor.

ASIA

FOCUS: the Philippines, Cambodia, the Lao People's Democratic Republic, Myanmar, Indonesia, Democratic People's Republic of Korea, Afghanistan, Pakistan, Nepal, Bangladesh and India

THE PHILIPPINES: The country is regularly affected by typhoons and torrential rains. Tropical storm Washi caused floods and landslides in the Mindanao islands in December 2011, destroying 48,000 homes, displacing 450,000 people and causing 1,200 deaths. In total, 1.1 million people were affected. The risk of water-borne diseases, especially in evacuation centres, requires immediate attention to prevent an increase in acute malnutrition. Food and other goods are available, but access is limited because livelihoods and incomes have been disrupted. The scale of humanitarian requirements is overwhelming local capacity, and additional support is required. WFP and partners will carry out a more in-depth assessment in early 2012. Weather forecasts indicate continuing wet conditions for the next four months – usually the drier period within the year – which may affect the early stages of the next cropping season starting in April 2012. Rainfall is expected to normalize at the start of the rainy season in May/June 2012.

CAMBODIA: Flooding of the Mekong and Tonle Sap rivers in September and October 2011, the worst since 2000/01, caused major damage to rural infrastructure and housing in 18 provinces. The National Committee for Disaster Management reported that 250 people died and 45,000 households were displaced; in total 330,000 households were affected. FAO revised its projection for the main wet season paddy crop down to 6.4 million mt, 2.8 percent less than in 2010. Rice prices increased by 18 percent between the third and fourth quarters of 2011, with a peak in November when the year-on-year increase was 30 percent. Forecasts of above average rainfall in the coming months should lead to good conditions for the next land preparation and sowing season starting in April 2012.

LAO PEOPLE'S DEMOCRATIC REPUBLIC: Serious flooding from June to August 2011 caused by tropical depressions Haima and Nock Ten affected 430,000 people in the central and southern regions and destroyed agricultural land, rural infrastructure and housing. An inter-agency assessment reported that food shortages were not an immediate concern and that support should focus on agricultural rehabilitation except in Khammuane province, which suffered the greatest losses. Food assistance was provided for 36,000 people in the most affected communities. A recent assessment shows that villages along the Xe Bang Fai river are expected to become highly food insecure from April 2012 as they run out of rice provided earlier. Response options are being discussed.

MYANMAR: Heavy rains and severe flooding in the central region in October reduced the main rice harvest; FAO revised its output forecast for 2011 to 30 million mt, 3 percent less than the good harvest in 2010. Food price inflation remained low, and nominal rice prices declined slightly from 2010 levels. Parts of the country were affected by shocks that had an impact on the food security situation: insecurity hindered farming activities in Kachin state, erratic and heavy rains affected the harvest in Chin state and a tropical storm caused flash floods in the Dry Zone. Food access is also a concern in several townships in Northern Rakhine state, Northern Shan state and Magway, which have been areas of concern for most of 2011 because wage labour incomes are insufficient to afford the basic food basket.

INDONESIA: The Ministry of Agriculture estimates that the 2011 paddy harvest will decline by 1.6 percent compared with 2010 as a result of a late start to the season, irregular rainfall and plant diseases. The price of rice in December 2011 was 15 percent higher than in the same season in 2010: this is a concern for poor households, which spend 20 percent of their income on rice in the November-February pre-harvest period. The food security situation is stable, but chronic food insecurity is a concern in eastern areas such as Nusa Tenggara Timur and Papua provinces where 40 percent of the population live below the national poverty line in comparison to 13 percent at national level; 58 percent of children under-5 in Nusa Tenggara Timur and 48 percent in Papua are chronically malnourished.

DEMOCRATIC PEOPLE'S REPUBLIC OF KOREA: After the 2010/11 crisis caused by the reduction in bilateral food assistance and a failed spring harvest, the joint FAO/WFP CFSAM projected the October 2011 harvest to be 8.5 percent higher than the revised figure for the 2010/11 production. This will improve food security to some extent, but another year of food deprivation is expected due to the remaining production deficit for 2011/12 and the Government's inability to close the food gap with imports. International food assistance will continue to be needed, especially by the most vulnerable groups who are dependent on the public distribution system. Conditions in the coming months must be monitored with a view to projecting the June 2012 harvest: current forecasts indicate a mild winter and spring, so no major impacts on crops are expected at this stage.

AFGHANISTAN: A Food Security and Agriculture assessment indicated that 2.6 million people in the north, north-western and central highlands were severely food insecure and in need of food assistance from October 2011 onwards as a result of the drought in early 2011. The Ministry of Agriculture, Irrigation and Livestock estimates that wheat production in 2011 will be 25 percent less than in 2010 and 36 percent less than the good harvest in 2009; as a result, 2 million mt of cereals will have to be imported in 2011/12. Nominal wheat prices in the fourth quarter of 2011 were 24 percent higher than in the same season in 2010; this situation may be mitigated by imports from Pakistan and Kazakhstan, which had very good wheat harvests. Food insecurity will last in the drought affected northern provinces until the next harvest expected to start in May 2012. Rainfall in the 2011/12 winter cropping seasons was mixed: favourable early rains in October and November were followed by dry weather in December and moderate rainfall in January. Forecasts indicate moderately dry and warm conditions in the next three months.

PAKISTAN: Monsoon rains in August and September 2011 caused severe flooding in most of Sindh and parts of Balochistan provinces for the second year in a row. An interagency needs assessment in October 2011 showed that over 5 million people were affected, of whom 2.5 million were severely food insecure. In October, humanitarian efforts were ongoing but remained underfunded. The cold weather in the winter months and the prevailing overall poor health situation of the flood-affected people due to inadequate shelter, food, safe water and sanitation are posing multiple health hazards. Despite the floods, Pakistan benefited from a record wheat and good rice and maize harvests in 2011. Wheat crops reached a record of 24 million mt, 4.2 percent higher than the above average output in 2010.

NEPAL: Food availability is favourable following a record summer harvest. The Ministry of Agriculture and Cooperatives (MoAC) reported that paddy production was 14 percent higher than in 2010/11; maize production was 5 percent higher. The MoAC/WFP/FAO joint crop assessment indicated an increase of 12 percent in winter wheat compared with 2010/11. Prospects for the next winter crops are good in view of the extended monsoon and timely rainfall in 2011. The price of coarse rice fell slightly from 2010 levels, but excessive rainfall, landslides, floods, gales, pest infestations and hailstorms between July and November 2011 in western hill and mountain areas left 500,000 people acutely food insecure.

INDIA: In September 2011, heavy rains and floods in Orissa state affected more than 2.2 million people according to government reports: the most vulnerable groups were about 250,000 children and pregnant and lactating women, who were in immediate need of nutritious food. The first projection of the kharif (monsoon) crop, cultivated during October to January, indicated an increase in production by about 3 percent compared to the previous year's harvest. The Government has prepared a draft food security bill to support the poor with highly subsidized food grains. A revamp of the existing social safety net is critical: despite impressive economic growth over many years (7.4 percent in 2011) and the world's largest food based safety net, 42 percent of the Indian population live on less than USD 1.25 per day and more than 2 out of 5 children under-5 are underweight.

BANGLADESH: A recent WFP assessment showed that 49,000 households affected by coastal floods in July/August 2011 still need recovery assistance; there are also reports of deteriorating nutrition among children under-5 and pregnant and lactating women. The floods displaced many people, disrupted livelihoods and damaged crops and housing. In December half of the agricultural land was still inundated which is unusual as floods normally recede within weeks. Despite the floods, rice production in the 2011 *aman* (November/December) season reached record levels; FAO projected that rice production in 2011 would be 3 percent more than the record output in 2010.

Acronyms

CAP	Consolidated Appeal Process
CFSAM	Crop and Food Security Assessment Mission
CILSS	Comité permanent Inter-États de Lutte contre la Sécheresse dans le Sahel / Permanent Inter-State Committee for Drought Control in the Sahel
DPRK	Democratic People's Republic of Korea
DRC	Democratic Republic of the Congo
FAO	Food and Agriculture Organization of the United Nations
FEWS-NET	Famine Early-Warning Systems Network
FSNAU	Food Security and Nutrition Analysis Unit
FSNWG	Food Security and Nutrition Working Group
GIEWS	Global Information and Early-Warning System
IDP	Internally displaced person
IMF	International Monetary Fund
IPC	Integrated Food Security Phase Classification
MoAC	Ministry of Agriculture and Cooperatives of Nepal
mt	Metric ton
NOAA	National Oceanic and Atmospheric Administration
OCHA	Office for the Coordination of Humanitarian Affairs
oPt	occupied Palestinian territory
RAAN	North Autonomous Atlantic Region
SADC	Southern African Development Community
SNNPR	Southern Nations, Nationalities and People's Region
UNICEF	United Nations Children's Fund
VAC	Vulnerability Assessment Committee
VAM	Vulnerability Analysis and Mapping
WEO	World Economic Outlook
WFP	World Food Programme



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WFP: www.wfp.org/food-security

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BMZ  Federal Ministry
for Economic Cooperation
and Development