



World Food Programme

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Global Food Security Update

TRACKING FOOD SECURITY TRENDS IN VULNERABLE COUNTRIES

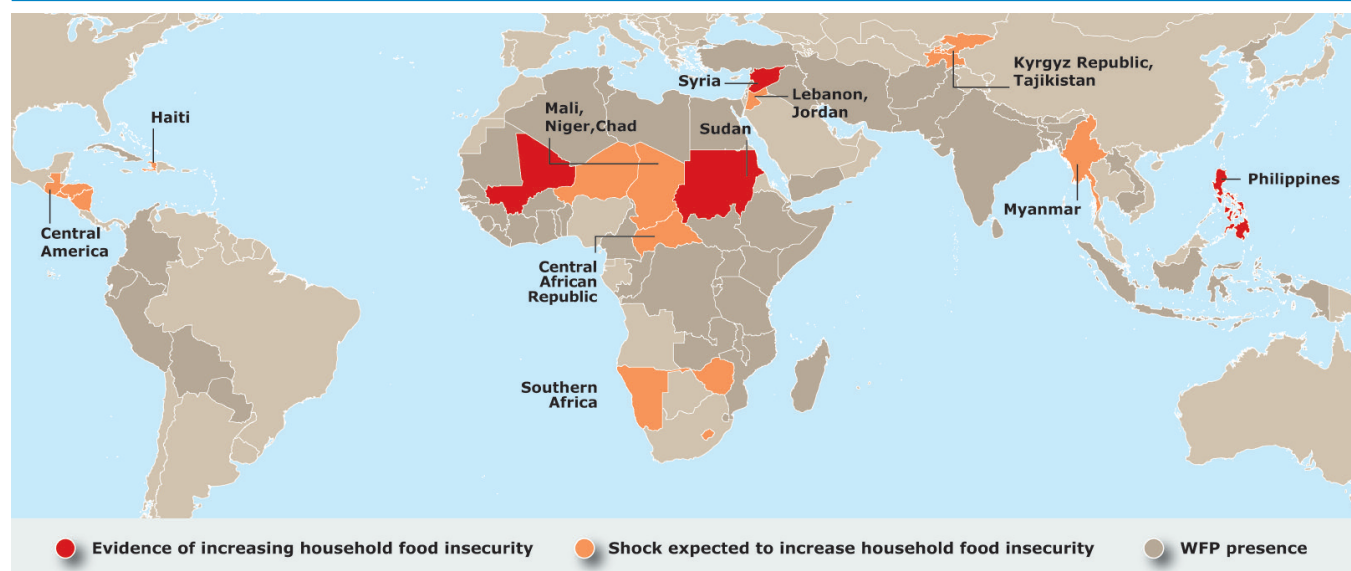
The Global Food Security Update provides a quarterly overview of key food security trends in vulnerable countries. Information is provided by WFP VAM field teams and partners.

In focus

- Food security levels are generally better than a year earlier in **East Africa** and the **Sahel**, with most areas facing either IPC phase 1 'minimal' or phase 2 'stressed' conditions, thanks to favorable agro-climatic conditions in 2012.
- Due to high levels of insecurity, pockets of IPC phase 4 'emergency' food security conditions persist in areas of **South Sudan's** Jonglei state, and in local areas in northern **Mali**. Parts of Mindanao province in the **Philippines** will also face phase 4 'emergency' conditions, following the impacts of Typhoon Bopha. IPC phase 3 'crisis' food insecurity prevails in parts of **Haiti** due to weather-related shocks in 2012.
- The escalating conflict in **Syria** continues to lead to displacement and re-displacement of people. According to UNHCR, 4.25 million people are displaced and some 1.38 million people have fled to neighboring countries. Inside Syria, the food security situation is worsening; OCHA estimates that 6.8 million Syrians are in need of humanitarian assistance. The surge in refugee numbers is stretching host government capacity in **Jordan** and **Lebanon**. The conflict is also disrupting agricultural markets and trade in neighboring countries.
- Renewed conflict in **Sudan's** Darfur region and in the **Central African Republic** has caused new population displacement. Dryness and conflict are causing deterioration in food security conditions in parts of **Myanmar**.
- High wheat prices are undermining poor household's food access in **Afghanistan, India, Kyrgyz Republic** and **Pakistan**. As the lean season approaches, unusually high coarse grain prices are eroding pastoralist terms of trade in **Niger**.
- Coffee rust and lower coffee export prices are undermining rural employment in **Guatemala** and **Honduras**, impacting food access for households that rely on casual labor.
- Severe flooding in **Colombia** and **Peru** has caused displacement and damage to crops.
- Drought in parts of **southern Africa** has impacted crop development and may drive food price increases in the region.

Key trends in food security

FEBRUARY – APRIL 2013



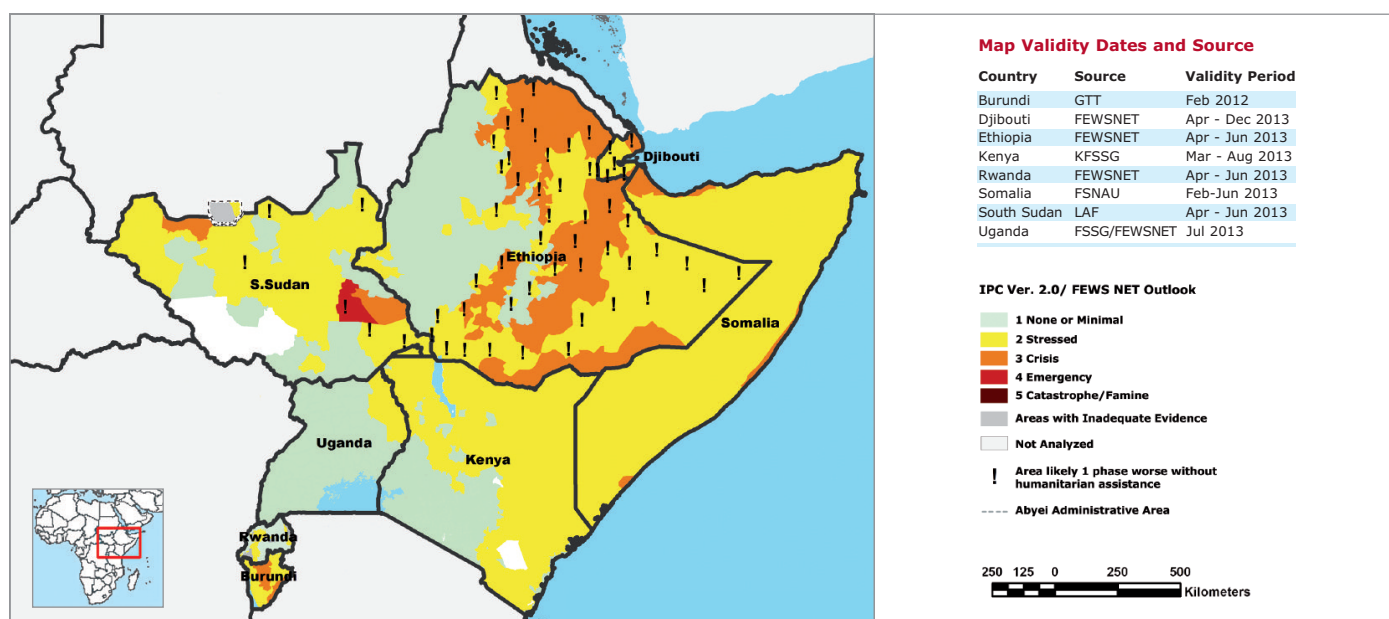
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Regional highlights

EAST AND CENTRAL AFRICA

- Household food security has generally improved through the last quarter of 2012 and early 2013 thanks to favorable seasonal conditions. Nonetheless, according to IPC analyses in the region, 2.4 million people in **Ethiopia**, 1 million in **Somalia**, 1.2 million in **South Sudan** face phase 3 'crisis' or phase 4 'emergency' food security conditions. Also, according to the short rains assessment conducted in January and February 2013, around 1.1 million people in **Kenya** are food insecure.
- Phase 4 emergency conditions remain in effect in eastern areas of South Sudan (Jonglei state) due to high levels of insecurity and cattle rustling. Phase 2 'stressed' and 3 'crisis' persist in Somalia, **Djibouti**, North-Eastern and coastal Kenya, Karamoja (**Uganda**), central and eastern Ethiopia, and northern and eastern states of South Sudan.
- The IPC analysis conducted in South Sudan in March presents a decrease of zones previously under phase 3 'crisis' that shifted to a more moderate IPC phase 2 'stressed'. This was mainly due to good 2012-2013 harvests that helped minimize the impacts of the dry season. Other important factors include the strengthening of the local currency from the resumption of oil transit through the northern border, and the resumption of cross-border trade due to improved security in the north.
- Food prices are following seasonal trends in most parts of the region. Coarse grain prices further declined in February and March with recent harvests entering the markets, notably in Rwanda, Somalia and Burundi. However, moderate increases of coarse grains prices were registered in South Sudan, Sudan, and parts of Ethiopia. Slight increases of staple food prices in main exporting countries in the region, including in Uganda, are likely to affect the main destination markets over the next months, and notably South Sudan, Djibouti, Somalia and Kenya.
- Above-normal rainfall since April resulted in a rapid improvement of vegetation and grazing resources across wide areas of the Horn. The Lake Victoria basin and an area including north-eastern Kenya, southern Somalia and Somali region of Ethiopia have experienced flooding. In Kenya, flooding has damaged crops and caused displacement. However, significant concerns persist notably in Ethiopia where *Belg* crop production is projected to be below average as a result of delayed rains and planting, and the high risk of crop damages by future *Kiremt* rains.
- Normal to above normal March-June rainfall in central and eastern part of the region should underpin food availability and favorable food security trend over the next months, including in most pastoralist areas of the Horn of Africa.

Food Security and Nutrition Conditions (April 2013)



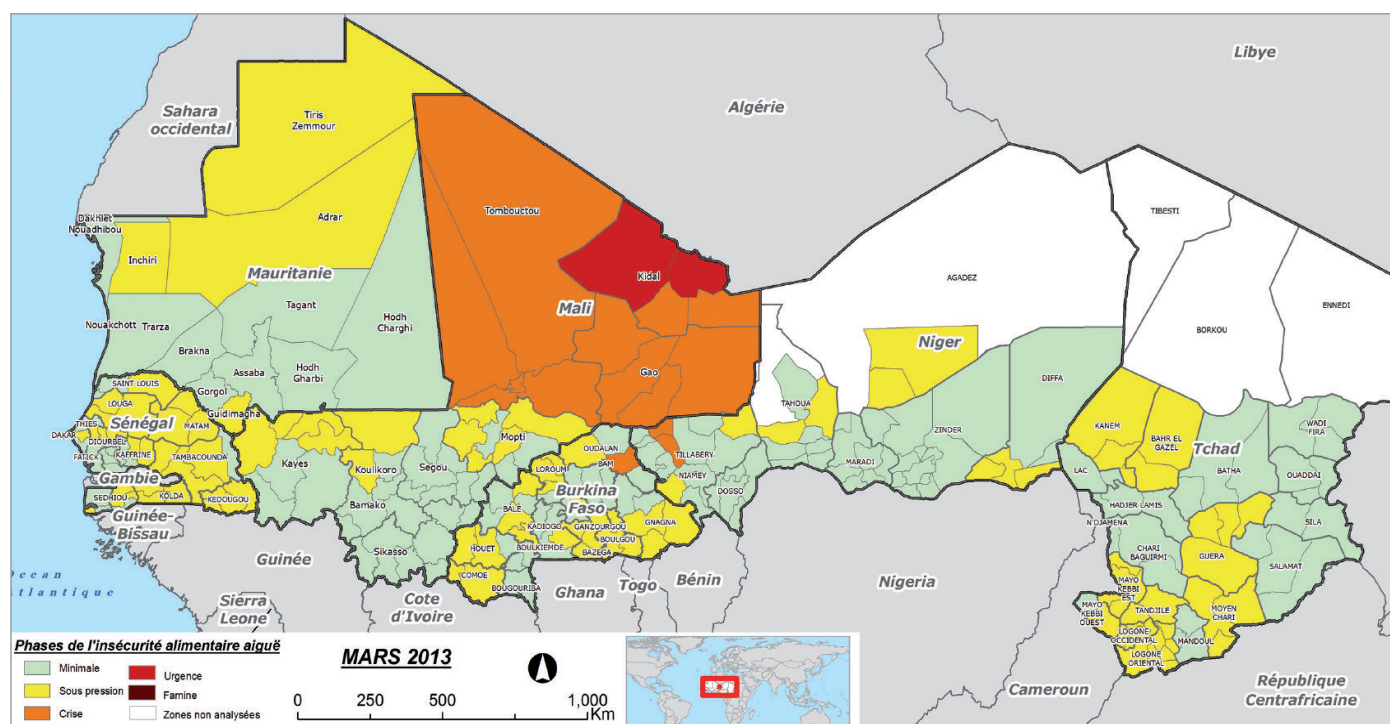
Source: Regional FSNWG, IPC country teams and FEWS NET.

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WEST AFRICA

- Although the 2012-2013 harvest was above average, food insecurity persists in agro-pastoral and pastoral areas, due to the aftermath of the 2012 crisis, insecurity and high food prices.
- In Northern **Mali**, conflict continues to disrupt food security conditions. According to the April round of the *Cadre Harmonisé*, food security conditions are at phase 3 'crisis' levels in the north, with pockets of phase 4 'emergency' in remote areas of Kidal, where insecurity is very high. The entire north (regions of Gao, Kidal and Tombouctou) will face phase 4 emergency conditions during the May to July lean season, should insecurity continue to disrupt pastoralist livelihoods. Phase 2 'stressed' conditions are expected in agro-pastoral areas of **Chad**, **Mali**, **Niger**, and **Senegal**.
- Due to violence in Central Darfur, an influx of some 40,000 refugees and returning migrant workers has been received in Chad. According to UNHCR, in the **Central African Republic**, conflict has prompted over 45,000 people to flee the country, mostly to the Democratic Republic of Congo. Looting continues to take place and food prices are significantly above last year's prices in the capital Bangui. Conflict-related trade disruption and insecurity are expected to lead to greater food insecurity conditions and to an impact on the 2013 crop. As of November 2012, prior to the conflict, the entire country was facing IPC phase 2 'stressed' or phase 3 'crisis' conditions.
- Coarse grain prices in **Niger** and **Nigeria** are unusually high, with millet prices 15% above last year's crisis levels in the capital of Niger. The impacts of flooding and insecurity in Nigeria are driving high grain prices. In addition to Niger, Chad, Benin and Northern Cameroon are also likely to be affected, due to their market linkages with Nigeria. As the lean season approaches, high food prices will negatively impact household food access.
- According to the seasonal forecast circulated by CILSS, a late to normal start of the 2013 cropping season is expected in the humid zone of West Africa (south west Nigeria, southern parts of Benin, Togo and Cote d'Ivoire, south-east Liberia and Guinea).

Acute food insecurity phases, March 2013



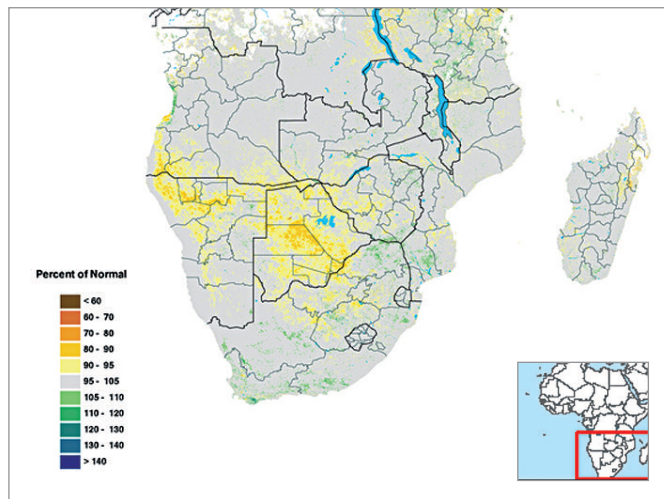
Source: Cadre Harmonisé, CILSS.

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SOUTHERN AFRICA

- In the **Democratic Republic of Congo**, IPC analyses show that 6.4 million people are under phases 3 'crisis' and 4 'emergency', mainly due to conflict impacts in the East. In **Mozambique**, IPC phase 2 'stressed' conditions are expected in Chokwe, Chibuto and Guja districts following flooding earlier in the year.
- An in-depth assessment conducted in Madagascar in March determined that 17% of households are severely food insecure in areas affected by tropical cyclone Haruna. Another 34% are moderately food insecure. The storm, which made landfall in February, affected some 44,000 households and damaged crops.
- In **Malawi**, the devaluation of the Kwacha has resulted in widespread food price hikes and deteriorated purchasing power. Prices of maize, the main staple, are showing unprecedented increases. Simultaneously, low strategic grain stocks are contributing to lower levels of maize availability on the market. Social unrest has increased, despite efforts to cushion the impact of higher prices.
- Large rainfall deficits resulting from prolonged dry spells in **Botswana**, **Namibia**, southern **Angola**, southern **Zimbabwe** and northern/central **South Africa**, have reduced crop yields and have had negative impacts on pasture conditions. In South Africa, crop estimates released in late March were revised downwards by 5% for the commercial crop, due to the dry spells. Meanwhile, rainfall deficits are also observed in **Zambia** and **Lesotho**. Maize prices are decreasing in producer markets as the 2013 main harvest has commenced and the first crops began to

Anomaly in vegetation: percent of normal NDVI, April 24 -30, 2013



Source: USGS/EROS, USAID, FEWSNET.

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improve market supplies. Yet, following the prolonged dry spell, concerns are that lower levels of production in 2013 may put upward pressure on maize prices in South Africa and other markets in the region.

- The seasonal assessments by national Vulnerability Assessment Committees (VAC) will illustrate the extent of household food security impacts.

MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

- In **Sudan's Blue Nile State**, for the first time after conflict erupted in September 2011, inter-agency assessments started in March 2013. According to the results close to 84,000 people are in need of food assistance due to loss of assets and displacement. Other contributing factors include past disruptions to farming, limited opportunities to earn income, and low levels of humanitarian assistance due to limited access.
- The conflict in **North Darfur** has had a serious impact on food access as supply roads have been blocked. Overall, much of the harvest in the area has been damaged and loss of livestock reported. Fighting in **East Darfur** in April has caused displacement to over 36,000 people.
- As international wheat prices decline, domestic wheat prices are easing in import-dependent **Yemen**. From February to March, the average nominal retail price of wheat and wheat flour reduced by 3% and 2% respectively. Wage to wheat terms of trade improved by 2% in March, while sheep to wheat terms of trade increased by 12%.
- In **Kyrgyz Republic**, food prices remain at high levels. As of March 2013, wheat prices have increased by 56% in rural and 48% in urban areas, compared to June 2012. Food insecure households continue to cope with higher wheat prices by reducing their consumption of vegetables, meat and eggs. According to official reports, cropping started earlier this spring and area planted has increased.

IN FOCUS: SYRIAN CRISIS

The escalating conflict in Syria continues to lead to displacement and re-displacement of people. According to UNHCR, 4.25 million people are displaced and some 1.38 million people have fled to neighboring countries. The surge in refugee numbers is stretching host government capacity, especially in Jordan and Lebanon. Inside Syria, the food security situation is worsening. OCHA estimates that 6.8 million Syrians are in need of humanitarian assistance.

Availability and access to food continue to decline, as the country undergoes serious obstacles on its capacity to generate income from exports and to import critical inputs for the production sector. As a consequence of the ongoing conflict and destruction of infrastructure, exports went from US\$ 11.35 billion in 2010 to only US\$ 185 million in 2012. The industrial sector is not producing, services sector is hampered and agriculture sector continued to contract.

The results of the above are a reduction on food availability at national and household level, as well as poor access to food due to lack of income. Markets and the supply chain are disrupted and those functioning are unpredictable. The conflict has precipitated a drop in agricultural trade and a change in trading routes in the region, with impacts on livelihoods. Increased costs of trade are impacting agricultural input supply chains. Disruptions are also affecting market chains that smallholders rely upon to sell produce. While food is available in some locations, sharp increases in food prices are of concern. WFP market monitoring in Syria in March 2013 showed that national average retail prices had experienced substantial year-on-year increases for rice 39%, bread 104%, sugar 10% and vegetable oil 45%.

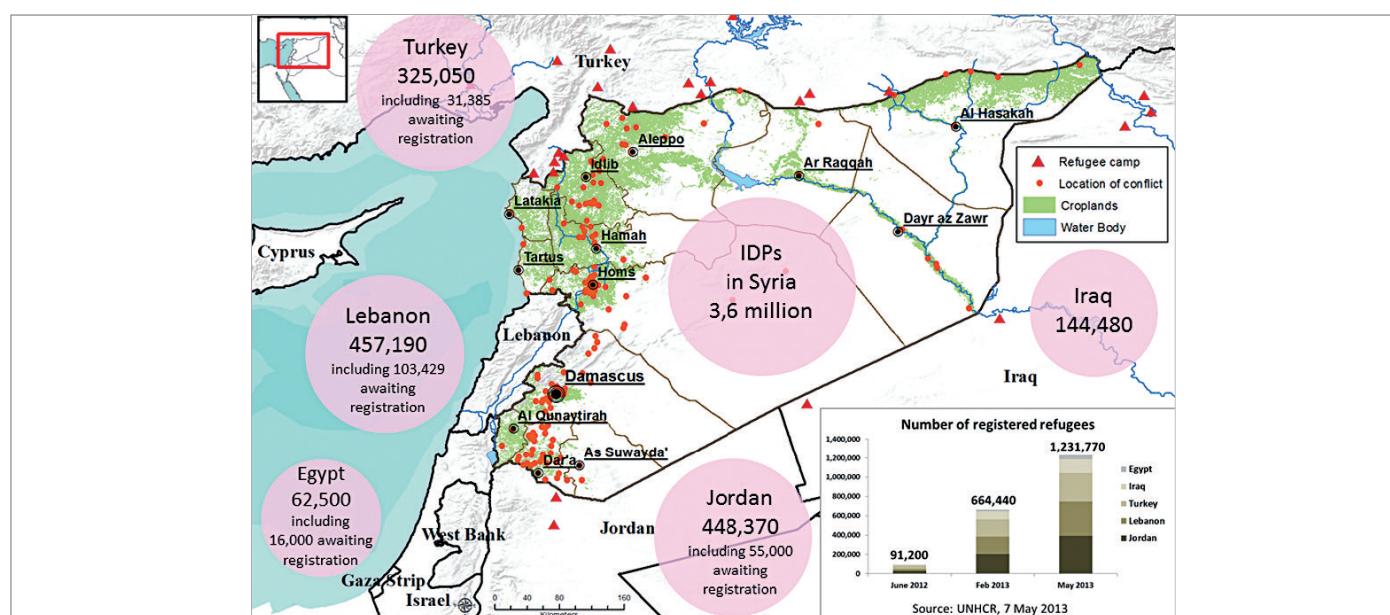
Prospects for the upcoming agricultural season are bleak due to low precipitation in March and delays in April rainfall, as well as disruption of agricultural activities. The ministry of Agriculture estimated recently a decline of 20% in the planted area, not to mention the farms that have been abandoned. Active farmers are experiencing shortages and high cost of agriculture inputs including labor, diesel and fertilizer. The livestock sector has also been adversely affected by costly animal fodder and limited veterinary supplies and services.

The non-UN Joint Rapid Assessment of Northern Syria (JRANS) carried out in Aleppo city in March 2013 highlights a deteriorating situation in parts of the governorate. The JRANS, which was supported by DFID, ECHO, and USAID reported that 2.2 million people are borderline food insecure, out of an estimated 2.5 million people in the city. Elsewhere in Daraa governorate, a quick consultation by WFP confirms that the population is concerned that markets may not be sufficiently stocked or fully functional. Commercial food trucks have been unable to move food into the main markets of the governorate since March 2013 due to insecurity.

WFP currently provides food assistance to nearly 2 million people in all 14 governorates in Syria and will progressively scale up to reach 4 million people during the last quarter of 2013.

The Syrian conflict is affecting food systems and agricultural livelihoods in neighbouring countries. According to a regional FAO assessment in February 2013, the Syria conflict has precipitated a drop in agricultural trade and a change in trading routes in the region, with impacts on livelihoods. Increased costs of trade are impacting agricultural input supply chains. Disruptions are also affecting market chains that smallholders rely upon to sell produce. Two thirds of the refugees and returnees from Syria are living in host communities that are facing fragile food security prospects and increased strains on housing and health care sectors. Increased competition for work opportunities has also resulted in reduced household incomes in host communities.

Syria and neighbouring countries: geography of conflict



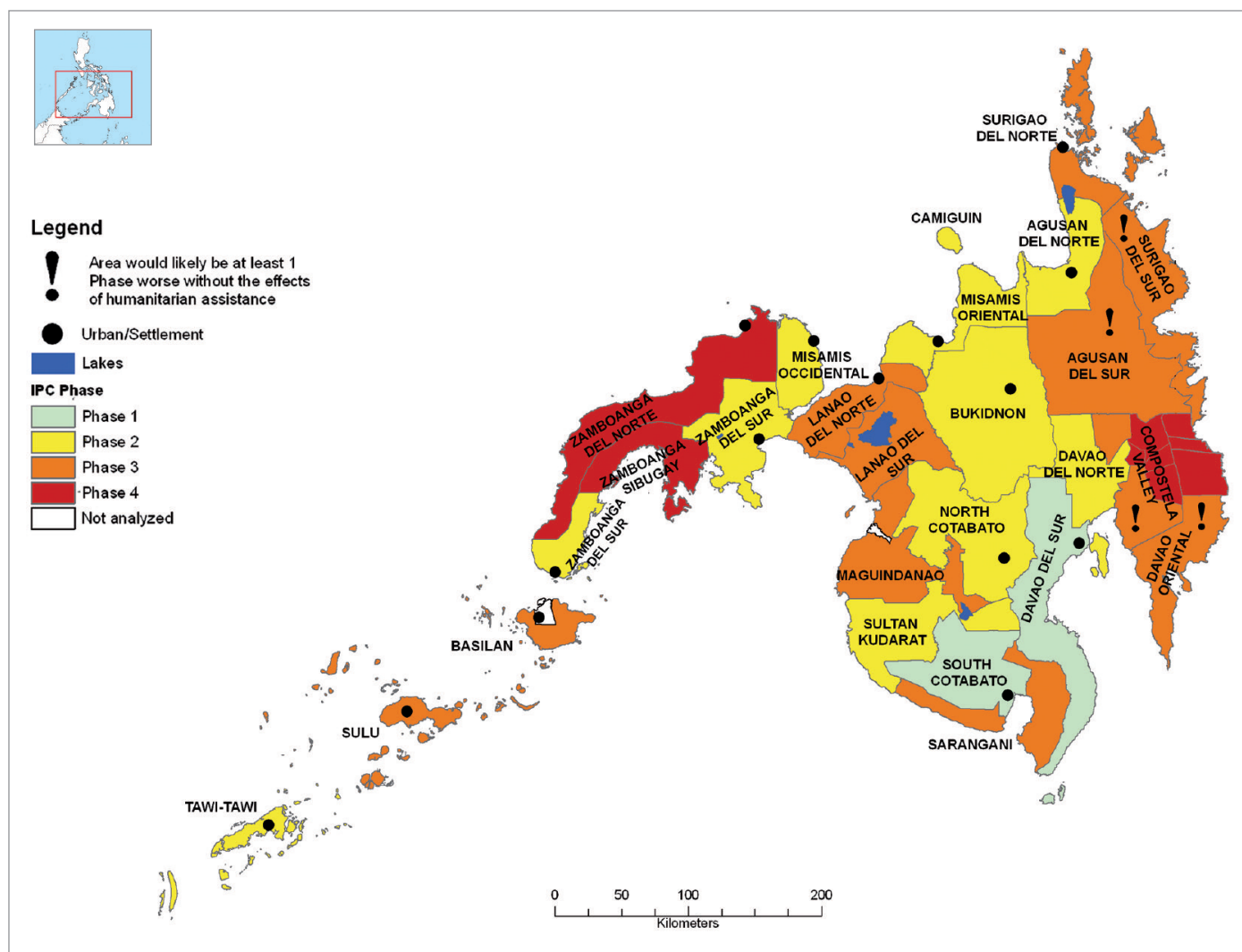
Source: WFP, UNHCR.

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ASIA

- Rice prices have generally remained stable in the region, due to the secondary harvest. Climatic conditions have been favourable for rice for three consecutive years in Asia's main rice-producing countries. Government rice stocks are substantial in **India** and **Thailand**. Meanwhile, wheat prices are above average, in line with global prices. Although wheat and rice stocks continue to be at record levels in India, prices in the country continue increasing.
- In **Afghanistan** WFP monitoring shows nominal cereal prices remain above the five year average. Prices are above the five year average for wheat (+15%), wheat flour (+32%) and low- quality rice (+50%). In **Pakistan** wheat prices have increased faster than wage rates, driving down wage laborer's terms of trade.
- The IPC round conducted in the **Philippines** in January 2013 determined that 2 provinces were under IPC acute phase 4 'emergency' food security conditions, 9 in phase 3 'crisis', 12 in phase 2 'stressed'. The provinces with high levels of acute food insecurity are mainly located in Region IX (Zamboanga Peninsula), in ARMM (Autonomous Region in Muslim Mindanao) as well as in the natural disaster prone belt along the east of Mindanao and in Lanao del Norte. In these areas, livelihoods have been seriously eroded due to Typhoon Bopha, as coconut and banana groves were damaged and commercial and agricultural companies have closed or stopped operations. The contribution of various forms of wage and salary income to households' livelihoods has tumbled, declining by more than half in the worst-affected areas.

IPC Food Security and Nutrition for Mindanao, Philippines, January 2013



Source: IPC country team.

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IN FOCUS: FOOD SECURITY DETERIORATES IN PARTS OF MYANMAR

The food security situation remains a concern in both Kachin and Rakhine states, as conflict and communal violence continue to impact well-being and livelihoods. In Kachin, close to 90,000 people remain displaced, 10-20% of which are receiving little, if any, assistance. In more remote camps in non-government controlled areas, recent anecdotal reports suggest high levels of acute malnutrition among children and corresponding increases in infant mortality. Confirmation of such reports is not possible as these camps remain inaccessible to the international community. In Government-controlled areas, by contrast, the food security situation in IDP camps is largely stable, with levels of food and cash assistance sufficient to maintain adequate diets.

The protracted situation in Rakhine is leading to high levels of food insecurity among both displaced and non-displaced populations. IDPs remain reliant on food assistance, as most continue to face movement restrictions and decreased livelihood opportunities. Child malnutrition in camps remains a serious concern, with a December survey by Save the Children in Sittwe township finding 14% of children to be acutely malnourished, with close to 5% severely so. As many IDPs reside in flood prone areas, the situation is expected to worsen with the coming rains. Overall, 13 camps have been identified as at particular risk, with coming floods likely to trigger outbreaks of the water-borne diseases and increases in malnutrition. Non-displaced populations in Rakhine are also facing acute food insecurity. Crop production is reduced, as farmers remain unable to cultivate all farming lands or access agricultural inputs. Income from crop sales is reduced as low purchasing power has driven down demand and thus prices. As a result, low and high-quality rice prices are 17 and 12% lower, respectively. In May, WFP will initiate cash-for-work programmes in the hardest villages in Sittwe township to stimulate local markets and provide work opportunities.

In parts of Myanmar's Dry Zone, rainfall deficiencies in the early and late monsoon seasons have impacted key crop harvests and resulted in water shortages. Yenangaung and Chauk are amongst the hardest hit townships, with reports of groundnut, sesame and pigeon pea failures and multiple reports of premature depletion of many "rainwater collection ponds". As a result, the food security situation as well as the health and well-being of communities are deteriorating. WFP anticipates further deterioration as the summer season progresses.

LATIN AMERICA AND CARIBBEAN

- A severe coffee rust outbreak is currently affecting Central America, particularly **El Salvador, Guatemala, Honduras** and **Nicaragua**. The International Coffee Organization estimates that production is likely to decline by up to 15-25% in 2012/13 and 30-40% in 2013/14 compared to 2011/12 levels, with losses of US\$550 million for the 2012/13 season. Export prices are also expected to decline following a 35% reduction international prices of Arabica coffee in 2012. The coffee industry in Central America is one of the most important economic sectors and generator of unskilled labor jobs. The negative impact of the coffee rust on the production and labor demand is likely to reduce household food access and increase vulnerability to food insecurity. There is a concern about the upcoming 2013/14 harvest season, when the situation is expected to worsen.
- In **Haiti**, according to the national food security council, several districts are facing IPC phase 3 'crisis' conditions, due to protracted shocks in 2012 and a longer than usual dry season in 2013. These areas include Nord-Ouest, Artibonite, Centre, Grande Anse, and Sud-Est provinces. Out of 1.5 million severely food insecure people, 800,000 people are in need of urgent assistance. As of March 2013, 320,000 people remained internally displaced due to the cumulative effect of the 2011 earthquake, the cholera outbreak, and hurricane Sandy, according to OCHA. The spring agricultural campaign has been delayed due to late rains. Access to local products is limited and is expected to remain as such until next harvest in June. The price of imported commodities has tended to remain stable.
- Heavy rainfall during January-February 2013 caused severe flooding of the San Juan del Oro River and its tributaries in South-western **Bolivia**. The departments of Potosí, Tarija and Chuquisaca were most affected. The floods damaged crops and small irrigation and drinking water systems, roads, houses and even railroads. Subsistence farmers who normally cultivate crops at the riversides were most affected. The floods hit at the end of the lean season, as farmers were about to harvest their crops and their food reserves were at the lowest. Families that traditionally store their harvested potatoes and onions in the fields also lost these reserves.
- Heavy rainfall has resulted in massive floods destroying crops, infrastructure and isolating communities in **Peru** and **Colombia**. According to the UN country team in Peru, there are approximately 190,723 affected people and 17,823 hectares of crops that have been destroyed. The districts of Cusco and Arequipa in Peru remain in State of emergency due to floods and landslides. The Government of Colombia informed there are approximately 62,340 affected people due to severe flooding and a National State of Emergency has been decreed in the department of Choco.
- The upcoming 2013 hurricane season is expected to be an above-average season due to an anomalously warm tropical Atlantic and a relatively low likelihood of El Niño.



Acronyms

CILSS	Comité inter-États de lutte contre la sécheresse au Sahel	JRANS	non-UN Joint Rapid Assessment of Northern Syria
DFID	Department for International Development	MUAC	Mid-Upper Arm Circumference
ECHO	European Commission Humanitarian Aid and Civil Protection	OCHA	United Nations Office for the Coordination of Humanitarian Affairs
FAO	Food and Agriculture Organisation of the United Nations	SNNPR	Southern Nations, Nationalities, and Peoples' Region
FSNWG	Food Security and Nutrition Working Group	UNHCR	United Nations High Commissioner for Refugees
FEWSNET	Famine Early-Warning Systems Network	USAID	United States Agency for International Development
FSMS	Food Security Monitoring System	VAC	Vulnerability Assessment Committees
IDP	Internally displaced person	VAM	Vulnerability Analysis and Mapping
IPC	Integrated Food Security Phase Classification	WFP	World Food Programme

Information sources

FAO: www.fao.org	IPC: http://www.ipcinfo.org/
FEWS-NET: www.fews.net	OCHA: http://www.unocha.org/
FSNAU: http://www.fsnau.org/	UNHCR: www.unhcr.org
FSNWG: http://www.disasterriskreduction.net/fsnwg	WFP: http://www.wfp.org/food-security

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Spain supports the preparation of the Global Update.



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