



World Food Programme

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Global Food Security Update

TRACKING FOOD SECURITY TRENDS IN VULNERABLE COUNTRIES

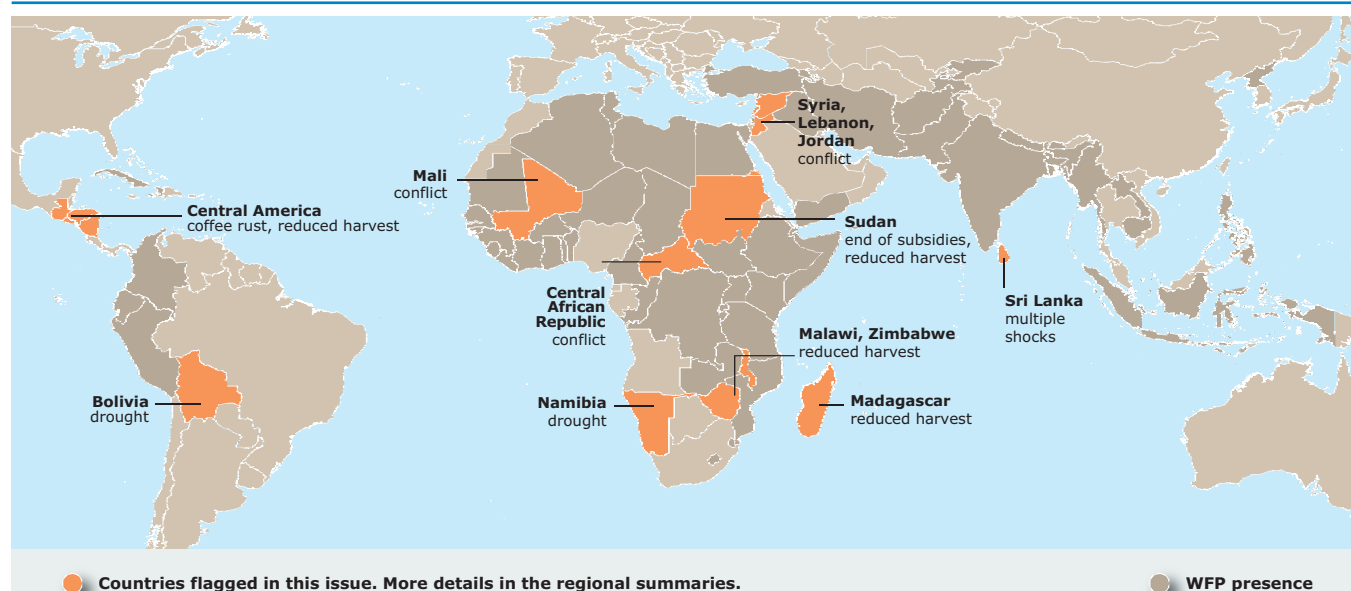
The Global Food Security Update provides a quarterly overview of key food security trends in vulnerable countries. Information is provided by WFP VAM field teams and partners.

In focus

- In **Syria**, revised estimates indicate that the number of IDPs has risen to 6.5 million from 4.25 million in July. Vulnerability is increasing due to conflict, reduced economic activity, reduced crop production and high prices. As of October, UNHCR reports that over 2 million Syrians had found refuge in neighboring countries.
- In **Sudan**, the lifting of food subsidies in September and below-average crop prospects could lead to increased food insecurity in 2013/2014.
- By January 2014 some 2.2 million people in **Zimbabwe** are forecast to face crisis (IPC phase 3) food insecurity conditions due to two consecutive years of poor production.
- In the **Central African Republic**, the population in Crisis (IPC phase 3) and Emergency (IPC phase 4) has increased to 1.3 million in July. The security situation has since continued to deteriorate.
- In northern **Mali**, a July food security and nutrition assessment indicates that half of households used emergency or crisis coping strategies (such as asset sales) during the lean season. In two of three districts, global acute malnutrition rates exceeded the 'serious' threshold.
- A dry spell in Karamoja, **Uganda**, has extended the lean season. Vulnerability levels are forecast to increase at the time of the February-August 2014 lean season.
- According to the **Madagascar** FAO/WFP Crop and Food Security Assessment Mission (CFSAM), some 3.9 million people will be food insecure until April 2014, following a reduced harvest.
- The Greater Horn of Africa Outlook Forum forecast suggests that below average rainfall is likely from October through December, which might affect crops and livestock in parts of **Somalia**, **Ethiopia** and **Kenya**.

Food insecurity hotspots

AUGUST – OCTOBER 2013



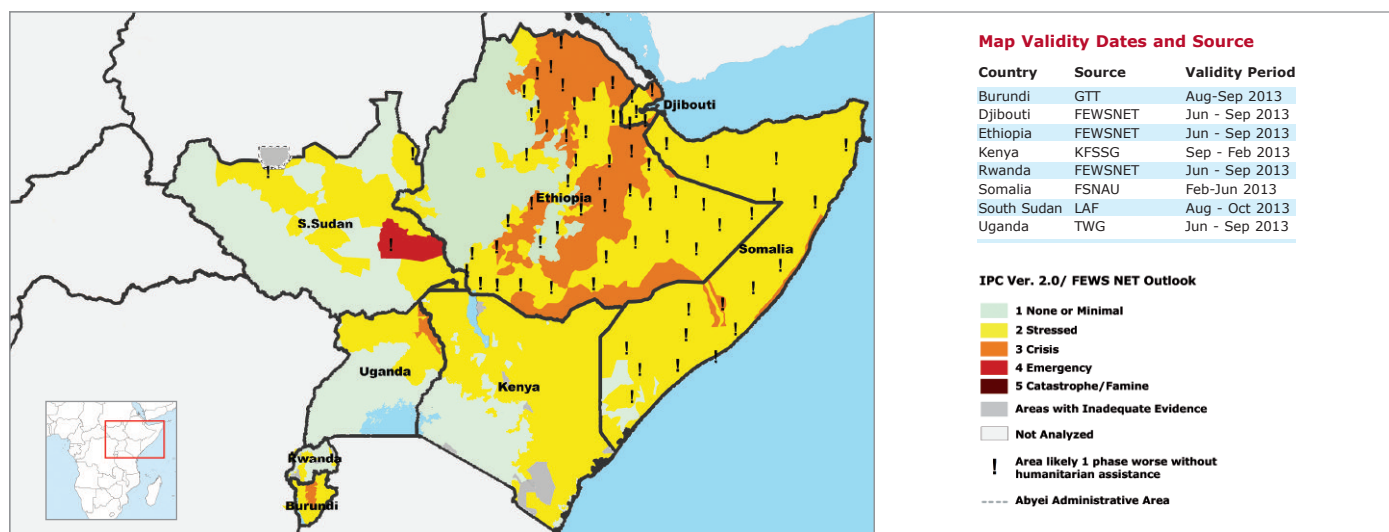
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Regional highlights

EAST AND CENTRAL AFRICA

- Food security has improved in many parts of East Africa as household food supplies increased following the end of the March to June agricultural season. Crisis (IPC phase 3) food insecurity remains in the south-eastern areas of South Sudan, central and eastern **Ethiopia** (mainly Oromia, Afar and parts of Amhara) and southern Somali region; northern **Djibouti**, and central **Burundi**; and some pocket areas of Karamoja in Uganda. Karamoja in **Uganda**.
- Following the main harvest, staple food prices in South Sudan and Somalia remained relatively stable. In Uganda, the national average maize price remained stable, however, maize prices are at alert and stress levels in a few markets, according to the WFP alert for price spikes (ALPS). Average maize prices in Kenya were also relatively stable. However, changes in policy, including the introduction of new taxes on imported foods in Burundi and Kenya, may lead to price increases for those commodities.
- According to the August 2013 IPC analysis in **Burundi**, **1.4 million** people are facing Crisis (IPC phase 3) and Emergency (IPC phase 4) food insecurity conditions. The July FAO/WFP CFSAM highlighted that the overall production of the *Saison B* (main) crop decreased by 7% compared to 2012.
- The food insecure population (IPC Phase 2 – Stress) in **Kenya** declined from about 1.1 million people in February 2013, to about **850,000** people in August, according to the Long Rains Assessment. Although production of sorghum, cowpeas and green grams (mung beans) has been above average in the southeastern and coastal lowlands, national maize output is expected to be 16% below the five year average.
- In **Ethiopia**, the September Humanitarian Requirement Document highlights that **2.7 million** people are in need of relief assistance during the second half of 2013 (+8% from January-June). The food security situation improved in most pastoralist and agro-pastoralist areas in the southern and south eastern parts of Ethiopia (notably Somali region) good *gu/ganna* rains. However, poor performance of the 2013 Belg (March-May) rains caused a deterioration of household food security in eastern Amhara and Southern Tigray regions as well as some parts of Oromia.
- The September *Post-Gu* assessment in **Somalia** states that **3.17 million** people are in Crisis (IPC phase 3) or Stressed (IPC phase 2) conditions. Compared to the previous *Deyr* 2012/13 season, the number of people in crisis decreased to 0.87 million from 1.05 million, under stress increased to 2.3 million from 1.8 million. Overall, the average to above average July-August Gu harvest resulted in a maize and sorghum production 24 % higher than the 2008-2012 average. However, maize production was very poor in Northwest Agropastoral livelihood zone and well below average Gu rainfall were registered in some areas of the central regions and the Shabelles.
- The July IPC analysis of **South Sudan** states that **1.2 million** people live under Crisis (phase 3) and Emergency (phase 4) conditions. As reported by FEWSNET and WFP, 100,000 people are affected by the hostilities in Pibor (Jonglei) and some 23,600 South Sudanese have fled to neighbouring countries as a result of the crisis.
- For **October to December**, the rainfall forecast, calls for normal to above normal precipitation for most of the western parts of the region. Below normal to normal rainfall is forecasted for for the cropping areas of northern highlands of Ethiopia and central Kenya, in addition to pastoral areas of Ethiopia, Somalia, Kenya and Djibouti.

Food Security Conditions (September 2013)



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

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- Preliminary crop estimates from CILSS indicate that the abundant and well-timed nature of rains in August and September have generally mitigated the effects of the late start of the season in most parts of the Sahel. In some areas, rains must continue until October in order to obtain satisfactory yields. Overall, an average level of grain production is expected in

the region. By contrast, the rainfall deficits observed since the start of the season have persisted along the **Gulf of Guinea**, from Ghana to Nigeria, which could have a negative impact on maize yields. Grazing conditions are assessed as average, with localized fodder deficits being observed in **Chad, Mauritania, Mali, Niger, and Senegal.**

IN FOCUS

Food crisis worsens in Central African Republic

- An IPC analysis carried out in the **Central African Republic** in July 2013 estimated that 40% of the rural population – some 1.3 million people – were in Crisis (IPC phase 3) or Emergency (IPC phase 4). This is nearly double the amount estimated in February 2013. In the most affected areas of the country (Ouham, Nana-Grebizi, Kemo, Ouham-Pende) more than 20% of the households were in Emergency (IPC phase 4). The consequences of armed conflict that started in December 2012 are the main drivers of high food insecurity. Farmers and pastoralists are the most affected livelihood groups.
- The IPC analysis carried out in CAR shows that the crisis has led to loss of household assets and the disruption of essential livelihood activities such as herding, hunting, fishing and farming. Armed groups have looted stocks, and household assets such as seeds and cattle. Insecurity has prevented farmers from sowing and working in their fields, while and blocking transportation routes. Mining and cash crop-dependent households have reduced market access.
- There are close to 400,000 IDPs in CAR, according to UNHCR, of which some 170,000 were displaced after renewed violence in Ouham province in September. According to UNHCR, more than 62,000 people have fled to neighboring countries since December 2012.
- Niger and Nigeria, and to a lesser extent **Benin, Burkina Faso, Gambia, Guinea, Mali, Mauritania** and **Senegal** have experienced flooding that has led to losses in food stocks, equipment, the destruction of housing and infrastructure and damage to crops.
- The start of the main harvest has improved food availability and has triggered seasonal drops in food prices. However in **Chad, Niger** and **Mali** the price of coarse grains remain above the five-year average. Insecurity in Northeastern Nigeria continues to have effects on food markets and trade.
- A July 2013 survey in **northern Mali** by the Government, FAO, WFP, and their partners show that most households' food security remained fragile, as insecurity delayed the distribution of food and non-food assistance. This situation led many households (approximately half of households in Kidal and Tombouctou regions) to resort to coping strategies that undermine livelihoods, such as the sale of productive assets, reliance on precarious income-earning activities, and the reduction of expenditure on education or health. According to the assessment, GAM rates stood at 7.4% in Mopti, 12% in Gao and 12.4% in Tombouctou. In the latter two regions these rates exceed the WHO 'crisis' threshold.

SOUTHERN AFRICA

- According to the SADC Regional Vulnerability Assessments, about 14 million people are food insecure in the 2013/2014 year, including 6.4 million in the Democratic Republic of Congo alone, an increase of about 23% from last year. Botswana, Madagascar and South Africa are not included in this figure.
- The results of the July 2013 IPC round in **Zimbabwe** indicated that Crisis (IPC phase 3) conditions prevailed in three provinces and a projected Crisis (IPC phase 3) situation in seven provinces out of the nine provinces in the country. In **Malawi** the August 2013 IPC round concluded that emergency (IPC phase 4) situation exists in four districts in the South while a crisis (IPC phase 3) exists in central and northern areas, due to food production declines. In **Namibia** revised estimates show that some 463,600 people are severely food insecure, up from 330,300 in May.
- Maize prices remain above usual levels in Malawi, Zambia and Zimbabwe. In Malawi, maize prices during the last quarter were on average significantly above the same quarter in 2012 (+34%). In Zambia, maize prices were almost 39% higher than in 2012. Meanwhile in Zimbabwe, most markets in the maize production area have reached alert levels during the quarter July-September according to the WFP ALPS. The most noticeable price increases as compared to the same quarter of last year are reported in Murombedzi (+50%), Murambinda (+42%), and Mount Darwin (+41%).
- Conflict in eastern DR Congo and Katanga continues to displace thousands of people. The June WFP assessment in conflict-affected North Kivu indicates that 61% of households were food insecure. In Katanga, the GAM rate is 13.8 % in Kabalo territory, according to the July MSF nutrition survey. Meanwhile, maize and cassava flour prices remained above the three year average in markets monitored by WFP and FAO.
- According to the July **Madagascar** FAO/WFP CFSAM, some 3.9 million people in rural areas are food insecure, mostly in the southern regions of Androy, Atsimo Atsinanana and Atsimo Andrefana. These households, and many others, are forecast to remain food insecure until the next main harvest in April 2014. The CFSAM estimated that the 2013 rice crop was 21% below 2012 levels, while 15% and 14% drops took place for maize and cassava respectively, as a result of erratic rains in the north, impacts of cyclone Haruna, and locust attacks. With low levels of stocks from own production, households are mostly relying on market purchases, at high prices. The most common coping strategies included buying cheaper food and reducing portion sizes.
- The recent regional climate outlook for the period **November 2013 to March 2014** indicates that (with few exceptions) the bulk of SADC region is likely to receive normal to above-normal rainfall, with likely impact on areas affected by risks of recurrent flood, and possible dry spells in low rainfall areas.

IN FOCUS

Food crisis forecast for much of rural Zimbabwe by January 2014

The 2012/13 rainy season was erratic in all provinces. The first effective rains were followed by a long dry spell which was coupled by very high temperatures in parts of Midlands, Masvingo and Matabeleland North and South provinces. This affected overall production of most crops planted in October and November 2012, resulting in very low cereal stocks from own production at the household level.

Acute Food Insecurity in July 2013

In July 2013, Matabeleland North and South and Masvingo were facing Crisis (IPC phase 3) levels of food insecurity, while the rest of the country was Stressed (IPC phase 2).

Most households in the affected areas rely on the market for their basic food needs. Although staple cereals are generally available throughout the country from both own production and the market, low incomes and high cereal prices are limiting household food access, particularly in the southern provinces. Almost 12 to 17% of the households that are without external support are finding it very difficult to access food on the market.

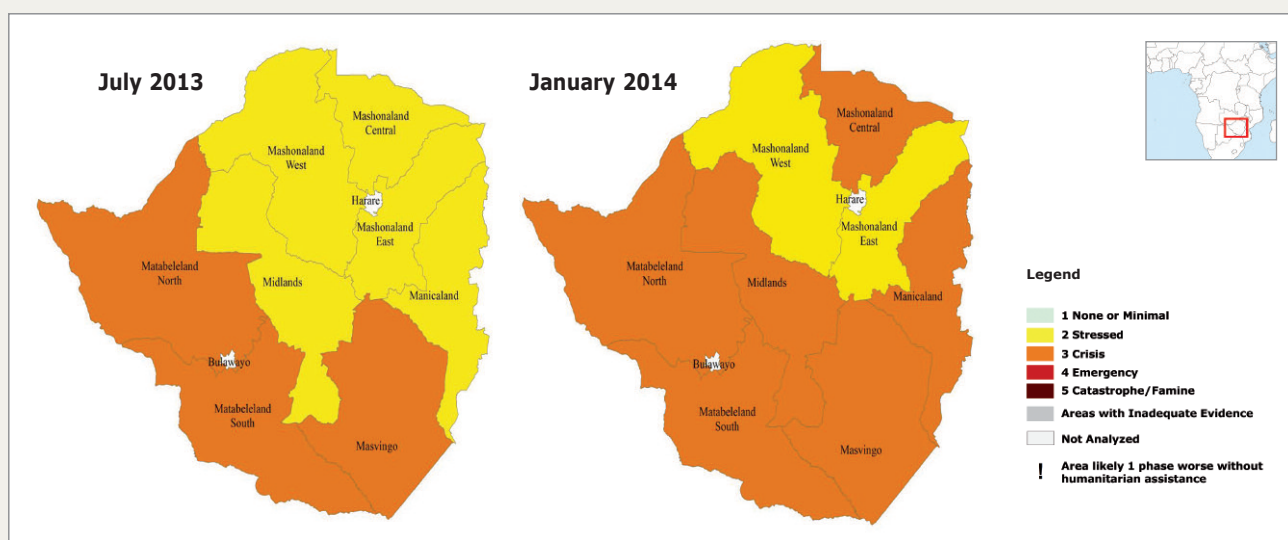
Many rural households' dietary diversity is low; 43% of households having poor to borderline consumption. In the worst affected areas, Matabeleland North and South and Masvingo, more than half (52-53%) of the households had poor to borderline food consumption.

Projected Acute Food Insecurity Situation in Zimbabwe

By January 2014, all provinces except for Mashonaland East and West are projected in Crisis (IPC phase 3). As most households in the affected areas will depend on the market for food, high staple food prices is expected to constrain food access. Almost 20-40% of these households will have no means to access food on the market. On farm casual labour opportunities are expected to be generally available.

The poor grazing and water condition in the affected areas experienced in the dry season is likely to improve following the first rains expected in December 2013/January 2014.

IPC acute food security in Zimbabwe: July 2013 and projection for January 2014



Source: IPC.

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MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

- In **Egypt**, during the second quarter of 2013, deprived households' vulnerability to food insecurity increased, compared to a year earlier, according to the quarterly Egyptian Food Observatory report. Meanwhile, WFP monitoring indicates that Syrian families living in Egypt are adopting negative coping strategies to sustain household food intake, including borrowing money or food, and purchasing cheaper

and less preferred foods. A slowdown in economic growth is expected for 2013/2014, while annual domestic inflation rates of food and non-food items are expected to rise in 2014. Should the Egyptian pound continue to depreciate in 2014, this would further deteriorate the purchasing power of vulnerable households.

IN FOCUS

Conflict increases vulnerability in Syria

The conflict in **Syria** intensified during the July – September quarter with a continued proliferation of various armed opposition groups leading to widespread insecurity. Fierce fighting has led to more population displacements in Homs, Idlib, Aleppo and the north eastern part of the country. Revised estimates indicate that the number of IDPs has risen to 6.5 million from 4.25 million in July. Vulnerability levels are expected to have significantly widened with reduced economic activity, a decline in food production and a much lower crop harvest than initially anticipated. According to UNDP, more than half of the population, 12.6 million persons, now live in poverty, of which an additional 6.7 million persons became poor during the period of the conflict, with some 3.6 million categorized as extremely poor. An estimated 2.3 million jobs have been lost since the start of the conflict, compromising the well-being of approximately 9.6 million people. The combined effects of high unemployment, reduced income generating opportunities, high inflation (estimated at 61.3% year-on-year in April), depreciation of the Syrian Pound and disruptions to the market and supply-chains have affected household capacities to access food and other basic needs.

WFP household monitoring found that almost half of all surveyed beneficiaries dedicate more than 75% of their available income to food, indicative of the extent of food needs. Some of the most common coping strategies observed include switching to cheaper foods, selling assets and taking children out of school. Increases in the price of vegetables and dairy products, 5 times higher for dairy products compared to pre-crisis levels, have forced a reduction in household dietary diversity, with the most vulnerable now consuming carbohydrates almost exclusively on a regular basis. Furthermore, the government repeal of fuel and electricity subsidies has meant that poor households can no longer meet their energy needs, which is critical in the lead up to the winter season.

Regional impact of the Syrian crisis

According to UNHCR over 2 million refugees had fled Syria, as of October 16 2013. Refugee numbers have grown to the extent that Syrian refugees account for roughly 10 and 20% of the population of **Jordan** and **Lebanon**, respectively. Since mid-August, there have been some 60,000 new arrivals in the Kurdistan Region of northern **Iraq**.

In **Jordan**, coping behaviour varies between camp and non-camp refugees. Those in host communities resort to more severe coping strategies, most likely because beneficiaries in Za'atri camp receive services free of charge. According to WFP monitoring, the most recurring consumption-based coping strategy is the reliance on less preferred and less expensive food. Many adults also restrict their own consumption in order to feed small children.

In **Iraq**, refugees are coping by limiting portion sizes, while adults restrict food consumption in order for small children to eat. These coping strategies were also cited, although to a smaller extent, in Domiz camp. In both locations, most heads of household have sought work outside of the camp.

In **Lebanon**, according to a World Bank assessment, the continuing refugee inflow will increase national vulnerability. Should refugee inflows continue, more than 170,000 additional Lebanese could fall into poverty by 2014, due to competition with refugees for unskilled labour. Currently, 1 million impoverished Lebanese have been pushed deeper into poverty as a result of the Syria crisis. The study estimates that the unemployment rate in Lebanon could double and exceed 20%. It is estimated that up to US\$1.6 billion will be needed to restore quality and access to health, education and social safety nets to pre-crisis levels. WFP, UNHCR and UNICEF conducted the Vulnerability Assessment for Syrian Refugees (VASyR) in May 2013, concluding that 70 % of Syrian refugee of households cannot meet their basic food and non-food needs.

- In the second semester, the food supply in Gaza, **Palestine** further deteriorated due to significant disruptions in tunnel trade with Egypt. Over the last few months, prices of goods have increased (+7% for oil, +33% for rice). Economic pressure on Gaza could impact the number of persons who are estimated to be in need to humanitarian assistance in 2014. The unemployment rate, which is normally around 30%, is expected to rise as construction and tunnel-trade employment stagnates. Prior to the tunnel closure attempts, the Socio-Economic and Food Security Survey revealed an increase in the food insecurity in Palestine, showing that 1.6 million people representing 34% of households in Palestine were food insecure, a rise from 27% the year before. The

deterioration was most pronounced in Gaza, where food insecurity levels surged from 44 to 57%.

- In September, **Sudan's** government lifted fuel subsidies, which might increase food prices in food deficit areas, due to higher transportation costs. An increase in the minimum wage was also announced to mitigate these effects. The depreciation of the Sudanese pound has already contributed to food inflation, assessed at 24% in July. Meanwhile, irregular rainfall in the surplus-producing East has raised the prospect of lower national food production. This will also likely contribute to heightened food prices in the country. FEWS NET estimates that the 2013 harvest in Sudan will likely be 15 to 20% below average.

ASIA

- In **Afghanistan**, poor weather has had a negative impact on the wheat harvest in central western areas, particularly Ghor province. A joint FAO, FEWS NET, WFP survey carried out in May concluded that that Crisis (IPC 3) conditions were expected from October in Ghor. Other factors are contributing to food insecurity, these include reduced remittance flows from neighboring Helmand province and reduced wage earning opportunities within Ghor. In the absence of additional assistance, these factors are likely to result in severe food gap and households depleting their assets. In this area, household food deficits are expected to peak during the winter (November-March), when physical access to Ghor becomes very limited. Nonetheless, at the national level, wheat flour prices are expected to remain stable thanks to an above average harvest at the national level and stable import prices.
- According to **Pakistan's** the National Disaster Management Authority, the two powerful earthquakes that struck in Balochistan in September have affected 185,000 people in the

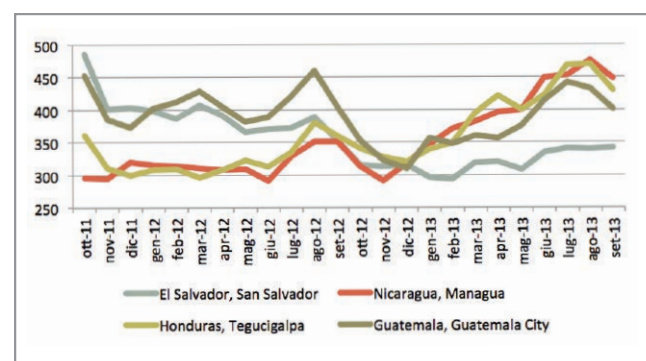
districts of Awaran and Kech (figures as of October 5). This remote and impoverished area had been classified as facing Crisis (IPC phase 3) food insecurity conditions. Floods in August affected some 1.5 million, living mostly in the provinces of Punjab, Sindh and Balochistan. In spite of a fairly good wheat harvest in April-May, the national average prices of wheat and wheat flour in September 2013 were 22% higher than a year before. Wage to wheat terms of trade in had deteriorated by 8% over the same period.

- According to WFP's August Rapid Food Security Assessment in **Sri Lanka**, out of a total population of 1.2 million in the north, nearly 44% are food insecure. The assessment indicated that the food security situation is fragile in poor areas due to a lack of livelihood and employment opportunities and consecutive natural disasters. People are using negative coping mechanisms to meet household food needs and considerable asset depletion has been reported over last year, as well as higher levels of indebtedness.

LATIN AMERICA AND CARIBBEAN

- The coffee rust fungus was detected on coffee plantations in the four **Central American** countries and in the **Dominican Republic** at the end of 2012. The Regional International Organization for Plant Protection and Health estimates that coffee rust fungus plague will destroy around 33-100% of harvests in 54% of land used to grow coffee in the region. The International Coffee Organization estimates that this could result in a loss of 441,000 jobs in coffee production in 2013. Forecasted losses for the 2014 harvest are even more alarming. Impacts of the coffee rust fungus will affect the food security of hundreds of thousands of vulnerable households who rely on small-scale coffee labor.
- In **Guatemala**, heavy rains caused localized flooding in Escuintla and other departments in September. In the eastern part of the dry corridor, an extended dry spell affected the growing season of the "primera" harvest. In **Nicaragua**, several municipalities in the Atlantic regions were affected by floods in July.
- FEWS NET reports that, local availability of maize is lower than normal in **Nicaragua** and **Honduras** due to lower or near to average production in 2012. In September 2013, wholesale white maize prices were 15% above the five year average in Managua and Tegucigalpa, while remaining below average in Guatemala City and San Salvador. Although they have begun to decline seasonally, maize prices are expected to remain above-average through the end of the year in Nicaragua and Honduras.
- A drought occurred in **Bolivia** during the first quarter of 2013, and the government declared a national emergency in June. Crop failure has been especially severe in the regions of the Chaco and the South

White maize meal wholesale prices, 2008-2013 in El Salvador, Tegucigalpa, Managua and Guatemala City. USD/mt.



Source: FAO GIEWS data.

Cone of Cochabamba. The most affected population is mainly indigenous subsistence farmers. Results of an August 2013 multi-sector assessment confirmed a deterioration of the food and nutrition security situation of the affected households. Many families have significantly reduced the frequency and quantity of food consumed. Many workers have migrated from their communities in search of casual labor. The affected households are not expected to recover until the next harvest in April/May 2014.

- In **Paraguay**, a lack of rainfall registered during the third quarter has caused a drought. The Government reported about 15,200 families have been affected in the departments of Presidente Hayes, Boquerón and Alto Paraguay.



Methodology

IPC standardized protocols respond to the need for a common approach for classifying various food insecurity situations, within and among countries, and across time.

Acute food insecurity is classified according to 5 phases:

Phase 1: None/Minimal

Phase 2: Stressed

Phase 3: Crisis

Phase 4: Emergency

Phase 5: Humanitarian Catastrophe/Famine

For more information on IPC please visit www.ipcinfo.org

Acronyms

ALPS	Alert for Price Spikes
CAR	Central African Republic
CFSAM	Crop and Food Security Assessment Mission
FAO	Food and Agriculture Organisation of the United Nations
FSNWG	Food Security and Nutrition Working Group
FEWSNET	Famine- Early Warning Systems Network
GAM	Global Acute Malnutrition
IDP	Internally displaced person
IPC	Integrated Food Security Phase Classification

UNCHR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNRWA	United Nations Relief and Works Agency for Palestine Refugees in the Near East
VAC	Vulnerability Assessment Committees
VAM	Vulnerability Analysis and Mapping
VASyR	Vulnerability Assessment for Syrian Refugees
WFP	World Food Programme
WHO	World Health Organisation

Information sources

CILSS: Comité Inter-Etats de Lutte Contre la Sécheresse au Sahel
FAO: www.fao.org
FEWS-NET: www.fews.net
FSNAU: www.fsnau.org
FSNWG: www.disasterriskreduction.net/fsnwg
ICO: www.ico.org
IPC: www.ipcinfo.org

MSF: Médecins Sans Frontières
OCHA: www.unocha.org
OIRSA: www.oirsa.org
SADC: Southern African Development Community
UNHCR: www.unhcr.org
UNICEF: www.unicef.org
UNRWA: www.unrwa.org
WFP: www.wfp.org/food-security
<http://foodprices.vam.wfp.org/ALPS-at-a-glance.aspx>

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Spain supports the preparation of the Global Update.



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