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Global Update
Food Security Monitoring

January - August 2011 • Issue no. 5

Highlights

- The impacts of the severe drought in the Horn of Africa continue to affect the lives and livelihoods of more than 13 million people. By September, six regions in **Somalia** were declared famine zones by the United Nations.
- In **Afghanistan**, poor rainfall has undermined production putting more than 7 million people at risk of food insecurity.
- Heavy flooding hampered agricultural production and trade flows in the **Democratic People's Republic of Korea** and more than 6 million people were estimated to be in need of international food assistance.
- Good harvests have improved food availability and access in **Cambodia, Indonesia, Bangladesh** and **Pakistan** with the exception of areas affected by flooding due to the seasonal monsoon. In addition, the Southern Africa region experienced above average production levels this year.
- Political and social upheavals keep on affecting the economic and humanitarian situation in the Middle East and North Africa. Tensions have escalated in **Libya, Syria** and **Yemen** and armed violence continue to cause loss of life, population displacement and rising food and fuel prices.

Fighting Hunger Worldwide

44 countries covered by the Global Update
Food Security Trends (January-August 2011)

Improving Stable Deteriorating

Food security trends in selected countries • January - August 2011

The table presents information on the countries where WFP participates in a Food Security Monitoring System • Based on reports dated January to August 2011

FOOD SECURITY TREND (JANUARY-AUGUST 2011) Improving / Stable / Deteriorating

FOOD SECURITY OUTLOOK (3 MONTHS) ↗ Improving / → Stable / ↘ Deteriorating

ALERT ⚠ Countries to be closely monitored

Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
Eastern Africa	BURUNDI	After 15 years of civil war, Burundi's political and security context has improved significantly. Even so, the country continues to face several challenges, including extreme poverty, climatic shocks and chronic vulnerability to food insecurity. Security problems persist and attacks by armed militias on police posts and villages intensified during July. Food security is still under threat because of rising food prices and a banana disease that has ravaged this staple food crop since November 2010.	The dry season began in the third dekad of June, but abundant rains fell in the Kirundo during the second dekad of June 2011. The rains have facilitated the late sowing of sweet potato, cassava and maize, and improved pasture conditions and banana production. However, the rains have also slowed down bean and sorghum harvesting. The July 2011 Crop and Food Security Assessment Mission (CFSAM) estimated that total food production for the 2011 B season (February – June, representing **50%** of national production) rose by **3%** compared with the same season last year. Cereal production increased by **6%**, pulses by **3%**, and tubers by **2%.**	Instead of decreasing as expected at harvest time, the prices of staple foods have been constantly increasing. The CFSAM reported the following price increases; beans **(37%)**, sweet potatoes **(17%)**, rice **(15%)**, bananas **(11%)** and cassava flour **(5%)** compared with the same period last year. Rising prices are linked to the increased cost of other basic items and services (e.g. fuel, transport and beer), as well as to increased food exports (rice and maize) to east African countries including Uganda, Rwanda and Tanzania. Despite lower fuel prices on the international market, the price of petrol remains high at US$1.63 per litre.The purchasing power of the vast majority of the population has been significantly lowered by rising food and fuel prices.	Based on the last food security monitoring and CFSAM surveys, consumption patterns across the country have improved and most households are able to meet their minimum dietary intake. Coping strategies adopted by households have shown a downward trend, implying better food security except for a few pockets in the western part of the country. Forthcoming lean season at the back of increasing prices and crop disease calls for close monitoring.	The last harvest has improved nutritional levels, and diets are of better quantity and quality. This positive nutritional trend should continue well into the next lean season, which started at the end of August.	Food prices, especially of beans and cassava, are expected to keep rising if the government does not intervene to increase imports or reduce the tax on food. A cumulative food deficit of 1,922 mt for all foods is predicted for May to October, equivalent to US$1.96 million.	↘
	ETHIOPIA	A severe drought in 2002/03 affected many sectors, including agricultural production. Since then, the economy has seen six fiscal years of broad-based and steady growth in real GDP. The la Niña phenomenon, which occurs every 2-5 years, has left parts of Ethiopia and the entire Horn of Africa drier than usual, sparking food security concerns in many areas. The worst affected regions are in the south (Oromia), southeast (Somali) and southwest (part of SNNPR) where the drought has caused substantial livestock mortality, failed crops and very high local cereal prices. In July, around 2,000 Somali refugees were entering the country every day in an effort to flee severe drought and violence. However, the influx has slowed in August with just over 250 refugees arriving daily. Food distributions are ongoing, but delivery in the Somali region is hampered by security issues.	The total failure of the Deyr rains (October to December) in 2010 and the poor Gu rains (April to June) in 2011 have caused the worst drought since 1950 in pastoral areas of Somali and Oromia. Due to the late start of the Belg rains (February-May) in Belg crop-producing areas, harvesting is expected to be delayed by one to two months, and the crop is expected to be poor because of low productivity and a smaller cultivated area. The June to September Kiremt rains started on time in Oromia; but were three weeks late and erratic until the first week of August in lowland Hawd pastoral. The Meher cropping activities in the Amhara region are progressing well since the rains improved at the end of July. The onset of the dry season in southern pastoral areas will exacerbate poor pasture conditions and water shortages, causing deterioration in body conditions and higher animal mortality in the drought-affected south and south-eastern regions. The situation is expected to worsen during the current dry season and will only improve with the start of the Deyr rains in October.	The price of maize rose by **42%** in the second quarter compared with the first, and is **191%** higher than the five-year average. Livestock prices began to decline in drought affected areas, especially in the south and south-eastern parts of the country, thereby worsening terms of trade for pastoralists. In addition, the recent unrest in the Middle East and North African countries has seen a drop in export demand for cattle, further lowering purchasing power for livestock owners	The situation of new arrivals in the Somali region is of grave concern with many arriving in already malnourished condition.	Recent rapid assessments indicate widespread increases in the prevalence of acute malnutrition. There has been a dramatic rise in the number of children admitted to outpatient therapeutic programmes. In the south-western region of Ethiopia, the admission rate increased by over **190%** between December 2010 and April 2011. The overall nutrition situation in the Dolo Ado camps is a major concern: one in three children under 5 arriving from Somalia is severely malnourished. In the recently established refugee camps of Kobe (June 2011) and Hilaweyn (August 2011), a measles outbreak is aggravating acute malnutrition and increasing mortality rates among children under 5.	4.5 million people require immediate humanitarian assistance from now until the end of 2011, following severe drought, crop failure and poor pasture conditions. This figure includes over 250,000 refugees from Somalia, mainly located in the Oromia and Somali regions. More than 450,000 mt of food is needed to cover the deficit of the affected households.	↘ ⚠

See page 26 for detailed information on the indicators

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Eastern Africa	KENYA	Kenya is a low-income food deficit country where **80%** of the land is arid and semiarid and agricultural potential is limited. The cumulative effects of two exceptionally poor rainy seasons has caused a rapid decline in household food security, particularly in the northern and north-eastern pastoral areas, the south-eastern areas and the coastal lowlands. Furthermore, localised price spikes in northern Kenya, and the increased occurrence of conflicts and livestock raiding, have continued to compromise food security. As a result of the crisis in Somalia, an estimated 1,200 Somali refugees were entering Kenya daily towards the end of the second quarter to escape the severe drought and violence. The refugee population has reached unprecedented levels, with over 75,000 arrivals in and around Dadaab and Kakuma camps.	The major crop-growing areas of the Rift valley, Western and Nyanza provinces were affected by the late onset of rains, but this was mitigated by good rainfall. Harvesting began this quarter with the bulk occurring in November. The 2011 maize harvest is expect to be about **15%** less than last year. In south-eastern marginal agricultural lowlands, a near-total crop failure has been confirmed. In a normal year, this harvest represents **30%** of the annual output. Conditions for local livestock are also deteriorating rapidly from their already poor levels because of an influx of livestock from neighbouring pastoral districts. During May and June, about **70%** of livestock migrated from the northern and north-eastern pastoral districts into the central, south-eastern marginal, coastal and eastern districts of the country. This was caused by the growing scarcity of water and pasture, and the increased risk of livestock mortality.	In the second quarter, prices of maize doubled compared with the first quarter of 2011.While prices are expected to decline in areas where the harvest is starting, they will remain between **70** and **100%** above the five-year average, particularly in drought-affected areas. Livestock prices are about **20%** below average while maize prices have more than doubled. This has greatly lowered the terms of trade for pastoralists. Parts of Turkana (northern Kenya) where barter trade is prevalent face particular problems.	Declining purchasing power is restricting agro-pastoralists' ability to access adequate food. Consequently, the majority of households are employing distress coping strategies such as selling young and reproductive livestock, or migrating to join agricultural or agro-pastoral groups. This is causing increased competition over limited water and pasture resources, often leading to serious conflict. Most new arrivals in Dadaab's three refugee camps (Ifo, Dagahaley, and Hagardhere) are emaciated. Furthermore, the size of the refugee population has far outstripped available facilities.	Recent nutrition assessments in the worst-affected areas of Kenya recorded GAM rates of between **22** and **37%**, while severe malnutrition was between **4** and **9.5%**. No recent figures are available for the situation inside the camps, but it is estimated that more than **30%** of newly arriving children are acutely malnourished. Many new arrivals have limited access to basic needs such as food, shelter, water and sanitation. Even inside the camps, the availability of sufficient drinking water could become a major challenge in the near future as ground water resources are limited. There is hence an increasing risk of the proliferation of disease.	A food security emergency is occurring in the northern and north-eastern pastoral areas of Kenya and in some parts of the south-eastern lowlands. The total food insecure population has risen to 3.7 million people because of the drought. Of this total, an estimated 1.2 million people are at emergency levels and are unable to meet their basic needs, another 2 million pastoralists and marginal agricultural farmers are in crisis, while 300,000 people are stressed according to the Integrated Food Security Phase Classification. Food security conditions are expected to deteriorate in pastoral areas and marginal cropping lowlands. The humanitarian situation will get worse unless significant humanitarian assistance is delivered soon. The crisis is expected to continue at least until the start of the short rains in October. In pastoralist areas, it could persist until February 2012, and in marginal agricultural areas, until the beginning of the next harvest.
Eastern Africa	SOMALIA	On 20 July 2011, the UN declared famine conditions in the regions of southern Bakool and Lower Shabelle in southern Somalia. A further declaration was made on 3 August announcing famine conditions in Afgoye Corridor IDP settlement, Balcad and Cadale districts in Middle Shabelle, and the Mogadishu IDP community. The crisis has b+C12een triggered by crop failure and record-level food prices, coupled with conflict, large-scale displacement and the persisting lack of humanitarian access. Tens of thousands of deaths have already occurred across southern regions of the country – the highest mortality rates are among children under 5 and pregnant and lactating women. Large-scale displacement and limited humanitarian access have exacerbated the situation. The total number of IDPs is estimated at 62,500, of which **82%** are displaced because of the drought. Displaced persons also continue to cross into neighbouring countries (Kenya and Ethiopia).	There was total failure of the 2010 October-December Deyr rains (secondary season) in the south, and the April-June Gu rains (primary season) performed badly. This led to poor germination or wilting during the first stage of crop development. In the same region, 2011 Gu cereal production is estimated at 37,600 mt, of which **62%** is maize, **36%** sorghum and **2%** rice. This is the lowest Gu cereal production in the last 17 years and it represents just **19%** of the 2010 Gu production and **32%** of the five-year average. The poor harvest will damage the livelihoods of millions of rural and urban households. Reports from north-western and north-eastern regions indicate that livestock body condition is average in all species except for sheep.	Prices of locally produced cereals have increased throughout the country compared with the same period last year (July 2010) with exception of the northwest, where prices have remained relatively stable. Staple cereal prices have risen dramatically in the following regions: Shebelle (maize **+135%**), Juba (maize **+93%**), Central (sorghum **+77%**), Northeast (sorghum **+61%**), Sorghum Belt (sorghum **+129%**), and Benadir (maize **+107%**). Absolute food prices and the size of food price increases continue to be highest for local cereals in Bay, Middle Juba, and Lower Shabelle Region. The highest observed annual price rise is in Jilib, Middle Juba, where white maize in July was **325%** above June 2010 levels.	According to the Food Security and Nutrition Analysis Unit (FSNAU), across all livelihoods in southern Somalia, over **30%** of the population cannot meet basic food needs and have almost no ability to cope with these food deficits. Access to food and income is drastically reduced because of poor crop and livestock production, limited income options (wage labour and sale of own produce), asset losses (cereal and livestock), and weakened purchasing power following rising cereal prices and falling livestock prices. With rising staple food prices and continued insecurity, the flow of food is limited and the poor rural, urban and IDP market-dependent households will find it increasingly difficult to access food.	According to FSNAU's recently conducted surveys, **38.3%** of children are acutely malnourished (levels above **15%** indicate an emergency level) and severe acute malnutrition is at **16.9%** in southern Somalia. The highest recorded levels of acute malnutrition are in Bay and Gedo (agro-pastoral) where GAM rates exceed **50%**. Population-wide death rates are above the alert level (1/10,000/day) across all areas of the south. They are above the famine threshold (2/10,000/day) in the Bakool and Middle Shabelle (Balcad and Cadale) agro-pastoral livelihood zones, and more than double the famine threshold in Lower Shabelle and among IDPs in the Afgoye Corridor and in Mogadishu. Alarming rates of confirmed cholera cases among IDPs have been reported in Mogadishu, and there are confirmed outbreaks in the Afgoye Corridor, Baidoa, and in Lower Shabelle and Mudug districts.	The UN has declared famine in five areas in southern parts of Somalia. 3.7 million people are in direct need of humanitarian assistance and are at risk of starvation. Despite increased attention in recent weeks, the current humanitarian response remains inadequate because of ongoing access restrictions and difficulties in scaling up emergency assistance, as well as funding gaps. As a result, famine is expected to spread across all regions of the south in the coming weeks and it is likely to persist at least until December 2011. A massive multi-sectoral response is critical to prevent additional deaths and the total collapse of livelihoods

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Eastern Africa	SOUTH SUDAN	On 9 July 2011, the Republic of South Sudan became an independent state. Despite significant improvements since the Comprehensive Peace Agreement in 2005, the country still has high poverty rates **(51%),** insufficient infrastructure and poor economic diversification. South Sudanese started returning from the North in large numbers in late 2010, adding on the burden on already fragile communities. The national economy depends heavily on oil, accounting for **98%** of the government budget. Revenues are limited as the main pipelines and processing plants are located in the Sudan, even though **85%** of oil production is in South Sudan. The security situation is still fragile in the Transitional Areas. In May 2011, the takeover of the disputed territory of Abyei by northern forces displaced 110,000 people into the south, while the bombing of a disputed area on the South Kordofan border with Unity State displaced 7,000 people. Since the start of the year, recurrent inter-communal conflicts across South Sudan have led to the displacement of 74,000 people and the death of 2,500 people. Commodity flows from north to south have been hindered by insecurity, and the flow of food and non-food supplies has dropped by **40%**, resulting in shortages and food and non-food price rises, particularly in the northern states.	A prolonged dry spell in April was interrupted by abundant rainfall at the beginning of May in Western and Eastern Equatoria States. However, soil moisture deficits persist in several areas of the country, which are likely to reduce crop establishment and pasture availability. Rainfall resumed from the last week of July, but the effect of the moisture deficits on crop performance is still being assessed. In June 2011, **90%** of monitored households were cultivating crops in the ongoing agricultural season. Sorghum was being cultivated by **71%** of households, maize by **61%** and groundnuts by **49%**.	Food prices continue to rise following disrupted trade and increased demand by returnees. In Upper Nile, prices for white sorghum fell slightly compared with the previous quarter but they are **376%** higher than the five-year average and **131%** higher than last year. Across the country, purchasing power has deteriorated because of rising food prices, although the southern states are less impacted as they depend more on imports from Uganda and Kenya.	The June 2011 Food Security Monitoring found that **12%** of households had poor consumption and **29%** had borderline consumption. This is a slight improvement from February 2011 when **15%** had poor consumption and **27%** borderline consumption. Returnee households had poorer food consumption **(14%)** than residents **(12%)** and IDPs **(11%)**. **66%** of households were forced to use adverse coping strategies in June 2011, compared with **60%** in February. The most common strategies were eating less preferred, cheaper food **(55%)**, limiting meal portions **(46%)** and reducing the number of meals per day **(46%)**. Similar adverse coping strategies were being adopted by **67%** of returnees, **66%** of residents and **70%** of IDPs.	Pre-harvest county-level surveys in March and April 2011 by Nutrition Cluster partners revealed serious levels of GAM and SAM above emergency thresholds in 13 of the 20 surveys, with an additional 5 counties falling within the acute range. The June Food Security Monitoring surveyed 2,428 children under 5 and found that **12.6%** were acutely malnourished based on MUAC. This is higher than in February 2011 when GAM was **9.1%**. In June, **27%** of children under 2 had adequate dietary diversity (consuming food from 4 or more food groups), which was an improvement on **21%** in February. The monitoring also showed that **65%** of children under 2 were ill: **27%** had diarrhoea, **24%** had fever and **13%** had ARI.	The food security and nutrition situation has deteriorated as a result of recurrent conflicts, low food stocks caused by trade blockades, high food prices, and large numbers of returnees from Sudan. If these conditions persist, food insecurity could reach emergency levels even higher than current lean-season levels when 1.3 million people are already in need of food assistance. The situation could be made worse if rising regional food prices (driven by famine) in the Great Horn of Africa persist.	↘
	UGANDA	Uganda is endowed with a diverse natural resources base, that includes fertile soils, regular rainfall, small deposits of copper, gold, and other minerals, and recently discovered oil. It is sometimes referred to as the bread basket of the region, largely because of its surplus production of maize, which is mainly exported to South Sudan. The country has made remarkable progress in poverty reduction. The proportion of the population living below the absolute poverty line fell from **56%** two decades ago to **23.3%** in 2009/10. The 2009 global economic downturn hit Uganda's exports; however, GDP growth is still relatively strong (**5.1%** in 2010). Nonetheless, the ongoing food security crisis in the Horn of Africa and high global maize prices are pushing food prices up.	Following the late onset of the rainy season, the harvesting of the 2011 "long rains" crops in bimodal areas has been slightly delayed, but overall cereal production is tentatively forecast to be above average. In the unimodal agricultural and agro-pastoral areas of Karamoja region, prospects for the September harvest are uncertain. A positive start to the rainy season in March was followed by erratic and below average rains, which is likely to lead to below average output. Pasture conditions improved following adequate rainfall, thus improving animal body conditions and milk production. However, since February, foot and mouth disease has spread to several areas of the "cattle corridor", causing the temporary closure of some livestock markets. The quarantine imposed in these areas was only lifted in June.	In the second quarter of 2011, the price of maize flour rose by **25%** compared with the first quarter. Maize flour prices are **14%** higher compared with last year, and **120%** higher than the five-year average. Households depending on livestock sales in the "cattle corridor" have lost some of their purchasing power because of foot and mouth disease. Meanwhile, both maize crop producers and coffee producers are benefiting from higher prices for their goods.	Information on Food Consumption & Coping Strategies was not available for this reporting period.	Information on nutrition was not available for this reporting period. In the 80s and 90s, Uganda had one of the highest HIV infection rates in the world. A government campaign has succeeded in reducing this rate, which now stands at around **6.5%**. Despite improvements, Uganda still hosts 1.2 million orphans.	Overall, the food security situation in the country is stable following the good 2010 aggregate cereal production, which improved household food stocks, market supplies and income. However, pockets of chronic food insecurity exist, particularly in Karamoja and other parts of northern Uganda. Furthermore, following the 2011 first season harvests, prices started to drop, especially for maize and beans. However, because of high fuel prices, general inflation and sustained regional demand, continued monitoring of prices is essential particularly for maize and beans.	→

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Southern Africa	LESOTHO	Lesotho is a small, land-locked country characterized by chronic poverty and malnutrition. In late 2010/early 2011, the country was hit by heavy rainfall which negatively affected production and on-farm employment opportunities. The country has also one of the highest levels of HIV infection prevalence in the world.	The Leribe and Maseru districts, which produce one third of the total national maize output, experienced an intense period of heavy rains towards the end of the planting period, hence stunting crops. Subsequent low yields resulted in a **60%** drop in maize production compared with last year's harvest, about one third lower than the five-year average. Aggregate national cereal production for the 2011/12 marketing year is estimated to meet only one quarter of the country's cereal requirements. The rains also damaged agriculture infrastructure and the livestock sector; an estimated 44,000 livestock (around **2%** of the total national population) died . In addition, higher than normal incidences of vector-borne diseases were reported.	Food prices remained stable during the first semester of 2011. Compared with May 2010, the food consumer price index rose by **5.6%**. Lesotho has also been affected by rising fuel prices. The purchasing power of farming households and livestock sellers will severely deteriorate in the coming months because of the damage to the livestock and agricultural sectors. **25%** of the national population derive their income from agriculture.	The poor cereal harvest has reduced household food supplies, which may lead to poorer food consumption and a probable increase in the use of adverse coping strategies.	Information on nutrition was not available for this reporting period. The country has one of the highest prevalences of HIV infection in the world **(23.6%)**, which has created 130,000 orphans. The heavy rainfall in early 2011 damaged water infrastructure in some areas, contaminating drinking water.	The reduced cereal harvest is expected to have a significant impact on food security conditions; household food supplies will diminish and income will fall as seasonal farm employment opportunities become scarce. The impact on the livestock sector will also affect dairy production and income from livestock sales. Results from the 2011 Lesotho Vulnerability Assessment Committee (LVAC) indicate that 514,000 people will require food assistance during the 2011/12 marketing year, with the majority located in the southern lowlands. With income limited, any increase in food prices may worsen the food insecurity of vulnerable households.	↘
Southern Africa	MADAGASCAR	Madagascar is a low-income food deficit nation characterized by high poverty and chronic malnutrition. Its poorly developed transport infrastructure greatly restricts economic growth, impedes poverty reduction and reduces food security. Madagascar has one of the highest chronic malnutrition rates in the world as confirmed by the Demographic and Health Survey (DHS) of 2009: every second child is stunted and anaemic. The country is also highly prone to natural disasters, including drought and cyclones. In February 2011, Cyclone Bingiza caused flooding in the north-eastern and south-eastern districts.	Rainfall was generally favourable in the central and southern regions throughout the agricultural season, facilitating crop development. However, a **30%** fall in rice production in the major granary, Alaotra Mangoro, was declared by the regional directorate of rural development and confirmed by local farmers. Many rice fields were not exploited because of late rains. The highlands also expected a decrease in rice production this year following a hailstorm that destroyed part of the mature crops. In the district of Faratsiho, between 60 to **70%** of rice production was destroyed. Cyclone Bingiza damaged 26,000 hectares of paddy crop in the northern districts, primarily affecting the Analanjirofo region in the north-east, while about 40,000 hectares were damaged in south-eastern areas.	The second quarter of the 2011 harvest season saw the price of local rice fall by **18%** compared with the first quarter. Prices were **10%** lower than the same period last year, but 1**3%** higher than the five-year average.	Localized shocks and reduced household stocks have prolonged this year's lean season in many areas. Cyclone Bingiza affected food access by reducing the food consumption of the majority of households in the south-eastern coast between May 2010 and March 2011. In particular, half of households in the district of Farafangana had poor food consumption in March 2011 (**29%** higher compared with last year). In the district of Vohipeno, the number of households with borderline consumption increased by **25%** during the same period.	A survey undertaken on 443 students of six schools in Tsihombe district (in the South) in late February 2011, revealed a prevalence of acute malnutrition of **6.1%** among 6-14 year children with a severe case **(0.2%).** Furthermore **44.0%** were stunted (**17.8%** of severe) and **42.5%** underweighted (**8.4%** of severe).	The food security situation has deteriorated in many parts of the country because of delayed rains and effects of Cyclone Bingiza. Food security conditions are expected to stabilize in the coming months as the continuing harvest increases food availability at market levels and subsequent access at household level.	→

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Southern Africa	MALAWI	Over the past few years, Malawi has had a food surplus largely attributed to an agricultural scheme that has been described as an "unique green revolution". Despite this achievement, a large proportion of the population remains below the poverty line. Poverty continues to hamper development and foster discontent with the current government. In July, the country saw protests and civil unrest in the major cities including Lilongwe. This was sparked by fears that the democratic state was sliding back into one-party state rule.	In early 2011, heavy rains and flooding in the northern district of Karaonga affected over 5,600 households and caused localized crop damage, particularly to cassava. In February, some southern districts saw a dry spell, which particularly affected the late planted crops in areas along the Shire River between Mangochi and Nsanje. These areas also experienced production shortfalls during the last agricultural season. In April, maize harvesting commenced. National crop production was favourable, with estimates pointing towards a record maize harvest, **13%** higher than the previous season. Production gains were supported by favourable rainfall over most of the country and a subsidy programme for an estimated 1.6 million smallholder maize farmers. The country is expected to retain a significant surplus in the current marketing year (2011/12).	During the second quarter of 2011, the price of maize fell by **13%** compared with first quarter because of the harvest season and remaining stocks from the previous year's good harvest. Compared to last year, prices are down by **18%**, but they are **74%** higher than the five-year average. Input support through the government's Farm Input Subsidy Programme (FISP) benefited 1.6 million smallholder maize farmers by increasing their yields and purchasing power. However, recent policy measures including tax increases and the severe reduction in foreign reserves may cause food inflation and reduce purchasing power, particularly in urban areas.	Information on Food Consumption & Coping Strategies was not available for this reporting period.	Information on nutrition was not available for this reporting period. As per the 2010 Malawi DHS, the prevalence of acute malnutrition is low, with wasting at **4%** and stunting at **47%** of children under 5. The country has a HIV infection prevalence of **11%**; HIV and AIDS have resulted in 650,000 orphans.	Except for small areas affected by floods or drought, overall food availability continues to improve in Malawi mainly due to this year's bumper maize harvest. However, the political situation has to be monitored over the next six months as public discontent is building over high poverty rates and limited political participation.	↗
	MOZAMBIQUE	Mozambique, a low-income food deficit country, is prone to natural disasters that regularly cause serious damage and set back economic growth. The devastating floods in 2000 and 2001 and the drought of 2002/03 are two cases in point. HIV and AIDS have also impacted lives and livelihoods, further undermining development gains. In response to global high food prices crisis in 2008, and leading up to the 2009 elections, the government introduced food subsidies. This system is to be replaced by a more cost-effective approach targeting the urban poor. This change was planned for mid 2011 but has not yet taken place. Previous government attempts to remove the subsidies led to rioting throughout the country.	Overall national crop production is expected to be average, especially as the productive northern areas forecast good harvests of maize and other crops. This is in spite of the floods and extended dry spells that have affected the arid and semi-arid areas in the south and central parts of the country. Cereal production estimates for the 2010/11 season remain satisfactory, with maize production set to be slightly above last year's output. Local food reserves should last until July for cereals, and until October for cassava in central and southern Mozambique. In the north, food reserves are expected to last until December or February of next year, depending on the outcome of the second harvest.	In the second quarter of 2011, maize prices fell by **16%**, reflecting the good harvest. Prices remained stable compared with one year ago, but they are **97%** higher than the five-year average. Imported rice prices rose by **6%** compared with the first quarter.	An Urban Vulnerability Analysis for Food Security and Nutrition (Urban VA) conducted in December 2010 and January 2011, indicated difficulties in accessing food. Rising food prices and declining incomes is indeed leading to reduced food consumption and use of distress coping strategies. Note that increasingly more households were reportedly having poor food consumption and exhausting savings and selling assets.	Health & Nutrition information was not available for this reporting period.	Overall the food security situation remains stable, a result of good crop production. Nonetheless, pockets of food insecurity remain. Production losses caused by climatic shocks in central and southern provinces could limit household food stocks.	→

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Southern Africa	NAMIBIA	Mining is the backbone of the economy, contributing **60%** of total export earnings. However, social inequalities are highly skewed: Namibia has the highest Gini Coefficient in the world (74.3). The economy is closely linked to South Africa's, with the Namibian dollar pegged to the South African rand on a one-to-one basis. Like its neighbours, Namibia faces a serious HIV/AIDS challenge. Namibia is an arid country with an annual average rainfall of 100 millimetres that includes the Kalahari and Namib deserts. The northern central regions are characterized by extensive plains or oshanas, which often suffer severe flooding as water overflows from the Kunene River. After the drought of 2007, the country saw three years of successive flooding which displaced many families, caused serious agricultural and livestock production losses, and damaged infrastructure.	Northern parts of Namibia received excessive rains during the first quarter of 2011. Estimates indicate that 56,000 ha of farmland were damaged by the flooding in the millet-producing regions of Oshana, Omusati and Kavango. As a result, cereal production will be lower than originally forecast. However, even in a good production year, Namibia is highly dependent on food imports.	The annual inflation rate rose from **3.8%** in March to **4.3%** in April; the annual food inflation rate went up from **2.6** to **4.3%** during the same period. These increases are seasonal, but have been exacerbated by floods and higher transportation costs caused by damaged roads and increased fuel prices. Rising maize prices in South Africa, caused by continued high demand on the world market, may make this situation worse.	There is now better physical access to previously cut-off areas and the short-term needs of severely affected households are being assessed to determine the level of extended emergency response. It is estimated that 260,000 people were affected by the floods in Oshana, Omusati, Ohangwena and Oshikoto. The coping capacity of households has been severely diminished by several consecutive natural disasters, including a drought in 2007 and recurring floods.	There is a high risk of communicable disease outbreaks in flooded areas because of stagnant water, poor sanitation and inadequate access to drinking water. Almost 18,000 diarrhoea cases were reported in these areas between January and April 2011. It is estimated that **13%** of adults in Namibia are infected with HIV.	The food security situation in the flood-affected areas has worsened over the past six months due to the third consecutive year of flooding. It is not yet clear how long it will take households to recover, as the effects of the flooding are still being assessed. However, the most vulnerable households are likely to remain dependent on assistance over the 2011/12 consumption period.	→
	SWAZILAND	Swaziland is a landlocked country bordered to the north, south and west by South Africa. The HIV infection rate in the country is the highest in the world with **26%** of adults affected. The global economic downturn in 2009 has reduced remittances from South Africa and hampered food security for households highly dependent on them. The country is frequently affected by drought and water resources are mainly allocated to the production of sugarcane, the main export. The country is currently facing serious financial challenges which have been exacerbated by reduced financial receipts from the Southern African Custom Union. Swaziland is now implementing social and economic reforms monitored by the IMF.	There has been an increase of **20%** of the area planted, but this has only generated a **12%** rise in production. The reduced yields were caused by irregular rains during the October to April growing season. During the first two months of this marketing year, the rate of maize imports from South Africa are set to be below the levels recorded the same time last year. This is a result of the larger maize harvest in 2011. Approximately 4,300 mt of maize were imported in May and June, compared with 10,000 mt during the same months in 2010. This makes Swaziland slightly less dependent on food imports from South Africa.	Despite increased production, maize meal prices rose by **18%** compared with the first quarter of 2011. They are **21%** higher than the same season last year, which can be partly explained by the ever-increasing prices in South Africa. Transport costs have risen by **14%**, reflecting higher fuel prices. The overall purchasing power of migrant households is expected to stabilize or improve as the South African economy in terms of GDP growth slowly recovered from **-1.7%** in 2009 to **2.8%** in 2010.	Information on Food Consumption & Coping Strategies was not available for this reporting period.	Due to the effects of AIDS, Swaziland has seen a dramatic rise in morbidity and mortality. The infant mortality rate is 85 deaths per 1,000 live births and the under-5 mortality rate is 120 deaths per 1,000 live births.	The food security situation has generally improved: while **15%** of the population relied on food assistance last year, only **7%** are dependent this year. Despite improving trends, the Swaziland Vulnerability Assessment Committee (VAC) estimates that 88,500 people will not be able to meet their basic food requirements and will therefore require assistance during 2011/12. Most food-insecure households are located in the eastern Lubombo region.	↗

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Southern Africa	ZAMBIA	Zambia has for many years been characterized by an undiversified economy and a very high dependency on the export of copper, making it highly vulnerable to external shocks. During the 2009 global financial crisis, it suffered a reduction in financial flows, trade, remittances, and official development assistance. Since then, the economy has recovered, driven largely by the mining and agricultural sectors.	Rainfall patterns were generally favourable from October to April across the country. However, there were periods of heavy rains in January and deficits during February predominantly in areas along the Zambezi basin. This affected **25%** of staple crops, causing water logging in the worst-hit districts. The dry spell, which damaged staple crops in south-eastern areas of the sub-region, caused wilting in the Mambwe Kaoma, Sesheke and Senanga districts. The country recorded another bumper harvest during the 2010/11 season, with a surplus of over 1 million mt, **8%** higher than the previous season's output. This increase has been largely attributed to favourable rain conditions and the continued assistance through the Farmer Input Support Programme (FSIP), which has an estimated 900,000 beneficiaries.	Maize prices remain low and stable, a reflection of the abundant national supplies and favourable crop prospects. In the second quarter of 2011, prices fell by **7%** compared with the first quarter and by **8%** compared with one year ago. Even so, prices remain **59%** higher than the five-year average.	Food consumption is likely to have increased because of the bumper harvest and better household incomes. Households are also able to access a variety of seasonal foods, thereby possibly increasing dietary diversity.	Information on nutrition was not available for this reporting period. The last DHS was in 2007. The country has an HIV infection prevalence of **13.5%** and hosts 690,000 HIV/AIDS orphans.	Overall, national food security conditions remain favourable in most areas because of good production and comparatively low and stable maize prices. However, areas affected by floods and dry weather (Western, Southern and Lusaka provinces), may suffer localized production shortfalls in both food and cash crops.	↗
	ZIMBABWE	After a period of unprecedented hyperinflation and severe economic decline, the adoption of a multi-currency regime in February 2009, as well as economic liberalization of certain sectors has contributed to an improved performance of the economy. Even so, the country is still operating on a large current account deficit. The deficit is expected to continue at significant levels, given that the industrial sector remains highly dependent on imports. The economy also continues to suffer from a variety of shortages, especially of fuel and electricity.	Rainfall patterns in 2010 and early 2011 were generally favourable, supporting crop development, but they were disrupted by a period of heavy rains affecting low-lying parts of Midlands, Mashonaland Central, and north and south Matabeleland provinces. In February a dry spell followed that mostly hit low-producing southern areas. During March/April, rains improved in northern regions, but water deficits continued in some southern and central areas, impacting maize production in Matabeleland South and parts of Midlands. The 2010/11 maize production is **9%** higher than last year, mostly because more land was cultivated and yields increased in high production areas. By contrast, sorghum, millet and cotton are set to remain below last year's average as fields have been substituted with maize or tobacco.	In the second quarter of 2011, maize prices fell by **2%** compared with the first quarter, but was **680%** above the five-year average, though only **28%** above last year's prices. The purchasing power of livestock sellers has increased over the past six months, though conditions for grazing have deteriorated in areas hit by the prolonged dry spell. The terms of trade for livestock sellers may decrease as the dry season progresses.	According to the April 2011 Community and Household Surveillance (CHS) carried out in WFP-supported regions, **27%** of households had poor or borderline food consumption; in March 2010, the proportion was **42%**. Food consumption has therefore improved this year. This positive trend was also reflected in a slightly reduced coping strategy index, showing a decline in use of adverse coping strategies.	No new nutrition data has been collected since the National Nutrition Survey conducted in January 2010. Since the beginning of this year, 10 of the country's 62 districts have reported cholera cases. By mid-June, 1,134 cholera cases and 45 deaths had been reported, giving a crude case fatality rate of **4%**. This is close to the **4.3%** recorded at the peak of Zimbabwe's worst cholera outbreak in 2008/9, which caused 100,000 cases and 4,000 deaths.	The overall food security situation remains stable, a situation attributed to good availability of maize and a bumper harvest in neighbouring Zambia. However, in some areas where households have limited income sources and low food stocks, food access may deteriorate. Furthermore, the dry spell that reduced production in southern areas will make it difficult for households to replenish their food stocks.	↗

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West Africa	BURKINA FASO	After suppressing a serious military mutiny in early June 2011, the Government of Burkina Faso has been seeking to calm the socio-political situation and is working on a reform agenda. Demonstrations and strikes continue, but on a much reduced scale. Official efforts to lower the price of key consumer food items – as agreed at the end of April – have so far only had limited success. The producer price for cotton has gone up by **16%** for the 2011/2012 season. However, cotton farmers consider the new price to be too low and are demanding that the government double it. Strikes have disrupted production at four of the country's six industrial gold mines.	The start of the rainy season was delayed in several localities, leading to re-sowing in some areas. Rains resumed in July, and the season has normalized. Crop production estimates for the 2011 harvest are due in September/October. The 2010 harvest produced over 4.5 million mt of cereal, generating an estimated surplus of 757,000 mt. The harvest was **26%** higher than the previous year and **27%** more than the five-year average.	Large carry-over food stocks from the bumper harvest of 2010 have helped to offset 2011's increased global food prices. Nonetheless, high prices have been exerting strong upward pressure on import prices (which are up **28%** from last year for rice and cooking oil). In turn, domestic food inflation and transport costs have escalated, the latter caused by high global fuel prices. Despite government measures to bring down the price of key consumer goods, the retail market prices of most of the goods, including rice, have hardly changed except in a few shops in Ouagadougou. This forced wholesalers to sell their existing rice stocks close to, or below, the old price, in anticipation of government subsidies. Importers and other merchants have urged the authorities to take action on other fronts, such as reducing customs duties and increasing fuel subsidies.	Typical coping mechanisms for households include diversification of livelihood activities, including vegetable gardening, animal breeding, gold washing, and manual labour. Other distress related coping strategies commonly adopted are reducing the number of meals consumed daily. This is particularly risky, for children.	Health & Nutrition information was not available for this reporting period.	The food security situation has improved due to stable cereal prices and good food availability from an above average cereal production. As a result, food security is expected to remain unchanged for most households. Nevertheless, the most vulnerable households will continue to struggle to access food during the lean season and will depend more than ever on their already weakened coping mechanisms.	↗
West Africa	CHAD	Chad is surrounded by politically unstable countries (Libya, Sudan, South Sudan, and Central African Republic - CAR). The eastern and southern parts of the country have been hosting thousands of refugees from Darfur and CAR for over a decade. The Sahel zone is exposed to climatic shocks and suffers from drought and cereal deficits. The country is therefore heavily dependent on external food aid.	Due to the abundant rainfall during the 2010/2011 agricultural season, cereal production reached record levels. Statistics released by the Ministry of Agriculture and Irrigation show an increase in cereal production of **116%** compared with 2009/2010, and **85%** increase on the five-year average. However, the 2011/12 agricultural season was not successful throughout the country because of delayed and sporadic rainfall. This then delayed land preparation, sowing/planting, the reconstitution of pasture and the movement of livestock to the north.	Since February 2011, prices of basic cereals have continued to rise throughout the country. There was an unusual early increase in cereal prices in February and March. Prices subsequently stabilized in April and May and went up again from June to July in line with the lean season price highs. In the south, current prices are already above the five-year average, and they are above levels recorded in June 2010. By contrast, in the Sahelian belt prices are much higher than the five-year average but they remain below June 2010 levels: 2010 was a particularly difficult year for the area.	A recent WFP assessment (EFSA, April 2011) reports that in the Sahelian belt, **29.5%** of households are severely food insecure, and **21.7%** are moderately insecure. The zones most affected are the Kanem, Bahr-el-Ghazal, Guera, Batha, Lac, Hadjer Lamis, Wadi Fira, Ouaddai and Sila. Furthermore, most households consume two meals a day, while low-income households have deployed coping strategies such as reducing the frequency and quantity of meals consumed, consuming less preferred foods, taking on casual work, and borrowing money.	A survey conducted by the various agencies; government/UNICEF/WFP in April 2011 shows very high GAM rates (about **15%**) in the Sahelian belt. Rates of chronic malnutrition as high as **50%** have been recorded in Hadjer-Lamis, Ouaddai, Kanem and Salamat, similar to 2010 levels. Cholera epidemics, polio, measles and meningitis have also been reported.	Although the 2010/11 grain production is **85%** above the five-year average, the poor households of the Sahel remain vulnerable to shocks. The main constraints currently affecting food security in Chad are the poor start to the 2011/2012 agricultural season and high food prices. The potential impact of the ongoing conflict in Libya needs to be monitored closely.	↘

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West Africa	CÔTE D'IVOIRE	The post-election crisis, which began after the second round of presidential elections, resulted in gross violations of human rights. This recent violence followed a decade of political upheaval that had already taken its toll on the food security, of what was once, one of the strongest agricultural economies in West Africa. About 200,000 Ivorians remain in asylum after fleeing the violence to neighbouring countries – mainly to Liberia and Ghana. The crisis disrupted the functioning of markets and reduced household ability to access food. Since the end of the crisis in mid-April 2011, the situation has gradually normalized. The supply of water and electricity has been restored in areas that were cut off. Markets and shops have reopened. The administration, banks and schools are resuming gradually.	Rainfall was scarce in the northern part of the country. In 2011 the agricultural sector suffered from reduced labour availability due to civil unrest. Traditionally, export of agricultural products constituted one of the main sources of revenue for Côte d'Ivoire.	Most food prices in Abidjan have fallen between April and May, following the cessation of hostilities and improved security. Even so, a few products have risen in price during this period, including imported rice **(+17%)**, corn **(+13%)** and cassava **(+25%)**. Compared with May 2010, vegetables are cheaper. Palm oil producers are currently benefiting from better access to food and higher purchasing power. In May 2010, producers could get 25 kg of local rice by selling a can of 20 litres of palm oil in the west. The sale of the same palm oil in May 2011, buys the producer 34 kg of rice.	Household food consumption has declined as incomes have fallen. In the town of Yopougon in Abidjan, **28%** of households do not consume more than two meals a day. On average these households consume 1.7 meals a day compared with 2.7 before the crisis. Household's food diversity is fairly low, consisting mostly of just rice or yams, with very few households eating meat or fish. Income earning opportunities are limited, hence many households are resorting to selling charcoal and firewood to cope.	Local health centres are successfully curbing rates of malnutrition by early detection and treatment of moderate and severe malnutrition, as well as by providing micronutrient supplementation (iron and vitamin A). The nationwide nutrition survey shows that global acute malnutrition (GAM) among children under 5 varies between **2.7** and **7.7%**; national GAM rates are **5.4%**. The survey classifies GAM levels in the Centre-North, South-West, Centre-West, North, North-West and in the North-East as "precarious", as they are over **5%** threshold. In the rest of the regions surveyed, GAM levels were rated "acceptable". Prevalence of chronic malnutrition among children under 5 varies from 11.1 in the south to **43.6%** in the north (rates above **40%** are considered critical). Nationally, chronic malnutrition rates are **27.3%**.	Overall food security has deteriorated because of the political crisis, which has also seriously disrupted trade flows, pushing up food prices in several regions. Many households have limited access to food due to disruption of their livelihoods. The situation is more critical among IDPs, host families and other vulnerable households. The WFP and FAO food security assessment in July revealed continuing food insecurity in the western, southern and north-eastern regions, caused by the long stay of IDPs in host families and the rising prices of basic foods. The WFP VAM mission conducted in the west in August recommended continued assistance to IDPs, returnees and vulnerable communities affected by insecurity, access to crops and market conditions.
West Africa	GHANA	In recent years, Ghana has achieved robust economic growth through expansionary fiscal policies, strong agricultural performance, buoyant remittances, good growth in the services sector, the good performance of the gold sector and its continued attraction of new investment (AfDB). However, even though the Ghanaian economy was able to weather the first round of the global financial crisis, there are signs of economic slowdown during this second global crisis and recession. In early 2011, floodwaters damaged an estimated 6,000 hectares of cultivated land, affecting 35,000 people across the country; most localised crop damage was reported in the south.	Poor rainfall hindered normal planting and the germination of field crops such as maize and groundnuts in the western stretch of the Northern Region, covering much of Central Gonja, West Gonja, East Gonja and Sawla-Tuna-Kalba. In the key early millet growing areas of the Upper East Region, comprising Talensi-Nabdam, Bongo and Bawku West, farmers were unable to plant the crop because of late rains and they are likely to endure a prolonged lean season this year.	In the second quarter of 2011, the national price of cassava rose by **19%** and maize went up by **18%** compared with first quarter. Cassava is **110%** more expensive than the five-year average, and maize prices are **129%** higher. Overall terms of trade have improved for livestock owners and deteriorated for labourers. In the Upper East region, while the share of household income from selling agricultural produce continues to shrink, the share of income from selling livestock rose from **35.7%** in April to **56%** in May. The favourable terms of trade for goat/maize grain, which is attributed to stable livestock prices, allows for purchase of more maize. In the Upper West Region, the average price of maize in sentinel sites has increased by **16%**, so the labour/maize terms of trade fell from 9.6 kg in February 2011 to 8.7 kg in June 2011.	In May 2011 in the Northern and Upper West regions, there was enough grain to meet household food consumption needs. This is thanks to above average reserves from last year and as a result, 94 percent of sentinel site households were consuming food from reserves of their own produce. However, vulnerable households whose reserves are rapidly depleting are managing the situation by reducing the quantity of food consumed and the number of meals, as well as limiting the diversity of food consumed. In the Upper East region, the recent increase in the price of kerosene and liquefied gas has driven more households to rely on wood fuels, thereby increasing demand for firewood and charcoal. As a result, coping strategies such as selling fuel wood remained viable in May 2011 for poor households.	Trends from November 2010 to June 2011, show an improvement in 12 districts in the Northern regions. The proportion of underweight children fell in from **30** to **24%**, and in the Upper West Region from **19** to **17%**. In contrast, malnutrition trends during the same period increased in the Upper East Region. The proportion of underweight children increased from **15** to **21%**.	The food security situation is stable following the good 2010 harvests of cereals, tubers and legumes. The mixed start to the season, characterized by the sporadic rainfall pattern, could restrict the availability of grain at the peak of the lean season, and a poor harvest is expected if the season does not improve. This could make market traders hold back their stocks in anticipation of future price rise.

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West Africa – LIBERIA	Having emerged from 14 years of civil conflict in 2003, Liberia held its first democratic elections in 2005. Some positive economic progress followed, but the 2009 global financial crisis slowed growth and increased unemployment in the country. Even so, Liberia's short-term prospects remain positive (AfDB). Liberia had to host 188,000 refugees who were forced to flee their homes in Côte d'Ivoire during the post-election violence. Although the major conflict in Côte d'Ivoire ended in April 2011, the political unrest had lasting consequences and continues to impact the food security situation in Liberia. Most of the refugees are currently in Nimba, Grand Gedeh and Maryland counties, which are among the most food-insecure areas of the country.	There has been considerable rainfall in August but it has been poor and unevenly distributed. Coastal areas of the north and the western part of the country (including Monrovia) have seen excessive rains while southern parts have experienced dryness. The northern and western areas that suffered significant damage to rice needed to replant, consequently delaying crop development. There is a widening food deficit in Liberia. Cassava production has suffered massive post-harvest losses. while Rice production has fallen **64%** short of consumption requirements. Liberia has hence had to bridge the food gap by importing rice, both commercially and through aid assistance.	In the second quarter of 2011, the price of butter rice rose by **5%** compared with the first quarter, while the price of palm oil remained stable. Compared with the five-year average, butter rice prices are **74%** higher, and palm oil is **164%** more expensive. Despite stable global rice prices, domestic rice prices are increasing steadily and remain substantially higher than pre-2008 levels. The purchasing power of casual labourers declined between March and April. Inadequate employment opportunities and low wages; the latter, a consequence of the massive influx of refugees from Côte d'Ivoire. The host communities are offering refugees job opportunities at a lower wage rates. Following growing international demand and increasing global rubber prices, the terms of trade for rubber producers improved in April 2011 compared with the previous year, especially for smallholders in Grand Bassa, Margibi, Maryland and Nimba counties.	According to a January 2011 WFP monitoring assessment conducted in Nimba and Grand Gedeh, daily food intake has fallen to one or two meals a day, instead of the typical three meals consumed this time of year. This is because of the rapid erosion of household incomes coupled with the increased pressure on host communities' already meagre food stocks. In May 2011, **60%** of host families and **70%** of refugee families were using some form of adverse coping strategy. While both groups deploy strategies such as reducing the number of meals, borrowing food and skipping meals, refugee households are more likely to skip meals more frequently than host families.	The global acute malnutrition (GAM) rate among refugees increased from **13%** in December 2010 to **13.7%** in February 2011. It rose from **1%** to **5.8%** for the host population over the same period.	Overall food security conditions are worsening, especially in the southeast. The highest concentration of food-insecure households is in rural regions close to the border with Côte d'Ivoire. The refugee influx is straining the already limited basic services and resources. Trading routes between Côte d'Ivoire and Liberia have been disrupted, further reducing food availability and pushing up prices. Furthermore rising transport costs and restricted movement of commodities continue to keep the urban poor vulnerable. Household food security is hence likely to continue to deteriorate unless immediate mitigation measures are put in place.
West Africa – MALI	Despite the progress achieved over the last decade, Mali's economy remains fragile as it still faces significant challenges in key development sectors. Most of the rural population is dependent on subsistence farming and livestock herding, which are restricted by limited arable land, natural disasters (drought, locust infestations and floods), environmental degradation and fluctuating commodity prices. This situation keeps the country constantly at risk of food insecurity and malnutrition.	Good cereal production and favourable harvests in the neighbouring Senegal, Burkina Faso and Guinea have created generally satisfactory food availability during the 2010/11 season. In July 2011, below average rainfall slowed down agricultural activities in the Western Sahel, particularly in the northern areas of the Kayes, Koulikoro, and Segou regions as well as in the southern areas of the Sikasso, Mopti and Timbuktu regions. Initial forecasts for the current agricultural season are good, although lower than 2010/11 levels.	In the second quarter of 2011, millet prices fell by **2%**, while imported rice increased by **4%** compared with the first quarter. Millet is **15%** more expensive than the five-year average, while imported rice is up by **40%**. Terms of trade for goats/millet are well above the five-year average, particularly in the Gao and Kidal regions where animal prices are higher and grain prices are declining to stable. Touareg populations in northern Mali have seen their incomes decrease, especially those dependent on migrant remittances from Libya. Nevertheless, the good 2010/11 harvest created a high demand for local labour, which has partially offset the loss in income. Between January and June 2011, poor and very poor households obtained lower incomes from local jobs (guarding and tending animal herds, making bricks, and building homes).	In rice-growing areas of Mopti during December 2010 and February 2011, larger than usual supplies of rice were brought home by workers paid in-kind. This increased household food reserves and contributed to a more diversified diet.	Between January to March 2011, most households had a normal food intake, resulting in low malnutrition rates which are in line with seasonal averages at this time of the year.	The food security situation has improved as a result of good food availability, stable prices and improved terms of trade. The continuing return of Malian nationals and refugees from Côte d'Ivoire is likely to increase food expenditure for host families and reduce purchasing power, especially among poor and very poor households. The repatriation of Malian workers living in Libya might also reduce the income of thousand of households who rely on remittances.

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West Africa	NIGER	The 2009 drought and crop failure, compounded by flooding in August 2010, had a very adverse and long-lasting impact on household assets and savings, on levels of indebtedness, and on the health and nutritional status of the population. The recent massive influx of returnees fleeing Libya and Côte d'Ivoire has severely undermined the food security situation, leading to loss of remittances, increased demand for food, and a lack of employment opportunities particularly in Tahoua, Maradi and Zinder.	The rainy season typically starts between May and July in most farming areas. The success of the current agricultural season appears uncertain; despite abundant rains in some parts, many areas have seen erratic rainfall, causing pockets of drought and wilting early crops. It was forecasted that the August and September rains will not allow renewed sowing. The 2011/12 cropping season began with significant delays in sowing and early crop development, particularly in the west of the country.	Rice is mainly imported, and prices are now substantially higher than in June 2010 (**22%** more in Agadez), reflecting higher fuel prices and increased transport costs. Terms of trade between livestock and millet prices are 10 to **40%** higher than in July 2010. The purchasing power of farmers who cultivate onions for export has been hit by the political unrest in Côte d'Ivoire. In Galmi/Tahoua market, 1 kg of onions was being exchanged for 0.91 kg of millet in May 2011; in April it was exchanged for 1.95 kg, and in March, 3.13 kg.	In January 2011, around **17%** of the population were estimated to be severely or moderately food insecure, mostly because of limited access to food. The deterioration in food access caused a larger than usual percentage of the workforce – in many cases, entire households – to leave for Nigeria (specifically to Jigawa State). In addition, the lack of income generating activities in June 2011 has been prompting households to resort to coping strategies that involve sending some members to work in wealthier areas, to the detriment of family farms. Households in Bilma, Magaria, Madarounfa, Guidan Roumdji, Tessaoua, Tchintabaraden, Madaoua, Gouré, Tanout, Bouza, and Illéla have reduced food intakes and/or skipped meals as a main coping mechanism. This is because their grain and fodder reserves are depleted and their purchasing power is weaker due to the current shortage and below average wages.	The national GAM rate in Niger fell from 1**6.7%** in June 2010 to **12.3%** in June 2011. However, chronic malnutrition rose from **48%** to **51%**, according to the yearly nationwide nutrition survey. The survey results also revealed the continued high vulnerability of children in Niger to both acute and chronic malnutrition, with children aged between 6 and 23 months being particularly vulnerable. Admissions of malnourished children to therapeutic feeding centres rose nationally by an average of **31%** between April and May 2011 because of food shortages in some departments.	The unrest in Côte d'Ivoire and Libya has depleted household cereal stocks as a result of higher food and fuel prices, and of lost remittances, particularly in communities dependent on them. It has weakened purchasing power and pushed wages below usual levels, which is generating food insecurity in the agro-pastoral and pastoral areas of Niger.	↘
	MAURITANIA	Mauritania has limited agricultural potential as **90%** of its land mass is arid. About **75%** of the country's food is imported, thus international price increases continue to influence local food prices. Migration to cities has led to accelerated urbanization and increased urban poverty. The majority of households' assets have been depleted as a result, limiting their ability to recover from shocks. Since July, relations between Senegal and Mauritania have been tense because of political disputes. Consequently, trade and trade routes have been interrupted in Rosso (south-western Mauritania) where the free movement of goods crossing the river into Senegal has been hampered. Both governments are working to reach a solution and re-open the airways and other trade links.	Spring harvests of flood-recession crops have helped to increase grain availability in the western and eastern reaches of the Senegal River Valley and in agro-pastoral areas. However, the late onset of rains and the massive flow of livestock from the north (Tagant, Trarza, north Brakna and north Gorgol) have deteriorated food security in pastoral areas.	During the second quarter of 2011, the price of wheat rose by **6%** while that of imported rice fell by **1%** compared with the first quarter. Wheat is currently **59%** above the five-year average, and rice is **22%** higher. Price increases at the end of July in diesel **(1.4%)** and petrol **(3.5%)** are likely to impact food prices. Terms of trade are favourable for households selling livestock in agro-pastoral areas. A high demand for livestock in February (associated with the religious holidays) depleted market stocks both in Mauritania and Senegal, shifting the demand for small animals. Consequently, livestock prices are on the rise, while prices for locally grown grain crops are declining sharply.	Government-subsidized shops selling food at reduced prices are improving household consumption, especially for middle-class customers who have consistent purchasing power. The outbreak of Rift Valley Fever is reportedly under control; households in Adrar and Inchiri have a renewed sense of confidence and have resumed drinking milk and eating meat. Households in most food-insecure areas have reported cutting food intake, consuming less preferred foods, skipping meals, and migrating en masse.	The GAM prevalence recorded in January 2011 was highest in the northern region of the country.	Food security has slightly improved as a result of the current harvests of flood-recession crops and good agricultural performance, as well as improved terms of trade for pastoralists. Household food security is consistent with normal seasonal trends, except among the poor of the central river valley, the western agro-pastoral zone and the southeast. Current conditions are expected to improve progressively between July and September, as favourable rains are forecasted.	↗

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Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
West Africa	SENEGAL	Agriculture is among the most important economic sectors in Senegal, providing a livelihood for over half the population. The country produces close to half of its food needs and imports the rest. It also has a growing industrial sector, one of the largest in West Africa. Nevertheless, the country has suffered prolonged droughts, which together with deforestation, the use of chemicals and fertilizers, and soil salinization, have caused severe land degradation. Indeed, poverty in Senegal is largely rural with 60 to **70%** of poor households living in these areas. However, urban poverty is still significant at **30** to **50%**, while the country is still recovering from the impacts of the 2008 high food prices crisis. The Casamance region located in the southern part of the country has seen ongoing conflict since the 1990s over the question of the region's independence.	Agricultural production is strictly linked to rainfall; as such, the harvest season usually takes place from September to November. Senegal experienced two consecutive record harvests in 2009/10, where production was estimated to be **29%** above average and just **5%** below the bumper crop of the previous year. The country also had sufficient levels of rice and maize imports in the first half of 2011. However, the current agricultural season is causing concern because the rains, previously expected in June, arrived late.	The price of imported rice has remained unchanged in the second quarter compared with the first; prices are **8%** higher than in 2010 and **34%** above the five-year average. Overall output of off-season harvests, mainly rice and garden products (tomato and onion), are improving purchasing power by providing an important source of income and food for most rural and peri-urban households across the Senegal River valley and Niayes region.	During the current lean season (May to October), poor households are using adverse coping strategies such as reducing meals and/or the quantity of food consumed.	According to DHS-MICS of 2011, malnutrition trends worsened, with GAM rates of **10.5%** reported. Note that malnutrition is mainly concentrated in the eastern part of the country (Matam and Tambacounda) and is mainly caused by poor hygienic, traditional beliefs and poor care practices.	Food insecurity remains prevalent particularly in the Casamance and eastern part of the country. Ziguinchor region records the highest prevalence of food insecurity with **46.6%** of rural households having poor food consumption. As the lean season peaks, the food security situation is likely to slightly deteriorate in the next 3 months because of depleting stocks and an uncertain harvest.	↘
Middle East, North Africa and Central Asia	EGYPT	Egypt is the world's largest importer of wheat, as only **3%** of the total land area is arable. Most imports go towards a government food subsidy programme. Hence increased expenditure on the subsidies in the wake of rising wheat prices has put a heavy strain on government budgets. Economic growth previously above **5%** in 2009/10 is expected to slow down due to recent political developments and the economic downturn. Furthermore, the ongoing conflict in Libya caused an estimated 206,000 people to return, or flee, to Egypt. By the end of June, about **50%** were Egyptians, Libyans **(10%)** and third-country nationals **(38%)**. However, most Libyans began to return to their country between June and July.	Around 1.3 million hectares have been planted with wheat in 2010/11, **5%** more than the previous year. Overall wheat production is expected to reach 7.9 million mt in 2011, which is **11%** higher than in 2010 and similar to the five-year average. The rise is partly due to the increased use of improved seeds. Egypt imported an estimated 10 million mt of wheat in the 2010/11 marketing year, in line with the average of the previous two years (FAO). Over **50%** of imports are from Russia. The Russian's export ban on wheat, although recently lifted, made wheat imports considerably more expensive during the past year.	The high cost of imported wheat was not immediately felt by consumers due to the country's safety net programme. However, price increases in non-subsidized wheat flour have pushed up the price of other wheat products. The year-on-year rate of inflation was estimated at **11.5%** in April 2011 compared with **10.3%** in December 2010. Nonetheless, the inflation rate has remained well below the peak in August 2008 **(23.7%)**. The tourism and construction industry in Egypt were particularly hard hit by the uprising, which undermined household purchasing power. Households with migrants returning from Libya have seen a reduction in their remittances. However, the government has announced a **15%** increase in salaries in response to the socio-political unrest.	Access to food continues to be limited by high food prices, but the government subsidy programme has mitigated the overall impact of rising prices: around **80%** of the population benefits from ration cards and every household has access to subsidized bread. Even so, areas with many returnees from Libya, such as Lower and Upper Egypt, are likely to suffer poorer food access as a result of lost remittances and the increased pressure on the local labour market.	Health & Nutrition information was not available for this reporting period.	Food security will continue to be affected by rising food and fuel prices, as well as the ongoing fragility of the political and economic situation in the Middle East which has displaced populations and disrupted food supplies. The food subsidy programme has protected a large portion of the population from the impact of rising food prices. However, the government programme is hampered by low stocks: cash flow problems persist because of the continued depreciation of the Egyptian Pound and high wheat prices.	→ ⚠

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Food Security Trends (January-August 2011)

WFP
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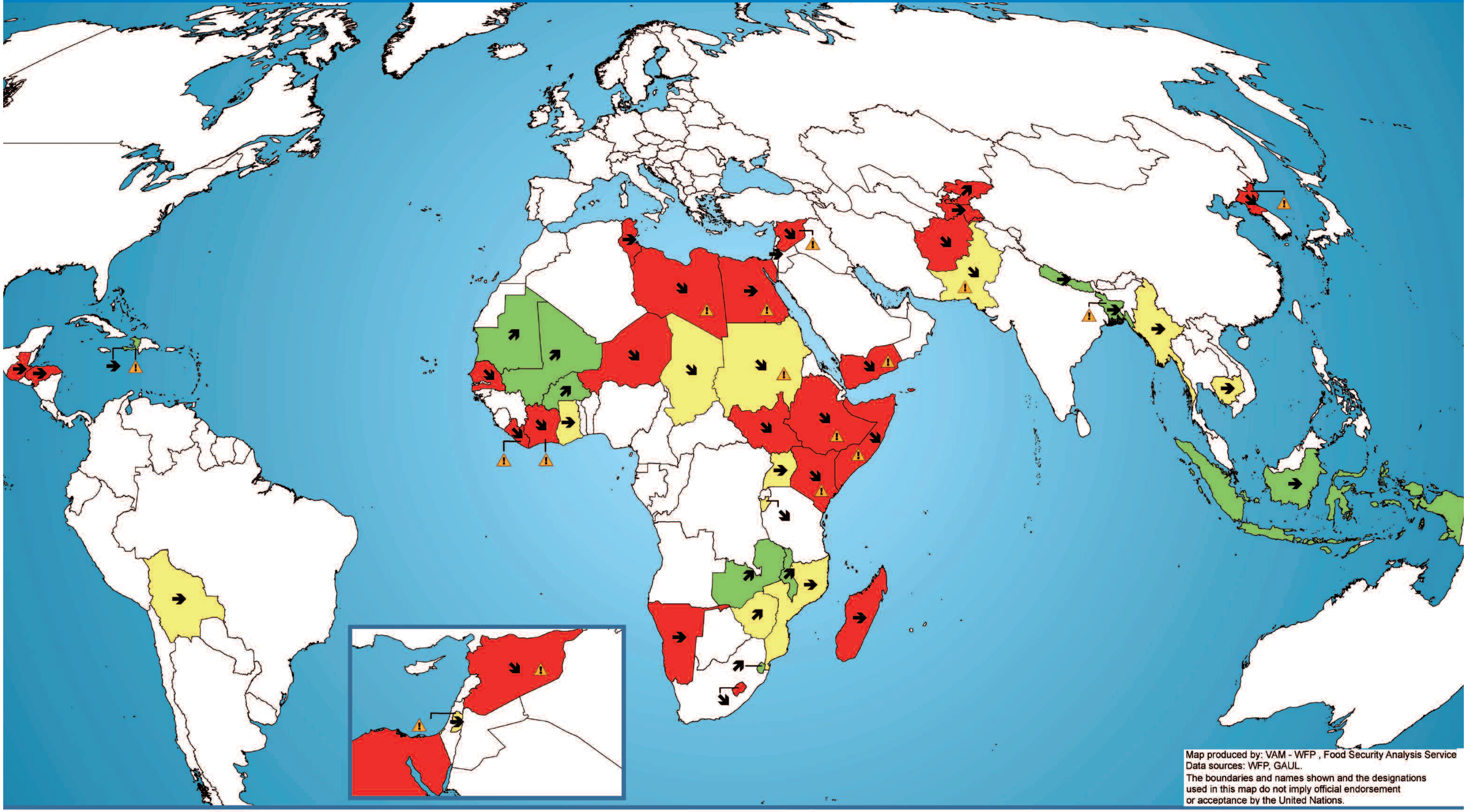
food security analysis



Food Security Trend (January-August 2011)
- Improving
- Stable
- Deteriorating

Food Security Outlook (3 months)
- Improving
- Stable
- Deteriorating

Alert
Countries to be closely monitored

Countries (A)	Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
Middle East, North Africa and Central Asia							
KYRGYZSTAN	Kyrgyzstan is prone to various natural disasters, including earthquakes, floods, landslides, and winter avalanches and snow storms. It is a mountainous landlocked country dependent on wheat imports to meet one quarter of its consumption requirements. In 2010, Kyrgyzstan saw violent civil unrest in the capital Bishkek and the southern provinces of Osh and Jalalabad. Protests were fuelled by discontent with the government, continuing poverty, unemployment, and widening socio-economic disparities. The clashes came on the heels of the devastating 2008/09 global food, fuel and financial crisis, but the socio-political situation has been stable since the middle of 2010.	Areas cultivated with wheat have decreased by **27%** between 2002 and 2010, reflecting a significant shift towards more profitable crops such as oilseeds and cotton. In 2010/11, the area planted with winter cereal crops (mainly wheat) fell by **4%** because of erratic rainfall during the October to November planting period. Production is forecast to decline. Winter wheat normally accounts for **60%** of annual production. Rainfall was adequate during the April to May 2011 spring crops planting season. Total cereal production is set to reach 1.5 million mt, about the same level as last year. **30%** more land has been sown with oilseeds and cotton. Cereal import requirements, mostly wheat, are estimated at 437,000 mt for the 2010/11 marketing year. This is **20%** higher than last year because of an increase in consumption needs and stock replenishment, combined with stable cereal production.	Between the first and second quarter of 2011, prices of wheat - the main staple -increased by **7%** and they were **40%** higher than the same period last year. On the other hand, milk prices are **11%** lower compared with last year. Kyrgyzstan, like other neighbouring countries, has been affected by Russian and Kazakh export bans on petroleum products, and by Russian ban on wheat export which have led to higher fuel and food prices. Remittances play an important role in the country: total remittances rose by **25%** in 2010 as the Russian economy recovered from the 2009 global financial crisis. Russia was the source of **90%** of the total value of remittances in 2010. Household purchasing power has fallen as a result of the rise in main staple food prices, which has not seen a commensurate improvement in the minimum wage and pensions.	An emergency assessment in February 2011 found that **26%** of households were consuming an inadequate diet (**8%** of households had poor food consumption and **18%** had borderline consumption). These proportions are higher than those of August 2010 in the midst of the crisis, which shows that even though the political situation has stabilized, households are still struggling with the aftermath of the conflict and the seasonal exhaustion of food stocks during the winter months. A quarter of severely food-insecure households were found to use negative coping strategies to meet food shortfalls, such as spending days without eating, skipping meals and reducing meal size. These strategies pose health and nutritional risks.	Health & Nutrition information was not available for this reporting period.	Despite the stable security situation, food security has deteriorated because of rising food prices and households' diminished capacity to cope in the aftermath of the crisis. More than 760,000 people are said to be severely food insecure, mainly in Osh, Jalalabad, Batken, and Chuy. The situation is expected to improve with the wheat and potato harvest this quarter and the lifting of the Russian export ban on wheat.	↗
LIBYA	Oil-rich Libya, which generally enjoys a high standard of living and a robust per capita daily intake of 3,144 kcal is currently undergoing great social and political upheaval. Her land area comprises over **90%** desert which makes the country highly dependent on food imports; it imports about **80%** of its consumption requirements. The livestock sector also relies heavily on subsidized imports of animal feed. Civil conflict which started in mid-February with the popular uprising in Benghazi continues to lead to internal displacements and an exodus of more than half a million migrant workers into neighbouring Tunisia, Egypt, Niger, Chad and Algeria, with others arriving by sea to Italy and Malta. Many IDPs are reported to be in need of food assistance, particularly in eastern and western Libya.	Weather and vegetation conditions have been generally adequate since the start of the growing season last October (2010). The main limitations on agricultural production and the livestock sector are the massive departure of foreign workers, which has reduced the availability of labour, and inputs due to interrupted supply channels and suspended access to the agricultural subsidy system, particularly in opposition-controlled areas. Consequently, agriculture and livestock production is expected to decline this year.	Inflation is forecast to rise to **6.1%** in 2011 based on the assumption that the ongoing conflict and increased international food prices will create large food shortages. In all areas visited, fuel shortages were a big problem, causing the closure of some petrol stations and queues at others. In government-controlled areas, a fuel consumption quota system is in place. Public transport costs have tripled, restricting access to services such as hospitals. Payment of civil servants in the government-controlled areas may have been delayed, while the transitional National Council in opposition-controlled areas lacks funds to pay civil servants. **70%** of the labour force is employed by the state.	The ongoing social and political turmoil is restricting food access for large numbers of people in the western parts of the country. According to recent rapid assessments, the conflict has disrupted supply links, leading to shortages of food and other basic commodities. Food stocks are rapidly being depleted in the absence of any pipeline to replenish them. In Nafusa Mountains, food security gaps and medical needs are of special concern.	There are health and nutritional concerns, following the disruption of various social services; water supplies are currently disconnected in major eastern cities, while health facilities have suffered a lack of medicinal supplies and the departure of health staff. In eastern Libya, many clinics relied on foreign staff who have since fled the crisis.	Due to the continuing unrest, the food security situation is deteriorating, with significant and protracted implications within and beyond the region. Massive population displacement and the disruption of food supplies have reduced food availability and physical access to cooperatives and shops. Rising food prices have limited access even further; the most vulnerable households are those internally displaced (national and foreign migrants), residents living in conflict zones or in areas that have been cut off from trade links, and households depending on income from the public sector.	↘

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Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
Middle East, North Africa and Central Asia	OCCUPIED PALESTINIAN TERRITORY	Due to protracted conflict, the occupied Palestinian territory (oPt) faces serious socio-economic challenges. Israel's blockade of the Gaza Strip, in place since 2007, has included extreme restrictions on the entry of goods and movement of people, as well as a virtual halt to exports. Since 2008, access to **35%** of the Gaza Strip's agricultural land and **85%** of its fishing zone has been curbed, severely damaging livelihoods. Three quarters of the Gaza population continues to depend on assistance. In the West Bank, slight improvements in the socio-economic status are likely due to increased economic growth, continued donor support and some easing of Israeli restrictions. However, the sustainability of these improvements is still unclear given the high dependency of the economy on external budgetary support as well as the lack of sovereignty over imports and exports.	The sporadic and delayed rainfall in the West Bank during the 2010/2011 rainy season has impacted the wheat and barley harvests in most of the West Bank. Hebron and Governorate have been the worst affected, receiving just **45%** of their normal rainfall. As a result, only **60%** of the agricultural areas have been planted, leading to a **40%** cereal loss compared with the long-term average. However, local production of wheat covers just **4%** of Palestinian consumption requirements, and local pulses cover just **2%**. Being a net food importer, oPt is highly vulnerable to fluctuations in global food prices and income.	The Consumer Price Index (CPI) rose rapidly between 2007 and 2008/2009. It shot up again in 2011 as a result of the high food and fuel price increases on the international market. Between the first and second quarter of 2011, the price of wheat flour remained stable but was still **47%** above the five-year average.	In the West Bank, **11%** of households had poor food consumption and **18%** had borderline consumption. In the Gaza Strip, **10%** of households had poor food consumption while **19%** were borderline. Food assistance remains a crucial complement to the food basket for food-insecure households, enabling them to have an adequate diet in terms of quantity and diversity. In June 2011, the proportion of households that consume foods of lower quality increased from **32%** to **52.5%** when compared with June 2010. Expenditure levels at the household level did not change.	The movement of people from Gaza through the Erez crossing continues to be blocked thus affecting people requiring medical care. Medical equipment, supplies and spare parts are all difficult to obtain, while services such as water and sanitation cannot be improved or even properly maintained.	High levels of food insecurity persist in the Gaza Strip. A study carried out in March 2011 found that food insecurity remains unchanged at **54%** compared with 2010. In the West Bank, food insecurity affects **22%** of households, and only the situation in the Central West Bank has improved. Food-insecure households are still characterized by low levels of income because of a lack of jobs, business and investment opportunities.	→ ⚠
	SYRIA	A strategic country in the Middle East, Syria has been hit by a wave of civil unrest known as the 'Arab Spring'. The protest started in Tunisia and spread to Egypt and other Middle East and North African (MENA) countries. Since the unrest started on 26 January, the security situation has been deteriorating rapidly, The protests had escalated to an uprising by 15 March 2011. There are reports of violence against civilians; however, restricted access has made it difficult to adequately assess humanitarian needs. By June 2011, at the peak of the crisis, over 20,000 Syrians had fled to Turkey, Lebanon and other neighbouring countries. Syria has suffered from four years of consecutive drought, particularly in the north-eastern regions. The country also hosts one of the largest urban refugee populations in the world, composed of one million Iraqis.	The rainy season started 3 to 4 weeks late at the beginning of December, and dry spells persisted during the first three months of 2011 in most areas. Crop production is therefore expected to be below average. The overall wheat and barley production is estimated to be **9%** below last year's output. Wheat and barley imports are still **10%** lower than in 2009/10 when stocks were replenished to offset the impact of the drought-damaged 2008/09 winter season crops. This year, rice imports are forecast to be 330,000 mt, similar to the high levels of the previous two years. Consistently high levels of imports are partly in response to the additional demand from the large Iraqi refugee population.	Food price inflation reached its peak in December 2010, and in January 2011 it was nearly twice **(13%)** the January 2010 level **(7%)**. Since then, prices have started to decline and in March 2011, the overall food price index fell by **3.7%**. Prices fell for vegetables **(-8.7%)** and meat **(-2.7%)**. The price of bread and cereals remained stable.	Information on Food Consumption & Coping Strategies was not available for this reporting period.	Health & Nutrition information was not available for this reporting period.	In the context of the current political and social unrest, economic growth is likely to drop by at least **1%** this year, with implications for the medium and longer-term food security trends in the country. Food prices may also rise if the unrest disrupts distribution channels and causes severe localized food shortages in the main markets.	↘ ⚠

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Middle East, North Africa and Central Asia	SUDAN	South Sudan gained independence from Sudan on 9 July 2011. The new nation stands to benefit from inheriting the bulk of Sudan's oil wealth. However, in the short term, continuing political disputes, regional conflicts and a lack of economic development may increase the food insecurity of both countries. Sudan continues to be affected by the conflicts in Darfur which has created two million IDPs. An estimated 1.7 million people have by been hit by drought in parts of Darfur, North Kordofan, Red Sea, Blue Nile, White Nile and Kassala states. In addition, 30,000 Sudanese have returned from Libya following the recent crisis in North Africa.	The 2010-2011 harvest was above average due to favourable rainfall in 2010. This year, the rainy season was characterized by markedly below average rainfall across east, central and west Sudan. This coincided with the critical planting period and is raising concerns over the next harvest. Heavy rains at the end of July somewhat improved the situation; however, there are still large dry areas and favourable rains are needed until the end of the season in order to offset the effects of the poor early season performance.	The price of sorghum has generally declined in the second quarter compared with the first, except for South Kordofan which has seen increased insecurity and price increases of **18%**. Across Sudan, prices are way above the five-year average, particularly in South Darfur where they are **179%** higher. In North, West and South Darfur, the terms of trade between a 90 kg bag of sorghum and one male adult goat increased in favour of livestock owners. In May 2011, the cost of the minimum healthy food basket per person is between **10** and **17%** more expensive compared with February 2011 in all three states.	In Darfur, the food consumption score has remained relatively stable compared with February 2011, with slight changes across the different states and community groups. In West and South Darfur, food consumption has improved considerably among IDPs in camps. Moreover, in North Darfur, the situation for IDPs has also improved, with a shift of households from the poor to the borderline food consumption category. At the same time, the use of adverse coping strategies has increased in May 2011 compared with February 2011. In the lean season, with limited options for income generating activities, a higher percentage of households are forced to adopt some type of coping strategy. The most significant change was observed in IDP camps in South and North Darfur (**23%** recorded using high coping) and in the mixed communities in North Darfur.	Malnutrition based on MUAC among IDPs in Darfur states remained stable between February and May 2011, but the situation is better than the same period last year. There has been a slight deterioration among the mixed communities in West and South Darfur states during the same reporting period. Across the states, **2%** of IDP children have been classified as malnourished, with figures in both North and West Darfur reaching **6%**. Nine percent of children are moderately malnourished in South Darfur.	Overall food security has deteriorated in Darfur despite the good 2010/2011 season and improved terms of trade for livestock owners. This is because of the increased cost of the minimum healthy food basket, which has led to a drop in purchasing power among all community groups in Darfur. Food security is likely to deteriorate over the lean season (August to October) because of reduced household food stocks and the seasonal rise of food prices generated by transport problems during the rainy season. Food security in Abeyi and South Kordofan will remain fragile in the next season because the security situation will restrict local cultivation.	↘ ⚠
	TAJIKISTAN	Tajikistan achieved peace after 1997, having suffered a brutal civil war immediately after independence (1992 to 1997). Early emigration was motivated by the war, while more recent migration has been caused by economic factors. Remittances from migrant labour have therefore been one of the drivers of Tajikistan's robust economic growth. These remittances, key to poverty reduction, are expected to increase this year because of Russian economic growth which is set to reach **4.4%**, resulting in more job opportunities and higher real wages. Even so, Tajikistan still has high levels of poverty and remains the poorest of the CIS countries and among the most fragile in socio-economic terms. In May, the government allocated US$58 million to food and fuel subsidies to mitigate the effects of high food and fuel prices.	Seasonal snow/rainfall were below average between October 2010 and March 2011. In many cities this had a negative impact on the first major cropping season (winter wheat, barley, rice, maize, and cotton) and on the planting of the second season summer crops (wheat, barley, some maize and cotton). Higher than usual locust infestations damaged 153,100 hectares of agricultural land, brought by above average temperatures over the spring period. Last year 86,000 hectares of land was infested by locusts. Early forecasts predict a smaller 2011 crop production in several districts; wheat output is set to be **20%** lower and maize **17%** below the bumper output of the last two years. Wheat production is expected to fall by 200,000 mt in the 2010/11 marketing year compared with the previous year, which will be partly offset by greater wheat imports of 120,000 mt.	Between April and June, national wheat prices rose by **14%** compared with the previous quarter. Wheat is currently **245%** above the five-year average. This rise is driven by more expensive wheat imports from Kazakhstan and higher fuel prices in Russia. Tajikistan relies on Russia for its petrol supply. In May, the Russian government increased petrol export duty by **44%**, pushing up fuel prices in Tajikistan. Remittances from Russia play an important role in the country. Around **67%** of families use remittances to buy food, which helps to offset the effects of the high food prices. The amount of remittances between January and May 2011 were between **28** and **31%** higher in value than in the same months in 2010. This is attributed to the increased demand for labour from the growing Russian economy.	In March 2011, **10%** of households had poor food consumption, slightly higher than in December 2010 **(7.5%)**. The Coping Strategy Index in February 2011 was lower than that of the same period last year (showing a reduction in use of adverse coping mechanism).	Health & Nutrition information was not available for this reporting period.	During the first semester, the food security situation has worsened despite improvements on last year. This deterioration is the result of increasing food prices and the seasonal depletion of food stocks. The situation is particularly worrisome for households who are mainly food buyers and for those living in the remote areas of the Rasht and Zarafshan Valleys. The situation is expected to stabilize after the first harvest season in July and the second harvest season in September. The lifting of the wheat export ban by Russia in July, along with the upcoming harvest in northern Kazakhstan, should also stabilize the situation.	→

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Middle East, North Africa and Central Asia	TUNISIA	Tunisia is a food-deficit country where agricultural production varies markedly from year to year according to weather conditions. It relies heavily on wheat imports, making it susceptible to global price fluctuations. Social unrest which started in January spread through the country and continued until April 2011. Public discontent was fuelled by high levels of unemployment, corruption, poverty, increasing food prices and limited political participation. The unrest soon spread to surrounding countries in the region, including neighbouring Egypt, Libya, Yemen and Syria. Since the outbreak of the crisis in Libya, Tunisia has received over half a million people fleeing the conflict, including migrant workers and asylum seekers. Over 40,000 Libyan refugees were registered by UNHCR, hosted largely in the country's poorest regions where unemployment and poverty are above the national average.	Insufficient rains affected crops in parts of the country in January and February, while increased rainfall from March boosted yields and improved crop prospects in the main crop-producing zones. Wheat production in 2011 is however expected to be more than double last year's drought-affected crop.	The inflation rate in the food sector remained largely stable in the first quarter of 2011. The year-on-year inflation rate was **3%** in April 2011, which reflects the average fluctuation between 2003 and 2009. Prices in Tunisia have slightly risen because of increases on international markets. The cost of the main staple, imported wheat, is therefore higher. Rice, maize and other grains are also more expensive. Purchasing power for the large influx of refugees has deteriorated as they have lost productive assets and income sources. Most refugees are government employees but their bank accounts have been frozen and salaries suspended. Tunisian households have also suffered a reduction in income from remittances.	Libyan refugees, dependent on food assistance, have had to eat less traditional and less diversified diets: less meat and milk, mostly pasta and less couscous, fewer vegetables and almost no fruit. To cope, refugees are progressively exhausting their limited cash reserves, selling jewellery or mobile phones, borrowing, and reducing frequency of meals to just twice a day.	Refugee families are having to purchase mineral water because water from taps in Tataouine town and from wells in rural areas is not potable and is causing illness. Cases of diarrhoea among refugees (adults and children) are regularly reported to the Tunisian Red Crescent medical services. There are no significant reports of malnutrition at this stage; nevertheless, the lack of milk, particularly for infants, is widespread. Almost all young children are receiving less milk than required. These shortfalls, if continued, will lead to malnutrition.	Food security is deteriorating as a direct result of the influx of refugees from the Libyan crisis. Libyan refugees hosted by the poorest communities in the country are at high risk of food insecurity because they depend entirely on external aid. The coming months will see an increase in the burden for both host and refugee communities.	→
	YEMEN	In Yemen, the civil unrest and demonstrations against the government which started in January 2011 escalated towards the end of February and have continued ever since. The country is already torn by protracted conflicts with the northern rebel group, the Southern secessionist movement, and Al Qaeda. This has compromised the ability of households to meet their basic needs, especially for food, water and even fuel. More recent clashes in urban areas have displaced 60,000 people in southern Yemen, Aden, Lahj and Abyan. Yemen imports more than **90%** of its cereal requirements, primarily through the southern port of Aden, so the country is very vulnerable to market disruptions.	This year, the late onset of rains in the highlands and the below normal rainfall in some parts of the country had an impact on the first harvest of sorghum and millet in June. Since then, rainfall conditions have improved and prospects for the second harvest scheduled for September look good. In 2010, Yemen produced a bumper harvest, **40%** above the five-year average. This helped reduce import requirements for 2010/11 by **10%** compared with the previous year.	Oil pipelines were attacked by opposition groups in March, leading to fuel shortages and a subsequent rise in fuel prices throughout western Yemen. Disruptions in market networks have more than doubled food prices in the capital Sana'a compared with the same time last year. On average, imported wheat prices were **77%** higher in June compared with April and they were **117%** above the five-year average. This is having a significant impact on the population's purchasing power since the majority of Yemenis are net food buyers. Even before the crisis, food-insecure households spent one third of their expenditure on bread or wheat flour. The situation is exacerbated by the increasing civil insecurity, coupled with fuel shortages which are disrupting commercial activities and limiting labour opportunities.	With the crisis unfolding, assessment activities have been restricted; however, several monitoring reports have confirmed a severe deterioration in food availability and access. Many households are returning to harmful coping strategies such as reducing the number of meals, eating lower quality food, selling productive assets and going days without eating. Some households have attempted to go to Saudi Arabia in search of work, but the border is closed and has been heavily guarded since the unrest began.	Fuel shortages have disrupted pumping station operations, causing water shortages throughout the country. Many households have no access to water or are relying on unsafe water sources, thereby increasing the risks of disease. In April, a cholera outbreak in southern Yemen caused 1,056 cases of diarrhoea.	The increasing civil unrest has severely damaged food security in Yemen, the poorest country of the region. The provision of humanitarian assistance is impeded in many areas by the volatile security situation and fuel shortages: in Sa'ada, an area suffering from a prolonged conflict, 14,000 households require food assistance but cannot be reached because of a lack of fuel. In the coming months, Yemen is likely to continue to suffer from clashes between the government and the opposition, together with limited food, fuel, and water. Emergency humanitarian assistance will be required to prevent large-scale consumption deficits and a deterioration in health and nutrition.	↘

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Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)
Asia	AFGHANISTAN	Afghanistan continues to suffer the aftermath of several decades of violent conflict, from civil wars to the recent "war on terror". This situation has been compounded by natural disasters and extreme weather conditions. Also, the country's limited infrastructure hampers effective recovery and development. Population displacements have reached record highs, mainly in the south and west. Estimates from June 2011 indicate that 438,000 people have been internally displaced since 2001. These events have left large populations chronically vulnerable to food insecurity, increasing their dependence on humanitarian assistance.	Below normal snow during winter and poor rains during the spring resulted in lower than average harvests and pasture conditions, mainly in the Northern, North-eastern, Western and Central Highlands regions. The lack of rainfall and smaller planted areas in the grain basket of the north and west, means that 2011 wheat production is expected to be **25%** less than the 2010 harvest.	The national average prices of both wheat and rice have gone up by **6%** from the previous quarter. Compared with the five-year average, wheat prices are up by **87%** and rice prices by **30%**. This is due to a newly imposed export tax on commercial goods by neighbouring Pakistan and the continued increases in exported wheat prices from Kazakhstan. Furthermore, wheat production is forecast to be lower as a result of the snow and rain in the winter and spring. Households that rely on casual labour had better purchasing power in June 2011 compared with the first quarter of the year, because of a seasonal increase in wages. The terms of trade between casual labour and wheat prices rose by **6.6%** between May and June 2011, which is when winter wheat is harvested. However, terms of trade are **19.6%** lower than last year. The purchasing power of pastoralists when buying bread and wheat flour deteriorated by **2%** between May and June 2011. It is **22%** lower than last year.	Food consumption and dietary diversity are expected to decline across the country as a result of the increasing insecurity, rising food prices and poor rains. Households dependent on rain-fed wheat and on-farm labour in north-western regions are likely to be particularly hard hit. Traditional coping strategies used by poor households such as migrating in search of labour, selling livestock, and reducing the quality and quantity of food consumed are currently being deployed. These strategies are likely to be exhausted by August (FEWSNET). Afghans are expected to face food shortages and will require food assistance to meet their basic consumption needs. The other vulnerable groups are pastoralists because pasture for livestock has been damaged by the lack of rain.	Malnutrition is a serious problem in Afghanistan. According to the CAP 2011, more than half of children under 5 are stunted, and micronutrient deficiencies of iodine and iron are widespread. It can be assumed that the nutrition situation is getting worse because of low food production, limited access to food, and poor water and health infrastructure.	The overall food security situation has deteriorated because of increased insecurity, the smaller domestic winter wheat harvest and high food prices. An estimated 7 million people are currently food insecure, mainly in the north, northeast and central regions, as well as in Ghor Province. This figure could rise to 10 million as a result of the unfavourable weather conditions. However, an export ban on petroleum implemented by Kazakhstan is due to be lifted in October, which will alleviate high petrol prices. The upcoming maize and wheat harvest in September is also expected to improve the current situation.
Asia	BANGLADESH	Bangladesh is one of the most populous nations in the world, with more than 150 million people concentrated on 144,000 km2. The country sits on the world's largest delta formed by Ganges, Brahmaputra and Meghna rivers, making it extremely vulnerable to floods and cyclones. Floods are an annual threat in coastal areas of the country. The most recent flooding in south-east Bangladesh displaced 10,000 people from their homes in the Cox's Bazar and Teknaf districts, and it affected the livelihoods of half a million people. As the largest rice importer in South East Asia, Bangladesh is also vulnerable to high global food prices. In recent years, food security has been badly hit by rising global food prices.	The 2011 Boro paddy harvest is forecast to reach a record level of 19 million mt, **1.6%** above last year's bumper output (FAO). Boro is the main season for rice, representing **50%** of total annual production Total food grain production for the 2010/11 marketing year is set to exceed the target of 35.7 million mt, which is **8.3%** more than last year. Crop production has increased thanks to favourable weather conditions, the greater availability of subsidized fertilizer and quality seeds, and enhanced electricity infrastructure.	During the second quarter, national rice prices (Boro-HYV-Coarse) fell by **3%** and the price of Atta-Packet fell by **5%** compared with the first quarter. Compared with the five-year average, rice prices are 95 higher and wheat flour prices **43%** higher. The country has also doubled its import targets for this year to stabilise domestic prices, which had hit record highs in December. The rice- purchasing power for agricultural day labourers improved by **18%** between April and June 2011 due to higher labour wages and falling rice prices. Nevertheless, the higher wage rates are seasonal and last only 5 months during the planting and harvest seasons. Female labourers receive significantly lower wages, hence households headed by women dependent on agricultural wage labour are the most vulnerable in Bangladesh.	Generally food consumption and dietary diversity have improved for most population groups, including the most vulnerable. The government has expanded its social safety net programme which provides food assistance through various public food distribution channels. During the 2010/11 marketing year, planned food grain distributions were 2.7 million mt, **2%** more than last year's target.	Health & Nutrition information was not available for this reporting period.	With the exception of flood-affected areas, overall food security in Bangladesh has shown some improvement due to a good harvest and increased government food imports which have helped to stabilise rising food prices. Some decline in household purchasing power is expected during the lean season in September and October. The outlook for the next months will depend on the scale of the seasonal monsoon flooding.

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Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
Asia	CAMBODIA	Despite considerable economic progress in recent years, pockets of poverty and food insecurity remain in Cambodia, particularly in rural areas. The country is also highly prone to severe floods and droughts. At the end of April, clashes along the Thai and Cambodian border at Oddar Meanchey province on the north-west frontier displaced 45,000 people to 13 camps. Following improved security conditions, IDPs returned home in early May. However, the situation remains volatile.	Despite the erratic rains at the beginning of the wet season, paddy rice production has increased significantly. The official estimates point to a record harvest in the main paddy season, forecast to be **3%** higher than the 2010 wet season harvest. This is largely attributed to larger planted areas. In 2011, the net exportable cereal surplus (mostly rice) should reach 1.5 million mt.	In the second quarter, national rice prices fell by **1%** compared with the previous quarter. Rice prices have generally remained stable because of an increase in production in 2011 and moderate export demand from neighbouring Thailand and Vietnam. Rice is however, **13%** more expensive than during the same period last year. The purchasing power of vulnerable households varied in June. While the terms of trade for unskilled wages and low-quality rice in rural areas increased by **3.2%** year-on-year, urban households wages failed to keep pace with rice prices, and their terms of trade fell by **11.3%**. Better purchasing power in rural areas is likely being driven by a higher demand for agricultural labour which is in turn pushing up wages.	Information on Food Consumption & Coping Strategies was not available for this reporting period.	Health & Nutrition information was not available for this reporting period.	The overall food security situation has remained stable due to stable food prices and a greater food supply following the main paddy rice harvest. However, the purchasing power of unskilled labourers has been declining as a result of lower wages, which may harm future food security.	→
Asia	DPRK	DPRK faced a series of shocks in 2010 and early 2011, leaving the country highly vulnerable to food insecurity. In February 2011, a joint FAO/WFP mission forecast that DPRK would face a serious food shortfall and that the Public Distribution System (PDS) would run out of food in May. Recent dramatic flooding has added a new challenge and may further damage this year's agricultural prospects. The situation is likely to be compounded by a cold and prolonged winter, with bitterly cold weather and snow storms driven by north and north-western winds from Siberia. Commercial import capacity is now lower because of falling export earnings as well as higher international food and fuel prices. Food security has been hard hit by a reduction of bilateral food assistance, in particular, by the suspension of assistance from the Republic of Korea.	Extremely heavy rains during the last stage of crop development and harvesting have reduced the quality and yield of paddy and maize. Unusually wet conditions during September/October 2010, insufficient snowfall from November to February, and extremely low temperatures have hampered the germination of winter wheat seedlings and damaged stored seed potatoes. Official estimates place total winter/early crop production, including wheat, barley and potato, at 355,000 mt, which is **33%** below 2010 output and **40%** below 2009 production. The 2010/11 total staple food production is 4,252,000 mt (232,000 mt below the output forecast by the October 2010 CFSAM). Based on the expected commercial import capacity, the 2010/11 food deficit is estimated to be 800,000 mt, more than **20%** of the national food consumption requirement.	Recent increases in international fuel and food prices have damaged the commercial import capacity of the country. The current situation is similar to that of 2008. Official food prices are kept low in an attempt to make them more affordable. Given these reduced prices, the issue is more about the availability of food in the markets. An average worker earns between KPW 3,000 and KPW 4,000 a month. This translates into a dollar a month, which is sufficient provided there is enough food in the PDS. This system is the main source of subsidized food because citizens cannot access grains in the market and they cannot purchase imported commodities directly. If the PDS were to run out of cereals, people would not have the means to purchase cereals on the black market, where a kilo of rice costs KPW 2,000 (half a monthly salary).	Sixteen million people depend on the PDS to meet their staple food requirements. In theory, the average cereal ration is 573 g per person per day. In practice, the ration is adjusted from month to month depending on availability. For 2011, the average ration level is 381 g per person, which is **54%** of the minimum daily energy requirement. Even at this low level, national stocks were forecast to run out by May 2011. Among 122 households interviewed in February 2011, **77%** were found to have poor food consumption while **19%** were considered borderline. Though not representative of the whole country, the survey illustrates the severity of the situation. Nearly two thirds of households interviewed reported reducing portion sizes at mealtime at least once a week. About **75%** said they added more water to increase the volume of the food. The majority **(62%)** gathered an unusual amount of wild food. Access to wild food and fish is generally limited to households living in the mountains or coastal areas. Urban households are particularly reliant on relatives living in farmer cooperatives.	Health & Nutrition information was not available for this reporting period.	The food security situation has been deteriorating since 2010 and continues to be alarming in 2011. Six million vulnerable people are in urgent need of international food assistance because of a large drop in agricultural production and commercial imports, as well as a decrease in or curtailment of bilateral assistance. Recent dramatic flooding east of Pyongyang caused widespread damage to farmland and displaced populations when rivers burst their banks. The impact on the September harvest is set to be significant.	↘ ⚠

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Asia	INDONESIA	Due to its unique geography and geology, Indonesia is one of the most vulnerable countries to natural disasters such as earthquakes, tsunamis, floods, landslides, cyclones and volcanic eruptions. With a large and dense population, human-induced disasters such as bush fires, pollution, and environmental degradation also pose big threats. In July 2011, one of the most active volcanoes in Indonesia, Mount Lokon, erupted, forcing the evacuation of 5,200 people in North Sulawesi. Twenty-three earthquakes were recorded in June alone, two of which caused severe damage in several sub-districts in Northern Sumatra.	Heavy rains fell in June, causing flooding in Bali, Southeast Sulawesi, West Papua, Gorontalo, Central Maluku, and East Kalimantan. The 2011 total annual paddy production is estimated to be 67.3 million mt, a **1%** increase on the record harvest of 2010. The wet season paddy crop (March to June) accounts for **95%** of annual production. Despite the good national crop outlook, regional anomalies exist. For example, floods caused serious damage in Lampung in south-eastern Sumatra in February. Also, the Nusa Tenggara Timur (NTT) province has been affected by a prolonged drought as well as excessive rainfall in April, which damaged more than 750 hectares of maize fields in NTT's West Timor area.	Between April and June, national rice prices fell by **4%** compared with the previous quarter but increased by **18%** compared with 2010. Rice prices are currently **98%** above the five-year average. Since May 2010, the daily wage of agricultural labours has fallen in real value because of increases in basic commodity prices. Although real wages rose in February and March 2011, they remain low compared with the same period in 2010. The price of subsidized gasoline has been US$ 0.5 per litre since 2008. In the light of higher global fuel prices, the government now plans to limit subsidies for public transport, fishermen and motorcycles.	A monitoring report in NTT found relatively stable food consumption levels in March 2011 compared with October 2010. The proportion of households with poor food consumption fell from **22** to **16%** and those with borderline consumption rose from 24 to **33%**. Even so, the situation has deteriorated slightly as in February 2010, **16%** of household had poor food consumption but only **26%** were classified borderline. This could be a reflection of the prolonged drought in this zone.	Health & Nutrition information was not available for this reporting period.	The overall food security situation has improved as a result of above average rice production which has offset the impacts of rising food prices. However, there is increased food insecurity in areas where floods or droughts have devastated crops; this is particularly the case in affected areas of NTT.	→
	MYANMAR	Myanmar is prone to natural hazards. Its coastal regions are particularly exposed to cyclones and tropical storms, and rainfall-induced flooding is a recurring phenomenon across the country. Additionally, the whole country is at risk from earthquakes, droughts, and fires, while the hilly regions are also exposed to landslides. Recent events include the devastating Cyclone Nargis in May 2008 and Cyclone Giri in October 2010. The Northern Rakhine State of Myanmar is one of the most remote, poor, and densely populated areas of the country. It's acute need for humanitarian assistance is characterized by chronic malnutrition, low income, and very weak infrastructure. The region is particularly vulnerable to above mentioned natural disasters which often block physical access.	The total annual cereal harvest for 2011 is forecast at 32.4 million mt (including paddy), which is an increase of **0.6%** from last year's below average output.	Terms of trade vary across the country because of variations in rice prices. Higher rice prices are impeding food access for vulnerable populations. The price of rice rose **11%** in the second quarter compared with the first. In the second quarter, the rice purchasing power of women casual labourers improved by **11%** compared with the first quarter, largely attributed to an increase in wages.	Information on Food Consumption & Coping Strategies was not available for this reporting period.	In recent weeks, Myanmar has been hit by a major water crisis resulting from the abnormally hot weather and an increased damming of rivers. The shortage has affected major towns in Sagaing, Bago and Irrawaddy divisions, and Rangoon. Access to safe drinking water is a serious concern, particularly in the Northern Rakhin State where every third household is reportedly at high risk of consuming contaminated water. This lack of potable water is a serious health risk.	Overall, the food security situation remains stable compared with last year. Some gains have been made in cyclone and drought-affected areas; nonetheless, the Northern Rakhine State remains highly vulnerable.	→

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Asia	NEPAL	Since 1996, Nepal has made considerable progress in improving social and human development indicators such as life expectancy, mortality rates, poverty incidence, and adult literacy. Improvements have been made despite a decade-long internal conflict which is still largely unresolved, although negotiations are ongoing. The country is currently experiencing challenges around the national voter registration campaign for the next general election, scheduled for 2012. Nepal remains one of the poorest and most food-insecure countries in Asia. In recent years, the combined effects of natural disasters, high food prices, and a stagnant economy have increased food insecurity among the most vulnerable population groups, particularly in the remote districts of the Far and Mid-Western Hills and Mountains. The June to September monsoon season often triggers floods and landslides. This year, the monsoon rains caused damage in 14 districts across the country. The Terai lowlands were the worst hit by the floods, with damaged roads, obstructed transport, interrupted telephone services, broken electricity supplies, and inundated fields. An estimated 200,000 people were directly affected by this year's monsoon, both in Nepal and in neighbouring India.	The 2010/11 major summer crop production increased: paddy rose by **10.9%**, maize by **11.5%**, and millet by **1.0%**. The winter crop (mainly wheat) is also likely to be higher than last year, due to extended monsoon rains in 2010 which kept the soil moisture favourable for germination, and good rainfall between January and February 2011. Overall, a very marginal surplus in Nepal's 2010/11 cereal balance is expected against the record deficit of 330,000 mt **(6.2%)** registered last year. In spite of good national production, some areas in Nepal are likely to face food deficits, particularly in the Eastern Terai districts of Saptari and Siraha, and in the Mid- and Far-Western Hills and Mountains. This is because of the large geographic disparities in production and yields.	Despite a good harvest, wheat flour prices rose by **9%** in the second quarter compared with the first . Rice prices went up **4%** during the same period. Compared with the five-year average, the prices of rice and wheat flour rose by **73%**. However, wheat flour prices are expected to fall following a bumper winter season harvest and the lifting of India's four-year ban on grain exports. Since many flood-affected households in the Terai lowlands have lost their assets, they may see a severe drop in their purchasing power.	In the areas with a localized food deficit, households have started to consume a poor and inadequate diet. They are resorting to negative coping strategies such as reducing the size of their meals, opting for less preferred food, borrowing more and selling their assets.	Health & Nutrition information was not available for this reporting period.	Overall, the food security situation has improved mainly due to the good summer and winter harvests. However, pockets of food insecurity remain in areas where the summer crops were damaged, e.g. Eastern Terai districts of Saptari and Siraha, and in the Mid- and Far-Western Hills and Mountains.	→
	PAKISTAN	Pakistan is the largest food exporter in the region after Kazakhstan, and it therefore plays a critical role in the food security situation across the entire region. However, Pakistan's economy has faltered in the face of recent security challenges, which have been exacerbated by macro-economic instability, massive power shortages and the food and fuel price crises of 2008. Consequently, there has been a sharp decline in food security for millions of Pakistanis: unemployment has increased and wage rates have not kept pace with inflation, especially in staple food prices. Pakistan is also vulnerable to natural disasters, with a history of drought, earthquakes, floods and landslides. In recent years, recurrent flooding has caused severe damage. In late-July 2010, heavy monsoon rains – reportedly the worst since 1929 – flooded one third of Pakistan and affected 18 million people, causing significant loss of life, destroying homes and livelihoods, and displacing populations. Flash floods are forecast for the 2011 monsoon season from June to September, causing renewed concern for communities struggling to recover.	The overall weather conditions were favourable for winter wheat production. Wheat planting increased, particularly along the Indus river banks, which were covered with fertile silt deposits following the flash floods of 2010. The 2011 winter wheat harvest is expected to be **3%** higher than last year and close to the record level of 2009. Wheat is the main staple food and accounts for **37%** of the total dietary energy supply. Large stocks and good pre-flood wheat production have covered the national wheat requirements from May 2010 to April 2011 (estimated at 25 million mt).	In the second quarter of 2011, national wheat flour prices fell by **2%**, and the price of rice remained unchanged compared with the first quarter. Wheat flour prices are currently **120%** higher than the five-year average, and rice is **135%** more expensive. The government removed fuel subsidies in January, resulting in a **5.7%** increase in petrol prices between April and May 2011. Over the first quarter of 2011, casual labourers saw a decline in their purchasing power because of a **13%** cut in wage rates. In March, the amount of wheat flour that could be purchased with the daily wage fell by **11%** compared with January. The situation for wage labourers improved in the second quarter: their purchasing power rose by **26%** partly because of a higher demand for labour during the harvest season.	In the aftermath of the flood, **27%** of households had poor food consumption and **19%** had borderline consumption. Additionally, between **55** and **80%** of households lost all their food stocks.	Health & Nutrition information was not available for this reporting period.	The food security situation has remained largely stable due to the successful winter harvest, except populations who remain displaced or without shelter following 2010 floods. However, short-term gains made in the first half of 2011 may be reversed with the threat of new flooding in the coming months, ongoing conflicts and rising food prices.	↘ ⚠

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Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
Latin America and the Caribbean	BOLIVIA	Bolivia is one of the poorest countries in South America. Almost **50%** of its indigenous population live below the poverty line. The majority of indigenous people are small subsistence farmers, dependent on rain fed agriculture with poor natural resources. Recurrent natural disasters and rising food prices have exacerbated hunger and malnutrition in Bolivia. This year has not been an exception, with 20,000 households hit by flooding in the El Chaco region, 1,500 affected by a large landslide in La Paz and many others suffering from a snowstorm in the southern region of Potosi department. In May 2011, a man-made diversion of the Pilcomayo River deterred fish from moving upstream, reducing the catch, hence affecting the livelihood of 5,000 poor families dependent on fishing.	Total cereal production in 2010 (winter and summer harvests) was estimated at 2 million mt, **6%** higher than the 2009 harvest. This was mainly thanks to higher rice yields. This year, despite a notable delay in sowing caused by dry weather in the last few months of 2010, the abundant rainfall from mid-January was generally beneficial for maize crops. However, by the end of March heavy rains had fallen on 14,000 hectares of cultivated land, mainly in the La Paz Department where 5,811 hectares were damaged. Early estimates indicate a maize production of 704,000 mt, a **4%** increase on last year's output, which is attributable to higher yields. This production, plus estimated imports of 37,500 mt, will almost meet the national maize demand for 2011 (746,000 mt). Rice yield are expected to be lower because the crop suffered from dry weather during the planting season.	Overall food prices fell during the first quarter of 2011 after a big increase during the second semester of 2010. Even so, prices have not returned to their pre-crisis levels of the first semester of 2010. In the second quarter, maize prices dropped by **24%** compared with the previous quarter, but prices stayed **106%** above the five-year average. Rice prices also fell by **11%** but wheat flour rose by **6%**, reflecting higher international prices. Terms of trade for wage labourers are improving due to falling food prices and an increase in the minimum wage rate, in place since January 2011. The minimum wage now covers **97%** of the basic food basket. Due to shortages in the local market, the Bolivian government has imported sugar, maize and wheat flour for direct sale to the population as a price stabilization measure.	A combination of heavy rains, drought and the huge landslide in La Paz generated a massive loss of livelihoods and displaced hundreds of families. A recent assessment in the drought-affected region of El Chaco identified 30,000 people as food insecure, mainly because of deficient food consumption. In April, 2,780 families in the regions of northern Pando, Beni, and Riberalta were displaced by floods. According to WFP assessments, most of these families have adopted negative coping strategies such as reducing the number and quality of meals, migrating and selling assets.	The beginning of 2011 saw an outbreak of dengue. Local health authorities report that the outbreak could be worse than that of 2009 when 84,000 cases were reported in one year. Confirmed cases of dengue throughout the country already number over 24,000. The Department of Santa Cruz has the most reported cases.	Frequent extreme weather events continue to compromise the food and nutritional security of the vulnerable population, particularly of those located in the highlands and lowlands. However, in June 2011 the government approved the "Community Productive Revolution Law" in an effort to stabilize food prices and provide food assistance to emergency-affected populations. This measure has helped protect the population from a further erosion of their food security.	→
	GUATEMALA	The 36-year civil conflict ended in Guatemala in 1996. Even so, the country continues to be plagued by extreme social inequalities and widespread poverty, particularly among indigenous communities. Rates of illiteracy, infant mortality and malnutrition are among the highest in the region. The country also has the highest crime rate in the region, and is beset by organised crime and violent street gangs. In 2010, the country was hit by torrential rains, floods, landslides and a volcanic eruption, leaving 330,000 people in need of food assistance. This year, the June to November Atlantic hurricane season is expected to bring more hurricanes than is usual. Such intense weather conditions could damage crops and reduce market access. Floods have also affected 1,600 people in Baja Verapaz, who need close monitoring.	The medium-term forecast for the first rainy season (May to July) predicted average or above average rainfall. Seasonal rainfall in May maintained sufficient soil humidity conditions and provided favourable planting conditions. However, heavier rainfall is now forecast, threatening crops planted near rivers and on steep slopes at risk of landslides. August has already brought excessive rainfall: southern areas saw **20%** more rain than average, and **40%** more fell in northern zones. The maize and bean production in the so-called "Dry Corridor" is expected to improve in comparison with 2010. However, production might be hampered by higher fertiliser prices, which are **26%** more expensive than last year.	National maize prices increased by **15%** compared with the previous quarter. Prices in the second quarter of 2011 are **52%** higher than during the same period last year. The basic food basket rose by **2%** between December and April, but this has been partially offset by an increase in the minimum wage. Food prices are set to keep rising, so the difference between the cost of the food basket and the minimum wage is projected to widen rapidly during the coming months. This will likely reduce the purchasing power of the most vulnerable households.	Food consumption fell during the reporting period because of the annual lean season, which started early than usual in March and will last in most areas until August. The traditional coping strategy is seasonal migration to Mexico. In the Altiplano (western highlands), which is extremely vulnerable to food insecurity, the poorest households will find it difficult to meet their food needs, even if they resort to negative coping strategies, particularly during the third and early fourth quarter. Their food consumption will only improve with the next harvest which should start at the beginning of November (one per year only).	The 2009 drought and Tropical Storm Agatha in 2010 increased acute malnutrition among children under 5. Between January and July 2011, 7,743 acutely malnourished children under 5 were detected and registered for treatment (**63%** moderate and **37%** severe acute malnutrition). There is a high risk of nutritional deterioration in the provinces of Zacapa, Chiquimula, San Marcos and Baja Verapaz, according to the latest survey conducted by the Ministry of Health on the malnutrition rate per 10,000 inhabitants. With support from the international community, including WFP, the Ministry of Health has strengthened its surveillance system and introduced the community-based treatment of acute malnutrition. The Hospital Protocol attends severe cases with medical complications.	The deterioration in food security is attributable to the lean season but also to the persistently high food prices and the consequent reduction in purchasing power. In the coming months, unfavourable weather conditions may damage crops, which would also compromise Guatemala's food security. Close monitoring during the lean season is essential.	→

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Countries (A)		Context (B)	Rainfall & Production (C)	Prices & Purchasing Power (D)	Food Consumption & Coping Strategies (E)	Health & Nutrition (F)	Food security trend and outlook (G)	
Latin America and the Caribbean	HAITI	Haiti is still struggling to recover from the devastating earthquake of January 2010, which impacted 3.5 million people and displaced 2.1 million. The country is also highly vulnerable to hurricanes, floods and the outbreak of disease. The 2011 Atlantic hurricane season is forecast to be more turbulent than usual, which is a particular concern in Haiti in the context of the ongoing reconstruction efforts and a seasonal increase in reported cholera cases. There are still 595,000 IDPs living in displacement camps who will be very exposed to the heavy downpours. Drought hit the northern parts of the country between November 2010 and August 2011, exacerbating an already precarious food security situation.	The spring agricultural season (March to June) accounts for half the annual production of staple crops, including maize, the most important domestically produced cereal. This year, the onset of the spring season rainfall was delayed by between 1.5 and 2 months. It started in April in the southern part of the country, and in May in the northern half, and remained generally above average and well distributed. However, agro-pastoral plains in the north and northeast, part of the humid mountains in the north and north-west departments as well as some areas in the High Central Plateau did not receive enough rainfall for successful spring cultivation.	Rice imported from the US, is the main staple sold on local markets, both in urban and rural areas. Imported rice prices fell by **12%** in the second quarter of 2011 compared with the first quarter. However, prices remain **48%** higher than the five-year average. Domestically produced maize prices have been stable over the past 6 months. The purchasing power of low-income populations has increased. In April, a wage of 200 gourdes earned by an unskilled labourer could buy 4.9 kg of rice, which is a **36%** improvement on the 3.6 kg of January. Government subsidies of petroleum products have been suspended, which is pushing domestic oil prices up. As a result, transportation costs have risen by **30%**.	Food access remains difficult for poor households and IDPs. Because of the delayed spring campaign, households are still relying on markets to access food. The delay has resulted in additional household expenditures. Households are largely coping by selling small animals and producing charcoal for sale. In anticipation of upcoming school expenditures (school starts in early October), many poorer households are reducing the size and number of meals eaten and their dietary diversity. Households in the drought-stricken north face a much harder situation. While those living in the traditionally wetter humid mountains have a diversity of root and tree crops and income sources (remittances, migration, fishing), those living in the agro-pastoral plain have much more limited options.	The rainy season is set to peak between August and October. Rural areas are likely to see an increased risk of cholera because of the ensuing poor sanitation. Nonetheless, the numbers of new cholera cases and mortality rates have been decreasing over the past months in most departments, in spite of the heavy rains in June.	Food security in most parts of the country should improve with the upcoming spring season harvest. Between January and June, remittances were **6.3%** higher than in 2010. However, in specific areas in the northern half of the country, the food security situation is expected to worsen dramatically over the coming months because of the extended drought conditions that have caused large crop production shortfalls. Recurrent environmental disasters in the past two years are still damaging food security in Haiti, especially for the poorest households in a number of municipalities across the country. Close monitoring will be required throughout the imminent hurricane season.	→
	HONDURAS	Honduras is extremely susceptible to hurricanes, floods, landslides and droughts. In 1998, Hurricane Mitch caused an unprecedented catastrophe, devastating lives, livelihoods, infrastructure and production systems. About 5,600 people were killed and **60%** of the highway network was affected, isolating cities and productive zones. Those left homeless numbered 285,000, many of whom were unemployed and without a source of income. Production and exports, economic growth, employment and revenue all felt the blow, and damages amounted to US$ 2 billion. Honduras may be affected by this year's active hurricane season, which will last from June to November.	Unusual weather patterns in 2010 hampered the production and productivity of basic grains. Losses in the second harvest season were **38%** for maize, **24%** for sorghum and **40%** for beans. The maize deficit reached 200,000 mt, which represents **17%** of total consumption requirements. The past four years have seen a **30%** reduction in maize yields caused by a fungal disease, with crops in the west and the highland of Comayagua worst affected. Between December 2010 and March 2011, there was an influx of cold fronts and irregular rainfall. Improved rainfall in the second quarter created favourable crop conditions, and a better harvest is forecast for 2011. Even so, the 2011 heat wave lasted longer than usual and could reduce crop yields in the first agricultural cycle.	The price of maize, the main staple, rose by **16%** in the second quarter compared with the first because of the start of the lean season. Maize prices went up more than **30%** between January and June 2011. Prices are **73%** higher than last year as a result of the crop deficit in the 2010/11 marketing year. The price of beans has shown an upward trend since last year. Between February and July 2011, a **23%** increase was recorded. Maintaining unprecedented levels, beans are now **130%** more expensive than in June 2010. The start of the harvest period has pushed up demand for unskilled on-farm labour, providing additional income that could improve poor households' purchasing power at a time when their own food reserves are depleted.	Households have run out of food stocks earlier than usual. The proportion of households with poor access to food, rose to **29%** in March 2011 from **19%** in October 2010. The limited access was also reflected in a decline in food consumption. Over the same period, the proportion of households with poor or borderline food consumption increased from **14** to **22%**. In March 2010, only **17%** of households had an inadequate consumption. Particularly in southern Honduras, households have adopted negative coping mechanisms such as changing their diet, selling assets, and migrating temporarily or even permanently.	Health & Nutrition information was not available for this reporting period.	Food insecurity increased during the first semester of 2011 as a result of the poor 2010 maize and bean harvest. This has made many rural households dependent on market purchases during the annual lean season. Some areas in the highlands of La Paz (7 municipalities) have declared an emergency because of food losses and high prices. The situation in this area is of particular concern because food reserves are already depleted and the next crop harvest is not expected until the end of November. However, a better harvest is forecast for this year, so overall food security could stabilize.	→

See Legend of table on page 2

Selected set of food security monitoring indicators and their application

i. **Context (column B)** describes the political and socio-economic context and highlights recent shocks and risk factors.

ii. **Rainfall and production (column C)** provides an overview of the rainfall situation in the context of the agricultural seasons and indicated (expected) levels of production at national or sub-national level.

iii. **Prices and purchasing power (column D)** gives an overview of retail food price of the second quarter 2011 compared to the first quarter 2011 and to the five year average. Terms of trade are used as a proxy for purchasing power.

iv. **Food consumption and coping strategies (column E)** Food consumption denotes the quality and quantity of food consumed by a household. The Food Consumption Score (FCS) is a composite score that is a good proxy of food consumption and dietary diversity. Coping strategies are adopted by households under stress to mitigate food consumption shortfalls. The Coping Strategies Index (CSI) is used as a composite index measuring the severity and frequency of strategies that households are applying.[1]

v. **Health and Nutrition (column F)** highlights if there is a (potential) deterioration of the health situation, which could impact on nutrition. Nutrition is the outcome of the individual food intake and health status of a person. Indicators reported include wasting and MUAC which reflects acute malnutrition. Stunting reflects chronic malnutrition.

1. *For further guidance on FCS or CSI, please refer to the CFSVA handbook: http://www.wfp.org/food-security/reports/CFSVA. Caution should be applied when drawing conclusions of a more generalized nature as data is often collected from a limited number of sentinel sites (please refer to the original source for further information on coverage/methods).*

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Abbreviations and Acronyms

AfDB	African Development Bank
AIDS	Acquired Immune Deficiency Syndrome
CAP	Consolidated Appeals Process
CFSAM	Crop and Food Security Assessment Mission
CFSVA	Comprehensive Food Security and Vulnerability Analysis
CHS	Community and Household Surveillance System
CILSS	Permanent Inter-State Committee for Drought Control in the Sahel
CIS	Commonwealth of Independent States
CPI	Consumer price index
CSI	Coping strategy index
DHS	Demographic and Health Survey
DPRK	Democratic People's Republic of Korea
DRC	Democratic Republic of the Congo
EFSA	Emergency Food Security Assessment
FISP	Farm Input Subsidy Programme (Malawi)
FSIP	Farmer input support programme (Zambia)
FAO	Food and Agriculture Organization of the United Nations
FCS	Food consumption score
FEWS-NET	Famine Early-Warning Systems Network
FSNAU	Food Security and Nutrition Analysis Unit
GAM	Global acute malnutrition
GDP	Gross domestic product
GIEWS	Global Information and Early-Warning System
GOSS	Government of Southern Sudan
HIV	Human immunodeficiency virus
IDP	Internally displaced person
IMF	International Monetary Fund
IPC	Integrated Food Security Phase Classification
IRIN	Integrated Regional Information Networks
Kcl	Kilocalorie
MAM	Moderate acute malnutrition
MENA	Middle East and North Africa
MICS	Multiple Indicator Cluster Surveys
MT	Metric tonnes
MUAC	Mid-upper arm circumference
NIS	National Statistical Institute
NTT	Nusa Tenaggara Timur
OCHA	Office for the Coordination of Humanitarian Affairs.
PDS	Public Distribution System-DPRK
RPCA	Food Crisis Prevention Network
SAM	Severe acute malnutrition
SIFSIA	Sudan Institutional Capacity Programme: Food Security Information for Action
SNNPR	Southern Nations Nationalities and People's Region
TOT	Terms of trade
UNAIDS	Joint United Nations Programme on HIV/AIDS
UNICEF	United Nations Children's Fund
UNHCR	United Nations High Commissioner for Refugees
VAC	Vulnerability Assessment Committee
VAM	Vulnerability Assessment and Mapping
VAT	Value added tax
WFP	World Food Programme



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