WFP World Food Programme wfp.org

Issue 8 | October 2012

Global Food Security Update

TRACKING FOOD SECURITY TRENDS IN VULNERABLE COUNTRIES

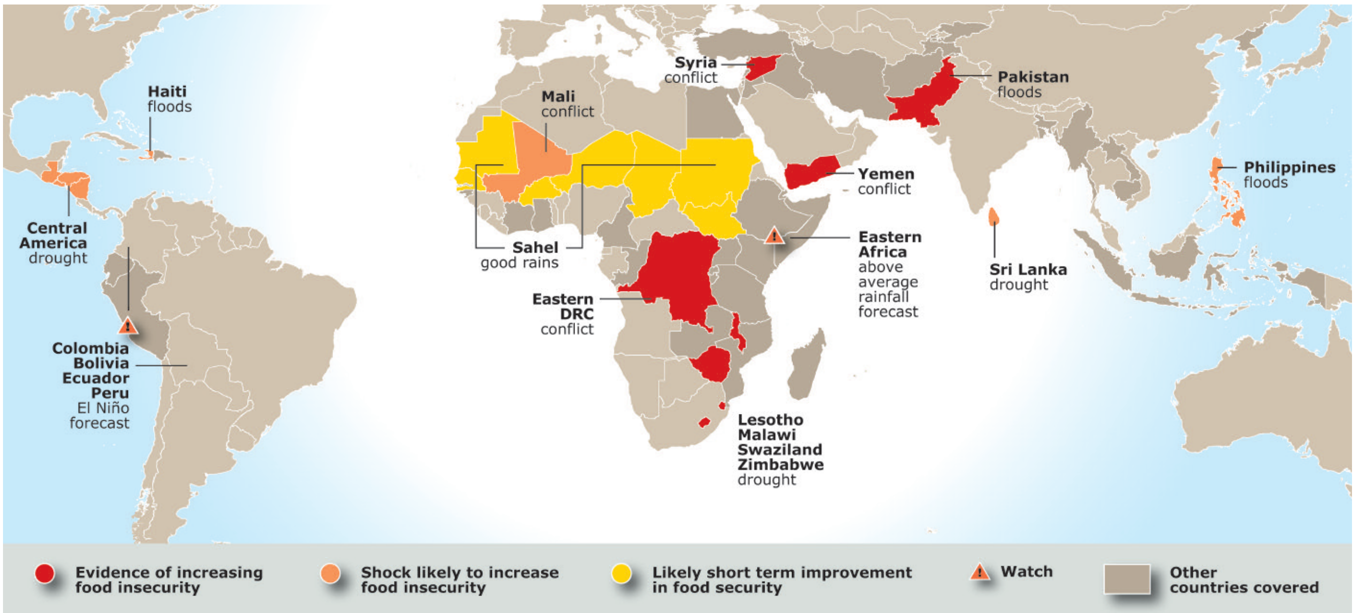
Fighting Hunger Worldwide

In focus

- Some 3 million people require food and livelihoods assistance in **Syria**. A surge in displacement took place between June and September;
- In September, flooding in **Pakistan** affected 4.5 million people; seven flood affected districts are in IPC phase 3 (crisis) or phase 4 (emergency);
- In the **Democratic Republic of Congo**, 5.4 million people require humanitarian assistance. Since June 2012, conflict has displaced 550,000 people in the East;
- According to the August IPC round, **46 percent of the Yemeni population** - more than 10.5 million people - are food insecure; 24 percent are in phase 4 (emergency) and 22 percent in phase 3 (crisis), due to conflict impacts;
- Food insecurity levels have increased in **Lesotho, Malawi, Swaziland** and **Zimbabwe** following poor crop performance in 2011-2012. Humanitarian needs are peaking as the lean season approaches; seasonal forecasts from a number of sources all indicate below average rainfall through the next growing season;
- Following a lean season where acute malnutrition rates exceeded the 'critical' 15 percent threshold in parts of Chad, Niger, Mauritania and Senegal, seasonal rains have led to short-term improvement in food security conditions across the **Sahel**. Flooding in August and September affected some 1.5 million people in **West Africa**;
- Drought has affected the *primera* harvest **El Salvador, Guatemala**, and **Honduras**, causing maize price increases. Poor weather and Hurricane Isaac have disrupted rural livelihoods in **Haiti**;
- Although **global food price increases** have generally not passed through to domestic retail markets, increases are being observed in wholesale prices in some import-dependent countries; and
- The developing **El Nino** might lead to increased precipitation in the greater horn of Africa and in the Philippines, and to below average rains in Central America and parts of Southern Africa.

Key events impacting food security

JUNE - SEPTEMBER 2012



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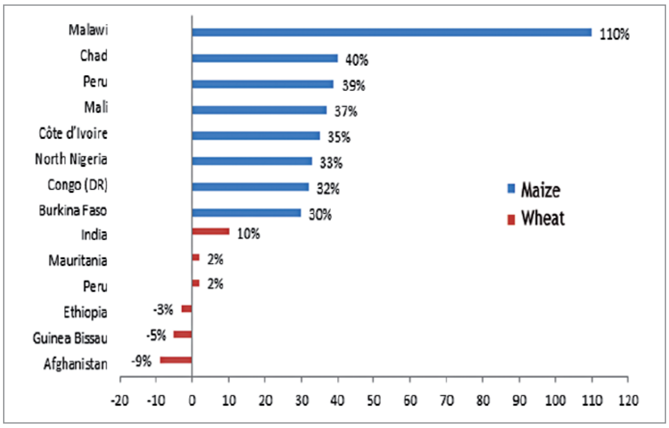
Increasing international prices and vulnerability

Market monitoring during the 3rd quarter of 2012 has shown that international price increases have yet to pass through to retail markets. The substantial increases in maize prices noted in **Malawi** and **West Africa** compared to the same quarter in 2011 reflect local factors, rather than the international increase in maize following the recent drought in the US. In markets where data is available, retail wheat prices have remained stable compared to 2011, also showing that international trends have yet to affect domestic wheat markets.

However increases in wholesale prices of imported maize or wheat are noted in **Haiti, Yemen, Bangladesh** and **Kyrgyzstan**. Maize prices have been increasing in Central America, as a result of insufficient rainfall for the primera harvest and speculation related to the increase of maize on US markets. The continuing stability of rice prices in Asia is expected to limit negative impacts in that region. Although global price increases have yet to cause a measurable increase in vulnerability, the phenomenon could exacerbate food stress in import dependent countries in coming months.



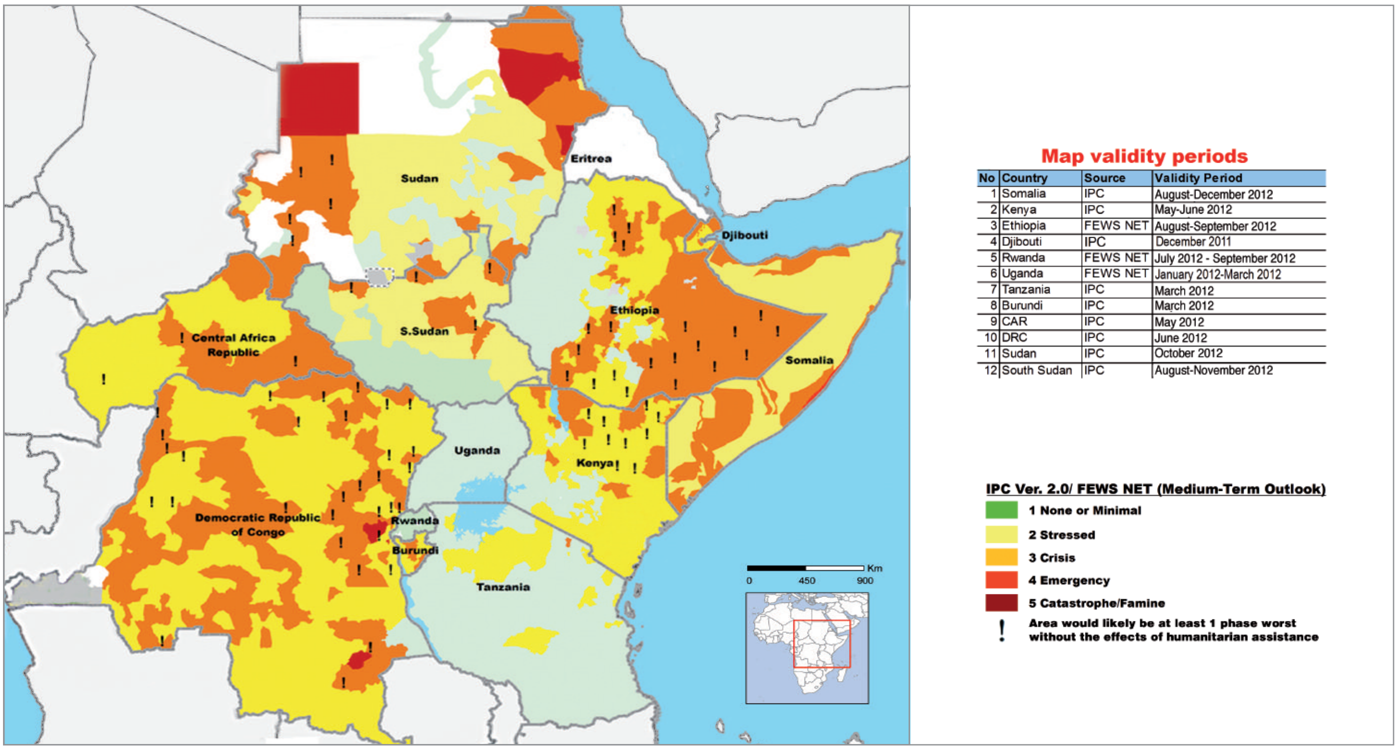
Source: WFP Market Monitor Database.

Regional highlights

EASTERN AND CENTRAL AFRICA

- Over 5.4 million people in **Democratic Republic of Congo** are in need of humanitarian assistance; 46 percent of them live in the eastern conflict-affected provinces;
- In **South Sudan**, 50 percent of the rural population is food insecure, according to the June 2012 FSMS. The disruption of trade with Sudan, and high food and fuel prices, are the main drivers of food insecurity;

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



No	Country	Source	Validity Period
1	Somalia	IPC	August-December 2012
2	Kenya	IPC	May-June 2012
3	Ethiopia	FEWS NET	August-September 2012
4	Djibouti	IPC	December 2011
5	Rwanda	FEWS NET	July 2012 - September 2012
6	Uganda	FEWS NET	January 2012-March 2012
7	Tanzania	IPC	March 2012
8	Burundi	IPC	March 2012
9	CAR	IPC	May 2012
10	DRC	IPC	June 2012
11	Sudan	IPC	October 2012
12	South Sudan	IPC	August-November 2012

Source: Regional FSNWG, IPC country teams and FEWS NET.
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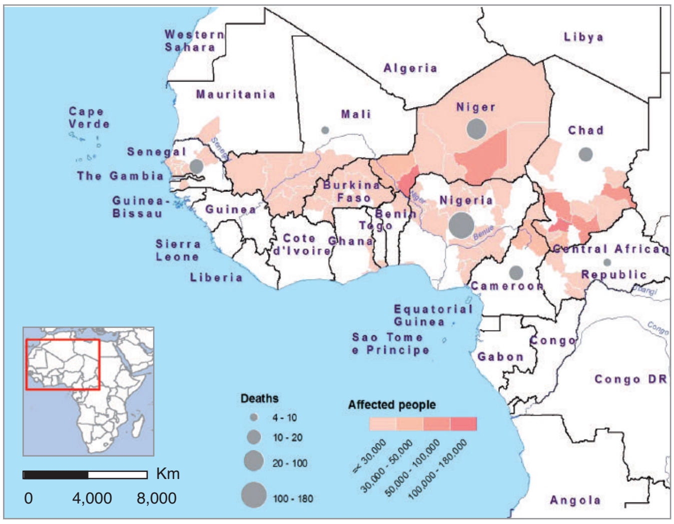
- Low access to markets, low agricultural productivity and high food prices have been causing food insecurity, affecting over 1.5 million people in **Burundi**;
- In **Ethiopia**, some 3.76 million people are considered to be food insecure following poor rains. Crisis levels of food insecurity (IPC phases 3) persist in the south and southeast regions (Somali, Oromia and SNNPR) and in the north (Amhara and Afar);
- In **Somalia**, although food security and nutrition indicators have improved significantly since beginning of 2012, a total of 2.1 million people are in acute food security crisis (IPC Phases 3 and 4) in southern and central agro-pastoralist areas for the August to December 2012 period;
- In the Greater Horn, average to above average rainfall is expected across the region in the next 3 months as a result of the **mild to moderate El Niño event**;
- Over the next three months, food security is expected to register a general improvement as a result of the coming harvests and of the decline of staple food prices in both wholesale and retail markets throughout the region.

WESTERN AFRICA

- SMART surveys carried out in June and July show that **GAM rates exceeded the 15 percent 'critical' threshold** in areas of Chad, Niger, Mauritania and Senegal;
- **Generally good rainfall** has led to improved food security conditions in the Sahel, and crop prospects for 2012-2013 seem promising in areas that have not experienced flooding. Nonetheless, flooding has affected some 1.5m people throughout the region as of mid-September. Joint food and crop assessments are under way; more information on regional food and crop prospects for 2012-2013 will become available in November;
- Displacement continues in northern **Mali**. In spite of good rainfall, ongoing responses and the resumption of some trade, the current food and nutrition situation remains difficult in the northern regions of Kidal, Gao and Tombouctou;
- The desert locust threat should continue to be monitored in Chad, Niger, Mali and Mauritania, a potential threat to crops in 2013 exists should locust numbers multiply.

Areas affected by flooding as of 9 October 2012



Source: OCHA.
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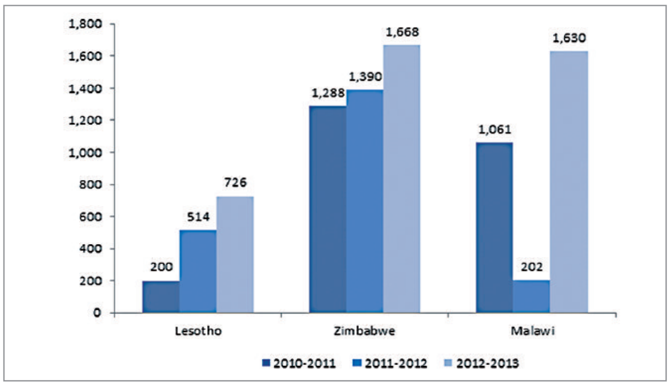
SOUTHERN AFRICA

- Recent surveys conducted by Vulnerability Assessment Commitees (VACs) show significant increases in food insecurity in **Lesotho, Malawi, Swaziland** and Zimbabwe following below average crop production. Since 2011, the estimate of vulnerable people has risen from 0.5 to 0.7 million in Lesotho, from 0.2 to 1.6 million in Malawi, and 1.4 to 1.7 million in Zimbabwe;
- In Malawi, the September IPC report highlights nine districts in the southern region of the country as "stressed" (phase 2). Approximately 39 percent of the population in these districts (1.6 million people) is expected to have food gaps averaging 3-8 months during the 2012/2013 consumption year. The same nine southern districts are projected to be IPC Phase 3 (Crisis);
- Food security conditions remained stable in **Zambia**, although some districts experienced erratic rainfall and floods;
- Although most of the Southern Africa region is forecast to receive normal to above normal rainfall during the October to March season, below average precipitation is forecast for Lesotho, Southern Zimbabwe and southern Mozambique, areas that suffered from a poor growing season in 2011/2012.

Estimated number of food insecure people according to national VACs ('000)

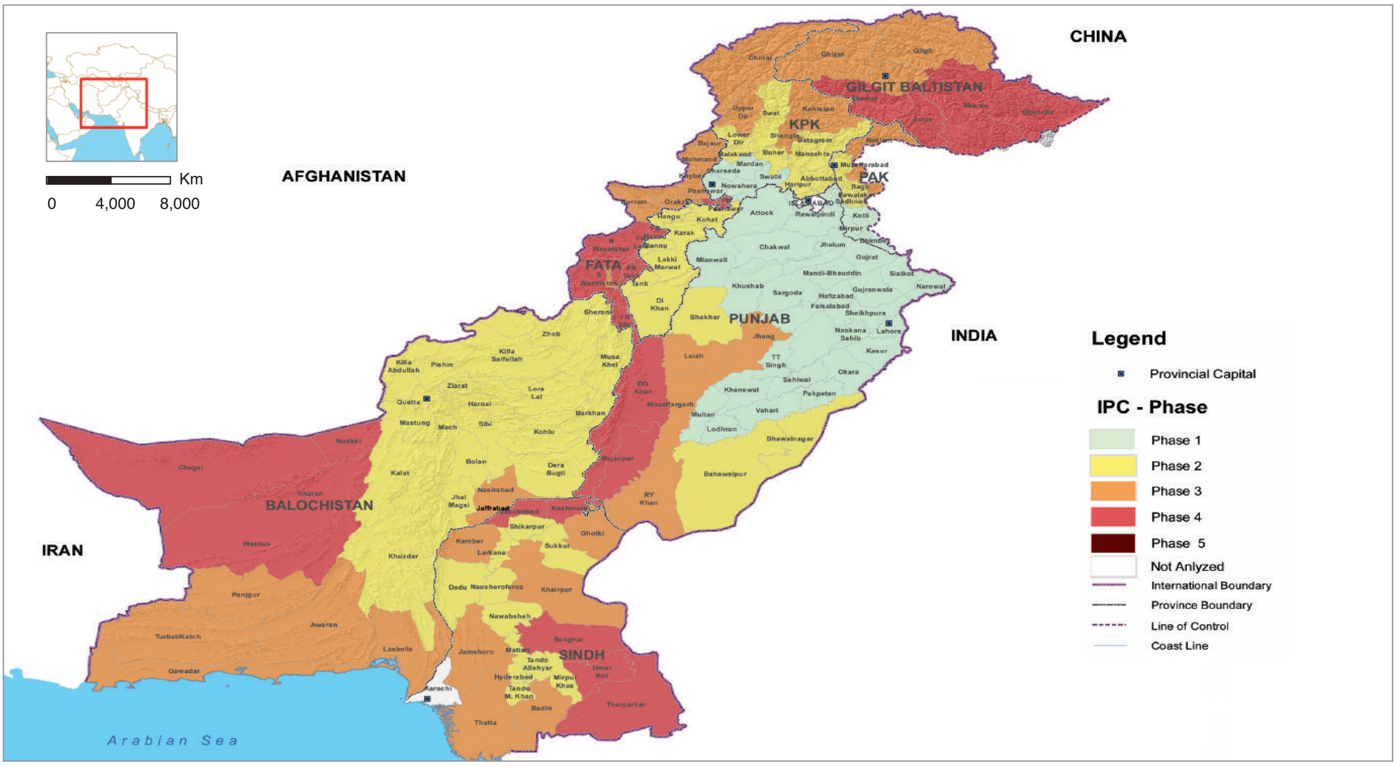


Source: VAC Assessments, July 2012.

ASIA

- Flooding in September has affected 4.5 million people in **Pakistan**, where 7 districts are classified as facing IPC phases 3 (crisis) and 4 (emergency);
- Monsoon rains and tropical storms displaced over a million people in the northern **Philippines** in August;
- Drought in **Sri Lanka** has affected 1.3 million people;
- **Rising food inflation in Asia will start hurting the poorest** if current high global food prices are sustained over the next months. Fortunately, Asians predominantly consume rice as their staple. Unlike wheat, maize and soybeans, the price of rice on world markets has remained fairly stable due to favorable crop conditions. However, if global grains prices remain high in the following months and wheat production in Australia decreases, as predicted, Asian markets are likely to be affected. Much therefore will depend on the extent to which rice policies in India and Thailand mitigate potential negative impacts.

Pilot IPC Acute Food Security Analysis for Pakistan (September 2012)



Source: IPC Pakistan Technical Working Group.
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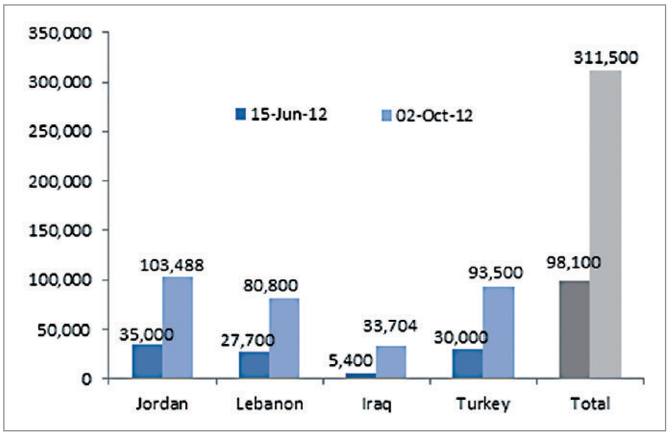
MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

- In **Syria**, 3 million people are food insecure according to a recent FAO/WFP/Ministry of Agriculture report (June 2012). Out of these, 1.5 million Syrians are in need of urgent and immediate food assistance. UNHCR figures show that the number of Syrian refugees has increased from 98,100 in June to 311,500 in October. Most Syrian refugees are in Turkey, Lebanon, Jordan and Iraq;
- According to the August 2012 IPC round, 46 percent of the **Yemeni** population or more than 10.5 million people are food insecure; 24 percent (5.5 million people) are in IPC phase 4 (emergency) and 22 percent (more than 5 million people) in phase 3 (crisis), due to the consequences of conflict. International food price increases could have serious impacts on food-import dependent Yemen;

Number of Syrian refugees in neighbouring countries (June-September 2012)



Sources: UNHCR, October 2012; UNHCR, Revised Regional Response Plan, June 2012.

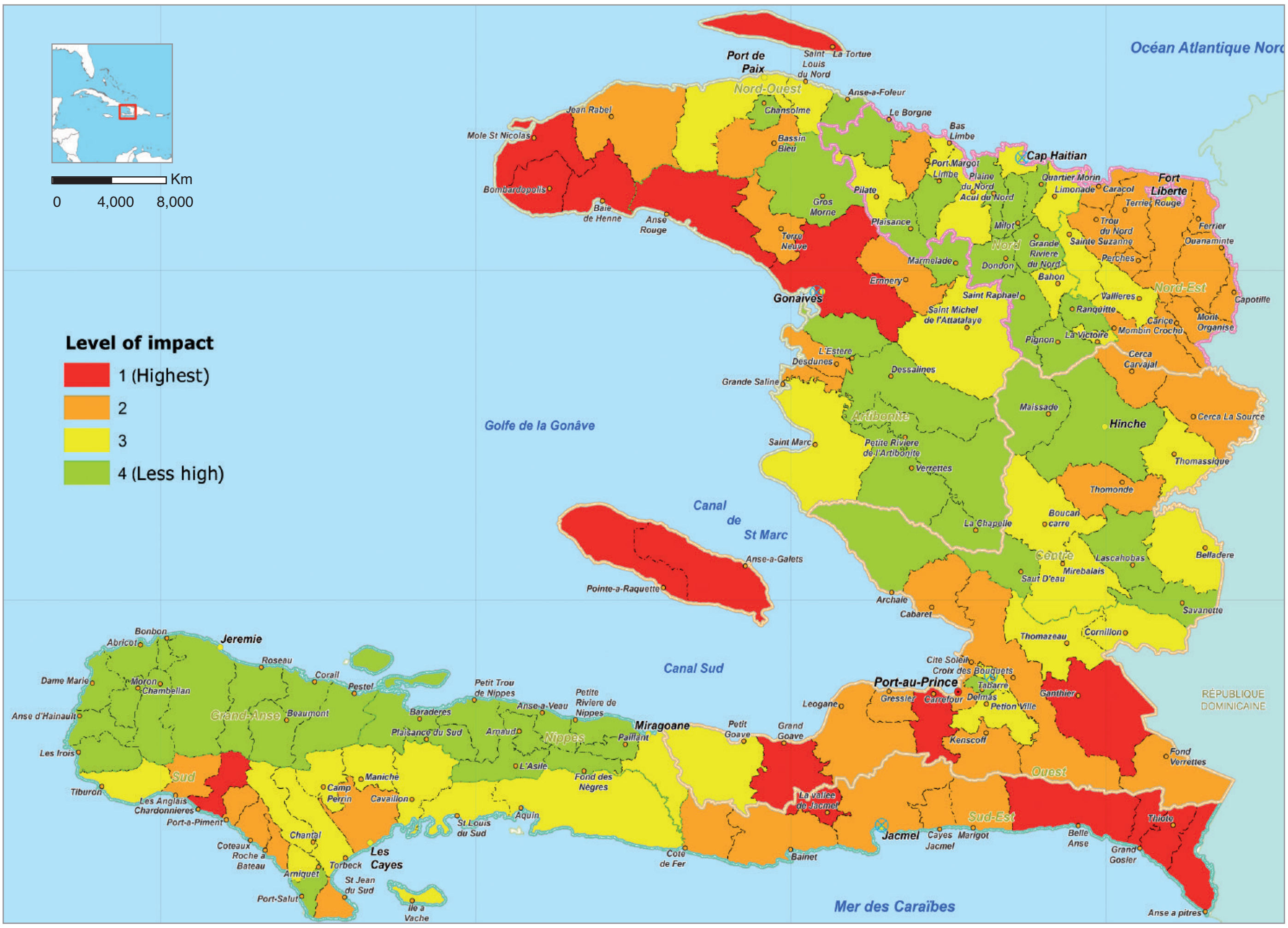
- In early October the Iranian Rial depreciated significantly against the US dollar. The plunging value of the currency made food purchases and food access much more difficult for low income households. A recent Joint Assessment Mission conducted in **Iran** by WFP and UNHCR in July 2012 concluded that around 20 to 25 percent of refugee households living in settlements are extremely vulnerable to food insecurity;
- Wheat prices are increasing in **Kyrgyzstan**, due to higher export prices in Kazakhstan. Potential pass through of higher international wheat prices should be monitored in the region.

LATIN AMERICA AND CARIBBEAN

- Drought has affected the *primera* harvest in the dry corridors of Eastern **El Salvador, Guatemala, Honduras** and **Nicaragua**, impacting household food security in several vulnerable areas in these countries;
- Losses in grain production due to poor rain, damages caused by Tropical storm Isaac and increasing staple food prices are constraining food access in **Haiti**;
- Although increasing international food prices have yet to affect the region, an impact on national prices is expected in the coming months. Some Central American countries facing **food production losses** may suffer from the compound effect of higher local and international maize prices;
- Weather forecasts predict further dryness in Central America with possible impacts on crop production. Weather forecasts predict further dryness in Central America with possible impacts on crop production. For South America, the seasonal forecast for October-November-December 2012 calls for an **increased probability of below normal rainfall** in Venezuela, the Guyanas, northern Brazil and parts of Bolivia.

  Forecasts indicate an **increased probability of above normal rainfall** in southeastern Brazil, Uruguay, northeastern Argentina (Buenos Aires) as well as in the highlands of Ecuador, Peru and western Bolivia.

Impact of the tropical storm Isaac on Haiti (2012)



Source: WFP, CNIGS, CNSA, VAM.
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Country Summaries

Evidence of increasing food insecurity | Shock likely to increase food insecurity | Likely short term improvement in food security | Watch

EASTERN AND CENTRAL AFRICA

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

DEMOCRATIC REPUBLIC OF CONGO: The June 2012 IPC round estimated that 17.3 million people in the DRC are facing IPC phase 3 (crisis) and 4 (emergency) conditions. Of these, about 5.4 million people are in need of humanitarian assistance; 46 percent of which are located in the eastern provinces (Orientale, North Kivu, South Kivu, Katanga and Maniema). The proportion of households with poor and borderline food consumption score in these provinces exceeds 20 percent, with peaks among IDPs living in camps in the conflict affected areas (75 percent).The causes of food insecurity include conflict-driven population movements in the eastern provinces, associated with low access to basic social services, low agricultural productivity and chronic poverty. Since June 2012, the Office for the Coordination of Humanitarian Assistance estimates that 550,000 people have been displaced in Oriental, North Kivu, South Kivu, Maniema and Katanga Provinces increasing the total number of IDPs since 2009 to 2.36 million. Physical isolation resulting from poor transport infrastructure is contributing to food insecurity and to high rates of malnutrition and child mortality in areas in Bandundu, the Kasais, Maniema and Orientale. Compared to the three-year average, price increases are noted for maize flour (+46 percent) and palm oil (+76 percent); the price of imported rice in 2011 and 2012 in the main urban markets is also well above the three years threshold. In August 2012, the price of cassava flour in Goma was 115 percent above average. Food security trends in the last quarter of 2012 would hinge on security conditions in the eastern provinces.

SOUTH SUDAN: The June 2012 FSMS round shows that half of households are food insecure and 14 percent severely food insecure. That represents a 2 percent increase from February 2012 and a 6.5 percent increase from June 2011. Acute malnutrition has reached its highest level since June 2010, affecting 20 percent of children aged 6 to 59 months. Food access has been the main driver of household food insecurity. High food prices remain the most reported shock; nearly half of household spend a high share of their total expenditure on food, compromising expenses on other basic services. The sale of natural resources constitutes the main source of income for 20 percent of households, underscoring the fragility of livelihoods in South Sudan. The closure of the border with Sudan disrupted food trade flows. The phenomenon, combined with increasing food demand in areas with high returnee numbers, has resulted in an exceptional increase of staple food prices over the last five months. Cereal prices reached record levels in June/July 2012 in urban markets. Compared to July 2011, the retail price of sorghum and maize had increased by 180 to 220 percent in Juba markets as of July 2012. Food inflation should abate thanks to the harvest that has started in September. Food and non-food price prospects will hinge on the resumption of trade between Sudan and South Sudan.

ETHIOPIA: Currently, the total number of acutely food insecure people stands at 3.7 million, of which nearly 68 percent live in two regions (Somali and Oromia). As the main Meher harvests begin to enter markets from October onwards, the number of food insecure is expected to decline by about one million through December 2012. The overall performance of the June to September Kiremt (main) rains has been favourable and the early outlook for Meher production is positive. Nonetheless, the 2012 annual production of long-cycle crops (maize, sorghum, millet) is expected to be below average in several areas. The late arrival and irregular performance of the March-May Belg (agricultural) and Gu/Sugum (pastoral) rains has stressed livelihoods in affected areas. Increasing food prices are also undermining food access for the poorest households. Compared to July 2011, the wholesale price increases observed have ranged from 5 to 45 percent for maize, up to 20 percent for wheat and nearly 50 percent for sorghum. The food prices are above the long term average by 42 percent for maize, 39 percent for wheat and 60 percent for sorghum. Over the next three months, a decline in retail commodity prices is expected with the Meher harvest. The El Nino event is expected to be conducive to higher precipitations in the last quarter of 2012 in Meher cropping areas and in pastoral areas, possibly bringing significant improvements in pasture and water availability. However the El Nino event could also cause crop damages (lower yields and quality of grains) in some Meher growing areas.

KENYA: Results from the Long Rains Assessment in August 2012 indicate that food security situation in most parts of the arid and semi-arid areas have remained at the stressed phase while most parts of the pastoral areas that were at the crisis phase (IPC phase 3) earlier in the year have moved to the stressed phase (phase 2). The number of food insecure populations has marginally declined from 2.2 million in February 2012 to 2.1 million in August 2012, however the severity of food insecurity has eased. Improvements in livestock productivities have been observed in the north-western pastoral and agro-pastoral areas that received normal to above normal rainfall. Households' food consumption has remained stable due to improved milk availability, favourable terms of trade and ongoing interventions. However, depletion of grazing resources, increased trekking distances and livestock migrations are occurring in the northeast pastoral areas that received below normal rains. In the southeast marginal agricultural zones and the coastal lowlands, crop production has been adversely affected by depressed rainfall culminating into their third failed season. Less than 50 percent of normal harvests were achieved and households have depleted their food stocks and are currently relying on market purchases. The situation will remain stable until the onset of the October to December short rains. Should the forecast of normal to above normal rains hold, the situation is expected to improve in most livelihoods. However, localized flooding may occur in some areas due to heavy rains consistent with the wetter than average conditions related to the El Niño event of late 2012. Food prices are expected to continue to decrease slightly as the harvest peaks in high producing areas in November.

SOMALIA: According to the latest report released in August by the Food Security and Nutrition Analysis Unit of FAO, a total of 2.1 million people are facing an acute food security crisis (IPC phases 3 and 4) in Somalia for the August to December 2012 period, a 16 percent reduction from the beginning of the year. While conditions have improved considerably since the 2011 due to low cereal prices and improved terms of trade, agro-pastoralist areas in central and southern areas remain in IPC 3 (crisis) phase. Furthermore, another 1.8 million people are also estimated to be acutely food insecure and in a phase 2 (stress) situation where they are barely able to meet their minimum food requirements. Without livelihoods assistance and adequate rains in the coming months, this portion of the population could revert to phase 3 (crisis).The nutrition situation shows continued improvements from the past two seasons with a median GAM prevalence of 16 percent as opposed to 22 percent six month ago. The number of acutely malnourished children under 5 years is now estimated to be 236,000 down from 323,000. However, the south of the country remains in a state of acute nutrition emergency with GAM prevalence estimated at above 20 percent in most areas, with the notable exception of Mogadishu. The central and northeast parts of the country have displayed sustained improvements and are classified as serious. A seasonal peak in GAM has been observed across pastoral livelihoods of northwest Somalia linked to failed Gu rains and high morbidity. It is anticipated that the nutrition situation in these areas will improve in the coming months.

BURUNDI: According to the last CFSAM and IPC analyses, around 1.5 million people are estimated to be food insecure, mostly in the eastern and central areas of the country that are experiencing IPC phase 3 conditions. The main drivers of current food insecurity are low access to land and a decrease of agricultural productivity related to poor weather (especially in the east), low access to agricultural inputs, and plant diseases such as the banana bacterial wilt and cassava brown streak. High food prices are curtailing households' purchase power, whereas the continuous depreciation of the local currency is driving up the prices of food imports. In particular, prices of the main staple food have risen by 33 percent (beans); +88 percent (rice); +71 percent (maize) and 53 percent (wheat) from June 2010 through June 2012. The food security situation is expected to further deteriorate, especially for vulnerable households dependent on casual labour. Meanwhile food prices continue to rise; the suspension of duty on food imports is to end in December 2012. The peak in terms of need of food assistance is expected to be during the current lean season (September-December 2012).

DJIBOUTI: According to the WFP EFSA conducted in May, some 67,000 Djiboutian are food insecure. The number of severely food insecure Djiboutians has increased from 36,200 in 2011 to 42,600 in 2012. 36 percent of households rely on unsustainable income sources and 20 percent exclusively rely on aid (+11 percent compared to 2011). Although rainfall fluctuations and drought are intrinsic features of the country's semi-arid climate, this year current and projected rainfall is far below the normal average (-30 percent). The lower animal production resulting from fodder shortages, limited grazing areas and low access to water will particularly affect pastoralists and rural dwellers. High food prices are also exacerbating chronic poverty. Staple food prices increased 0.7 percent in June and 2.9 percent in July as a result of the lean season in the main importing countries, notably Ethiopia, and high transport costs. On average, currently 73.6 percent of the households' daily global expenditure is devoted to food purchases. Furthermore, the continued influx of refugees from Somalia is leading to an increase of humanitarian needs in both rural and urban areas. Some 200 refugees are arriving in Djibouti every month and add to the existing caseload. In total, Djibouti is currently hosting some 20,000 refugees from Somalia, Ethiopia and Eritrea.

REPUBLIC OF CONGO: According to the 2009-2010 CFSVA, 7.8 percent of household in Congo are food insecure. In 2012, drought in the main cropping areas led to a much below average harvest; furthermore, the hike in food prices resulted in reduced purchasing power of vulnerable households and limited the access to basic food items in the market. There are quite a number of foreign agricultural firms in Congo; however their production levels in the first half of 2012 has been below average due to the effects of drought. The significant decrease in agricultural production registered this year follows the three last year declining trend (-45.7 percent for cassava; -61.2 percent for corn; -49.7 percent for peanuts compared to 2010). The reduction in the number of meals per day has been the most frequent coping mechanism adopted by vulnerable households. With the possible delay in the start of the current rainy season, production prospects remain uncertain.

RWANDA: According to the CFSVA and Nutrition survey conducted in March and April 2012 just before season B harvest, 460,000 households (21 percent) had unacceptable food consumption and may be considered food insecure (4 percent poor and 17 percent borderline food consumption). Since then, overall agricultural production for season B 2012 is estimated to have increased by 5 percent compared to season B 2011. An increase in planted areas has compensated lower yields of beans and maize caused by irregular rainfall during the planting and the growing season. In addition this season is reported to have been good for bananas and tubers. In August 2012, real prices of maize, sweet potatoes and Irish potatoes were 13 percent, 45 percent and 21 percent above than the 5 year average while prices for beans and cassava were the same if not below average (3 and -12 percent respectively). As we move into the lean season, many households will run out of food stocks from the previous harvest, and staple food prices are expected to rise until the next harvest in November-December. Food insecurity rates are expected to rise during this period.

TANZANIA: June-September is the main harvesting and marketing period in many parts of the country. Following a normal 2011/12 agricultural season, the food security situation in most parts of the country is considered satisfactory. However, preliminary forecasts from the ongoing governmental led food security and nutrition assessment have identified a total of 40 districts in the central, north western and north eastern Tanzania have identified some localized areas with possible food shortages during the November–January lean season. These include part of Dodoma, Singida, Manyara, Arusha and Mwanza regions. Other regions with pocket of food insecurity are Kilimanjaro, Kagera, Tabora, Tanga, Shinyanga, Lindi, Iringa, Mara and Morogoro. The government has removed the food export ban imposed last year and has continued restocking the national food reserves by purchasing from the small holder farmers. Staple food prices have been gradually decreasing (-6 percent since January 2012) as supplies continue reaching markets. However, price levels have remained above the 5 year average, making food access more difficult for low-income, market-dependant households in urban and peri-urban areas. As the 2012/2013 agricultural season commences, potential impacts of the El Nino phenomenon are a concern. The national meteorological agency has issued weather forecasts predicting above normal rainfall in most sectors of the country for September–December. This is consistent with forecasts issued by a number of regional and international institutions. In spite of government efforts to regulate fuel prices, high inflation and increasing fuel prices could further elevate transportation costs and thus impact consumer prices.

UGANDA: Both bimodal and unimodal parts of Uganda reaped normal to above normal harvests as a result of favorable rainfall conditions. Consequently, food prices are declining. As a result, the overall food security outlook for Uganda is positive through the end of the year. However, even in years of good rainfall, poor and vulnerable households in the drought-prone, impoverished Karamoja region of northeastern Uganda struggle to feed themselves beyond the immediate post-harvest season (October-February) and rely on food purchases from the market and WFP food assistance to make it through to next year's harvest. Levels of acute child malnutrition in Karamoja are also among the highest in the country, often exceeding above 10 percent Global Acute Malnutrition (GAM) levels during the peak hunger season in April/May.

WESTERN AFRICA

FOCUS: Burkina Faso, Cameroon, Chad, Côte d'Ivoire, Ghana, Mali, Mauritania, Niger, Senegal, The Gambia

MALI: Displacement and economic disruption continue to drive food insecurity in the North, which has been under the control of armed groups since April. The disruption of trade has led to cash shortages and an increase in bartering. The North relies on imports to compensate for low levels of staple food production. Whereas the northern regions of Gao and Kidal continue to receive wheat products from nearby Algeria, markets in Tombouctou are poorly supplied. Considerable levels of assistance and the seasonal resumption of milk production have probably stabilized the food security situation in the north. An EFSA focusing on internally displaced households and host households has taken place, with results expected in October 2012. Coarse grain prices have been exceptionally high over the past year in Mali, in September year-on-year price increases were 63 percent for millet, 43 percent for sorghum, and 44 percent for maize. Generally, annual June-September rains have been timely and abundant; harvest and grazing prospects are positive for 2012/2013. The arrival of the main harvest in October is expected to lead to an improvement in grain availability and a decline in food prices. The desert locust situation deserves continued monitoring.

BURKINA FASO: Burkina Faso hosts some 107,000 refugees from Mali. Although the influx of refugees decreased over the last few months, it has not stopped. The presence of refugees on food and water resources, high food prices and conflict between refugees and host communities affect household access to sufficient and adequate food. Insufficient funding for response may hamper the continuity of assistance to refugees and hosts. According to the government, some 20,000 people have been affected by floods in 17 provinces. A joint assessment is on-going in order to identify needs. Food prices reached high levels during the lean season, between July and September. In September, grain price levels were well above last year for millet (+66 percent), sorghum (+52 percent) and maize (+21 percent). Although millet prices have started to decline in some urban markets, they remained unusually high in the food deficit areas targeted by on-going relief food distributions, such as the Sahel region (+67 percent). In pastoralist areas, terms of trade between small ruminants and the price of millet have generally been declining since the beginning of the year, limiting the ability of pastoralists to access food.The lean period is coming to end, as the main harvest begins in September and early October. The crop season went well thanks to regular and sufficient rainfalls. However, household food security status remains fragile as numerous households sold their assets, including livestock, or took on new debt during the 2012 food crisis. Trends in refugee arrivals and in food prices would determine food security outcomes in Burkina Faso in coming months.

CHAD: Some 1.8m people were food insecure in the Sahelian belt as of June 2012. Food insecurity rates increased from 45 percent in December 2011 to 48 percent in June 2012, with very high food insecurity levels in Bahr-el-Ghazal, Guera, Kanem, Ouaddai and Sila where over half of houeholds are food insecure. According to the June 2012 SMART survey, Global Acute Malnutrition rates are above the critical threshold of 15 percent in nine regions: Kanem (21.0 percent), Wadi-Fira (21.3 percent), Bahr-El-Gazal (21.4 percent), Batha (24.9 percent), Hadjer-Lamis (19.7 percent),Salamat (21.9 percent), Lac (15.5 percent), Sila (16.3 percent) and Ouaddaï (16,5 percent). In other regions such as Guera (12.6 percent) and Ndjamena (13.4 percent) malnutrition rates are high and exceed the 10 percent threshold. The 2012/2013 agricultural season is characterized by heavy rainfall causing extensive flooding in the south. An interagency assessment mission is on-going in affected areas. The vegetative cycles of all crops are progressing as expected and harvests prospects should be relatively good. The harvesting of food products (groundnuts, maize, and yams) since August has improved the food security situation and induced a drop in grain prices (millet, sorghum, maize) in both the Sahelian belt (4-37 percent drop) and the savannah (2-15 percent decrease) markets. With good harvest prospects, decreasing food prices, added to on-going responses, the food security and nutritional situation likely to improve over the next three months.

MAURITANIA: In spite of government interventions to respond to the food crisis, nearly a third of Mauritanian households were food insecure in July, the highest rate on record for the country. Nearly 1m people were food insecure, of which 800,000 in rural areas and 200,000 in urban areas. In addition to the chronically vulnerable South and East, food insecurity rates have sharply increased in Trarza, in the North (Inchiri, Adrar, Tiris Zemmour) and in Tagant. In 4 regions (Tagant, Assaba, Brakna, Hodh Echargui), GAM rates exceeded the 15 percent threshold, according to the July SMART survey. In the refugee camps of M'Bera the nutrition situation is critical, with GAM affecting 20 percent of children due to illness and inadequate food intake. The food security outlook will hinge on the outcome of the on-going rainy season. Rainfall patterns have thus far been favorable. Food prices have stabilized in 2012 at the high levels reached in 2011. As of July 2012, increases are noted for wheat (+40 percent), cooking oil (+34 percent), sugar (+20 percent) and imported rice (+17 percent) compared to July 2010. Local grains and cowpeas are either prohibitively expensive (+75 percent for cowpeas, +58 percent for sorghum) or not available. It is expected that higher international prices will pass through to domestic Mauritanian markets in coming months.

NIGER: According to the June 2012 SMART survey, the global acute malnutrition rate reached 14.8 percent, compared to 12.3 percent in June 2011 and 16.7 percent in June 2010. GAM rates exceed 15 percent in four regions; Zinder (15.9 percent), Maradi (16.2 percent) Tillabery (16.6 percent) and Diffa (16.7 percent). Overall the 2012 growing season is taking place normally. Production prospects are generally good, with the exception of Tillabery and Dosso. The government estimates that some 485,000 people have been affected by flooding as of late August. Food prices remain above the five year average, limiting household food access. Although market supply is improving thanks to good production, prices remain high due to high consumer demand. In August pastoralist terms of trade began improving, after having below the five year average since the previous harvest. UNHCR estimates that there are over 56,000 Malian refugees in Niger. Generally, food security conditions are expected to improve with the main harvest in October. However, following successive crises, very poor households are likely to continue to require assistance beyond September. WFP monitoring shows that these households are very indebted and have lost productive assets. The desert locust situation requires continued monitoring.

SENEGAL: Over a million Senegalese are estimated food insecure and have received WFP's assistance since April. The recent SMART survey shows that the GAM prevalence of children 6-59 months old has increased since November 2011. GAM rates are above the 15 percent critical threshold in Podor, Ranerou and Kanel departments, and above the 10 percent serious threshold in 13 departments. The poor 2011-2012 agricultural harvest, with the consequent depletion of household food stocks and the increase of local cereal and pulses prices, compounded with falling remittances, are the underlying causes of the food insecurity. Well ahead of the normal lean season (July-Sept) the majority of rural households became net buyers, without being able to afford the same amount of food as last year. This may also explain the high GAM rates. Moreover, recent floods have exacerbated the living conditions of the poorest families at the outskirts of Dakar and in the Fatick region, for which the government is responding through food assistance. Despite a potentially good harvest, Senegalese might be affected by the rise of global prices of imported cereals (such as wheat and maize) impacting the price of bread and poultry.

CAMEROON: The 2012-2013 agricultural season in the chronically food insecure northern region of the country benefited from abundant rainfall. However, flooding has also taken place, damaging crops in some areas. Maize has been the most affected crop. Government measures to regulate the price of imported goods such as rice and fish have been in place since 2008. In spite of these measures, food insecurity in urban areas persists due to weak purchasing power.

CÔTE D'IVOIRE: In the conflict-affected West, household food security remains a serious concern. The displaced populations who returned after June 2011 missed the planting season. As a result, most of them continue to rely on food aid until the October 2012 harvest. Recent attacks in this region led to the displacement of more than 5,000 persons, underscoring the volatility and the unpredictability of the situation in this region. Since June 2012, the Government has taken measures to mitigate high food prices, such as the reduction of illegal check-points, signing a memorandum of understanding with traders on the price of imported rice, and the suppression, for three months, of the value added tax for imported rice. As a result of these actions, in July and August 2012, the price of imported rice was more stable than local cereals. Food security conditions are expected to improve from October 2012, as the food and cash crop harvests take place.

GHANA: Preliminary results from the Ghana Comprehensive Food Security and Vulnerability Assessment indicate that over 1 million people were food insecure as of May 2012. This number includes a number of chronically food insecure people. As of September, food security conditions were gradually improving across the northern Guinea Savannah regions following several months of reduced food access during the annual lean season. The harvest of maize, groundnuts and other crops commenced in August in both northern Ghana and the south and bolstered households' food stocks and contributed to improved market supplies of grains and a decrease in prices. Despite the prospects of improved access to food, recent flooding in the three northern regions may affect the food security of affected households. A bumper harvest of maize grain has been reported in the Brong Ahafo and Ashanti Regions where the harvest has been completed, contributing to stability in staple food prices. Food security conditions will generally continue to improve from now until November and December 2012 as the harvest of various food crops will intensify during this period.

THE GAMBIA: The Gambia is in the process of recovery from a severe drought in 2011 but remains vulnerable to environmental and economic shocks throughout 2012. Over 206,000 people (12 percent of population) from small-holder farming households in over half of Gambia's farming districts are currently benefiting from emergency relief until the October 2012 harvest. Retail food and fuel prices are at an all-time high. For the first time, the retail price of rice has surpassed the benchmark of 20 Dalasi per kg as of August 2012. Nominal rice prices are 16 percent higher in the third quarter of 2012 than in the same period of 2011. The average price of coarse grains (maize, millet, sorghum) in July and August 2012 is almost 4 percent below the 2011 level. As of August 2012, fuel prices at pump level are 11 percent higher compared to the same month in 2011 and 41 percent above the price level in 2010. Windstorms and heavy rainfall has adversely affected nearly 34,000 people out of which 7,800 have been displaced. Farming households who had their livelihoods eroded by both the 2011 crop failure and the 2012 floods are particularly vulnerable to food insecurity.

SOUTHERN AFRICA

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

LESOTHO: The food security situation has significantly deteriorated for the second year in a row. At least 725,000 people (39 percent of the population) will likely be food insecure in 2012/13, up from 514,000 people last year. Low levels of food production imply that the bulk of household food will be acquired through purchases. The poor performance of the agricultural sector has limited casual labour opportunities, the main livelihood source for poor households. 2012/13 aggregate cereal production will cover less than 10percent of the annual requirements. Production of maize, sorghum and wheat declined by 77 percent, 80 percent and 52 percent respectively compared to last year. Food and fuel prices are also increasing. Since the beginning of the year, prices of maize meal increased by 12 to 25 percent. Since December 2011, and petrol prices are up by 12 percent. Diesel and paraffin prices increased by 4 percent in September. Weather forecasts issued by the Southern Africa Climate Outlook Forum and from a number of other forecasting institutions indicate below normal rainfall through the coming growing season, which would aggravate the effects of last season's poor crop performance.

MALAWI: According to the September IPC round, some 1.6m people are currently facing phase 2 Stress conditions, mainly in Southern districts. It is projected that phase 3 Crisis conditions could prevail in these areas by the January to March lean season. According to the latest VAC assessment, the number of food insecure people in Malawi has increased from 0.2 million in 2011 to 1.6 million in 2012. Although the 2012 harvest was below average, a surplus of 500,000 tons of maize is expected. Surpluses are located in districts the northern central regions. Almost all districts in the southern and some of the central region had low production in the 2012 harvest. Cumulative maize imports are on average 9 percent higher than last year, as a result of lower domestic maize availability. Informal cross-border maize trade with neighbouring Mozambique has increased. Currently, food is available at most markets but at high prices that are 52-105 percent above 2011 levels. The recent substantial devaluation of the currency is contributing to higher prices. As the lean season approaches, it is expected that maize availability will decline at some markets due to local maize shortfalls. Exceptionally high prices of maize are expected until March 2013.

SWAZILAND: According to the 2012 vulnerability assessment, 115,713 people are facing food deficits, compared to 88,511 in 2011, following a 12 percent decline in crop production in 2011/2012. According to the vulnerability assessment, some 42 percent of rural households and 67 percent of urban households cited price increase in prices as the primary shock they experienced. Swaziland has been experiencing relatively high inflation rates since June 2012 (at 8.72 percent as of September 2012) coupled with an unemployment rate of 29percent. Fuel prices are also increasing. Torrential rainfall and cold weather has caused the death of some 8,000 cattle. The lean season peaks in September and October.

ZIMBABWE: Food security prospects in Zimbabwe for 2012/2013 are the worse in the last three years. During the peak hunger period of January to March 2013, some 1.7 million will be in a condition of food insecurity, a significant increase from 1.3 million last year, according to the Zimbabwe Vulnerability Assessment. This represents some 19 percent of the rural population. The worst affected areas are Matebeleland North and South and Masvingo, as well as parts of Mashonaland, Midlands and Manicaland. A drop in agricultural production explains much of the increase in vulnerability. Aggregate cereal production for the 2011/2012 season was 33 percent lower than in 2010/2011, as a result of late rains, prolonged dry spells, especially in the southern half of the country, and poor access to crop inputs. Own cereal production, coupled with market purchases, is the main source of cereals from October to December. The Government Grain Loan Scheme is underway, however, coverage is low. WFP assistance from October 2012 to March 2013 to poor and vulnerable households is expected to ease cereal shortages in drought hit areas. Food prices are expected to increase as we approach the lean season. Below normal rainfall is forecast for the southern regions of Zimbabwe throughout the coming season which may aggravate conditions in regions hit by the last season drought.

MADAGASCAR: Following two cyclones in February 2012, market and household food stocks are low in several municipalities of the East, North East and South East. Household incomes have decreased in these areas. The 2012 rice harvest has declined this year, and vulnerable households are shifting to alternative foods such as imported rice, cassava and sweet potato. In the drought-prone South, rainfall was generally sufficient this year, leading to a decline in tuber prices. Nevertheless, cereal prices remain 25 percent higher than last year. In north Amboasary and east Bekily, a resurgence in insecurity and cattle rustling has taken place since May. Cattle thefts drastically reduce the capital that households rely on for food access during the lean season. Insecurity is also limiting physical access to markets, hampering households' ability to buy and sell goods and avail of casual labor opportunities. It is also limiting the transfer of food from surplus to deficit zones. An early onset of the lean season is expected; intense pressure on household livelihoods is expected between November and March in these areas.

MOZAMBIQUE: Some 255,300 people are food insecure (IPC phase 2 and 3), in 23 arid and semi-arid districts of the central and southern provinces, mainly due to moderate drought. This is the third year of drought in some southern and central districts, where households are increasingly selling productive assets. Some coastal districts also experienced cyclones, floods and heavy rains. The northern region is considered generally food secure (IPC phase 1). From July to August, the price of local maize has increased by 10 percent in the Centre and 8 percent in the south. The impact of the staple food price variations increased the cost of the basic food basket by 4.3 percent from July to August. Over the next 3 months, the current moderate drought may become more pronounced due to El Nino effects. Below normal rainfall is forecast for the central and southern regions of Mozambique throughout the coming season. The prices increases expected during the lean season could reduce poor households' access to food.

ZAMBIA: The food security situation in the country is fairly stable. The Zambia Vulnerability Assessment has revealed that most households are food secure despite a small decrease in overall staple food production. A population of 62,842 people living in five districts (Chama, Chikankata, Gwembe, Mambwe and Mazabuka) are acutely food insecure. Dry spells and flooding during the 2011/2012 rainy season are the main drivers of food insecurity in these districts. As the 2012/13 marketing season progresses, an increase in maize meal prices (due to high demand from millers) is contributing to food insecurity. Over the next three months, most rural households will continue to have adequate food stocks from own production. However, the situation will likely be different in areas that depend on food purchases, such as the valley and urban areas, as the prices of maize meal are likely to increase further. The peak lean period will be reached in December 2012 and January 2013 as staple food availability declines on markets.

ASIA

FOCUS: Afghanistan, Bangladesh, Cambodia, DPRK, Indonesia, Lao People's Democratic Republic, Myanmar, Pakistan, Philippines, Sri Lanka

PAKISTAN: According to the National Disaster Management Authority, flooding in September has affected some 4.5 million people. As of 25th of September, some 282,526 persons lived in relief camps. An IPC classification dated 27 September 2012 has concluded seven flood affected districts are in phase 3 (crisis) or 4 (emergency). A Multi Cluster Initial Rapid Assessment is underway, preliminary findings suggest that a large number of households lost their food stock; many markets have been badly affected with no food stock available, and access to markets severely limited due to flood waters. Even though prices of key cereals have remained stable in recent months they are significantly higher than a year ago, wheat by about 8 percent and rice by about 11 percent. There is an overall continued trend of rise in fuel prices which are 25 percent higher than a year ago, increasing transportation costs and thus putting pressure on food prices. In addition, the food prices are also likely to go up further in the context of rising food prices internationally in recent months.

PHILIPPINES: Results of the July 2012 national survey on hunger revealed that moderate hunger decreased from 18 percent in the first quarter of 2012 to 13.7 percent in the second quarter. According to the survey, severe hunger fell from 5.8 percent to 4.8 percent. Monsoon rains and tropical storms that hit the northern Philippines beginning in August 2012 have caused the displacement of over one million people. In Central Mindanao, conflict erupted between armed groups and government security forces in August 2012, resulting in the displacement of approximately 34,000 persons. Rice production for the first half of 2012 was 4.2 percent higher than in the previous year. Food prices remain generally stable. More rainfall is expected in the remainder of the typhoon season, through December 2012. There is a 50-percent chance that El Niño will develop towards the end of 2012. According to the national meteorological department, the El Niño phenomenon could explain the strong monsoon in the Philippines. This could potentially affect crop production and marine fisheries in the country.

SRI LANKA: The failure of the south-west monsoon has caused a severe drought in Sri Lanka, affecting over 1.3 million people in 20 out of the 25 districts. A rapid assessment was conducted by WFP Sri Lanka in 16 of the worst affected districts. Preliminary findings indicate substantial livelihood impact on a broad spectrum of the population and a deterioration of food security. Drought has affected paddy production in the March to September season. Government reports show that 76,000 hectares (19 percent of planted area) of paddy have been damaged. Expected paddy production stands at 1.1 million tons, a 29 percent loss compared to the forecast harvest for the season. In April this year WFP Sri Lanka, together with the Government of Sri Lanka, undertook a food security assessment in the formerly conflict-affected Northern and Eastern Provinces. Preliminary findings have confirmed that recovery is still taking place and that over one million people are food insecure in that part of the country.

AFGHANISTAN: According to preliminary results of the 2011-2012 National Risk and Vulnerability Assessment, published in August, some 7.6 million or 30 percent Afghans are food insecure (consuming less than 2,100 kcal per day). Among them, some 2.1 million are very severely food insecure (consuming fewer than 1,500 kcal per day) and another 2.4 million severely food insecure. The July-August 2012 Food Security and Livelihood survey conducted in 55 districts of 22 vulnerable drought-affected provinces, has showed that 34 percent of surveyed households are food insecure, and 40 percent are borderline food insecure. Overall cereal production in 2012 is forecast to reach 6.32 million tons, the second highest level in 35 years, implying that Afghanistan will be 94 percent self-sufficient for cereals this year. Owing to the large volume of cereal production and good pasture conditions, livestock production is expected to increase by 5 percent in 2012. Wheat and wheat flour prices, which decreased from August 2011 to June 2012, began increasing again in July. Prices are below August 2011 levels for wheat (-10 percent) and wheat flour (-5 percent). The current global wheat price increase could potentially pass through to domestic markets, due to trade linking Afghanistan to regional markets.

BANGLADESH: Wholesale and retail rice prices have been stable over the past months, thanks to a good harvest and sufficient public stocks. As of 17 September 2012, government stock of rice and wheat totalled some 1.5 million tons, 0.2 million tons higher than at the same time last year.In line with international trends, the wholesale price of wheat has increased by 9 percent from July to August and by 7 percent from August to September. However, the retail price of wheat flour remains unchanged. There are speculations that price of soybean oil may rise in the coming months due to the increase in soybean prices in the global market.

Domestic fuel prices have been stable since December 2011. Based on the wage data collected by WFP, male agricultural labourers' purchasing capacity in the vulnerable northern region of Bangladesh was 9 kg rice per day in July and August. This is 18 percent higher than a year ago, mostly due to lower rice prices. Terms of trade are expected to change during the in September and October lean season, when both daily wage rates and work opportunities decline.

CAMBODIA: This year, early rainfall in May contributed to timely sowing of rice seedlings and transplanting, but a dry spell in August affected rice cultivation in 6 of 24 provinces. According to the government, an estimated 13,713 ha of transplanted rice were destroyed as of 29 August 2012. This will likely affect the progress of the rainy season rice production and may cause rice price increases. Negative impacts on the food security situation are possible should there be a poor yield from this year's harvest. The recent increase in international food prices has not yet affected domestic food prices in Cambodia. Year-on-year comparison of food and fuel prices indicates that the current food price trends are following expected seasonal trends. As of the third quarter of 2012, households relying on unskilled wage labor are experiencing deterioration in food access.

DPRK: A WFP review, conducted in July 2012, found that household food consumption has improved compared to 2011. However, food consumption indicators remain poorer than in 2009 and 2010. Currently 57 percent of households have 'borderline' food consumption. Some of these households may be at risk of slipping into the 'poor' consumption category in the occurrence of a shock, such as reduced food production or a reduction in food ration levels. Household dietary diversity remains poor with 83 percent having poor dietary diversity (<4.5 food groups). Some 60 percent of the households are limiting food portions and/or adding more water to food, which could lead to insufficient nutrient intake. In June 2012, the government reported a significant drop in estimated production of early crops (wheat, barley, potato), which is assessed at 207,000 tons, well below the estimate of 500,000 tons from the 2011 CFSAM. Production from the main harvest will be assessed during the September-October 2012 CFSAM. A national nutrition survey, a joint assessment by the Central Bureau of Statistics, UNICEF, WFP, and WHO, is ongoing.

INDONESIA: Approximately 25 million people are food insecure, particularly households engaged in food and cash crop subsistence farming and agricultural wage labor. The majority of them live in the east of the country, where 40 percent of the population live below the national poverty line, above the 13 percent national average. Despite stable paddy production, the price of rice is one of the highest in the South East Asia region, with a continued upward trend. In July 2012, rice cost 12 percent more than the same time last year, while real wages for agricultural labor decreased by two percent. Although the Ministry of Agriculture is optimistic and estimates rice production in 2012 to increase by 4.31 percent from last year, rainfall deficits are reported. Due to the drought situation in the US, the price of imported soybean increased nearly twofold in July. Soybean products are important commodity especially for low income people. Indonesia consumes 2.2 million tons of soybeans per year while the country produces 700,000 tons. As a result, the Government of Indonesia has decided to suspent the five percent of import tax on soybeans.

LAO PEOPLE'S DEMOCRATIC REPUBLIC: Laos is currently enduring the lean season. Some 40,000 people affected by tropical storms Haima and Nockten in four districts of Khanmouaue province will receive assistance until mid-October, when they will be able to rely on this year's harvest. These vulnerable communities have poor access to irrigated land, wage labor and markets were particularly affected. According to the Lao Statistics Bureau, the price of rice has been consistently decreasing over the past year (-2.3 percent), as the government limits rice exports in the aftermath of tropical storms Haima and Nockten. However, the prices of meat (beef, buffalo meat, and pork), fruits and vegetable are increasing. The inflation for the food component of the CPI stands at 3.6 percent. 2011 was a rice surplus year, with rice per capita availability 490kg person, well exceeding estimated per capita needs of 350 kg. Conditions for the 2012 crop are favorable, with planting and transplanting occurring timely. However rice production may slightly decrease due to low prices. According to the Mekong River Commission, the rise in the Mekong River in July was typical. Two localized episodes of flash flooding occurred in Nan district of the Laugprabang province. As the rainy season draws to a close, and with no large tropical storms projected, it is expected that shocks will not threaten household food security.

MYANMAR: Moderate levels of food insecurity are currently observed in most monitored areas (Shan State, the Dry Zone and northern Chin State) but food insecurity is decidedly more severe in northern and central Rakhine State and parts of southern Chin State. Overall, the outlook for the next three months is positive as food availability should improve with the coming monsoon harvests. This positive outlook is tempered somewhat by the succession of natural and man-made disasters which have recently impacted various parts of the country. August flooding in Ayeyarwady Region will impact the country's rice production. Close to 126,000 acres of paddy were damaged while 55,000 were destroyed. While losses could be mitigated to some extent by a second planting post monsoon, shortfalls are projected to impact local and regional rice prices in the coming months. Heavy rains alongside conflict and insecurity are currently impacting rice production in parts of Rakhine, Kachin and Northern Shan States, as significant amounts of paddy land were not accessible for cultivation. Drought-like conditions in August in Magway have damaged the sesame, groundnut and pigeon pea harvests. Consequently, sesame and groundnut prices are now 70 percent higher than last year. While the situation has since stabilized, increased debt and loss of livestock (due to distress selling) will continue to impact households in the near-term.

MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

FOCUS: Egypt, Iran, Iraq, Jordan, Kyrgyzstan, Lebanon, occupied Palestinian territory, Syria, Sudan, Tajikistan, Turkey, Yemen

SYRIA: Three million people are in need of food or livelihoods assistance according to a June 2012 FAO/WFP/Ministry of Agriculture report. Out of these, 1.5 million Syrians, particularly families who moved from their places of origin to other safer areas, require urgent and immediate food assistance. It is estimated that the farming sector has lost $1.8bn due to the events this year as food and cash crop commodities, livestock and irrigation infrastructure have been damaged. Many poor households have lost their livelihoods as they were forced to abandon their farms or leave crops unattended due to lack of labour, scarcity of fuel, or rise in fuel costs. Obtaining water, food and medical care has proved difficult for residents in affected areas. People have continued to cross borders, bringing the number of Syrian refugees in Jordan, Lebanon, Iraq and Turkey to over 311,500 as of 2 October 2012 based on UNHCR statistics, more than three times as high compared to June. Most of the refugees have left their home communities with no or very few belongings and are fully dependent on assistance. Given the current situation in Syria, it is expected that the humanitarian needs will continue into 2013.

YEMEN: According to the IPC round which was released in August 2012, 46 percent of the Yemeni population or more than 10.5 million people are food insecure; 24 percent (5.5 million people) are in the emergency and 22 percent (more than 5 million people) in the crisis phase. Displacement and conflict in various parts of the country continue to be the major threats to food and livelihood security affecting both IDPs and host communities. More than half a million people are internally displaced among which 335,000 are from the North and 210,000 from the South corridor. The situation is further exacerbated by increasing global food prices putting pressure on local markets and people's ability to afford basic food stuff. Yemen is largely dependent on wheat imports to meet national consumption needs. An Oxfam study conducted in Hodeida, found that families have started to skip meals; children from vulnerable households are taken out of school; and negative coping mechanism such as child labour and early marriage are on the rise (July 2012). Overall, the food security outlook for the next three months is bleak with the potential for further deterioration if international food prices continue to rise and local conflicts intensify.

SUDAN: Rains have been above-average in much of Sudan and there are prospects for a good harvest. Crop development has been progressing well, with few exceptions in the northern and eastern parts of the Kassala state due to major dry spells and in southern Blue Nile where areas have not been cultivated because of insecurity. In North Darfur better access to water and good pasture improved livestock conditions. Food prices remained high compared to last year due to poor cereal production in 2011 and insecurity problems in South Kordofan and Blue Nile that are sorghum-surplus areas. In August 2012, sorghum and millet prices went up in most markets from 55 to more than 200 percent compared to the same period last year. Across all states the price of the minimum healthy food basket increased by more than 60 percent in August from 12 months earlier. With the separation of South Sudan, losses in oil revenues led further devaluation of the national currency. Low levels of hard currencies and very high inflation rates (above 40 percent) impacted the national economy. Overall food security conditions should improve in coming months as the harvest arrives. Staple cereal prices are expected to drop or to remain stable, improving households' food access.

EGYPT: As of June, 74 percent of vulnerable households did not have sufficient income to cover their monthly basic needs, unchanged from March 2012. Forty three percent of those households cover their minimum needs by relying on pensions, assistance from the Government or families/community members. Although inflation rates have been moderate during 2012, food price levels remain high. The monthly inflation went up between July and August driven by 2.5 percent increase of food prices. Some of the most vulnerable households have ceased consumption of certain food items, with over 75 percent pointing out price increases as the main factor of households' low purchasing power. Economic growth is likely to show some mild improvements between September and December 2012 as the confidence in the Egyptian market is expected to improve. Foreign investments might increase with the signing of the IMF loan to Egypt and the balance of payments is likely to improve compared to 2011/2012. On the downside, global food prices are expected to increase during the last quarter of 2012, leading to continued inflation of domestic food prices and increasing pressure on the fiscal budget. The exchange rate is expected to further depreciate.

IRAN: In early October, the Iranian Rial depreciated significantly against the US dollar during late September/early October. The plunging value of the currency has undoubtedly made food purchases and food access much more difficult for low income households. The refugee population within Iran are amongst the most vulnerable. A recent Joint Assessment Mission (JAM) conducted by WFP and UNHCR in July concluded that around 20 to 25 percent of refugee households living in settlements are extremely vulnerable to food insecurity. The country hosts one of the largest and most long staying refugee populations in the world. As of December 2011, the official number of remaining refugees in Iran stood at more than 886,000 people, most of them from Afghanistan and a small caseload from Iraq. Most refugees reside in urban areas and only 3 percent are living in refugee settlements where they receive support from both UNHCR and WFP. According to the JAM, there are sharp disparities in sources of income and earnings within a settlement. Households with stable jobs and more than one breadwinner are better-off, while female headed households and households with elderly, disabled or chronically ill family members are among the most vulnerable. Most respondents reported a loss in their purchasing power due to increasing food prices.

IRAQ: During the early stages of the displacement of Syrian refugees, it had not been anticipated that large numbers of Syrians would flee to Iraq. However, currently, 33,704 Syrian refugees have been registered or are awaiting registration as of 2 October 2012. This is six-times more than three months ago. In addition, more than 37,000 Iraqis have returned from Syria since June 2012. Most Syrians arrived with little cash, having had to deplete their resources while still in Syria. Syrians are scattered throughout northern Iraq with a concentration in the Kurdish Region. Particularly refugees residing in the Domiz camp have limited access to income generating opportunities. According to a recent Joint Rapid Needs Assessment by the Government, UN and NGOs, a large proportion of Syrian refugees are currently in need of food assistance.

JORDAN: As a small, middle income country with significant levels of unemployment (13 percent), Jordan is confronted with an increasing inflow of Syrian refugees. As of 2 October 2012, 103,488 refugees have been registered with UNHCR or awaiting registration, an increase from 35,000 in June. Jordan has maintained its borders open for Syrians. The majority of the refugees are living in urban locations, either with host families or in private accommodation. The presence of thousands of Syrian refugees throughout Jordan has put a strain on public services such as water, health and education. According to a joint rapid nutrition assessment led by UNICEF in the Za'atari Refugee Camp, 2.3 percent of children under-5 were acutely malnourished and an additional 6.9 percent are at risk of acute malnutrition based on MUAC measurements. To take advantage of fully functional local food markets WFP has implemented a value-based food voucher assistance programme. In addition, welcoming food packages and hot meals are provided to refugees residing in transit centres and camps.

KYRGYZSTAN: The most recent monitoring of WFP beneficiaries revealed that on average 58 percent of household budgets were spent on food. Poor households depending on markets are particularly vulnerable to food price increases. Similar to Tajikistan, national prices have increased sharply during July and August this year. In July, the price of wheat flour (the primary staple food in the country) increased by 23 percent in rural areas and by 27 percent in urban areas compared to the previous month. Prices continued to increase in August by 10 percent and 7 percent, respectively. The increase of export prices in Kazakhstan and the predicted decrease in domestic production by 25 percent continue to be major concerns for price stability in the near term. The next round of the joint World Bank/WFP initiative to monitor the social impacts of the food price crisis in Kyrgyzstan and Tajikistan is scheduled to take place in October/November.

LEBANON: As of 2 October 2012, the country is hosting 80,800 registered refugees or refugees about to be registered by UNHCR, an increase from about 28,000 in June. More than half are located in the governorate of North Lebanon, the remaining are in the Bekaa valley and around Beirut. Refugees do not have permits enabling them to circulate freely in Lebanon, nor are they entitled to work. They are therefore heavily dependent on the support of local communities and humanitarian assistance. North Lebanon and the Bekaa valley - are among the poorest regions in the country, with a lack of social services, weak infrastructure, limited livelihood opportunities and harsher climate particularly in the winter months. WFP is implementing a food voucher programme which is gradually expanded to reach refugee households in the Bekaa valley, Beirut area, North and South Lebanon. It is anticipated that those currently registered are expected to remain in Lebanon throughout 2012. The overall number is likely to increase due continuing registration and new arrivals.

oPt: The number of food insecure people could increase from 1.3 million to 1.9 million by the end of 2012 according to the recent WFP/FAO/UNRWA Food Security Watch (September 2012). Based on simulations – using the most recent Socio-economic and Food Security Survey (SEFSec, October/November 2011) as a basis and assuming stable income levels – the number of food insecure households has risen from 27 to 34 percent in August 2012 due primarily to increasing consumer prices. If price increases continue at the same rate, 41 percent of Palestinians will be food insecure by the end of 2012. Beside the impacts of high food and fuel prices, internal movement restrictions remain a concern. According to an OCHA report released in September 2012, a series of easing measures improved the connectivity between many rural settlements and nearest cities; however the access to large rural areas, including those located behind the Barrier, in the Jordan Valley, and in the vicinity of Israeli settlements remain severely restricted. The results of the next SEFSec are expected to be released in early 2013.

TAJIKISTAN: The food security situation is expected to have improved over the summer months. Households benefited from the ongoing domestic harvest, improved livestock health and breeding, higher remittances compared to previous years and seasonal job opportunities. According to the qualitative monitoring conducted by WFP with World Bank support in July/August covering both Tajikistan and Kyrgyzstan, the impacts of the increasing global and national food prices have not yet transmitted to the community and household level. The situation is likely to deteriorate during the next season due to the following factors: start of traditional lean season with higher food prices and declining income earning opportunities; reduced inflow of remittances; and poorer wheat production prospects in Kazakhstan, the main export country of wheat in the region, combined with internally increasing wheat prices. The next round of food security monitoring is taking place in October feeding into the food security classification process (IPC) in November.

TURKEY: Since the influx of Syrians into Turkey began, the Government has formally declared and maintained an open border policy. As of 2 October 2012, there were more than 93,500 Syrian refugees receiving assistance in camps in the four border provinces of Hatay, Sanliurfa, Gaziantep and Kilis, up from 30,000 in June. Most of the food requirements are currently provided by the Turkish Government. Closely coordinated with national and international partners, WFP will launch its food voucher programme in September and target up to 30,000 Syrians in October 2012. The food security situation of refugees in the country will be closely monitored through a system to be devised in consultation with Government and based on accessibility to camps.

LATIN AMERICA AND CARIBBEAN

FOCUS: Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Peru

EL SALVADOR: The Eastern region experienced a severe drought in August. About 24,000 affected households have been identified in the departments of La Unión and San Miguel, according to the Ministry of Agriculture. Losses are estimated at 10 to 16 percent of the country's total grain production. In 2011-2012, heavy rains from tropical storm 12-E had already affected national maize production. Farmers in the east are therefore facing a second consecutive year of low production and are starting this year with limited food reserves. The government is seeking to limit price speculation and impacts on food reserves in the affected areas. A recovery plan has been launched to provide maize and bean seeds to some 21,000 farmers. Production losses in neighboring Central American countries could compound domestic price increases in upcoming months. According to the Ministry of Environment and Natural Resources, low rainfall levels are forecasted in the next three months due to the El Niño event, which could continue to disrupt grain production.

GUATEMALA: As a result of the crop losses in the first harvest due to an extended drought period in July and August 53,297 households in 66 municipalities and in 979 communities are food insecure. The drought has affected maize and beans, two of the main staples, with losses estimated at some USD 10.7 million. Further impacts on food availability due to the El Niño phenomenon are expected in December 2012, at the time of the second harvest. Meanwhile, in August food prices have risen by the largest month-to-month percentage increase in the year, where bean and maize wholesale prices have increased by 12 percent and by 10 percent respectively since July. It is expected that the effects of this event will last till early 2013, when most households rely on their second harvest for consumption. As of August, the Ministry of Health reported 8,348 cases of acute under nutrition and predicts a further increase during the next month.

HAITI: Some 4 million people in Haiti are food insecure, and an additional 1 million suffer from poor economic access to food. The spring harvest was poor due to insufficient rainfall at a critical period for crop development. Some areas are facing a second consecutive year of poor crop production. Tropical storm Isaac damaged summer crops and caused localized damage of up to 90 percent on maize, beans, banana, fruit). Areas most affected by crop losses include the North-West, South-East and West départements. National food production will only cover half of food needs. Commercial imports will not entirely offset the deficit. Furthermore, food prices started to increase last August, which will impact the urban population.

HONDURAS: Drought, has caused crop losses for the first harvest, which began in August. The most affected areas are located in southern part of the dry corridor, in the departments of Valle, Choluteca, Southern Paradise and Francisco Morazan. Increasing food prices and poor agricultural production are constraining household food access. The affected vulnerable population is currently dependent on food purchases. Due to crop losses, white maize retail and wholesale prices rose by 14 percent and 13 percent respectively in July. However, during the same month, the overall Consumer Price Index (CPI) behavior continues to indicate a temporary slowdown in inflation caused mostly by a decrease in fuel prices. It is expected that prices will decrease over the next few months due to the arrival of main harvest season. On the other hand, the sharp increase of maize and wheat prices in the USA might influence domestic prices in the coming months. Below-normal rains are forecasted for the next three months, which could affect the second harvest in the fourth quarter. Under that scenario, the lean season would start earlier than normal in 2013.

ECUADOR: Since June, drought has affected several provinces, impacting food availability and prices. Manabi is the most affected province, and has experienced significant crop and livestock losses. In August, ash emissions from Tungurahua volcano affected crops in the central highlands. As a result of these climatic events, the prices of agricultural products have increased affecting the household's purchasing power. In August, the price of rice reached USD 990 per ton, some 11 percent higher than in July. Vegetables prices increased from 20 to 50 percent between July and August. The increase in international wheat prices has had an impact on the local cost of wheat flour; bakers are negotiating with government to increase the cost of 'popular' bread, which is fixed by the government. The dry period in the highlands is expected to last until late December. The rainy season will start in the coastal region in late September and last until March 2013. Possible impacts of the El Niño phenomenon may be felt in coming months, and could lead to crop damage.

PERU: From January to August 2012, the cumulative increase in food prices was about 3.2 percent, which is within normal ranges. Domestic food prices are evolving according to expected seasonal trends. However, of the increase in international food prices might impact the national market by the end of this year. National authorities are considering a decrease in food imports rates to reduce the impact of high prices, especially on the most vulnerable population.

DOMINICAN REPUBLIC: Increases in fuel and transportation costs triggered staple food prices hikes at the beginning of the year. In the third quarter of 2012, prices stabilized at high levels. Heavy rainfall and weather-related pests have affected crops, particularly rice and banana, which are primary staples. The corn and soybean crisis in the United States is not expected to impact the Dominican Republic as neither commodity is widely consumed in the country.



Acronyms

CFSVA	Comprehensive Food Security and Vulnerability Analysis
CPI	Consumer Price Index
DPRK	Democratic People's Republic of Korea
DRC	Democratic Republic of the Congo
EFSA	Emergency Food Security Assessment
FAO	Food and Agriculture Organization of the United Nations
FEWSNET	Famine Early-Warning Systems Network
FSMS	Food Security Monitoring System
FSNWG	Food Security and Nutrition Working Group
GAM	Global Acute Malnutrition
IDP	Internally displaced person
IMF	International Monetary Fund
IPC	Integrated Food Security Phase Classification
JAM	Joint Assessment Mission
MUAC	Mid-Upper Arm Circumference
NGO	Non-Governmental Organization
OCHA	Office for the Coordination of Humanitarian Affairs
oPt	occupied Palestinian territory
SEFSec	Socio-Economic and Food Security Survey
SMART	Standardized Monitoring and Assessment of Relief and Transitions
SNNPR	Southern Nations, Nationalities and People's Region
UN	United Nations
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
USA	United States of America
USD	United States dollar
VAC	Vulnerability Assessment Committee
VAM	Vulnerability Analysis and Mapping
WFP	World Food Programme
WHO	World Health Organization
ZimVAC	Zimbabwe Vulnerability Assessment Committee

Information sources

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WFP: www.wfp.org/food-security

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Germany and Spain support the preparation of the Global Update.

BMZ Federal Ministry for Economic Cooperation and Development

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