



Country Summaries

ANNEX TO THE GLOBAL FOOD SECURITY UPDATE



EAST AND CENTRAL AFRICA

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

DEMOCRATIC REPUBLIC OF CONGO: Food security in the DRC deteriorated further during the last quarter of 2012. Based on the IPC analysis of December 2012, about 6.4 million people are in acute food security and livelihood crisis, requiring food and agricultural assistance. This figure represents an increase from 5.4 million in June 2012 and 6.3 million in October 2012. The renewed fighting between the armed forces and the M23 movement in mid-November 2012, contributed to the deterioration of the food security and nutrition situation, especially in North Kivu province. Armed conflict has disrupted trade and resulted in high staple food prices. In November 2012, the nominal retail price of cassava flour increased by 14 percent compared to October and by 107 percent compared to November 2011.

In the provinces of South Kivu, Orientale, Maniema and Katanga, armed conflict continued to displace people and disrupt livelihoods, causing a subsequent deterioration of food security and nutrition conditions. According to the preliminary results of the comprehensive emergency food security assessment (EFSA) conducted by WFP, FAO and the Ministry of Agriculture in October 2012 in South Kivu, more than 950,000 people (18 percent) are affected by severe food insecurity. The nutritional situation remains alarming, particularly in the Minova health zone in South Kivu province, where the rate of global acute malnutrition was found at 10.8 percent, according to the results of the nutrition survey conducted by the PRONANUT during the last quarter of 2012.

BURUNDI: According to the October 2012 food security monitoring system (FSMS) round, carried out during the lean season, 43 percent of the population was food insecure. Households in Bugesera, Buyenzi and Kirimiro regions were the most affected. While food security seems to have declined since the last IPC assessment in July 2012 (B season harvest period), data from successive FSMS rounds carried out since 2009 nonetheless indicates a gradual trend of improved household food security levels during the lean seasons over past years. Food inflation is eroding household purchasing power, with staple food price increases of 20 percent since August. The steady devaluation of the local currency is considerably impeding food imports; the government has exempted staple food imports from taxes. In the Northern Depression livelihood zone, households are selling standing crops selling food stocks to obtain cash, with a considerable negative impact on the food security of the most vulnerable.

The situation is expected to improve in most livelihoods zones with the season A harvests in January-February 2013. However, crop production may be hindered in some local areas due to above normal rainfall. Food prices are expected to slightly stabilize with the A season crop harvest and the tax exemption on food imports that will remain in place until June 2013.

DJIBOUTI: Djibouti is currently facing (IPC phase 2) and crisis (IPC phase 3) conditions. According to the last WFP EFSA conducted in May, some 67,000 Djiboutian are food insecure. An urban assessment in the capital Djibouti in November 2012 showed that 18 percent of households living in poor neighborhoods (Balbala and Boulaos) of the capital are food insecure. In both rural and urban areas, severely food insecure households lack enough income to afford a food basket that meets the nutritional requirements; their expenditures on food purchases are nearly 75 percent. In urban areas the food consumption of severe food insecure households covered on average 1,490 Kcal (around 70 percent of the recommended 2,100 Kcal/person/day) and 80 percent of households in severe food insecurity are deficient in protein, iron and Vitamin A.

This year's current and projected rainfalls are 30 percent below average, which may affect animal production and limit access to drinking water for pastoralists and the rural population.

ETHIOPIA: Food security has continued to be stable thanks to the start of the Meher October – December harvest and the provision of humanitarian assistance. The Central Statistical Agency pre-harvest forecast puts 2012/2013 Meher grain production from private holdings at 22.9 million tons, 4.8 percent higher than that of 2011/12, with good prospects in the Western, surplus-producing half of the country. However, there were crop losses in localized areas of Tigray, eastern Amhara and low-lying areas of Oromia regions, due to erratic June-September rains. Prospects in farming areas of Somali region are also poor. In such pockets, substantial survival and livelihood deficits among affected poor and very poor households with limited capacity to cope with food gaps.

Currently, water and pasture availability, livestock condition, and milk productivity is reasonably good. But in isolated localities in the eastern half of the country affected by erratic rainfall and poor conditions, early livestock migrations may occur. Improvements in pasture and water availability is not expected in the coming three months and could affect households' income and food security. Overall, the good Meher harvest should have a positive impact on market supply and prices of staple foods at least in the first three months of 2013. Already, prices of cereals are showing either stability or slight declines in some of the markets. Further declines in food prices are expected as harvesting and threshing wind up and more grain flows to the markets.

KENYA: During the October – December period, the vast majority of Kenya was in IPC phase 2 (stressed) with the exception of the Marginal Mixed Farming zone that was in phase 3 (crisis). Overall, some 2 million people in the country remained food insecure. Kenya is a food deficit country and its agriculture is primarily rain fed; the two annual rainy seasons are key food security drivers. Contrary to the forecast, the short rains from October to early December turned out to be below average and poorly distributed in time and space. However, rainfall picked up in December 2012 and as a result, most parts of the south-eastern and coastal marginal agricultural areas received near normal to above normal rainfall amounts. In pastoral areas, the short rains were above average and well distributed in the north-western areas, while it has been mixed in the northern and north-eastern areas. Water and grazing conditions have improved, resulting in improved livestock body conditions, increased milk availability, and an increase in livestock prices. In agricultural areas, the availability of labour opportunities were limited due to the poor start of the rainy season and households have temporally been selling livestock and charcoal in order to purchase food and to meet other immediate needs. Food consumption has consequently improved during this period and follows the expected seasonal trend also as a result of traditional vegetables production from November onwards.

Continued rainfall in January 2013 will likely reduce rain deficits further in many pastoral areas, regenerating more pasture and browsing to support normal livestock activities. Maize prices have remained stable since September and are lower than during the crisis in 2011, however, they continue to be higher than 5 year average. There has been a general improvement in nutritional situation with the exception of Wajir and Mandera where GAM prevalence remain high due to insecurity and consequently poor access to health facilities. The 2012/2013 short rains assessment is underway and the number of food insecure households will be updated based on the current situation analysis around in February.

REPUBLIC OF CONGO: According to the 2009-2010 CFSVA, 7.8 percent of households in Republic of Congo are food insecure. Congo relies heavily on food imports and thus households' food security depends on their access to markets and key commodity prices. During the last quarter of 2012, prices of cassava and wheat flour stabilized but remained higher than the previous year. A comparison between retail prices in Brazzaville from January 2012 to January 2013 shows a 13.7 percent increase in the price of fufu, 22.6 percent for rice, 55.7 percent for fish, 43.6 percent for groundnuts, 10.5 percent for wheat flour and 4.5 percent for cassava. Favourable rains benefitted cassava harvests which are underway. According to FAO, tentative estimates for 2012 production are similar to the average of the previous five years. As domestic food production is low, food security prospects will increasingly rely on households' access to food markets in a context of increasing food prices.

RWANDA: According to the September 2012 FNSMS, 31 percent of rural households were food insecure (excluding Kigali province). This is an increase from March 2012 when 23 percent of the households were food insecure, and reflects seasonal food insecurity that is expected to increase until the December/January harvest season concludes. The Western province remains the province with the highest percentage of food insecure households, especially along Lake Kivu and the Congo Nile Crest, at 55 percent and 45 percent respectively. In terms of nutrition, the situation appears to be stable. The FNSMS results confirm the March 2012 levels of chronic malnutrition (stunting) are still very high at 44 percent (excluding children living in Kigali province) and the level of underweight children (excluding Kigali province) was poor at 10 percent. Wasting is the only nutrition indicator within acceptable limits. Rwanda has a bimodal rainfall pattern with two main agricultural seasons; the 2013 agricultural season 'A' rains (October to January) were above normal and as a result, a normal to above normal season 'A' harvest is expected. It is anticipated that after season 'A' harvests most households will have food stocks until March/April 2013 when the next lean season begins.

SOMALIA: As a result of the good Deyr rains (October to December short-rains) and continued humanitarian response, the food security situation has improved since September 2012. At that time approximately 2.12 million people were classified in crisis or emergency (IPC phases 3 and 4). Since then crop development was mostly normal in agro-pastoral zones, while pasture and water have been available for livestock, benefiting pastoral communities. The purchasing power of poor households has also increased, as the terms of trade between labour or livestock and cereals have improved. The nutrition situation has also shown improvements or was sustained in most parts of the country over the last three months, with the some local exceptions (e.g Hiran). Most IDP settlements remain classified in critical or very critical situation.

Over the next three months, most of the country is expected to remain in or improve to stressed (IPC Phase 2) conditions, with the exception of some coastal areas and some agro-pastoral livelihood zones in the south, which are expected to remain in crisis (IPC Phase

3) or improve from emergency (IPC Phase 4), due to low livestock holding and/or below normal crop production projections. Some districts in these areas have received below average seasonal rains, which might negatively impact the food security situation during the long dry season (January to April). The projections for the nutrition situation (December to March) are critical to very critical in all livelihood zones and IDP settlements of southern Somalia. In the north, the nutrition situation is likely to be serious with some exceptions. Preliminary findings from the post Deyr assessment seem to indicate a general improvement in the nutrition situation in most of the country.

SOUTH SUDAN: The season witnessed improved and stable food security situation within the Greater Equatoria and Western Bahr el Ghazal. This is attributed to better household food consumption resulting from short-term increase in food availability, improved terms of trade and lower food prices following the post-harvest season. However, the Greater Upper Nile, Lakes and Warrap states showed stressed food security situation with pockets of crisis levels in Jonglei State. The main drivers of food insecurity in these areas include widespread floods; insecurity associated with armed conflict and cattle rustling and impeded trade between Sudan and South Sudan due to border tensions.

Whereas food security situation is projected to remain stable in most regions of Greater Equatoria, most parts of Western and Northern Bahr el Ghazal, localized deterioration is foreseen mainly in Eastern Equatoria (Kapoetas). Food security situation is also expected to decline in most parts of Greater Upper Nile (mainly to IPC Phase 3) but also emergency (phase 4) levels could occur in parts of Jonglei if conflict persists. Continued border tension, conflicts over water and pasture resources due to the anticipated drier-than-normal dry season will heighten the deterioration. Higher market prices will also prevail in many areas fueled by shortage of hard currency and impeded import flows. It is estimated that around 2.3 million people will be food insecure in 2013, including residents, IDPs, refugees, returnees and displaced people from Abyei in 2013.

TANZANIA: The 2011/12 crop production forecast identified a total of 41 districts in Tanzania mainland vulnerable to food insecurity during the 2012/13 marketing year. Consequently, a joint assessment led by the Government was carried out in September 2012 to assess the impact of the poor rainfall and other indicators on food and nutrition security in 10 regions covering all 41 districts. The assessment identified a total of 527,000 people who are acutely food insecure and in need of food assistance between November 2012 and February 2013. On severity, the results indicated that 70 percent of the assessed districts had stressed food insecurity (Phase 2) whereas 15 percent of the surveyed councils were under crisis food insecurity situation (Phase 3) in which most of households are marginally able to meet minimum food requirements.

The 2012/13 agricultural season is under way with poor October to December rain performance; rainfall was below 80 percent of average in over two thirds of the country. Most food security indicators deteriorated towards the end 2012 and in early 2013, this is typical to a lean season but with much intensity and severity than usual. This has been associated with the drastic increase of maize (staple food) prices during October – December 2012. Prices are expected to remain high until February when Vuli harvests enter the markets.

UGANDA: Due to the cumulative positive impacts of average to above average first and second season harvests in 2012, acute food insecurity in the country is considered to be at the Minimal (Phase 1) level. Most parts of the country received normal to above normal rainfalls during the first (April-July) and second (September-December) rainy seasons consequently having a positive impact on food production and harvests, despite localized water logging that reduced crop yields in some parts of eastern Uganda.

In the drought-prone, agro-pastoral Karamoja region in north-eastern Uganda that is dependent on a single long rainy season (April-September), the harvest is projected to be below average in many parts of the region. As a result, acute food insecurity in most parts of Karamoja is expected to be at Stressed (Phase 2) level during January-March 2013. Persistently high levels of global acute malnutrition rates of 10 percent and higher remain a serious concern in Karamoja.

WEST AFRICA

FOCUS: Mali, Central African Republic, Burkina Faso, Chad, Côte d'Ivoire, Guinea, Guinea-Bissau, Liberia, Mauritania, Niger, Senegal

MALI: In early January, hostilities resumed between armed groups on the one hand and Malian armed forces, supported by an international coalition. WFP monitoring shows that movement of people and goods between the south of Mali and the north has been disrupted due to insecurity. As of late January food supply to the market of the Douentza in Mopti region was disrupted. Borders with Algeria have been closed, causing food and fuel prices to immediately increase in the northern town of Kidal. Food flows to the northern Malian regions of Gao and Tombouctou from neighboring Niger and Mauritania have slowed. Prolonged trade disruptions would create conditions for speculation and an aggravation of the precarious food security situation in the North, a food-deficit area. Prior to the resumption of military operations in January, grain prices had been following a downward trend in Mali.

Overall some 400,000 Malians have been displaced by the conflict in the past year. As of 24 January, UNHCR reports that a limited number of new refugees have arrived in Algeria Burkina Faso, Mauritania, and Niger since the resumption of military operations. The number could change, subject to conditions in the field. Due to military operations, humanitarian access to the north remains limited.

CENTRAL AFRICAN REPUBLIC: Since a December offensive, half of the country has come under the control of the rebel Séléka coalition. A peace agreement was signed in early January, bringing the offensive to a halt. Initial assessments show that the Séléka's offensive led to some population displacement and damage to infrastructure. Insecurity has caused some disruption to agricultural production and trade; an increase in cattle rustling has been reported. Further assessment work is required to establish the extent and severity of food insecurity in the rebel-occupied zone.

The Seleka controlled zone accounts for more than half of national food production and covers surplus producing areas such as Ouaka, Kemo, Nana Gribizi, Ouham, Basse Kotto, Bamingui-Bangoran and Vakaga prefectures. Should trade disruptions continue, food supplies in Bangui might dwindle. Prior to the crisis, 30 percent of the central African population was known to be food-insecure; two-thirds of the population lived below the poverty line. A November IPC round had placed the entire country in phases 2 (stressed) and 3 (crisis).

BURKINA FASO: Although food security conditions are now easing in Burkina Faso, thanks to a good harvest, an October emergency food security assessment found that 1.8 million persons were food insecure in the country. The main drivers of vulnerability in Burkina Faso include fragile livelihoods, price volatility and the refugee influx from Mali. Millet price levels in Burkina Faso have eased from the highs reached in mid-2012, while remaining 30 to 40 percent above the five-year average in Ouagadougou and Dori. According to UNHCR, some 38,000 Malian refugees already live in northern Burkina Faso, stressing local resources in a highly arid environment. Additional refugee arrivals were reported since the resumption of hostilities in Mali in January.

According to the SMART survey conducted in September 2012 national GAM rate is 10.9 percent; and 32.9 percent of children under five are stunted. In addition to the high level of stunting, Burkina Faso level of underweight is also high, at 24 percent.

CHAD: The November 2012 crop assessment estimates that the 2012/2013 cereal harvest will be 86 percent above average. Although an aggregate surplus of 1.8m tons is forecast, grain deficits are registered in the regions of Kanem, Barh el Ghazal, Mayo Kebbi Est, Longone Occidental and Orientale, and Moyen Chari. Areas at risk of food insecurity are located in the Sahelian belt (Kanem, Bahr El Ghazal, Guera, Batha, Ouaddai, Sila and Wadi Fira) and in the flood-affected areas of the south (Mayo Kebbi Est and Ouest, Mandoul, Moyen Chari, Tandjilé, Longone Occidental and Orientale).

Presently, markets throughout the country are well supplied with basic food stuffs; cereal prices are experiencing a seasonal decrease. In the Sahelian belt, the price of millet in December 2012 dropped (-3.9 percent) from November, while in the Sudanian belt sorghum prices remain stable (-0.6percent). Generally, prices are lower than December 2011 while remaining above the five-year average. Grain prices in the Sudanian belt are expected to continue to decrease with the harvesting of off-season crops until March 2013. In spite of the bumper harvest, vulnerable households are expected to remain highly dependent on markets during 2013 lean season, considering the effects of the 2011 drought and 2012 floods on indebtedness and household assets.

CÔTE D'IVOIRE: According to the IPC results for December 2012, three departments of the western region (Toulepleu, Bloléquin and Taï) are in the crisis (IPC phase 3) while the areas in the North Central and south are in the minimal phase (IPC 1). The rest of the country is stressed (IPC 2). According to the December IPC, around 2.3 million people are food insecure, including 385,000 people who are severely food insecure.

A November assessment in the West indicated that food security remains a concern in areas bordering Liberia. Around 230,000 people – 16 percent of the area's population – are food insecure. In the West, insecurity, displacement and land conflicts are the main drivers of food insecurity. WFP conducted in November 2012 in the district of Savanes (North), indicated that 40 percent of the beneficiaries continue to have a poor or borderline food consumption score, due to the low food stocks and high food prices. To cope with this situation, many households seek casual labor opportunities, in more extreme cases households sell assets and land.

Despite the generally good harvest prospects for 2013, the food security situation will continue to be a concern for certain groups. In the West, the returnees who missed the planting season, and IDPs and host communities who found their land occupied will still be in need of food assistance until the next harvest period in mid-2013. In the North, small farmers will continue facing important constraints in food access due to the lack of agricultural inputs during the previous agricultural season and low food stocks, a concern as food prices will increase later in the year.

GUINEA: Preliminary results of a joint food and crop assessment conducted in October 2012 indicate that favorable agro-climatic conditions will lead to improvements in the country's agricultural production for the 2012/2013 agricultural season. Although the rainy season was good over all regions of the country, some northern areas received above-normal rainfall, causing flooding in some areas along the Niger River, which affected crops.

Thanks to good input supply, 2012 food production is projected to increase (+6 percent for cereals, +5 percent for tubers and +1.5 percent for groundnuts). In order to support food access for the poorest households, the government has for the past two years imported rice that is resold at a subsidized price. Improved domestic production is expected to diminish the commercial rice import requirements for 2013 are expected to decrease to 200,000 tons of rice. According to the crop assessment, there is good availability of various food products on the market. The prevalence of global acute malnutrition was estimated at 5 percent nationally according to the 2012 SMART survey.

GUINEA-BISSAU: Thanks to favourable climatic conditions, increases in area planted and increased diversification, the 2012-2013 crop is expected to be above-average. Some localized flooding of mangrove rice paddies took place. Generally, animal body conditions are good, and there is abundant availability of drinking water and fodder. Livestock prices are similar to last year. Although food prices remained stable in Bissau over the fourth quarter of 2012, they remain above their levels a year earlier. The populations that have suffered from recent flooding, increasing food prices and the poor performance of the 2012 cashew season may be at risk of declining food access over the coming months

LIBERIA: The number of chronically food insecure people in Liberia remains at usual levels, due to limited economic opportunities. Although areas in south eastern parts of the country remain food insecure, the presence of Ivorian refugees in those areas has brought some benefits in terms of agricultural knowledge, leading to a slight increase in area cultivated for agriculture.

The 2012-2013 crop for rice and cassava – Liberia's the two main staples - slightly improved compared to the previous year. The main harvest, along with stable supply of imported rice will cover the needs for staple food of Liberians. The government has extended the suspension of import tariffs on import of rice to rein in prices of the staple. These factors have led to a slight drop (10 percent) in retail rice prices in local markets. With the start of the dry season, physical access to markets is expected to be easier thanks to the availability of transportation.

MAURITANIA: Although favorable conditions during the 2012 rainy season led to a recovery in grain production and pastoral conditions, Mauritania will remain dependent on international imports for the bulk of its grain supply in 2013.

Since 2012, Malian refugees have been present in the remote southeastern region of Hodh Echargui. According to WFP monitoring, 25.8 percent of refugee households were food insecure. According to a survey carried out in M'bera camp in November, MSF estimates that GAM and SAM rates in the camp are critical, exceeding 17 percent and 4.6 percent respectively, underscoring the precariousness of refugees' living conditions. Gross mortality and under 5 mortality were respectively 0.76/10,000/day and 1.46/10,000/day, above the emergency thresholds of 0.5/10,000 day and 1/10,000/day, respectively. Poor access to water and hygiene conditions are the main drivers of global acute malnutrition in the camps. Since the resumption of military operations in Mali, more refugees have arrived in Fassala, adding to the caseload of 54,100 already in place.

NIGER: According to estimates from the National Mechanism for Prevention and Management of Disasters and Food Crises, in 2013 about 3 million people will be affected by the effects of recent crises and will need assistance to protect and rebuild their livelihoods. Among them, about 800,000 people affected by different shocks in 2012 and 2013, need immediate food and non-food assistance.

In spite of good agricultural and pastoral conditions in 2012 – with cereal production 22 percent above average and good grazing and drinking water availability - parts of the regions of Tillaberi, Dosso and Tahoua deserve special attention due to the impact of floods, water stress and pests on production. Recurrent food crises in recent years (2005, 2010, and 2012) have undermined livelihoods in Niger.

Although coarse grain prices experienced seasonal decreases with the harvest, increases have since been observed for millet and sorghum. In December 2012, nominal coarse grains prices are above last year's levels. The high price of millet and sorghum is due to low domestic supply, high demand from traders and drastic reduction of imports from Nigeria.

The situation is expected to remain stable over the next three months. However the current and projected level of prices of staple cereals on the markets will progressively undermine the purchasing power of the poorest households. These seasonal trends might be exacerbated by the ongoing conflict in Mali, which could disrupt trade flows in the regions of Tahoua and Tillaberi and create new refugees influx from Mali and more pressure on limited local resources.

SENEGAL: A December 2012 food security survey indicates that some 137,000 people in the regions of Saint Louis, Louga, Tamba, Matam, Kolda, Sédhiou and Kaffrine have not recovered from the successive shocks in 2011-2012 and remain vulnerable to food insecurity. In assessed areas, 45 percent of households are food insecure. Food stocks are almost depleted and cash availability is too low to cope with daily food expenses. Impacts are most evident for households interviewed in the departments of Bakel (Tambacounda region), Kanel (Matam region), Matam, Medina Yoro Foulah (Kolda region) where food insecurity rates exceed 60 percent. Food insecure households are commonly consuming less preferred foods more frequently. Other frequent coping strategies include decreasing the number of meals per day and quantities of food per meal, increased sales of livestock, incurring new debt and increase of seasonal migration. Coping levels in affected areas are above baseline levels.

High food prices are further driving food insecurity in surveyed areas. In December 2012 national average prices were above the five year average for millet (+20 percent), maize (+14 percent), cowpeas (+33 percent) and shelled groundnuts (+22 percent) while imported rice prices remained stable. In the coming months the food security and nutritional situation is likely to deteriorate in the areas identified at risk as household food stocks decline and food prices increase.

SOUTHERN AFRICA

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

MOZAMBIQUE: The January floods in Limpopo, Incomati and Inhanombe river basins, are currently affecting the population and particularly farmers in 11 districts in Gaza, Maputo and Inhambane provinces. The total population of the flooded areas is estimated to be 350,000 people. Extensive damage to crops has been noted in the flood-affected area, especially maize, rice, beans, tomatoes and other vegetables. As of late January there were about 150,000 people displaced in accommodation centers. The total number of affected people is expected to increase once road access improves, considering that part of currently isolated people have crops in the flood-affected lowlands.

Immediate response is in place and a multi-sectoral Emergency Food Security Assessment (EFSA) is planned for mid-February. Before the floods started in January, more than 255,000 people were estimated to be food insecure (IPC phases 2 "Stressed" and 3 "Crisis") in 23 central and southern arid and semi-arid districts, following a prolonged drought period, out of which 21,000 are from the currently flooded districts of Gaza.

Because of heavy rain and floods, roads are cut off and are already affecting the flow of food products from production areas to consumer centers. Consequently, the products will be reduced and unavailable and their prices are expected to increase in following weeks. Prior to the flooding, staple food prices levels were already above the previous year in all markets. In January, year-on-year increases exceeding 50 percent were observed in several markets in Central and Northern provinces.

MALAWI: Malawi Vulnerability Assessment Committee released an update report in November confirming that the number of food insecure people in the country for the current season is around 1,975,000. Households already receiving assistance are expected to be stressed (IPC Phase 2) until March, when the harvest period will start. However, households that have yet to receive assistance are in crisis (IPC Phase 3). Following a devaluation of currency in May 2012 and further depreciation, the country has experienced a steady increase in the prices of food commodities. Fuel shortages and lack of foreign currency in the country have further caused an increase in the prices of basic commodities. Poor economic access to food is primarily a result of high food prices, coupled with decreased purchasing power.

Weather forecast anticipates average to above average rainfall for the remainder of the season, which will continue supporting on-farm agricultural activities, growth and development of crops in most part of the countries. Food prices are expected to decrease slightly as the harvest peaks in high producing area at the end of February.

LESOTHO: The preliminary results of the Community and Household Surveillance (November 2012) indicated that food consumption and coping strategies for many households have deteriorated compared to the previous year. As the lean season peaks, the majority of households no longer have food stock and they rely more on purchases, while also relying to a greater extent on unreliable income sources, such as casual labour and brewing. Above-average levels of food insecurity in Lesotho are driven by two consecutive years of poor crop production, leaving 725,000 people food insecure. The government has subsidized farm inputs and also engaged in sharecropping with farmers as a strategy to increase production this year.

The situation is complicated by high prices of staple food: prices of maize meal showed an increase of 18 percent in November 2012 when compared to prices at the beginning of the year. As of January, petrol prices had increased by 10 percent year-on-year.

MADAGASCAR: The USAID/SALOH Early Warning System reported that food security conditions were deteriorating in October and November 2012 in most communities of the semi-arid and drought prone South. With the household revenue stressed by crop failure, high food prices and a decline in livestock prices, the population had to employ consumption coping strategies such as relying on less preferred and less expensive foods, adults skipping meals, limiting adult intake to prioritize children. In August WFP had estimated that 49 percent of households were food insecure in these areas. In the eastern and southeastern regions of the country, affected by Cyclone "Giovana" in February 2012, the USAID/SALOH Early Warning System indicates that most of the area was experiencing moderate food insecurity. Household food access is stressed by the high price of rice and its substitutes, and household stocks seldom exceed a few weeks. The most frequent coping strategies focus on reducing food diversity, cutting number of meals and lowering expenditure.

The food security outlook in the South, the East and the Southeast will hinge on the outcome of the early-crop harvest in January/February 2013. If the early-crop production harvest is good and no major cyclone occurred by mid-February 2013, the early harvest will improve household food access. However, should the forecast of normal to below normal rains in January/February 2013 hold, the situation will not improve in the food insecure areas. In general, as the rainy season progressively settles in, food prices are expected to remain high, though they will be decreasing slowly as the start of the main crop season harvest (mid-April) is approaching.

ZAMBIA:

The food security situation is fairly stable with people having increased the consumption of seasonal foods such as mangoes, mushrooms and green maize since December. However, an increase in maize price has been observed in the last quarter of 2012 (+20 percent from the previous quarter, +5 percent from the last quarter of 2011) due to dwindling supply and strong demand; prices are expected to remain high through March, with the main harvest beginning in April. So far, the situation has been contained by the government through the release of subsidized maize from the strategic reserves to the millers.

During the next three months the food security situation is expected to be fairly stable with continued availability of staple food on the markets. The prospects of 2012/13 production are favourable as most cereal crops in most parts of the country have reached advanced vegetative stage. No major reports on army worm infestation have been received apart from isolated reports in the northern parts of the country and the situation has fully been contained by the Ministry of Agriculture and Livestock.

ZIMBABWE: Rural food insecurity in Zimbabwe will peak at 19.1 percent (about 1.67 million people) between January and March 2013 (IPC Phases 2 'stressed' & 3 'crisis' from February 2013). The situation will however be cushioned by food assistance activities to about 1.6 million people. Main drivers of food insecurity are the poor 2011-12 poor agricultural season, high food prices, and depressed incomes from livestock and casual labour.

The food security outlook for February to April 2013 points to an easing of the situation as food assistance activities peak. Cereal prices are expected to start stabilizing from March/April as early harvests start. Cereal production is likely to be affected by low cropped area due to late start and poor rains in some areas, fertilizer high prices and shortages, army worm attacks and floods across parts of the country. Livestock prices are expected to improve as pastures improve.

MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

FOCUS: Syria, Jordan, Lebanon, Iraq, Turkey, Egypt, State of Palestine, Sudan, Yemen, Tajikistan, Kyrgyz Republic

SYRIA: In mid-January, the Syrian Arab Red Crescent released updated figures of the civil-unrest affected population in Syria. According to their report, over 4 million people have requested assistance. As of 10 February, it is estimated that about 3 million are internally displaced, more than 664,000 have been registered as refugees in neighboring countries and more than 144,000 are awaiting registration. In recent weeks, fighting has intensified across Syria leading to displacements and cross-border movements.

FAO estimates that in 2012, cereal, fruit and vegetable production has dropped by half compared to an average year due to insecurity, destruction of irrigation infrastructure and lack of fuel. From an average of 4 to 4.5 million tons, cereal harvest this year is estimated at 1.8 million tons. Wheat flour and bread prices have increased sharply during the last quarter of 2012. According to WFP price monitoring, the average monthly price of subsidized bread sold in shops increased by 77 percent in Aleppo and 56 percent in Qamishly. The steepest increases were observed during the month of December. The analysis of the follow-up Joint Rapid Food Security Needs Assessment by WFP, FAO and the Ministry of Agriculture and Agrarian Reform conducted in November 2012 to assess crisis impacts at household and community level is currently ongoing.

As the humanitarian situation in Syria continues to deteriorate, WFP has scaled up its food assistance in Syria and is planning to reach 2.5 million beneficiaries. In view of recently reported shortages of bread and fuel, WFP is exploring strategies for expanding bread availability in conflict stricken areas either through direct distribution of wheat flour to beneficiaries or through provision of yeast, fuel and possibly wheat flour to local bakeries.

JORDAN: The number of officially registered Syrian refugees has nearly tripled compared to October 2012 to 205,000 as of 12 February 2013. In addition, more than 48,000 are currently awaiting registration. Following increased unrest in Southern Syria, the country has received a record number of refugees in January, with more than 51,000 people arriving at Zaatari camp during January. The majority of refugees are families, female-headed households and elderly who arrived with no or little belongings. According to a joint UNICEF/WFP nutrition survey conducted in October/November 2012, 23 percent of Syrian refugees have poor or borderline food consumption.

It is estimated that currently more than 108,000 people are hosted in Zaatari camp. Snow storms and flooding during the harsh winter put an additional constraint and forced some of the refugees to leave their tents temporarily. The conditions and overcrowding led to the decision to open up a second camp with the capacity to host up to 30,000 people in the future.

Increasing number of refugees are registered in urban areas that are not equipped to meet the needs of the suddenly inflated population. There have also been reports that rents and other living costs have been pushed up while daily wage labour rates are going down putting additional strains on the most vulnerable populations groups.

LEBANON: The number of officially registered Syrian refugees has doubled compared to October 2012 and stands at 179,000 as of 11 February 2013. In addition, more than 95,000 are currently awaiting registration. Similar to Jordan, an increasing number of new arrivals have been observed in January. Not all of the new registered refugees are new arrivals, most of them are families or individuals who arrived some months ago but had resources to sustain themselves so far. Over time, they have depleted their assets and also job opportunities during the winter season are limited.

Shelter has become a major concern during the extreme winter conditions of this season. The Government has not officially approved the construction of refugee camps. Already existing Bedouin camps typically receive seasonal workers during the agricultural peak seasons. Some refugees decided to settle here due to such previously established economic relationships. According to UNHCR, many of the newly registered people are seasonal labourers who normally return to Syria during the winter months but could not make it this season.

Refugees are largely dependent on food and non-food assistance. In January, food and voucher distributions in some areas have been delayed due to poor weather conditions and snow fall. According to a joint UNICEF/WFP nutrition survey conducted in September 2012, 32 percent of Syrian refugees had poor or borderline food consumption and dietary diversity.

IRAQ: Overall, the food security situation in Iraq has slightly improved compared to five years ago according to a recent report by WFP and the Ministry of Planning (December 2012). The prevalence of food deprivation in Iraq fell from 7 percent in 2007 to 6 percent in 2011. There are now 1.9 million Iraqis suffering from food deprivation with the majority living in Basra, Baghdad and Thi Qar governorates. The prevalence of vulnerability to food deprivation also decreased during the same period from 20 to 14 percent. Despite these improvements, inequality in consumption has widened. Consumption of the highest income quintile is now 1.9 times higher compared to the lowest.

The Universal Public Distribution System plays a vital role in maintaining a low prevalence of food deprivation but it also has several constraints as it distorts domestic food markets and national resource allocations due to the lack of an adequate targeting mechanism. One of the top priorities of the government is therefore to transform the system and only target the most vulnerable people.

The number of registered Syrian refugees in Iraq has nearly doubled compared to October 2012 and the country is currently hosting more than 87,000 refugees according to latest UNHCR figures. Several borders with Syria have been closed over the past months to avoid spill-over effects. While livelihoods may have been impacted, market prices have remained fairly stable as import requirements could be met through other channels such as the Basra port, Jordan, Turkey and Iran.

TURKEY: The number of registered Syrian refugees inside Turkey has increased by more than 50 percent compared to October 2012 and stands at more than 177,000 as of 11 February 2013. It is estimated that 60,000 to 70,000 Syrian refugees live outside of official camps – mainly in urban areas. In addition, between 20,000 to 35,000 Syrian are at the border of Turkey awaiting admission into the country.

Most refugees are residing in government managed camps along the southern border to Syria and are heavily reliant on external assistance to meet their basic food needs. Food assistance is being provided mainly by the government of Turkey and the Turkish Red Crescent Society. WFP has implemented an e-voucher scheme that is currently reaching 22,500 beneficiaries with a target of 100,000 by the end of June 2013.

The strong integration of food commodity markets in Turkey means that there are no supply side constraints. Due to the support provided in camps and the open access of Syrians to these camps, the pressure on host communities has not been significant. Refugees living in private accommodation outside of official camps are considered to be better off and able to meet their basic food needs through their own assets and/or support provided by host families.

EGYPT: In recent months, Egypt has faced an economic slowdown due to political instability resulting in reduced purchasing power of vulnerable households. In December 2012, 83 percent of vulnerable households across Egypt are facing difficulties in covering their basic needs, a sizeable increase from 74 percent six months earlier according to the Government/WFP Egyptian Food Observatory. There has also been evidence of an increased use of negative coping strategies such as consumption of lower quality food, reduce quantity and number of meals, and buying food on credit.

Egypt is a net food importer and heavily dependent on food imports to meet the consumption needs of the population. The recent significant depreciation in the Egyptian pound and the low level of foreign reserves has therefore put the country at risk. A deal with the International Monetary Fund to stabilize the situation has been delayed due to current political crisis. It is expected that prices of basic commodities will increase during the first quarter of 2013 due to the depreciation and a possible enforcement of a new tax regime.

Towards the end of 2012 and in early 2013, Egypt has received an increasing number of Syrian refugees who are mainly located in the urban centres of Cairo, Alexandria and Damietta. So far about 16,000 people have been officially registered by UNHCR. Interagency needs assessments conducted in December and January concluded that the living conditions of most refugee families is below minimum standard and that they are unable to meet their basic food needs.

STATE OF PALESTINE: Palestinians continue to suffer from a lack of stability, economic opportunities and livelihoods, limited access to essential services and restrictions on movements of people and goods. High levels of food insecurity persist with about 27 percent of the total Palestinian population (1.3 million people) considered food insecure in 2012. Food insecurity rates in the Gaza Strip remain significantly higher than in the West Bank. The 2012/13 food security assessment is currently ongoing and results will be available in April.

There have been several events in the past few months with negative impact on the food security situation: First, a large snow storm in January left extensive damage throughout the Middle East region, hitting the West Bank of the State of Palestine particularly hard, affecting 40 communities, displacing thousands of people and damaging the winter crop; second, the Palestinian Authority became insolvent and was unable to fully pay civil servant wages in November and December leading to major strikes; and third, the most recent Israeli offensive on Gaza Strip in November caused damages to housing and the displacement of 15,000 people. A rapid food security assessment showed that hostilities did not have major long term impacts on food security.

SUDAN: Around 3.6 million people will require food assistance in 2013 according to the Humanitarian Work Plan, 600,000 less compared to the previous year. The decrease was mainly due to the verification exercise of IDPs in camps as well as good harvest prospects in rural communities that previously benefitted from seasonal support.

Despite the good harvest prospects, local cereal prices remain high when compared to the same time last year. Reasons include high costs of agricultural inputs, delays in harvest due to labor shortages and insecurity problems in two sorghum-surplus regions (Blue Nile and South Kordofan). Livestock prices are also high due to good grazing conditions and high demand for livestock exports.

Most of the food security problems in Sudan in the coming months are related to food access as a result of continued displacement by IDPs as well as lack of income opportunities. Conflicts along the border with South Sudan and political instability in the Darfur region will continue to be the main causes of household food insecurity. An escalation of security incidents and increased conflict in parts of North Darfur has recently been reported, and an estimated number of 150,000 people have been displaced so far.

YEMEN: Yemen is highly vulnerable to food insecurity and according to the FSMS conducted in December 2012, nearly 52 percent of the population in the 11 governorates covered had poor or borderline food consumption. While in 2010, only 16.5 percent of households had poor food consumption, towards the end of 2011 during the peak of the social and political unrest, the figure reached 31 percent and slightly declined but still remained at high level up to today with 27 percent. Household continue to apply negative coping strategies and increasingly rely on credit to access food.

The main drivers of food insecurity in the country continue to be internal conflicts and insecurity in various parts of the country and limited access to sustainable livelihood opportunities combined with high costs to access food and other basic commodities. Although wheat prices have increased by 7 percent between the third and fourth quarter in 2012, they have decreased by 17 percent year-on-year.

Some 50 percent of the people who fled fighting following the May-June 2012 military offensive in Abyan governorate have reportedly returned back to their places of origin during the last quarter of 2012. Those who have returned are confronted by lack of basic services and security, the destruction of houses and other assets and the disruptions of livelihoods. Nevertheless, there are still about half a million people that are internally displaced, among which 75 percent are from the North and the remaining from the South corridor.

TAJIKISTAN: High food prices driven by high import prices due to harvest failures in Kazakhstan and high fuel costs remain the main food security concern. Price of wheat flour increased by 26 percent in November compared to the same time last year and fuel prices remain as high as in 2011, when they reached record levels.

Despite increasing food prices, the food security situation has slightly improved compared to previous years. Impacts have been mitigated through remittances and a generally favorable agricultural season in Tajikistan. Some 22 percent of households interviewed during the November 2012 food security monitoring round were food insecure and 15 percent had poor or borderline food consumption. Most households continued to rely on coping strategies and spent two-thirds of their expenses on food.

The food security is likely to deteriorate in the next months, particularly in remote areas, as more households become reliant on food purchases during the winter and early spring season. Poor households with no access to own production and remittances are particularly vulnerable due to high market prices.

KYRGYZ REPUBLIC: A WFP food security assessment conducted in September 2012 concluded that 25 percent of households (about 1.3 million people) were food insecure. The situation deteriorated compared to August 2011, when 18 percent were considered food insecure. Deterioration was also observed for food consumption with 17 percent considered to have poor or borderline food consumption, compared to 6 percent during the previous year. Nearly 13 percent of food secure households used negative coping strategies for accessing food, for example relying on less preferred and less expensive foods and reducing the number of meals eaten in a day, or limiting portion sizes. Food secure households applying coping strategies are considered to be at risk of becoming food insecure in the future.

Sharp increases in retail wheat flour prices during June-December 2012 (51 percent), higher regional wheat import prices and a reduced domestic wheat harvests are the main drivers for food insecurity in the Kyrgyz Republic. Increasing expenditures on gas, coal and firewood are expected to put further pressure on food insecure and vulnerable households during the winter season lasting until March.

ASIA

FOCUS: Philippines, Pakistan, Sri Lanka, Afghanistan, Bangladesh, Cambodia, DPRK, India, Lao PDR, Myanmar, Nepal

PHILIPPINES: Due to the adverse effects of Typhoons Bopha and Wukong in December 2012, over 6.2 million people have been affected in 10 regions of the country. Some 973,207 people were displaced by Typhoon Bopha. Results of the IPC analysis in November 2012, prior to the typhoon impacts, indicate that the food security situation in the worst hit provinces (Compostela Valley, Agusan del Sur, Davao Oriental and Surigao del Sur) were already stressed (IPC Phase 2) and crisis (IPC Phase 3).

Although total rice production for 2012 is estimated at 17.8m tons, a level 6.5 percent above the previous year, it falls short of targets for rice self-sufficiency. Prices of food and other basic commodities remain within normal ranges.

PAKISTAN: Of the 5 million people affected by floods in September 2012, 1.2 million were facing severe food insecurity, according to the Multi-sectoral Initial Rapid Assessment and WFP's Initial Vulnerability Assessment. Findings from the recently-concluded detailed food security assessment reveal that food was the most important immediate need for 70 percent of households in flood-affected areas.

At the national level, a continuing trend to increasing food prices is hampering poor populations' food access. The prices of main staple cereals have reached an all-time high; the prices of wheat and wheat flour in December 2012 were 12 and 10 percent higher compared to June. The wage-to-wheat terms of trade have deteriorated as wheat prices have increased and wage rates have remained almost stagnant.

The food security situation of the poor is likely to deteriorate further in the next months, as food prices are expected to continue rising. The next main harvest of wheat, Pakistan's main staple, is expected in April; food prices will therefore rise during this lean period. Furthermore, the government has increased the wheat support price from PKR 1,050 to PKR 1,250 per kg in November, making short-term price rises likely during the lean season.

SRI LANKA: Torrential rains that started in early December 2012 resulted floods and landslides in eighteen out of twenty five districts in the country, affecting more than 557,983 people and causing damage to 2012/2013 maha crops. Drought conditions between June and September 2012 had already affected more than 1.3m people in the same districts during the 2012 yala cropping season. Drought and flood-affected areas have experienced back-to-back harvest losses.

According to a January 2013 rapid food security assessment in the ten worst flood-affected areas, food consumption levels of the affected populations have deteriorated when compared to the time of drought in the beginning of September 2012. Some 33 percent of flood-affected households (184,100 persons) have fallen into the severely food insecure group. Currently, 40 percent of flood-affected households are coping by skipping meals and limiting meal portions, eating less preferred food, pawning assets and borrowing money. Since a large number of surveyed households have missed consecutive harvests due to the recent drought and floods, food security conditions of flood affected people are not expected to improve until the next harvest in September 2013.

Further, food security monitoring has been tracking the chronic food insecure returnees in the Northern Province of Sri Lanka. As per the latest food security assessment findings, 514,410 persons in the Northern Province are food insecure.

AFGHANISTAN: Although the monthly average price of wheat in main urban markets generally remained stable in November, a 6 percent increase occurred in Jalalabad due to increased price of imported supplies. The average price of wheat in December was 6 percent higher than in December 2011. On average, labour to wheat terms of trade deteriorated by 2.7 percent from November to December 2012 due to increased wheat price and lower labour wage rates.

The food security situation is expected to remain generally stable until February 2013. Thanks to an increase in cereal production, wheat stocks are adequate and the cereal deficit, estimated at 442,000 tons, is reduced. Improved pasture conditions are expected to lead to a 5 percent increase in livestock products. However, cold winter weather in some locations and the continuous increased price of wheat and wheat flour since mid-2012 may affect the food access of chronically food insecure households in remote areas.

BANGLADESH: Although food inflation continues to follow an upward trend, the average wholesale and retail prices of rice remained stable over the past months thanks to a good harvest and sufficient public stocks. According to WFP data, male agricultural laborers' purchasing capacity in the vulnerable northwest region and southern region of Bangladesh was 10.5 kg rice per day in December. This was 20 percent higher than a year ago, thanks to the lower price of rice. Wage laborer's terms of trade usually increase from November to mid-January, when planting of Boro paddy and wheat and harvesting of Aman paddy coincide. Aman rice production for 2012/13 was affected by flash floods in the northwest region, which occurred in September 2012 during cultivation. These floods caused additional hardship to vulnerable sections of the population, such as agricultural day laborers and small and marginal farmers.

CAMBODIA: In spite of localized flooding and drought events, the total wet season rice harvest in 2012 was 8.3 percent higher than in 2011, according to the Ministry of Agriculture, Forestry and Fisheries. After rising in October due to the lean season, the price of low-quality rice decreased by 6 percent in rural areas and 1 percent in urban areas in December. On a year-on-year basis, in December, the food and fuel components of the Consumer Price Index increased by 2.5 percent and 3.8 percent, respectively. The food purchasing power of vulnerable households in both rural and urban areas improved in December 2012 thanks to the decrease in rice prices. The food security situation will remain stable or improve until March due to the completion of the wet and dry season rice harvests. Food prices are expected to remain stable or slightly decrease this quarter, improving the purchasing power of vulnerable households.

DPRK: According to the Crop and Food Security Assessment Mission (October 2012) cereal production increased for the second consecutive year with 4.9m ton harvest. The cereal deficit was estimated at 507,000 mt out of which 207,000 mt are uncovered with commercial or bilateral imports. Preliminary findings of the October 2012 National Nutrition Survey found that while the prevalence of child chronic malnutrition improved modestly (from 32.4 percent in 2009 to 27.9 percent in 2012) the situation remains "poor" to "serious", with reference to WHO standards. Acute malnutrition dropped from 5.2 percent to 4.0 percent, indicating an acceptable situation.

Cereal rations provided by the government through the Public Distribution System were at the highest level in the past four years during the last quarter of 2012, increasing from 310 grams/person/day in September 2012 to 400 grams/person/day during the last quarter of 2012. The food security situation is expected to remain stable during the first quarter of 2013.

INDIA: The first projection of the kharif (monsoon) crop, cultivated during October 2012 to January 2013, suggests that the cereal production is about five percent lower than the previous year. Despite the projected decline, production will be sufficient to meet the domestic and export requirements, thanks to ample stocks. Cumulative Post-Monsoon Rainfall for the country as a whole during the period 1st October to 31st December, 2012 is 21 percent less than average. In particular North West India might continue to experience drought during the current cropping year.

In spite of good production levels, food inflation is a concern. Among cereals, the rate of increase in the price of wheat has risen to 23.2 percent in November-December from 19.8 percent in October, cereals to 15.8 percent from 14.3 percent, rice to 11.8 percent from 11.4 percent. Cereal prices are expected to stay high despite good production forecasts. Since poor households spend approximately 70 percent of their household income on food, food inflation has significant implications on their food security. Although India's large network of food based safety nets usually cushions the impact of high food prices on the poor, the most vulnerable populations, especially in the chronic drought prone areas face severe food insecurity, often migrating in search of employment and food. According to FAO, a fifth of the population, some 217 million people, are food insecure.

LAO PDR: The main harvest began in November 2012. According to the Ministry of Agriculture and Forestry, the country produced a total of 3.4m tons of rice, the main staple crop. This amounts to 540kg/per capita which is well above the 350kg/capita requirement. Dry season cultivation of irrigated rice and other crops like maize and vegetable commence after the rainy season. In spite of good food availability, increasing inflation poses a threat to food security. According to the Lao Statistics Bureau, food inflation rose to 7.2 percent in December 2012, up sharply from 3.8 percent in October. The rise in inflation is attributable to the increase in some food prices, namely beef, and a slight increase in the price of vegetables and fruits. The price increase is caused by a limited supply in local markets, as producers increasingly export products to neighboring countries.

MYANMAR: Rains were sufficient in most of the country for a successful monsoon harvest, leading to an observed reduction in the prevalence of household food insecurity (from 38 percent in August to 29 percent in December) in monitored areas. Insufficient or irregular rains were a problem in certain areas, with harvests in parts of Chin state and the Dry Zone most impacted. In Chin State, up to 100 villages in western part of the state are reporting substantial crop losses, with the worst affected villages likely to run out of food stocks as early as January or early February. In the Dry Zone, lower than normal precipitation at key planting and harvesting periods in the monsoon season has significantly impacted paddy, pigeon pea, sesame and groundnut harvests. The extent of loss is being assessed, but it is likely that impacts will worsen with the move into the traditional summer period and 2013 monsoon season.

The food security situation remains a concern in both Kachin and Rakhine states, as conflict and communal violence continue to impact livelihoods. In Kachin, over 70,000 people remain displaced, with roughly half of the IDPs still inaccessible to the international community. In Rakhine, livelihoods of both Rakhine Buddhists and Rohingya Muslims continue to be impacted by tensions between communities. Violence in June and October 2012 has resulted in over 100,000 registered IDPs alongside an unknown number of unregistered IDPs. A recent WFP assessment found significant needs among host communities as well as IDPs and a Save the Children assessment found malnutrition rates in the camps bordering on emergency thresholds.

NEPAL: The food security situation has improved across the country, due to the recent summer crop harvest that took place in October - December. Exceptions are found in pocket areas in the Mid-Western Hill districts, where the IPC Phase 2 (stressed) is reported, where a late start of the monsoon, strong winds and pest infestation affected the summer crop. These areas are remote and the population has limited access to other livelihood options such as sales of cash crop/livestock products and non-timber forest products. Wage labor opportunities from development activities are also limited due to the partial release of the government budget. The population is coping with the situation by migrating to India or neighboring districts.

The food security outlook from January onwards does not look promising especially in the areas where poor/very poor summer crop production is reported. A late and weak start of the monsoon during the 2012/13 agricultural year has affected the paddy plantation timing as well as the total area planted, resulting in a decline in production and a low yield especially in parts of the eastern Terai. According to the latest production estimates released by the Ministry of Agricultural Development, the 2012/13 summer crop production of paddy, maize and millet have declined by 11.3 percent, 8.3 percent and 3 percent respectively compared to last year.

LATIN AMERICA AND CARIBBEAN

FOCUS: Haiti, Guatemala, Bolivia, El Salvador, Honduras, Nicaragua, Peru

HAITI: Due to a series of severe shocks - drought, tropical storms Isaac and Sandy, the food security situation has sharply deteriorated during the second half of 2012. According to the National Committee on Food Security, 6.7 million people are estimated to live in food insecurity, the highest level recorded in a decade; out of these, as much as 1.5 million face severe food insecurity, whereas 0.8 million were severely food insecure in 2011. The impact of various shocks which culminated with Sandy in October 2012, led the Government of Haiti to temporarily declare a state of emergency in November and December 2012. Critical crop losses have severely reduced income opportunities for the rural population. Food stocks are at their lowest in affected communes and work opportunities in rural areas have severely contracted. Moderate food prices increases are noted in the last quarter of 2012. Imported rice price increased by 3 percent compared to last year, 5 percent from previous quarter. There is a risk of maize prices remaining high until next harvest in July, whereas imported rice price will probably remain more stable.

Affected households have engaged in negative coping strategies: reduction of the number and the quality of meals; increases in tree felling for charcoal production; increased migration to urban centers and Dominican Republic and increases in under-aged domestic work. Emergency response targeting the most vulnerable affected households is required during the lean season from January to June 2013. The earliest prospect for improvement lies with the next harvest in mid-2013. Food prices are expected to remain high during the forecasted period. The Emergency Food Security Assessment (EFSA) of December 2012 indicates that the nutritional status of children under 5 has slightly deteriorated, still remaining within acceptable threshold. The prevalence of acute malnutrition (based on MUAC) was at 4.8 percent compared to 2.6 percent in April 2012 (SMART survey).

GUATEMALA: In November, an earthquake of magnitude of 7.2, the country's strongest in 36 years, left thousands of people without homes, electricity or water; destroyed schools, and caused US\$ 210 million in damage. The Government declared a state of calamity in eight provinces in the northern and southwestern regions of the country. Many of the affected areas have a high percentage of indigenous population and are characterized by high poverty rates and high prevalence of chronic malnutrition. According to FEWSNET, affected municipalities are facing stressed conditions (IPC phase 2), since affected households will use unsustainable coping strategies to address food and/or recovery problems.

Previously, a severe dry-spell occurred between June and September affecting the first harvest cycle (primera). The phenomenon affected 14 departments within and outside the Dry Corridor. At least 10 of them were severely affected and households in these departments are at risk of deteriorating food security and increasing acute malnutrition rates due to significant crop losses (mainly maize, and to some extent beans), representing their main food intake base. The two shocks have increased household vulnerability to food insecurity. Preliminary results from the December 2012 Emergency Food Security Assessment carried out in response to the drought, indicates that food insecurity prevalence rates are as high as 64 percent in the Dry corridor. Households in the livelihoods zones of subsistence agriculture and basic grains are the most affected. In the coming months, the risk of food insecurity will likely increase in the 14 Departments affected by the drought, where household food stocks are minimal.

BOLIVIA: In December 2012 localized flooding affected San Julián, a small region in the Department of Santa Cruz, prompting WFP to provide assistance to 1,500 affected people. No significant price fluctuations occurred during this period. During the fourth quarter, the food Consumer Price Index variation was 1.97 percent, while the general CPI was 1.38 percent. The last quarter of each year is the main sowing season in Bolivia. During this period, most of the main cereals, both cash and subsistence crops, are planted throughout the country. The food security, particularly of the most vulnerable, depends on the harvest of these crops. Rainfall patterns during this period and the first quarter of 2013 will determine the harvest as well as household level food availability prospects. As of this period, rainfalls in most of the country were close to normal. Rainfall levels peak during the first quarter of the year, when flooding can occur.

EL SALVADOR: Food security conditions remained stable in the last quarter. The maize crop exceeded projections by 25 percent. As for beans, the 2012 harvest also produced a surplus of 600 thousand quintals. Based on the above figures, food security forecast can be deemed as stable for the next three months. As of December 2012, WFP provided general food distributions to vulnerable populations in three municipalities affected by the July 2012 prolonged drought. WFP is assessing if in early 2013 additional assistance is necessary. From November 2012 to early January 2013, macroeconomic indicators reflect stable conditions. Fuel, food basket and staple grains prices remain unchanged for the last two months. Prices of staple grains are anticipated to decrease due to the high volume of grains imported in December. Weather conditions are favorable for farming.

HONDURAS: In Honduras, the average rainfall during the second agricultural cycle (Postrera 2012) was better than anticipated at the start of the season (October 2012). The total cumulative rainfall was slightly above average for most of the country, however, below-average for crop development in the surplus-producing areas, central and northern regions, particularly Olancho where overall production prospects was decreased.

The demand for unskilled labor was expected to increase above average due coffee harvests. However, the international price has fallen significantly compared to last year (about 30-35 percent) but there is a tendency to price stabilization.

Additionally to the decrease on coffee international prices, coffee production will decrease since 25 percent (70,000 hectares) of the planting area (280,000 hectares) is being affected by a fungus disease (Hemileia vastatrix). This disease is expected to cause economic losses of approximately US\$200 million, and the loss of 100,000 jobs. As a result, the Honduran government (Ministry Council) has declared a national emergency for the country.

Acute food insecurity in Honduras is likely to remain minimal (IPC phase1) until March 2013, however, it could increase for some regions and livelihood, dry corridor and coffee areas, mainly during the lean season (April-July).

NICARAGUA: The postrera season that takes place from September to December 2012 had good results for both domestic consumption and for export. Increased production will maintain food availability in national markets and favor price stability for staples.

In December, the cash crop harvest season (coffee, sesame, sugar cane, tobacco and peanuts); the third planting season (Apante) for beans in central-north and Atlantic-north region and, irrigated rice in the northwest and pacific regions began. However, coffee rust is affecting at least 20 percent of coffee plantation nationwide. FEWSNET reported that the demand for labor during coffee harvest season has not decreased and demand for maintenance work (related to treatment of rust) will be above average from this date until March / April 2013.

Food prices remained stable during December 2012; however food access remains the main food security problem for low-income families in Nicaragua. According to Fideg, 44.1 percent of the population lives in poverty and 8.2 percent live in extreme poverty. Rural families living on agricultural minimum wage can just cover 21 percent of cost of the basic food basket. The food security situation is expected to remain stable during the first three months of 2013; the lean season will begin as normal in April. Basic food prices are expected to remain stable.

PERU: In the Andean Highlands and the Amazon basin, the rain season began in November 2012, marking the start of the December-April annual rainy season. Heavy on-going rains caused landslides and floods, damaging up-coming crop harvest and leaving 6,400 farmers' families at risk of becoming food insecure. In 2012, the overall food prices in Peru increased by four percent, while the inflation rate rose by 2.6 percent. Price increases were experienced for tuber, pulses and meat. Recent food price increases on the international market for maize, wheat and soybean products have so far no impact on local markets.

The National Institute for Hydrology and Meteorology forecasts that intense rainfalls will continue in the Andean Highlands, as well as in the Amazon basin.



Acronyms

CFSAM	Comprehensive Food Security and Vulnerability Analysis	MICS	Multiple indicator cluster survey
CFSVA	Comprehensive Food Security and Vulnerability Analysis	MFEWS	The Mesoamerican Food Security Early Warning System
CNIGS	Centre National de l'Information Géo-Spatiale, Haiti	MSF	Médecins Sans Frontières
CNSA	National Committee for Food Security in Haiti	MVAC	Malawi Vulnerability Assessment Committee
CPI	Consumer Price Index	OCHA	United Nations Office for the Coordination of Humanitarian Affairs
DRC	Democratic Republic of the Congo	PAHO/WHO	Pan American Health Organization, Regional office of the World Health Organisation
DPRK	Democratic People's Republic of Korea	PRONANUT	Ministry of Health National Nutrition Department, Democratic Republic of Congo
EFSA	Emergency Food Security Assessment	SAM	Severe Acute Malnutrition
EMOP	Emergency Operation (WFP)	SEFSec	Socio-Economic and Food Security survey, State of Palestine
FAO	Food and Agriculture Organization of the United Nations	SENAMHI	National Institute for Hydrology and Meteorology, Peru
FEWSNET	Famine Early-Warning Systems Network	SMART	Standardized Monitoring and Assessment of Relief and Transitions
FIDEG	Fundación Internacional para el Desafío Económico, Nicaragua	UNHCR	United Nations High Commissioner for Refugees
FSMS	Food Security Monitoring System	USAID/SALOHI	United States Agency for International Development Strengthening and Accessing Livelihood Opportunities for Household Impact
FNSMS	Food and Nutrition Security Monitoring System	VAM	Vulnerability Analysis and Mapping
FSNWG	Food Security and Nutrition Working Group	WFP	World Food Programme
GAM	Global Acute Malnutrition	WHO	World Health Organization
GDP	Gross domestic product		
IDP	Internally displaced person		
IMF	International Monetary Fund		
INDECI	National Institute of Civil Defence, Peru		
IPC	Integrated Food Security Phase Classification		

Information sources

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FEWS-NET: www.fews.net
FSNAU: <http://www.fsnau.org/>
FSNWG: <http://www.disasterriskreduction.net/fsnwg>

IPC: <http://www.ipcinfo.org/>
OCHA: <http://www.unocha.org/>
UNHCR: www.unhcr.org
WFP: <http://www.wfp.org/food-security>
WHO: <http://www.who.int>

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Spain supports the preparation of the Global Update.



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