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Global Food Security Update

TRACKING FOOD SECURITY TRENDS IN VULNERABLE COUNTRIES

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

Fighting Hunger Worldwide

In focus

- Due to conflict, 'Emergency' (IPC phase 4) levels of food insecurity exists in local areas of **South Sudan**, Eastern **Democratic Republic of Congo**, South and West **Yemen** and northern **Mali**. 'Crisis' (IPC phase 3) conditions prevail in parts of **Ethiopia, Djibouti and Somalia**. The after effects of shocks and instability in Nigeria are contributing to 'Crisis' or 'Stressed' food security outcomes that will last through the June-September lean season in agro-pastoral zones of the **Sahel**. Due to shocks in 2012 and delayed rains, 'Stressed' (IPC phase2) food insecurity persists in most of **Haiti**.
- The May-June FAO-WFP **Syria** Crop and Food Security Assessment Mission (CFSAM) estimates that 4 million Syrians are food insecure. Lack of income, high prices and increasing shortages are limiting Syrian household's ability to access basic staples.
- As a result of poor rains in parts of **Southern Africa**, tradable staple food supplies in the region are limited while maize prices are above-average. According to national VAC assessments, some 1.4 million people are at risk of food insecurity in Malawi, May-June 2013 VAC assessments have shown that the food insecure population in **Namibia, Swaziland, Zambia** and **Zimbabwe** is above the 5 year average. In **Namibia**, a May WFP assessment showed evidence of high household coping in drought-affected areas.
- Some 50,000 refugees and returnees have arrived in eastern **Chad** from **Sudan** so far this year. New displacement and insecurity in **Sudan's Darfur** and in the **Central African Republic** are undermining livelihoods, and could affect the 2013 crop.
- The 2013 growing season is underway in **east Africa** and the **Sahel**. March to May rains were adequate in most parts of the Greater Horn of Africa, with the exception of the northeastern **Ethiopian** highlands. Rice availability in **Asia** remains ample and prospects for the main wheat harvest are favorable in **Central Asia**.
- The spread of coffee leaf rust is expected to continue disrupting rural labor markets in **Central America** during the 2013/2014 season.
- Insufficient January to May rainfall has led to crop and livestock losses in **Bolivia** and **Ecuador**.

Key trends in food security

MAY – JULY 2013

The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

Regional highlights

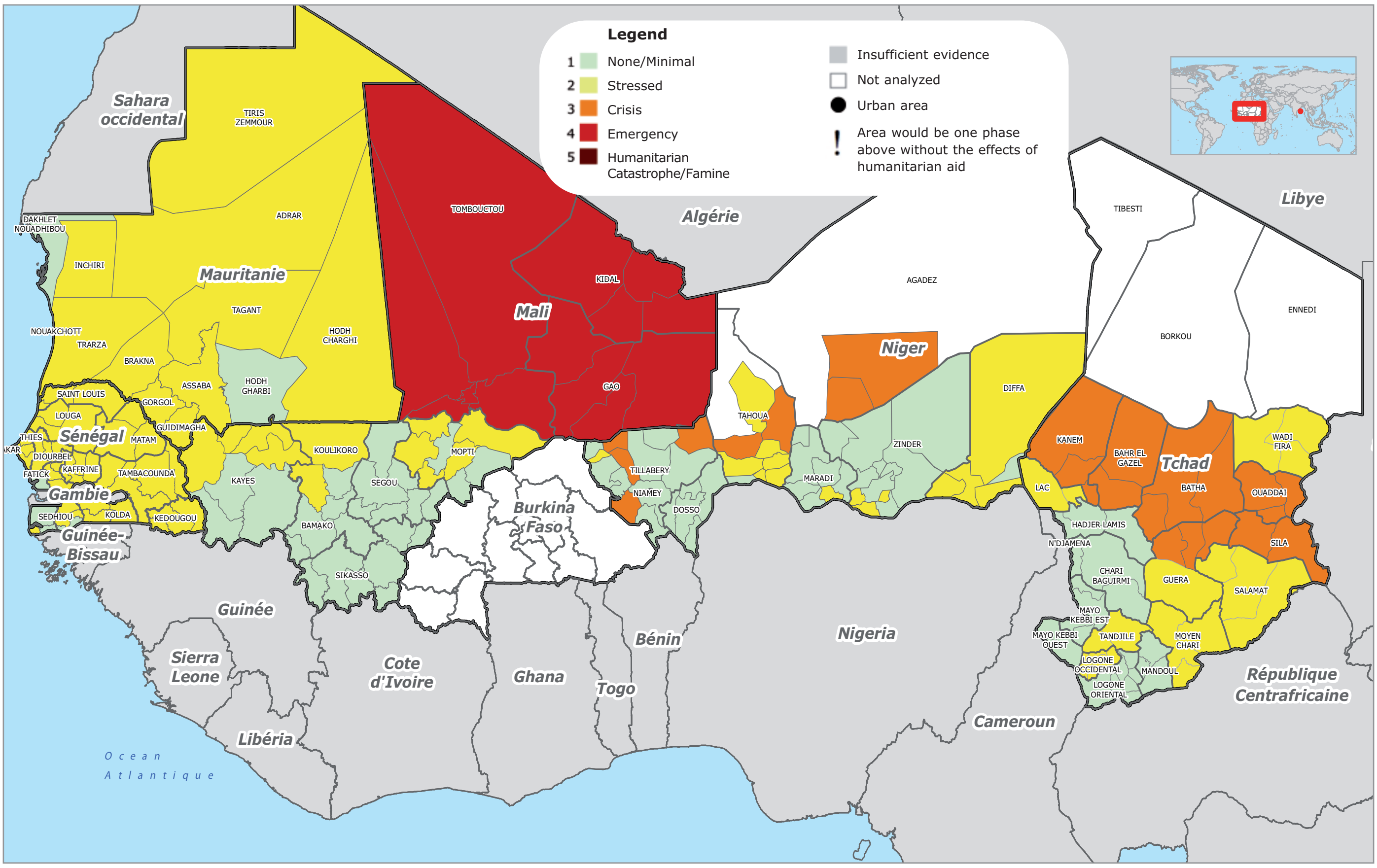
EAST AND CENTRAL AFRICA

- Food security conditions continued to improve compared to the long term trends and last year, thanks to stable but above-average food prices, stable food availability, improving security and generally good rains. Prices of coarse grains in key markets in the Eastern Africa region remained stable or declined in May.
- However, 4.9 million people in the region are still in IPC phases 4 'emergency' and 3 'crisis'. Pockets of IPC phase 4 persist in the south-eastern areas of **South Sudan**, whereas IPC phase 3 food insecurity prevails in central and eastern **Ethiopia** (mainly Oromia, Afar and parts of Amhara) and southern Somali region; northern **Djibouti**, pockets of northern **Somalia**, and central **Burundi** (the Plateaux Humides).
- In **South Sudan**, insecurity remains a major obstacle to farming and humanitarian access in parts of eastern Jonglei. Should tensions with Sudan flare up, disruptions to cross border trade might undermine food availability and access in the northern border states. Rainfall patterns have been mixed: in western and northern Bahr el Ghazal, parts of Lakes Warrap, Central Equatoria, Twic East in Jonglei and the Kapoeta region have so far experienced late and erratic rainfall with impacts on crops. However, for most parts of Upper Nile and Jonglei, the season has started well.
- In **Uganda**, erratic precipitations in April-May could impact the October harvest should July and August rains be below average. A May 2013 WFP survey in Karamoja indicates that food consumption indicators have worsened compared to 2012. There are concerns over malnutrition; GAM levels for a number of districts are above the alert level of 10 percent. In July, a new refugee influx from the Democratic Republic of the Congo was reported in the western district of Bundibugyo.
- Phase 2 'Stressed' food security will prevail for most rural livelihood groups of **Somalia** for July to December 2013. Market prices are stable, while terms of trade remain favorable for poor households. Although the performance of Gu (main season) rains was favorable overall, some areas received poorly distributed rains. A deterioration of food security outcomes is expected in some Southern and central agro-pastoral areas in Hiran due to the impact of irregular rainfall and Middle Shabelle where flooding destroyed crops in April and May.
- While *belg* production has been delayed in south-eastern and southern **Ethiopia**, prospects are poor in the northern *belg* growing areas. Of particular concern is the situation in North Shewa of Oromia where virtually no *belg* harvest is likely. In these areas, household food deficits are expected to remain above average until the end of the main *kiremt* rains in September.
- Rainfall through August 2013 is expected to vary from just above or just below normal across the region. For much of South Sudan, northern Uganda, Burundi western Darfur in Sudan, below normal to normal rainfall is anticipated. Ethiopia, Sudan, Rwanda, and Upper Nile in South Sudan are expecting normal to above normal rainfall. The rains will mark the start of the main agricultural season in most of South Sudan and Darfur as well as the main *meher* agricultural season in Ethiopia.

WEST AFRICA

- According to the *Cadre Harmonisé*, northern **Mali** is expected to face 'emergency' (phase 4) conditions due to conflict impacts on livelihoods. 'Crisis' conditions are expected to prevail in much of the Sahelian belt of **Chad**, and in agro-pastoral parts of **Niger**, due to the effects of repeated shocks and high food prices in Nigeria. 'Stressed' food security outcomes are expected in much of **Senegal** and **Mauritania**, and southern Chad.
- The number of internally displaced persons (IDPs) in **Mali** is thought to exceed 350,000 people, and a limited number of returnees have been reported in Tombouctou and Gao regions. As of May, according to UNHCR, there were over 174,000 Malian refugees in Mauritania, Niger and Burkina Faso. In **Mauritania**, the May UNHCR/WFP assessment shows that although assistance has improved in Mbera camp, global acute malnutrition remains above 10 percent.

Acute food insecurity phases, June 2013



Source: Cadre Harmonise, CILSS.
The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

- Millet prices remain 30 to 45 percent above their five year average in markets of **northern Nigeria** and **Niger**, eroding purchasing power for households at a time when food stocks are at seasonal lows. An interagency market survey determined that supply routes in the eastern Sahel have changed following disruptions to production and trade in Nigeria, the region's main grain producer, with Burkina Faso and Mali playing a more prominent role in supplying Niger than in the past. In addition, maize is sourced from Burkina Faso (through Niger) and Benin to supply both northern and southern Nigeria. Market conditions will remain tight until the main September/October harvest.

- In the **Central African Republic**, a June interagency assessment determined that pervasive insecurity continues to drive food insecurity in the country. The loss of food stocks due to looting, food price increases, lower incomes are affecting household food access.

- Conflict in Sudan's Darfur has led to the arrival of some 50,000 people – both refugee and returnees – in the remote Tissi area of **eastern Chad**. The refugee arrival, and the associated increase in demand at local food markets, has caused food prices to increase.

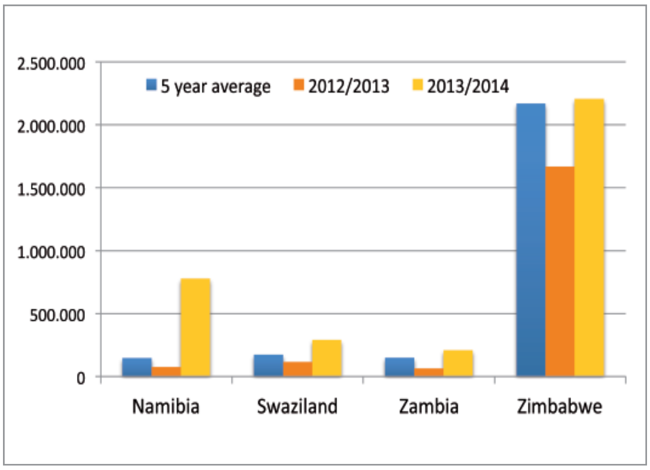
- Terms of trade for cashew nut producers in **Guinea-Bissau** are below average. Farm gate prices have been 60 percent below last year, while more than a third of the harvest remained unsold at the end of the marketing season. The main factors contributing to depressed prices include low credit availability and lower international demand. Because of lack of cash crop income, producer's food access will remain fragile until the October 2013 harvest.

- As the 2013 rainy season progresses, areas of below average vegetation have been identified in **western Mali** and north central portions of **Nigeria**. Atypical desert locust activity is also reported.

SOUTHERN AFRICA

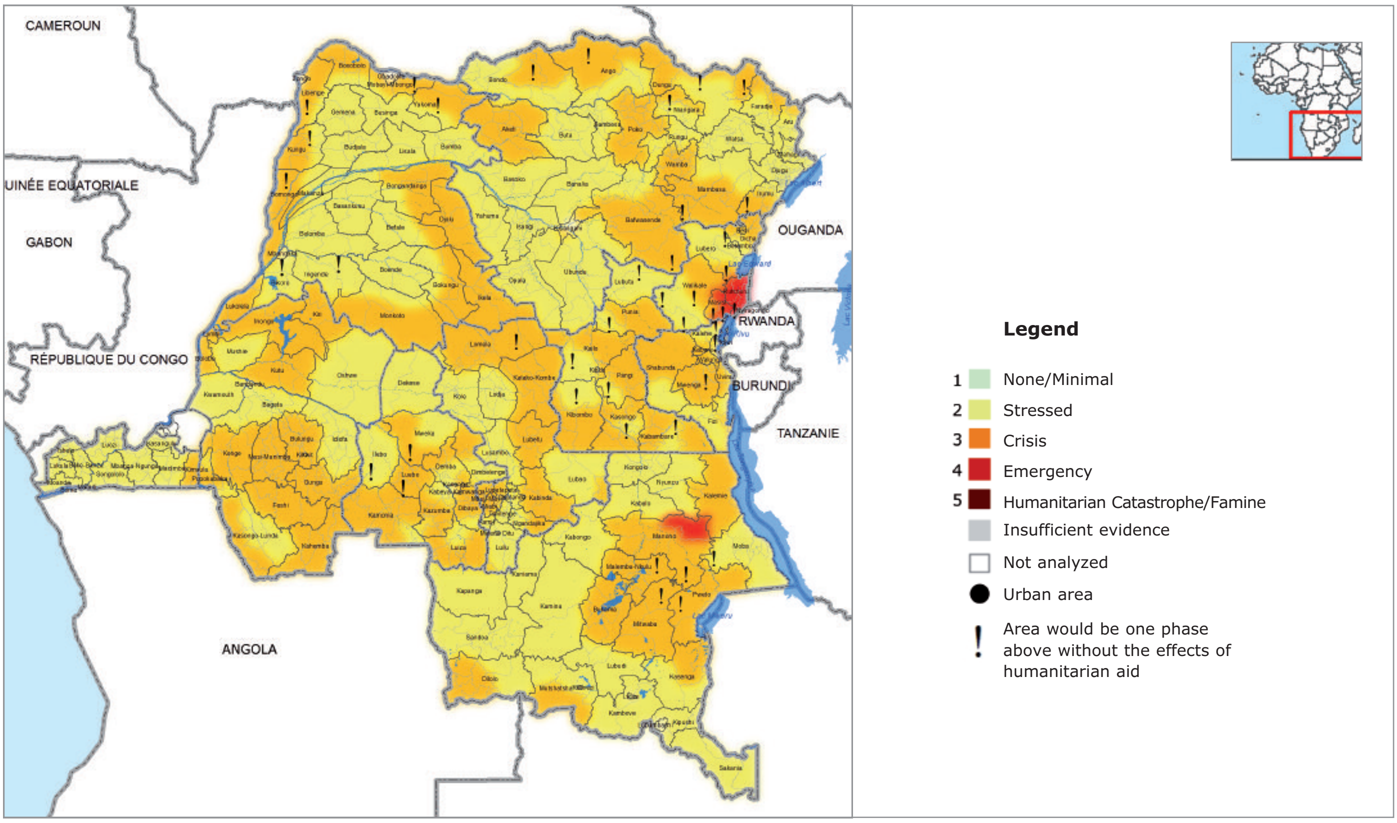
- The 2012/2013 season performed differently across the region. While **Zambia** again produced a grain surplus, in **Zimbabwe**, the current harvest may only cover less than half of national grain requirements (estimated at some 2.1 million tons) -- leaving more than one million tons to be sourced outside the country. Malawi registered surpluses in high potential areas, while also facing localized deficits. Overall, availability of maize for regional trade will be limited, and prices are expected to remain above the 5-year average.
- VAC assessments have determined that the number of food insecure people for the 2013/2014 consumption year is above last year and the 5 year average in **Namibia, Swaziland, Zambia** and **Zimbabwe**.
- According to the **Malawi** Vulnerability Assessment Committee (MVAC) assessment, 1.4 million people will be food insecure people during 2013/14, representing 9.5 percent of the total population. MVAC has projected an increase in the food insecure population during the peak hunger period; a follow up assessment is being planned for October.
- The results of the post-drought emergency food security assessment conducted in **Namibia** in May 2013 indicate that some 330,925 people (20 percent of households) are food insecure, while a further 447,577 people (27 percent) are moderately food insecure. Market availability of pearl millet and maize has declined due to drought impacts.

Number of Food insecure, 2013/2014 vs 2012/2013 and the 5-year average



Source: RVAC; 4 year average for Namibia.

Integrated Food Security Phase Classification in Democratic Republic of the Congo, June 2013



Source: IPC team of the Democratic Republic of Congo.
The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

- The VAC assessments in **Lesotho** indicates an increase in grain production compared to last year and a reduction in the number of food insecure people from 725,000 in 2012/2013 to 223,000 projected for 2013/2014.

- In the southwest region of **Madagascar** a large-scale locust infestation and cyclone Haruna have negatively impacted household food security, mainly access to own production of cereal and cassava. The 2012/13 rainy season was below average in several areas of the country, including food basket regions; this year's crop production is expected to be below the previous agricultural season.

- In **Democratic Republic of the Congo**, according to IPC analysis carried out in June 2013, 6.35 million people are classified in IPC phases 3 'crisis' and 4 'emergency'. There has been a slight overall improvement since the previous analysis of December 2012. While a higher number of territories have been classified as phase 3 'crisis', on the other hand only two territories are in phase 4 'emergency': Northern Kivu (Rutshuru, Nyragongo, Masisi and Walikale) and Katanga (Manono). Since May, some 43,000 refugees from the Central African Republic arrived in Equateur and Orientale provinces, adding to the phase 2 'stressed' and phase 3 'crisis' conditions.

MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

- More than 5 million people have been displaced or re-displaced inside **Syria**, while over 1.7 million have fled to neighboring countries (registered as refugees or awaiting registration), with the largest numbers in Lebanon (605,000), Jordan (490,000), Turkey (402,000), Iraq (160,000) and Egypt (91,000) according to UNCHR, as of July 15.

IN FOCUS: SYRIA CROP AND FOOD SECURITY ASSESSMENT MISSION (CFSAM)

According to the joint FAO-WFP CFSAM conducted in Syria in May-June, **the area planted to cereals reached a 10-year low** on account of high production costs, reduced input and labour availability, damage to machinery, insecurity and the abandonment of land. The high cost of diesel, which is needed to run water pumps, has had a negative impact on agriculture. Damage to silos and storage may lead to an increase in post-harvest losses. The 2013 wheat production is estimated at 2.4 million tonnes, significantly lower than the average of the ten years prior to 2012/2011 that exceeded 4 million tonnes. The 2013 wheat crop will be approximately 15 percent lower than the poor 2011/12 harvest outcome.

The wheat supply chain has been affected as less than one-third of government's collection centres are operational. Most wheat flour milling factories and bakeries are either no longer functioning or are running at low capacity. Only 1 in 4 yeast factories are operational. Where they remain open, government bakeries produce bread that is sold at highly subsidized prices. Poultry production has declined by more than 50 percent compared to 2011, while sheep and cattle numbers have declined by between 30 and 40 percent and between 20 and 30 percent respectively.

The mission found that the internal crisis and financial sanctions are disrupting macroeconomic conditions, with **impacts on food prices, labour markets and household food access**. In 2012, year-on-year inflation rose by 50 percent from 2011. Average inflation is expected to stand at above 30 percent in 2013. The official value of the Syrian pound has declined sharply by over 115 percent since 2011. The government now offers premium prices for wheat grain, in order to boost production. The real price of wheat flour, the main staple, has almost doubled from 2011, while that of livestock has fallen. The cost of diesel sharply escalated, with a 200 percent jump in January 2013, after cuts in government subsidies. The official unemployment rate is estimated at 18 percent in 2013, compared to a 7-year average of 8 percent before 2011.

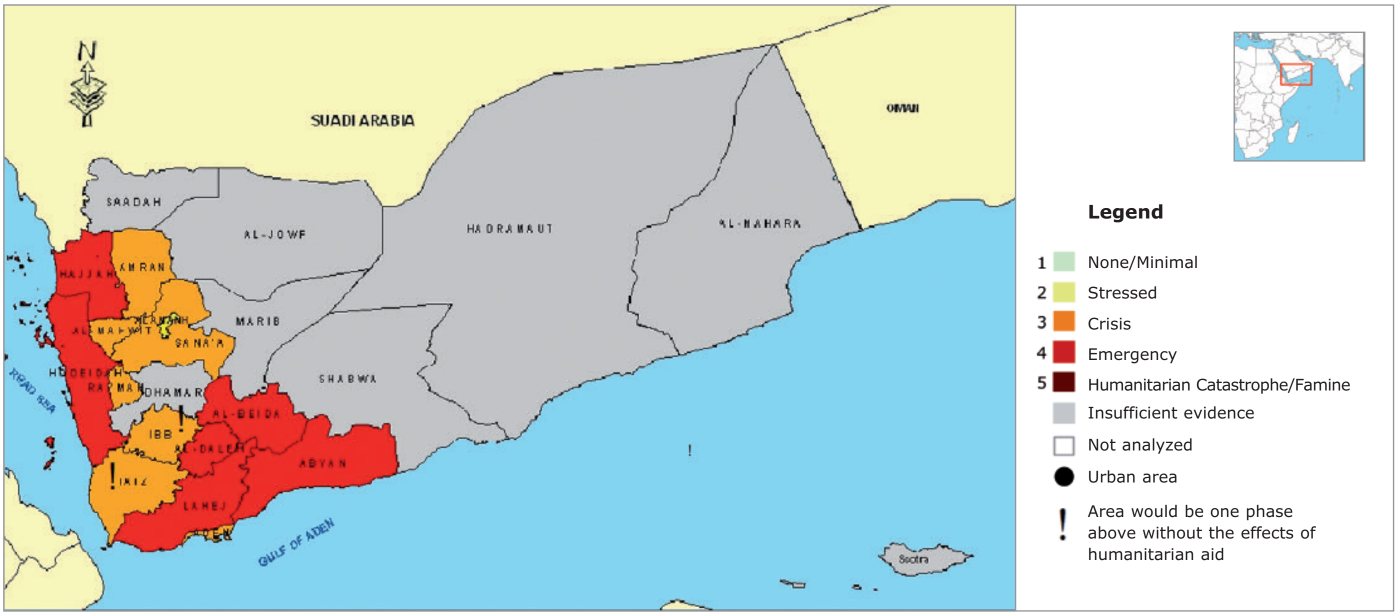
Households have difficulties accessing basic staples due to lack of income, high prices and increasing shortages. Main impediments to trade are insecurity, limited transport facilities, lack of supplier credit and limited availability of foreign currency. The industrial sector has collapsed, which means loss of employment. Due to rising food prices, many households are facing **significant increases in food expenditures.** IDPs are also facing increases in house rent and health expenditures. **Quality of diet and micro-nutrient intake is likely reduced** as most households are cutting substantially on consumption of fruits, meat, dairy products and eggs.

- In **Sudan**, insecurity in South and East Darfur is disrupting trade, leading to high cereal and fuel prices. Substantial population displacement is reported due to insecurity in these areas. Conflict is also expected to have an impact on the on-going cropping season, due to restricted access to land. Despite humanitarian assistance (mostly food) being delivered according to schedule, production in South Kordofan and Blue Nile states may be compromised this season due to lack of inputs and access to farm lands due to insecurity. As of May, sorghum prices in Blue Nile state were 23 percent above their level in 2012.

- Although wheat prices have been declining since March in both **Kyrgyzstan** and **Tajikistan**, the level of prices remains near record levels and continues to constitute a risk to food security. Prospects for the August/September harvest seem favourable.

- The April 2013 IPC round has determined that some 8m **Yemenis** were facing IPC Phase 3 and Phase 4 food insecurity. Al Bayda, Abyan, Hodeyida, Hajja, Lahj and Al Daleh governorates are classified in 'emergency' phase 4 while Taiz, Ibb, Amran, Sana'a (rural), Aden and Raymah are in 'crisis' phase 3. The main drivers of emergency food insecurity in western and southern Yemen include drought, loss of income, and internal conflict.

Acute Food Insecurity in Yemen, April 2013



Source: IPC team.
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ASIA

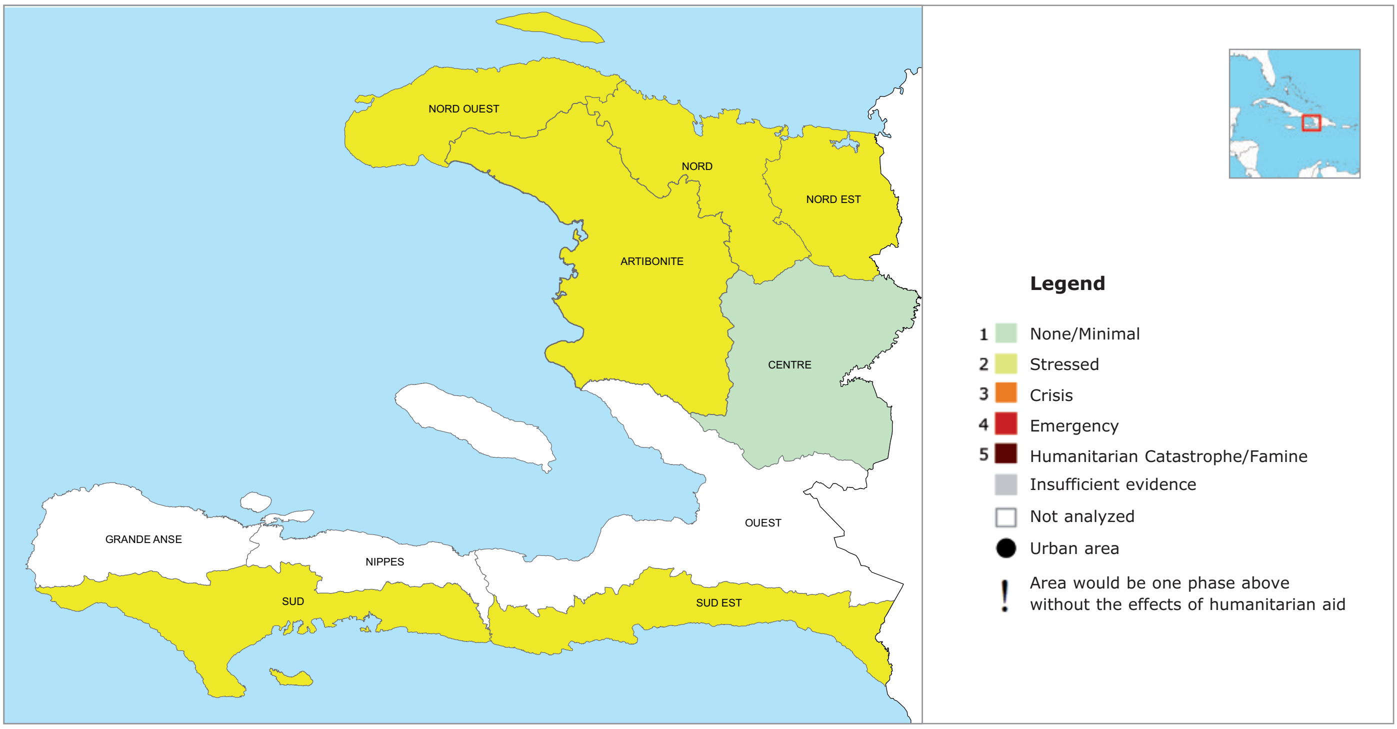
- Generally favorable prospects for the early season rice 2013 crop are reported in **Bangladesh, Cambodia,** and **Myanmar.** As a result of fair agro-ecological conditions, grain prices are generally stable in the region, with the exception of Myanmar where strong export demand is sustaining rice prices. Although wheat prices remain above the five year average in parts of **Afghanistan**, prospects for the main 2013 wheat harvest appear favorable. In spite of good prospects for **Pakistan**'s main wheat harvest, prices remain in an upward trend that dates back to late 2012.

- In June 2013, flooding provoked by early monsoon rains affected **India**'s Uttarakhand and Himachal Pradesh states and western **Nepal.** The flooding has led to crop and livestock losses, has damaged transportation infrastructure, severing market links and undermining immediate and food access for affected households. In Nepal, some flood-affected districts of Western Nepal were experiencing IPC Phase 2 'Stressed' food insecurity conditions in the first quarter of 2013.

LATIN AMERICA AND CARIBBEAN

- In **Central America,** early prospects for the 2013 crop are favourable. By contrast, seasonal rainfall has been below normal in the southwestern peninsula of **Haiti,** affecting crop development and prolonging the lean season until the August/September harvest.
- The June IPC round in **Haiti** indicated that most *départements* are facing IPC phase 2 'stressed' conditions. Some households within these areas – such as the agro-pastoral areas of North, Artibonite and Central Highlands - are at phase 3 'crisis'. These outcomes are the result of a late start to the rainy season, hurricane impacts in 2012 and resulting declines in casual labor opportunities. In addition, the prices of imported foods are high reducing purchasing power. Access to water remains precarious for a large part of the population.

Integrated Food Security Phase Classification in Haiti, June 2013



Source: Haiti IPC team.
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- A May WFP assessment in **El Salvador** determined that some 12,800 casual labor reliant households are vulnerable to food insecurity as a consequence of the coffee rust outbreak. The loss of income due to a decline in working days is reducing household food access. Income levels for vulnerable households are 30 percent below the cost of a basic food basket. Vulnerable households have limited access to other income sources, while food stocks from own production were expected to be exhausted by July. Coffee rust is expected to continue to have significant impacts on labor markets in **El Salvador, Honduras, Nicaragua** and **Guatemala** in 2013/2014 as coffee plantations will have to curtail or stop production to halt the spread of the coffee rust.
- Poor rains in **Bolivia**'s drought-prone El Chaco region from January to March 2013 has led to substantial losses in maize and pulse production for subsistence farmers and has resulted in fodder and water shortages. Smallholder farmers are the most affected group. Some 80,000 people are affected in 14 municipalities of the departments of Chuquisaca, Tarija and Santa Cruz. Household food deficits will increase in September/October 2013 as stocks run out. Local areas of southern **Ecuador** have also experienced drought in May and June 2013, with impacts on crops and livestock.

Methodology

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

Acute food insecurity is classified according to 5 phases:

Phase 1: None/Minimal

Phase 2: Stressed

Phase 3: Crisis

Phase 4: Emergency

Phase 5: Humanitarian Catastrophe/Famine

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

Acronyms

CFSAM	Crop and Food Security Assessment Mission
FAO	Food and Agriculture Organisation of the United Nations
IDP	Internally displaced person
IPC	Integrated Food Security Phase Classification
MVAC	Malawi Vulnerability Assessment Committee
RVAC	Regional Vulnerability Assessment Committee
UNHCR	United Nations High Commissioner for Refugees
VAC	Vulnerability Assessment Committees
VAM	Vulnerability Analysis and Mapping
WFP	World Food Programme

Information sources

FAO: www.fao.org

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

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