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Global Food Security Update

TRACKING FOOD SECURITY TRENDS IN VULNERABLE COUNTRIES

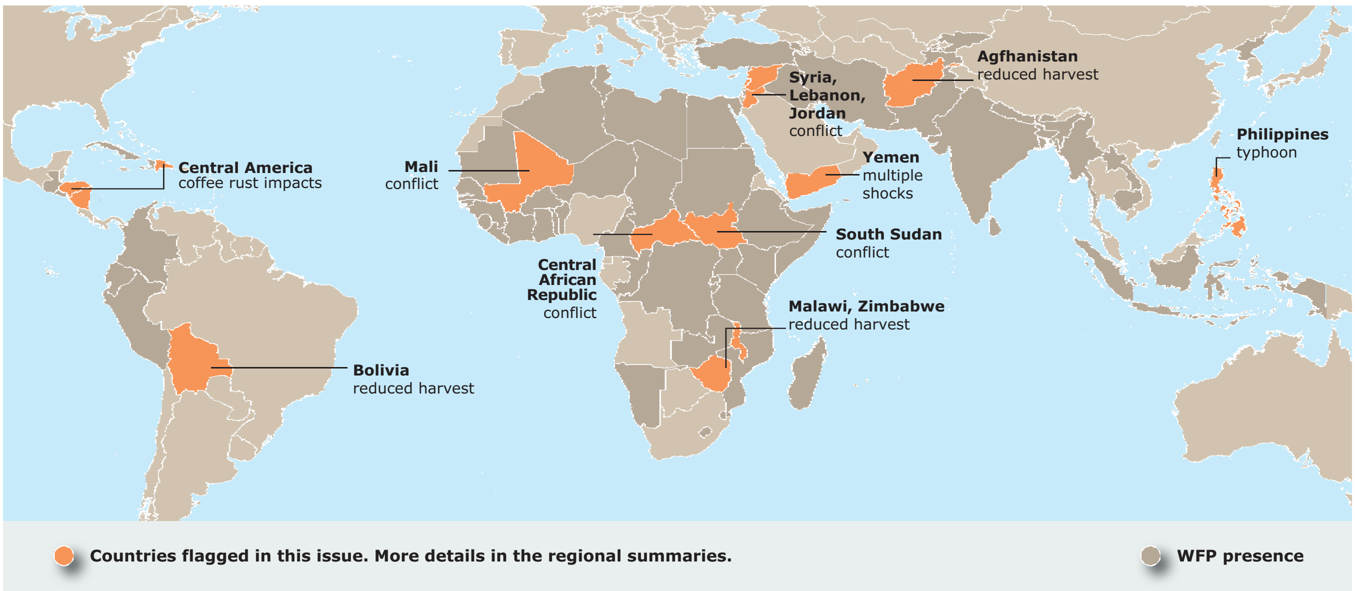
The Global Food Security Update provides a quarterly overview of key food security trends in vulnerable countries. Information is provided by WFP VAM field teams and partners.

In focus

- Continuing conflict in **Syria** has led to the internal displacement of 6.5 million people, while nearly 2.5 million refugees live in neighboring countries. Half of the country's population is now assessed as food insecure. Currency depreciation and supply chain disruptions have led to large food price increases. Humanitarian access remains extremely challenging.
- Widespread conflict in **South Sudan** is causing displacement and disruption to trade, in a context where most households are market-dependent. Should the conflict last beyond April, an impact on the 2014 crop is expected.
- Following an upsurge in violence and population displacement in the **Central African Republic**, food insecurity is rising in Bangui and in rural areas. The population will rely on humanitarian assistance or market purchases until the next harvest in mid-2014.
- In typhoon-affected areas of the **Philippines**, some 27% of the population remains food insecure, and needs continued food assistance.
- In **Yemen**, over 10 million people are assessed as food insecure. Political instability, declining economic growth and the volatility in the prices of food and other essential commodities are the main drivers of food insecurity.
- As the lean season peaks in Southern Africa, 2.2 million people are assessed as food insecure in **Zimbabwe**, and 1.8 million in **Malawi**.
- Coffee rust continues to disrupt smallholder income and unskilled labor markets in **Central America**, with impacts on food security.
- In the last quarter of 2013, parts of **Kenya**, **Somalia** and **Tanzania** have been affected by severe rainfall deficits.

Food insecurity hotspots

FEBRUARY 2014



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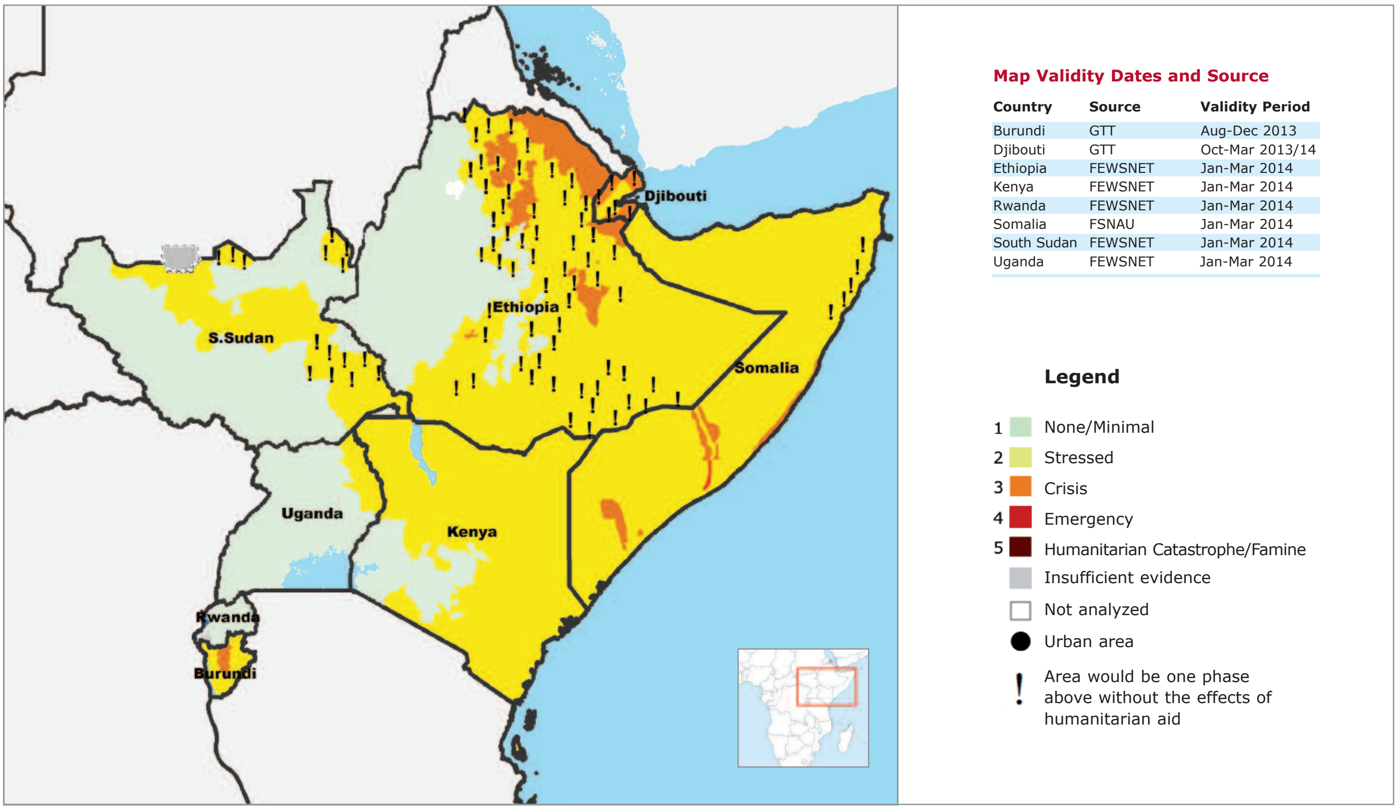
Fighting Hunger Worldwide

Regional highlights

EAST AFRICA

- Favorable food security conditions prevail in most parts of the region following overall average to above average main harvests in 2013. However, over 7.1 million people were estimated to live in conditions of Crisis and Emergency (IPC Phases 3 and 4) in November 2013. These populations are in northeastern Amhara, Eastern Tigray, and eastern Oromia in **Ethiopia**; Hiraan Agropastoral, Coastal Deeh Pastoral livelihood zones, and Bari Region in **Somalia**; central **Burundi** (the Plateaux Humides); Obock and Ali Addeh regions in **Djibouti** and in **South Sudan.** The conflict in South Sudan is significantly contributing to food insecurity in East and Central Africa. As of January 29th, OCHA reported that approximately 825,000 people had been displaced. The large majority were internally displaced (702,000 in South Sudan) while 123,000 had crossed over into neighbouring countries.
- Even prior to the instability surrounding South Sudan, IPC analysis highlighted concerns in neighboring countries. For example, Uganda's Karamoja region has been assessed as an area currently under Stress (IPC Phase 2). In **Kenya**'s Northern and North-Eastern Pastoral zones, a deterioration in food security is evident, compared with December 2012. Food insecurity in these areas is driven by below normal harvest following poor main rains of 2013, floods and tropical storms over the last quarter of 2013, and conflict impacts.
- In the rest of the region, seasonal stable food security conditions are expected to continue through February as a result of near-to average projected harvests following overall normal to slightly below normal rainfall during the last quarter of the year. Kenya and Somalia could be the only exception to such trend.
- In the last quarter of 2013, severe rainfall deficits have hit parts of Kenya and Somalia as well as Tanzania. In Kenya, the worst affected areas are the southeast and northeast of the country. Significant impacts on crop production and pasture resources are expected. In southernmost parts of Somalia, the growing season remained severely affected by persistent and strong rainfall deficits leading to major declines in vegetation and crop and pasture development. Tanzania was also affected by a delayed start of the Vuli rains in the central areas of the country; in the eastern half of the country pronounced rainfall deficits during December were noticeable.

Food Security Conditions (December 2013)



Country	Source	Validity Period
Burundi	GTT	Aug-Dec 2013
Djibouti	GTT	Oct-Mar 2013/14
Ethiopia	FEWSNET	Jan-Mar 2014
Kenya	FEWSNET	Jan-Mar 2014
Rwanda	FEWSNET	Jan-Mar 2014
Somalia	FSNAU	Jan-Mar 2014
South Sudan	FEWSNET	Jan-Mar 2014
Uganda	FEWSNET	Jan-Mar 2014

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

South Sudan: conflict will undermine food access for market dependent households

A major military confrontation between different factions erupted in mid-December 2013. The conflict primarily affects the states of Central Equatoria, Jonglei, Unity and Upper Nile. Lakes, Warrap and eastern Equatoria are indirectly affected. As of 29th January 2014, the conflict has caused the displacement of over 825,000 people.

The food surplus-producing western states in the greenbelt area have not yet been directly affected by the conflict. Although the violence began after the 2013/2014 harvest had been completed, the food security outlook for South Sudan in 2014 has fundamentally changed, due to severe impacts on livelihoods and markets.

Households obtain more of their food from markets, rather than own production

The conflict has resulted in the loss of lives and assets, including livestock, the main livelihood source for most households. It has also curtailed trade and market access, leading to supply shortages and staple food prices hikes.

In the wake of independence in 2011, many areas of South Sudan became dependent on supplies from Uganda. However, long distances, poor roads, extremely expensive fuel, unfavorable exchange rates, and official and unofficial taxes, contributed to high food prices in South Sudan over the past two years. Fighting in December and January has affected the main north-south road corridor used for trade with Uganda.

Food Security Monitoring System data from 2010-2013 has shown that household reliance on markets in South Sudan is high: throughout the year, more food is sourced through markets than own production, nearly everywhere in the country. The states currently most affected by conflict (Jonglei, Upper Nile and Unity) are those where households exhibit the highest dependence on markets, in particular after the harvest. As households spend high proportions of their income on food, they are vulnerable to the significant price rises that are likely to result from the conflict.

Outlook for the first quarter of 2014: key factors and timeline

The conflict will have severe impacts on the food security status of the populations of South Sudan. Overall, the harvest was below-average, while conflict-induced disruption to markets will affect physical and economic access to food, especially for the directly affected population in the states where the conflict is most severe. Significant increases in food requirements are expected in areas with high IDP concentrations. The severity of these impacts will be magnified if the conflict lasts into the 2014 agricultural season, which will start in April.

WEST AFRICA

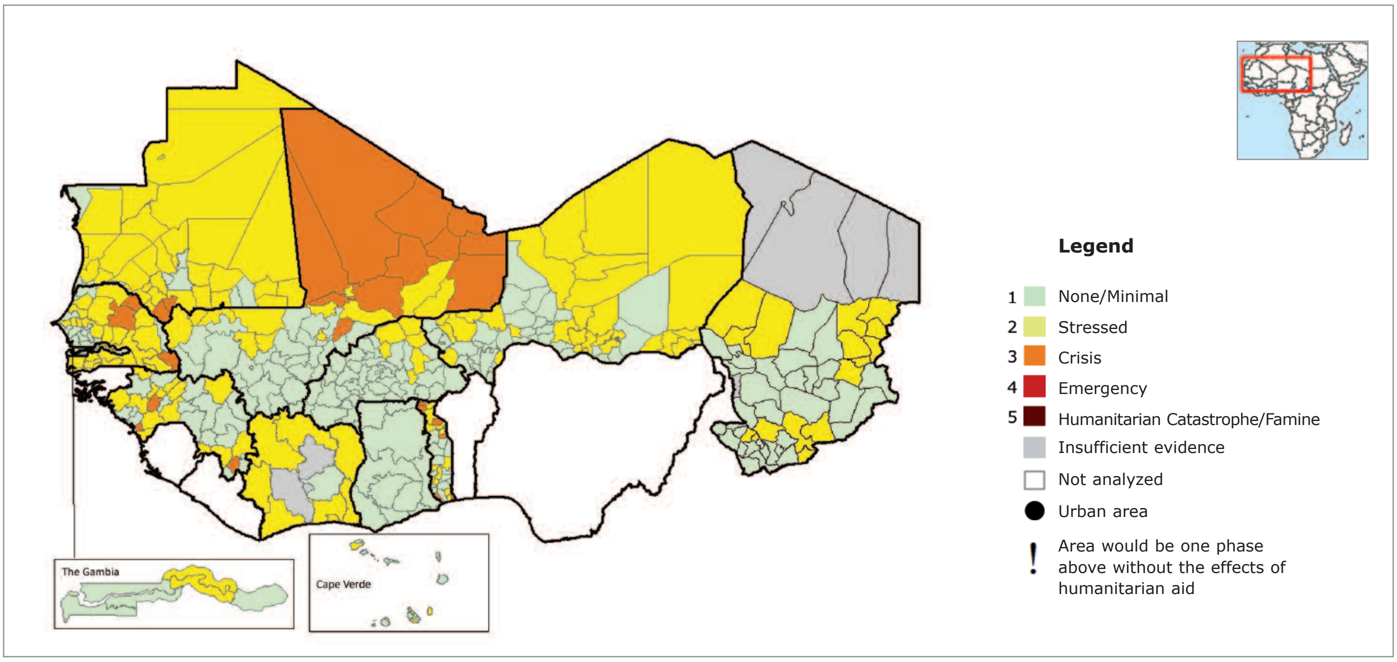
- According to the *Cadre Harmonisé* results, 13 million people are food insecure (**Burkina Faso, The Gambia, Niger, Senegal, Mauritania, Côte d'Ivoire** and **Chad**) despite average harvests. Crisis (Phase 3) conditions continue to prevail in Northern Mali, due to the persistence of insecurity and poor growing season conditions in localized areas. Similar pockets of unfavourable growing season conditions also exist in neighboring countries.
- The population is facing Stressed (Phase 2) levels of food insecurity in much of the agro-pastoral Sahel and parts of Cote d'Ivoire. It is estimated that some 4.5 million children under the age of five suffer from acute malnutrition in West Africa.
- The projected performance of the 2013-2014 crop is mixed, with above-average production in the coastal countries, and average to below-average conditions in parts of the Sahel. Overall, projections indicate that cereal production for West Africa will total 57.4 million tons, 16% above the five-year average. While production in coastal zones is expected to be favourable, the projection for the Sahel stands at 19.5 million tons of grain, 1% above average. The projected 17% year-on-year decline in the millet crop may lead to price impacts for that commodity which is a widely grown and consumed staple in the Sahel.
- Cereal prices are decreasing seasonally on most markets, while remaining above their respective five year averages in Burkina Faso, Niger, Nigeria and Chad. Elevated millet and sorghum prices in these countries are raising concerns over food security and for regional food procurement opportunities. Ample international supply caused prices of imported rice to fall in Senegal and Mali, and allowed other rice markets in the region to remain stable.
- The pastoral situation is generally good with adequate animal health, pasture and water availability. However, pasture deficits are observed in local areas of Niger, Chad, Mauritania, Senegal and Mali. In these areas, pasture availability may deteriorate before the usual pastoral lean season, causing premature livestock movements and potential conflicts.

In focus

Central African Republic: upsurge in violence increases food security needs

- Following the upsurge in violence in December 2013 in the **Central African Republic**, a Multi-sector/cluster Initial Rapid Assessment (MIRA) was carried out in Bangui and in provinces of the north west. Findings indicate that a decline in food consumption is taking place, while prospects for the 2014 crop are uncertain.
- In assessed areas, the average number of meals has declined from two or three to one a day. A reduction in the quality of meals is also reported. As household food stocks are running out in rural areas, they will rely on humanitarian assistance or purchases until the next harvest mid-2014. High levels of insecurity since December have made humanitarian access unpredictable.
- The conflict's impacts on trade and commerce and household assets are reducing the population's ability to earn income. Food prices across the country have increased substantially due to disrupted transportation and markets. In December, prices increased by 35-40% for oil, sugar and milk and by 15-25% for cassava and maize. It is expected that the CAR's food insecure population will increase in size during the coming months. IPC analysis carried out prior to December 2013 estimated CAR's food insecure population at 1.3 million (IPC Phase 3 and 4).
- Prospects for the 2014 crop are uncertain in assessed areas, as almost all communities report not having enough seed to plant for the next agricultural season. The loss of draft animals through looting and disruptions to the casual labor market have also weakened livelihoods.

West Africa food security conditions (October-December 2013)



Source: cadre harmonise/CILSS.
The boundaries and names shown on this map do not imply official endorsement or acceptance by the United Nations.

SOUTHERN AFRICA

- Food insecurity levels are at their annual high as the lean season peaks. Stressed (IPC 2) or Crisis (IPC 3) conditions will prevail in areas of Malawi and Zimbabwe that experienced a reduced harvest in 2013. Food security conditions in the region are expected to improve as the harvest begins in March.
- In **Malawi**, the vulnerable population requiring food assistance during the lean season has increased from 1.4 million to 1.8 million according to the updated November assessment conducted by Malawi's Vulnerability Assessment Committee. Main factors contributing to food insecurity include low crop production as a result of earlier dry spells, floods, and input shortages; secondary factors include low food stocks and unstable maize supply.

- In **Zimbabwe**, food insecurity is projected to affect 2.2 million people in rural areas (one quarter of the rural population) by March 2014. At its peak in March 2014, the highest levels of rural food insecurity are projected in the southern and western half of the country, in Matebeleland North (40%), followed by Masvingo Province (33%), Matebeleland South (32%) and Midlands Province (31%). Negative coping mechanisms are being employed in most communities, including illegal mining activities, cross-border trade, and distress disposal of assets, such as livestock.
- The regional maize market continues to be tight, due to local production deficits and strong export demand. In the last quarter of 2013, maize prices increased by 15% on SAFEX, due to a dry spell in productive areas of South Africa, and strong overseas demand. The trend to higher prices in South Africa could sustain above-average maize prices in the southern African region. **Zambia**, with a maize surplus, continues to restrict commercial maize exports. Tight maize prices are observed in food-deficit areas of the region. For instance in Zimbabwe, the price of maize in November 2013 was 31% higher in dollar terms than a year before.
- Food security trends in Southern Africa will hinge on the performance of the rains during the second half of the 2013-14 season, from January through March. Early season deficits predominated eastern and southern **Mozambique**, Malawi and eastern Zambia until early December. This was followed by heavy rainfall across the region from mid-December onwards, which eased these deficits. Although the rainfall will last until March/April, impacts from delayed planting are likely. According to the Southern Africa Regional Outlook Forum, the seasonal forecast calls for moderately drier than average conditions for Mozambique during the first quarter of 2014. If realized, this would lead to significant impacts on crop production in those areas.

MIDDLE EAST, NORTH AFRICA AND CENTRAL ASIA

- In **Syria**, a preliminary analysis of results from the recently concluded Joint Rapid Food Needs assessment suggests that 9.9 million people, or approximately half the country's current population, are unable to purchase sufficient food to maintain their usual level of consumption. Further analysis of the data with a view to prioritizing districts against food insecurity and vulnerability indicators, suggests that 6.3 million people in 32 districts (of 59 assessed) are highly vulnerable and in critical need of sustained food assistance; an increase of more than 50% since the last estimate of 4 million presented in June 2013. Currently, there are almost 2.5 million Syrian refugees in Lebanon, Jordan, Turkey, Iraq, and Egypt.
- The conflict continues to hinder the effective movement of goods and trade within Syria. WFP monitoring indicates that the price of bread has continued to increase due to bakeries' reduced production capacity, wheat flour shortages and higher transportation costs. In Aleppo governorate, bread sold in private shops was nine times more expensive than the subsidized price. From May to December, in Daraa governorate, the price of commercial bread increased by a factor of seven in Mzereb and of five in Daraa. Similarly, commercial bread prices went up by a factor of four in the Rural Damascus markets of Qudsayya and Al-Tall over the same period. Long queues were also observed to have increased at the government bakeries that maintained the subsidized price. There are reports that at some government bakeries, the quantity of bread is rationed at 3kg per day per person. Government bakeries remain the main source of bread.
- Widespread fuel shortages and fluctuation in diesel prices also contributed to higher prices for other basic food items, particularly vegetables, sugar, lentils, rice and vegetable oil. WFP monitoring indicates a sharp decrease in household consumption of vegetables, meat, dairy products and fruits.
- Humanitarian access remains extremely challenging. In Al Hassakeh, one of Syria's more vulnerable and isolated governorates, escalating insecurity has largely restricted trade and the distribution of assistance through 2013. Access roads to the governorate are controlled by armed groups, who levy informal taxes on traders, further contributing to sharp food price increases.

Syrian refugees in the region

In focus

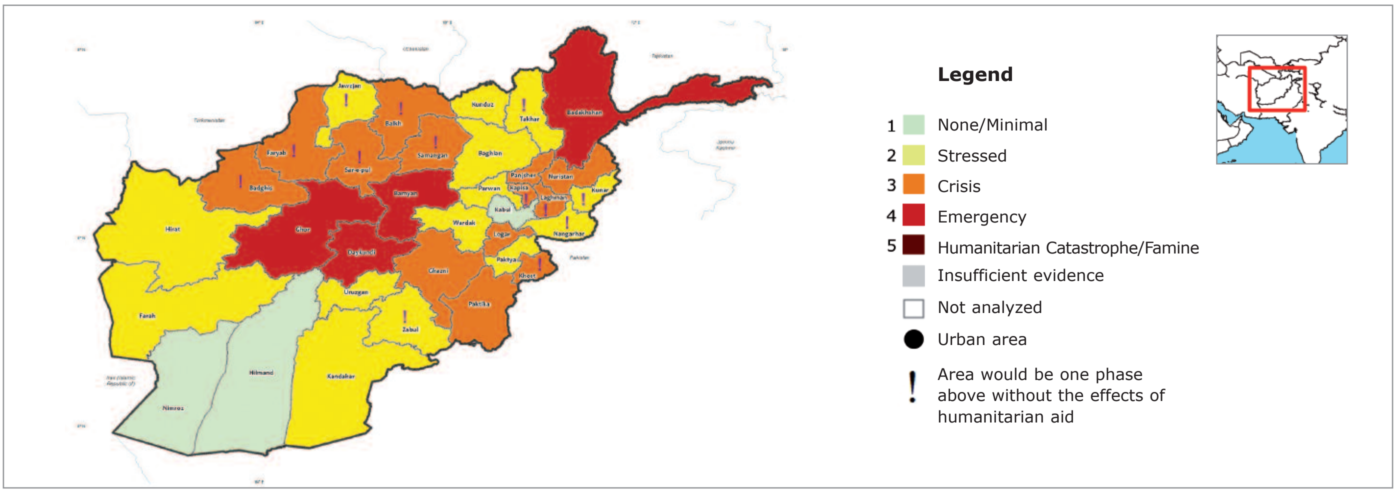
- Jordan: WFP monitoring carried out in Jordanian communities indicates that widespread indebtedness, the rising cost of food, rent and services is increasing the risk that vulnerable Syrian refugees and Jordanian families engage in negative coping mechanisms. Recent UNHCR/WFP Joint assessment activity confirms that the longer they stay in Jordan, the more likely refugees are to resort to such strategies.
- Lebanon: according to a WFP report released in December, 72% of the overall refugee population is food insecure and engaging in coping mechanisms. Three of every four refugee households is indebted.
- Turkey: refugees in Hatay are facing higher prices for vegetables and pulses, following devaluation of the Lira. Nonetheless, most beneficiaries are food secure and few households implement negative coping strategies.

- Although current food insecurity levels have slightly improved from a year ago, 42.5% of the **Yemeni** population remains food insecure. Some 4.5 million Yemenis are severely food insecure, while 6 million are moderately food insecure. According to the December IPC analysis, out of 19 governorates covered by the analysis, 4 governorates are classified as Phase 4 (Emergency), 9 governorates classified as Phase 3 (Crisis), and 6 have been classified as Phase 2 (Stressed). Political instability, declining economic growth and the volatility in food and other essential commodities explain the high levels of food insecurity. Other factors contributing to food insecurity include inflation, reduced remittances, high indebtness of poor households, as well as localized outbreaks of desert locusts and lower crop production in some areas.
- In **Egypt**, rising unemployment and inflation are challenging the ability of vulnerable households to meet their basic needs. According to the September 2013 Egyptian Food Observatory report, poor households surveyed in 10 governorates were more vulnerable to shocks and specifically food-price shocks. The share of households reducing the quantity of food consumed increased from 14.5% to 18% and other coping strategies such as borrowing food, or money to buy food, increased from approximately 28% to 35%.

ASIA

- According to the November 2013 IPC round in **Afghanistan**, two provinces, Badakhshan and Ghor, are classified as facing Emergency (IPC Phase 4) conditions. Approximately 28% of Afghanistan's population is understood as experiencing Crisis or Emergency (IPC Phases 3 and 4) levels of food insecurity. Some 8% of the population, or 2 million people, are in Emergency (IPC Phase 4) conditions. Recent shocks – particularly natural disasters, extreme weather, conflict, insecurity and animal disease – increased the prevalence of acute food insecurity in a number of provinces. The situation is expected to worsen in the first quarter of 2014 as a result of winter conditions and the blockage of roads in certain provinces. Market prices are expected to increase seasonally, while food availability will remain an issue. Bamyan and Daykundi provinces are expected to shift from Phase 3 to 4 because of poor weather, inadequate food availability and poor access to markets.

Afghanistan: projected food security conditions (January to March 2014)



Source: IPC team.
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- The typhoon made landfall in the Philippines on 8 November, 2013. The islands of Leyte and Samar were hardest hit. MIRA activities were carried out in November and December 2013. Official estimates suggest that the typhoon left 14 million people affected and 4.1 million displaced.
- MIRA results indicate that livelihoods, especially in farming and fishing, have been severely affected by the typhoon. Wind damage and powerful storm surges destroyed or damaged key assets and disrupted livelihood activities, resulting in income losses of up to 70 %. Most agricultural households report that it will take between 6 and 8 months to fully recover.
- As of December, markets were rapidly recovering across the affected areas and, in some cases, are fully functional. However, high and volatile prices are observed, particularly in the Eastern areas.
- In the immediate aftermath of the typhoon, households reported significant decreases in food consumption. While the food security situation has improved considerably with the increase in food assistance, the most vulnerable populations remain food insecure and highly dependent on food assistance. MIRA results suggest that 27 % of the population in affected areas remains food insecure, and needs continued food assistance to prevent further depletion of assets.

- In the **DPRK**, the FAO/WFP Crop and Food Security Assessment (CFSAM) mission found that the food security situation remains similar to previous years, with most households having borderline and poor food consumption. Consumption of protein and oils remains an issue of concern. Food consumption at the household level remains limited in quantity and quality. In particular, consumption of proteins (animal and soya) is infrequent and inadequate. Data indicates that only 16% of households in the DRPK have acceptable food consumption. Diet adequacy as measured by the food consumption score is comparable to last year's. The CFSAM observed immense logistical challenges for the public distribution system and therefore expressed concerns about the timeliness and consistency of food distribution. Markets and informal mechanisms of bartering and other forms of exchange are believed to be of increasing importance for household access to food, particularly in urban areas. The nutrition situation has improved in recent years; however, rates of stunting remain high and micronutrient deficiencies are of particular concern.

LATIN AMERICA AND CARIBBEAN

- In **Bolivia**, WFP monitoring confirms that the situation of the drought affected households in El Chaco Region and the south cone of Cochabamba continues to be fragile. The rainy season has started in these regions, and the next harvest will occur in April-May 2014. While the harvest will increase food availability, and contribute to food access, many households will continue to be unable to access sufficient calories and nutrients for an active and healthy life.
- Challenges and factors contributing to food insecurity include a lack of seeds and inputs for farmers, leading to smaller areas planted. Household food reserves are reportedly low. Many families cannot afford to purchase the feed needed for small livestock holdings. There is a larger number of workers seeking temporary employment, and with a glut of labour supply, wage rates are low, with a negative impact on household income.
- In **Colombia**, massive population displacement took place in the municipalities of Buenaventura and El Bagre during the last quarter of 2013 due to armed conflict. According to WFP monitoring, some 2,390 people were displaced in Buenaventura, while 14,000 people were confined in the rural areas of El Bagre due to roads being blocked by the FARC. The confinements and displacements restricted affected household's access to food and also impacted livelihood activities. Affected households are using their savings, relying on assistance from relatives and selling their assets to cope with the situation.

Assessing the food security impacts of coffee leaf rust in Central America

In focus

- A coffee rust outbreak in Central America and the Dominican Republic threatens the main source of income of hundreds of thousands of poor households. The coffee rust fungus was detected in late 2012 and was widespread by June 2013. Considering the magnitude of economic and social impacts, five countries within the region declared a national emergency due to the coffee rust.
- Some 1.9 million people in the region depend on coffee production as a primary source of income, many of whom are small holder farmers or seasonal workers. At the request of the national governments through the Central American Council, WFP has implemented food security related assessments in El Salvador, Guatemala, Honduras, Nicaragua and the Dominican Republic to better understand the impact of the coffee rust on livelihoods. The negative impacts for the coffee industry are expected to be long lasting. Some observers are suggesting that a full recovery might not be possible until 2016.
- In **Guatemala**, the effects of coffee rust have caused a reduction of employment opportunities in coffee plantations and casual laborers have started to migrate to other regions of the country to seek work. Meanwhile, primera crop losses in the dry corridor also affected farming households. Lower incomes and the decline in the basic grain harvest are leading to a depletion of household grain stocks and could therefore lead to more severe seasonal food deficits during the lean season.
- In **Honduras**, the effects of the coffee rust, low coffee prices and high input costs are causing a reduction of household incomes. The coffee crisis has led to the loss of 100,000 jobs. Wage laborers are facing a reduction in job opportunities and in the daily wage rate. According to the results of the November 2013 assessment, the food security situation and livelihoods of some 46,300 smallholder coffee growers and wage labor-dependent households have been affected. Many of these households are opting for survival strategies such as changing their diets, reducing the quantity of food and selling their productive assets. Although the coffee harvest will complete in February, and this will contribute to household incomes; food insecurity is expected to remain high for a variety of reasons including low household grain stocks, and a poor performance of the earlier primera harvest. According to the results of the food security assessment carried out in the Dry Corridor in September, 11% of affected households were severely food insecure, and 56% moderately food insecure.
- In **Nicaragua**, around 300,000 jobs depend on coffee production. Coffee exports have reduced with a 32% compared to the same period in 2012. Lower international coffee prices, and a reduction in seasonal employment, is taking a toll on livelihoods.



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

CAR	Central African Republic
CFSAM	Crop and Food Security Assessment Mission
DPRK	Democratic People's Republic of Korea
FAO	Food and Agriculture Organisation of the United Nations
FSNWG	Food Security and Nutrition Working Group
FEWSNET	Famine- Early Warning Systems Network
GAM	Global Acute Malnutrition
IDP	Internally displaced person
IPC	Integrated Food Security Phase Classification
MIRA	Multi Sector/ Cluster Initial Rapid Assessment
SAFEX	South African Futures Exchange
UNCHR	United Nations High Commissioner for Refugees
VAC	Vulnerability Assessment Committees
VAM	Vulnerability Analysis and Mapping
WFP	World Food Programme
WHO	World Health Organisation

Information sources

CILSS:	Comité Inter-Etats de Lutte Contre la Sécheresse au Sahel
FAO:	www.fao.org
FEWS-NET:	www.fews.net
FSNAU:	www.fsnau.org
FSNWG:	www.disasterriskreduction.net/fsnwg
ICO:	www.ico.org
IPC:	www.ipcinfo.org
OCHA:	www.unocha.org
SADC:	www.sadc.int
UNHCR:	www.unhcr.org
UNICEF:	www.unicef.org
UNRWA:	www.unrwa.org
WFP:	www.wfp.org/food-security

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