

FOOD ASSISTANCE OUTLOOK BRIEF

March 2011

PROJECTED FOOD ASSISTANCE NEEDS FOR SEPTEMBER 2011

This section summarizes FEWS NET's most forward-looking analysis of projected external emergency food assistance needs, six months from now, in countries where FEWS NET has a staff presence. Overall needs at a national level are compared to typical needs at this time of year during the last five years and categorized as Above-average, Average, or Below-average/No need. A star (*) indicates new information this month. Projected lean season months that are highlighted in red indicate either an early start or an extension to the typical lean season. For more detail on these projections, please visit www.fews.net.

ABOVE-AVERAGE ASSISTANCE NEEDS PROJECTED IN SEPTEMBER 2011

***AFGHANISTAN: Some improvements, though a poor irrigated season remains likely** **Projected lean season (lowlands): Nov/Dec - March**
Accumulated snowpack has improved since early January, though a below-average harvest remains likely due to reduced area planted and widespread early-season dryness which affected wheat germination. Food price volatility is expected to increase after April. September needs will be above-average, though the most substantial needs will occur later in the year. Lean seasons are likely to begin two to three months early.

CHAD: Poor distribution of 2010/11 harvest to deficit areas **Projected agro-pastoral lean season: Apr - September**
Government stocks are not being rebuilt as quickly as usual because price ceilings have reduced traders' incentives to build stocks. Unusual price spikes are likely between now and August in the food-deficit areas of the pastoral, agro-pastoral, and rain-fed cereals zones still recovering from the 2009/10 crisis. New price ceilings for onions exclusively in Ouaddaï are reducing coping capacity among poor agricultural households in the East.

DJIBOUTI: Coastal rains performing poorly **Projected coastal lean season: April - August**
Assistance needs in September will be high as the *heys/dada* rains failed in coastal areas, below-average *sougoum* rains (March-May) are currently forecast, and households are more vulnerable than usual due to heavy 2008/09 livestock losses.

GUATEMALA: Below average 2010/11 harvests and labor demand **Projected lean season (W. Highlands): ongoing - Oct/Nov**
Harvests in August are likely to lead to significant declines in September assistance needs from the peak of 480,000 people in July. However, food assistance needs in the Highlands will remain above average at least until the November harvest due to below-average harvests in 2009 and 2010 and high prices for maize and fuel.

HAITI: Needs likely to decline with June/July harvest, but remain above normal **Projected rural lean season: ongoing - June**
Spring harvests in key production areas of Artibonite and the southwest are likely to be below average due to the combined effects of the cholera outbreak on the labor market and the continuing recovery of tree crops from Hurricane Tomas. High prices for key imported foods and limited government response capacity due to an extended transition period are likely to contribute to above-average assistance needs in 2011.

KENYA: Second consecutive poor season anticipated in eastern Kenya **Projected lean season (northern pastoral): July-October**
There is a high probability of below-average March-May rains for the second consecutive season in eastern Kenya. Food assistance needs in September are likely to be similar to those in March (approximately 2.4 million people), with the majority in the northern pastoral areas. The lean season in the southeastern marginal agricultural areas is likely to begin normally in August if crops survive the expected shortened season.

***NIGER: Early 2011 lean season, especially in pastoral areas** **Projected lean season (pastoral areas): ongoing - July**
In addition to continuing assistance needs related to the poor 2009/10 season, particularly in pastoral areas, remittances from labor migration to Côte d'Ivoire, Libya, and Nigeria, which had been highly developed in Niger, are not available. Needs will remain above average through September.

***SOMALIA: High levels of need likely to continue over the next six months** **Projected agropastoral lean season: March - June**
Deyr season cereal production was a complete failure and the country faces a severe water crisis. Revised forecasts indicate below-average and erratic April-June *gu* rains, with subsequent pasture and agricultural production deficits likely. Assistance needs are likely to be very high through at least the end of 2011. In the worst case scenario, where *gu* rains fail completely, localized famine conditions are possible in marginal southern cropping areas where food deficits and malnutrition were already extreme as of December 2010.

AVERAGE ASSISTANCE NEEDS PROJECTED IN SEPTEMBER 2011

ETHIOPIA: Needs higher than initially anticipated **Projected lean season (belg): April - September**
Overall September needs are likely to be average as localized crop damage related to wheat rust, floods, and pests, in combination with drought in pastoral areas and the likelihood of a poor *belg* season, offsets an average to above-average 2010 main season harvest.

***SUDAN: Referendum adjustments and high prices likely to impact needs** **Projected lean season: May - September**
The combined impacts of population and market adjustments in response to the referendum, high prices for key staples and fuel, and civil insecurity are likely to lead to above-average assistance needs in Southern Sudan in September 2011 despite last year's above-average harvest. The performance of the rains in 2011 is expected to be average, and needs throughout Sudan are likely to be near average.

BELOW-AVERAGE ASSISTANCE NEEDS OR NO ASSISTANCE NEEDS PROJECTED IN SEPTEMBER 2011

NIGERIA, BURKINA FASO, MALI (none), MALAWI (none), MAURITANIA, MOZAMBIQUE, UGANDA, *TANZANIA: above-average need with internal assistance sufficient through December, **ZAMBIA (none), ZIMBABWE:** limited to chronically food-deficit households.

FEWS NET REMOTE MONITORING

Beyond “presence” countries where it maintains offices and staff, FEWS NET also monitors key indicators related to food security in selected “non-presence” countries. The table below summarizes the current monitoring status of each non-presence country. Red flags indicate that anomalies likely to result in food insecurity have been observed. Yellow flags indicate that anomalies of potential concern have been identified and will be evaluated. Remote monitoring began in January 2010.

BURUNDI		Significantly below-normal production of beans and other staple foods in Kirundo and Canuko provinces, along with increased staple food prices, have increased the risk of food insecurity.
EL SALVADOR	-	Prices for basic staples are increasing earlier than usual, though food security remains stable.
HONDURAS	-	The 2011 <i>tercera</i> bean harvest has begun, increasing bean supplies on markets and lowering prices. The increasing cost of living, particularly high maize prices, remains a concern.
*NICARAGUA		Humanitarian response to acute food shortages in the dry corridor has stabilized food security conditions.
*LIBERIA		Government and major stakeholders expect the influx of Ivorian refugees to reach 100,000 people by end April. Prices for rice and cassava have increased 25 percent over the past month, implying an early onset of the lean season. Food security in host communities of Nimba, Grand Gee, and Maryland is likely to worsen over the coming months.
SENEGAL	-	A second consecutive year of good harvests is likely to lead to good food availability and prices for coarse grains near or below the five-year average.
SIERRA LEONE	-	Two months after harvest, food supplies remain high at the market and household level. Rice and palm oil prices have started to increase abnormally due to high demand and international prices.
TAJIKISTAN		Winter precipitation deficits have closed, however wheat prices are expected to continue to be higher than normal in the coming months.
YEMEN		Food commodity prices remain high as demonstrations escalate in the capitol and the south.

-  Anomalies likely to result in food insecurity have been observed.
-  Anomalies of potential concern have been identified and will be evaluated.
- No anomalies of concern have been observed

LEAN SEASONS IN FEWS NET MONITORED COUNTRIES AND REGIONS

